



TRENDS IN THE CANADIAN
HOTEL INDUSTRY

National Market Report

JANUARY 2026

Report of rooms operations by location

MONTH OF JANUARY 2026*

Location	Occupancy Percentage			Average Daily Rate			Revenue Per Available Room		
	2026	2025	**Point Change	2026	2025	Variance	2026	2025	Variance
ATLANTIC CANADA	42.2%	40.0%	2.3	\$153.88	\$148.71	3.5%	\$65.01	\$59.46	9.3%
Newfoundland	37.9%	36.1%	1.8	\$138.20	\$136.44	1.3%	\$52.35	\$49.25	6.3%
St. John's	37.0%	35.8%	1.2	\$133.95	\$134.19	-0.2%	\$49.54	\$48.04	3.1%
Prince Edward Island	29.8%	29.5%	0.2	\$162.61	\$161.13	0.9%	\$48.41	\$47.58	1.7%
Nova Scotia	45.6%	43.3%	2.3	\$161.81	\$155.72	3.9%	\$73.77	\$67.40	9.4%
Halifax/Dartmouth	47.4%	44.1%	3.3	\$166.05	\$162.30	2.3%	\$78.64	\$71.55	9.9%
Other Nova Scotia	42.3%	41.7%	0.7	\$153.09	\$141.77	8.0%	\$64.82	\$59.08	9.7%
New Brunswick	42.5%	39.8%	2.7	\$145.70	\$139.90	4.1%	\$61.98	\$55.73	11.2%
Moncton	44.0%	41.2%	2.8	\$154.96	\$142.78	8.5%	\$68.17	\$58.77	16.0%
Other New Brunswick	41.8%	39.2%	2.6	\$140.70	\$138.34	1.7%	\$58.80	\$54.16	8.6%
CENTRAL CANADA	51.6%	50.9%	0.7	\$189.11	\$183.86	2.9%	\$97.65	\$93.60	4.3%
Quebec	50.4%	48.5%	1.9	\$205.20	\$203.51	0.8%	\$103.48	\$98.78	4.8%
Greater Quebec City	53.5%	51.2%	2.3	\$205.15	\$200.57	2.3%	\$109.79	\$102.63	7.0%
Other Quebec	50.6%	49.5%	1.1	\$224.33	\$220.78	1.6%	\$113.61	\$109.34	3.9%
Greater Montreal	49.7%	47.5%	2.2	\$195.27	\$194.89	0.2%	\$97.01	\$92.58	4.8%
Downtown Montreal	45.7%	42.4%	3.3	\$202.97	\$202.48	0.2%	\$92.81	\$85.87	8.1%
Montreal Airport/Laval	58.1%	57.5%	0.6	\$189.78	\$194.69	-2.5%	\$110.30	\$112.03	-1.5%
Ontario	52.1%	51.7%	0.4	\$183.27	\$177.49	3.3%	\$95.44	\$91.73	4.0%
Greater Toronto Area (GTA)	59.4%	58.4%	1.0	\$202.50	\$197.36	2.6%	\$120.24	\$115.21	4.4%
Downtown Toronto	56.2%	53.2%	3.1	\$273.63	\$265.69	3.0%	\$153.90	\$141.27	8.9%
Toronto Airport	70.0%	69.8%	0.2	\$185.98	\$184.34	0.9%	\$130.19	\$128.60	1.2%
GTA West	59.8%	58.6%	1.2	\$148.47	\$152.49	-2.6%	\$88.80	\$89.38	-0.6%
GTA East/North	55.1%	58.2%	-3.1	\$166.13	\$154.78	7.3%	\$91.59	\$90.14	1.6%
Eastern Ontario	45.2%	40.7%	4.5	\$152.90	\$150.74	1.4%	\$69.07	\$61.32	12.6%
Kingston	49.2%	44.4%	4.9	\$157.61	\$156.56	0.7%	\$77.59	\$69.48	11.7%
Other Eastern Ontario	43.2%	39.0%	4.2	\$150.22	\$147.70	1.7%	\$64.83	\$57.57	12.6%
Ottawa	57.8%	54.8%	3.0	\$185.96	\$183.47	1.4%	\$107.54	\$100.60	6.9%
Downtown Ottawa	53.8%	52.8%	0.9	\$198.69	\$193.73	2.6%	\$106.82	\$102.32	4.4%
Ottawa West	65.0%	61.9%	3.1	\$175.95	\$174.76	0.7%	\$114.45	\$108.25	5.7%
Ottawa East	57.5%	44.9%	12.6	\$163.25	\$163.98	-0.4%	\$93.95	\$73.63	27.6%
Southern Ontario	43.0%	45.2%	-2.2	\$157.51	\$146.50	7.5%	\$67.65	\$66.16	2.3%
London	57.6%	57.4%	0.2	\$158.31	\$147.98	7.0%	\$91.11	\$84.86	7.4%
Windsor	39.3%	57.7%	-18.4	\$140.39	\$139.57	0.6%	\$55.17	\$80.50	-31.5%
Kitchener/Waterloo/Cambridge/Guelph	51.8%	55.3%	-3.5	\$162.36	\$165.68	-2.0%	\$84.12	\$91.64	-8.2%
Hamilton/Brantford	44.3%	44.2%	0.1	\$150.87	\$145.78	3.5%	\$66.88	\$64.47	3.7%
Niagara Falls	35.6%	36.9%	-1.3	\$155.04	\$127.35	21.7%	\$55.16	\$46.99	17.4%
Other Niagara Region	42.6%	42.9%	-0.3	\$178.22	\$169.98	4.8%	\$76.00	\$72.99	4.1%
Other Southern Ontario	42.8%	40.8%	2.0	\$159.05	\$158.96	0.1%	\$68.04	\$64.90	4.8%
Central Ontario	44.1%	44.1%	0.0	\$181.19	\$174.26	4.0%	\$79.94	\$76.88	4.0%
North Eastern Ontario	49.3%	48.5%	0.8	\$155.41	\$150.21	3.5%	\$76.63	\$72.83	5.2%
North Bay	47.9%	49.1%	-1.2	\$134.31	\$128.20	4.8%	\$64.38	\$62.95	2.3%
Sudbury	49.2%	48.6%	0.6	\$146.13	\$150.14	-2.7%	\$71.91	\$72.95	-1.4%
North Central Ontario									
Sault Ste. Marie	45.6%	45.5%	0.2	\$146.74	\$135.64	8.2%	\$66.96	\$61.65	8.6%
North Western Ontario	56.8%	55.1%	1.7	\$185.33	\$180.31	2.8%	\$105.29	\$99.32	6.0%
Thunder Bay	56.2%	56.3%	-0.1	\$190.45	\$181.90	4.7%	\$106.97	\$102.41	4.5%

* Based on the operating results of 259,014 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 2026*

Location	Occupancy Percentage			Average Daily Rate			Revenue Per Available Room		
	2026	2025	**Point Change	2026	2025	Variance	2026	2025	Variance
WESTERN CANADA	52.5%	49.4%	3.1	\$190.75	\$180.92	5.4%	\$100.16	\$89.41	12.0%
Manitoba	59.3%	52.4%	6.9	\$173.48	\$160.81	7.9%	\$102.84	\$84.28	22.0%
Winnipeg	61.3%	53.2%	8.1	\$176.34	\$164.13	7.4%	\$108.18	\$87.37	23.8%
Brandon	48.3%	50.7%	-2.4	\$166.70	\$162.07	2.9%	\$80.52	\$82.23	-2.1%
Other Manitoba	59.2%	50.6%	8.6	\$166.52	\$147.86	12.6%	\$98.54	\$74.75	31.8%
Saskatchewan	50.0%	48.9%	1.1	\$147.67	\$140.38	5.2%	\$73.82	\$68.68	7.5%
Regina	49.4%	44.4%	5.1	\$137.55	\$130.94	5.0%	\$68.02	\$58.12	17.0%
Saskatoon	54.8%	54.6%	0.2	\$158.40	\$151.02	4.9%	\$86.87	\$82.45	5.4%
Other Saskatchewan	46.6%	47.9%	-1.3	\$144.68	\$136.42	6.0%	\$67.47	\$65.34	3.3%
Alberta (excl. Alta Resorts)	48.2%	46.0%	2.2	\$146.77	\$140.60	4.4%	\$70.76	\$64.64	9.5%
Calgary	47.9%	45.4%	2.5	\$154.72	\$150.21	3.0%	\$74.09	\$68.24	8.6%
Calgary Airport	54.1%	49.2%	4.9	\$135.72	\$136.29	-0.4%	\$73.38	\$67.04	9.5%
Downtown Calgary	41.4%	38.3%	3.1	\$196.57	\$188.43	4.3%	\$81.38	\$72.17	12.8%
Calgary Northwest	47.6%	50.3%	-2.7	\$115.39	\$120.61	-4.3%	\$54.94	\$60.72	-9.5%
Calgary South	48.4%	49.1%	-0.7	\$142.57	\$135.63	5.1%	\$69.02	\$66.66	3.5%
Edmonton	52.4%	50.0%	2.3	\$150.72	\$140.85	7.0%	\$78.91	\$70.46	12.0%
Downtown Edmonton	52.1%	44.3%	7.8	\$214.47	\$191.63	11.9%	\$111.78	\$84.88	31.7%
Edmonton South	52.4%	52.4%	0.0	\$131.67	\$124.06	6.1%	\$69.02	\$65.06	6.1%
Edmonton West	52.4%	50.2%	2.2	\$141.69	\$136.86	3.5%	\$74.23	\$68.72	8.0%
Other Alberta	45.7%	43.5%	2.1	\$137.38	\$133.06	3.2%	\$62.72	\$57.91	8.3%
Lethbridge	39.3%	46.2%	-6.9	\$130.45	\$125.29	4.1%	\$51.25	\$57.84	-11.4%
Red Deer	44.6%	42.2%	2.4	\$130.72	\$124.91	4.6%	\$58.31	\$52.73	10.6%
Other Alberta Communities	46.7%	43.3%	3.4	\$139.72	\$136.39	2.4%	\$65.18	\$59.05	10.4%
Alberta Resorts	46.5%	44.1%	2.4	\$435.24	\$360.70	20.7%	\$202.37	\$159.12	27.2%
British Columbia	56.9%	53.1%	3.8	\$225.64	\$216.94	4.0%	\$128.29	\$115.17	11.4%
Greater Vancouver	64.5%	60.3%	4.2	\$218.42	\$211.47	3.3%	\$140.82	\$127.53	10.4%
Airport (Richmond)	75.3%	66.5%	8.7	\$184.15	\$185.83	-0.9%	\$138.59	\$123.65	12.1%
Downtown Vancouver	63.5%	59.5%	3.9	\$253.89	\$243.20	4.4%	\$161.15	\$144.79	11.3%
Langley/Surrey	52.5%	55.3%	-2.8	\$173.31	\$163.81	5.8%	\$90.92	\$90.54	0.4%
Other Vancouver	58.0%	55.7%	2.3	\$188.19	\$179.68	4.7%	\$109.10	\$100.01	9.1%
Vancouver Island	50.3%	47.2%	3.2	\$171.21	\$167.26	2.4%	\$86.15	\$78.88	9.2%
Campbell River	53.0%	51.0%	2.1	\$117.91	\$123.52	-4.5%	\$62.53	\$62.95	-0.7%
Greater Victoria	51.2%	49.5%	1.7	\$180.96	\$176.94	2.3%	\$92.66	\$87.59	5.8%
Nanaimo	47.1%	44.2%	2.9	\$147.98	\$141.63	4.5%	\$69.66	\$62.57	11.3%
Parksville/Qualicum Beach	45.4%	34.1%	11.2	\$167.52	\$153.17	9.4%	\$76.04	\$52.31	45.4%
Other Vancouver Island	51.7%	47.7%	4.0	\$173.46	\$171.03	1.4%	\$89.72	\$81.55	10.0%
Whistler Resort Area	80.4%	75.1%	5.3	\$647.34	\$597.12	8.4%	\$520.72	\$448.70	16.1%
Other British Columbia	47.3%	43.8%	3.5	\$155.92	\$152.54	2.2%	\$73.81	\$66.84	10.4%
Abbotsford/Chilliwack	58.5%	53.0%	5.4	\$155.82	\$156.08	-0.2%	\$91.08	\$82.79	10.0%
Kamloops	43.5%	42.9%	0.6	\$129.68	\$128.20	1.2%	\$56.41	\$55.04	2.5%
Kelowna	45.9%	43.2%	2.7	\$149.48	\$143.60	4.1%	\$68.60	\$61.96	10.7%
Penticton	23.0%	21.5%	1.6	\$121.99	\$117.46	3.9%	\$28.11	\$25.23	11.4%
Prince George	52.0%	47.7%	4.2	\$155.75	\$149.57	4.1%	\$80.95	\$71.42	13.3%
Other B.C. Communities	48.9%	44.8%	4.1	\$164.27	\$161.65	1.6%	\$80.27	\$72.39	10.9%
Yukon	35.9%	40.7%	-4.7	\$180.48	\$158.19	14.1%	\$64.81	\$64.30	0.8%
CANADA	51.4%	49.4%	1.9	\$187.78	\$180.46	4.1%	\$96.43	\$89.21	8.1%

* Based on the operating results of 259,014 rooms (unweighted data)

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Regional report of rooms operations by property size, type and price level
MONTH OF JANUARY 2026*

ATLANTIC							CENTRAL						
	Occupancy Percentage			Average Daily Rates				Occupancy Percentage			Average Daily Rates		
	2026	2025	**Point Change	2026	2025	Variance		2026	2025	**Point Change	2026	2025	Variance
Property Size													
Under 50 rooms	28.9%	30.1%	-1.2	\$135.35	\$132.71	2.0%		38.8%	39.1%	-0.3	\$162.51	\$155.93	4.2%
50-75 rooms	40.2%	39.3%	0.9	\$136.11	\$129.58	5.0%		47.9%	45.7%	2.2	\$148.37	\$143.84	3.1%
76-125 rooms	44.8%	42.7%	2.1	\$152.79	\$147.23	3.8%		52.4%	51.6%	0.8	\$162.86	\$161.05	1.1%
126-200 rooms	45.7%	39.3%	6.4	\$159.48	\$156.14	2.1%		52.0%	54.8%	-2.8	\$176.49	\$168.02	5.0%
201-500 rooms	35.7%	37.2%	-1.5	\$163.49	\$155.80	4.9%		52.4%	50.5%	1.9	\$219.60	\$213.58	2.8%
Over 500 rooms	N/A	N/A	N/A	N/A	N/A	N/A		53.7%	49.7%	4.0	\$244.26	\$238.11	2.6%
Total	42.2%	40.0%	2.3	\$153.88	\$148.71	3.5%		51.6%	50.9%	0.7	\$189.11	\$183.86	2.9%
Property Type													
Limited Service	44.8%	43.3%	1.5	\$151.04	\$145.46	3.8%		49.2%	48.8%	0.5	\$149.06	\$145.40	2.5%
Full Service	40.7%	37.5%	3.2	\$155.25	\$150.98	2.8%		52.3%	51.3%	1.1	\$206.91	\$198.44	4.3%
Suite Hotel	56.2%	52.3%	3.9	\$166.62	\$160.31	3.9%		56.8%	58.4%	-1.6	\$182.45	\$183.61	-0.6%
Resort	N/A	N/A	N/A	N/A	N/A	N/A		50.2%	47.4%	2.8	\$288.27	\$286.83	0.5%
Total	42.2%	40.0%	2.3	\$153.88	\$148.71	3.5%		51.6%	50.9%	0.7	\$189.11	\$183.86	2.9%
Price Level													
Budget	36.1%	32.7%	3.5	\$137.06	\$126.36	8.5%		42.9%	45.4%	-2.5	\$134.19	\$119.08	12.7%
Mid-Price	45.3%	41.0%	2.3	\$153.34	\$149.16	2.8%		53.1%	52.1%	0.9	\$176.56	\$173.14	2.0%
Upscale	37.2%	39.5%	-2.3	\$203.13	\$184.38	10.2%		50.8%	49.2%	1.6	\$286.06	\$276.30	3.5%
Total	42.2%	40.0%	2.3	\$153.88	\$148.71	3.5%		51.6%	50.9%	0.7	\$189.11	\$183.86	2.9%
WESTERN							CANADA						
	Occupancy Percentage			Average Daily Rates				Occupancy Percentage			Average Daily Rates		
	2026	2025	**Point Change	2026	2025	Variance		2026	2025	**Point Change	2026	2025	Variance
Property Size													
Under 50 rooms	43.2%	40.3%	2.9	\$129.05	\$121.74	6.0%		40.9%	39.6%	1.4	\$141.53	\$134.60	5.1%
50-75 rooms	48.3%	45.6%	2.8	\$137.50	\$131.93	4.2%		47.4%	45.1%	2.3	\$141.94	\$136.70	3.8%
76-125 rooms	52.2%	49.8%	2.4	\$157.34	\$150.90	4.3%		51.6%	49.9%	1.7	\$159.42	\$155.03	2.8%
126-200 rooms	53.1%	50.8%	2.3	\$176.44	\$167.75	5.2%		51.9%	51.7%	0.3	\$175.21	\$167.10	4.9%
201-500 rooms	54.5%	50.1%	4.4	\$233.75	\$225.15	3.8%		52.3%	49.5%	2.8	\$224.05	\$216.31	3.6%
Over 500 rooms	61.6%	55.5%	6.1	\$410.64	\$373.57	9.9%		55.7%	51.2%	4.5	\$290.34	\$274.87	5.6%
Total	52.5%	49.4%	3.1	\$190.75	\$180.91	5.4%		51.4%	49.4%	1.9	\$187.78	\$180.46	4.1%
Property Type													
Limited Service	49.9%	47.4%	2.5	\$140.77	\$134.54	4.6%		49.2%	47.6%	1.6	\$145.01	\$139.90	3.6%
Full Service	53.6%	50.1%	3.5	\$190.07	\$182.91	3.9%		52.0%	49.8%	2.3	\$196.76	\$189.36	3.9%
Suite Hotel	60.0%	58.5%	1.5	\$199.83	\$186.34	7.2%		57.8%	58.2%	-0.5	\$187.53	\$183.83	2.0%
Resort	55.1%	50.5%	4.6	\$477.98	\$427.81	11.7%		51.5%	48.0%	3.5	\$405.77	\$373.49	8.6%
Total	52.5%	49.4%	3.1	\$190.75	\$180.91	5.4%		51.4%	49.4%	1.9	\$187.78	\$180.46	4.1%
Price Level													
Budget	44.5%	42.2%	2.3	\$123.31	\$116.42	5.9%		43.3%	42.9%	0.3	\$128.61	\$118.11	8.9%
Mid-Price	52.9%	50.1%	2.8	\$163.63	\$158.80	3.0%		52.2%	50.3%	1.9	\$169.22	\$165.11	2.5%
Upscale	58.5%	53.2%	5.3	\$372.08	\$343.10	8.4%		53.9%	50.7%	3.2	\$326.52	\$305.36	6.9%
Total	52.5%	49.4%	3.1	\$190.75	\$180.91	5.4%		51.4%	49.4%	1.9	\$187.78	\$180.46	4.1%

* Based on the operating results of 259,014 rooms (unweighted data)

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