



Branded Hotel Inventory in Canada

(as of December 31, 2014)

May 2015

This report may be quoted with an acknowledgement to HLT Advisory.



Introduction

In an effort to stay abreast of the changing hotel landscape in Canada, HLT Advisory Inc. (“HLT”) maintains a database of all hotels in Canada of 30 rooms or more. The database consists of data collected on a hotel-by-hotel basis as well as information acquired from each of the major regional, national and international hotel brands operating in the Canadian marketplace.

The focus of this report is on branded hotels (30 rooms or larger) across all provinces and territories. Data was requested as of December 31, 2014 and are compared with data collected using the same methodology at December 31, 2010, in order to provide an indication of brand changes over a four-year period.

For further information on HLT Advisory, this report and contact details please see the last page.





Background and Definitions

Data were collected in April/May 2015 from representatives of regional, national and international brands operating in the Canadian marketplace. The data and data tables within this report:

- include only hotels containing 30 rooms or more;
- present the number of hotels and number of hotel rooms on a “brand” and “brand family” basis; and
- count individual hotels only once, regardless of whether a specific hotel carries more than one brand. Hotels with dual brands (often in regional centres or where a hotel has partially converted from a regional brand to a national/international brand) are included once and allocated to the brand having the greatest number of rooms.

The following definitions are used throughout the report.

- Hotel - a lodging enterprise offering 30 rooms or more and open on a year-round basis.
- Hotel Brand - is any established and recognized hotel brand that provides a common brand name, central reservation system, physical and operating standards and chain-wide marketing, whether a major international hotel brand (i.e. Marriott, Hilton, Westin), a large national brand (i.e. Delta or Sandman) or a smaller regional brand (i.e. Rodd or Canalta).
- Brand Family – is the “parent” collection of sub brands through which common marketing, loyalty programs and distribution are provided (e.g., Starwood, Choice).
- Brand Chain Scale – refers to the Luxury, Upper Upscale, Upscale, Upper Midscale, Midscale and Economy hotel quality segments that are consistent with the Smith Travel Research (STR Global) Chain Scale classifications.

National Summary

Of the 350,000+ hotel rooms in Canada, some 232,954 rooms in 1,904 hotels carry a regional, national or international brand.

A perspective is provided below on the number of hotels and rooms within various size bands (i.e., number of rooms/hotel). The trend towards increased branding as a proportion of total hotel stock continues.

Branded Hotels in Canada

As of December 31, 2014 (30 rooms or more)

	Hotels	Rooms
30 - 74 Rooms	614	34,025
75 - 99 Rooms	448	38,237
100 - 149 Rooms	452	54,357
150 - 199 Rooms	157	26,901
200 - 249 Rooms	97	21,366
250+ Rooms	136	58,068
TOTAL	1,904	232,954

HLT Canadian Hotel Branding Database, December 2014

Ontario is home to the most branded hotels and hotel rooms, followed by British Columbia and Alberta. Quebec posts the largest average room count per branded hotel, although this likely reflects a greater number of unbranded smaller motels and inns across the province. Hotel inventory in the Northwest Territories, Nunavut and Yukon have been combined into a single "Territories" listing.

Branded Hotels and Rooms by Province

As of December 31, 2014 (30 rooms or more)

	Hotels	Rooms	Rooms/ Hotel
Ontario	614	82,776	135
British Columbia	352	40,948	116
Alberta	392	44,036	112
Quebec	191	28,756	151
Saskatchewan	109	10,890	100
Nova Scotia	62	6,851	111
Manitoba	64	6,778	106
New Brunswick	69	6,550	95
Newfoundland	17	2,337	137
Territories	16	1,266	79
Prince Edward Island	18	1,766	98
TOTAL	1,904	232,954	122

HLT Canadian Hotel Branding Database, December 2014

Canada's ten major metropolitan areas account for just over half of all branded hotel rooms and about one-third of all branded hotels across the country.

Toronto, Vancouver and Montreal (together with the broader metropolitan areas) are the three largest markets consistent with the presence of related tourism infrastructure (busiest international airports, largest convention centres, etc.).

Branded Hotels in Largest 10 Cities

As of December 31, 2014 (30 rooms or more)

	Hotels	Rooms	Rooms/ Hotel
Greater Toronto	165	34,872	211
Greater Vancouver	115	19,153	167
Greater Montreal	71	14,795	208
Edmonton	76	11,065	146
Calgary	74	10,678	144
Niagara Falls Area	44	8,521	194
Ottawa/Hull	36	6,240	173
Winnipeg	39	4,927	126
Quebec City	27	4,580	170
Halifax/Dartmouth	27	3,944	146
TOTAL	674	118,775	176

HLT Canadian Hotel Branding Database, December 2014

Hotels and Hotel Rooms by Brand (at December 31, 2014)

The top 20 hotel brands in Canada represent about two thirds of Canada's branded hotels and branded hotel rooms. Comfort Inns/Comfort Suites is the most prolific individual hotel brand in Canada in terms of both number of properties (150) and number of hotel rooms (12,602). The top sixty hotel brands in Canada (listed in order of number of branded hotel rooms) are presented in the following table.

Largest 60 Hotel Brands in Canada (hotels with 30 rooms or more) December 31, 2014											
	Average				Average				Average		
	Hotels	Rooms	Rooms		Hotels	Rooms	Rooms		Hotels	Rooms	Rooms
Comfort Inn/Suites	150	12,602	84	Four Points by Sheraton	27	3,818	141	InterContinental	3	1,151	384
Best Western Plus	118	11,602	98	Coast Hotels	29	3,639	125	Knights Inn	24	1,135	47
Holiday Inn	62	10,908	176	Hilton Garden Inn	21	3,255	155	Western Budget Motels	12	1,087	91
Delta Hotels and Resorts	38	10,070	265	Radisson Hotels	16	3,095	193	Sutton Hotel Group	3	1,079	360
Fairmont Hotels & Resorts	19	9,931	523	Econo Lodge	54	2,905	54	Lakeview Inns & Suites	16	1,067	67
Holiday Inn Express	92	9,537	104	Residence Inn by Marriott	19	2,771	146	Nova Hotels	12	1,032	86
Days Inn	104	8,771	84	Executive Hotels and Resorts	14	2,079	149	Canad Inns	10	1,012	101
Super 8 Hotels	132	8,707	66	Motel 6	23	2,005	87	Renaissance	3	1,003	334
Sheraton	18	7,988	444	Hyatt Regency	4	1,998	500	Rodd Hotels & Resorts	9	918	102
Ramada	78	7,786	100	Crowne Plaza	7	1,719	246	Four Seasons	3	904	301
Quality Inn	82	7,772	95	Sandman Signature Hotel	7	1,701	243	Staybridge Suites	8	897	112
Travelodge	80	7,645	96	Novotel	7	1,625	232	Clarion	6	828	138
Best Western	70	6,378	91	Chelsea	1	1,590	1,590	Monte Carlo Inns	8	771	96
Westin	15	5,675	378	Fairfield Inn & Suites	14	1,562	112	Heritage Inn Hotels & Convent	8	761	95
Hampton Inn Hotels & Suites	48	5,397	112	Doubletree	7	1,546	221	Alt Hotels	5	760	152
Marriott	15	5,354	357	Homewood Suites	13	1,475	113	Embassy Suites	2	722	361
Sandman Hotel	37	5,082	137	Canalta Hotels	21	1,458	69	Best Canadian Motor Inn	9	715	79
Hilton	13	5,061	389	Hotel Des Gouverneurs	9	1,375	153	Pan Pacific	3	707	236
Courtyard by Marriott	23	4,224	184	Canadas Best Value Inns	28	1,328	47	Prestige Hotels & Resorts	8	702	88
Howard Johnson	58	4,129	71	Les Hotels Jaro	7	1,192	170	Pomeroy Inn and Suites	7	679	97

Source: HLT Canadian Hotel Branding Database, December 2014

Hotels and Hotel Rooms by Brand Family (at December 31, 2014)

Hotel brand families offer more than one discrete hotel brand within a single organization. Some brand families may have as few as two brands; others have as many as twenty operating in one or more countries.

Wyndham, Choice and InterContinental are the three dominant brand families in Canada (measured by total rooms) with each offering more than 20,000 rooms.

The top fifteen brand families account for almost 90% of all branded hotel rooms in Canada.

Top 15 Brand Families and Individual Brands | (30 Rooms or More) | Canada | December 31, 2014

1. Wyndham Hotel Group	Hotels	Rooms	4. Starwood	Hotels	Rooms	8. Delta Hotels & Resorts	Hotels	Rooms
Days Inn	104	8,771	Sheraton	18	7,988	Delta	38	10,070
Super 8 Hotels	132	8,707	Westin	15	5,675			
Ramada	78	7,786	Four Points	27	3,818			
Travelodge	80	7,645	aloft	3	414	9. Fairmont	Hotels	Rooms
Howard Johnson	58	4,129	Element	2	319	Fairmont	19	9,931
Knights Inn	24	1,135	WHotels	1	152			
Microtel Inn & Suites	7	538	Le Meridien	1	108	10. Sandman	Hotels	Rooms
Wingate by Wyndham	3	326	Total	67	18,474	Sandman Hotel	37	5,082
Thriftlodge	6	289				Sandman Signature	7	1,701
Tryp	1	242	5. Best Western	Hotels	Rooms	Sutton Hotel Group	3	1,079
Wyndham Garden	1	152	Best Western Plus	118	11,602	Total	47	7,862
Total	495	39,720	Best Western	70	6,378			
			Best Western Premier	4	371	11. Carlson	Hotels	Rooms
2. Choice	Hotels	Rooms	Total	192	18,351	Radisson Hotels	16	3,095
Comfort Inn	150	12,602				Country Inn & Suites	8	662
Quality Inn	82	7,772	6. Hilton	Hotels	Rooms	Park Inn	3	361
Econo Lodge	54	2,905	Hilton	13	5,061	Total	27	4,118
Clarion	6	828	Hampton Inn	48	5,397			
Ascend	7	490	Hilton Garden Inn	21	3,255	12. Coast Hotels	Hotels	Rooms
MainStay Suites	2	219	Doubletree	7	1,546	Coast Hotels	29	3,639
Sleep Inn	3	194	Homewood Suites	13	1,475			
Suburban	2	177	Embassy Suites	2	722	13. Hyatt	Hotels	Rooms
Rodeway Inn	3	150	Total	104	17,456	Hyatt Regency	4	1,998
Total	309	25,337				Park Hyatt	1	336
			7. Marriott	Hotels	Rooms	Total	5	2,334
3. InterContinental	Hotels	Rooms	Marriott	15	5,354			
Holiday Inn	62	10,908	Courtyard by Marriott	23	4,096	14. Executive	Hotels	Rooms
Holiday Inn Express	92	9,537	Residence Inn	20	2,928	Executive	14	2,079
Crowne Plaza	7	1,719	Fairfield Inn & Suites	14	1,562			
InterContinental	3	1,151	Renaissance	3	1,003	15. Chelsea Hotel	Hotels	Rooms
Staybridge Suites	8	897	TownePlace Suites	4	518	Chelsea Toronto	1	1,590
Hotel Indigo	2	226	Ritz-Carlton Hotels	2	396			
Candlewood Suites	1	145	SpringHill Suites	2	299			
Total	175	24,583	Autograph Collection	1	233			
			JW Marriott	1	221			
			Total	85	16,610			

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Hotel and Room Gains/Losses by Brand and Brand Family (December 31, 2014/2010)

Several significant changes have occurred in the branding landscape since HLT's 2010 inventory, notably:

- Marriott added the most rooms to its inventory while Wyndham added the most hotels within the four-year period.
- Hilton was the second most active brand family with 3,141 new rooms.
- Hampton Inn, Holiday Inn Express and Days Inn were the individual brand leaders.
- Delta lost the most rooms.

Marriott's acquisition of Delta Hotels and Resorts (which closed in 2015 so not included in the Marriott tally) will vault Marriott into the second largest brand family measured in number of rooms and fifth largest by number of hotels.

Changes to hotel inventory include both new build and conversions.

Change in Hotel and Hotel Room Count by Brand Family (2014/2010) | Top 10 Brand Families

	December 31, 2014		December 31, 2010		Variance (2014/2010)	
	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms
Wyndham Hotel Group	494	39,720	457	37,018	37	2,702
Choice Hotels International	309	25,337	288	24,114	21	1,223
InterContinental Hotels Group	175	24,583	155	22,875	20	1,708
Starwood Hotels & Resorts	67	18,474	58	17,306	9	1,168
Best Western	192	18,351	176	16,588	16	1,763
Hilton Hotels Corporation	104	17,456	81	14,315	23	3,141
Marriott Hotels & Resorts	85	16,707	60	12,468	25	4,239
Fairmont Raffles Hotels	19	9,931	20	10,165	-1	-234
Sandman Hotels and Inns	47	7,862	40	5,957	7	1,905
Carlson Hotels Worldwide	27	4,118	36	5,158	-9	-1,040

HLT Canadian Hotel Branding Database, December 31, 2014 and 2010

Change in Hotel and Hotel Room Count by Brand (2014/2010) | Top 20 Individual Brands

	December 31, 2014		December 31, 2010		Variance (2014/2010)	
	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms
Comfort Inn/Suites	150	12,602	147	12,468	3	134
Best Western (all sub brands)	192	18,351	186	16,929	6	1,422
Holiday Inn	62	10,908	60	11,005	2	-97
Delta Hotels and Resorts	38	10,070	45	13,019	-7	-2,949
Fairmont Hotels & Resorts	19	9,931	20	10,165	-1	-234
Holiday Inn Express	92	9,537	76	7,884	16	1,653
Days Inn	104	8,771	84	7,334	20	1,437
Super 8 Hotels	132	8,707	126	8,201	6	506
Sheraton	18	7,988	17	7,675	1	313
Ramada	78	7,786	67	6,892	11	894
Quality Inn	82	7,772	75	7,594	7	178
Travelodge	80	7,645	87	8,219	-7	-574
Westin	15	5,675	15	5,675	0	0
Hampton Inn Hotels & Suites	48	5,397	33	3,685	15	1,712
Marriott	15	5,354	13	4,836	2	518
Sandman Hotel	37	5,082	35	4,755	2	327
Hilton	13	5,061	15	5,314	-2	-253
Courtyard by Marriott	23	4,224	16	2,846	7	1,378
Howard Johnson	58	4,129	56	4,221	2	-92

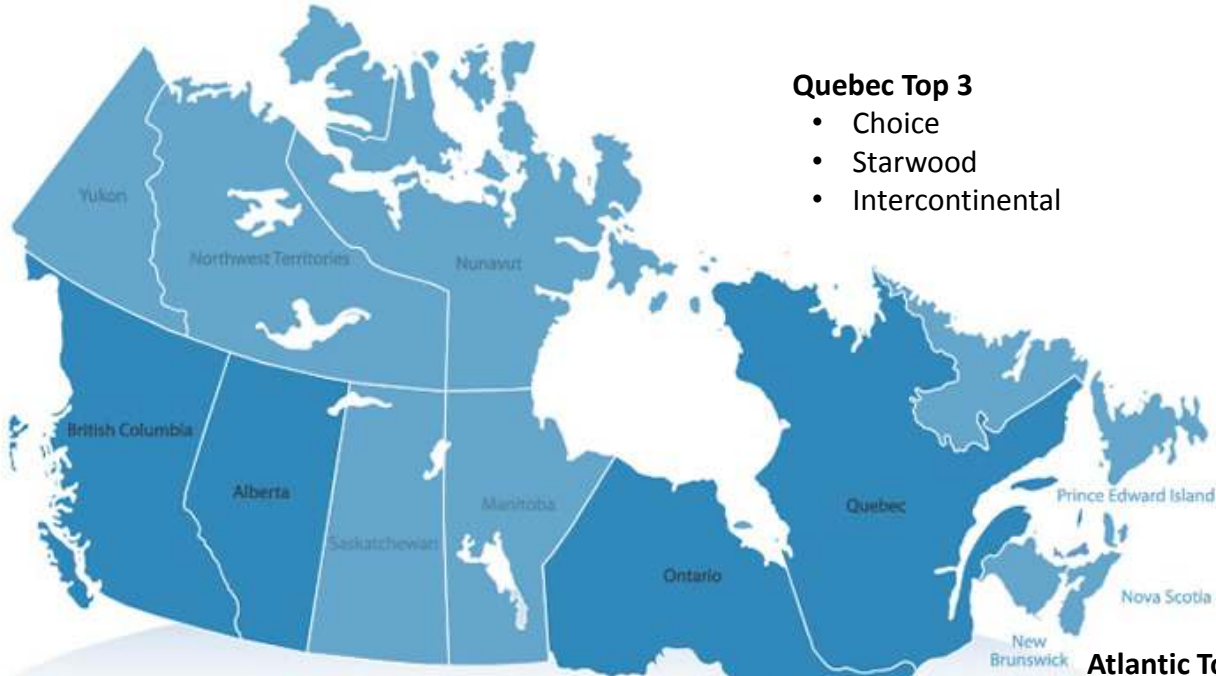
Source: HLT Canadian Hotel Branding Database, December 2014 and December 2010



Leading Brand Families by Region (at December 31, 2014)

No brand family is among the top three brands in every region in Canada. However, Choice, Intercontinental and Wyndham appear in the Top 3 in four of the five regions.

- B.C./Alberta Top 3**
- Wyndham
 - Best Western
 - Intercontinental



- Quebec Top 3**
- Choice
 - Starwood
 - Intercontinental

- Saskatchewan/Manitoba Top 3**
- Wyndham
 - Choice
 - Intercontinental

- Ontario Top 3**
- Wyndham
 - Intercontinental
 - Choice

- Atlantic Top 3**
- Delta
 - Choice
 - Wyndham

Branded Hotel Rooms by Chain Scale | Province & Territory

(at December 31, 2014)

Of all branded hotel rooms in Canada some 140,426 (about 60%) are classified (using STR chain scale categories) as either Economy, Midscale and Upper Midscale quality segments, down from 65% in 2010. The Upscale (e.g. Doubletree, Courtyard, Four Points), Upper Upscale (e.g. Hilton, Marriott, Westin) and Luxury (e.g. Four Seasons, Fairmont, W Hotel) quality segments represent 20%, 14% and 6% respectively of branded hotel rooms.

Branded Hotel Room Chain Scale Allocation by Province							
	Luxury	Upper Upscale	Upscale	Upper Midscale	Midscale	Economy	Total
Alberta	2,369	3,465	6,239	11,995	8,452	11,516	44,036
British Columbia	3,605	7,953	6,719	11,475	5,477	5,719	40,948
Manitoba	340	160	2,001	2,190	714	1,373	6,778
New Brunswick	-	430	1,599	1,934	1,359	1,228	6,550
Newfoundland	-	301	489	904	421	222	2,337
Northwest Territories	-	-	59	-	97	254	410
Nova Scotia	-	662	1,524	2,456	871	1,338	6,851
Nunavut	-	-	-	-	117	-	117
Ontario	4,134	13,574	20,635	22,756	9,269	12,408	82,776
Prince Edward Island	-	-	211	210	471	874	1,766
Quebec	3,625	5,598	4,817	7,934	4,836	1,946	28,756
Saskatchewan	-	249	1,688	2,427	2,422	4,104	10,890
Yukon	-	-	82	356	99	202	739
Total	14,073	32,392	46,063	64,637	34,605	41,184	232,954

Source: HLT Canadian Hotel Branding Database | December 2014

Branded Hotel Rooms by Chain Scale | 10 Largest Cities (at December 31, 2014)

More than 40% of the hotel rooms in Vancouver and Montreal are classified as Luxury or Upper Upscale (higher than any of the other ten cities). The hotel inventory in each of Edmonton, Niagara Falls and Quebec City is 32% to 35% Economy or Midscale.

Branded Hotel Room Chain Scale Allocation by Major City							
	Luxury	Upper Upscale	Upscale	Upper Midscale	Midscale	Economy	Total
Greater Toronto	3,484	8,532	11,789	6,448	2,454	2,165	34,872
Greater Vancouver	2,305	5,744	2,937	5,212	1,504	1,451	19,153
Greater Montreal	2,077	4,384	2,773	3,134	1,475	952	14,795
Edmonton	198	1,188	2,889	3,200	1,651	1,939	11,065
Calgary	405	2,036	2,202	3,136	1,285	1,614	10,678
Niagara Falls Area	-	2,986	1,616	985	1,185	1,749	8,521
Ottawa/Hull	429	1,212	2,018	1,392	248	941	6,240
Winnipeg	340	160	1,750	1,972	283	422	4,927
Quebec City	618	742	749	892	1,468	111	4,580
Halifax/Dartmouth	-	662	1,194	1,199	478	411	3,944
Total	9,856	27,646	29,917	27,570	12,031	11,755	118,775

Source: HLT Canadian Hotel Branding Database | December 31, 2014



About HLT Advisory Inc.

HLT Advisory Inc. (“HLT”) is widely-recognized as one of Canada’s leading hospitality, leisure and tourism industry advisory firms. HLT was formed in 2005 by Lyle Hall and Rob Scarpelli. Prior to the creation of HLT, Lyle was Managing Director/Partner of KPMG’s National Hospitality and Leisure practice area and Rob was Managing Director/Partner of PricewaterhouseCoopers’ National Hospitality and Leisure practice area. Both Lyle and Rob left their respective partnerships and formed HLT Advisory Inc.. HLT’s core competencies are in the following sectors:

- Lodging – HLT has worked across Canada, and internationally, for a cross section of hotel companies focusing on development, marketing and operations planning for major mixed-use projects.
- Gaming – HLT has played a significant role in the growth and development of the Canadian gaming industry through involvement, in one fashion or another, with almost every major land-based gaming project in every region of Canada, over the past two decades.
- Tourism and attractions – HLT provides strategic planning, operations, market analysis and marketing support to major attractions and events as well as assisting the public sector in the development of tourism marketing and investment plans and Request for Proposal processes.
- Convention Centres – HLT has unsurpassed qualifications in the meeting and exhibition industry including preparation of market substantiation assignments for almost every major Canadian convention centre/tradeshow facility (and corresponding economic impact assessments) opened over the past two decades (as well as several in the planning stages).
- Sports and Entertainment Facilities - HLT has worked on numerous spectator and community sports/entertainment venues preparing market assessments and business plans as well as providing acquisition and related transaction services.

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