

January 2021

NATIONAL MARKET REPORT

TRENDS IN THE CANADIAN HOTEL INDUSTRY



REPORT OF ROOMS OPERATIONS BY LOCATION MONTH OF JANUARY 2021*

Location	Occupancy Percentage			Average Daily Rate			Revenue Per Available Room		
	2021	2020	**Point Change	2021	2020	Variance	2021	2020	Variance
ATLANTIC CANADA	18.1%	39.6%	-21.5	\$91.69	\$120.79	-24.1%	\$16.59	\$47.88	-65.4%
NEWFOUNDLAND	19.2%	32.8%	-13.6	\$93.78	\$114.60	-18.2%	\$17.98	\$37.55	-52.1%
St. John's	18.4%	32.2%	-13.7	\$90.22	\$111.43	-19.0%	\$16.60	\$35.83	-53.7%
PRINCE EDWARD ISLAND	19.7%	28.8%	-9.1	\$89.03	\$117.76	-24.4%	\$17.51	\$33.92	-48.4%
NOVA SCOTIA	22.4%	43.7%	-21.3	\$91.27	\$124.43	-26.7%	\$20.44	\$54.33	-62.4%
Halifax/Dartmouth	19.8%	47.5%	-27.7	\$88.71	\$128.86	-31.2%	\$17.54	\$61.22	-71.3%
Other Nova Scotia	28.8%	35.0%	-6.1	\$95.58	\$110.79	-13.7%	\$27.54	\$38.73	-28.9%
NEW BRUNSWICK	13.2%	40.1%	-26.9	\$90.24	\$116.54	-22.6%	\$11.88	\$46.73	-74.6%
Moncton	11.8%	45.3%	-33.4	\$83.86	\$121.50	-31.0%	\$9.90	\$54.99	-82.0%
Other New Brunswick	13.9%	37.3%	-23.4	\$93.27	\$113.27	-17.7%	\$12.99	\$42.24	-69.2%
CENTRAL CANADA	21.2%	53.3%	-32.1	\$99.92	\$148.58	-32.7%	\$21.20	\$79.21	-73.2%
QUEBEC	13.9%	51.3%	-37.4	\$118.60	\$156.64	-24.3%	\$16.47	\$80.39	-79.5%
Greater Quebec City	9.8%	48.1%	-38.3	\$113.33	\$142.49	-20.5%	\$11.12	\$68.58	-83.8%
Other Quebec	18.8%	49.9%	-31.1	\$128.82	\$164.69	-21.8%	\$24.20	\$82.15	-70.5%
Greater Montreal	12.7%	52.8%	-40.2	\$112.18	\$156.04	-28.1%	\$14.19	\$82.46	-82.8%
Downtown Montreal	6.8%	47.3%	-40.5	\$118.41	\$165.89	-28.6%	\$8.00	\$78.41	-89.8%
Montreal Airport/Laval	21.7%	66.2%	-44.5	\$111.23	\$148.33	-25.0%	\$24.09	\$98.20	-75.5%
ONTARIO	23.7%	54.0%	-30.3	\$96.27	\$146.12	-34.1%	\$22.80	\$78.87	-71.1%
Greater Toronto Area (GTA)	24.3%	61.6%	-37.2	\$94.62	\$163.82	-42.2%	\$23.04	\$100.83	-77.2%
Downtown Toronto	10.9%	59.7%	-48.8	\$132.28	\$210.58	-37.2%	\$14.37	\$125.66	-88.6%
Toronto Airport	24.6%	74.8%	-50.2	\$93.49	\$156.85	-40.4%	\$23.02	\$117.38	-80.4%
GTA West	28.9%	61.4%	-32.5	\$83.70	\$129.18	-35.2%	\$24.20	\$79.36	-69.5%
GTA East/North	38.9%	55.7%	-16.7	\$88.97	\$131.87	-32.5%	\$34.62	\$73.40	-52.8%
Eastern Ontario	26.8%	45.1%	-18.3	\$93.97	\$120.66	-22.1%	\$25.21	\$54.42	-53.7%
Kingston	28.6%	47.3%	-18.7	\$75.57	\$123.92	-39.0%	\$21.62	\$58.56	-63.1%
Other Eastern Ontario	25.9%	44.0%	-18.1	\$104.23	\$118.88	-12.3%	\$27.02	\$52.32	-48.3%
Ottawa	19.3%	57.0%	-37.8	\$105.35	\$150.19	-29.9%	\$20.30	\$85.67	-76.3%
Downtown Ottawa	15.9%	57.8%	-41.8	\$109.76	\$163.40	-32.8%	\$17.48	\$94.36	-81.5%
Ottawa West	24.7%	58.8%	-34.1	\$102.03	\$135.19	-24.5%	\$25.17	\$79.48	-68.3%
Ottawa East	18.9%	49.9%	-31.0	\$101.25	\$125.08	-19.1%	\$19.12	\$62.35	-69.3%
Southern Ontario	22.2%	45.9%	-23.6	\$91.31	\$118.86	-23.2%	\$20.32	\$54.50	-62.7%
London	31.5%	61.3%	-29.8	\$80.54	\$121.74	-33.8%	\$25.37	\$74.62	-66.0%
Windsor	36.7%	45.4%	-8.8	\$97.08	\$112.83	-14.0%	\$35.59	\$51.25	-30.6%
Kitchener/Waterloo/Cambridge/Guelph	28.9%	55.7%	-26.8	\$86.86	\$123.31	-29.6%	\$25.07	\$68.63	-63.5%
Hamilton/Brantford	34.8%	51.3%	-16.5	\$103.13	\$126.70	-18.6%	\$35.93	\$64.99	-44.7%
Niagara Falls	7.8%	37.4%	-29.5	\$94.17	\$114.92	-18.1%	\$7.38	\$42.96	-82.8%
Other Niagara Region	24.2%	37.8%	-13.6	\$81.52	\$115.99	-29.7%	\$19.71	\$43.81	-55.0%
Other Southern Ontario	30.3%	44.8%	-14.6	\$96.50	\$116.74	-17.3%	\$29.21	\$52.33	-44.2%
Central Ontario	21.4%	46.0%	-24.5	\$93.73	\$140.18	-33.1%	\$20.10	\$64.46	-68.8%
North Eastern Ontario	25.2%	47.1%	-21.9	\$104.76	\$121.54	-13.8%	\$26.43	\$57.23	-53.8%
North Bay	22.0%	42.2%	-20.2	\$93.05	\$118.39	-21.4%	\$20.43	\$49.90	-59.1%
Sudbury	27.0%	51.1%	-24.2	\$105.92	\$119.31	-11.2%	\$28.56	\$60.99	-53.2%
North Central Ontario	18.5%	37.4%	-18.9	\$88.98	\$106.38	-16.4%	\$16.48	\$39.80	-58.6%
Sault Ste. Marie									
North Western Ontario	35.3%	53.8%	-18.5	\$119.47	\$122.72	-2.7%	\$42.17	\$66.07	-36.2%
Thunder Bay	34.6%	55.5%	-21.0	\$119.42	\$120.76	-1.1%	\$41.27	\$67.05	-38.5%

* Based on the operating results of 241,354 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 2021*

Location	Occupancy Percentage			Average Daily Rate			Revenue Per Available Room		
	2021	2020	**Point Change	2021	2020	Variance	2021	2020	Variance
WESTERN CANADA	24.4%	49.1%	-24.7	\$111.91	\$148.03	-24.4%	\$27.31	\$72.74	-62.5%
MANITOBA	23.9%	55.4%	-31.5	\$107.33	\$120.95	-11.3%	\$25.69	\$67.02	-61.7%
Winnipeg	22.0%	56.7%	-34.8	\$108.32	\$119.55	-9.4%	\$23.80	\$67.84	-64.9%
Brandon	21.8%	46.1%	-24.3	\$89.55	\$128.34	-30.2%	\$19.53	\$59.16	-67.0%
Other Manitoba	32.5%	55.9%	-23.3	\$112.82	\$122.72	-8.1%	\$36.69	\$68.54	-46.5%
SASKATCHEWAN	24.3%	47.5%	-23.2	\$100.89	\$116.60	-13.5%	\$24.50	\$55.38	-55.8%
Regina	22.4%	52.8%	-30.4	\$91.52	\$114.39	-20.0%	\$20.47	\$60.41	-66.1%
Saskatoon	22.7%	52.9%	-30.2	\$104.27	\$122.46	-14.9%	\$23.69	\$64.82	-63.5%
Other Saskatchewan	27.2%	38.8%	-11.6	\$103.93	\$111.18	-6.5%	\$28.28	\$43.17	-34.5%
ALBERTA (excl. Alta Resorts)	19.9%	41.5%	-21.6	\$97.28	\$121.75	-20.1%	\$19.36	\$50.57	-61.7%
Calgary	14.3%	44.5%	-30.1	\$93.03	\$131.38	-29.2%	\$13.35	\$58.45	-77.2%
Calgary Airport	17.4%	48.3%	-30.9	\$87.51	\$109.50	-20.1%	\$15.19	\$52.90	-71.3%
Downtown Calgary	6.8%	43.6%	-36.8	\$123.54	\$171.56	-28.0%	\$8.39	\$74.74	-88.8%
Calgary Northwest	26.1%	40.3%	-14.2	\$77.35	\$103.41	-25.2%	\$20.16	\$41.63	-51.6%
Calgary South	16.6%	39.8%	-23.2	\$94.56	\$119.97	-21.2%	\$15.70	\$47.72	-67.1%
Edmonton	19.3%	43.5%	-24.1	\$89.62	\$121.88	-26.5%	\$17.33	\$52.99	-67.3%
Downtown Edmonton	12.4%	44.2%	-31.8	\$128.43	\$152.57	-15.8%	\$15.93	\$67.39	-76.4%
Edmonton South	22.1%	42.2%	-20.1	\$83.36	\$105.93	-21.3%	\$18.45	\$44.69	-58.7%
Edmonton West	19.6%	43.6%	-24.0	\$83.24	\$110.75	-24.8%	\$16.29	\$48.28	-66.3%
Other Alberta	24.1%	38.2%	-14.1	\$103.13	\$114.16	-9.7%	\$24.89	\$43.64	-43.0%
Lethbridge	16.6%	34.8%	-18.1	\$87.56	\$105.66	-17.1%	\$14.54	\$36.72	-60.4%
Red Deer	16.7%	31.4%	-14.7	\$87.80	\$105.31	-16.6%	\$14.67	\$33.06	-55.6%
Other Alberta Communities	26.6%	39.9%	-13.3	\$106.34	\$116.36	-8.6%	\$28.34	\$46.44	-39.0%
Alberta Resorts	20.5%	50.1%	-29.6	\$189.46	\$238.80	-20.7%	\$38.77	\$119.56	-67.6%
BRITISH COLUMBIA	29.6%	56.5%	-26.9	\$120.58	\$173.20	-30.4%	\$35.67	\$97.84	-63.5%
Greater Vancouver	26.8%	65.6%	-38.8	\$116.63	\$170.83	-31.7%	\$31.27	\$112.11	-72.1%
Airport (Richmond)	36.6%	72.8%	-36.3	\$115.07	\$156.99	-26.7%	\$42.07	\$114.35	-63.2%
Downtown Vancouver	16.8%	63.7%	-46.9	\$137.17	\$198.07	-30.7%	\$23.03	\$126.13	-81.7%
Langley/Surrey	41.9%	59.3%	-17.4	\$98.49	\$120.88	-18.5%	\$41.26	\$71.70	-42.5%
Other Vancouver	36.7%	66.2%	-29.5	\$102.40	\$134.19	-23.7%	\$37.60	\$88.88	-57.7%
Vancouver Island	34.2%	48.4%	-14.2	\$108.63	\$123.81	-12.3%	\$37.17	\$59.98	-38.0%
Campbell River	45.2%	50.5%	-5.4	\$91.26	\$103.92	-12.2%	\$41.21	\$52.51	-21.5%
Greater Victoria	31.0%	46.3%	-15.3	\$102.94	\$131.13	-21.5%	\$31.90	\$60.75	-47.5%
Nanaimo	30.4%	53.4%	-23.0	\$115.61	\$128.16	-9.8%	\$35.12	\$68.46	-48.7%
Parksville/Qualicum Beach	35.5%	47.9%	-12.5	\$112.35	\$119.95	-6.3%	\$39.87	\$57.51	-30.7%
Other Vancouver Island	43.2%	53.0%	-9.8	\$122.75	\$104.38	17.6%	\$53.07	\$55.34	-4.1%
Whistler Resort Area	26.5%	79.8%	-53.3	\$294.74	\$466.29	-36.8%	\$78.23	\$372.12	-79.0%
Other British Columbia	31.7%	45.3%	-13.5	\$106.58	\$119.50	-10.8%	\$33.81	\$54.09	-37.5%
Abbotsford/Chilliwack	37.3%	61.5%	-24.3	\$84.32	\$99.04	-14.9%	\$31.43	\$60.94	-48.4%
Kamloops	28.0%	39.5%	-11.5	\$91.36	\$96.99	-5.8%	\$25.53	\$38.31	-33.3%
Kelowna	25.8%	43.7%	-17.9	\$99.58	\$121.69	-18.2%	\$25.73	\$53.23	-51.7%
Penticton	14.7%	24.0%	-9.3	\$96.17	\$103.14	-6.8%	\$14.16	\$24.80	-42.9%
Prince George	34.7%	50.1%	-15.4	\$106.57	\$114.51	-6.9%	\$36.99	\$57.39	-35.5%
Other B.C. Communities	34.6%	45.9%	-11.3	\$114.58	\$128.18	-10.6%	\$39.69	\$58.87	-32.6%
NORTHWEST TERRITORIES	28.6%	64.6%	-36.0	\$149.71	\$148.45	0.8%	\$42.76	\$95.92	-55.4%
YUKON	21.2%	44.2%	-23.1	\$101.60	\$129.26	-21.4%	\$21.50	\$57.18	-62.4%
CANADA	22.5%	50.4%	-27.9	\$105.54	\$146.78	-28.1%	\$23.73	\$73.97	-67.9%

* Based on the operating results of 241,354 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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REGIONAL REPORT OF ROOMS OPERATIONS BY PROPERTY SIZE, PROPERTY TYPE AND PRICE LEVEL MONTH OF JANUARY 2021*

ATLANTIC

	Occupancy Percentage			Average Daily Rate		
	2021	2020	**Point Change	2021	2020	Variance
Property Size						
Under 50 rooms	19.0%	28.5%	-9.6	\$96.64	\$111.49	-13.3%
50-75 rooms	22.4%	33.8%	-11.4	\$84.61	\$102.10	-17.1%
76-125 rooms	18.7%	41.1%	-22.4	\$94.64	\$116.09	-18.5%
126-200 rooms	18.8%	43.5%	-24.6	\$95.18	\$128.40	-25.9%
201-500 rooms	13.0%	37.4%	-24.4	\$86.64	\$132.17	-34.5%
Over 500 rooms	N/A	N/A	N/A	N/A	N/A	N/A
Total	18.1%	39.6%	-21.5	\$91.69	\$120.79	-24.1%
Property Type						
Limited Service	20.9%	40.8%	-19.8	\$93.42	\$116.44	-19.8%
Full Service	14.7%	38.7%	-24.1	\$88.43	\$123.74	-28.5%
Suite Hotel	29.1%	52.5%	-23.4	\$95.09	\$131.40	-27.6%
Resort	N/A	N/A	N/A	N/A	N/A	N/A
Total	18.1%	39.6%	-21.5	\$91.69	\$120.79	-24.1%
Price Level						
Budget	19.1%	30.1%	-11.0	\$83.92	\$97.93	-14.3%
Mid-Price	18.4%	42.2%	-23.8	\$93.14	\$124.02	-24.9%
Upscale	7.5%	36.2%	-28.7	\$112.34	\$139.95	-19.7%
Total	18.1%	39.6%	-21.5	\$91.69	\$120.79	-24.1%

CENTRAL

	Occupancy Percentage			Average Daily Rate		
	2021	2020	**Point Change	2021	2020	Variance
Property Size						
Under 50 rooms	26.9%	39.7%	-12.8	\$91.96	\$121.20	-24.1%
50-75 rooms	27.9%	47.0%	-19.1	\$94.98	\$112.28	-15.4%
76-125 rooms	27.4%	52.4%	-25.0	\$95.94	\$125.12	-23.3%
126-200 rooms	25.4%	54.5%	-29.1	\$95.36	\$137.48	-30.6%
201-500 rooms	13.6%	56.6%	-42.9	\$113.63	\$170.83	-33.5%
Over 500 rooms	9.5%	53.2%	-43.7	\$122.29	\$190.66	-35.9%
Total	21.2%	53.3%	-32.1	\$99.92	\$148.58	-32.7%
Property Type						
Limited Service	29.0%	50.2%	-21.2	\$90.32	\$114.50	-21.1%
Full Service	15.3%	53.8%	-38.5	\$104.46	\$161.46	-35.3%
Suite Hotel	33.2%	61.8%	-28.6	\$105.38	\$148.03	-28.8%
Resort	10.2%	50.8%	-40.6	\$189.42	\$217.90	-13.1%
Total	21.2%	53.3%	-32.1	\$99.92	\$148.58	-32.7%
Price Level						
Budget	26.6%	47.5%	-20.8	\$81.93	\$101.18	-19.0%
Mid-Price	22.3%	54.4%	-31.5	\$100.87	\$144.06	-30.0%
Upscale	7.4%	56.8%	-49.4	\$172.16	\$219.64	-21.6%
Total	21.2%	53.3%	-32.1	\$99.92	\$148.58	-32.7%

WESTERN

	Occupancy Percentage			Average Daily Rate		
	2021	2020	**Point Change	2021	2020	Variance
Property Size						
Under 50 rooms	31.4%	41.6%	-10.2	\$98.13	\$105.83	-7.3%
50-75 rooms	31.7%	44.8%	-13.1	\$94.40	\$108.14	-12.7%
76-125 rooms	28.1%	47.2%	-19.2	\$102.85	\$122.41	-16.0%
126-200 rooms	23.5%	48.9%	-25.4	\$108.36	\$132.47	-18.2%
201-500 rooms	18.0%	53.1%	-35.1	\$141.03	\$187.34	-24.7%
Over 500 rooms	9.0%	62.6%	-53.6	\$274.91	\$278.75	-1.4%
Total	24.4%	49.1%	-24.7	\$111.91	\$148.03	-24.4%
Property Type						
Limited Service	28.9%	44.6%	-15.6	\$95.29	\$109.54	-13.0%
Full Service	19.8%	51.3%	-31.5	\$114.47	\$150.34	-23.9%
Suite Hotel	27.8%	54.1%	-26.3	\$115.18	\$157.36	-26.8%
Resort	24.7%	57.6%	-32.8	\$204.30	\$295.10	-30.8%
Total	24.4%	49.1%	-24.7	\$111.91	\$148.03	-24.4%
Price Level						
Budget	31.9%	44.7%	-12.8	\$84.39	\$98.00	-13.9%
Mid-Price	24.2%	48.5%	-24.3	\$108.41	\$129.96	-16.6%
Upscale	15.5%	57.6%	-42.0	\$214.52	\$267.70	-19.9%
Total	24.4%	49.1%	-24.7	\$111.91	\$148.03	-24.4%

CANADA *

	Occupancy Percentage			Average Daily Rate		
	2021	2020	**Point Change	2021	2020	Variance
Property Size						
Under 50 rooms	29.5%	40.5%	-11.0	\$96.26	\$111.31	-13.5%
50-75 rooms	29.3%	44.5%	-15.2	\$93.86	\$109.28	-14.1%
76-125 rooms	27.0%	48.8%	-21.8	\$99.46	\$123.13	-19.2%
126-200 rooms	24.0%	51.1%	-27.1	\$101.22	\$134.65	-24.8%
201-500 rooms	15.6%	54.0%	-38.4	\$126.53	\$176.55	-28.3%
Over 500 rooms	9.3%	55.6%	-46.3	\$162.80	\$216.22	-24.7%
Total	22.5%	50.4%	-27.9	\$105.54	\$146.78	-28.1%
Property Type						
Limited Service	28.2%	46.4%	-18.2	\$93.21	\$112.15	-16.9%
Full Service	17.2%	51.7%	-34.6	\$108.39	\$154.95	-30.0%
Suite Hotel	31.1%	58.7%	-27.5	\$107.94	\$150.40	-28.2%
Resort	19.9%	54.0%	-34.1	\$201.81	\$271.28	-25.6%
Total	22.5%	50.4%	-27.9	\$105.54	\$146.78	-28.1%
Price Level						
Budget	28.4%	45.1%	-16.7	\$83.22	\$99.69	-16.5%
Mid-Price	23.1%	50.6%	-27.4	\$104.16	\$136.24	-23.5%
Upscale	11.1%	56.8%	-45.6	\$198.17	\$241.59	-18.0%
Total	22.5%	50.4%	-27.9	\$105.54	\$146.78	-28.1%

* Based on the operating results of 241,354 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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