



TRENDS IN THE CANADIAN
HOTEL INDUSTRY

National Market Report

JANUARY 2025

Report of rooms operations by location

MONTH OF JANUARY 2025*

Location	Occupancy Percentage			Average Daily Rate			Revenue Per Available Room		
	2025	2024	**Point Change	2025	2024	Variance	2025	2024	Variance
ATLANTIC CANADA	40.2%	40.2%	-0.1	\$148.88	\$142.29	4.6%	\$59.79	\$57.26	4.4%
Newfoundland	36.1%	39.9%	-3.8	\$136.44	\$128.09	6.5%	\$49.25	\$51.16	-3.7%
St. John's	35.8%	40.3%	-4.5	\$134.19	\$125.10	7.3%	\$48.04	\$50.36	-4.6%
Prince Edward Island	29.5%	27.1%	2.4	\$161.13	\$153.11	5.2%	\$47.58	\$41.49	14.7%
Nova Scotia	43.5%	42.6%	0.9	\$155.95	\$148.67	4.9%	\$67.89	\$63.40	7.1%
Halifax/Dartmouth	44.1%	44.4%	-0.3	\$162.27	\$155.65	4.3%	\$71.55	\$69.16	3.4%
Other Nova Scotia	42.4%	39.1%	3.3	\$142.35	\$132.99	7.0%	\$60.31	\$52.01	16.0%
New Brunswick	40.1%	39.9%	0.2	\$140.03	\$136.66	2.5%	\$56.10	\$54.51	2.9%
Moncton	41.2%	45.4%	-4.3	\$142.78	\$142.09	0.5%	\$58.80	\$64.58	-9.0%
Other New Brunswick	39.5%	37.0%	2.4	\$138.53	\$133.25	4.0%	\$54.68	\$49.37	10.8%
CENTRAL CANADA	50.8%	50.6%	0.2	\$183.87	\$178.24	3.2%	\$93.46	\$90.25	3.6%
Quebec	48.6%	48.5%	0.2	\$203.71	\$192.95	5.6%	\$99.07	\$93.49	6.0%
Greater Quebec City	51.2%	49.3%	1.9	\$200.57	\$186.42	7.6%	\$102.63	\$91.92	11.7%
Other Quebec	49.9%	47.2%	2.6	\$221.06	\$211.14	4.7%	\$110.25	\$99.73	10.5%
Greater Montreal	47.5%	49.0%	-1.5	\$195.18	\$186.03	4.9%	\$92.72	\$91.09	1.8%
Downtown Montreal	42.4%	43.0%	-0.6	\$202.98	\$191.46	6.0%	\$86.08	\$82.40	4.5%
Montreal Airport/Laval	57.5%	63.8%	-6.3	\$194.69	\$188.98	3.0%	\$112.03	\$120.61	-7.1%
Ontario	51.6%	51.4%	0.2	\$177.37	\$173.34	2.3%	\$91.43	\$89.09	2.6%
Greater Toronto Area (GTA)	58.1%	60.0%	-1.8	\$197.21	\$192.09	2.7%	\$114.61	\$115.17	-0.5%
Downtown Toronto	52.9%	52.9%	0.0	\$263.20	\$253.62	3.8%	\$139.29	\$134.25	3.7%
Toronto Airport	69.8%	74.3%	-4.5	\$184.34	\$187.86	-1.9%	\$128.60	\$139.54	-7.8%
GTA West	58.0%	61.4%	-3.4	\$153.44	\$152.15	0.8%	\$88.98	\$93.44	-4.8%
GTA East/North	58.5%	59.2%	-0.8	\$155.58	\$151.03	3.0%	\$90.97	\$89.46	1.7%
Eastern Ontario	40.5%	44.2%	-3.7	\$151.14	\$143.22	5.5%	\$61.16	\$63.29	-3.4%
Kingston	44.3%	50.5%	-6.2	\$156.75	\$151.99	3.1%	\$69.46	\$76.78	-9.5%
Other Eastern Ontario	38.7%	41.9%	-3.2	\$148.14	\$139.36	6.3%	\$57.29	\$58.37	-1.9%
Ottawa	54.8%	47.0%	7.8	\$182.50	\$175.02	4.3%	\$99.97	\$82.25	21.5%
Downtown Ottawa	52.7%	44.6%	8.1	\$191.87	\$192.50	-0.3%	\$101.15	\$85.90	17.7%
Ottawa West	61.9%	52.3%	9.6	\$174.76	\$159.11	9.8%	\$108.25	\$83.21	30.1%
Ottawa East	44.9%	42.9%	2.0	\$163.98	\$150.95	8.6%	\$73.63	\$64.83	13.6%
Southern Ontario	45.1%	44.9%	0.2	\$146.74	\$146.51	0.2%	\$66.17	\$65.75	0.6%
London	57.0%	53.7%	3.3	\$148.40	\$147.28	0.8%	\$84.58	\$79.06	7.0%
Windsor	57.7%	64.8%	-7.1	\$139.57	\$137.65	1.4%	\$80.50	\$89.17	-9.7%
Kitchener/Waterloo/Cambridge/Guelph	55.3%	51.8%	3.5	\$165.68	\$153.15	8.2%	\$91.64	\$79.38	15.4%
Hamilton/Brantford	44.2%	42.6%	1.6	\$145.78	\$140.84	3.5%	\$64.47	\$60.02	7.4%
Niagara Falls	36.8%	36.9%	-0.1	\$127.64	\$143.52	-11.1%	\$46.98	\$52.95	-11.3%
Other Niagara Region	42.9%	42.0%	1.0	\$169.98	\$157.62	7.8%	\$72.99	\$66.15	10.3%
Other Southern Ontario	40.8%	42.6%	-1.8	\$158.96	\$150.17	5.8%	\$64.90	\$63.97	1.4%
Central Ontario	44.1%	41.6%	2.5	\$173.80	\$170.50	1.9%	\$76.62	\$70.86	8.1%
North Eastern Ontario	49.1%	46.9%	2.2	\$151.37	\$147.36	2.7%	\$74.34	\$69.15	7.5%
North Bay	49.1%	44.0%	5.1	\$129.58	\$125.10	3.6%	\$63.61	\$55.07	15.5%
Sudbury	50.3%	49.3%	1.0	\$152.36	\$151.97	0.3%	\$76.63	\$74.98	2.2%
North Central Ontario	45.5%	44.7%	0.8	\$135.64	\$124.56	8.9%	\$61.65	\$55.65	10.8%
Sault Ste. Marie	45.5%	44.7%	0.8	\$135.64	\$124.56	8.9%	\$61.65	\$55.65	10.8%
North Western Ontario	55.1%	50.8%	4.3	\$180.31	\$169.02	6.7%	\$99.32	\$85.86	15.7%
Thunder Bay	56.3%	48.3%	8.0	\$181.90	\$172.95	5.2%	\$102.41	\$83.49	22.7%

* Based on the operating results of 255,145 rooms (unweighted data)

** Please note that the variance between current and previous year occupancy is reported as a point change and not as a percentage variance.

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Report of rooms operations by location

MONTH OF JANUARY 2025*

Location	Occupancy Percentage			Average Daily Rate			Revenue Per Available Room		
	2025	2024	**Point Change	2025	2024	Variance	2025	2024	Variance
WESTERN CANADA	49.7%	48.8%	1.0	\$181.40	\$172.36	5.2%	\$90.22	\$84.04	7.3%
Manitoba	53.4%	58.1%	-4.8	\$161.10	\$156.66	2.8%	\$85.95	\$91.09	-5.6%
Winnipeg	54.7%	61.6%	-6.9	\$164.74	\$160.06	2.9%	\$90.14	\$98.63	-8.6%
Brandon	50.7%	52.2%	-1.4	\$162.05	\$158.01	2.6%	\$82.22	\$82.43	-0.3%
Other Manitoba	50.6%	50.5%	0.0	\$147.89	\$142.14	4.0%	\$74.77	\$71.81	4.1%
Saskatchewan	48.9%	44.7%	4.2	\$140.60	\$132.46	6.1%	\$68.78	\$59.23	16.1%
Regina	44.4%	40.5%	3.9	\$130.94	\$127.76	2.5%	\$58.12	\$51.74	12.3%
Saskatoon	54.7%	48.7%	6.0	\$151.77	\$139.33	8.9%	\$82.99	\$67.82	22.4%
Other Saskatchewan	47.9%	44.8%	3.1	\$136.42	\$129.30	5.5%	\$65.34	\$57.97	12.7%
Alberta (excl. Alta Resorts)	46.2%	45.0%	1.2	\$140.88	\$136.60	3.1%	\$65.08	\$61.52	5.8%
Calgary	45.8%	48.0%	-2.3	\$150.60	\$149.79	0.5%	\$68.93	\$71.94	-4.2%
Calgary Airport	49.9%	57.3%	-7.4	\$137.86	\$140.51	-1.9%	\$68.77	\$80.45	-14.5%
Downtown Calgary	38.3%	40.2%	-1.9	\$188.40	\$181.48	3.8%	\$72.16	\$72.96	-1.1%
Calgary Northwest	50.3%	43.7%	6.6	\$120.61	\$116.46	3.6%	\$60.72	\$50.95	19.2%
Calgary South	50.2%	45.9%	4.2	\$132.92	\$134.59	-1.2%	\$66.66	\$61.79	7.9%
Edmonton	50.6%	45.0%	5.5	\$141.52	\$132.94	6.4%	\$71.54	\$59.86	19.5%
Downtown Edmonton	44.3%	40.3%	4.0	\$191.63	\$174.60	9.8%	\$84.88	\$70.38	20.6%
Edmonton South	52.7%	45.7%	7.1	\$124.51	\$117.54	5.9%	\$65.64	\$53.66	22.3%
Edmonton West	51.9%	48.1%	3.8	\$137.63	\$130.95	5.1%	\$71.38	\$62.98	13.3%
Other Alberta	43.5%	42.9%	0.6	\$133.06	\$128.74	3.4%	\$57.91	\$55.28	4.8%
Lethbridge	46.2%	40.8%	5.4	\$125.29	\$122.36	2.4%	\$57.84	\$49.91	15.9%
Red Deer	42.2%	41.6%	0.7	\$124.91	\$114.39	9.2%	\$52.73	\$47.54	10.9%
Other Alberta Communities	43.3%	44.0%	-0.7	\$136.39	\$131.98	3.3%	\$59.05	\$58.02	1.8%
Alberta Resorts	44.2%	38.4%	5.7	\$360.46	\$321.07	12.3%	\$159.19	\$123.40	29.0%
British Columbia	53.5%	53.0%	0.6	\$217.60	\$205.37	6.0%	\$116.50	\$108.82	7.1%
Greater Vancouver	61.3%	60.3%	1.0	\$211.64	\$199.81	5.9%	\$129.77	\$120.42	7.8%
Airport (Richmond)	71.2%	71.7%	-0.5	\$186.69	\$186.23	0.2%	\$132.83	\$133.44	-0.5%
Downtown Vancouver	59.6%	55.4%	4.3	\$243.05	\$226.65	7.2%	\$144.93	\$125.46	15.5%
Langley/Surrey	55.3%	57.9%	-2.6	\$163.81	\$147.56	11.0%	\$90.54	\$85.46	5.9%
Other Vancouver	55.7%	61.3%	-5.6	\$179.75	\$176.67	1.7%	\$100.04	\$108.27	-7.6%
Vancouver Island	47.0%	45.2%	1.8	\$167.53	\$157.33	6.5%	\$78.73	\$71.11	10.7%
Campbell River	50.9%	57.9%	-7.0	\$123.52	\$124.10	-0.5%	\$62.90	\$71.86	-12.5%
Greater Victoria	49.0%	45.6%	3.4	\$177.21	\$163.20	8.6%	\$86.88	\$74.42	16.7%
Nanaimo	44.2%	42.9%	1.3	\$141.63	\$141.79	-0.1%	\$62.57	\$60.81	2.9%
Parksville/Qualicum Beach	34.1%	37.6%	-3.5	\$153.17	\$152.56	0.4%	\$52.31	\$57.38	-8.8%
Other Vancouver Island	48.5%	46.7%	1.8	\$172.70	\$162.43	6.3%	\$83.82	\$75.90	10.4%
Whistler Resort Area	75.1%	75.3%	-0.2	\$597.12	\$601.13	-0.7%	\$448.62	\$452.58	-0.9%
Other British Columbia	44.0%	44.8%	-0.8	\$153.15	\$140.40	9.1%	\$67.37	\$62.95	7.0%
Abbotsford/Chilliwack	53.0%	67.2%	-14.2	\$156.08	\$137.88	13.2%	\$82.79	\$92.70	-10.7%
Kamloops	42.9%	43.6%	-0.7	\$128.20	\$120.66	6.2%	\$55.04	\$52.61	4.6%
Kelowna	43.4%	43.0%	0.4	\$144.13	\$131.27	9.8%	\$62.53	\$56.47	10.7%
Penticton	21.5%	22.3%	-0.8	\$117.46	\$111.46	5.4%	\$25.23	\$24.81	1.7%
Prince George	47.7%	51.6%	-3.9	\$149.57	\$126.91	17.9%	\$71.42	\$65.50	9.0%
Other B.C. Communities	45.1%	44.3%	0.8	\$162.69	\$151.58	7.3%	\$73.30	\$67.10	9.2%
Yukon	40.7%	46.0%	-5.4	\$158.19	\$157.11	0.7%	\$64.30	\$72.32	-11.1%
CANADA	49.6%	49.0%	0.6	\$180.69	\$173.36	4.2%	\$89.54	\$84.94	5.4%

* Based on the operating results of 255,145 rooms (unweighted data)

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Regional report of rooms operations by property size, type and price level
MONTH OF JANUARY 2025*

ATLANTIC							CENTRAL					
	Occupancy Percentage			Average Daily Rates			Occupancy Percentage			Average Daily Rates		
	2025	2024	**Point Change	2025	2024	Variance	2025	2024	**Point Change	2025	2024	Variance
Property Size												
Under 50 rooms	30.1%	28.1%	2.0	\$132.89	\$121.53	9.4%	38.6%	40.8%	-2.2	\$157.60	\$150.58	4.7%
50-75 rooms	39.8%	35.4%	4.4	\$129.97	\$125.37	3.7%	45.2%	43.0%	2.1	\$144.57	\$138.05	4.7%
76-125 rooms	43.0%	43.7%	-0.7	\$147.44	\$143.46	2.8%	51.5%	51.8%	-0.3	\$161.32	\$153.37	5.2%
126-200 rooms	39.3%	44.6%	-5.4	\$156.11	\$146.02	6.9%	54.9%	53.9%	1.0	\$167.97	\$167.45	0.3%
201-500 rooms	37.2%	31.9%	5.3	\$155.80	\$147.29	5.8%	50.4%	49.4%	1.0	\$211.88	\$204.68	3.5%
Over 500 rooms	N/A	N/A	N/A	N/A	N/A	N/A	49.7%	52.5%	-2.8	\$238.42	\$227.15	5.0%
Total	40.2%	40.2%	-0.1	\$148.88	\$142.29	4.6%	50.8%	50.6%	0.2	\$183.87	\$178.24	3.2%
Property Type												
Limited Service	43.6%	43.7%	-0.1	\$145.59	\$141.14	3.2%	48.6%	48.2%	0.4	\$145.73	\$141.84	2.7%
Full Service	37.6%	37.6%	0.0	\$151.19	\$141.12	7.1%	51.0%	51.1%	0.0	\$198.16	\$193.00	2.7%
Suite Hotel	52.3%	54.0%	-1.7	\$160.31	\$163.22	-1.8%	58.7%	58.8%	-0.1	\$184.20	\$173.62	6.1%
Resort	N/A	N/A	N/A	N/A	N/A	N/A	47.4%	45.0%	2.4	\$286.71	\$280.54	2.2%
Total	40.2%	40.2%	-0.1	\$148.88	\$142.29	4.6%	50.8%	50.6%	0.2	\$183.87	\$178.24	3.2%
Price Level												
Budget	32.7%	29.9%	2.8	\$126.33	\$121.60	3.9%	45.4%	43.1%	2.3	\$119.08	\$118.69	0.3%
Mid-Price	41.2%	42.2%	-1.1	\$149.36	\$143.24	4.3%	52.0%	52.4%	-0.4	\$173.66	\$168.51	3.1%
Upscale	39.5%	29.7%	9.8	\$184.38	\$171.28	7.6%	49.2%	47.7%	1.4	\$273.20	\$261.78	4.4%
Total	40.2%	40.2%	-0.1	\$148.88	\$142.29	4.6%	50.8%	50.6%	0.2	\$183.87	\$178.24	3.2%
WESTERN							CANADA					
	Occupancy Percentage			Average Daily Rates			Occupancy Percentage			Average Daily Rates		
	2025	2024	**Point Change	2025	2024	Variance	2025	2024	**Point Change	2025	2024	Variance
Property Size												
Under 50 rooms	40.5%	40.4%	0.1	\$121.09	\$117.68	2.9%	39.4%	40.0%	-0.6	\$134.67	\$129.44	4.0%
50-75 rooms	45.7%	45.7%	0.0	\$131.97	\$127.02	3.9%	45.0%	43.7%	1.3	\$136.99	\$131.25	4.4%
76-125 rooms	50.0%	50.2%	-0.2	\$151.42	\$144.82	4.6%	50.0%	50.3%	-0.2	\$155.45	\$148.39	4.8%
126-200 rooms	51.2%	50.0%	1.2	\$167.00	\$155.47	7.4%	51.8%	51.3%	0.6	\$166.73	\$160.45	3.9%
201-500 rooms	50.6%	47.8%	2.8	\$227.13	\$222.82	1.9%	49.7%	47.6%	2.1	\$216.28	\$210.57	2.7%
Over 500 rooms	55.5%	54.0%	1.4	\$373.57	\$344.22	8.5%	51.2%	52.9%	-1.7	\$275.09	\$257.13	7.0%
Total	49.7%	48.7%	1.0	\$181.39	\$172.36	5.2%	49.6%	49.0%	0.6	\$180.69	\$173.36	4.2%
Property Type												
Limited Service	47.6%	47.8%	-0.2	\$134.66	\$129.70	3.8%	47.7%	47.6%	0.0	\$140.13	\$135.59	3.4%
Full Service	50.6%	48.5%	2.1	\$183.18	\$173.37	5.7%	49.9%	49.0%	0.9	\$189.34	\$182.01	4.0%
Suite Hotel	58.5%	60.6%	-2.1	\$187.88	\$179.80	4.5%	58.5%	59.2%	-0.8	\$184.69	\$175.42	5.3%
Resort	50.6%	47.5%	3.1	\$427.00	\$407.00	4.9%	48.1%	45.3%	2.8	\$373.02	\$361.05	3.3%
Total	49.7%	48.7%	1.0	\$181.39	\$172.36	5.2%	49.6%	49.0%	0.6	\$180.69	\$173.36	4.2%
Price Level												
Budget	42.7%	43.9%	-1.3	\$115.96	\$109.88	5.5%	43.2%	42.6%	0.6	\$117.86	\$114.08	3.3%
Mid-Price	50.5%	49.4%	1.1	\$159.46	\$151.53	5.2%	50.4%	50.2%	0.2	\$165.67	\$159.19	4.1%
Upscale	53.0%	50.5%	2.5	\$343.93	\$336.06	2.3%	50.6%	48.5%	2.1	\$303.97	\$294.41	3.2%
Total	49.7%	48.7%	1.0	\$181.39	\$172.36	5.2%	49.6%	49.0%	0.6	\$180.69	\$173.36	4.2%

* Based on the operating results of 255,145 rooms (unweighted data)

** Please note that the variance between current and previous year occupancy is reported as a point change and not as a percentage variance.

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