

# CANADA'S LODGING SECTOR

2009



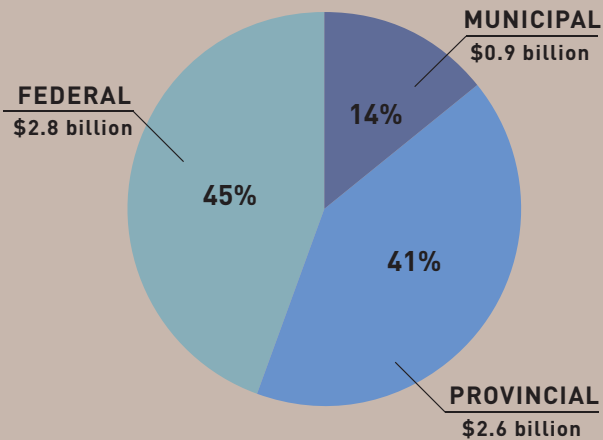
HOTEL ASSOCIATION OF CANADA  
ASSOCIATION DES HÔTELS DU CANADA



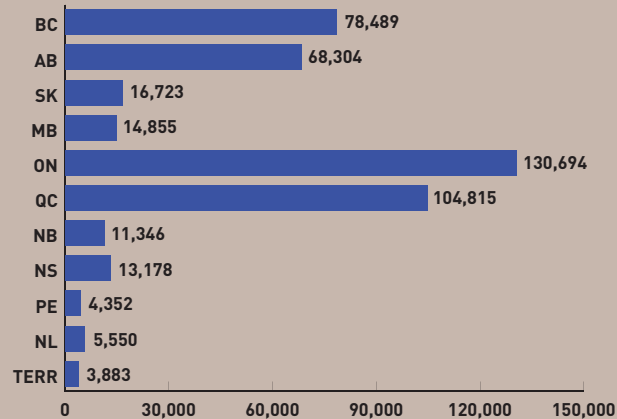
## 2009 Summary

- Generated revenues of **\$17.5 billion**
- Generated "value-added" of **\$15.8 billion**
- Employed about **320,000 people** directly or indirectly on a full-time, part-time or seasonal basis with total salaries and wages estimated at **\$8 billion**
- Generated revenues estimated at **\$6 billion** for all three levels of government

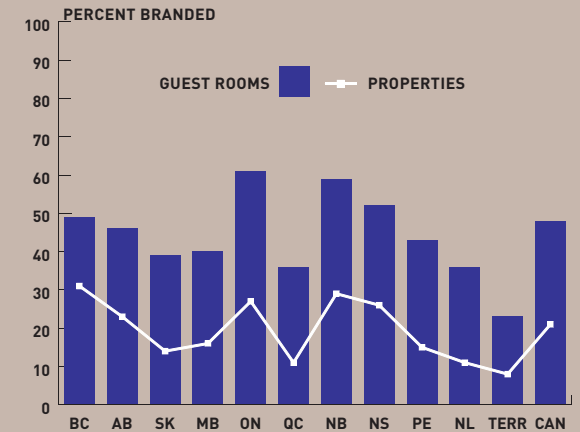
### Government Revenues



### Hotel Rooms by Province



### Hotel Branding



NOTE: PKF's Hotel Inventory utilized for the subject report contains 8,447 establishments offering 452,189 rooms open on an annual basis.

# CANADA'S LODGING SECTOR 2009

NOTE: Based on 2008 Operating Results



	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL	TERR	CANADA
<b>TOTAL ESTABLISHMENTS</b>	1,121	1,123	446	402	2,229	2,274	232	262	131	122	105	8,447
<b>TOTAL ROOMS</b>	78,489	68,304	16,723	14,855	130,694	104,815	11,346	13,178	4,352	5,550	3,883	452,189
<b>REVENUES (000's)</b>												
Rooms	\$2,201,070	\$1,864,136	\$464,682	\$349,162	\$3,087,580	\$2,682,257	\$240,994	\$326,626	\$88,702	\$154,946	\$104,194	\$11,564,348
Food & Beverage	\$926,459	\$721,246	\$135,045	\$107,398	\$1,026,844	\$1,040,898	\$140,130	\$80,064	\$31,830	\$36,126	\$34,330	\$4,280,369
Other <sup>(1)</sup>	\$241,541	\$396,586	\$141,274	\$257,664	\$228,810	\$294,059	\$14,399	\$16,936	\$4,539	\$28,785	\$9,470	\$1,634,064
<b>Total</b>	<b>\$3,369,069</b>	<b>\$2,981,967</b>	<b>\$741,000</b>	<b>\$714,224</b>	<b>\$4,343,234</b>	<b>\$4,017,214</b>	<b>\$395,522</b>	<b>\$423,627</b>	<b>\$125,071</b>	<b>\$219,857</b>	<b>\$147,994</b>	<b>\$17,478,781</b>
<b>VALUE-ADDED<sup>(2)</sup> (000's)</b>												
Direct	\$2,289,478	\$1,991,075	\$483,447	\$435,310	\$2,924,071	\$2,777,681	\$278,404	\$298,627	\$83,250	\$145,681	\$98,993	\$11,806,017
Indirect	\$775,488	\$644,648	\$157,524	\$178,532	\$1,074,931	\$879,830	\$77,908	\$86,874	\$25,279	\$43,228	\$19,616	\$3,963,856
<b>Total</b>	<b>\$3,064,966</b>	<b>\$2,635,722</b>	<b>\$640,971</b>	<b>\$613,842</b>	<b>\$3,999,001</b>	<b>\$3,657,511</b>	<b>\$356,312</b>	<b>\$385,501</b>	<b>\$108,529</b>	<b>\$188,909</b>	<b>\$118,609</b>	<b>\$15,769,873</b>
<b>DIRECT &amp; INDIRECT GOVERNMENT REVENUES (000's)</b>												
Income & Payroll Taxes	\$533,223	\$471,325	\$105,725	\$104,905	\$695,862	\$696,649	\$59,853	\$66,986	\$17,099	\$30,570	\$20,104	\$2,802,301
Property Taxes	\$124,395	\$98,920	\$26,293	\$20,180	\$300,104	\$241,821	\$19,008	\$25,100	\$6,910	\$11,777	\$5,901	\$880,409
Sales & Excise Taxes	\$586,996	\$322,609	\$100,042	\$104,401	\$631,594	\$641,952	\$61,388	\$68,182	\$21,941	\$36,375	\$10,971	\$2,586,451
<b>Total</b>	<b>\$1,244,614</b>	<b>\$892,854</b>	<b>\$232,060</b>	<b>\$229,486</b>	<b>\$1,627,560</b>	<b>\$1,580,422</b>	<b>\$140,249</b>	<b>\$160,268</b>	<b>\$45,950</b>	<b>\$78,722</b>	<b>\$36,976</b>	<b>\$6,269,161</b>
<b>SALARIES &amp; WAGES (000's)</b>												
Direct	\$1,192,651	\$843,897	\$231,192	\$222,838	\$1,408,753	\$1,342,157	\$119,259	\$127,954	\$37,846	\$66,652	\$46,174	\$5,639,371
Indirect	\$485,613	\$351,466	\$78,458	\$100,001	\$669,626	\$530,383	\$47,091	\$55,645	\$17,706	\$26,038	\$10,814	\$2,372,839
<b>Total</b>	<b>\$1,678,264</b>	<b>\$1,195,362</b>	<b>\$309,650</b>	<b>\$322,839</b>	<b>\$2,078,378</b>	<b>\$1,872,540</b>	<b>\$166,350</b>	<b>\$183,599</b>	<b>\$55,552</b>	<b>\$92,690</b>	<b>\$56,988</b>	<b>\$8,012,211</b>
<b>EMPLOYMENT</b>												
Direct <sup>(3)</sup>	49,983	39,241	13,819	10,675	63,224	61,791	6,734	7,125	2,039	3,036	1,627	259,293
Indirect	11,865	8,897	2,253	2,674	15,998	14,845	1,169	1,397	455	663	325	60,541
<b>Total</b>	<b>61,848</b>	<b>48,139</b>	<b>16,071</b>	<b>13,349</b>	<b>79,221</b>	<b>76,637</b>	<b>7,903</b>	<b>8,521</b>	<b>2,493</b>	<b>3,699</b>	<b>1,952</b>	<b>319,833</b>

**METHODOLOGY:** This study was completed by PKF Consulting Inc. on behalf of the Hotel Association of Canada. The 2008 results are based on Operating Revenue from PKF's Trends in the Hotel Industry and PKF's Hotel Industry Supply database. Value-Added, Direct & Indirect Government Revenues, Salaries & Wages and Employment have been based on the ratio's reflected in HAC's Economic Impact Model completed by the Conference Board of Canada in 2001.

**NOTE:** PKF's Hotel Inventory utilized for the subject report contains 8,447 establishments offering 452,189 rooms open on an annual basis.

(1) Other income revenues from Telecommunications, Other Operated Departments including Off Premise Retail Beer, Wine, Cooler and Spirit Sales and Rentals, and Other Income with Commissions from VLT operations.

(2) Value-added is one of the most commonly used indicators of economic activity. Value-added measures economic value created through the production of goods and services. For example, an industry's value-added is the difference between the sales and the costs of its purchases from suppliers.

(3) Direct Employment is based on the average wages contained in the Statistics Canada Survey of Employment used in the 2008 report multiplied by the 2008 gains in average weekly wages provided by the Conference Board of Canada.

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