CAMPING INDUSTRY PORTRAIT IN CANADA AND ONTARIO

CAMPING MARKET

Total number of campsites by level of service for overnight campers

![Bar chart showing the total number of campsites by level of service for overnight campers in Canada and Ontario.]

Most common infrastructure in campgrounds

- Children’s playground: Canada 78, Ontario 83
- Community shelter: Canada 64, Ontario 66
- Snack bar/Convenience store: Canada 49, Ontario 58
- Beach: Canada 43, Ontario 56
- Basketball court: Canada 29, Ontario 46
- Pool: Canada 26, Ontario 35

Ontario campgrounds stand out with more infrastructure.

Most requested new services in Canadian campgrounds

- Wireless Internet
- Pool and water play area
- Better electrical grid
- Addition or renovation of comfort stations

Total number of campgrounds and campsites

4,231 campgrounds, 423,283 campsites
Canadian camper profile

- Gender:
  - Male: 46%
  - Female: 54%

- Age distribution:
  - 18-24: 11%
  - 25-34: 27%
  - 35-44: 19%
  - 45-54: 19%
  - 55-64: 15%
  - 65+: 9%

- Family income distribution:
  - <$40k: 24%
  - $40k to $80k: 17%
  - $80k to $100k: 16%
  - $100k to $150k: 5%

- Motivations to go camping:
  - Enjoying nature: 54%
  - Freedom sensation: 27%
  - Vacations and rest: 19%
  - Social aspect: 19%

- Type of campground visited in 2014:
  - Provincial: 54%
  - Private: 51%
  - Municipal: 18%
  - Federal: 18%

- Most popular camping activities:
  - Costs: 31%
  - Independence: 18%
  - Discovering a region: 17%

- Type of equipment mostly used in 2014 by Canadian campers:
  - Tent: 55% (66% in Ontario)
  - Trailer: 16% (13% in Ontario)
  - Tent-trailer: 8% (9% in Ontario)
  - Fifth wheel: 8% (4% in Ontario)
  - Motorhome: 6% (3% in Ontario)

- Camping trips per year:
  - On average: 4

- Campgrounds visited in 2014:
  - On average: 3

- Average distance from home:
  - Less than 300 km: 73%
CAMPER MARKET

Services expected directly on the campsite by Canadian campers

- **Drinkable water**: 71% (72% in Ontario)
- **Electricity**: 68% (62% in Ontario)
- **Sewer**: 34% (28% in Ontario)
- **Wi-Fi**: 27% (23% in Ontario)
- **None**: 18% (17% in Ontario)

10 most important criteria used to select a campground

- **Beauty**: 56% (Canada), 48% (Ontario)
- **Cleanliness**: 53% (Canada), 46% (Ontario)
- **Price**: 51% (Canada), 52% (Ontario)
- **Privacy**: 48% (Canada), 48% (Ontario)
- **Drinkable water**: 45% (Canada), 38% (Ontario)
- **Safe environment**: 44% (Canada), 44% (Ontario)
- **Tree cover**: 43% (Canada), 36% (Ontario)
- **Quietness**: 42% (Canada), 30% (Ontario)
- **Campsite size**: 39% (Canada), 36% (Ontario)
- **Easy to reserve**: 32% (Canada), 29% (Ontario)

Preferred channels for reservation

- **Telephone**: 47% (40% in Ontario)
- **Campground website**: 34% (38% in Ontario)
- **Email**: 10% (12% in Ontario)

Reservation time

- Did not reserve: 25% (Ontario: 23%)
- Less than 4 weeks: 33% (Ontario: 28%)
- 1 to 3 months: 23% (Ontario: 21%)
- Over 3 months: 19% (Ontario: 17%)

Using the web to plan a stay

- **Canada**: 60%
- **Ontario**: 64%

Type of website used to select a campground

- **Provincial park**: 57% (Ontario: 69)
- **Federal park**: 30% (Ontario: 31)
- **Campground directories other than PCA**: 22% (Ontario: 10)
- **Provincial campground association**: 19% (Ontario: 21)
- **TripAdvisor**: 13% (Ontario: 17)
- **Social media**: 6% (Ontario: 5)
- **Campground website**: 2% (Ontario: 1)
- **Search engine**: 1% (Ontario: 0)
- **None**: 8% (Ontario: 7)

For how many years do you think you will be camping?

- **Average in years**
  - **Canada**: 21.4
  - **Ontario**: 23.2
**ECONOMIC IMPACT**

<table>
<thead>
<tr>
<th>Indicators</th>
<th>RV Retail</th>
<th>RV Manufacturing</th>
<th>Travel Expenditures</th>
<th>Other expenses</th>
<th>Total Canada</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Initial Expenditures</strong></td>
<td>$762M</td>
<td>$310M</td>
<td>$2.0G</td>
<td>$848M</td>
<td>$3.9G</td>
</tr>
<tr>
<td>Campers direct and indirect expenses, RV dealers profit margin, RV manufacturing sales.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td><strong>Gross Output</strong></td>
<td>$1.6G</td>
<td>$638M</td>
<td>$4.0G</td>
<td>$1.8G</td>
<td>$8.1G</td>
</tr>
<tr>
<td>Gross expenses of all product and service providers, induced expenses due to increase of economic activity.</td>
<td></td>
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</tr>
<tr>
<td><strong>Wages and Salaries</strong></td>
<td>$645M</td>
<td>$265M</td>
<td>$1.4G</td>
<td>$633M</td>
<td>$2.9G</td>
</tr>
<tr>
<td>Workforce salaries and social benefits</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Jobs</strong></td>
<td>11,550</td>
<td>3,290</td>
<td>31,800</td>
<td>13,780</td>
<td>60,420</td>
</tr>
<tr>
<td>Total number of employees, based on a full time week of 40 hours over a one year period (FTE).</td>
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</tr>
<tr>
<td><strong>Tax Income</strong></td>
<td>$233M</td>
<td>$61M</td>
<td>$501M</td>
<td>$241M</td>
<td>$1.0G</td>
</tr>
<tr>
<td>Sales tax and income taxes.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>GDP Basic Price</strong></td>
<td>$977M</td>
<td>$264M</td>
<td>$2.4G</td>
<td>$1.0G</td>
<td>$4.7G</td>
</tr>
</tbody>
</table>

*Numbers were rounded.

In Ontario, the camping industry contributes around $1.2 billion dollars to the GDP.

**METHODOLOGY**

**Campground Market**
- Campground census based on available data (Provincial campground associations database, provincial tourism guides, online campground directories).
- Telephone survey with owners and managers of 498 privately owned campgrounds, not-for-profit campgrounds and campgrounds owned by municipalities.
- Email survey with Parks Canada, provincial agencies and provincial government ministries that manage publicly owned campgrounds.

**Camper Market**
- Web panel survey with 1,047 campers Canada-wide, 214 in Ontario.

**Economic Impact**
- Camper survey data.
- Statistics Canada data (RV sales and manufacturer revenues).
- Economic impact analysis based on the Input/Output model of Statistics Canada.

**BACKGROUND**

The Canadian Camping and RV Council (CCRVC) represents the RV Manufacturers Association, the RV Dealers Association and the campground owners associations from across Canada. Its mission is the betterment and support of the camping and RV industry in Canada. The CCRVC sponsored this study, which will be made available on its website.

SOM is a market research company, specialized in data collection and analysis. It was responsible of coordinating the study and for data collection and analysis of the campground and camper surveys.

WSP is an international consulting group. In this study, WSP was responsible of the estimation of the economic impact of the Canadian camping industry.

www.ccrvc.ca