

2025 Visitor Report

Canada and U.S. Overnight Visitation

prepared June 2026

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About This Report

This report covers Canadian and U.S. overnight visitation only. Other overnight international visitors (overseas) and same-day visitors (all markets) are not captured in the current data, so no section presents combined or total figures – Canadian and U.S. markets are reported separately throughout. 2025 visitor data is the focus of this report with additional references to 2022 through 2025 trend data for both markets.

Two new data sources will be available to supplement future versions of this report. International overnight visitation data and same-day visitor data will be available fall 2026.

Companion Report Visitor spending is covered in the companion 2025 Visitor Spending Report, based on the Canada Tourism Data Collective's Lodging Aligned Spending Reporting (LASR) model. The two are published separately because their scopes differ: this report covers Canadian and U.S. overnight visitation only, while LASR covers all markets including overseas international markets. Dollar figures from the spending report should not be cross-tabulated with this report's visitor counts.

2025 in Context. The 2025 results should be read against the year's external conditions – economic uncertainty, movements in the Canada–U.S. exchange rate, and Canada–U.S. trade and political tensions. U.S. overnight visitation to Ontario softened, while many Canadians chose to travel within Canada rather than to

the United States. VisitorView measures visitation, not motivation, so these are context rather than measured drivers; where they bear on a specific result, the relevant section notes it.

Definitions

- **Visitor:** a unique person observed visiting the region during the period (Canadian market only).
- **Trip:** one visit to the region; a visitor may take multiple trips.
- **Nights:** total overnight stays attributed to the region.
- **Index:** concentration of a traveller segment relative to the base population (100 = average; above 100 = over-represented).
- **Seasons VisitorView definitions:** winter is December (of the prior year) through March (4 months); spring April–June (3 months); summer July–August (2 months); fall September–November (3 months).

Source and Methodology All figures come from the Environics Analytics VisitorView Tourism Suite, which estimates overnight visitation from privacy-compliant, anonymized mobile-location data. Estimates are weighted to Statistics Canada's Frontier Counts (the official record of travellers entering Canada) and to base-population estimates. This report uses full calendar years, 2022 through 2025. Methodology below is drawn from the VisitorView Tourism Suite technical documentation (June 2025).

- **Identifying a Visitor.** An overnight visitor, consistent with Statistics Canada practice: a Canadian device must be observed overnight more than 40 km from its home location; a U.S. device must be observed during night-time hours (6 p.m.–7 a.m.). A device must be observed on at least two calendar days to count.
- **Filters Against Overcounting.** Frequent travellers (such as commuters) and stays longer than typical visits (21+ days Canadian, 30+ days U.S.) are excluded as non-tourism activity.
- **Weighting.** The two markets are weighted differently. Canadian device counts are weighted to the resident population, which lets the model estimate the number of unique visitors. U.S. activity is weighted to Statistics Canada's Frontier Counts.
- **Why U.S. Visitor Counts Are Not Available.** Frontier Counts record trips and nights – entries into Canada – not individual people. Because U.S. activity is controlled to that trip-based benchmark, and because U.S. devices are observable only while inside Canada (never at a home base, as Canadian devices are), the model cannot establish how many distinct people took those trips. U.S. results are therefore reported as trips and nights only; unique visitor counts and nights per visitor are not available.

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About This Report (cont'd)

- **U.S. Origins Are Modelled and Reported at the State Level.** Because U.S. devices are observable only inside Canada, origin is assigned probabilistically – to state (Visitor Travel Survey), county (app-based location data) and block group (PRIZM Premier and population distribution). Canadian origins are observed directly from each device's home location, so Canadian origin can be reported down to the city (census subdivision) level; a comparable U.S. origin-city breakdown is not available, so the U.S. market is shown by state only.
- **Traveller Segments.** The traveller segments presented in this report are Destination Canada's, developed from values-based survey research and linked to Environics Analytics' PRIZM segmentation for Canada and the U.S. Each visiting device's home postal or zip code maps to a PRIZM segment, which in turn maps to a Destination Canada traveller segment; nights are attributed accordingly. Households that do not meet Destination Canada's traveller definition (for example, no overnight trip in paid accommodation in the past five years) are classified as Non-Travellers and are not mapped to any of the seven traveller segments – which is why the seven segments do not sum to 100% of nights.

Limitations

- **Figures are modelled estimates from device samples.** They are most reliable for trends, shares and comparisons; small geographies carry wider margins of error.
- **Privacy protections are applied before data is released;** as a result, sub-geographies may not sum exactly to regional figures.
- **Environics Analytics VisitorView data history for the region begins in 2022;** four years of trend data is currently available.
- **All travel purposes are included.** Environics Analytics VisitorView data captures overnight visitation regardless of trip purpose: visiting friends and relatives (VFR), corporate and business travel, conferences and events, sports tournaments, education- and medical-related stays, and leisure travel.

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2025 Overnight Visitors Overview

In 2025, Hamilton Halton Brant recorded increases in Canadian overnight visitors, trips and nights compared with 2024, while U.S. overnight trips and nights declined. Canadian visitors, trips and nights reached their highest levels of the 2022–2025 reporting data period (as available from Environics Analytics VisitorView Tourism Suite), while both nights per trip and nights per visitor decreased.

2025 Canadian Market Totals

VISITORS	TRIPS	NIGHTS	NIGHTS PER TRIP	NIGHTS PER VISITOR
4.3M	8.3M	13.1M	1.6	3.0
+23.5% from 2024	+24.1% from 2024	+9.7% from 2024	-11.6% from 2024	-11.2% from 2024

2025 U.S. Market Totals

TRIPS	NIGHTS	NIGHTS PER TRIP
399.6K	1.9M	4.8
-8.8% from 2024	-6.9% from 2024	+2.0% from 2024

Observations and Insights

- In 2025, Hamilton Halton Brant welcomed 4.3 million Canadian overnight visitors, who spent 13.1 million nights across 8.3 million trips. These are the strongest domestic results for the region in the four years of available data and a sharp reversal after declines in 2023 and 2024.
- Canadian market growth was driven by trip volume rather than length of stay. Visitors rose 23.5% while nights rose 9.7%, and the average stay declined from 3.4 nights per visitor to 3.0, indicating the region attracted more frequent, shorter overnight travel from domestic markets. Because stays shortened as volumes rose, visitation growth is likely to overstate the year’s economic impact. The companion 2025 Visitor Spending Report puts domestic spending growth from overnight visitors at 2.6%.
- The U.S. market moved in the opposite direction. Trips (–8.8%) and nights (–6.9%) declined after two years of growth, though nights per trip edged up 2.0%, suggesting fewer trips but slightly longer stays among those who came. The contrast between the two markets is consistent with the 2025 conditions described in the front of this report.

Source: Environics Analytics VisitorView Overnight Visitors; Year: 2025. Destination: RTO3 Hamilton Halton Brant Tourism Region; Markets: Canada and U.S.

MARKETS: CANADA AND U.S.

2025 Benchmark Against Ontario

The table below compares Hamilton Halton Brant's year-over-year performance with Ontario across key Canadian and U.S. overnight visitation measures in 2025. Results include changes in visitors, trips, nights and average length of stay where available.

2025 Comparison to Ontario: Canada and U.S. Markets

MARKET AND METRIC	RT03 YOY % CHANGE	ONTARIO YOY % CHANGE
Canada - Visitors	+23.5%	+2.7%
Canada - Trips	+24.1%	+11.5%
Canada - Nights	+9.7%	+3.1%
Canada - Nights Per Trip	-11.6%	-7.6%
Canada - Nights Per Visitor	-11.2%	+0.4%
U.S. - Trips	-8.8%	-4.2%
U.S. - Nights	-6.9%	-4.0%
U.S. - Nights Per Trip	+2.0%	+0.1%

Observations and Insights

- The region outperformed the province in the Canadian market on every measure: visitors (+23.5% against +2.7%), trips (+24.1% against +11.5%) and nights (+9.7% against +3.1%), however, this increase must be considered in context of two previous years of decline in regional visitation data from domestic markets.
- Nights per trip fell 11.6% regionally compared to a 7.6% average decline in nights provincially; nights per visitor fell 11.2% regionally while the provincial figure held steady with a modest 0.4% increase. The decline in stay length regionally means economic impact likely did not grow at a comparable rate as increases in visitors and trips.
- The U.S. market softened more regionally than provincially, with trips (-8.8%) and nights (-6.9%) falling roughly twice as fast as the Ontario averages, but average stays lengthened modestly in both the region and the province.

Source: Environics Analytics VisitorView Overnight Visitors; Year: 2025. Destination: RT03 Hamilton Halton Brant Tourism Region and Ontario; Markets: Canada and U.S.

MARKET: Canada Overnight Visitors

The Canadian market was the primary source of overnight visitation to Hamilton Halton Brant in 2025, accounting for 4.3 million visitors, 8.3 million trips and 13.1 million overnight stays. Ontario remained the region's primary source market, accounting for nearly nine in ten Canadian overnight stays.

This section examines the Canadian overnight market from four perspectives: Hamilton Halton Brant's performance relative to other Ontario tourism regions; visitor origins by province and city; the distribution of overnight visitation across the region's communities; and the Destination Canada traveller segments that characterize the region's overnight visitors.

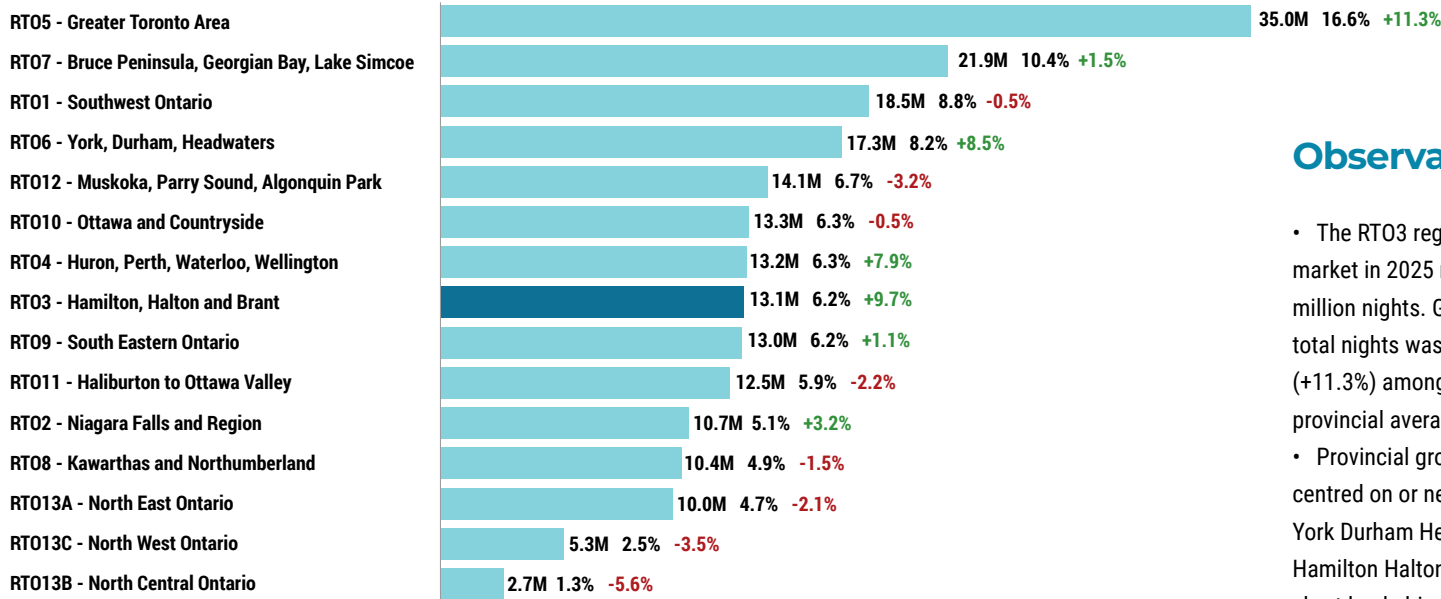
MARKET: CANADA

Market Share by Ontario Tourism Region

The chart below compares Ontario's 15 tourism regions based on total Canadian overnight visitor nights in 2025, showing each region's share of provincial overnight visitor nights and year-over-year change from 2024.

2025 Ontario's Total Nights from All Canadian Markets: 210.6M nights +3.1% over 2024

2025 Share of Nights by Ontario Tourism Region (TOTAL NIGHTS, SHARE OF ONTARIO TOTAL NIGHTS, CHANGE IN NIGHTS OVER 2024)



Observations and Insights

- The RT03 region recorded 13.1 million nights from the domestic market in 2025 representing 6.2% of the provincial total of 210.6 million nights. Growth of 9.7% in regional share of the province's total nights was second only to the Greater Toronto Area growth (+11.3%) among Ontario's 15 tourism regions, and well above the provincial average of 3.1%.
- Provincial growth in nights was concentrated in regions centred on or near large population centres, including the GTA, York Durham Headwaters, Huron Perth Waterloo Wellington and Hamilton Halton Brant. This is consistent with a year of stronger short-haul, drive-to travel domestic visitation.
- Ontario's mid-sized tourism regions remain closely matched in total nights. The regions ranked sixth through ninth were separated by only 100,000 +/- nights.

Source: Environics Analytics VisitorView Overnight Visitors; Year: 2025. Destination: All Ontario Tourism Regions; Markets: Canada.

MARKET: CANADA

Top 10 Origin Provinces by Nights

The table below profiles the top 10 Canadian origin provinces for overnight visitation to Hamilton Halton Brant in 2025, including overnight visitor nights, trips, visitors, average length of stay and year-over-year change from 2024.

Canada Market Totals for RTO3:

13.1M nights +9.7% over 2024 **8.3M trips +24.1% over 2024** **4.3M visitors +23.5% over 2024**
1.6 nights/trip -11.6% over 2024 **3.0 nights/visitor -11.2% over 2024**

2025 Top 10 Origin Provinces by Nights Spent

TOP 10 ORIGIN PROVINCES (BY NIGHTS)	NIGHTS	YOY % CHANGE	TRIPS	YOY % CHANGE	VISITORS	YOY % CHANGE	NIGHTS PER TRIP	YOY % CHANGE	NIGHTS PER VISITOR	YOY % CHANGE
1. Ontario	11.6M	+12.8%	7.7M	+26.2%	3.9M	+26.5%	1.5	-10.6%	3.0	-10.8%
2. Quebec	357.5K	-17.5%	154.8K	-10.5%	125.4K	-5.4%	2.3	-7.8%	2.9	-12.8%
3. British Columbia	344.9K	-9.9%	107.8K	+3.0%	93.3K	+6.1%	3.2	-12.5%	3.7	-15.1%
4. Alberta	269.9K	-2.6%	87.3K	+7.3%	75.9K	+10.7%	3.1	-9.2%	3.6	-12.0%
5. Manitoba	198.0K	-3.0%	78.2K	+7.9%	65.2K	+5.0%	2.5	-10.1%	3.0	-7.6%
6. Nova Scotia	116.5K	-1.4%	35.7K	+6.6%	28.7K	+9.1%	3.3	-7.5%	4.1	-9.6%
7. Saskatchewan	63.4K	-15.3%	22.0K	-4.3%	18.8K	-3.1%	2.9	-11.5%	3.4	-12.1%
8. New Brunswick	63.1K	-8.7%	19.4K	-0.6%	15.7K	-0.4%	3.2	-8.2%	4.0	-8.4%
9. Newfoundland and Labrador	43.7K	-9.4%	11.4K	-5.9%	9.7K	-7.0%	3.8	-3.6%	4.5	-2.6%
10. Prince Edward Island	21.0K	-9.0%	6.4K	+0.1%	5.4K	+5.5%	3.3	-9.0%	3.9	-13.7%

Source: Environics Analytics VisitorView Overnight Visitors; Year: 2025. Destination: RTO3 Hamilton Halton Brant Tourism Region; Markets: Canada.

Top 10 Origin Provinces by Nights (cont'd)

Observations and Insights (see table previous page)

- Visitors from Ontario supplied nearly nine of every ten Canadian overnight nights in the RTO3 region and was the only province from which nights grew (+12.8%) in 2025. Ontarians took more overnight trips (+26.2%) while shortening their stays.
- Nights from all other province declined in 2025, led by Quebec (-17.5% in nights).
- Inter-provincial visitors expectedly stay more nights than intra-provincial visitors with trips originating from Newfoundland and Labrador, British Columbia, Alberta, Nova Scotia, Saskatchewan, New Brunswick and Prince Edward Island all spending 2.9 nights or more compared to 1.5 nights per trip for Ontario travellers.

Top 10 Origin Cities by Nights

The table below profiles the top 10 Canadian origin cities for overnight visitation to Hamilton Halton Brant in 2025, including overnight visitor nights, visitors and year-over-year change from 2024.

2025 Top 10 Canadian Origin Cities by Nights Spent

TOP 10 CANADIAN ORIGIN CITIES (BY NIGHTS)	NIGHTS	YOY % CHANGE	VISITORS	YOY % CHANGE
1. Toronto, Ontario	2.5M	+9.5%	864.7K	+26.9%
2. Brampton, Ontario	594.0K	+12.3%	211.4K	+28.5%
3. London, Ontario	566.7K	+16.1%	188.6K	+31.3%
4. Kitchener, Ontario	450.4K	+30.5%	145.6K	+43.1%
5. Mississauga, Ontario	386.0K	+22.4%	140.8K	+32.9%
6. St. Catharines, Ontario	347.4K	+25.0%	94.6K	+34.9%
7. Ottawa, Ontario	303.9K	-12.1%	91.3K	-0.8%
8. Waterloo, Ontario	293.1K	+11.6%	80.6K	+33.2%
9. Vaughan, Ontario	255.5K	+21.0%	103.1K	+40.1%
10. Markham, Ontario	242.9K	+18.2%	91.8K	+34.3%

Observations and Insights

- Toronto is by far the Hamilton Halton Brant’s largest origin market, generating 2.5 million overnight nights in 2025, more than the next five origin cities combined. All ten leading origin cities (by nights) are in Ontario.
- Growth was broad across nearby urban markets, led by Kitchener (+30.5%), St. Catharines (+25.0%) and Mississauga (+22.4%). Ottawa, the most distant of the top ten, was the only origin city to decline (–12.1% in nights), consistent with the year’s pattern of shorter-haul visitors.
- Visitor growth outpaced night growth in nearly every city, reflecting the 2025 shift toward more frequent, shorter trips to the region across domestic origin markets.

Source: Environics Analytics VisitorView Overnight Visitors; Year: 2025. Destination: RTO3 Hamilton Halton Brant Tourism Region; Market: Canada - Top 10 Origin Cities.

MARKET: CANADA

Share of Market by Sub-Region

The table below profiles Canadian overnight visitation across Hamilton Halton Brant's municipalities and Indigenous communities in 2025, showing overnight visitor nights, trips, visitors, average length of stay and year-over-year change from 2024.

2025 Share of Region's Canadian Visitors by Sub-Region

HAMILTON HALTON BRANT SUB-REGION	NIGHTS	YOY % CHANGE	TRIPS	YOY % CHANGE	VISITORS	YOY % CHANGE	NIGHTS PER TRIP	YOY % CHANGE	NIGHTS PER VISITOR	YOY % CHANGE
Hamilton	5.5M	+7.9%	3.5M	+21.9%	2.0M	+23.3%	1.6	-11.5%	2.7	-12.5%
Burlington	2.2M	+9.3%	1.5M	+24.0%	978.4K	+26.4%	1.5	-11.9%	2.2	-13.6%
Oakville	1.7M	+8.2%	1.1M	+23.7%	720.8K	+26.0%	1.6	-12.5%	2.4	-14.1%
Milton	1.4M	+19.0%	979.6K	+35.6%	680.3K	+40.8%	1.4	-12.3%	2.0	-15.5%
Brantford	996.3K	+5.9%	614.8K	+18.2%	390.6K	+20.3%	1.6	-10.4%	2.6	-12.0%
Halton Hills	663.7K	+13.7%	442.0K	+27.5%	316.1K	+35.9%	1.5	-10.8%	2.1	-16.3%
County of Brant	635.7K	+11.6%	437.2K	+22.5%	313.0K	+27.8%	1.5	-8.9%	2.0	-12.7%
Six Nations of GRT	77.2K	+28.5%	54.3K	+45.6%	36.8K	+39.6%	1.4	-11.7%	2.1	-8.0%
Mississaugas of Credit FN	1.6K	+45.1%	1.0K	+10.4%	960	+13.7%	1.5	+31.5%	1.7	+27.6%

Source: Environics Analytics VisitorView Overnight Visitors; Year: 2025. Destination: RTO3 Hamilton Halton Brant Tourism Region; Market: Canada - RTO3 Sub-Regional Destinations.

MARKET: CANADA

Share of Market by Sub-Region (cont'd)

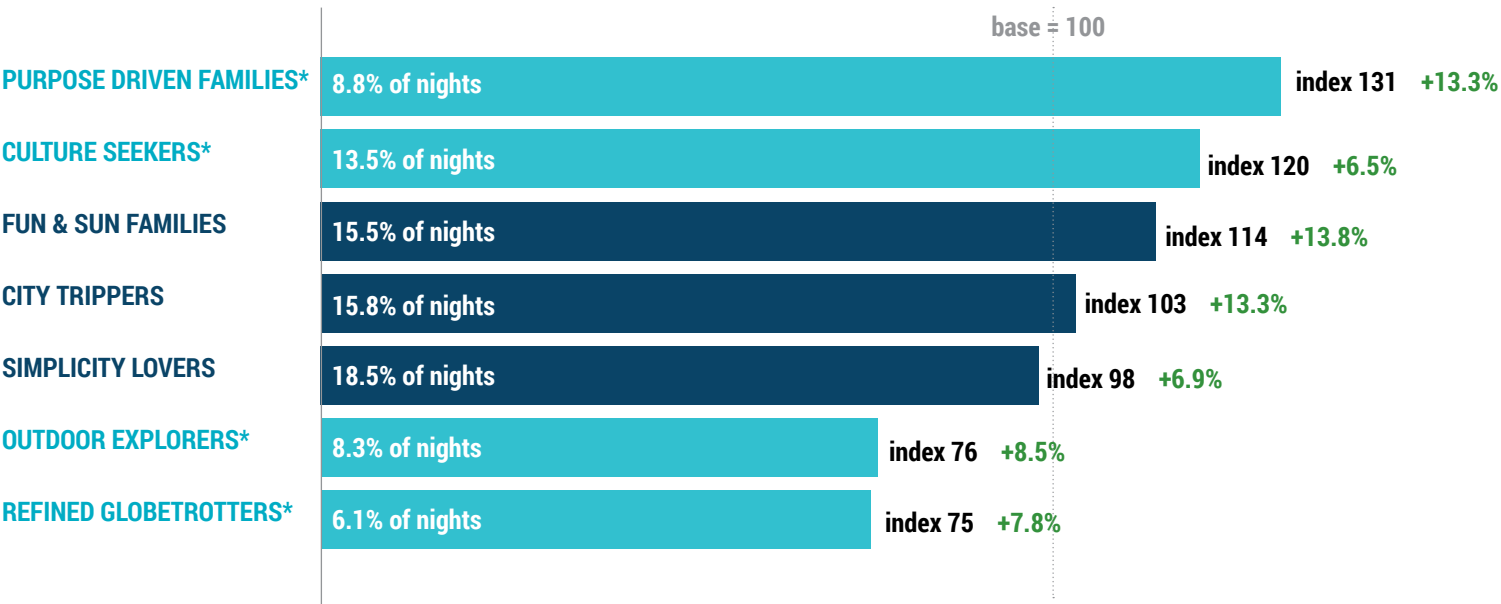
Observations and Insights (see table previous page)

- The City of Hamilton remains the region's primary destination for domestic visitors with 5.5 million Canadian nights spent, just over 40% of the total nights spent in the region. Each Hamilton Halton Brant municipality and Indigenous community recorded growth in nights, trips and visitors in 2025.
- The strongest growth came from the smaller communities: Six Nations of the Grand River (+28.5%), Milton (+19.0%), Halton Hills (+13.7%) and the County of Brant (+11.6%) all exceeded the regional rate.
- The shift toward shorter stays was region-wide with nights per trip and nights per visitor declining in nearly every community.

Overnight Visitor Profiles

Destination Canada’s traveller segmentation model groups travellers based on their travel motivations, behaviours, and values rather than traditional demographic characteristics. This framework is used to align regional visitor tracking with provincial and national tourism data standards. The chart below profiles the region’s Canadian overnight visitors to Hamilton Halton Brant across Destination Canada’s seven core traveller segments, including the four Highly Engaged Guest (*HEG) segments, measuring each profile’s total share of overnight visitor nights and its representation relative to the national Canadian travelling population.

2025 Canadian Overnight Visitors by Traveller Segmentation (% OF TOTAL NIGHTS, INDEX, CHANGE IN NIGHTS OVER 2024)



Source: Environics Analytics VisitorView Overnight Visitors; Year: 2025. Destination: RTO3 Hamilton Halton Brant Tourism Region; Market: Canada; Profile: Destination Canada Segments for Canadian market. Traveller segments are based on Destination Canada’s national segmentation model and are applied to Canadian overnight visitors captured in the VisitorView dataset. Segment Index compares the representation of each traveller segment among Hamilton Halton Brant overnight visitors with its representation within Canada’s overnight travelling population (Index = 100). Visitors segmented by Environics as ‘non-travellers’ are excluded from the analysis.

MARKET: CANADA

Overnight Visitor Profiles (cont'd)

Observations and Insights (see table previous page)

- The region's Canadian visitors lean toward purposeful travel with two of Destination Canada's Highly-Engaged Guest Segments (HEGs) over over-represented in total nights compared with the Canadian travelling population (Purpose Driven Families - Index 131 and Culture Seekers - Index 120). Outdoor Explorers (Index 76) and Refined Globetrotters (Index 75) are Destination Canada's two remaining HEGs but nights from these segments are under-indexed in RTO3.
- Growth in nights in 2025 was reflected in all of Destination Canada's Traveller Segments, led by Fun & Sun Families (+13.8%), Purpose Driven Families (+13.3%) and City Trippers (+13.3%).

MARKET: U.S. Overnight Visitors

The U.S. market generated 399.6K overnight trips to Hamilton Halton Brant in 2025, accounting for 1.9 million overnight stays. Unlike the Canadian market, unique visitor counts are not available for U.S. visitation; therefore, this section reports U.S. performance by trips and nights.

This section examines the U.S. overnight market from four perspectives: Hamilton Halton Brant's performance relative to other Ontario tourism regions; where U.S. overnight trips originated by state; how overnight visitation was distributed across the region's communities; and which Destination Canada traveller segments were most strongly represented.

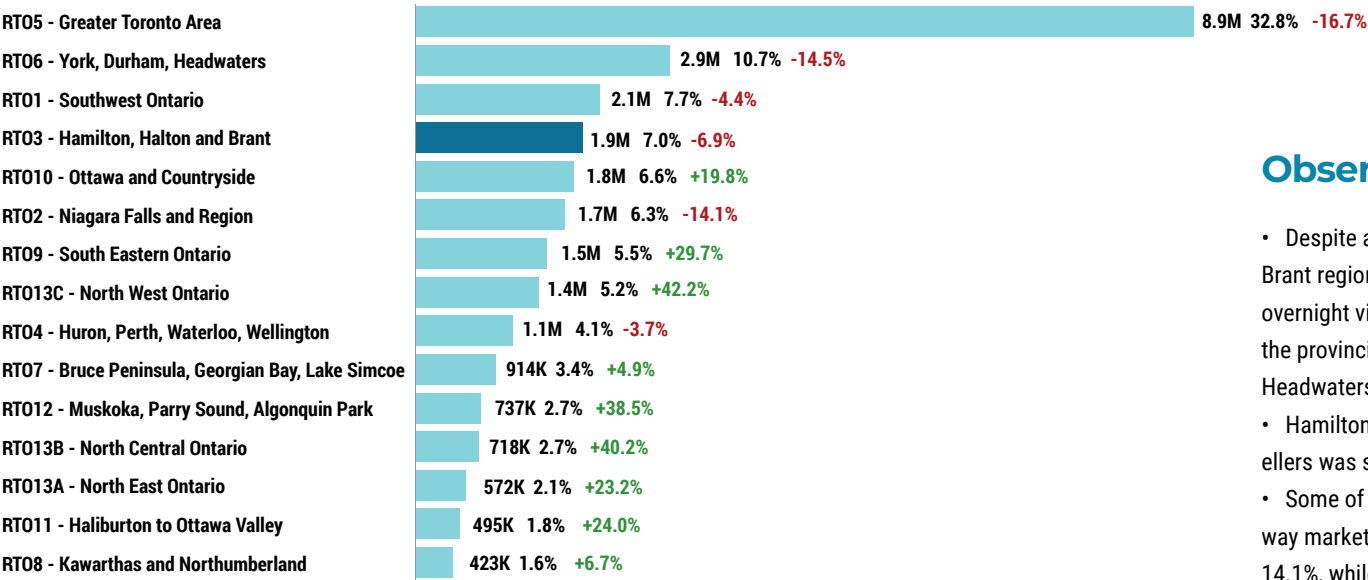
MARKET: U.S.

Market Share by Ontario Tourism Region

The chart below compares Ontario tourism regions by total U.S. overnight visitor nights in 2025, showing each region's share of provincial overnight visitor nights and year-over-year change from 2024.

2025 Ontario's Total Nights from All U.S. Markets: **27.1M nights -4.0% over 2024**

2025 Share of Nights by Ontario Tourism Region (TOTAL NIGHTS, SHARE OF ONTARIO TOTAL NIGHTS, CHANGE IN NIGHTS OVER 2024)



Observations and Insights

- Despite a decline in total night stays in 2025, the Hamilton Halton Brant region remained one of Ontario's top 5 destinations for U.S. overnight visitors, ranking fourth with 1.9 million nights, or 7.0% of the provincial total, behind the Greater Toronto Area, York Durham Headwaters and Southwest Ontario.
- Hamilton Halton Brant's 6.9% decline in nights spent by U.S. travellers was steeper than the province's average decline of 4.0%
- Some of the largest losses in nights were seen in the major gateway markets, with the GTA down 16.7% and Niagara Region down 14.1%, while the Ottawa gateway destination increased by 19.8%.
- Nine smaller regions grew in U.S. nights, led by North West Ontario (+42.2%), North Central Ontario (+40.2%) and Muskoka/Parry Sound (+38.5%).

Source: Environics Analytics VisitorView Overnight Visitors; Year: 2025. Destination: All Ontario Tourism Regions; Markets: U.S.

MARKET: U.S.

Top 10 Origin States by Nights

The table below profiles the top 10 U.S. origin states for overnight visitation to Hamilton Halton Brant in 2025, showing overnight visitor nights, trips, nights per trip and year-over-year change from 2024.

U.S. Market Totals for RTO3:

1.9M nights **-6.9% over 2024** **399.6K trips** **-8.8% over 2024** **4.8 nights/trip** **+2.0% over 2024**

2025 Top 10 Origin States by Nights Spent

TOP 10 ORIGIN STATES (BY NIGHTS)	NIGHTS	YOY % CHANGE	TRIPS	YOY % CHANGE	NIGHTS PER TRIP	YOY % CHANGE
1. California	281.5K	+2.7%	37.4K	-6.9%	7.5	+10.3%
2. New York	275.3K	-5.5%	53.7K	-6.0%	5.1	+0.5%
3. Texas	220.3K	+28.4%	22.6K	+14.0%	9.7	+12.7%
4. Florida	105.5K	-14.5%	31.0K	-10.1%	3.4	-4.9%
5. Michigan	98.0K	-1.0%	33.1K	+8.7%	3.0	-8.9%
6. Pennsylvania	87.2K	+0.1%	19.1K	-4.8%	4.6	+5.1%
7. Missouri	78.3K	-23.5%	11.4K	-18.5%	6.9	-6.1%
8. Illinois	77.9K	-12.3%	22.4K	-15.8%	3.5	+4.2%
9. Georgia	68.7K	-19.4%	14.9K	-23.4%	4.6	+5.2%
10. Ohio	62.7K	-20.3%	19.6K	-15.9%	3.2	-5.2%

Observations and Insights

- California was the Hamilton Halton Brant region's largest U.S. origin state in 2025, rising 2.7% to 281.5K nights while New York declined 5.5% to 275.3K. Texas grew fastest, up 28.4% to 220.3K.
- Within the top 10 origin states, declines in nights were seen in seven states. The only two of the top 10 states to show meaningful increases in total nights were California and Texas.
- Average stays generally increase with distance. Texas (9.7 nights per trip) and California (7.5) recorded the longest stays, while Michigan (3.0) and Ohio (3.2) recorded the shortest.

Source: Environics Analytics VisitorView Overnight Visitors; Year: 2025. Destination: RTO3 Hamilton Halton Brant Tourism Region; Market: U.S.; Profile: Top 10 Origin States. Visitor counts and average nights per visitor are not available for the U.S. market.

MARKET: U.S.

Share of Market by Sub-Region

The table below profiles U.S. overnight visitation across Hamilton Halton Brant’s municipalities and Indigenous communities in 2025, showing overnight visitor nights, trips, average nights per trip and year-over-year change from 2024. Visitor counts and average nights per visitor are not available for the U.S. market.

2025 Share of Region’s U.S. Visitor Nights by Sub-Region

HAMILTON HALTON BRANT SUB-REGION	NIGHTS	YOY % CHANGE	TRIPS	YOY % CHANGE	NIGHTS PER TRIP	YOY % CHANGE
Hamilton	678.8K	-6.8%	146.2K	-5.5%	4.6	-1.4%
Oakville	492.2K	-6.2%	106.1K	-5.4%	4.6	-0.9%
Burlington	328.1K	+2.8%	78.9K	-2.6%	4.2	+5.5%
Milton	208.3K	-22.7%	50.9K	-16.0%	4.1	-8.0%
Brantford	94.9K	-4.6%	23.3K	-2.6%	4.1	-2.0%
Halton Hills	67.3K	-10.9%	20.3K	-1.2%	3.3	-9.8%
County of Brant	49.6K	+9.8%	13.3K	+3.2%	3.7	+6.4%
Six Nations of GRT	13.5K	+27.1%	3.5K	+45.2%	3.9	-12.4%
Mississaugas of Credit FN	–	–	–	–	–	–

Observations and Insights

- The regional decline in nights from U.S. markets was seen across the region.
- Unlike the Canadian market, where each Hamilton Halton Brant community saw increased nights, change in nights spent by U.S. travellers uneven, with five of the eight reported communities declining and just three seeing increases.
- U.S. traveller nights spent in Hamilton and Oakville together account for about 60% of the region’s U.S. nights but each sub-region saw declines in total nights of over 6%.
- Milton and Halton Hills saw double digit percentage declines in U.S. nights, with Six Nations, County of Brant and Burlington each recording increases in nights spent.

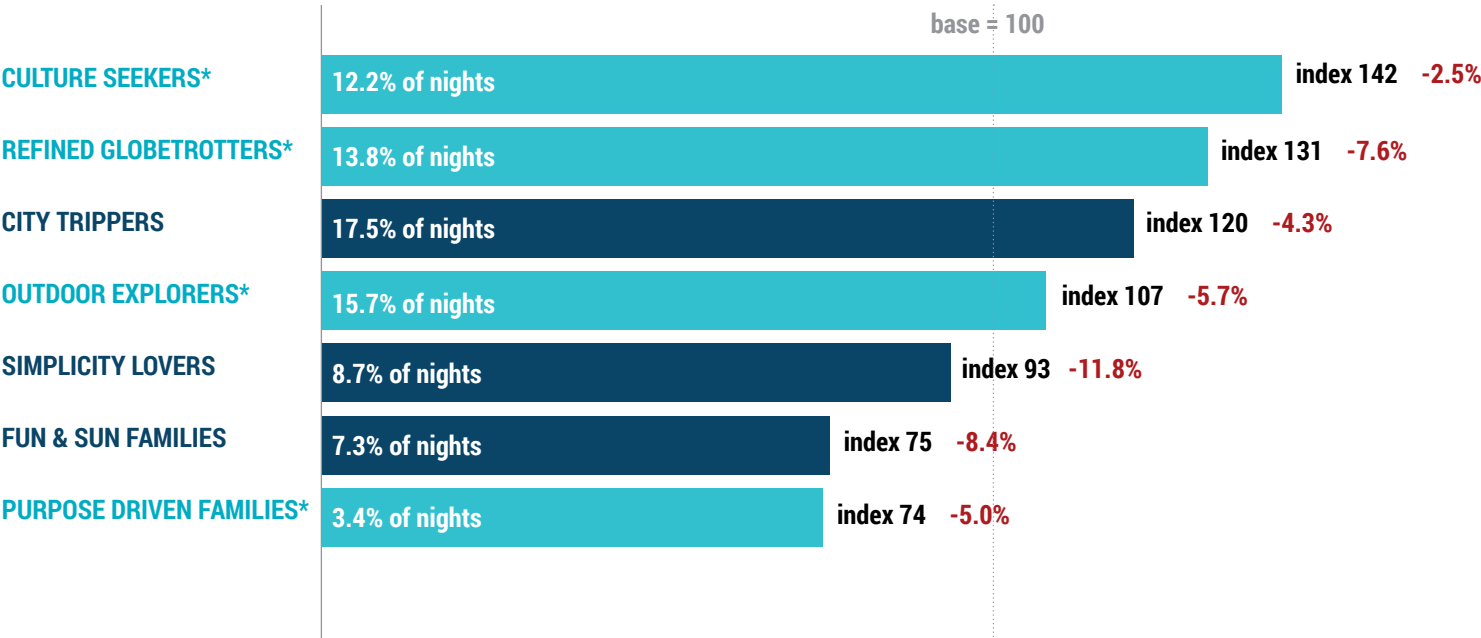
Source: Environics Analytics VisitorView Overnight Visitors; Year: 2025. Destination: RTO3 Hamilton Halton Brant Tourism Region; Market: U.S. - RTO3 Sub-Regional Destinations. Visitor counts and average nights per visitor are not available for the U.S. market. Data for Mississaugas of Credit First Nation sub-region fall below reporting platform suppression threshold and are not available.

MARKET: U.S.

Overnight Visitor Profiles

Destination Canada’s traveller segmentation model groups travellers based on their travel motivations, behaviours, and values rather than traditional demographic characteristics. This framework is utilized to align regional visitor tracking with provincial and national tourism data standards. The chart below profiles the region’s U.S. overnight visitors across Destination Canada’s seven core traveller segments, including the four Highly Engaged Guest (*HEG) segments, measuring each profile’s total share of overnight visitor nights and its representation relative to the national U.S. travelling population.

2025 U.S. Overnight Visitors by Traveller Segmentation (% OF TOTAL NIGHTS, INDEX, CHANGE IN NIGHTS OVER 2024)



Source: Environics Analytics VisitorView Overnight Visitors; Year: 2025. Destination: RTO3 Hamilton Halton Brant Tourism Region; Market: U.S.; Profile: U.S. Destination Canada Segments. Traveller segments are based on Destination Canada’s national segmentation model and are applied to U.S. overnight visitors captured in the VisitorView dataset. Segment Index compares the representation of each traveller segment among Hamilton Halton Brant overnight visitors with its representation within the U.S. overnight travelling population (Index = 100). Visitors segmented by Environics as ‘non-travellers’ are excluded from the analysis.

MARKET: U.S.

Overnight Visitor Profiles (cont'd)

Observations and Insights (see table previous page)

- Nights spent by U.S. visitors from all Destination Canada Traveller segments declined in 2025 mirroring the broader softening of the U.S. market.
- U.S. visitors are concentrated in urban and experience-oriented segments. City Trippers held the largest share of nights (17.5%), followed by three HEG segments: Outdoor Explorers (15.7%), Refined Globetrotters (13.8%) and Culture Seekers (12.2%).
- These three HEG segments also index above the U.S. travelling population with the fourth HEG segment, Purpose Driven Families, under-indexed.

TRENDS

Understanding how overnight visitation changes over time provides important context for interpreting annual performance. Seasonal patterns reveal when visitors travelled throughout the year, while multi-year trends illustrate how overnight visitation has evolved since 2022 and whether recent changes reflect longer-term growth or short-term market conditions.

This section shows overnight visitor nights by season for 2025, and by year from 2022 to 2025, for both the Canadian and U.S. markets.

MARKETS: CANADA AND U.S.

Visitor Nights by Season

The charts below show Canadian and U.S. overnight visitor nights by season in 2025. VisitorView's tourism seasons are unequal in length – winter covers four months (DEC-MAR), spring three months (APR-JUN), summer two months (JUL-AUG) and fall three months (SEPT-NOV). The totals should be read as seasonal patterns, not as a direct ranking of one season against another; where seasons are compared, figures are shown as an average per-month for each season.

Canadian Visitor Nights by Season



U.S. Visitor Nights by Season



Observations and Insights

Canadian Market

- Summer remained the peak season at 1.25 million nights per month (average), up 8.7% from 2024. Spring recorded the largest gain, up 16.7% to become the second-busiest season per month, and fall grew by 10.7%.
- Winter was the only season to decline in total nights (-11.9%) and represents the lowest average of nights on a per-month basis.

U.S. Market

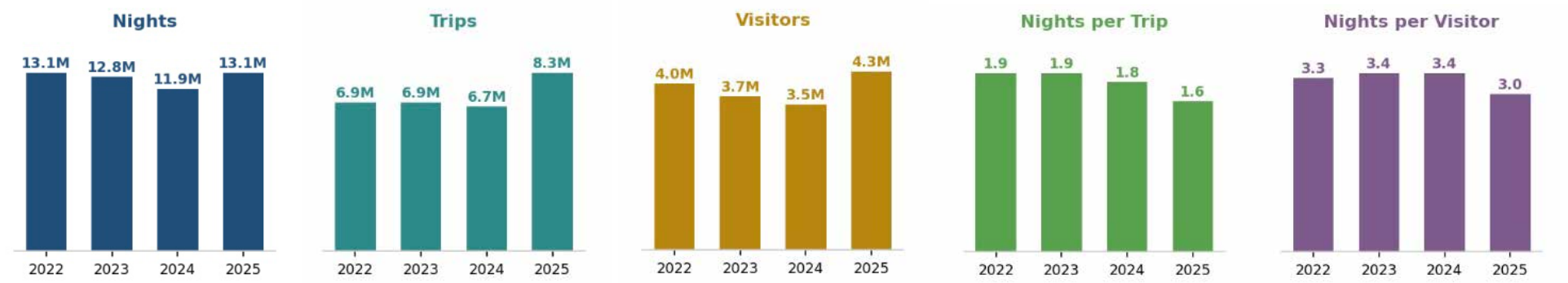
- Total nights spent by U.S. markets peaked during the summer months with an average of 206.5K nights per month but fell 23.7% from the previous year – the largest seasonal change in either market.
- Fall was the only season to see growth in total nights (+5.5%), while winter was roughly flat (-1.6%) and spring declined 4.0%.

Source: Environics Analytics VisitorView Overnight Visitors; Year: 2025. Destination: RTO3 Hamilton Halton Brant Tourism Region; Markets: Canada and U.S. Tourism seasons as defined by Environics are used for this data and seasons are not equal length as follows: Winter 2025 = Dec 1 2024 to Mar 31 2025, Spring 2025 = Apr 1 2025 to Jun 30 2025, Summer 2025 = July 1 2025 to Aug 31 2025, Fall 2025 = Sept 1 2025 - Nov 30 2025. Average monthly data is reflected for comparison purposes. Because winter includes December 2024, seasonal totals do not sum to the calendar year totals for 2025.

Canada Market: Four-Year Trend

The chart below shows Canadian overnight visitor nights in Hamilton Halton Brant from 2022 to 2025, illustrating how overnight visitation has changed over the past four years and providing context for the region's 2025 performance.

Four-Year Trend: 2022 to 2025



YOY % Change: 2022 to 2025

YEAR	NIGHTS	YOY % CHANGE	TRIPS	YOY % CHANGE	VISITORS	YOY % CHANGE	NIGHTS PER TRIP	YOY % CHANGE	NIGHTS PER VISITOR	YOY % CHANGE
2022	13.1M	-	6.9M	-	4.0M	-	1.9	-	3.3	-
2023	12.8M	-2.3%	6.9M	-1.2%	3.7M	-6.5%	1.9	-1.1%	3.4	+4.5%
2024	11.9M	-6.9%	6.7M	-3.1%	3.5M	-6.4%	1.8	-4.0%	3.4	-0.6%
2025	13.1M	+9.7%	8.3M	+24.1%	4.3M	+23.5%	1.6	-11.6%	3.0	-11.2%

Source: Environics Analytics VisitorView Overnight Visitors; Year: 2022 to 2025. Destination: RTO3 Hamilton Halton Brant Tourism Region; Markets: Canada.

Canada Market: Four-Year Trend (cont'd)

Observations and Insights (see table previous page)

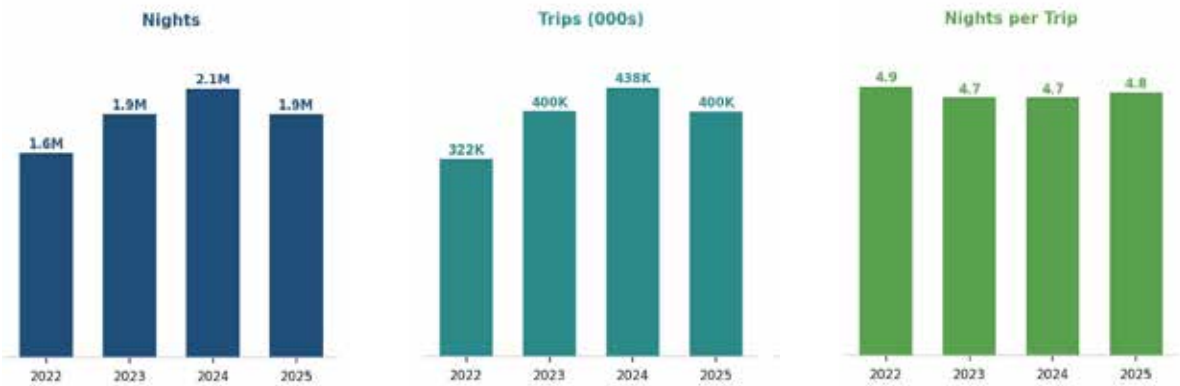
- Canadian visitation turned upward in 2025 after two years of decline. From 2024, visitors rose 23.5% to 4.3 million and trips 24.1% to 8.3 million, both four-year highs, while nights recovered to their 2022 level of 13.1 million.
- Across the four years of available data, nights per trip has declined year-over-year, from 1.9 nights in 2022 to 1.6 nights in 2025.
- The 2025 increase in total nights came almost entirely from Ontario, which added roughly 800,000 visitors while other provinces were collectively unchanged.

MARKET: U.S.

U.S. Market: Four-Year Trend

The chart below shows U.S. overnight visitor nights in Hamilton Halton Brant from 2022 to 2025, illustrating how overnight visitation has changed over the past four years and providing context for the region's 2025 performance.

Four-Year Trend: 2022 to 2025



Observations and Insights

- In 2025, the U.S. decline came from fewer trips rather than shorter stays, suggesting softer demand rather than changed behaviour.
- Total nights spent by U.S. visitors grew 20.2% in 2023 and 9.2% in 2024, before losing those gains with 2025 nights returning to 2023 levels.
- U.S. nights per trip held reasonably steady with an average 4.7 and 4.9 nights over the four year period.

YOY % Change: 2022 to 2025

YEAR	NIGHTS	YOY % CHANGE	TRIPS	YOY % CHANGE	NIGHTS PER TRIP	YOY % CHANGE
2022	1.6M	–	321.8K	–	4.9	–
2023	1.9M	+20.2%	400.1K	+24.4%	4.7	-3.3%
2024	2.1M	+9.2%	438.1K	+9.5%	4.7	-0.2%
2025	1.9M	-6.9%	399.6K	-8.8%	4.8	+2.0%

Source: Environics Analytics VisitorView Overnight Visitors; Year: 2022 to 2025. Destination: RTO3 Hamilton Halton Brant Tourism Region; Markets: U.S. Visitor counts and average nights per visitor are not available for the U.S. market.



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