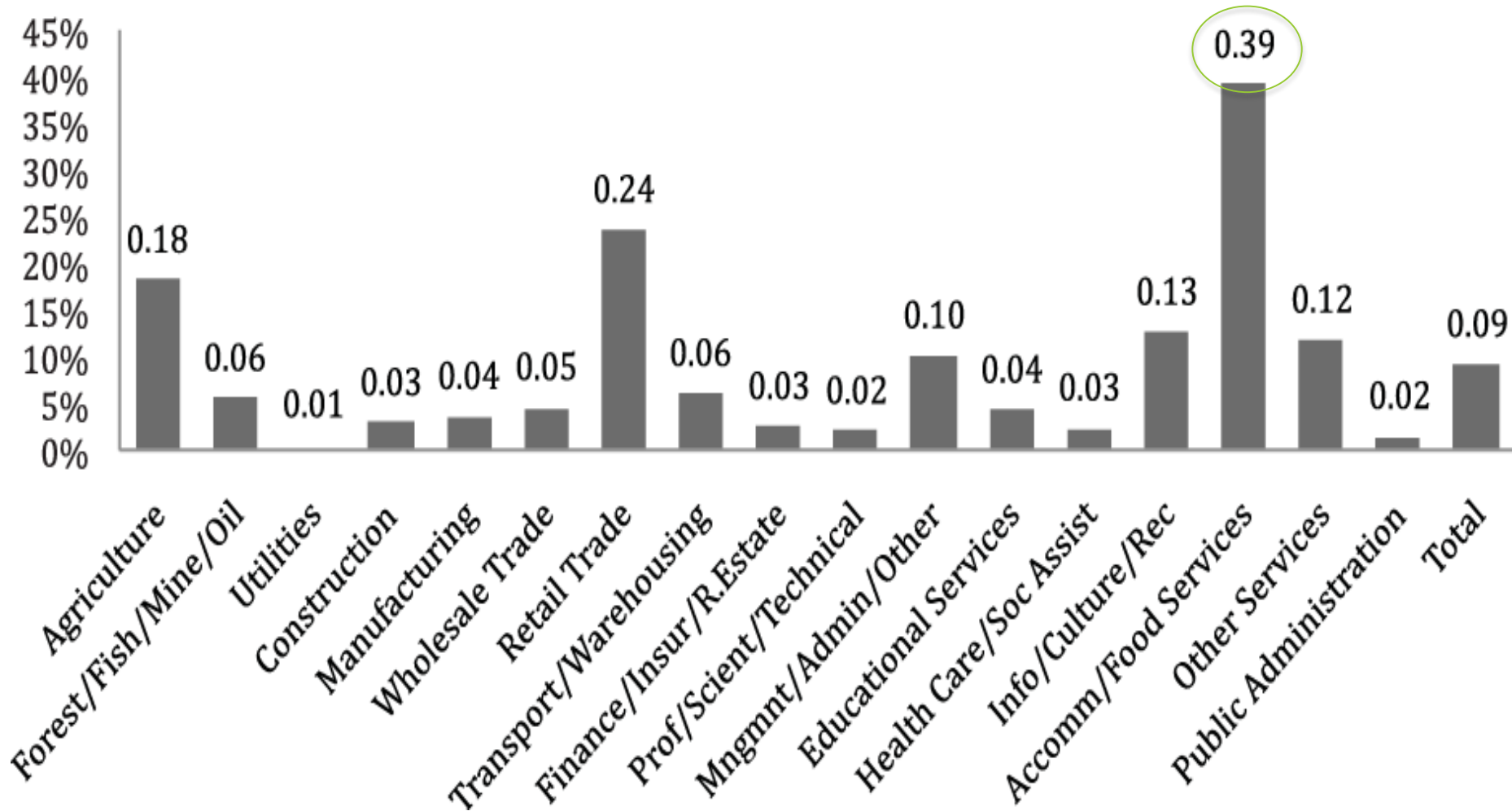


Ontario Hospitality Performance

Ontario Restaurant Hotel & Motel Presentation



Chart 1. Share of Minimum Wage Workers by Industry: Ontario (2012)



Minimum Wage vs CPI

YEAR	CPI – Ontario	
	CPI % Change	% Change in Minimum Wage
2004	2.11	4.3%
2005	2.56	4.2%
2006	1.90%	4.0%
2007	2.00%	3.2%
2008	2.50%	9.4%
2009	0.40%	8.6%
2010	2.80%	7.9%
2011	3.60%	0
2012	1.70%	0
2013	1.2%	0
2014	2.8%	7.3%

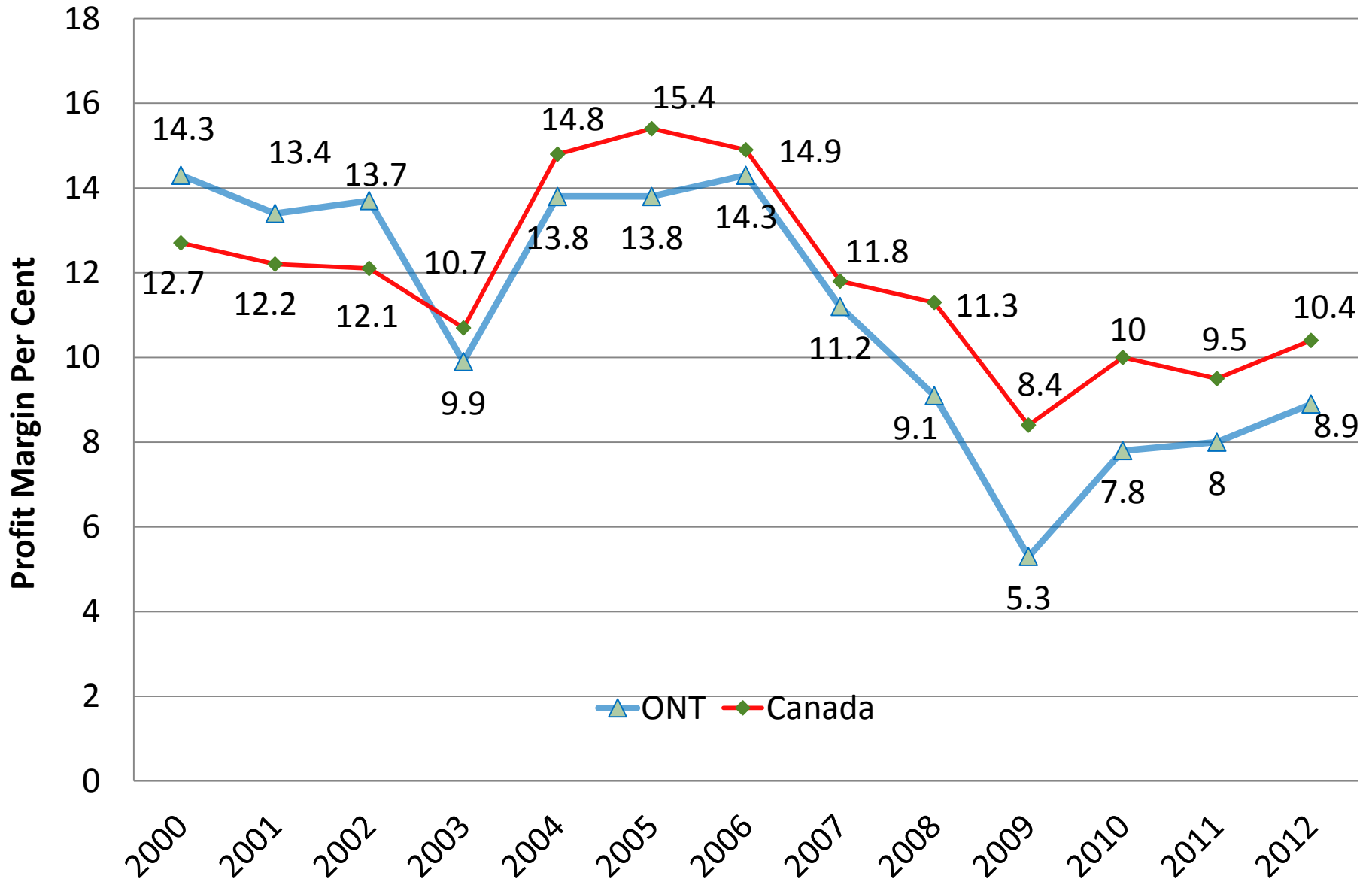
2004 – 2010
Up 15.36%

2004 – 2010
Up 50%

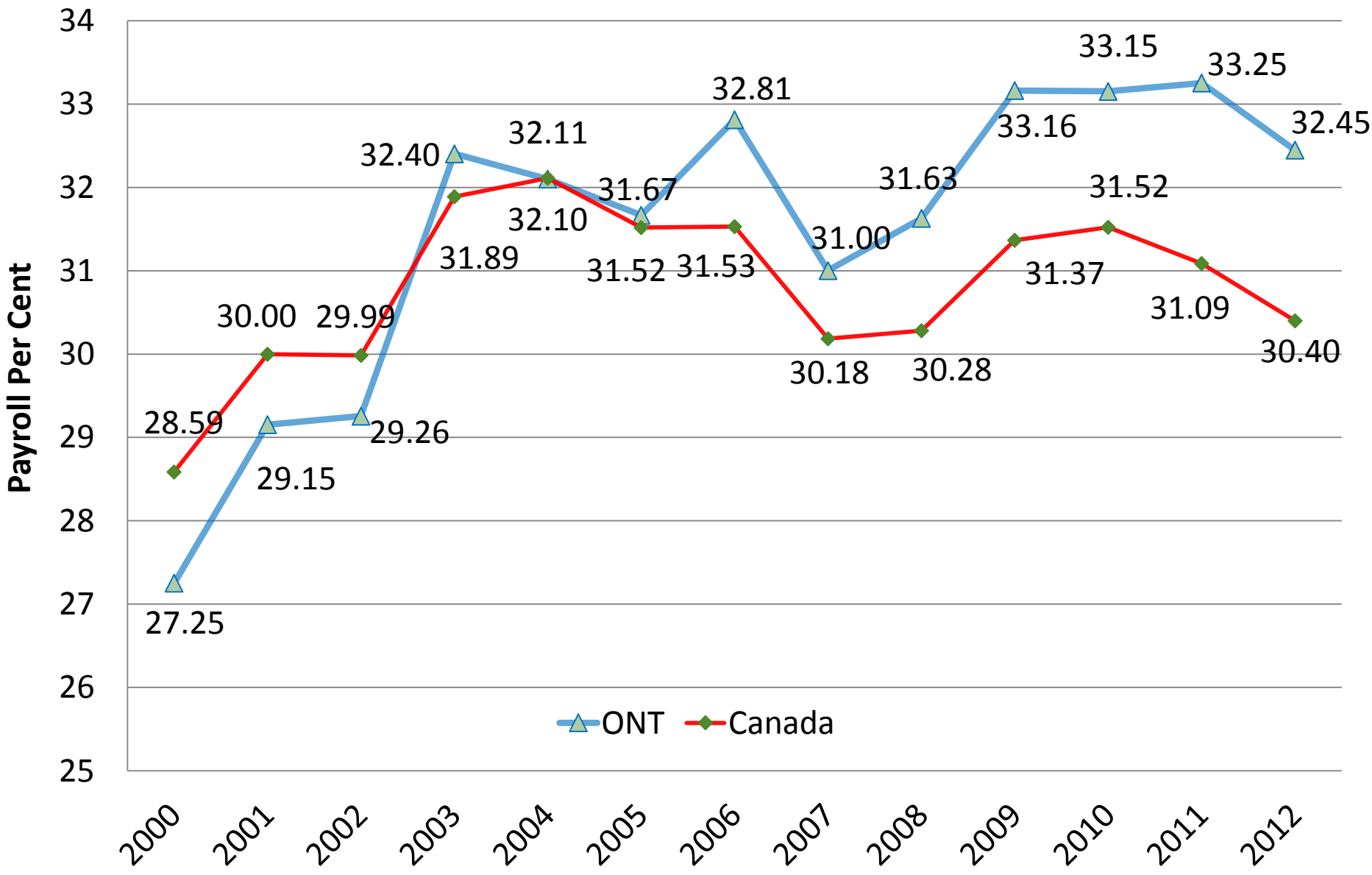
2004 – 2010
Up 5.7%

2004 – 2010
Up 7.3%

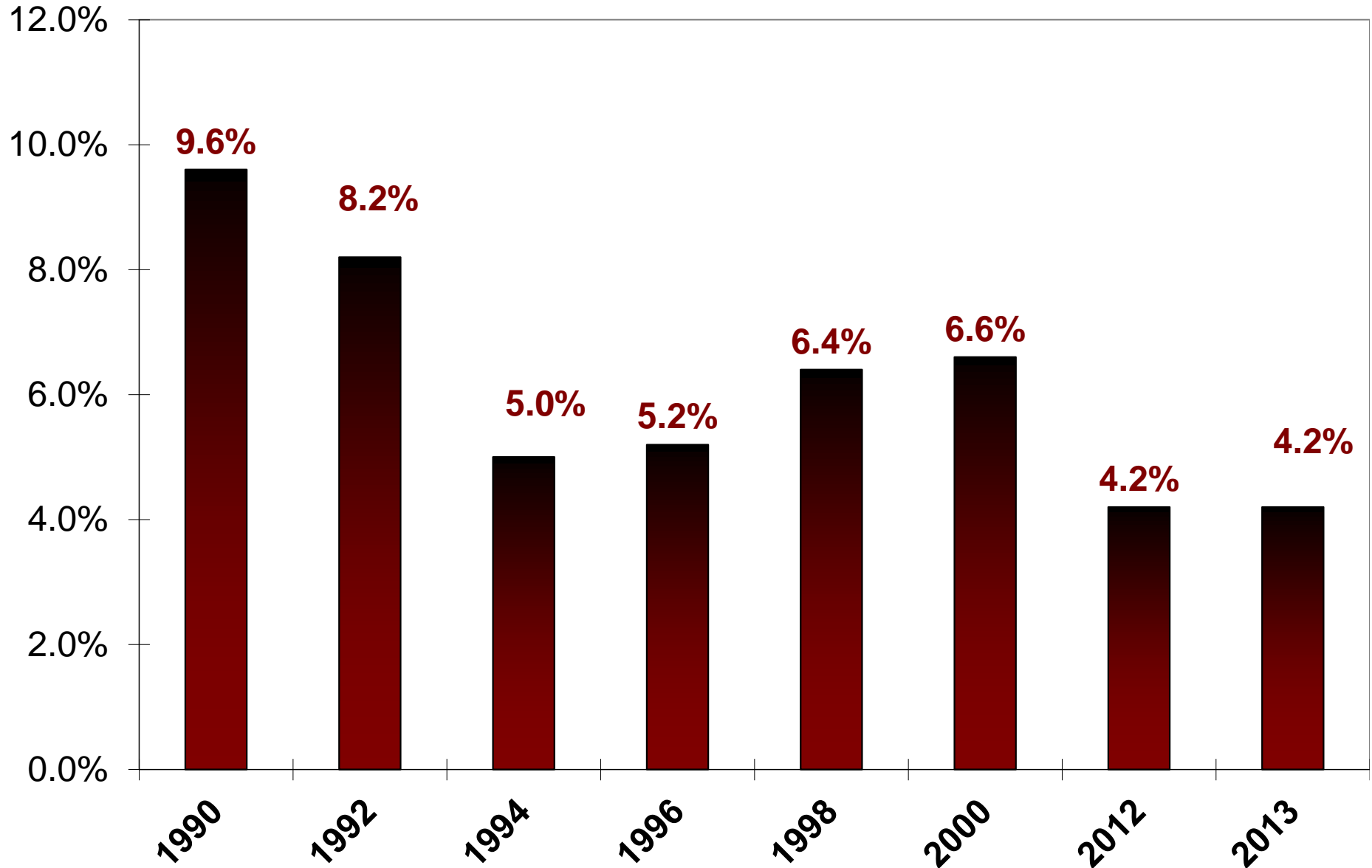
Canadian Provinces Accommodations Profit Margins



Canadian Provinces Accommodations Payroll % Cost

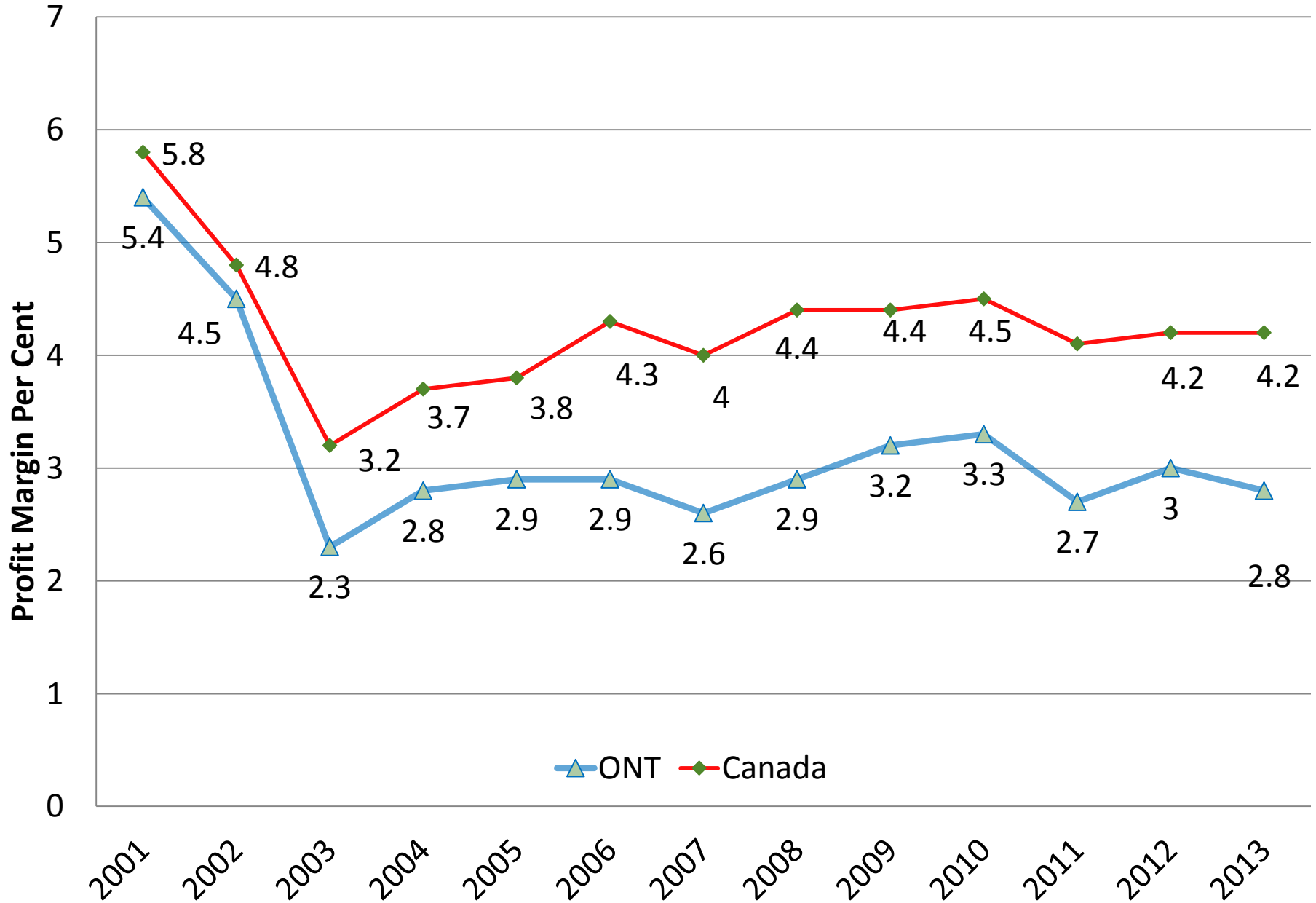


Canada Total Foodservice Margins

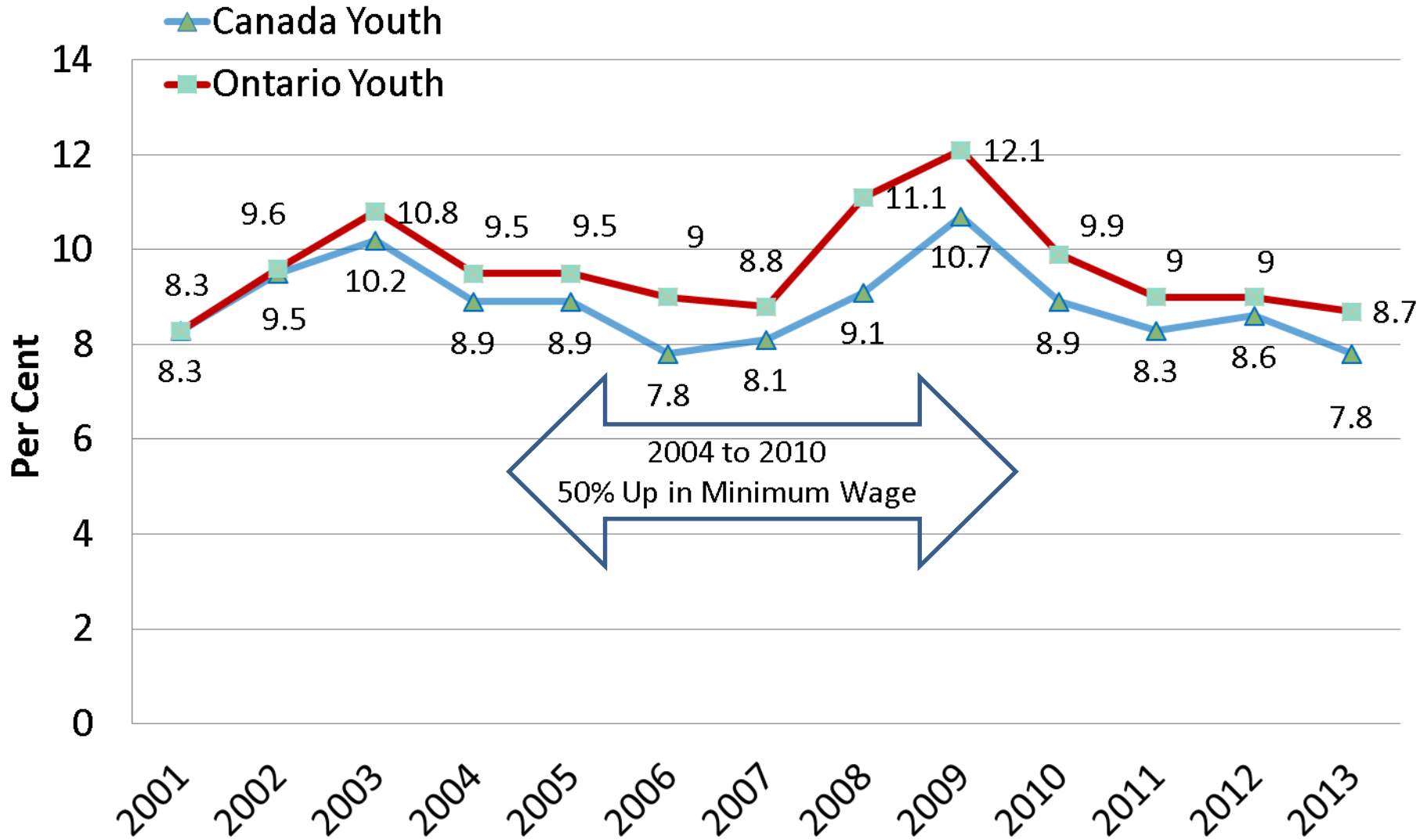


ORHMA, CRFA, and Statistics Canada

Ontario vs National Foodservice Margins



Ontario Youth Unemployment vs National



Hospitality Margins vs Total Youth Unemployment

▲ Foodservice Profit Margin

◆ Hotels Profit Margin

