Niagara Tourism Data Dashboard

Q1 2026 REPORT

NIAGARA PARKS

TOURISM NIAGARA CANADA

NIAGARA ECONOMIC DEVELOPMENT

October 2026 | All information contained herein is subject to the Usage & Limitations Statement

Q1 2026 Key Findings



Fewer visitors, but materially higher yield per visitor:
Niagara attracted a smaller but higher spending visitor base in Q1. Growth in visitor expenditures was concentrated in destination experiences and recreation, rather than being driven solely by overnight accommodation demand.

Domestic demand and cross-border traffic softened:
The results suggest a weaker environment for short-haul and discretionary travel during the winter quarter. Colder, wetter conditions may also have reduced day trips and spontaneous cross-border visits.





Hotel gains may reflect demand reallocation from short-term rentals:
Hotel performance improved while the STR market contracted. This points to a changing accommodation mix with hotel operators potentially benefiting from reduced STR availability and a higher-yield visitor profile.

Q1 2026 Key Findings



Spending growth should be interpreted carefully in light of prices, including the end of the HST holiday:
Ontario tourism-related prices were higher in Q1 2026, particularly for restaurants. The federal GST/HST holiday began on December 14, 2024 and ended on February 15, 2025, temporarily removing tax from qualifying restaurant meals and other eligible items. Because part of Q1 2025 included this tax relief while Q1 2026 reflected normal tax-inclusive pricing, the year-over-year restaurant inflation measure is elevated by a base effect. This likely contributed to higher reported food and beverage expenditures, but it does not explain the full increase in visitor spending.

Tourism construction investment declined, but quarterly results should be interpreted cautiously:
Tourism-related construction investment was lower year over year. However, the data are unadjusted and are therefore influenced by the timing of individual projects, permit issuance, construction starts, and reporting cycles. A single major hotel, restaurant, or attraction development can materially affect quarterly results.



Visitor Overview - Canada

COMPARISON OF Q1 2026 vs Q1 2025

SOURCE: ENVIRONICS ANALYTICS
VISITORVIEW TOURISM SUITE

Nights

TOTAL NIGHTS STAYED

-16.3%

Q1 2025	Q1 2026
1,844,000	1,542,700

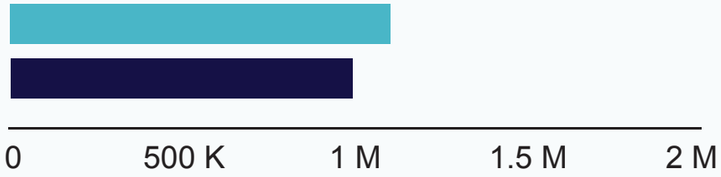


Trips

TOTAL TRIPS TAKEN

-15.3%

Q1 2025	Q1 2026
1,185,200	1,003,500

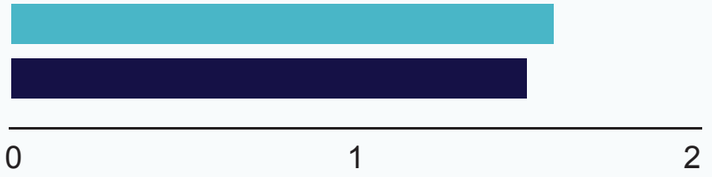


Nights/Trip

AVERAGE NIGHTS PER TRIP

-6.3%

Q1 2025	Q1 2026
1.6	1.5



Note: While January recorded growth in both visitors and overnight stays, February and March were significantly weaker due to poor weather conditions. Broader economic uncertainty and geopolitical tensions also weighed on domestic travel demand, contributing to the overall decline in Q1 visitation and overnight stays.

INSIGHT | **Domestic travel saw a decrease in Q1 2026 compared to Q1 2025.**

Visitor Overview - United States

COMPARISON OF Q1 2026 vs Q1 2025

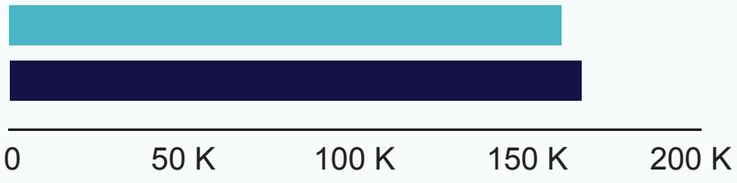
SOURCE: ENVIRONICS ANALYTICS
VISITORVIEW TOURISM SUITE

Nights

TOTAL NIGHTS STAYED

3.2%

Q1 2025	Q1 2026
154,900	159,800

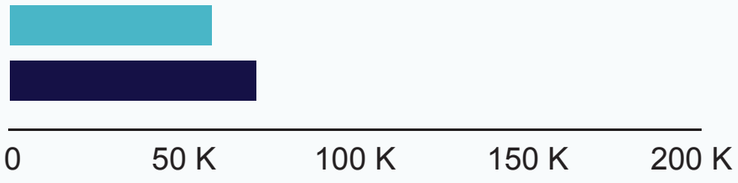


Trips

TOTAL TRIPS TAKEN

10.3%

Q1 2025	Q1 2026
58,500	64,600

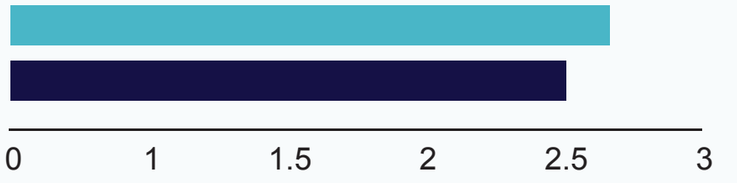


Nights/Trip

AVERAGE NIGHTS PER TRIP

-3.8%

Q1 2025	Q1 2026
2.6	2.5



INSIGHT | **Travel from the U.S increased over the same time last year, although they spent fewer nights per trip.**

Visitor Overview - International

COMPARISON OF Q1 2026 vs Q1 2025

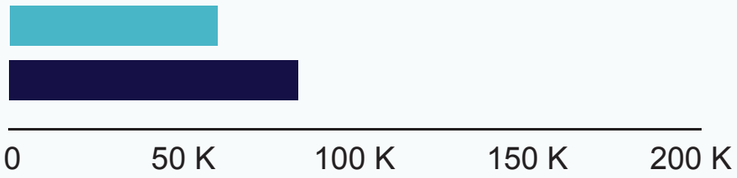
SOURCE: ENVIRONICS ANALYTICS
VISITORVIEW TOURISM SUITE

Nights

TOTAL NIGHTS STAYED

36.4%

Q1 2025	Q1 2026
61,600	84,100

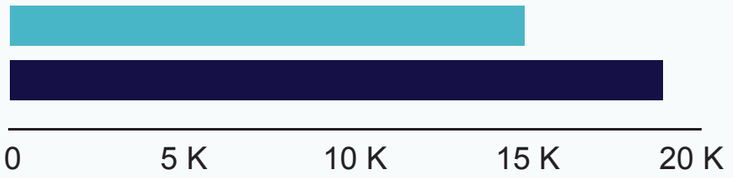


Trips

TOTAL TRIPS TAKEN

25.8%

Q1 2025	Q1 2026
15,100	19,000

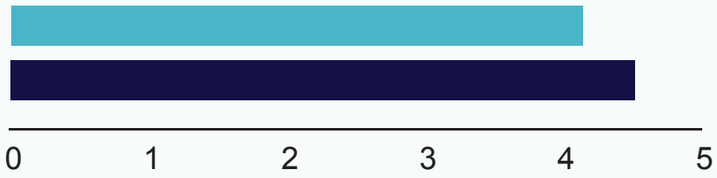


Nights/Trip

AVERAGE NIGHTS PER TRIP

7.3%

Q1 2025	Q1 2026
4.1	4.4



INSIGHT | **International travel increased in Q1 2026 over Q1 2025.**

Visitor Overview - Total

COMPARISON OF Q1 2026 vs Q1 2025

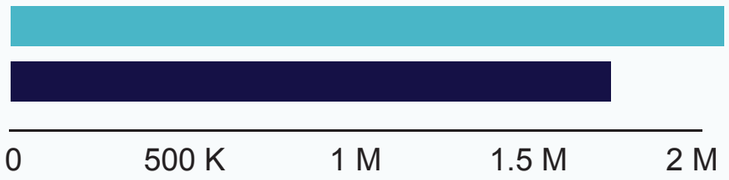
SOURCE: ENVIRONICS ANALYTICS
VISITORVIEW TOURISM SUITE

Nights

TOTAL NIGHTS STAYED

-13.3%

Q1 2025	Q1 2026
2,060,500	1,786,600

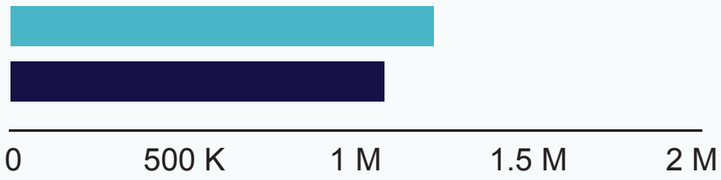


Trips

TOTAL TRIPS TAKEN

-13.6%

Q1 2025	Q1 2026
1,258,800	1,087,000

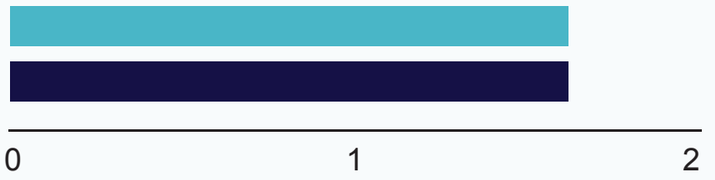


Nights/Trip

AVERAGE NIGHTS PER TRIP

0.0%

Q1 2025	Q1 2026
1.6	1.6



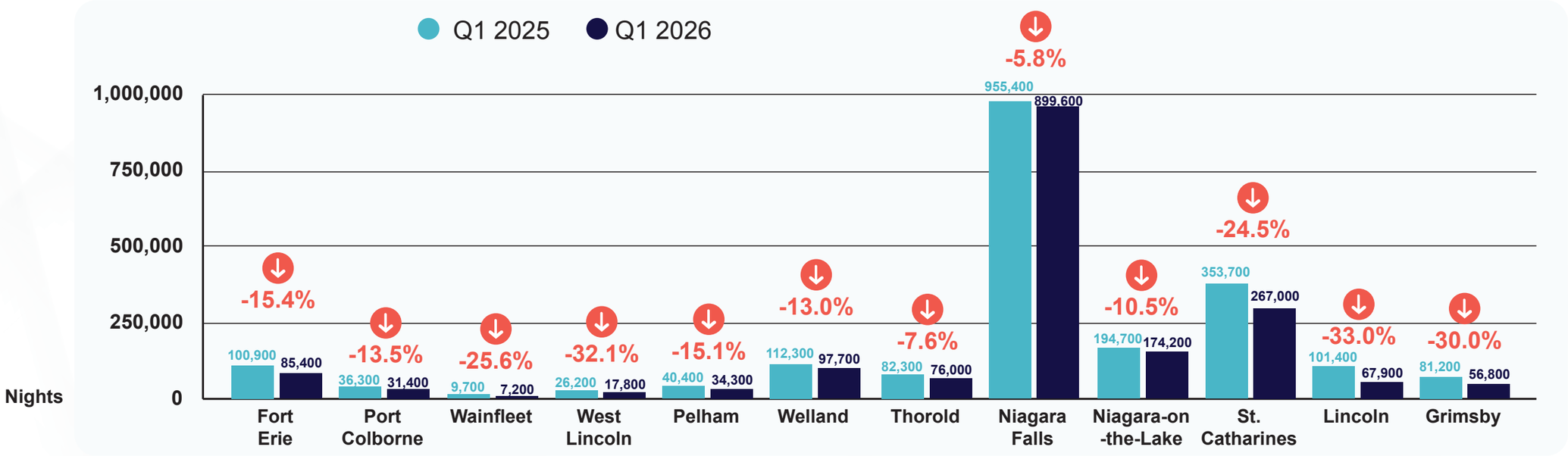
Note: While January recorded growth in both visitors and overnight stays, February and March were significantly weaker due to poor weather conditions. Broader economic uncertainty and geopolitical tensions also weighed on domestic travel demand, contributing to the overall decline in Q1 visitation and overnight stays.

INSIGHT | **“Total Nights Stayed” and “Total Trips Taken” declined in Q1 2026 compared to Q1 2025.**

Total Nights by Municipality

COMPARISON OF Q1 2026 vs Q1 2025

SOURCE: ENVIRONICS ANALYTICS
VISITORVIEW TOURISM SUITE



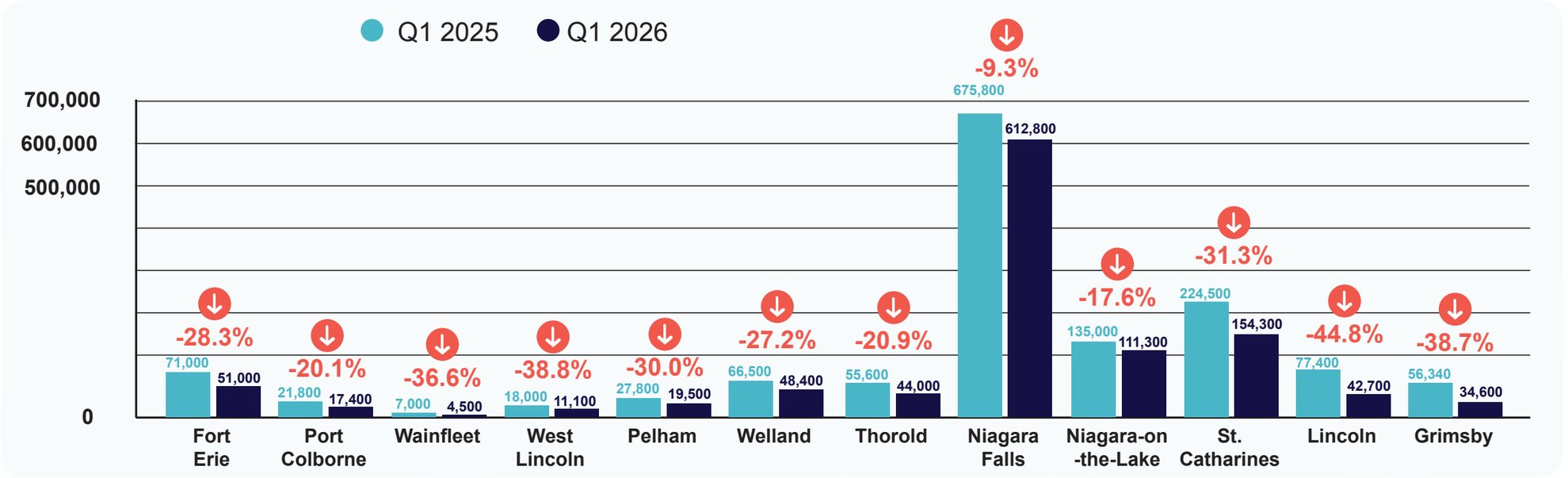
Note: The totals above show domestic, US and international data combined. While January recorded growth in both visitors and overnight stays, February and March were significantly weaker due to poor weather conditions. Broader economic uncertainty and geopolitical tensions also weighed on domestic travel demand, contributing to the overall decline in Q1 visitation and overnight stays.

INSIGHT | **“Total Nights Stayed” in all municipalities declined in Q1 2026 compared to Q1 2025.**

Total Trips by Municipality

COMPARISON OF Q1 2026 vs Q1 2025

SOURCE: ENVIRONICS ANALYTICS
VISITORVIEW TOURISM SUITE



Note: The totals above show domestic, US and international data combined. While January recorded growth in both visitors and overnight stays, February and March were significantly weaker due to poor weather conditions. Broader economic uncertainty and geopolitical tensions also weighed on domestic travel demand, contributing to the overall decline in Q1 visitation and overnight stays.

INSIGHT | **“Total Trips” in all municipalities declined in Q1 2026 compared to Q1 2025.**

Expenditures

COMPARISON OF Q1 2026 vs Q1 2025

SOURCE: DESTINATION CANADA

OVERALL GROWTH

+31.2%

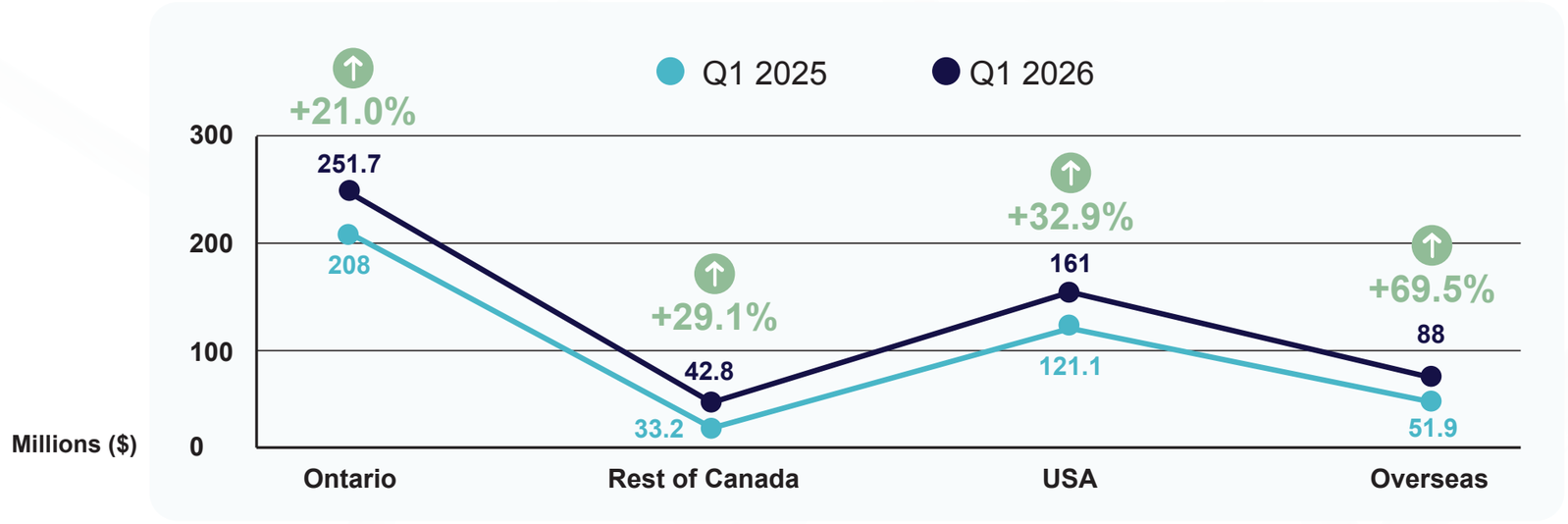
Total increase in Q1 2026 vs. 2025

STRONGEST GAIN

Overseas

+69.5%

YoY increase



Note: The year-over-year percentage results are preliminary and subject to revision. This data will be updated at the source if revised data become available. Estimated spend data is derived from Destination Canada's Lodging Spend Reporting (May, 7th, 2026). Use, distribution, or republication of these estimates requires Destination Canada's written consent.

INSIGHT | **All markets showed year-over-year growth.**

Expenditures

COMPARISON OF Q1 2026 vs Q1 2025

SOURCE: DESTINATION CANADA

OVERALL GROWTH

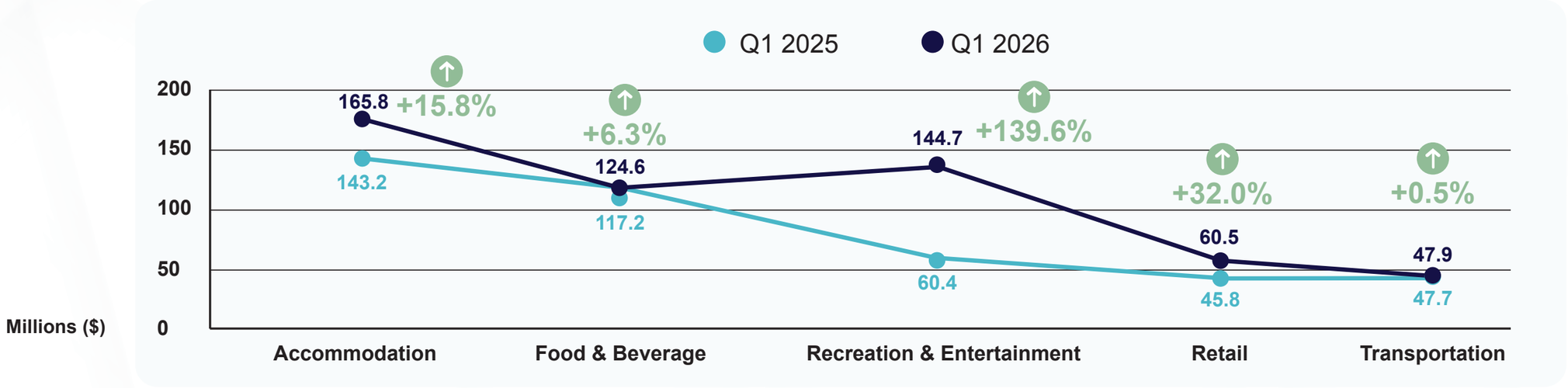
+31.2%

Total increase in Q1 2026 vs. 2025

STRONGEST GAIN

Recreation & Entertainment

+139.6%



Note: The year-over-year percentage results are preliminary and subject to revision. This data will be updated at the source if revised data become available. Estimated spend data is derived from Destination Canada's Lodging Spend Reporting (May, 7th, 2026). Use, distribution, or republication of these estimates requires Destination Canada's written consent.

INSIGHT | **All categories showed year-over-year growth.**

Accommodations

COMPARISON OF Q1 2026 vs Q1 2025

SOURCE: STR,
A COSTAR COMPANY

OCCUPANCY (%)

+4.7%

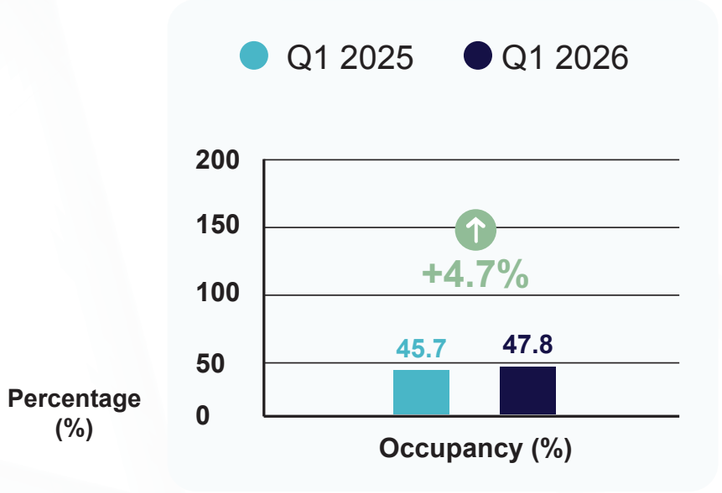
AVERAGE DAILY RATE ($)

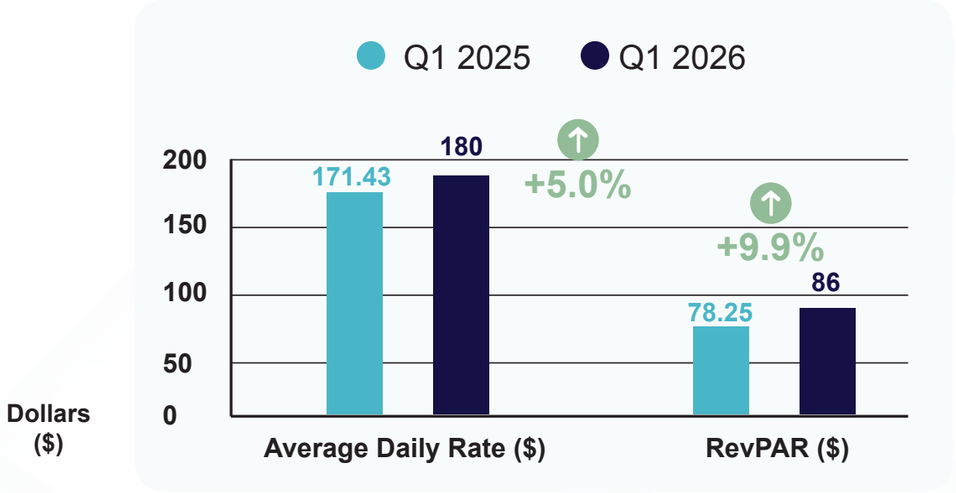
+5.0%

RevPAR ($) LEADS GROWTH

+9.9%

Total increase in
Q1 2026 vs. 2025





INSIGHT | **Overall positive performance in occupancy and revenue performance.**

Short-Term Rental Accommodation

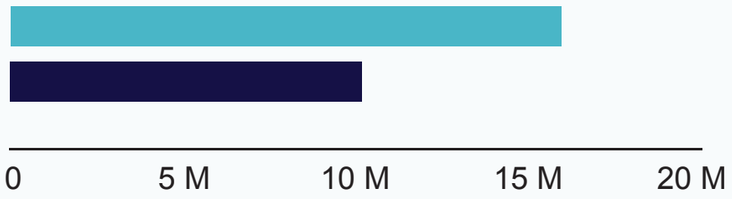
COMPARISON OF Q1 2026 vs Q1 2025

SOURCE: AIRDNA

Revenue ($)

-38.8%

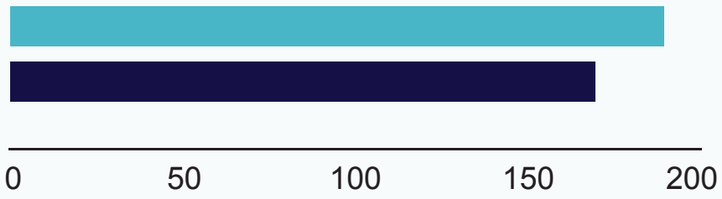
Q1 2025	Q1 2026
$16,340,000	$10,000,000



Average Daily Rate ($)

-8.6%

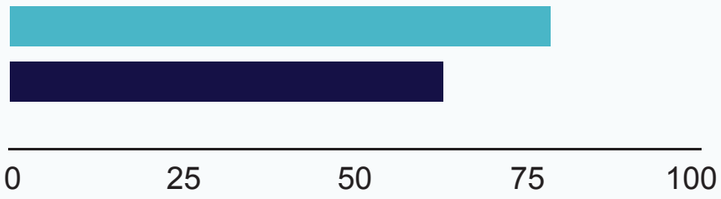
Q1 2025	Q1 2026
$183.81	$168.00



RevPAR ($)

-16.0%

Q1 2025	Q1 2026
$78.93	$66.30



Note: The year-over-year percentage results are preliminary and subject to revision. This data will be updated at the source if revised data become available.

INSIGHT | **All three key metrics declined in Q1 2026 compared to Q1 2025.**

Short-Term Rental Accommodation

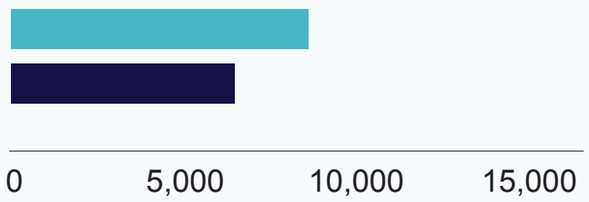
COMPARISON OF Q1 2026 vs Q1 2025

SOURCE: AIRDNA

Available Listings

-27.4%

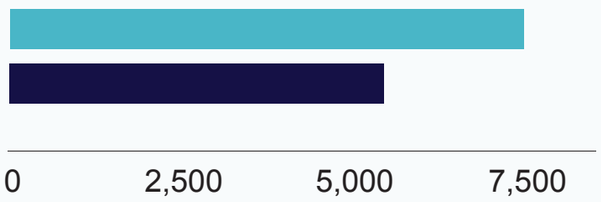
Q1 2025	Q1 2026
8,548	6,240



Booked Listings

-28.0%

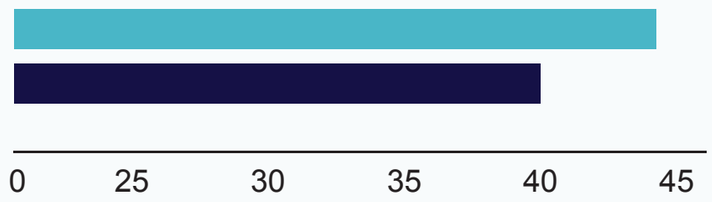
Q1 2025	Q1 2026
7,496	5,397



Occupancy Rate (%)

-8.1%

Q1 2025	Q1 2026
44%	40%



Note: The year-over-year percentage results are preliminary and subject to revision. This data will be updated at the source if revised data become available.

INSIGHT | **All three key metrics declined in Q1 2026 compared to Q1 2025.**

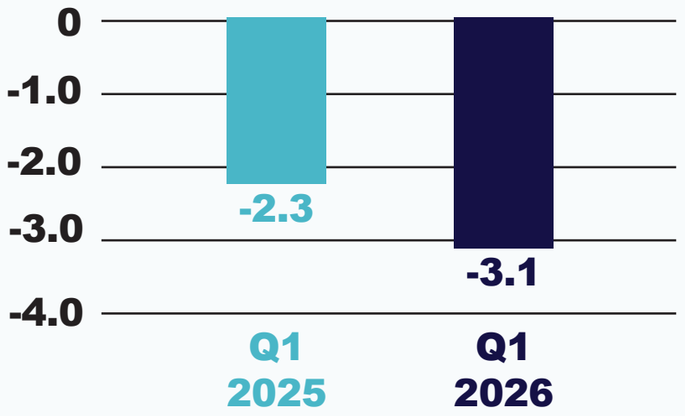
Weather

COMPARISON OF Q1 2026 vs Q1 2025

SOURCE: ENVIRONMENT CANADA

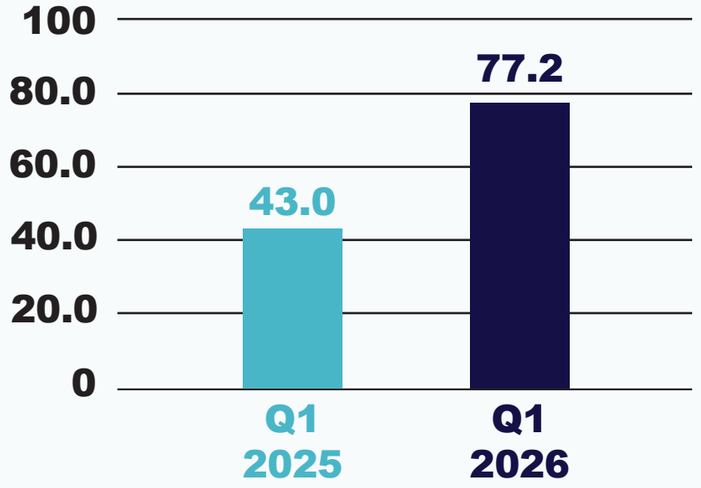
Average Temperature (°C)

-0.8°C



Precipitation (mm)

+34.2 mm



INSIGHT | Weather conditions that may influence travel activity, visitor experiences, and tourism demand.

Employment

COMPARISON OF Q1 2026 vs Q1 2025

SOURCE: STATISTICS CANADA, TABLE: 14-10-0467-01

OVERALL EMPLOYMENT IN TOURISM

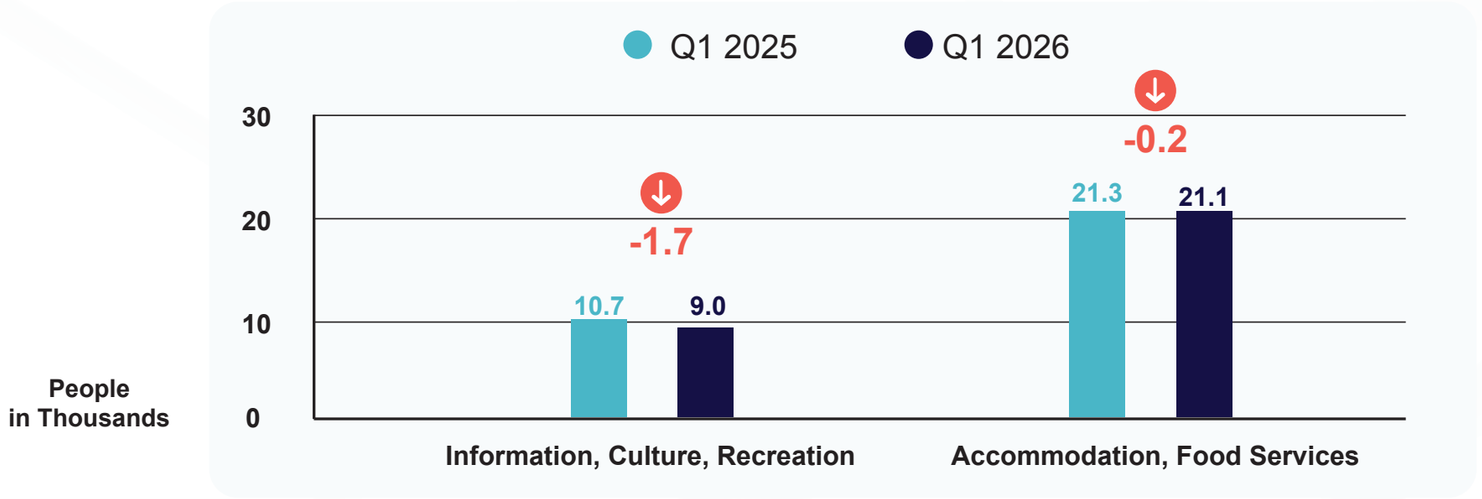
-1.9 Thousands of persons

INFORMATION, CULTURE, RECREATION

-1.7 Thousands of persons

ACCOMMODATION, FOOD SERVICES

-0.2 Thousands of persons



INSIGHT | All three key metrics declined in Q1 2026 compared to Q1 2025.

Business Counts for Niagara

COMPARISON OF DEC. 2025 vs DEC. 2024

SOURCE: STATISTICS CANADA,
CANADIAN BUSINESS COUNTS

TOTAL BUSINESSES IN TOURISM INDUSTRIES

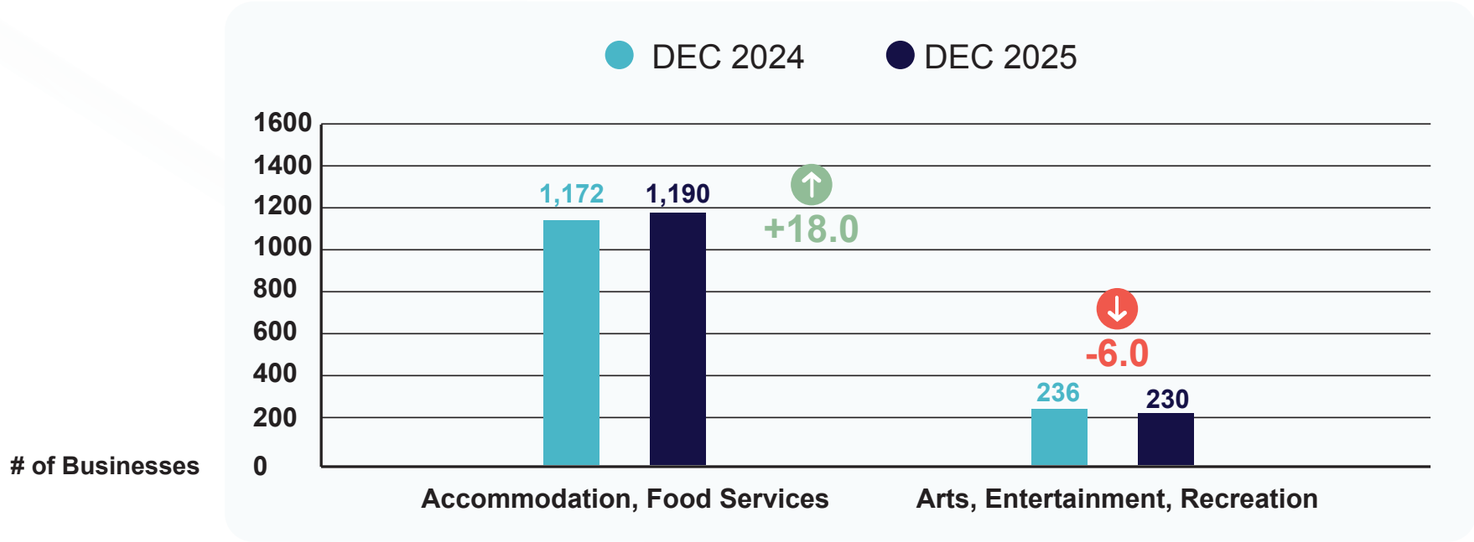
+12.0 Number of businesses

ACCOMMODATION, FOOD SERVICES

+18.0 Number of businesses

ARTS, ENTERTAINMENT, RECREATION

-6.0 Number of businesses



INSIGHT | Despite rising costs, there has been growth in the total number of tourism businesses.

Tourism Prices in Ontario

COMPARISON OF Q1 2026 vs Q1 2025

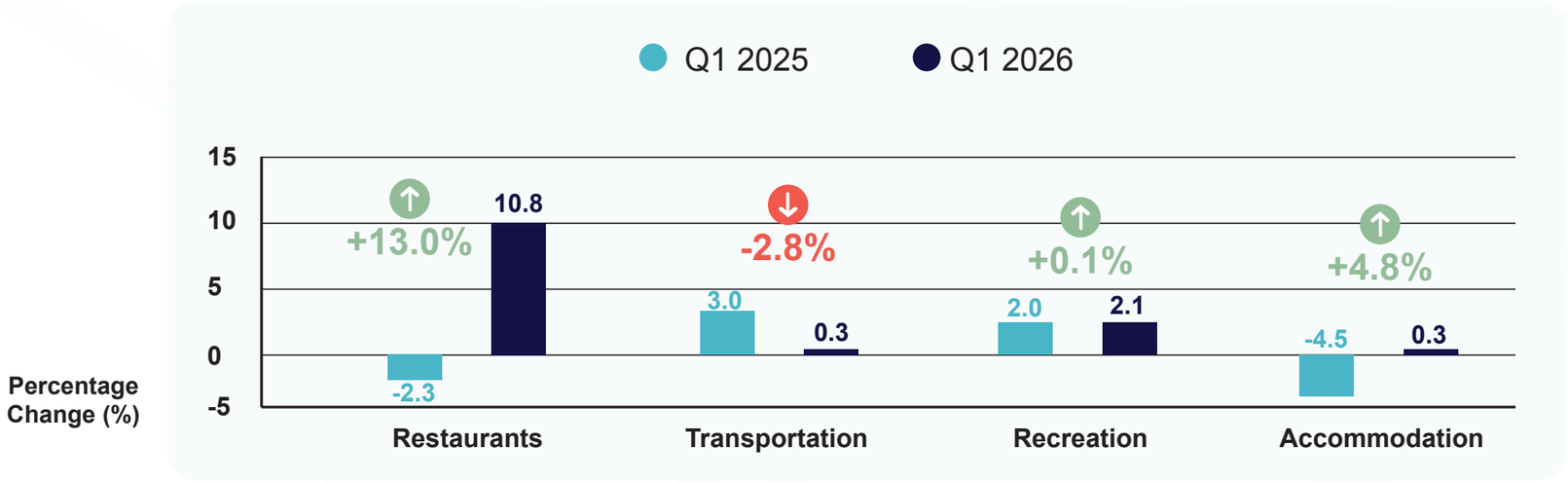
SOURCE: STATISTICS CANADA,
TABLE: 18-10-0004-01

RESTAURANTS ↑ +13.0%

TRANSPORTATION ↓ -2.8%

RECREATION ↑ +0.1%

ACCOMMODATION ↑ +4.8%



INSIGHT | Gasoline prices were lower in Q1 2026 than Q1 2025 contributing to a decrease in transportation costs.

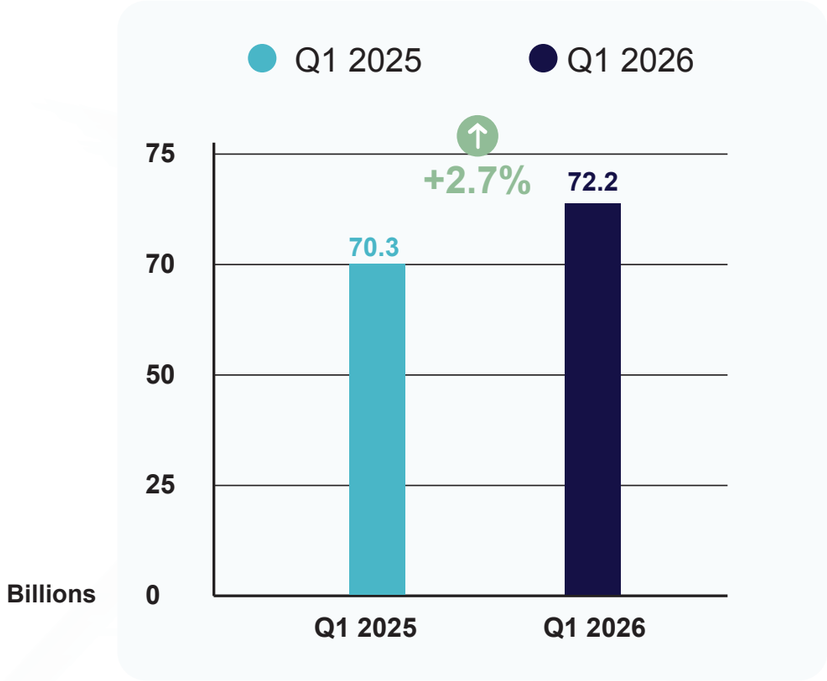
Retail Sales in Ontario

COMPARISON OF Q1 2026 vs Q1 2025

SOURCE: STATISTICS CANADA,
TABLE: 20-10-0056-01

TOTAL RETAIL SALES ACTIVITY

+2.7%



INSIGHT | Total retail sales activity in Ontario have been adjusted for inflation.

In-bound Niagara Border Crossings

COMPARISON OF Q1 2026 vs Q1 2025

SOURCE: STATISTICS CANADA,
TABLE: 24-10-0057-01

INTERNATIONAL VISITATION THROUGH NIAGARA BORDERS

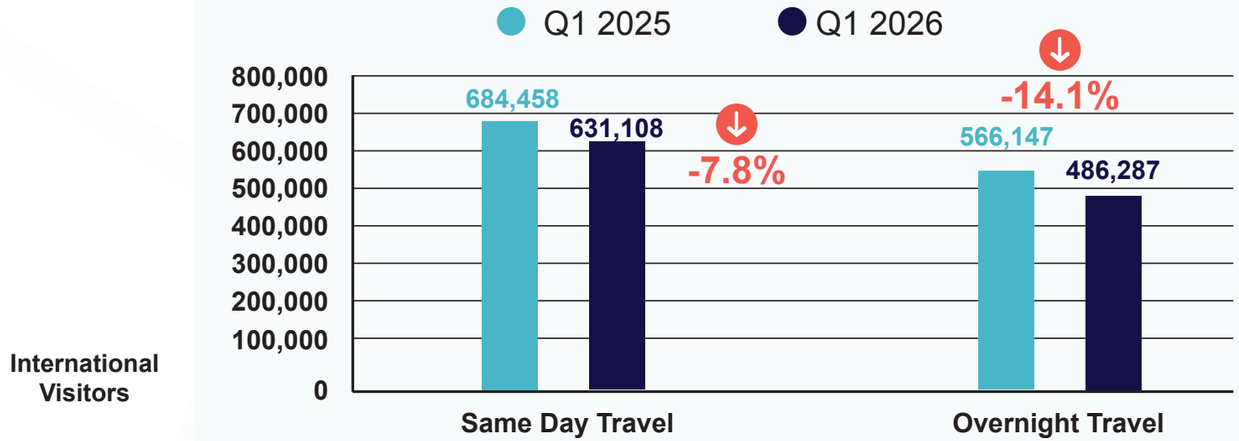
-10.7%

SAME DAY TRAVEL

-7.8%

OVERNIGHT TRAVEL

-14.1%



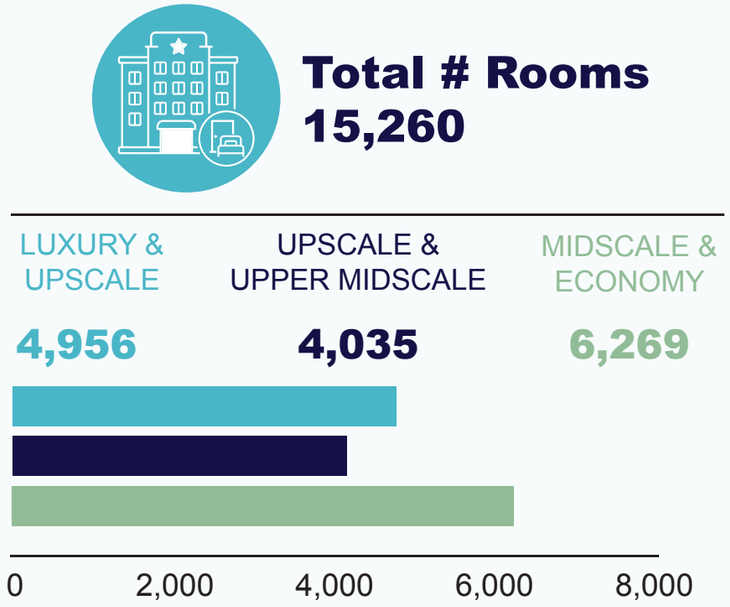
INSIGHT

In-bound Niagara border crossings were lower due to reduced Canada–U.S. leisure travel amid bilateral economic and political tension.

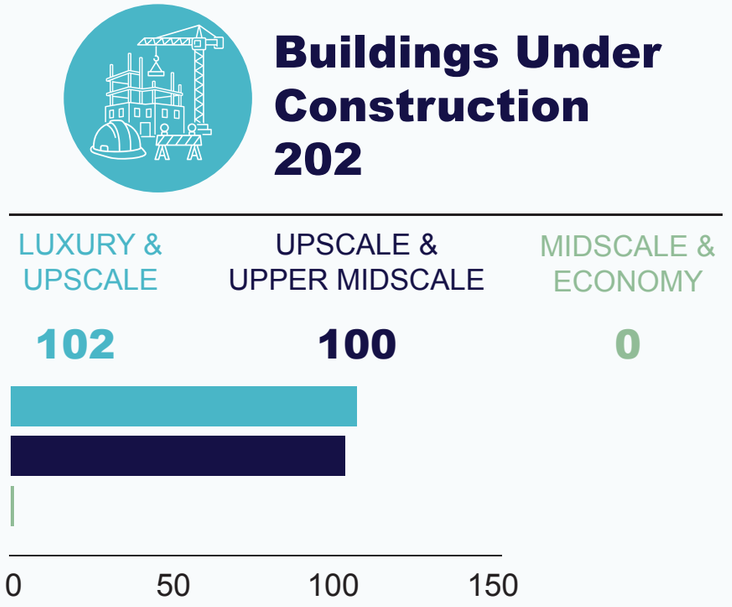
Hospitality Development

SOURCE: STR,
A COSTAR COMPANY

Total # Rooms
15,260



Buildings Under Construction
202

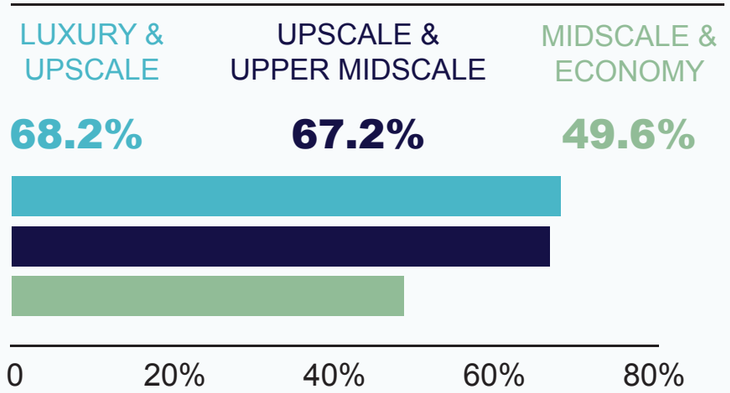


INSIGHT | **Measurement shows the total development over the past 12 months, excluding short-term rentals.**

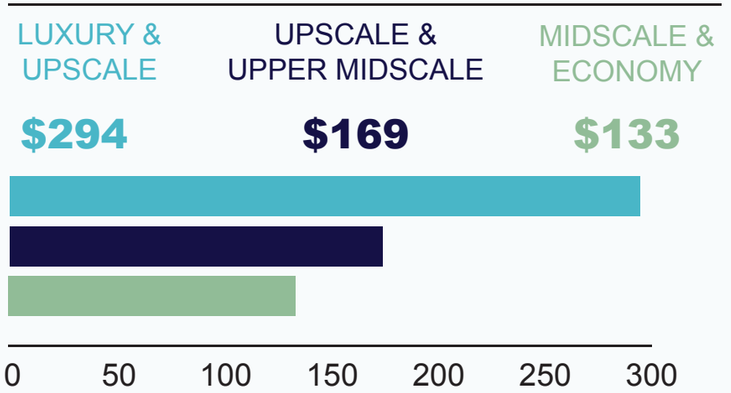
Hospitality Development

SOURCE: STR,
A COSTAR COMPANY

Occupancy Rate: 63.8%



Average Daily Rate: $222



INSIGHT | **Measurement shows the total development over the past 12 months, excluding short-term rentals.**

Hospitality Development

SOURCE: STR,
A COSTAR COMPANY

Property	Municipality	Class	Rooms	Stories	Start	Complete	Brand
The Clayfield	NOTL	Luxury	102	4	Oct. 24	July 26	Hyatt
Hampton	Lincoln	Upper Midscale	100	5	Sep. 25	Jan. 27	Hilton

INSIGHT | Known hospitality development projects currently under construction or recently completed.

Investment in Building Construction

SOURCE: STATISTICS CANADA,
TABLE: 34-10-0293-01

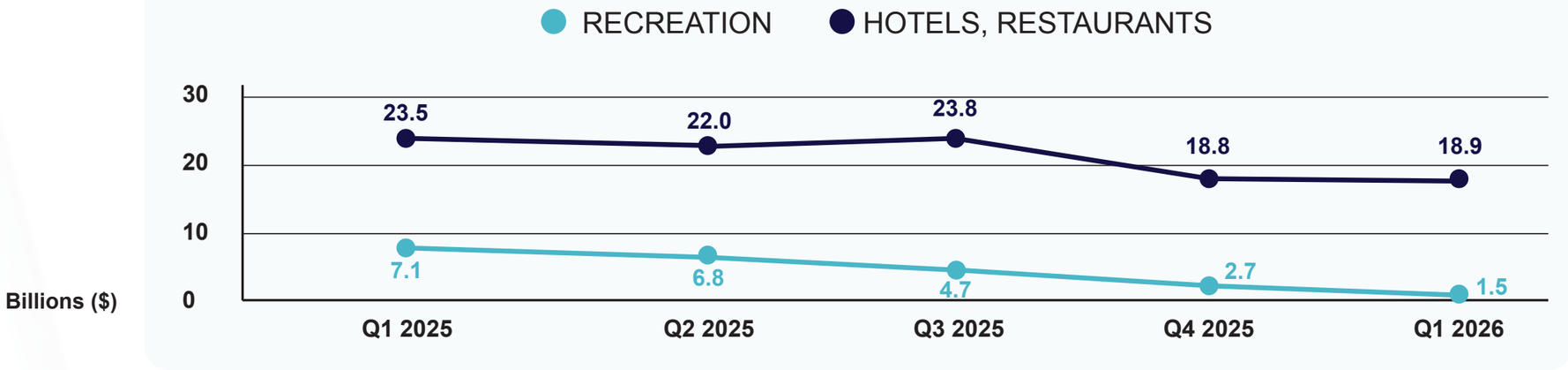
TOTAL INVESTMENT IN Q1 2025 ($ BILLIONS)
30.6

TOTAL INVESTMENT IN Q2 2025 ($ BILLIONS)
28.8

TOTAL INVESTMENT IN Q3 2025 ($ BILLIONS)
28.5

TOTAL INVESTMENT IN Q4 2025 ($ BILLIONS)
21.5

TOTAL INVESTMENT IN Q1 2026 ($ BILLIONS)
20.4



INSIGHT | **Measurements are not adjusted for seasonality.**

The Niagara Parks Commission

The Niagara Parks Commission is an operational enterprise agency governed by a Board of Commissioners and reports to the Ontario Ministry of Tourism, Culture and Gaming. Established in 1885 under the Niagara Parks Act, Niagara Parks was created to preserve and promote the significant parklands spanning 56 kilometres along the Niagara River corridor—from Fort Erie to Niagara-on-the-Lake, including Niagara Falls.

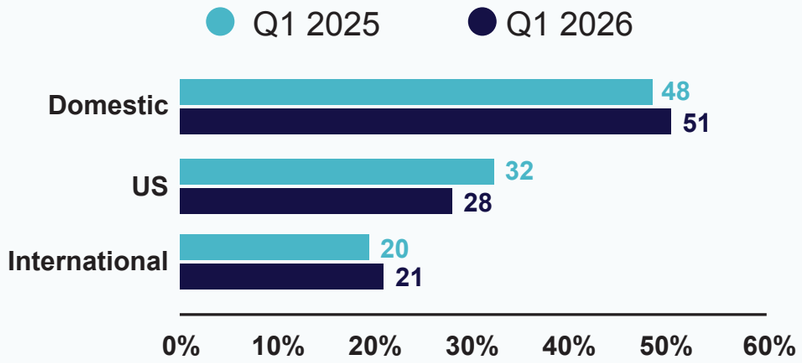
As a self-funded organization, Niagara Parks generates its own revenue by operating nature-based attractions, restaurants, golf courses, heritage sites, retail stores, parking and transportation services and more. A majority of tourists to the Niagara region will also visit Niagara Falls and likely interact with a number of Niagara Parks attractions, amenities and/or services during their visit, which underscores the importance of this data in understanding overall tourism activity in the region.

Foreign Spending by Market

COMPARISON OF Q1 2026 vs Q1 2025

SOURCE: MONERIS, NIAGARA PARKS

Total Share by Source Market



TOTAL SPEND DOMESTIC

Variance to prior year **+36%**

TOTAL SPEND US

Variance to prior year **+13%**

TOTAL SPEND INTERNATIONAL

Variance to prior year **+33%**

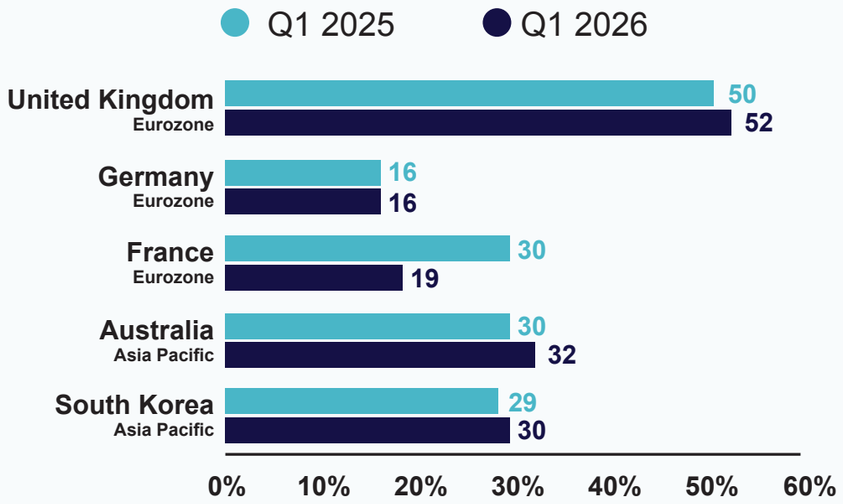
INSIGHT | **Share of total spending at Niagara Parks remains consistent, while total spend has increased.**

Top 5 International Markets (Outside United States)

COMPARISON OF Q1 2026 vs Q1 2025

SOURCE: MONERIS, NIAGARA PARKS

Share of International Spending by Zone



TOTAL SPEND UNITED KINGDOM
Variance to prior year **+43%**

TOTAL SPEND FRANCE
Variance to prior year **+20%**

TOTAL SPEND GERMANY
Variance to prior year **+38%**

TOTAL SPEND AUSTRALIA
Variance to prior year **+29%**

TOTAL SPEND SOUTH KOREA
Variance to prior year **+18%**

INSIGHT | **Share of spending by international zone remains consistent, while total spend has increased in all markets.**

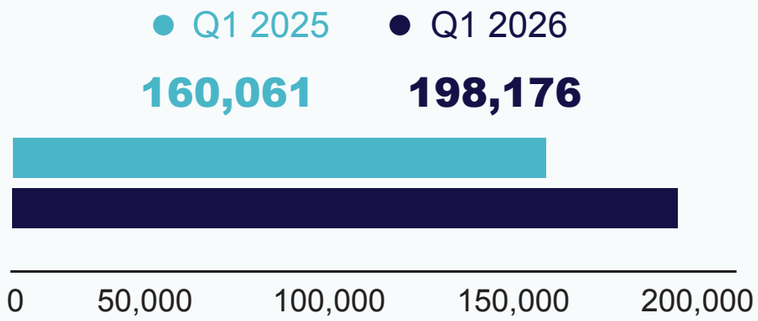
Attractions Attendance

COMPARISON OF Q1 2026 vs Q1 2025

Niagara Parks operates six unique attractions that offer guests authentic ways to experience Niagara Falls and the Niagara River corridor (Journey Behind the Falls, Niagara Takes Flight, Niagara Parks Power Station + Tunnel, White Water Walk, Whirlpool Aero Car, Butterfly Conservatory).



Total Attractions Attendance **+24%**



INSIGHT | There has been an increase in attendance in winter months over the same time last year.

WEGO Ridership

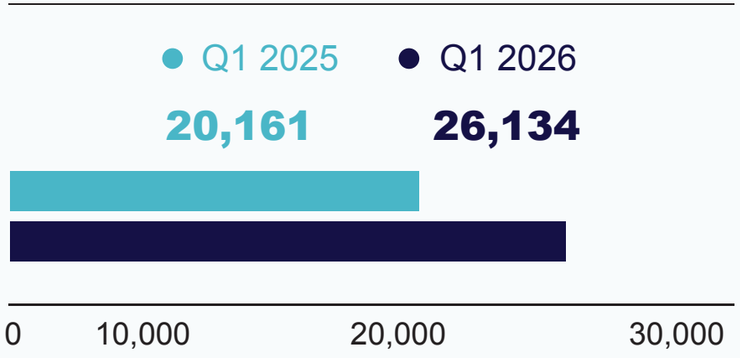
COMPARISON OF Q1 2026 vs Q1 2025

Niagara Parks also operates the WEGO bus system, which travels along the Niagara Parkway connecting Niagara Parks properties, as well as through the core tourism districts of Niagara Falls. The WEGO bus also conducts dedicated pick-ups from the Niagara Falls Bridge Street Station connecting passengers using GO Transit directly to Niagara Falls via Table Rock Centre.



Total WEGO Ridership

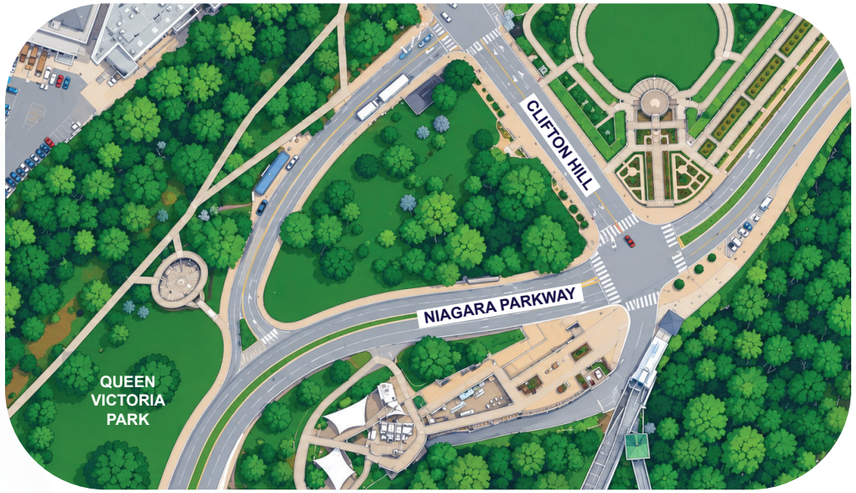
+30%



INSIGHT | **There has been an increase in ridership in winter months over the same time last year.**

Intersection Data

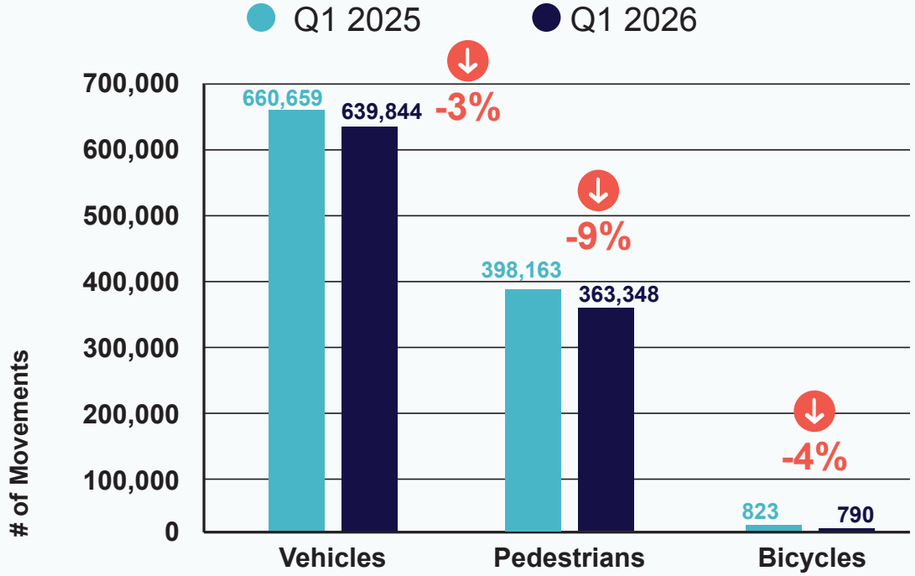
COMPARISON OF Q1 2026 vs Q1 2025



Intersection data is tracked to assess movements of vehicles, pedestrians and bicycles at key access points into Queen Victoria Park.

Clifton Hill @ Niagara Parkway

Variance to prior year



INSIGHT | **Variance to prior year has dropped in all intersection data.**

Intersection Data

COMPARISON OF Q1 2026 vs Q1 2025

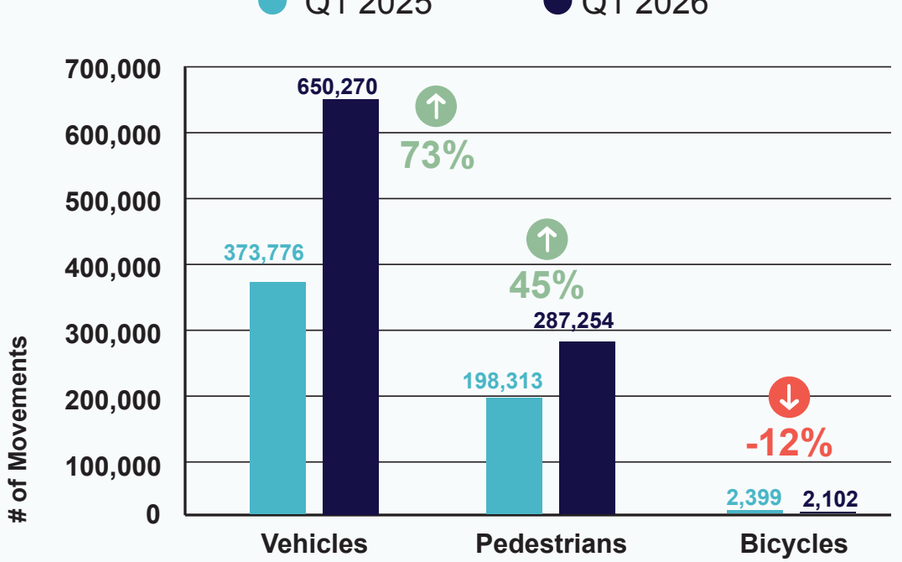


Tracking data at these intersections helps to provide an idea of how many guests are specifically visiting Niagara Falls (the landmark), beyond Niagara Parks' own operational data.

**Intersection camera was down for a period of time in Q1 2025.*

Murray Street @ Niagara Parkway

Variance to prior year



INSIGHT | **Vehicle and pedestrian traffic has increased over prior year where bicycle traffic decreased.**

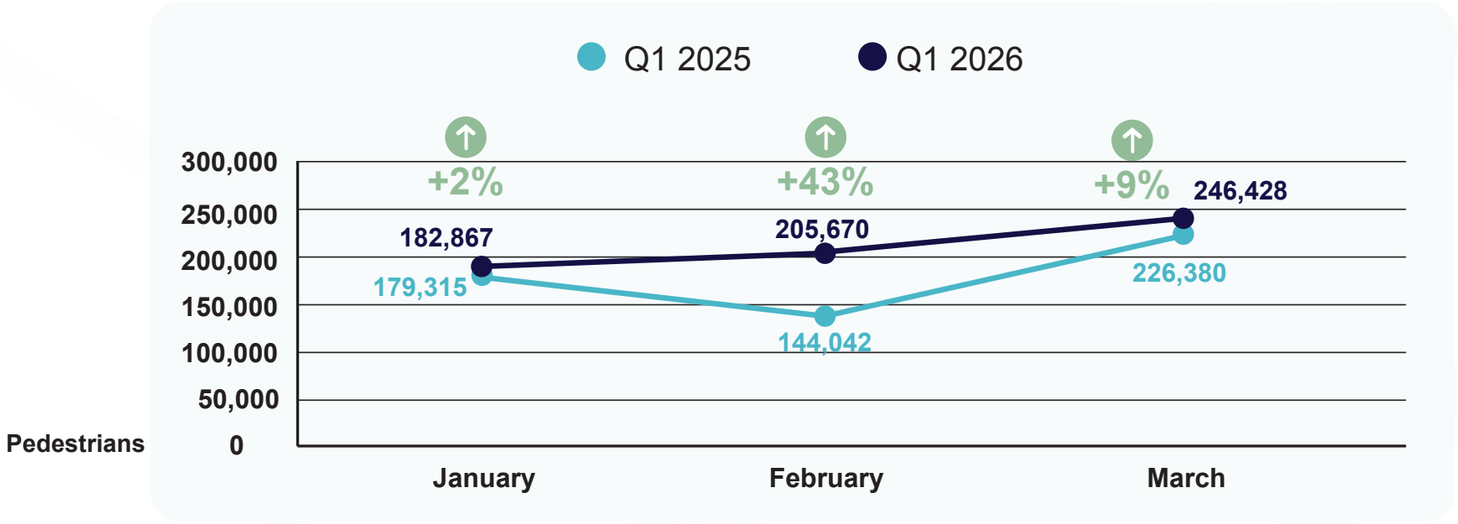
Table Rock People Counter Data

COMPARISON OF Q1 2026 vs Q1 2025

Q1 2025 TOTAL # OF PEDESTRIANS
549,737

Q1 2026 TOTAL # OF PEDESTRIANS
634,965

OVERALL GROWTH
+16%
Year over year



INSIGHT

Table Rock Centre serves as a starting point for many guests providing access to top attractions, dining, shopping as well as serves as a transit hub for the WEGO bus service.

Glossary of Terms

Accommodation: Hotels, motels, resorts, inns, bed and breakfasts, and other paid overnight lodging.

ADR (Average Daily Rate): The average revenue earned for each occupied room during a specific period.
It is calculated by dividing room revenue by the number of rooms sold.

Available Listings: The number of short-term rental properties that are available to be booked during the reporting period.

Booked Listings: The number of short-term rental properties that received at least one booking during the reporting period.

Building Class: A classification of accommodation properties based on quality, amenities, service level, and market positioning (e.g., Luxury, Upscale, Midscale, Economy).

Consumer Price Index (CPI): A measure of changes in the prices consumers pay for goods and services over time.
Tourism-related CPI categories include restaurants, accommodations, recreation, and transportation.

Excursionist (Same-Day Visitor): A visitor who travels to a destination but does not stay overnight.

Food and Beverage Expenditures: Visitor spending at restaurants, cafés, bars, wineries, breweries, grocery stores, and other food service establishments.

Hospitality Development: Investment and construction activity related to hotels and other accommodation properties, including new developments and expansions.

Glossary of Terms

International Visitor: A visitor arriving from countries other than Canada or the United States.

Investment in Building Construction: The value of construction activity in unadjusted constant dollars for tourism-related buildings such as hotels, restaurants, and recreation facilities.

Mean Temperature: The average outdoor temperature over the reporting period.

Nights (Visitor Nights): The total number of nights spent by visitors in a destination. One visitor staying three nights equals three visitor nights.

Nights per Trip: The average length of stay. It is calculated by dividing total visitor nights by total trips.

Occupancy (%): The percentage of available accommodation rooms that were occupied during a specific period.

Occupancy Rate (Short-Term Rentals): The percentage of available short-term rental nights that were booked by guests.

Ontario Retail Sales: The total value of retail purchases made in Ontario unadjusted for seasonality. Although not a tourism measure, it provides context for consumer spending trends.

Overseas Visitors: Visitors arriving from countries outside Canada and the United States.

Glossary of Terms

Precipitation: The total amount of rain, snow, or other forms of precipitation received during the reporting period, measured in millimetres.

Q1, Q2, Q3 and Q4: Quarterly periods based on the calendar year. Q1 covers January through March, Q2 covers April through June, Q3 covers July through September, and Q4 covers October through December.

Recreation and Entertainment Expenditures: Visitor spending on attractions, museums, parks, sporting events, festivals, entertainment venues, and recreational activities.

Retail Expenditures: Visitor spending on shopping, including clothing, gifts, souvenirs, groceries, and other retail purchases.

RevPAR (Revenue per Available Room): A hotel performance metric that combines occupancy and room rates. It is calculated by multiplying ADR by occupancy, or by dividing total room revenue by the total number of available rooms.

Revenue (Short-Term Rentals): Total accommodation revenue earned by short-term rental properties during the reporting period.

Rooms: The total number of guest rooms available within a hotel or accommodation market.

Short-Term Rental (STR): Private accommodation rented for short stays, typically fewer than 30 consecutive days, such as vacation homes or apartments listed on online rental platforms.

Glossary of Terms

Tourism Business Counts: The number of employer businesses with payroll remittances operating in tourism-related industries, including accommodation, food services, arts, entertainment, and recreation.

Tourism Employment: The number of people employed in tourism-related industries, including accommodation, food services, recreation, arts, and cultural activities.

Transportation Expenditures: Visitor spending on transportation services, including fuel, vehicle rentals, public transit, taxis, rideshare services, parking, and air or rail travel within the destination.

Trip: A journey away from a traveller's usual place of residence for leisure, business, or another tourism purpose. A trip begins when the traveller leaves home and ends when they return. A single trip may include visits to multiple destinations.

Visitor: A person who travels outside their usual place of residence to a destination for leisure, business, or another tourism purpose, without taking up permanent residence or employment at the destination. A visitor may be a same-day visitor or an overnight visitor.

Visitor Expenditures: The total amount spent by visitors during their trip, including accommodation, food and beverage, transportation, recreation, entertainment, and retail purchases.

Visitor Origin: The geographic location where visitors begin their trip (e.g., Ontario, Rest of Canada, United States, or Overseas).

Year-over-Year (YoY) Change: The percentage increase or decrease in a metric compared with the same period in the previous year.

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