

# CANADA'S LODGING INDUSTRY 2004



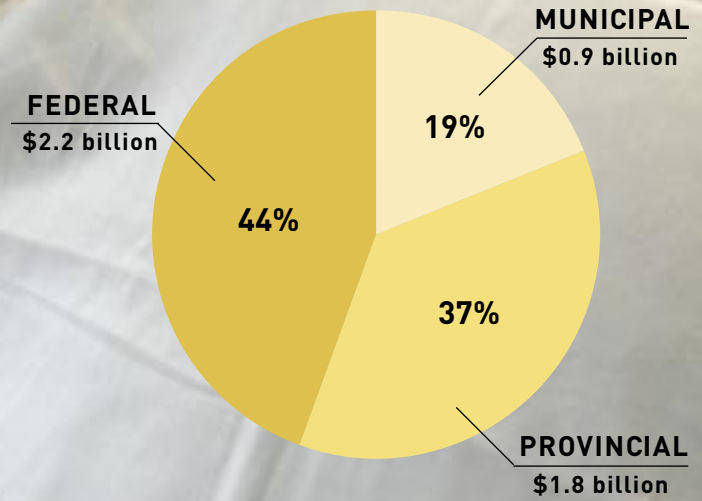
HOTEL ASSOCIATION OF CANADA  
ASSOCIATION DES HOTELS DU CANADA



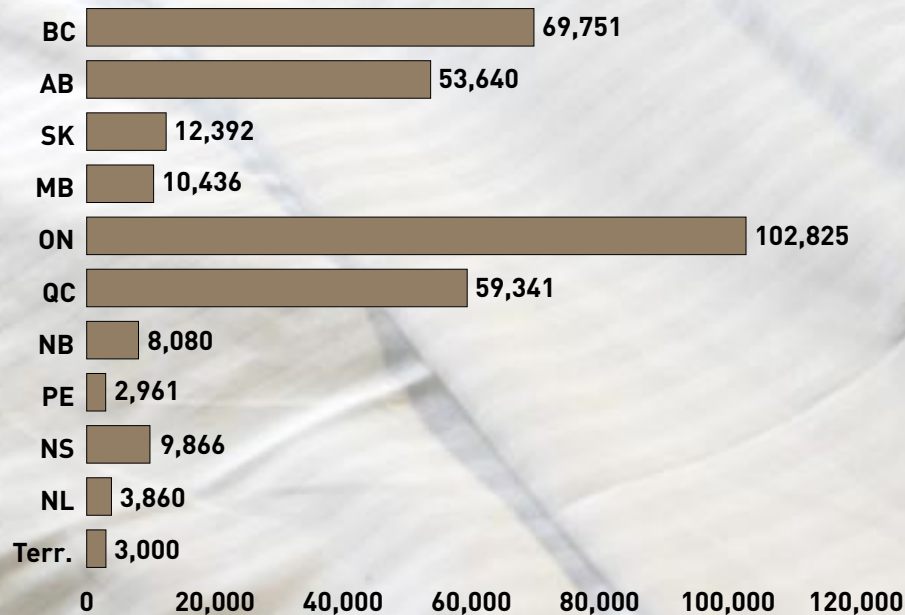
## SUMMARY

THE CANADIAN LODGING INDUSTRY generated revenues of **\$12.6 billion** in 2004. The “value-added” generated by the industry was **\$11.4 billion**. About **270,000** people were employed directly or indirectly in the lodging industry on a full-time, part-time or seasonal basis with total salaries and wages estimated at **\$6.0 billion**. Revenues generated for all three levels of government were estimated at **\$4.9 billion**.

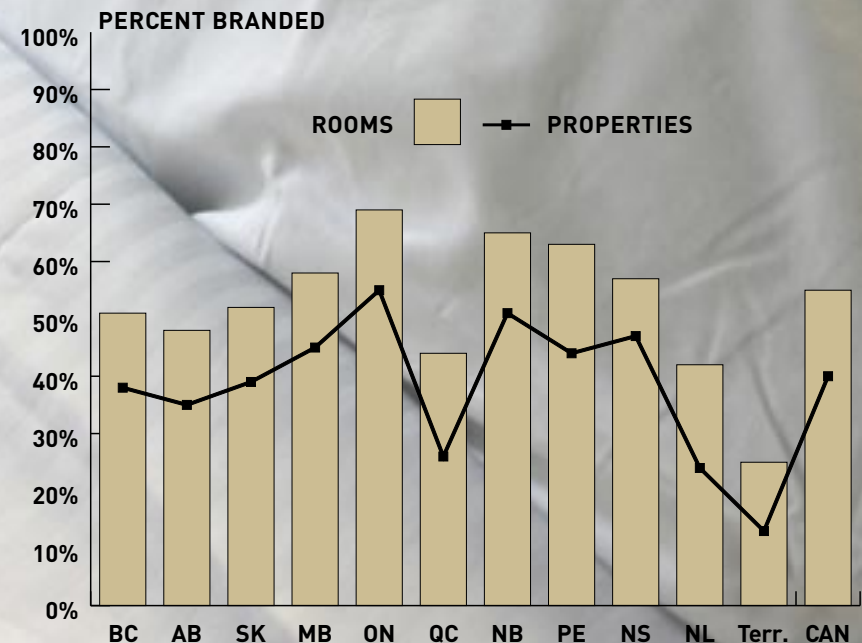
## GOVERNMENT REVENUES



## HOTEL ROOMS BY PROVINCE



## HOTEL BRANDING



# CANADA'S LODGING INDUSTRY 2004



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	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL	TERR.	CANADA
<b>TOTAL ESTABLISHMENTS<sup>(1)</sup></b>	807	595	145	132	920	606	106	116	43	49	48	3,567
<b>TOTAL ROOMS<sup>(1)</sup></b>	69,751	53,640	12,392	10,436	102,825	59,341	8,080	9,866	2,961	3,860	3,000	336,152
<b>REVENUES (000's)</b>												
Rooms	\$1,742,278	\$1,374,672	\$216,309	\$196,535	\$2,578,482	\$1,689,201	\$155,576	\$245,545	\$49,512	\$84,906	\$56,682	\$8,389,699
Food & Beverage	\$797,569	\$721,610	\$81,694	\$77,813	\$957,135	\$546,323	\$36,643	\$61,570	\$14,117	\$20,443	\$19,215	\$3,334,133
Other	\$208,281	\$201,082	\$21,871	\$20,032	\$230,445	\$116,952	\$7,946	\$13,087	\$2,745	\$4,244	\$5,900	\$832,587
<b>Total</b>	<b>\$2,748,129</b>	<b>\$2,297,365</b>	<b>\$319,875</b>	<b>\$294,381</b>	<b>\$3,766,062</b>	<b>\$2,352,476</b>	<b>\$200,165</b>	<b>\$320,203</b>	<b>\$66,374</b>	<b>\$109,593</b>	<b>\$81,798</b>	<b>\$12,556,419</b>
<b>VALUE-ADDED<sup>(2)</sup> (000's)</b>												
Direct	\$1,867,827	\$1,512,929	\$216,182	\$197,897	\$2,505,466	\$1,654,561	\$139,963	\$224,664	\$43,383	\$76,534	\$54,056	\$8,493,463
Indirect	\$639,792	\$509,799	\$65,786	\$65,660	\$931,328	\$506,620	\$39,648	\$66,516	\$13,747	\$20,059	\$11,214	\$2,870,169
<b>Total</b>	<b>\$2,507,618</b>	<b>\$2,022,728</b>	<b>\$281,968</b>	<b>\$263,557</b>	<b>\$3,436,795</b>	<b>\$2,161,181</b>	<b>\$179,611</b>	<b>\$291,181</b>	<b>\$57,130</b>	<b>\$96,593</b>	<b>\$65,270</b>	<b>\$11,363,632</b>
<b>DIRECT &amp; INDIRECT GOVERNMENT REVENUES (000's)</b>												
Income & Payroll Taxes	\$450,701	\$383,304	\$49,657	\$47,544	\$613,697	\$421,530	\$31,744	\$53,354	\$9,621	\$16,296	\$11,989	\$2,089,438
Property Taxes	\$159,038	\$118,679	\$19,017	\$17,763	\$368,618	\$190,020	\$15,652	\$24,958	\$5,129	\$8,545	\$4,761	\$932,179
Sales & Excise Taxes	\$481,610	\$243,022	\$43,138	\$42,831	\$534,081	\$384,081	\$31,075	\$51,838	\$11,655	\$18,329	\$6,078	\$1,847,737
<b>Total</b>	<b>\$1,091,349</b>	<b>\$745,005</b>	<b>\$111,812</b>	<b>\$108,138</b>	<b>\$1,516,396</b>	<b>\$995,631</b>	<b>\$78,470</b>	<b>\$130,150</b>	<b>\$26,404</b>	<b>\$43,170</b>	<b>\$22,828</b>	<b>\$4,869,355</b>
<b>SALARIES &amp; WAGES (000's)</b>												
Direct	\$1,011,311	\$693,804	\$108,118	\$99,501	\$1,226,928	\$820,371	\$63,511	\$102,106	\$21,204	\$34,840	\$27,648	\$4,209,343
Indirect	\$413,175	\$294,640	\$35,188	\$39,473	\$594,125	\$319,308	\$25,142	\$44,633	\$10,106	\$12,687	\$6,665	\$1,795,143
<b>Total</b>	<b>\$1,424,486</b>	<b>\$988,444</b>	<b>\$143,306</b>	<b>\$138,974</b>	<b>\$1,821,053</b>	<b>\$1,139,679</b>	<b>\$88,653</b>	<b>\$146,740</b>	<b>\$31,310</b>	<b>\$47,528</b>	<b>\$34,313</b>	<b>\$6,004,486</b>
<b>EMPLOYMENT</b>												
Direct <sup>(3)</sup>	48,421	37,790	7,419	5,483	62,664	43,108	4,089	6,508	1,296	1,838	1,113	219,727
Indirect	11,209	8,281	1,114	1,168	15,762	9,859	693	1,244	288	358	223	50,200
<b>Total</b>	<b>59,631</b>	<b>46,070</b>	<b>8,533</b>	<b>6,651</b>	<b>78,426</b>	<b>52,967</b>	<b>4,782</b>	<b>7,752</b>	<b>1,584</b>	<b>2,195</b>	<b>1,336</b>	<b>269,927</b>

**METHODOLOGY:** This study was completed by PKF Consulting on behalf of the Hotel Association of Canada. The 2004 results are based on operating data from PKF's Trends in the Hotel Industry and PKF's Hotel Industry Supply database, which was revised in 2005 to reflect previously omitted establishments. Non supply change related adjustments made to the hotel inventory database limit comparability between this and the previous year's report.

**NOTE:** PKF's Hotel Inventory utilized for the subject report contains 3,567 establishments offering 336,152 rooms. Only establishments with 30 or more rooms are included. The complete PKF and HAC Supply Database, including properties with fewer than 30 rooms, contains 6,681 establishments and 387,631 rooms.

(1) Includes only those establishments with 30 rooms or more

(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 2003 report multiplied by the 2004 gains in average weekly wages provided by the Conference Board of Canada.

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