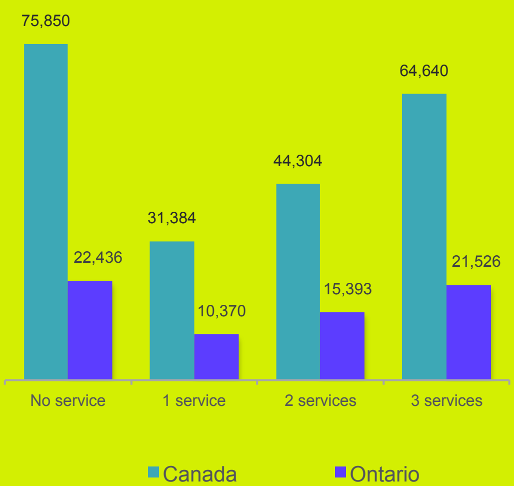
CAMPING INDUSTRY PORTRAIT IN CANADA AND ONTARIO

CAMPGROUND MARKET

CANADIAN CAMPING AND RV COUNCIL
CONSEIL CANADIEN DU CAMPING ET DU VR
som
WSP

Total number of campsites by level of service for overnight campers



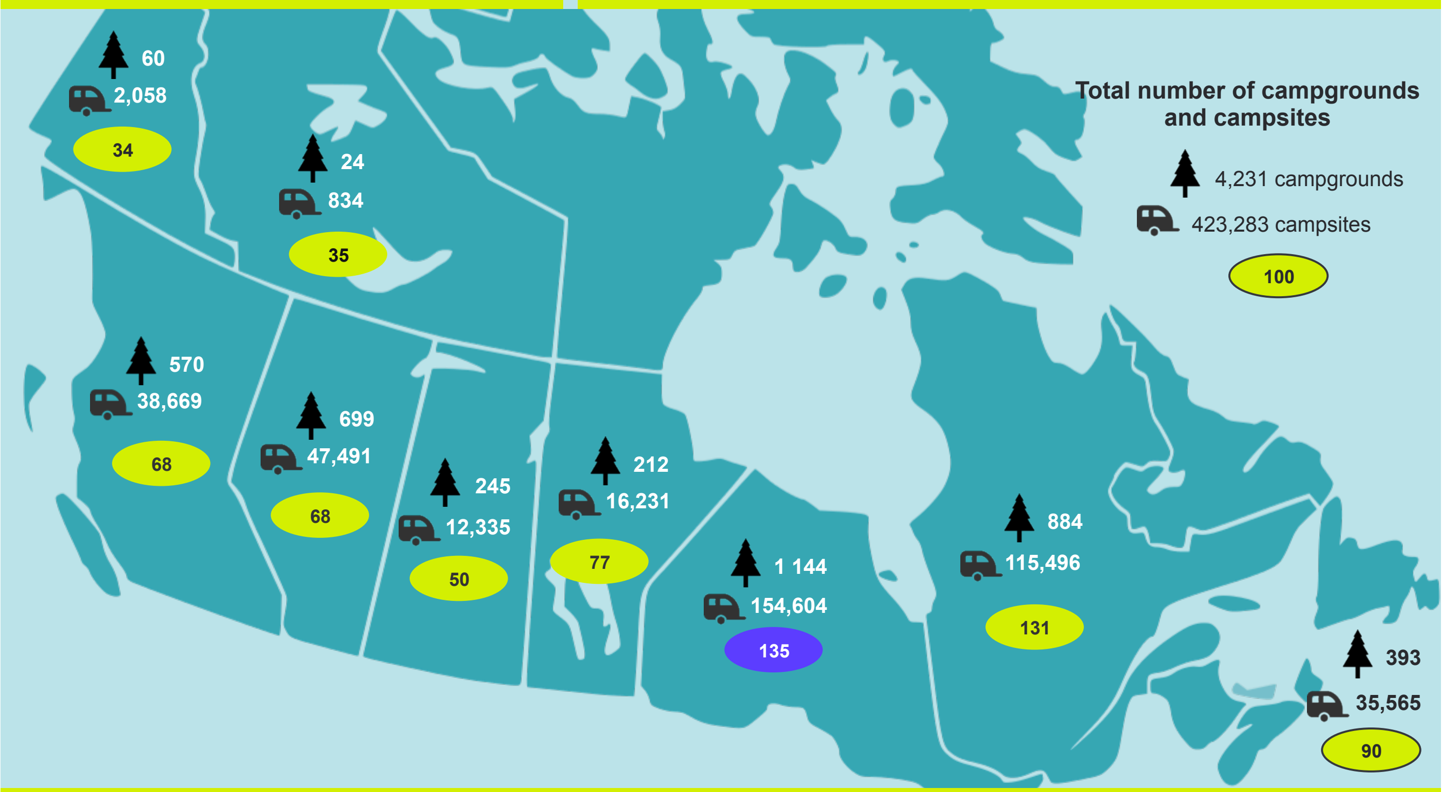
Most common infrastructure in campgrounds

	Canada (%)	Ontario (%)
Children's playground	78	83
Community shelter	64	66
Snack bar/Convenience store	49	58↑
Beach	43	56↑
Basketball court	29	45↑
Pool	28	35↑

↓ Ontario campgrounds stand out with more infrastructure

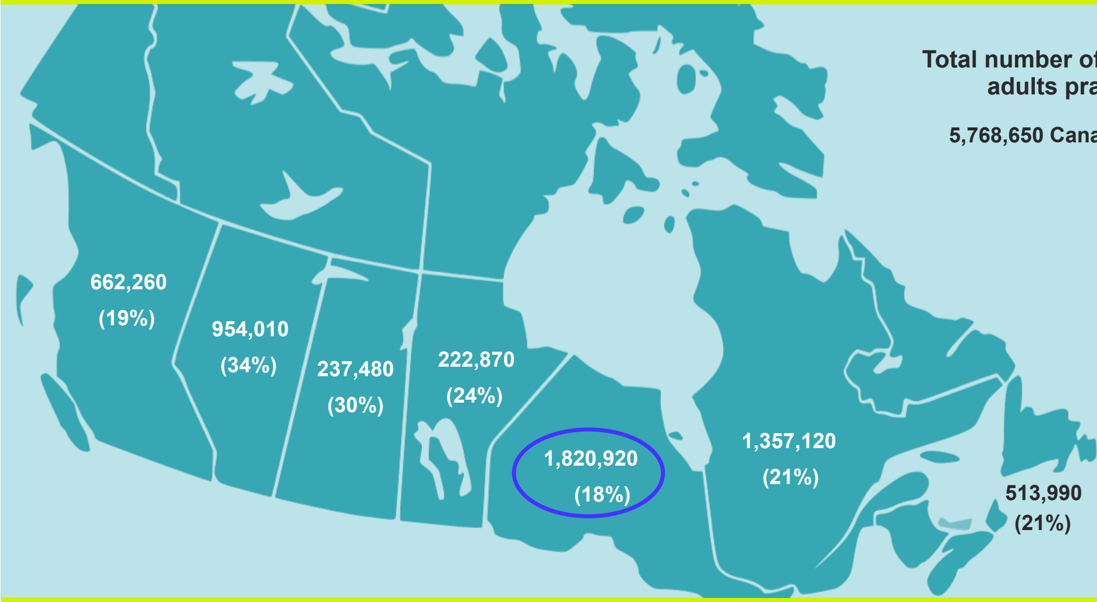
Most requested new services in Canadian campgrounds

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



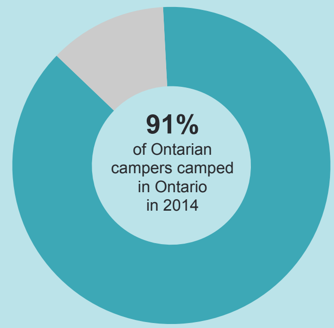
Campgrounds   Campsites   68 Average number of campsites per campground

CAMPER MARKET

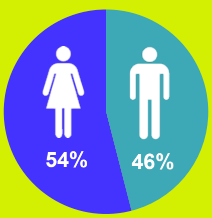


Total number of campers and rates of adults practicing camping

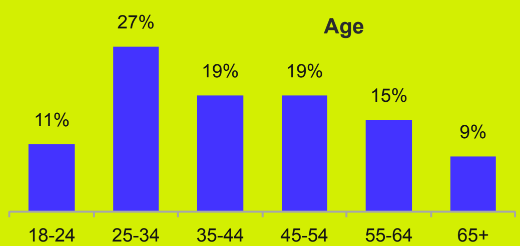
5,768,650 Canadian campers (22%)

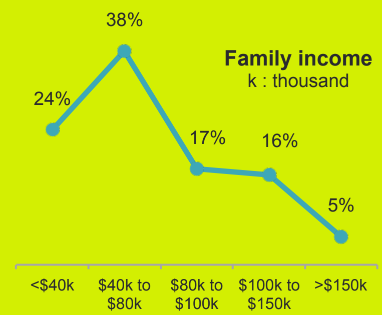


Canadian camper profile



Gender





4 camping trips per year on average

in

3 different campgrounds on average

less than

300 km from home(73 %)

Motivations to go camping

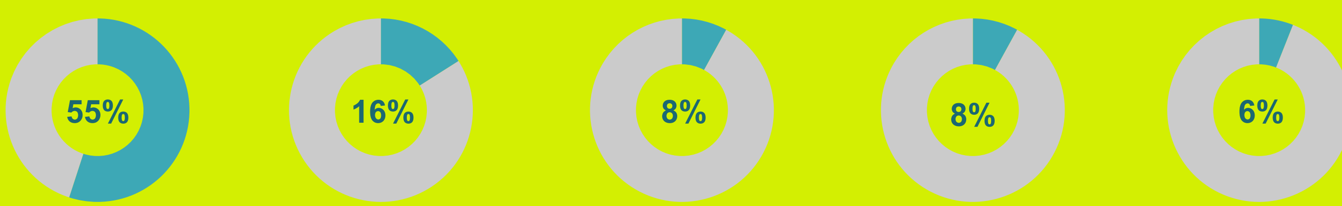
Independence
Freedom sensation
Enjoying nature
Vacation, rest
Social aspect
Costs
Discovering a region

Type of campground visited in 2014

Provincial	54%
Private	51%
Municipal	18%
Federal	18%

Most popular camping activities

Type of equipment mostly used in 2014 by Canadian campers



Tent (66% in Ontario)

Trailer (13% in Ontario)

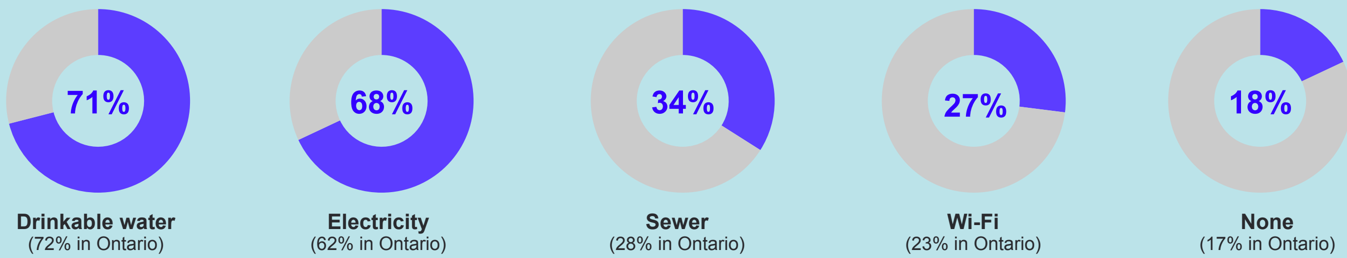
Tent-trailer (9% in Ontario)

Fifth wheel (4% in Ontario)

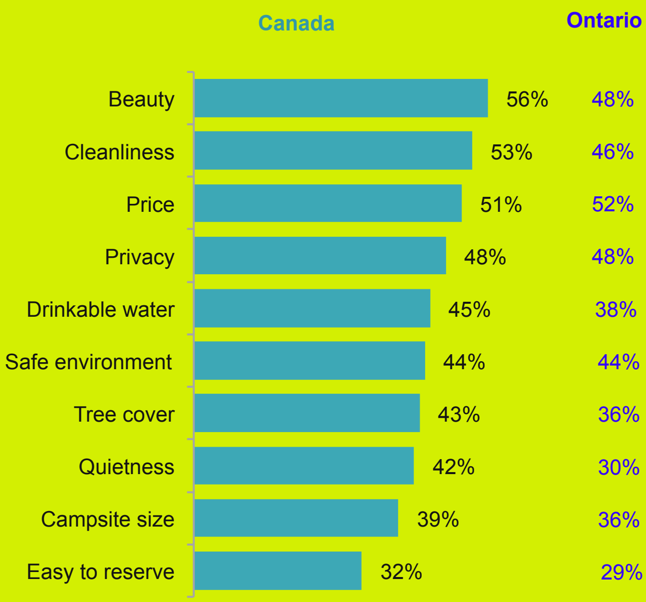
Motorhome (3% in Ontario)

CAMPER MARKET

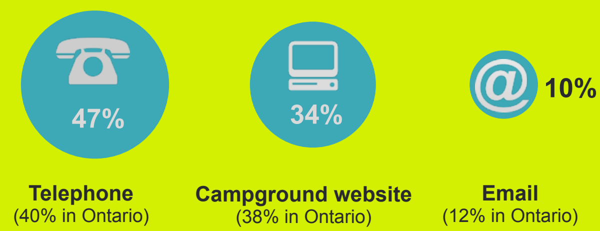
Services expected directly on the campsite by Canadian campers



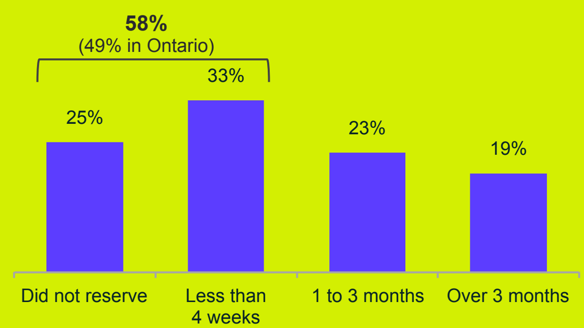
10 most important criteria used to select a campground



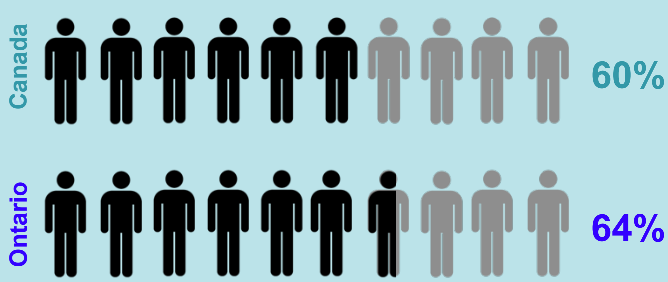
Preferred channels for reservation



Reservation time



Using the web to plan a stay



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

21.4 Canada

23.2 Ontario

Type of website used to select a campground

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

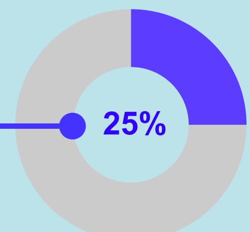
$ ECONOMIC IMPACT

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

**Numbers were rounded.*

M : Million – G : Billion

Indicators	Ontario
Initial Expenditures	**$1.0G**
Gross Output	**$2.0G**
Wages and Salaries	**$690M**
Jobs	**15,076**
Tax Income	**$294M**
GDP Basic Price	**$1.2G**



Ontario provides 25% of the Canadian camping industry jobs

« 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

CANADIAN CAMPING AND RV COUNCIL
CONSEIL CANADIEN DU CAMPING ET DU VR

www.ccrvc.ca

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..