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2023 ECONOMIC IMPACT OF THE CANADIAN RECREATION VEHICLE INDUSTRY - REVISED

PREPARED BY THE PORTAGE GROUP INC. & PARCEL ECONOMICS INC.



About Recreation Vehicle Dealers Association

The Recreation Vehicle Dealers Association of Canada (RVDA) is a national federation which exists to protect and promote the interests and welfare of RV Dealers across Canada to enable the industry to maximize its potential. The core objective of the RVDA of Canada is to bring together and represent the retail businesses involved in the recreation vehicle industry across Canada, thus providing the support and strength to protect and promote the interests and welfare of Canadian RV Dealers, and to maximize the potential of the industry for all involved.

About The Canadian Recreational Vehicle Association

The Canadian Recreational Vehicle Association (CRVA) is a non-profit organization comprised of leading Recreational Vehicle Manufacturers and Suppliers of the components that go into Recreational Vehicles that are sold in Canada. CRVA has been in existence for over 40 years and works continually to promote all aspects pertaining to the quality and safety in the RVs built by its member companies. The Association ensures a continuity of professional standards beneficial to the RV industry and, ultimately, in the best interest of the consumer.

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Disclaimer

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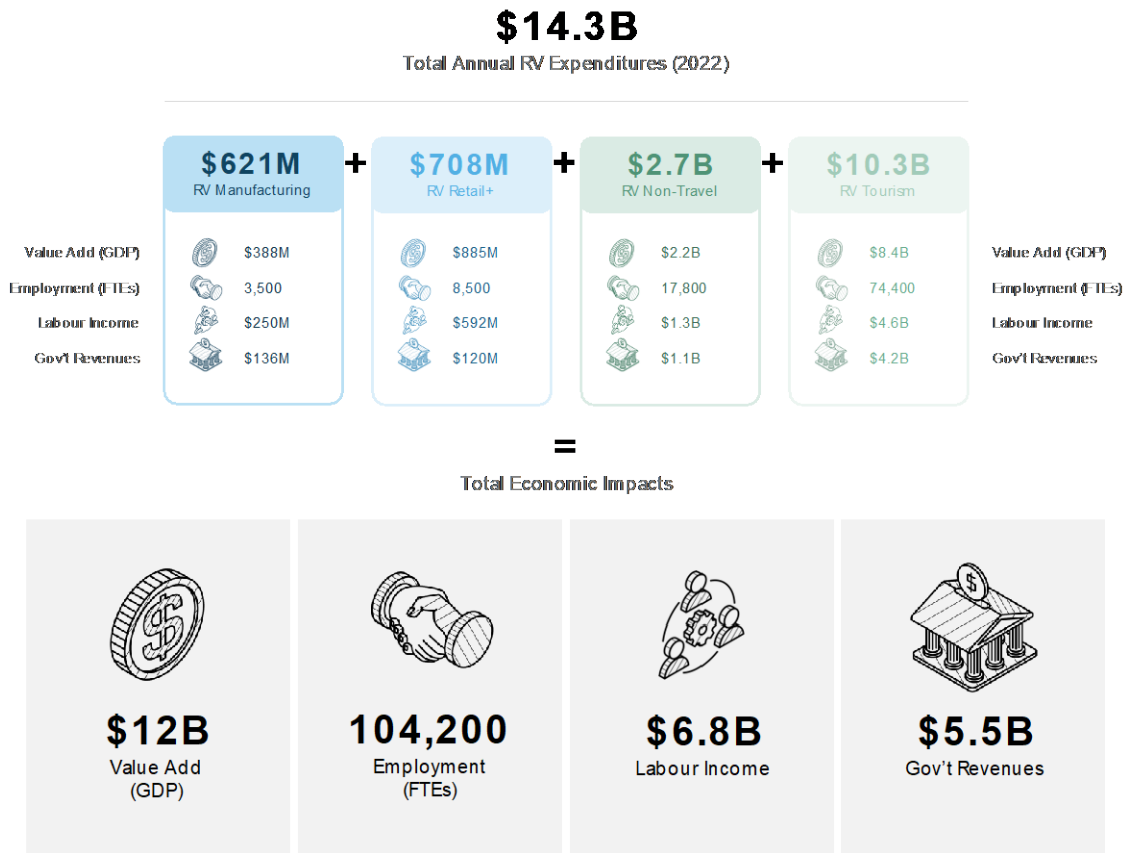
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EXECUTIVE SUMMARY

For many Canadians, recreation vehicles (RVs) are a convenient way to travel and enjoy the outdoors while providing some of the comforts of home. For others, it is more than a way to travel; it is a way of life. Given this, it is no surprise that recreation vehicles have a significant impact on the Canadian economy. The purpose of the 2023 Economic Impact of the Canadian Recreation Vehicle Industry is to estimate the level of economic activity supported by the RV industry in Canada.

The economic activity generated by the RV industry is considerable and multi-faceted including everything from the manufacturing, sales and service of RVs to expenditures to use, store, maintain and travel in RVs. In total, the RV sector generated an estimated 104,200 jobs and delivered \$12.0 billion in added value to the Canadian economy from an initial expenditure of \$14.3 billion in 2022.



While manufacturers and dealers contribute significantly to the total, a majority of the contribution occurs after the initial RV purchase. More specifically, expenditures associated with RV ownership and use account for 89% of the total value added to the Canadian economy. The study revealed that approximately 2.1 million (or 14% of) Canadian households own an RV. This is up approximately 3% since 2019. Post-purchase spending by this group of owners contributes to the economy through two expenditure categories:

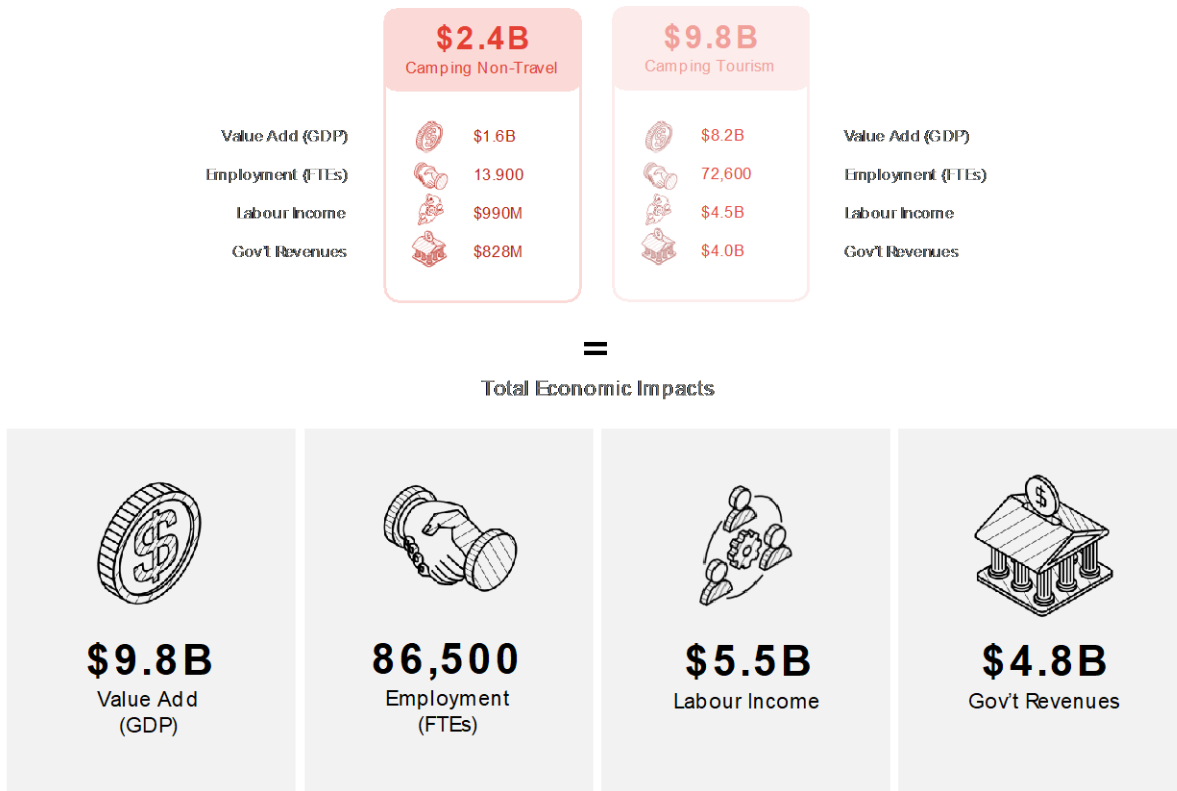
- **Non-travel RV expenditures** are those costs associated with RV ownership and include insurance, storage, and accessories. RV owners spent an estimated \$2.7 billion in these three categories in Canada in 2022. RV owners also spend on maintenance, however the value of this is included in the retail sales and service subsector expenditures.
- **RV tourism related expenditures** are costs associated with using the RV. The study reveals that the 2.1 million RV owners took an estimated 6.3 million RV trips in Canada in 2022. Further to this, Canadians who rented RVs took an estimated 1.3 million trips in Canada bringing the total to 7.7 million RV trips. When accounting for the length of trips and travel party size, these trips resulted in a total of 72.2 million person trip nights. With an estimated \$10.3 billion in spending from these trips, RV tourism is the largest contributor to the overall impact by a significant margin.

The results of this study continue to demonstrate that the RV industry is a significant contributor to the Canadian economy. Note, due to inconsistencies in Statistics Canada tourism data, changes were made to how expenditure data was collected and calculated for the current study. While all signs point to considerable growth, the tourism impacts are not directly comparable to the previous study.

In addition to the RV industry, the 2023 study also analyzed the economic impact of the camping sector. Like the RV industry, the camping sector is a significant contributor to the Canadian economy. In total, the camping sector generated an estimated 83,600 jobs and delivered \$9.8 billion in added value to the Canadian economy from an initial expenditure of \$12.2 billion in 2022.

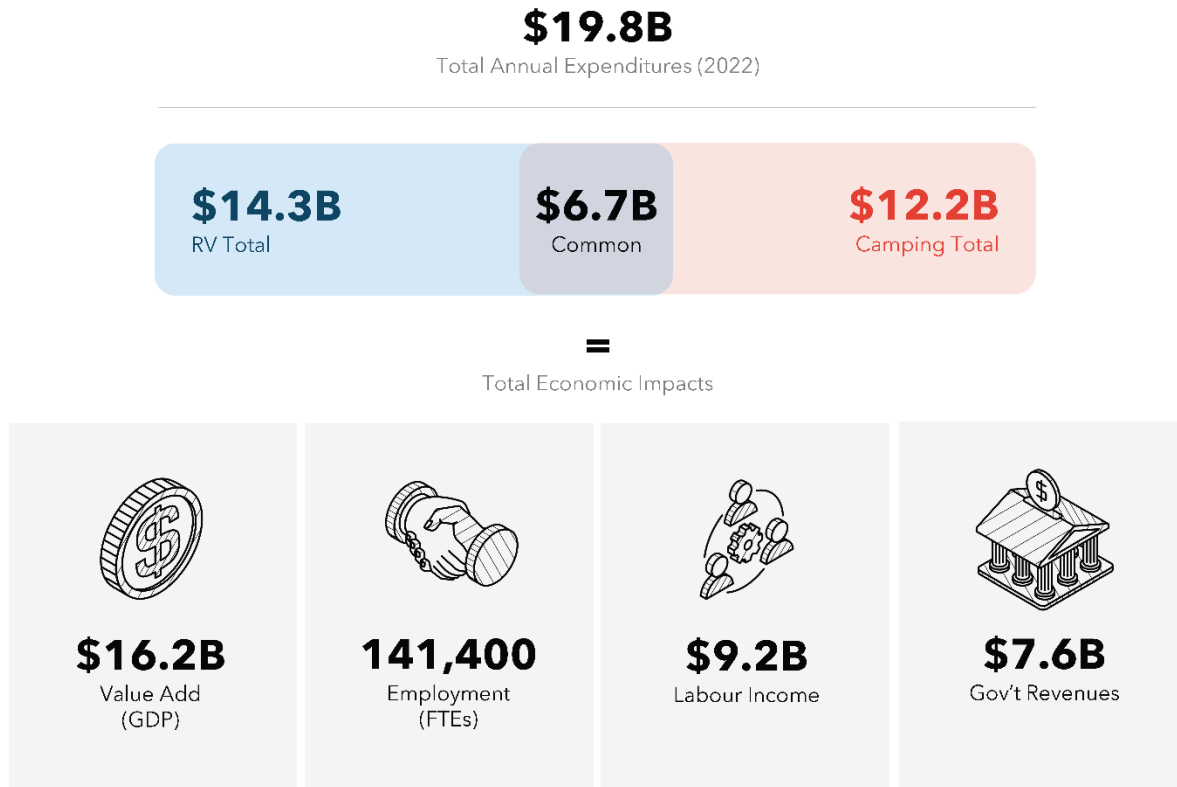
\$12.2B

Total Annual Camping Expenditures (2022)



Of the two major components measured, camping trips (tourism) is by far the biggest accounting for 84% of the total value added to the Canadian economy. The study results indicate that 4.4 million Canadian households took at least one overnight camping trip in 2022. Moreover, Canadians spent a total of 93.3 million person trips nights on camping trips in 2022. Further, these trips resulted in an estimated \$9.8 billion in initial spending.

With RV owners reporting that over three-quarters (77%) of their RV trips are to a campground, RVing and camping are clearly very much linked together. Combining the RV industry and camping sector generated an estimated 141,400 jobs and delivered \$16.2 billion in added value to the Canadian economy from an initial expenditure of \$19.8 billion in 2022.



When combining the two related sectors for the combined impact, it is important to remove the overlapping impacts. As shown in the figure above, there is an overlap of \$6.7 billion in initial spending between the two sectors. Accordingly, this value, and the associated impacts, are removed from the combined values so that it is not double counted.

The results of this study continue demonstrate that the combined RV industry and camping sector is a very significant contributor to the Canadian economy.

I. INTRODUCTION

For many Canadians, recreation vehicles (RVs) are a convenient way to travel and enjoy the outdoors while providing some of the comforts of home. For others, it is more than a way to travel; it is a way of life. Given this, it is no surprise that recreation vehicles have a significant impact on the Canadian economy. The economic activity generated by the RV industry is considerable and multi-faceted, including everything from the manufacturing, sales and service of RVs to expenditures to use, store, maintain and travel in RVs.

Recognizing an industry need to understand the economic impact of the sector, the Recreation Vehicle Dealers Association of Canada (RVDA) and the Canadian Recreational Vehicle Association (CRVA) engaged The Portage Group Inc. and Parcel Economics Inc. to estimate the level of economic activity supported by the RV industry in Canada. This year's study also includes a deeper analysis of the impact of the camping sector. The economic impact analysis looks at the economic activity in six distinct subsectors, including:

- RV manufacturing (Chapter II);
- RV retail sales and service (Chapter III);
- Non-travel related RV expenditures (Chapter IV);
- Tourism-related RV expenditures (Chapter V);
- Non-travel related camping expenditures (Chapter VI); and,
- Tourism-related camping expenditures (Chapter VII).

Expenditure estimates were developed for each of the six subsectors and subsequently entered into Statistics Canada's provincial Input-Output Model to examine the level of jobs, taxes, and economic activity supported in by each subsector and in aggregate. This report details the study findings.

For this report, the term recreation vehicle, or RV, refers to a vehicle that can be lived in and can be driven or towed from place to place, although some are stationary park model homes. RV's include the following vehicle types: travel trailers; fifth wheel trailers; toy haulers; hybrid travel trailers; tent camping trailers; park model trailers; truck campers; class A motorhomes; class B motorhomes; and, class C motorhomes.

For this report, the term camping includes tent camping, car camping, RV camping, backcountry camping and ready-to-camp units (tent, yurt, RV, trailer, fully equipped, belonging to the campground).

This study is an update to the *Economic Impact of the Canadian Recreation Vehicle Industry Study* conducted in 2020 by The Portage Group. To the extent possible, efforts were made to replicate the methodology from 2020 to maintain comparability. However, some changes were necessary based on available data. These are discussed later in the report where applicable. As noted earlier, this year's study also includes a broader analysis of the camping sector.

II. RV MANUFACTURING

The first subsector in this economic impact analysis is RV manufacturing. These are businesses that are primarily engaged in the manufacturing of RVs, such as motorhomes, fifth wheels, travel trailers, park models and campers, and RV parts – the primary commodity for the sector. This section looks at the revenues and economic impact generated by these businesses.

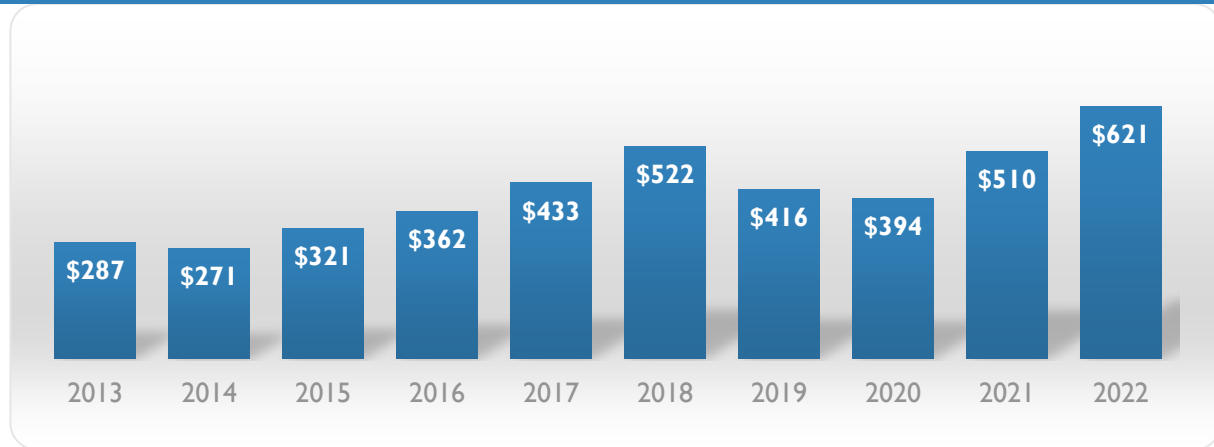
RV MANUFACTURING EXPENDITURE ESTIMATES

MANUFACTURING SALES GROWTH

According to the Statistics Canada Monthly Survey of Manufacturing, RV manufacturers in Canada (NAICS 336215) generated an estimated total of \$621 million in the sale of goods manufactured (shipments) in 2022. This represents a significant increase of 22% over 2021 and is the second consecutive year the subsector experienced considerable growth (see [Exhibit 2-1](#)).

After climbing 93% from 2014 to 2018, manufacturing sales experienced a significant 20% drop in 2019 followed by a further 5% decrease in 2020, the year the global economy was severely impacted by the COVID-19 pandemic. Since 2020, manufacturing sales have risen rapidly and in 2022 were 19% higher than the previous peak in 2018.

Exhibit 2-1: RV Sales of Goods Manufactured (shipments) 2013 to 2022 (\$ millions)



Sales of Goods Manufactured (shipments) Year Over Year Growth

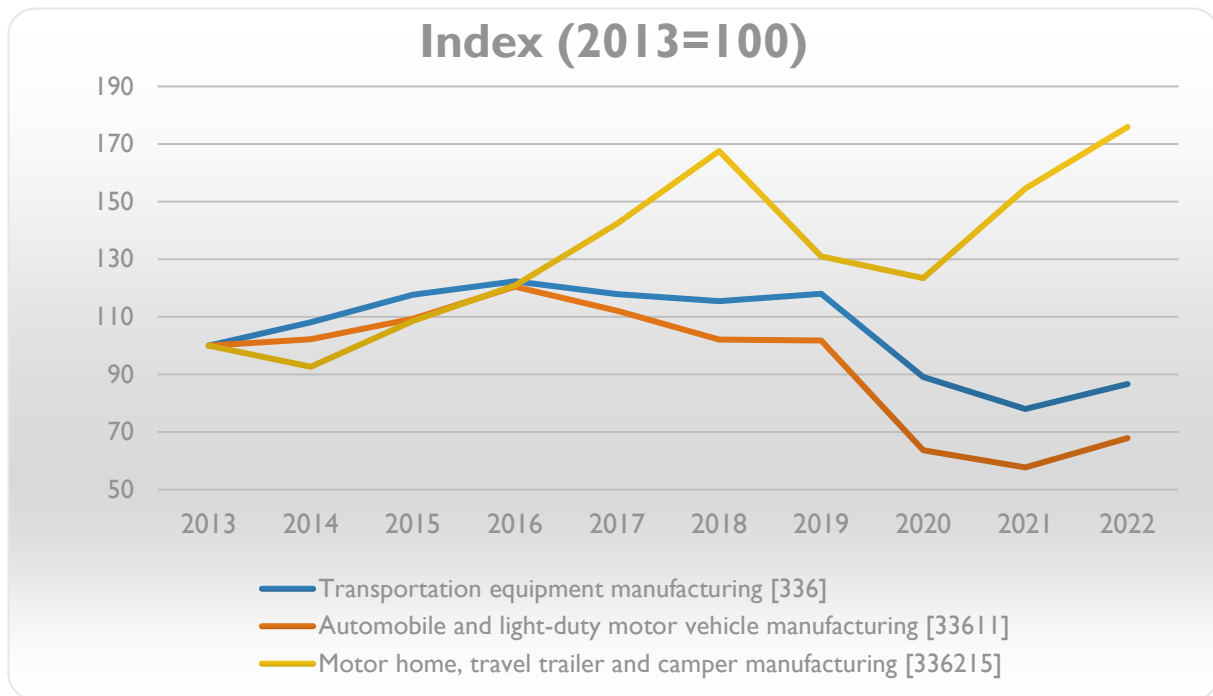
	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Annual Change	-4.2%	-5.5%	18.5%	12.9%	19.5%	20.5%	-20.3%	-5.1%	29.4%	21.6%

Source: Statistics Canada Monthly Survey of Manufacturing (16-10-0047-01) - NAICS 336215.

Note: Statistics Canada estimates are subject to revision.

As illustrated in **Exhibit 2-2**, the RV manufacturing sector has followed a different path than the rest of the transportation equipment manufacturing sector and automobile and light-duty motor vehicle manufacturing sector. All three trend lines followed a generally similar path from 2013 to 2016. From 2016 to 2018, RV manufacturing saw a significant upward trend while other transportation manufacturing slowed. RV manufacturing notably declined in 2019 to close the gap. While all three trendlines decreased in 2020, the drop was not as steep for RV manufacturing as the rest of transportation manufacturing. What stands out most is the sharp increase in RV manufacturing from 2020 to 2022 while the rest of the transportation manufacturing sector decreased in 2021 and showed only modest growth in 2022.

Exhibit 2-2: Inflation-Adjusted RV Sales of Goods Manufactured (shipments) 2013 to 2022

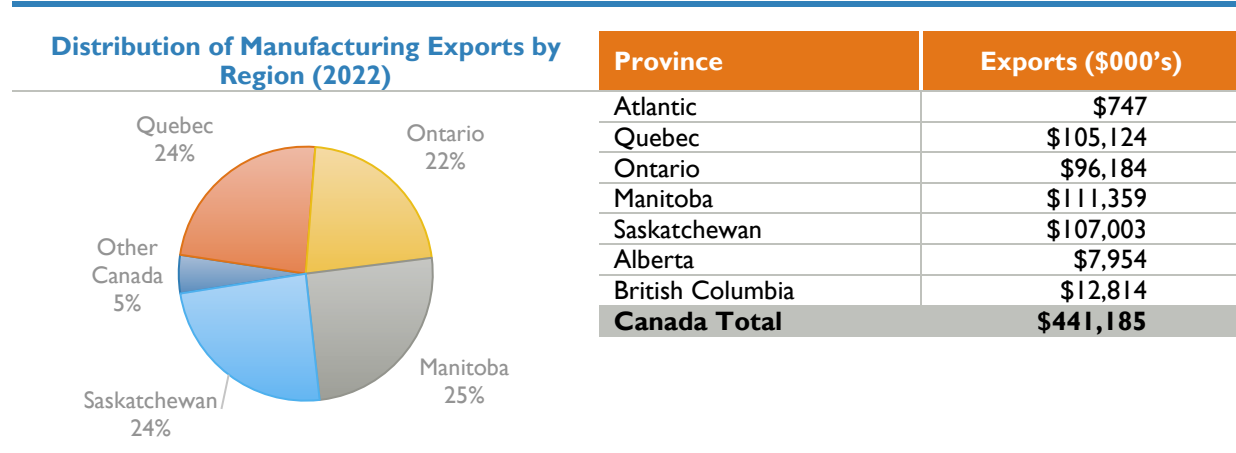


Source: Statistics Canada Monthly Survey of Manufacturing (16-10-0047-01).

RV MANUFACTURING EXPORTS AND IMPORTS

Approximately 71% of the \$621 million worth of RVs manufactured in Canada were exported. As seen in **Exhibit 2-3**, total manufacturing exports amounted to \$441 million. Manitoba (25% of exports), Saskatchewan (24%), Quebec (24%) and Ontario (22%) are the biggest exporting regions accounting for 95% of all exports combined.

Exhibit 2-3: RV Manufacturing Exports by Province in 2022

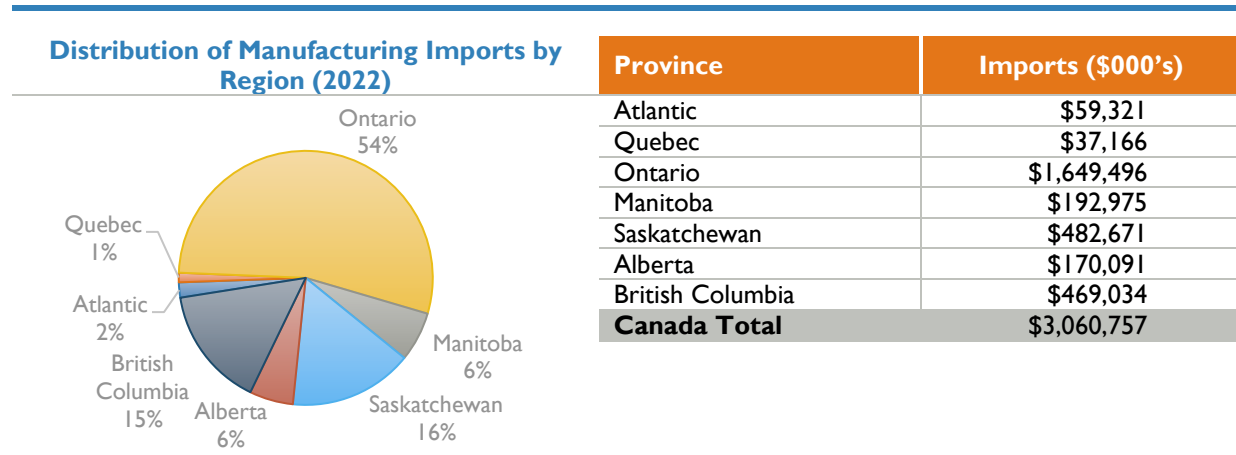


Source: Industry Canada, Trade Data Online, NAICS 336215.

Note: Total may not sum due to rounding.

RV manufacturing imports totalled just over \$3 billion in 2022 (see **Exhibit 2-4**). At \$1.6 billion, Ontario accounted for over half (54%) of all imports. Saskatchewan ranks second in imports at \$483 million or 16% followed by British Columbia (15%). Other regions account for 6% of manufacturing imports or less.

Exhibit 2-4: RV Manufacturing Imports by Province in 2022



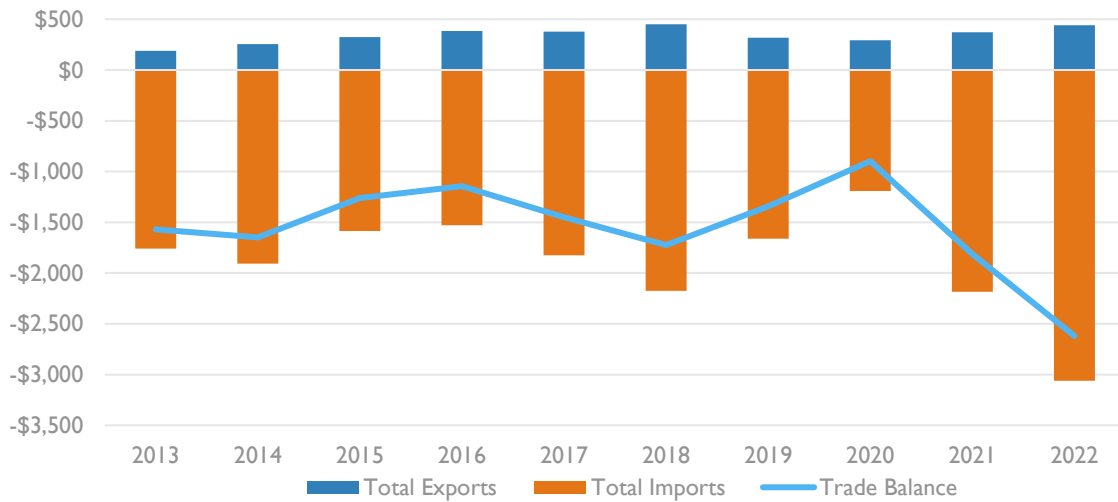
Source: Industry Canada, Trade Data Online, NAICS 336215.

Note: Total may not sum due to rounding.

The difference between exports and imports represents Canada’s trade balance. In 2022, Canada had a trade deficit of \$2.6 billion in the manufacturing sector for RVs (NAICS 336215). As illustrated in **Exhibit 2-5**, Canada has been in a trade deficit position for RV manufacturing every year from 2013 to 2022. In fact, while not shown in the graph, the data on Industry Canada’s Trade Data Online shows that the RV sector has been in a trade deficit position all the way back to 2002, the first year of available data.

Canada’s trade deficit in RV manufacturing has seen a sharp rise in the last two years, growing by 192%. Like manufacturing sales, this follows a significant decrease in the deficit from 2018 to 2020. However, the trade deficit is up 52% in 2022 compared to the previous peak in 2018.

Exhibit 2-5: RV Manufacturing Exports, Imports and Trade Balance (\$ million) 2013 to 2022



Source: Industry Canada, Trade Data Online, NAICS 336215.

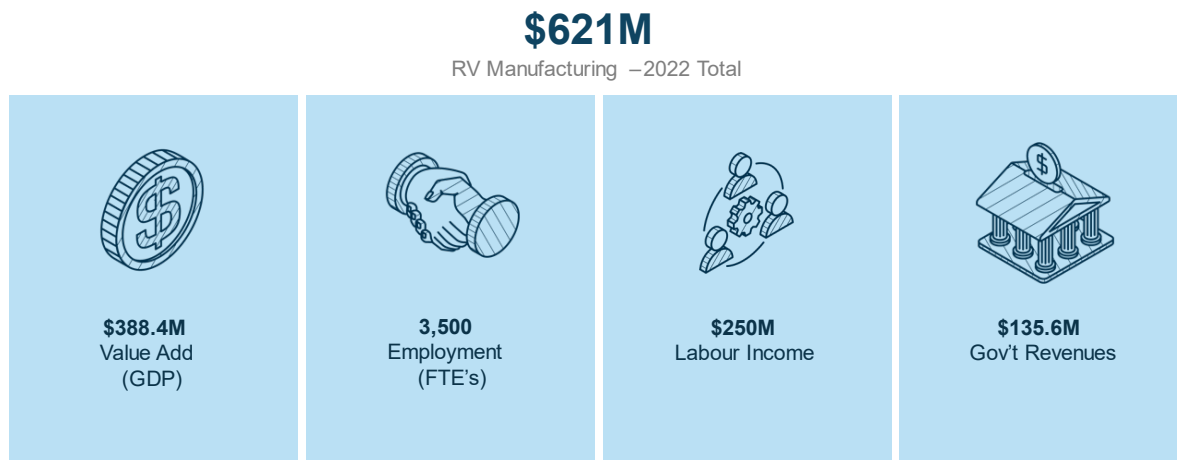
ECONOMIC IMPACT – RV MANUFACTURING

As described above, the total value of recreation vehicles manufactured in Canada was approximately \$621 million in 2022. Of this total production value, some \$441 million—or 71%—was exported to markets outside of Canada, with the balance representing domestic consumption of locally-made RV products.

As detailed below, the value of recreation vehicles manufactured in Canada in 2022—including direct, indirect and induced impacts—generates significant value for the Canadian economy.

- **± \$388.4 million in value added** to the Canadian economy;
- **± 3,500 full-time years of employment**;
- **± \$250.3 million in labour income** across Canada; and,
- **± \$135.6 million in tax revenue** to municipal, provincial and national governments, in the form of personal tax, corporate tax, and other taxes.

Appendix 2 provides the detailed results of our economic impact analysis relating to the value of RV production in Canada, including a breakdown by Region.



Relative to the results of the 2018 economic impact study undertaken on behalf of the RVDA, these manufacturing impacts represent a significant growth across all variables considered. In particular, we note that this is largely attributable to the increase in initial spending, which grew by over 43% (i.e., the value of manufacturing reached \$621 million in 2022, up from an estimated \$433 million in 2017 (revised)). Accordingly, the various economic benefits derived from this initial shock expenditure have increased as well, with significant growth in the value added to the economy, number of jobs, labour income and tax-related benefits generated as a result of RV production activities.

III. RV RETAIL SALES AND SERVICE

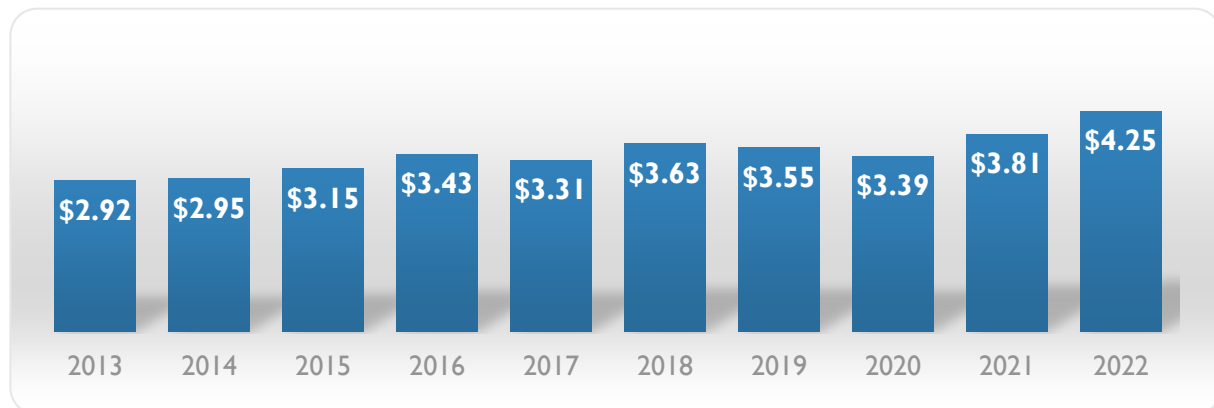
The RV retail sales and service subsector is comprised of businesses primarily engaged in retailing new and used RVs, such as motorhomes, fifth wheels, travel trailers, park models and campers. These establishments also typically provide maintenance and repair services as well as selling parts and accessories. This section looks at the revenues and economic impact generated by these businesses.

RV RETAIL SALES AND SERVICE EXPENDITURE ESTIMATES

RETAIL SALES GROWTH

According to the Statistics Canada Monthly Retail Trade Survey, RV retail sales and service businesses (NAICS 44121) generated an estimated total of \$4.3 billion in sales in 2022 which represents a significant 11.6% increase in revenues from 2021. As illustrated in **Exhibit 3-1**, while there have been some peaks and valleys along the way, RV sales have generally been on the rise over the past ten years. The exceptions were in 2017, 2019 and 2020. Since 2020, the COVID 19 pandemic year, sales have grown by a cumulative 26%.

Exhibit 3-1: RV Retail Sales 2013 to 2022 (\$ billions)



Retail RV Sales Year Over Year Growth

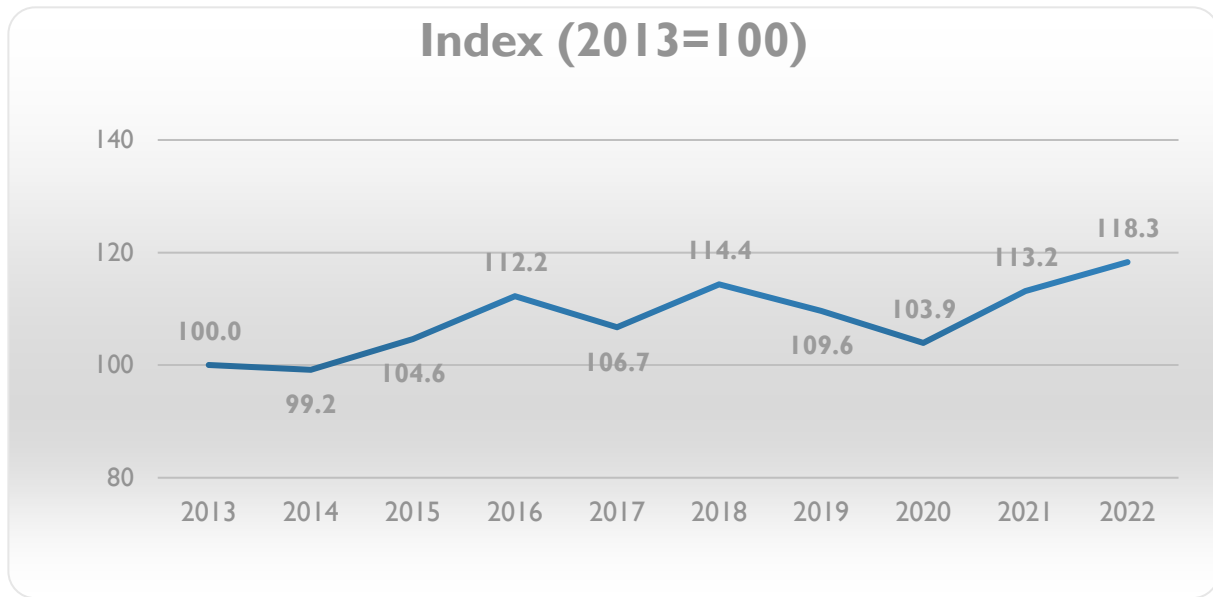
	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Annual Change	-0.4%	1.1%	6.7%	8.8%	-3.4%	9.6%	-2.3%	-4.5%	12.5%	11.6%

Source: Statistics Canada Monthly Retail Trade Survey - NAICS 44121.

Note: Statistics Canada estimates are subject to revision.

While the nominal RV retail sales figures have grown by a cumulative 46% from 2013 to 2022, inflation-adjusted sales indicate a more modest rate of growth (see **Exhibit 3-2**). Using 2013 as the base year, the indexed sales show cumulative ten-year growth at 18.3%. As illustrated, after adjusting for inflation, the sector saw a significant increase of 13% in sales from 2014 to 2016. Since 2016, sales have had an uneven path and increased by 5% cumulatively.

Exhibit 3-2: Inflation-Adjusted RV Retail Sales Growth 2013 to 2022



Inflation-Adjusted Retail RV Sales Year Over Year Growth										
	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Annual Change	N/A	-0.8%	5.5%	7.3%	-4.9%	7.2%	-4.1%	-5.2%	10.9%	2.6%

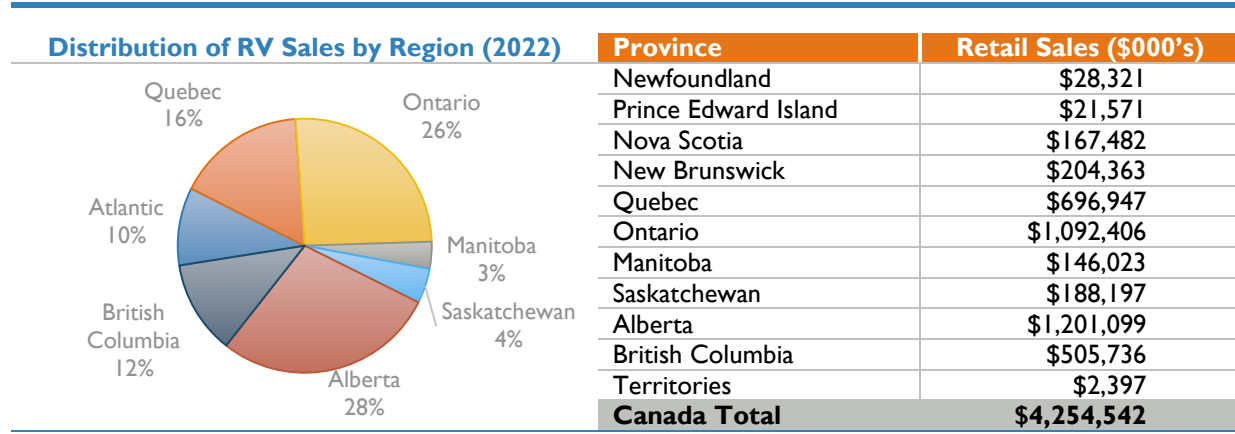
Source: Based on Statistics Canada Monthly Retail Trade Survey - NAICS 44121 and Consumer Price Index base year 2002.

Note: Statistics Canada estimates are subject to revision.

REGIONAL DISTRIBUTION OF RV RETAIL SALES

Given the various gaps in the regional data from Statistics Canada, the regional breakdowns were estimated based on the regional sales data that was available from Statistics Canada in combination with RVDA monthly unit sales data produced by Statistical Surveys Inc. As shown in **Exhibit 3-3**, 82% of RV retail sales revenue in Canada was generated from the ‘big four’ provinces. Alberta leads the way at 28%, followed closely by Ontario (26%). Quebec is a distant third at 16% followed by British Columbia at 12%.

Exhibit 3-3: RV Retail Sales by Province in 2022



Source: TPG based on Statistics Canada & Statistical Surveys Inc. data.

Notes: Regional sales are estimated based on available monthly sales data from Statistics Canada and unit sales data from Statistical Surveys Inc.

Statistics Canada data is subject to revision.

Total may not sum due to rounding.

ECONOMIC IMPACT – RV RETAIL SALES AND SERVICE

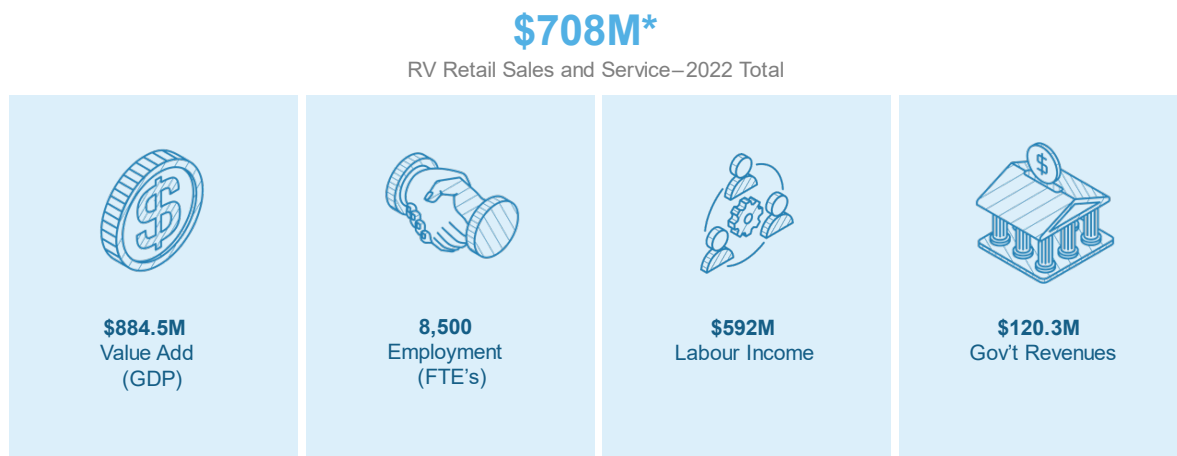
As shown earlier, the total value of recreation vehicles sold and serviced in Canada in 2022 was approximately \$4.3 billion, up from \$3.3 billion in 2017 (revised). In calculating the economic impact of RV retail activities, however, it is important to note that only the gross retail and wholesale markup components represent the unique contributions of retail sales and service activities. The balance of these sales (including the cost of goods sold) has already been quantified separately as part of the corresponding manufacturing analysis (See Section II).

Based on this approach, the gross markup component of the total sales estimate above—some \$708 million—has been considered as a direct input to our economic impact analysis. This is consistent with the 2018 study methodology.

As detailed below, the value of recreation vehicles sold in Canada in 2022 generated:

- **± \$884.5 million in value added** to the Canadian economy;
- **± 8,500 full-time years of employment**;
- **± \$592.0 million in labour income** across Canada; and,
- **± \$120.3 million in tax revenue** to municipal, provincial and national governments, in the form of personal tax, corporate tax, and other taxes.

Appendix 2 provides the detailed results of the economic impact analysis relating to the value of RV retail and service activities across Canada, including a breakdown by region.



*Represents gross markup only.

The 25% growth in sales and service mark-up between 2017 and 2022 can be attributed, in part, to the increase in initial spending for RV Manufacturing.

IV. NON-TRAVEL RELATED RV EXPENDITURES

In addition to economic impact generated from the manufacture and sale of RVs, there are considerable impacts generated from the use and ownership of RVs. This chapter looks at non-travel related expenditures and economic impact. These are the expenditures associated with ownership that are not dependent on use and include insurance, storage, maintenance, and other purchases.

NON-TRAVEL RELATED RV EXPENDITURE ESTIMATES

APPROACH

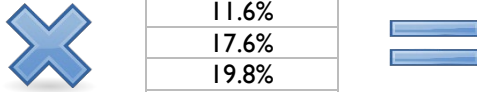
As there is no existing data source for non-travel spending by RV owners, a survey was undertaken to determine the level of non-travel spending and the incidence of RV ownership. More specifically, the survey was conducted with three audiences as follows:

- **Online Panel Survey – General Population:** TPG conducted an online web-based panel survey in May 2023 with 2,502 adults/households across Canada. A series of questions were also included to determine the incidence of RV related attributes/activity such as RV ownership, RV rental and RV-related travel.
- **RV Owner Booster Sample:** To ensure a sufficient sample of RV owners, a survey was also conducted with a target panel sample that was pre-screened to be more likely to own an RV. When combined with the sample from the general population survey, a total of 1,046 RV owners were captured in the survey.
- **Camper Booster Sample:** To ensure a sufficient sample of campers, a survey was also conducted with a target panel sample that was pre-screened to be more likely to have camped in the last five years. When combined with the sample from the general population survey and RV campers from the RV owner booster sample, a total of 1,966 campers were captured in the survey.

RV OWNERSHIP

The online panel survey included questions about the ownership of recreation vehicles. These questions were used to estimate the incidence of RV owners in Canada. As seen in **Exhibit 4-1**, the results revealed that approximately **14% of Canadian households own or have access to a recreation vehicle**. This is consistent with past studies. Moreover, three of the four studies conducted going back to 2012 have shown RV ownership ranging from 13.9% to 14.2%. The exception was in 2017 when the incidence was measured at 15.2%, which is within the margin of error.

Exhibit 4-1: Household RV Ownership in 2022

	Households ¹		Share Owning RVs ²		Owners (household)
Atlantic	1,053,702		15.4%	=	162,651
Quebec	3,749,035		12.7%		475,538
Ontario	5,491,201		11.6%		639,482
Prairies	967,635		17.6%		170,295
Alberta	1,633,220		19.8%		323,637
British Columbia	2,041,834		16.1%		329,393
Canada	14,978,941		14.1%		2,106,948

Sources: ¹Statistics Canada Census 2021.

²TPG online general population survey, May 2023.

Note: Totals may not sum due to rounding and the inclusion of the Territories at the national level.

By multiplying the total number of households in Canada (15 million) by the incidence of ownership, it is estimated that just over **2.1 million Canadian households own an RV**.

The 2019 estimate of the number of RV owning households was based on an estimate of the number of Canadian households calculated based on available data. Since then, Statistics Canada conducted the 2021 census which included a revised count of the number of households in Canada (presented above). The new census data, and additional Statistics Canada data indicate that the number of households estimated in the 2020 study was approximately 3% higher than the actual number of households at the time. Using the revised estimate of the number of households for 2019, the revised estimate of the number of RV owning households is 2,045,700 or approximately 60,000 fewer RV owning households than previously reported.

Based on the revised 2019 RV owner estimate, the 2.1 million owners in 2022 represents an increase of approximately 3% in the number of RV owners. Given the incidence rate is almost the same, the increase is primarily the result of population growth.

Regionally, RV ownership is highest in Alberta (20%) and the prairies (18%). At the other end of the spectrum, ownership is lowest in Ontario (12%) and Quebec (13%).

As illustrated in **Exhibit 4-2**, Ontario accounts for the largest share of RV ownership at 30%, which is lower than the 37% of households located in Ontario. Conversely, Alberta (15% of owners vs. 11% of households) is over-represented compared to their share of households. For other provinces and regions, the share of RV owners is within two percentage points of the share of households. In other words, the regional distribution of RV ownership across Canada is largely similar to the distribution of Canadian households.

Exhibit 4-2: Distribution of RV Owners in 2022



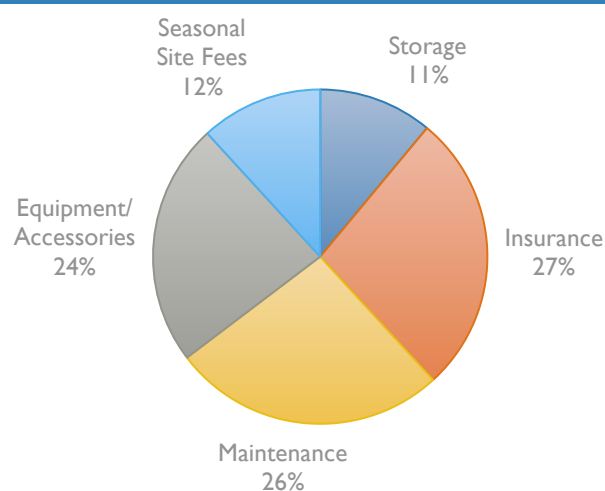
Sources: Statistics Canada Census 2021, TPG online general population survey, May 2023 and TPG calculation.

NON-TRAVEL SPENDING

The survey of RV owners asked respondents to indicate how much they spent in 2022 in five areas not related to travel. Seasonal site fees are a new addition for the 2023 study and have been included in the non-travel spending as seasonal fees are not dependent on the number of times owners visit their seasonal site.

As shown in **Exhibit 4-3**, the largest non-travel related expenditures associated with RV ownership are insurance (27%) and maintenance (26%) which each account for just over one-quarter of spending. At 24%, equipment and accessories are not far behind. The smallest expenditures are seasonal site fees at 12% and storage at 11%.

Exhibit 4-3 – Allocation of Non-Travel Related RV Spending



Source: TPG online survey of RV owners (aged 25+), May 2023

With respect to seasonal site fees, it is important to note that while the average value across all RV owners is one of the smallest expenses, this is because the average value includes zero values for the almost nine in ten RV owners who do not rent a seasonal site. When looking at only those that do rent a seasonal site, the average value of seasonal site fees makes it one of the highest expenses.

As shown in **Exhibit 4-4**, RV owners spent an average of \$1,722 in non-travel expenditures in 2022. It should be noted that with the exception of seasonal site fees, the average amount spent by category includes all RV owners, including those with a \$0 expenditure. The cost of seasonal sites was only asked to those who reported they rented a seasonal site whereas other expense questions were asked of all RV owners.

Exhibit 4-4: Non-Travel RV Expenditure per Household in 2022

	Storage	Insurance	Maintenance	Equipment & Accessories	Total Excl. Seasonal	Seasonal Site Fees	Total Incl. Seasonal
Atlantic	\$126	\$447	\$369	\$259	\$1,202	\$1,713	\$1,507
Quebec	\$123	\$444	\$541	\$408	\$1,517	\$1,435	\$1,741
Ontario	\$261	\$481	\$477	\$516	\$1,735	\$2,259	\$2,058
Prairies	\$138	\$403	\$304	\$329	\$1,173	\$1,696	\$1,339
Alberta	\$205	\$455	\$491	\$320	\$1,472	\$1,179	\$1,563
British Columbia	\$181	\$530	\$408	\$403	\$1,522	\$1,073	\$1,576
Canada	\$190	\$468	\$456	\$405	\$1,519	\$1,735	\$1,722

Source: TPG online survey of RV owners (aged 25+), May 2023.

Note: Totals may not sum due to rounding.

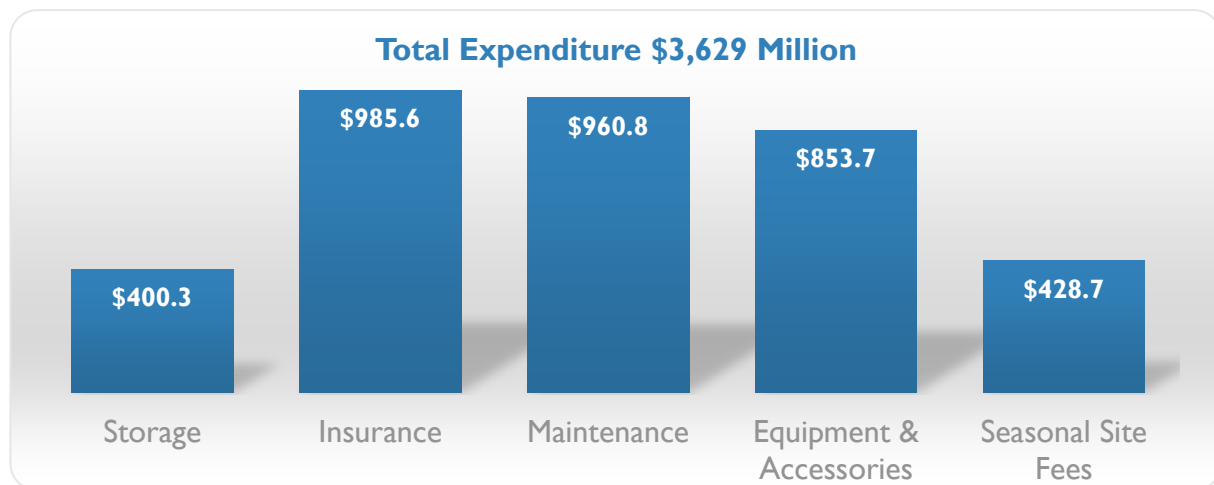
Previous studies did not specifically ask about seasonal site fees. Accordingly, the total excluding seasonal should be used when comparing to prior years. The \$1,519 in expenses excluding seasonal represents a significant 19% increase over the \$1,279 reported for 2019. In the same time period, the consumer price index rose by 12.2%.¹

To generate the aggregate expenditures, the average expenditures are multiplied by the number of RV owners. As seen in **Exhibit 4-5**, the estimated total aggregate non-travel spending is \$3.6 billion for 2022. Of this, \$986 million was spent on insurance, \$961 million on maintenance, \$854 million on equipment and accessories, \$429 on seasonal site fees and \$400 million on storage.

For comparison purposes, total non-travel spending excluding seasonal site fees was \$3.2 billion in 2022 which represents an increase of 19% over the \$2.7 billion from 2019.

At \$1.3 billion, the highest expenditures are in Ontario followed closely by Quebec at \$817 million.

Exhibit 4-5: Aggregate Non-Travel RV Expenditure (\$ millions) in 2022



	Storage	Insurance	Maintenance	Equipment & Accessories	Seasonal Site Fees	Total
Atlantic	\$20.8	\$72.8	\$59.5	\$41.8	\$49.8	\$243.9
Quebec	\$59.2	\$211.2	\$254.9	\$192.5	\$98.9	\$816.7
Ontario	\$168.3	\$307.8	\$302.1	\$327.1	\$207.7	\$1,313.0
Prairies	\$23.6	\$68.7	\$51.2	\$55.5	\$25.9	\$225.0
Alberta	\$67.1	\$147.5	\$157.2	\$102.8	\$28.2	\$502.9
British Columbia	\$60.1	\$174.9	\$133.1	\$131.4	\$17.7	\$517.3

Source: TPG calculation.

Note: Totals may not sum due to rounding.

¹ Source: Bank of Canada - <https://www.bankofcanada.ca/rates/price-indexes/cpi/>

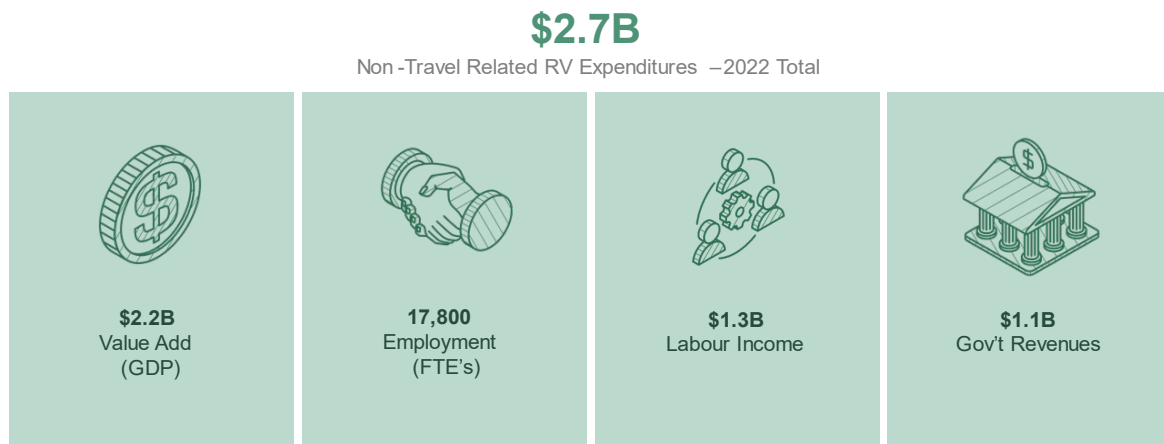
ECONOMIC IMPACT – NON-TRAVEL RELATED RV EXPENDITURES

Similar to the previous economic impact study undertaken on behalf of the RVDA in 2018, the maintenance component of non-travel related recreation vehicle expenditures was deliberately excluded from this portion of our analysis. In particular, we note that it has been assumed that the majority of this spending would be incurred at recreation vehicle dealerships and therefore included as part of our evaluation as to the economic impacts of RV retail and service activities (i.e., as presented in Section III). If not for this type of discounting for maintenance related expenditures, there is a risk of double-counting and thereby potentially over-stating the true impacts of this aspect of the RV industry in Canada.

Overall, total non-travel related recreation vehicle expenditures for 2022 are estimated at some \$2.7 billion, after accounting for the maintenance component as described above. This substantial spending on items such as storage, insurance, as well as other equipment and accessories yields a significant economic impact across Canada.

- **± \$2.2 billion in value added** to the Canadian economy;
- **± 17,800 full-time years of employment.**
- **± \$1.3 billion in labour income** across Canada; and,
- **± \$1.1 billion in tax revenue** to municipal, provincial and national governments, in the form of personal tax, corporate tax, and other taxes.

Appendix 2 provides the detailed results of the economic impact analysis related to spending on non-travel items throughout the country, including a breakdown by region.



Similar to the relationship shown in our analysis of RV manufacturing activities, the economic impacts of non-travel related expenditures have experienced a healthy amount of growth in recent years, particularly since the previous study was completed in 2018. Specifically, we note the total value of these expenditures has increased by some 30% between 2017 and 2022 (not including seasonal site fees which are new in this year's study), representing an average annual rate of growth of just over 5%. Similarly, the economic impacts derived from this increased spending have increased significantly as well.

V. TOURISM RELATED RV EXPENDITURES

The final RV subsector included in the economic impact analysis is the RV tourism market. This includes all expenditures incurred from travel in or using an RV. These include expenditures such as campground fees, other accommodations, vehicle operation (including gas and repairs), food and beverage, and activities.

TOURISM RELATED RV EXPENDITURE ESTIMATES

APPROACH



Unlike past studies that relied on spending data from Statistics Canada's National Travel Survey (formerly the Travel Survey of Canadian Residents), the **Online Panel Survey of RV Owners** outlined in *Chapter IV* was used for all travel-related estimates including frequency of travel, trip characteristics and spending.

As discussed later, the change was made due to an inconsistency in the average spending from the National Travel Survey produced by Statistics Canada.

RV TRIPS

As seen in **Exhibit 5-1**, results from the online panel survey indicate that RV owners (households) took an average of 3.0 RV trips in Canada in 2022. Additional trips taken to the US are excluded from this analysis. Multiplying the average number of trips by the number of RV owning households yields a total of 6.3 million RV trips taken by RV owners in Canada in 2022. While this represents a significant decrease from the 7.7 million trips reported for 2019, the number of RV trip nights was approximately 20 million in both years. In other words, while there were fewer trips taken in 2022, the average length of trips was greater than in 2019.

Exhibit 5-1: RV Trips in Canada by RV Owners in 2022

	RV Owners (households) ¹		Avg. RV Trips in Canada (2022) ²		Total RV Trips in Canada by Owners
Atlantic	162,651		3.7		607,700
Quebec	475,538		2.6		1,240,221
Ontario	639,482		3.2		2,021,032
Prairies	170,295		3.1		532,180
Alberta	323,637		3.4		1,088,881
British Columbia	329,393		2.5		828,569
Canada	2,106,948		3.0		6,318,584

Sources: ¹TPG calculation per Exhibit 4-1.

²TPG online survey of 1,046 RV owners, May 2023.

Note: Totals do not sum due to rounding and the inclusion of the Territories at the national level.

In addition to trips taken by RV owners, many Canadians also rent RVs through both commercial suppliers and private owners. Based on results from the online panel survey, 4.4% of adult Canadians took at least one trip in a rented RV in 2022 (see **Exhibit 5-2**). Expanding this based on the number of Canadian households from the 2021 Canadian census and the average number of RV trips taken by renters (2.0) yields just under 1.4 million RV rental market trips in 2022.

Exhibit 5-2: RV Rental Trips in Canada in 2022

	Total Canada Households ¹	14,978,941
X	Incidence of Taking Rental RV Trip in Canada ²	4.4%
=	Total Households Taking an RV Rental Trip	663,891
X	Average RV Trips Per Rental Household ²	2.0
=	Total Canadian Rental Trips	1,357,772

Sources: ¹ Statistics Canada Census 2021.



²TPG online general population survey, May 2023.

Note: Totals do not sum due to rounding.

Combining trips from both RV owners and rentals yields a **total of 7.7 million RV trips in Canada in 2022**. Combined, these trips generated an estimated 72.2 million person trip nights.

Of the 7.7 million total RV trips, approximately **77% or 5.9 million were to a campground in 2022**. This includes 4.9 million camping trips among RV owners and 1 million camping trips among RV renters. A breakdown of the number of camping trips by province for RV owners is presented in **Exhibit 5-3**.

Exhibit 5-3: RV Camping Trips in Canada by RV Owners in 2022

	RV Owners (households) ¹		Avg. RV Camping Trips in Canada (2022) ²		Total RV Camping Trips in Canada by Owners
Atlantic	162,651		2.7		437,024
Quebec	475,538		2.3		1,087,075
Ontario	639,482		2.4		1,504,615
Prairies	170,295		2.5		428,352
Alberta	323,637		2.6		838,263
British Columbia	329,393		1.9		615,940
Canada	2,106,948		2.3		4,925,183

Sources: ¹TPG calculation per Exhibit 4-1.

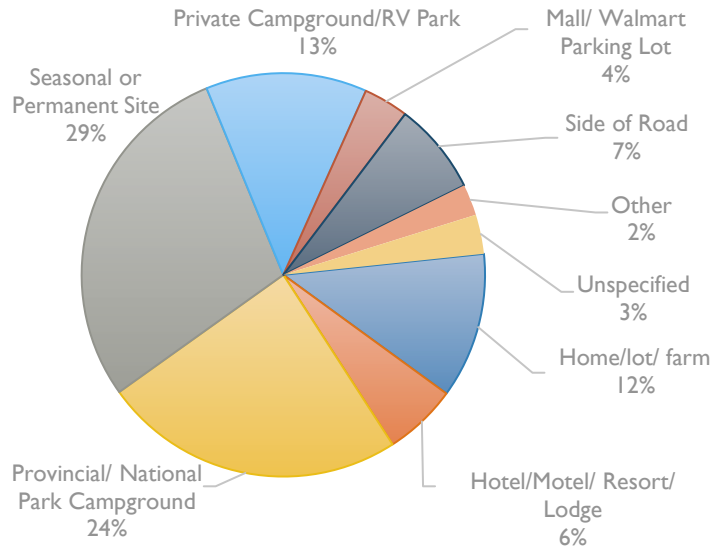
²TPG online survey of 1,046 RV owners, May 2023.

Note: Totals do not sum due to rounding and the inclusion of the Territories at the national level.

TRIP NIGHTS BY LOCATION

Given 77% of RV trips are camping trips, it is not surprising, that a significant majority of RV trip nights are spent in campgrounds or RV parks. As illustrated in **Exhibit 5-4**, two-thirds (66%) of RV trip nights in 2022 were spent in a campground. Seasonal sites are most common accounting for 29% of RV trip nights followed by provincial/national parks (24%) and private campgrounds/RV parks (13%).

Exhibit 5-4 – RV Trip Nights by Location

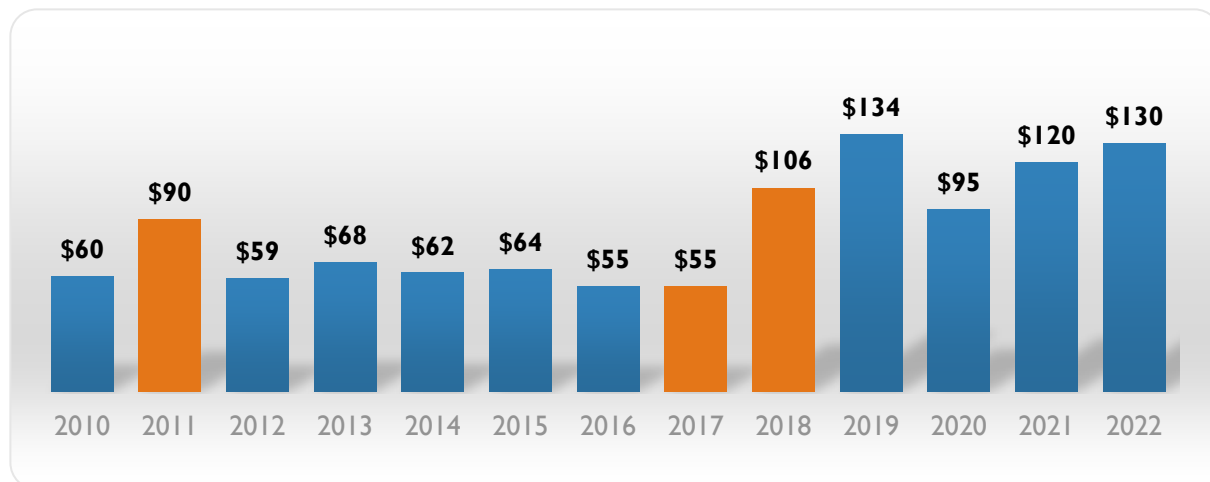


Source: TPG online survey of RV non-owners, May 2023

METHODOLOGY CHANGE

Past economic impact studies of RV travel have relied on Statistics Canada’s travel surveys for estimates of RV travel related spending. Specifically, estimates were obtained from the Travel Survey of Resident Canadians (TSRC) for studies prior to 2018 and from the National Travel Survey in 2019. As illustrated in **Exhibit 5-5**, average spending per person per night for RV trips from the Statistics Canada surveys was generally around \$55 to \$65 from 2010 to 2017 with one significant exception. In 2011, the first year a study was conducted, the average expenditure was \$90, which is 50% higher than the year before (2010) or after (2012). Similarly, in 2018, the average expenditure was \$106, which is almost double the year before (2017) and has been somewhat erratic since. Notably, in both 2011 and 2018, Statistics Canada made changes to the methodology of the National Travel Survey (formerly the Travel Survey of Resident Canadians). In both cases, the spikes in average spending do not correlate with average spending trends for overall domestic travel.

Exhibit 5-5: Average Expenditures per Person per Night on RV Trips Reported by Statistics Canada for 2010 to 2022



Source: Statistics Canada TSRC and NTS custom data tabulation, TPG calculations. The orange bars represent the years the previous studies were conducted. Note, while the last study measured the 2019 economic impact, 2019 spending data was not yet available from Statistics Canada when the study was conducted.

The last economic impact study was conducted provided estimates for 2019. Due to the erratic nature of the Statistics Canada data, average spending was estimated using a growth index calculated based on the change in spending for all travel from the Statistics Canada surveys.

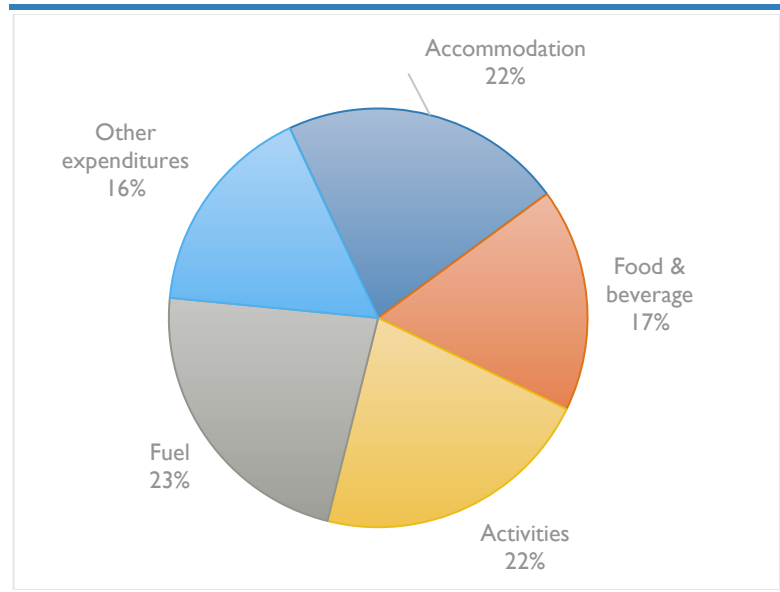
For this edition of the economic impact study, spending data was collected through the consumer survey for the most recent RV trip for a number of spending categories. The average per person, per night spending from the survey for RV trips is \$134, which is in line with the estimate from the 2022 Statistics Canada data of \$130. The finding suggests that the average spending estimates sourced from Statistics Canada, and subsequent aggregate spending estimates calculated with these numbers resulted in a significant underestimation of RV travel impact in 2017 and 2019.

For this and future studies, estimates will be based on spending obtained from the consumer survey. The consumer survey provides a more inclusive estimate of RV travel spending than the Statistics Canada survey. Specifically, the consumer survey for the study includes all RV travel whereas the Statistics Canada data is selected based on those whose mode of transportation was an RV. The latter potentially excludes RV travel where the RV is towed by another vehicle. While Statistics Canada data will be used as a validation point, the consumer survey is expected to provide more consistency in the estimates.

TRAVEL SPENDING

As shown in **Exhibit 5-6**, the largest expenditure on overnight RV trips are fuel (23%), accommodation (22%) and activities (22%) which each account for just over one-fifth of the spend. At 17%, food and beverage is lower followed by other expenditures (16%).

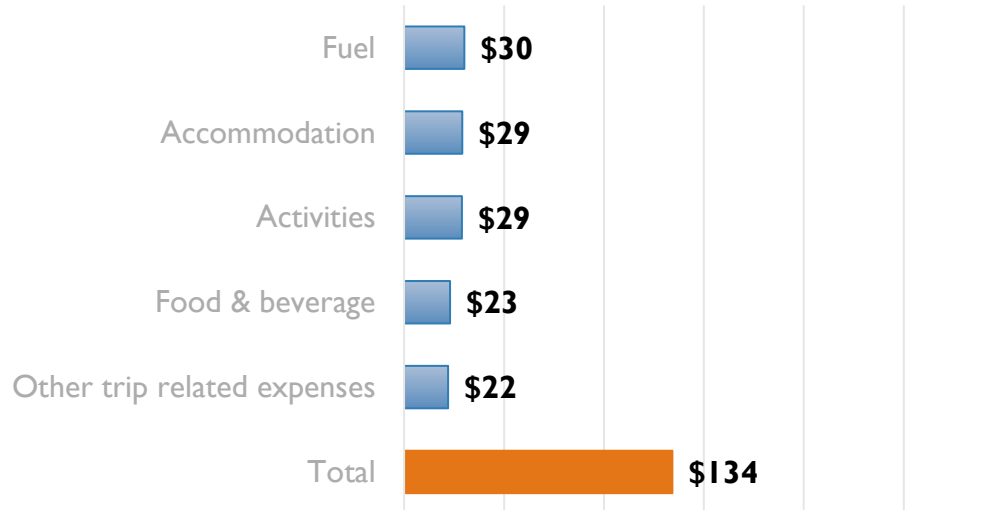
Exhibit 5-6 – Allocation of Overnight RV Trip Expenditures (per person/per night)



Source: TPG online survey of RV owners, May 2023.

The average overnight RV trip expense was \$134 per person per night in 2022. Average overnight trip spending per person per night by category is presented in **Exhibit 5-7**. It should be noted that expenditure values include all overnight RV travellers, including those with a \$0 expenditure in the category.

Exhibit 5-7: Average Per Person/Per Night Overnight RV Trip Expenditures in 2022



Source: TPG online survey of 1,046 RV owners, May 2023.

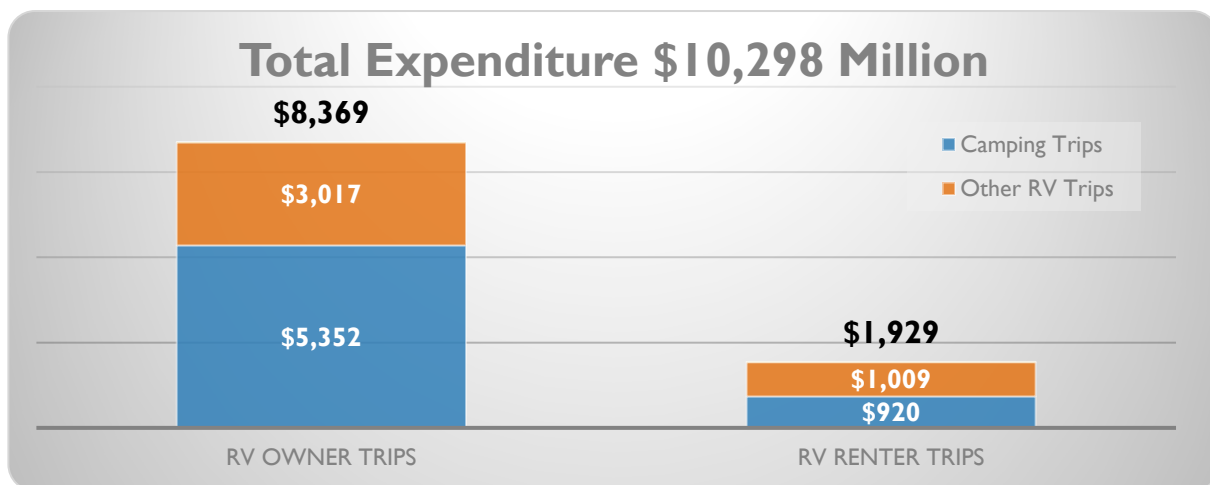
Notes: Totals may not sum due to rounding.

The aggregate expenditures are generated by multiplying the average expenditures by the number of RV person trip nights taken in Canada in 2022 by RV owners and renters. As seen in **Exhibit 5-7**, total aggregate RV travel spending is estimated at \$10.3 billion for 2022. Of this, \$8.4 billion was spent by RV owners and \$1.9 billion was spent by RV renters.

Also shown in the exhibit, the aggregate trip expenditures are also split between camping trips and other RV trips. In total, almost \$6.3 billion of spending on RV trips was for RV camping trips (\$5.4 billion for owners and \$0.9 billion for RV renters).

The regional breakdown of expenditures represents spending that took place by those from the region and not necessarily in the region of travel. At \$3.2 billion, the highest expenditures were from Quebec followed closely by Ontario at \$2.8 billion.

Exhibit 5-7: Aggregate RV Tourism Related Expenditures in 2022 (\$ millions)



	RV Owners	RV Renters	Total Expenditure
Atlantic	\$552.8	\$70.4	\$1,016.2
Quebec	\$2,325.8	\$463.4	\$3,212.6
Ontario	\$2,721.8	\$886.7	\$2,769.3
Prairies	\$591.2	\$73.3	\$617.0
Alberta	\$1,075.8	\$185.4	\$1,261.2
British Columbia	\$1,078.1	\$244.7	\$1,322.8

Source: TPG calculation based on the average spending on the most recent RV trip and the total number of trip nights from the TPG online survey, May 2023.

Note: Totals may not sum due to rounding.

On the surface, it appears that there has been a dramatic increase in the aggregate spending relating to RV tourism compared to the 2018 and 2020 studies. However, as noted earlier in this chapter, the source data obtained from Statistics Canada used in previous studies was inconsistent from study to study. Moreover, data collect in a survey for this year’s study, and more recent data from Statistics Canada, suggests that per person per night spending averages from Statistics Canada were significantly

lower than actual spending in many years, which resulted in a significant under estimation of RV travel spending in the last two studies.

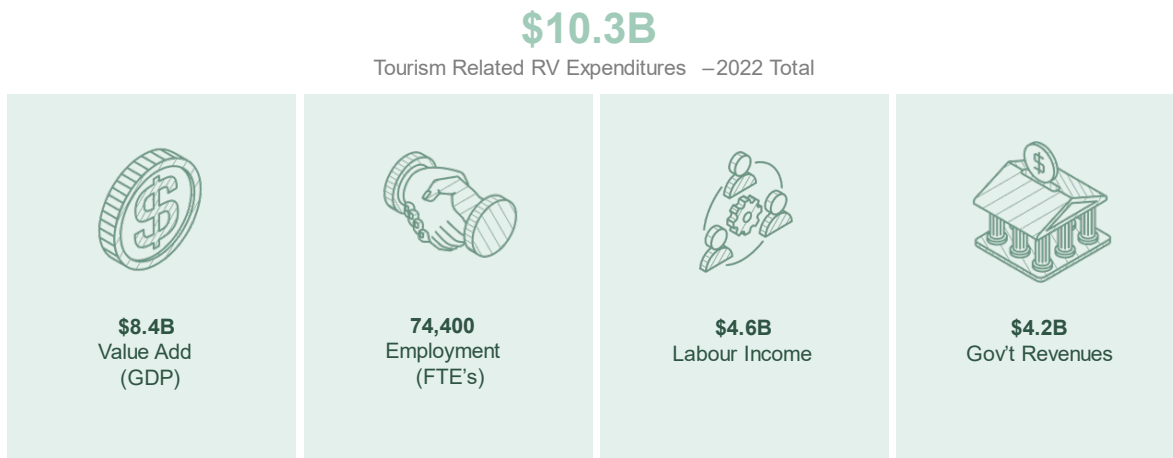
ECONOMIC IMPACT – TOURISM RELATED RV EXPENDITURES

Based on the background and supporting data presented in the previous subsection, it is estimated that RV owners spent a total of approximately \$10.3 billion on various goods and services while travelling throughout Canada in 2022. This includes spending on such items as food and beverage, vehicle operation (e.g., gas), recreation, entertainment, clothing, and several other categories relating to accommodation and transportation.

This spending generates a significant benefit to local municipalities, the provincial/territorial economies, as well as spread more broadly across Canada at the federal level.

- **± \$8.4 billion in value added** to the Canadian economy;
- **± 74,400 full-time years of employment**;
- **± \$4.6 billion in labour income** across Canada; and,
- **± \$4.2 billion in tax revenue** to municipal, provincial and national governments, in the form of personal tax, corporate tax, and other taxes.

Appendix 2 provides the detailed results of the economic impact analysis relating to tourism-related RV expenditures across Canada, including a breakdown by region.



As outlined in the figure above, tourism-related expenditures continue to be the dominant source of spending relating to the RV industry as a whole (i.e., relative to the other categories considered as part of this study: manufacturing, retail sales and service, non-travel expenditures). Consequently, the key economic impacts derived from this spending are equivalently significant, generating billions in value added for the Canadian economy and tens of thousands of jobs.

Overall, we note that the total economic impact is significant in 2022 subject to the data qualifications presented earlier in this chapter (i.e., inconsistent data, underestimation of RV travel spending in previous spending).

VI. NON-TRAVEL RELATED CAMPING EXPENDITURES

As noted earlier, a significant majority of RV owners use their RVs to camp. However, RV owners only represent a portion of all camping. The previous chapters focused specifically on the impact of RVs and RVing. The next two chapters take a broader looking at camping, including both RV owners and non-owners. This chapter looks at non-travel related expenditures and economic impact related to camping. These are the expenditures associated with being a camper that are not dependent on taking a trip and include equipment purchases, repairs, storage and season campsite fees (presented earlier).

NON-TRAVEL RELATED CAMPING EXPENDITURE ESTIMATES

APPROACH

As there is no existing data source for non-travel spending by campers, a survey was undertaken to determine the level of non-travel spending and the incidence of camping. More specifically, the survey was conducted with three audiences as follows:

- **Online Panel Survey – General Population:** TPG conducted an online web-based panel survey in May 2023 with 2,502 adults/households across Canada. A series of questions were also included to determine the incidence of camping related attributes/activity such as recency of camping experience, purchase, maintenance and storage of camping equipment and camping-related travel.
- **RV Owner Booster Sample:** To ensure a sufficient sample of RV owners, a survey was also conducted with a target panel sample that was pre-screened to be more likely to own an RV. When combined with the sample from the general population survey, a total of 1,046 RV owners were captured in the survey.
- **Camper Booster Sample:** To ensure a sufficient sample of campers, a survey was also conducted with a target panel sample that was pre-screened to be more likely to have camped in the last five years. When combined with the sample from the general population survey and RV campers from the RV owner booster sample, a total of 1,966 campers were captured in the survey.

Note: this is the same survey discussed in Chapter IV.

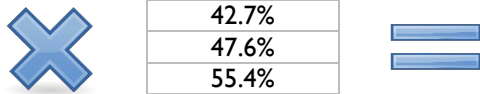
NUMBER OF CAMPING HOUSEHOLDS

The online panel survey included questions about the last time respondents had camped. For the purpose of the survey, respondents were provided with the following definition of camping:

For the purpose of this survey, “camping” includes tent camping, car camping, RV camping, backcountry camping and ready-to-camp units (tent, yurt, RV, trailer, fully equipped, belonging to the campground).

Because camping assets are often household assets, the economic impact analysis is based on the number of households that camp. As seen in **Exhibit 6-1**, the results revealed that approximately **45% of Canadian households have camped in the past five years**. By multiplying the total number of households in Canada (15 million) by the incidence of camping in the past five years, it is estimated that almost **6.8 million Canadian households have camped in the past five years**.

Exhibit 6-1: Household Who Camped in Past Five Years (2018 to 2022)

	Households ¹		Share That Camped Past 5 Years ²		Campers (household)
Atlantic	1,053,702		42.3%		447,371
Quebec	3,749,035		39.5%		1,487,807
Ontario	5,491,201		42.7%		2,355,911
Prairies	967,635		47.6%		462,784
Alberta	1,633,220		55.4%		908,965
British Columbia	2,041,834		53.9%		1,105,542
Canada	14,978,941		45.3%		6,787,554

Sources: ¹Statistics Canada Census 2021.

²TPG online general population survey, May 2023

Note: Totals may not sum due to rounding and the inclusion of the Territories at the national level.

It is important to note that the 6.8 million households that camped **includes RV owners who camped**. Moreover, the results indicate that approximately 1.9 million RV owners camped in the past five years.

Regionally, the incidence of camping is highest in Alberta (55%) and British Columbia (54%). At the other end of the spectrum, the incidence of camping is lowest in Quebec (40%), the Atlantic (42%) and Ontario (43%).

As illustrated in **Exhibit 6-2**, Ontario accounts for the largest share of households who camped in the past five years at 35%, which is slightly lower than the 37% of households located in Ontario. Similarly, Quebec accounts for 22% of campers compared to 25% of households. Conversely, Alberta (13% of campers vs. 11% of households) and British Columbia (16% vs. 14%) are slightly over-represented compared to their share of households. Despite these minor variances, the regional distribution of camping households is largely similar to the distribution of Canadian households.

Exhibit 6-2: Distribution of Camping Households in Past Five Years (2018 to 2022)



Sources: Statistics Canada Census 2021, TPG online survey, May 2023 and TPG calculation.

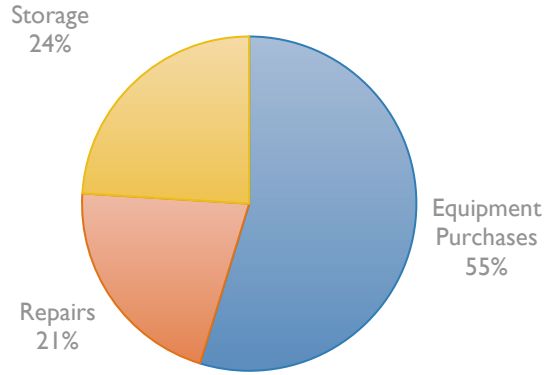
NON-TRAVEL SPENDING

The survey of campers asked respondents who had camped in the past five years to indicate how much they spent in 2022 in three areas not related to travel.

As shown in **Exhibit 6-3**, the largest non-travel related expenditures associated with camping is by far equipment purchases which account for 55% of spending. Storage accounts for 24% while repairs account for 21%.

It should be noted that RV owners who camped in the past five years were instructed to include only spending that was not included in the RV spending they had previously reported. It is likely that some of the RV spending on equipment and accessories was for camping related products. This spending is not included in this section.

Exhibit 6-3 – Allocation of Non-Travel Related Camping Spending



Source: TPG online survey of campers, May 2023.

As shown in **Exhibit 6-4**, campers spent an average of \$288 in non-travel expenditures in 2022. It should be noted that the average amount spent by category includes all campers, including those with a \$0 expenditure.

Exhibit 6-4: Non-Travel RV Expenditure per Household in 2022

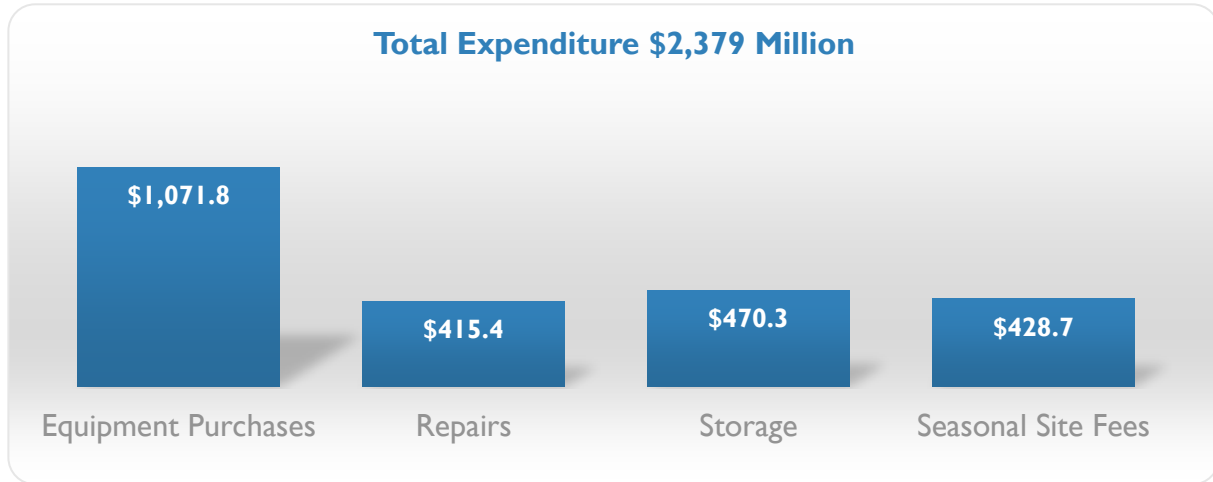
	Equipment Purchases	Repairs	Storage	Total
Atlantic	\$124	\$46	\$59	\$230
Quebec	\$171	\$73	\$74	\$318
Ontario	\$187	\$66	\$79	\$331
Prairies	\$123	\$45	\$39	\$207
Alberta	\$135	\$60	\$57	\$252
British Columbia	\$126	\$51	\$71	\$248
Canada	\$158	\$61	\$69	\$288

Source: TPG online survey of campers, May 2023.
 Note: Totals may not sum due to rounding.

To generate the aggregate expenditures, the average expenditures are multiplied by the number of camping households. As seen in **Exhibit 6-5**, the estimated total aggregate non-travel spending is \$1.96 billion for 2022. Of this, \$1.1 billion was spent on equipment purchases, \$415 million on repairs, \$470 million on storage and \$429 on seasonal site fees. It should be noted that seasonal site fees were previously presented as part of the RV non-travel expenditures (see Exhibit 4-5).

At \$779 million, the highest expenditures are in Ontario.

Exhibit 6-5: Aggregate Non-Travel Camping Expenditure (\$ millions) in 2022



	Equipment Purchases	Repairs	Storage	Seasonal Site Fees*	Total
Atlantic	\$55.6	\$20.5	\$26.5	\$49.8	\$151.7
Quebec	\$254.2	\$108.5	\$109.6	\$98.9	\$571.3
Ontario	\$440.1	\$154.0	\$184.8	\$207.7	\$986.6
Prairies	\$57.0	\$20.5	\$18.1	\$25.9	\$121.5
Alberta	\$122.8	\$54.2	\$51.3	\$28.2	\$256.4
British Columbia	\$139.1	\$56.5	\$78.6	\$17.7	\$291.8

Source: TPG calculation.

Notes: *Seasonal site fees for RV owners from Exhibit 4-5.
Totals may not sum due to rounding.

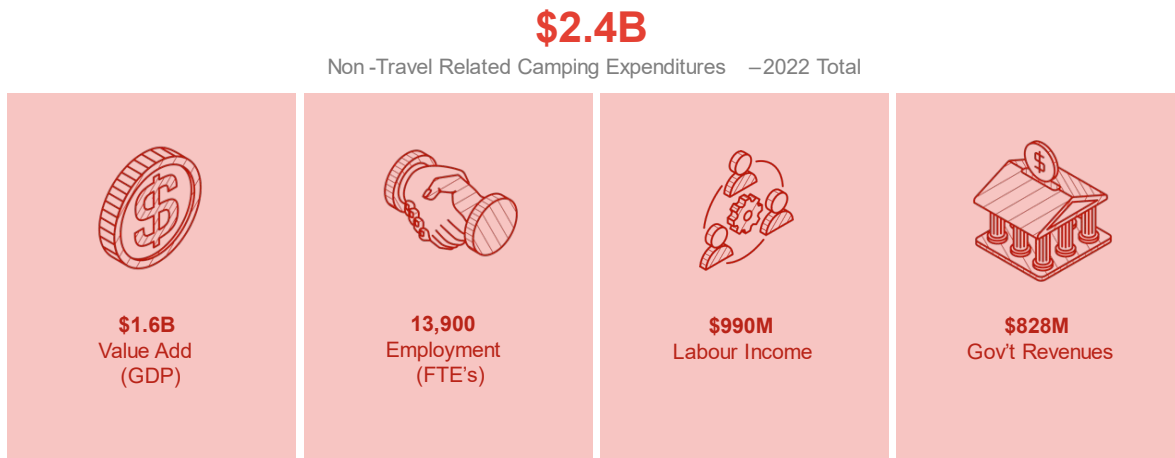
ECONOMIC IMPACT – NON-TOURISM CAMPING EXPENDITURES

Based on the background and supporting data presented in the previous subsection, it is estimated that campers (including RV owners who camped) spent a total of approximately \$2.4 billion on various camping goods and services unrelated to travel in 2022. This includes spending on such items as equipment purchases, repairs, and storage, as well as the previously described campground site fees.

This spending generates a significant benefit to local municipalities, the provincial/territorial economies, as well as spread more broadly across Canada at the federal level.

- **± \$1.6 billion in value added** to the Canadian economy;
- **± 13,900 full-time years of employment;**
- **± \$990 million in labour income** across Canada; and,
- **± \$828 million in tax revenue** to municipal, provincial and national governments, in the form of personal tax, corporate tax, and other taxes.

Appendix 2 provides the detailed results of the economic impact analysis relating to tourism-related RV expenditures across Canada, including a breakdown by region.



As noted earlier, some equipment and accessories reported by RV owners likely qualifies as camping equipment and accessories. As they were not separated out, these purchases are not included in the non-tourism camping expenditures.

The 2018 study did not report on non-travel camping activity. We note the initial non-tourism camping expenditure of \$2.4 billion represents approximately 12% of the total initial expenditure across all categories.

VII. TOURISM RELATED CAMPING EXPENDITURES

The final subsector included in the economic impact analysis is the camping tourism market. This includes all expenditures incurred from camping travel. These include expenditures such as campground fees, other accommodations, fuel, food and beverage, and activities.

TOURISM RELATED RV EXPENDITURE ESTIMATES

APPROACH

As with RV tourism spending, , the **Online Panel Survey** outlined in *Chapter IV* was used for all travel-related estimates including frequency of travel, trip characteristics and spending.

CAMPING TRIPS

As in the stated in the previous chapter, the online panel survey included questions about the last time respondents had camped. For the purpose of the survey, respondents were provided with the following definition of camping:

For the purpose of this survey, “camping” includes tent camping, car camping, RV camping, backcountry camping and ready-to-camp units (tent, yurt, RV, trailer, fully equipped, belonging to the campground).

In the previous chapter, the analysis was focused on all households who have camped in the past five years. The analysis in this chapter is based on only those who camped in 2022. As seen in **Exhibit 7-1**, the results revealed that approximately **29% of Canadian households camped in 2022**. By multiplying the total number of households in Canada (15 million) by the incidence of camping in 2022, it is estimated that almost **4.4 million Canadian households camped in 2022**. The includes all households that took a camping trip whether in an RV or not.

Exhibit 7-1: Households Who Camped in 2022

	Households ¹		Share That Camped in 2022 ²		Campers 2022 (household)
Atlantic	1,053,702		29.1%		307,366
Quebec	3,749,035		26.8%		1,008,954
Ontario	5,491,201		25.9%		1,424,563
Prairies	967,635		32.5%		315,394
Alberta	1,633,220		36.8%		602,286
British Columbia	2,041,834		35.2%		720,995
Canada	14,978,941		29.3%		4,391,964

Sources: ¹Statistics Canada Census 2021.



²TPG online survey, May 2023.

Note: Totals may not sum due to rounding and the inclusion of the Territories at the national level.

For the purpose of the economic impact analysis, it is necessary to isolate non-RV camping trips, spending and economic impact because the spending and economic impact associated with RV camping was calculated and presented as part of RV travel in Chapter V. For the total camping spending and economic impact, the results for non-RV and RV camping will be added together.

As seen in **Exhibit 7-2**, the results revealed that approximately **19% of Canadian households took a non-RV camping trip in 2022**. By multiplying the total number of households in Canada (15 million) by the incidence of non-RV camping in 2022, it is estimated that almost **2.8 million Canadian households took a non-RV camping trip in 2022**. Note, this includes RV owners who took a non-RV camping trip.

Exhibit 7-2: Households Who Non-RV Camped in 2022

	Households ¹		Share That Non-RV Camped in 2022 ²		Non-RV Campers 2022 (household)
Atlantic	1,053,702		19.9%		210,936
Quebec	3,749,035		15.9%		597,290
Ontario	5,491,201		15.1%		832,052
Prairies	967,635		23.1%		224,808
Alberta	1,633,220		27.0%		443,616
British Columbia	2,041,834		23.2%		476,353
Canada	14,978,941		18.6%		2,792,945



Sources: ¹Statistics Canada Census 2021.

²TPG online survey, May 2023.

Note: Totals may not sum due to rounding and the inclusion of the Territories at the national level.

As seen in **Exhibit 7-3**, results from the online panel survey indicate that non-RV campers (households) took an average of 2.0 non-RV camping trips in Canada in 2022. Additional trips taken to the US are excluded from this analysis. Multiplying the average number of trips by the number of non-RV camping households yields a **total of 5.5 million non-RV camping trips taken by non-RV campers** in Canada in 2022. As noted in Chapter V, RV owners and renters took 5.9 million RV camping trips in 2022. Combining these together reveals that **Canadian households took a total of 11.4 million camping trips in 2022**.

Exhibit 7-3: Non-RV Camping Trips in Canada in 2022

	Non-RV Campers 2022 (household) ¹		Avg. Non-RV Camping Trips in Canada (2022) ²		Total Non-RV Camping Trips in Canada
Atlantic	210,936		2.2		468,608
Quebec	597,290		1.5		900,271
Ontario	832,052		2.0		1,622,325
Prairies	224,808		2.1		468,052
Alberta	443,616		2.1		932,258
British Columbia	476,353		2.2		1,065,785
Canada	2,792,945		2.0		5,472,760

Sources: ¹TPG calculation per Exhibit 7-2.

²TPG online survey of campers, May 2023

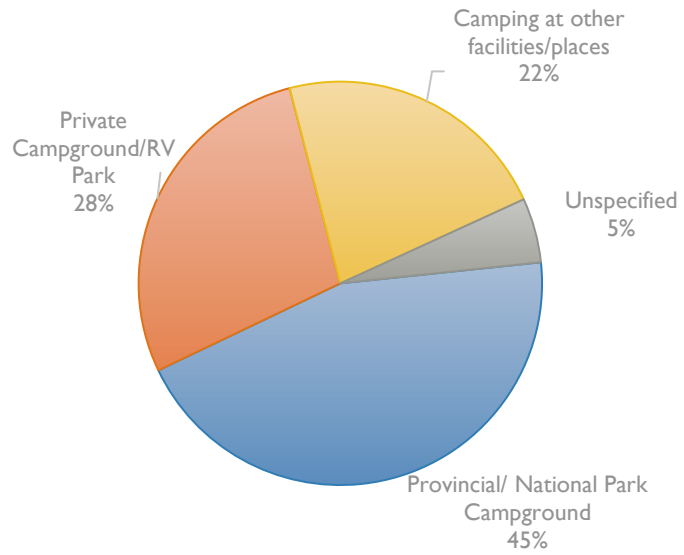
Note: Totals do not sum due to rounding and the inclusion of the Territories at the national level.

When accounting for the length of trip and travel party size, the 5.5 million non-RV camping trips translates into 46.3 million person trip nights. Combining this with RV camping yields a combined **total of 93.3 million person trip nights on camping trips in 2022**.

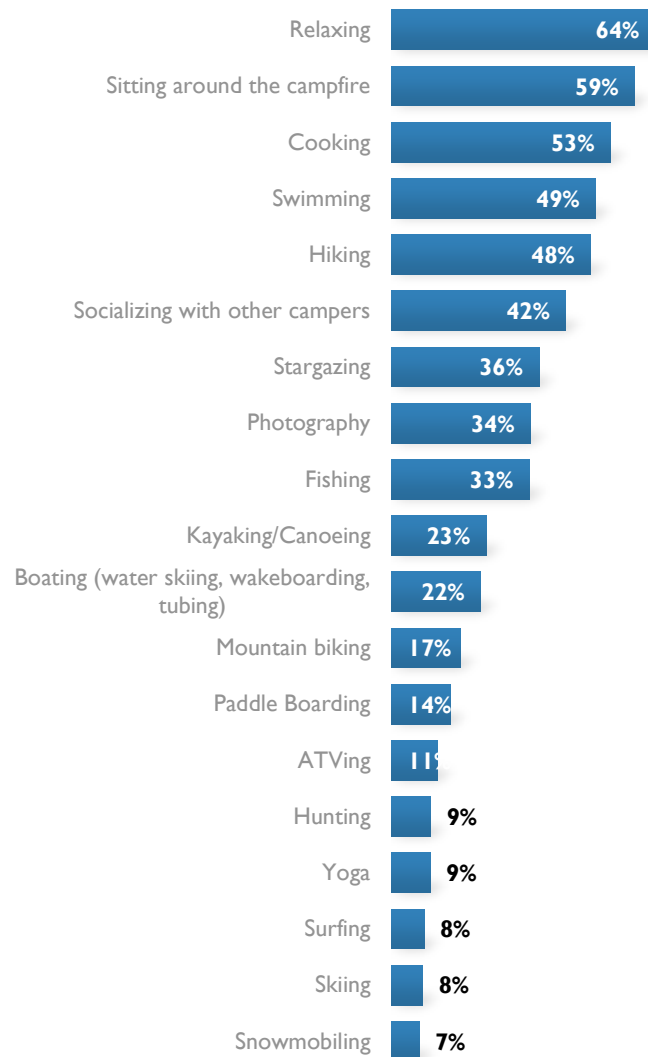
TRIP CHARACTERISTICS

Exhibit 7-4 shows the distribution on non-RV camping trip nights by location. This does not include RV camping trip nights. As shown, provincial/national parks are the most common at 45%. Private campgrounds/RV parks are next at 28% followed by other camping facilities/places at 22%.

Exhibit 7-4 – Non-RV Camping Trip Nights by Location



Source: TPG online survey of campers (non-RV), May 2023

Exhibit 7-5: Camping Trip Activities in 2022

Relaxation is clear a key objective for campers. As see in **Exhibit 7-5**, almost two-thirds (64%) of campers report relaxing as a camping trip activity in 2022 while 59% sat around the campfire. Rounding out the top five activities are cooking (53%), swimming (49%) and hiking (48%).

Other common activities include socializing with other campers (42%), stargazing (36%), photography (34%), fishing (33%), kayaking/canoeing (23%) and boating (water skiing, wakeboarding, tubing - 22%).

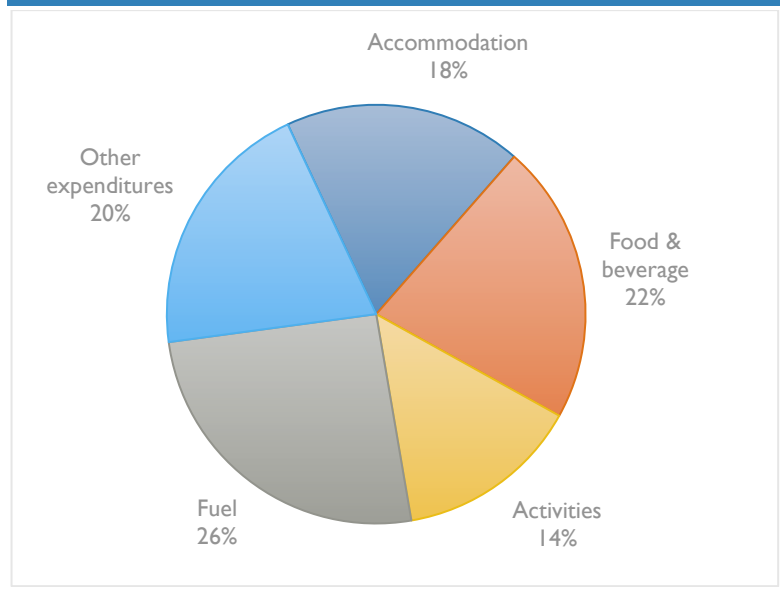
Source: TPG online survey of campers (all), May 2023.

NON-RV CAMPING TRAVEL SPENDING

Similar to RV travel, the largest expenditure on overnight non-RV camping trips is fuel (26%), followed by food and beverage (22%). At 14%, activities are the lowest with accommodation only slightly higher at 18%. The allocation of non-RV camping spending is presented in **Exhibit 7-6**.

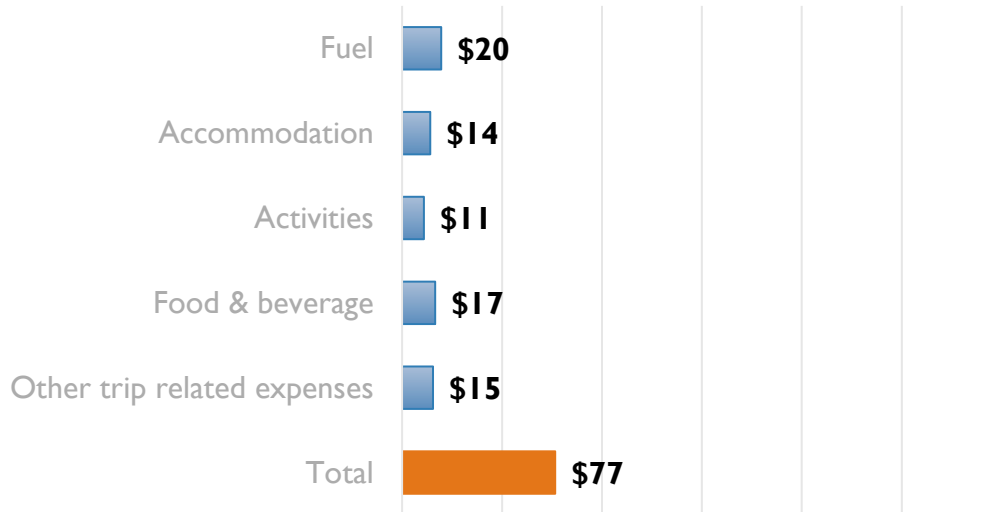
The average overnight non-RV camping trip expense was \$77 per person per night in 2022. Average overnight trip spending per person per night by category is presented in **Exhibit 7-7**. It should be noted that expenditure values include all overnight non-RV campers, including those with a \$0 expenditure in the category.

Exhibit 7-6 – Allocation of Overnight Non- RV Camping Trip Expenditures (per person/per night)



Source: TPG online survey of campers (non-RV), May 2023.

Exhibit 7-7: Average Per Person/Per Night Overnight Non-RV Camping Trip Expenditures in 2022



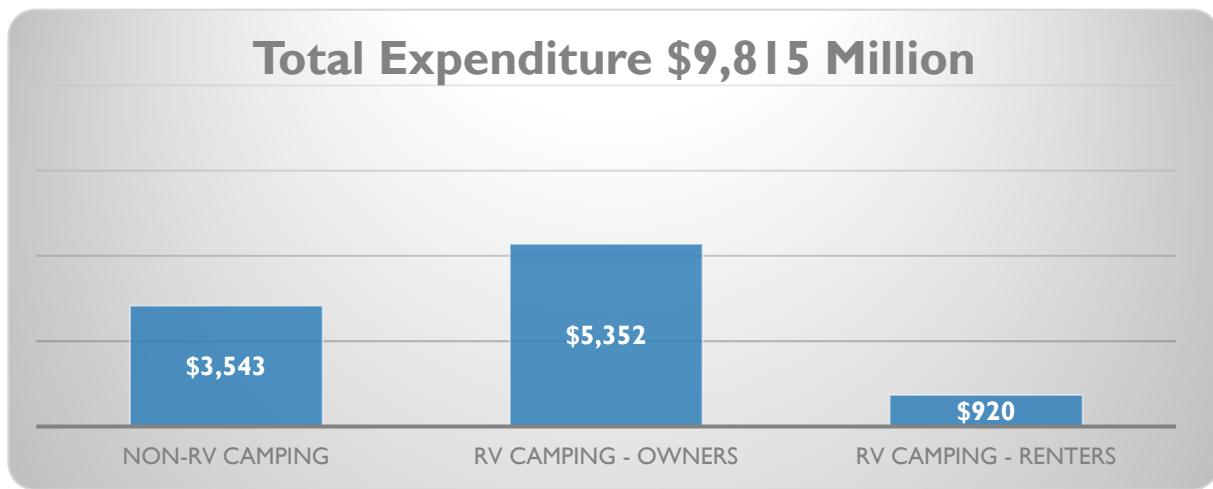
Source: TPG online survey of campers (non-RV), May 2023.

Notes: Totals may not sum due to rounding.

The aggregate expenditures are generated by multiplying the average expenditures by the number of person trip nights taken in Canada in 2022 by campers. As seen in **Exhibit 7-8**, total aggregate camping travel spending is estimated at \$9.8 billion for 2022. Of this, \$3.5 billion was generated from non-RV camping, \$5.4 billion was generated from RV camping by owners and \$0.9 billion was generated from camping by RV renters.

The regional breakdown of expenditures represents spending that took place by those from the region and not necessarily in the region of travel. At \$3.4 billion, the highest expenditures were from Ontario followed by Quebec at \$2.1 billion, Alberta at \$1.5 billion and British Columbia at \$1.25 billion.

Exhibit 7-8: Aggregate Camping Tourism Related Expenditures in 2022 (\$ millions)



	Non-RV Camping	RV Camping - Owners	RV Camping – Renters	Total Expenditure
Atlantic	\$231.1	\$434.2	\$43.8	\$709.2
Quebec	\$633.2	\$1,295.3	\$181.1	\$2,109.6
Ontario	\$1,207.2	\$1,916.1	\$333.5	\$3,456.8
Prairies	\$268.3	\$406.8	\$44.3	\$719.4
Alberta	\$645.2	\$741.1	\$154.4	\$1,540.7
British Columbia	\$548.5	\$543.0	\$160.1	\$1,251.6

Source: TPG calculation based on the average spending on the most recent camping trip and the total number of trip nights from the TPG online survey, May 2023.

Note: Totals may not sum due to rounding.

CAMPGROUND ACCOMMODATION REVENUE

The preceding analysis includes all spending related to camping and is based on consumer-reported spending. In addition to the consumer survey, a survey of campgrounds was also conducted to obtain key operating metrics. The section looks specifically at revenue related to campground accommodations. This is primarily comprised of tent, RV and seasonal campsite rentals, but also includes other “camping” accommodations such as yurts and cabins. It does not include hotel-style accommodations. The revenue in this section excludes non-accommodation revenue such as retail, equipment rentals and food and beverage.

Important Note: *Campground accommodation revenue is a sub-component of the total camping tourism-related expenditures of \$9.8 billion. Accordingly, it does not represent additional spending and should not be added to the total.*

APPROACH

Total campground accommodation revenues for federal parks and provincial parks campgrounds were obtained from Parks Canada and the parks organizations in each province for all campgrounds in their respective parks. Data for these organizations was obtained through Freedom of Information requests and annual report reviews.

As there is no existing data source for all other campgrounds, a survey of owners/managers of campgrounds was undertaken from November 29, 2023 to January 26, 2024. The survey focused on revenue, expenses and employment to provide the inputs necessary for developing an economic impact analysis. It did not capture a full profile of campgrounds. A total of 301 campgrounds participated in the survey.

All revenue data was for the 2022 calendar year or for the fiscal year that included the 2022 peak season.

Important Note: *The province of Quebec was not included in the campground survey because there was already a survey of campgrounds taking place at the same time. Accordingly, unless otherwise stated, campgrounds in Quebec are not included in the following analysis. Importantly, this exclusion applies only to this sub-component of the broader camping economic impact.*

NUMBER OF CAMPGROUNDS

There is no single data source that offers a complete count of campgrounds in Canada. While there is a NAICS code (discussed below) for RV parks and campgrounds, many campground facilities are part of larger businesses that operate under a different NAICS code. For example, there are many resort properties that, in addition to hotel-style accommodations, have camping facilities on their property. In this case, the business would most likely be classified as a hotel or motel (NAICS 72111) and not a campground (NAICS 721211). Accordingly, the campground would not be included in Statistics Canada’s business counts for the RV parks and campground NAICS code.

Because of these challenges, two approaches have been used to estimate the number of campgrounds in Canada:

- **Statistics Canada Business Counts - Conservative Approach:** While the Statistics Canada business counts likely underestimate the number of campgrounds for the reasons outlined earlier, it does represent an official count of businesses within the RV parks and campground NAICS code and it is tracked semi-annually. The counts are based on both businesses with and without employees and are based on NAICS code 721211 – Recreational Vehicle (RV) parks and campgrounds. The definition for this NAICS code is:

“This Canadian industry comprises establishments primarily engaged in operating serviced or unserviced sites to accommodate campers and their equipment.”¹

- **Campground Inventory – Aggressive Approach:** The second approach involved compiling an inventory of campgrounds from provincial associations, provincial destination marketing organizations and other sector directories. Unlike the Statistics Canada counts, the inventory does include businesses where the campground is not the primary business. While the compilation involved a thorough search and review of data sources, there is no guarantee as to the completeness of the final inventory. Accordingly, the counts from this exercise represent the number of campground listings found.

The number of campgrounds by region based on both approaches is shown in **Exhibit 7-9**. The number of campgrounds from the inventory approach is significantly higher than the Statistics Canada NAICS counts in all regions except Ontario where the NAICS count is slightly higher. According to Statistics Canada, there were 2,808 businesses in 2022 whose primary business was as a campground, while the inventory process identified 3,779 campgrounds, including those that are primarily a campground and those that operate a campground as part of a larger business. These estimates represent the conservative and aggressive ends of the spectrum.

Exhibit 7-9: Number of Campgrounds Excluding Provincial Parks and Federal Parks

	Statistics Canada NAICS ¹ (2022)	Inventory ²
Atlantic	326	416
Quebec	664	1,045
Ontario	778	758
Prairies	234	466
Alberta	341	468
British Columbia	447	592
Territories	18	34
Canada	2,808	3,779

Source: ¹ Statistics Canada business counts with and without employees for NAISCS code 721211 (RV parks and campgrounds) for 2022; Tables 33-10-0661-01 and 33-10-0662-01.

² The inventory of campgrounds was compiled through a variety of sources including lists provided by provincial and regional campground associations, provincial destination marketing organizations and campground directories. The inventory includes private, municipal and not-for-profit campgrounds. It does not include provincial parks and federal parks campgrounds.

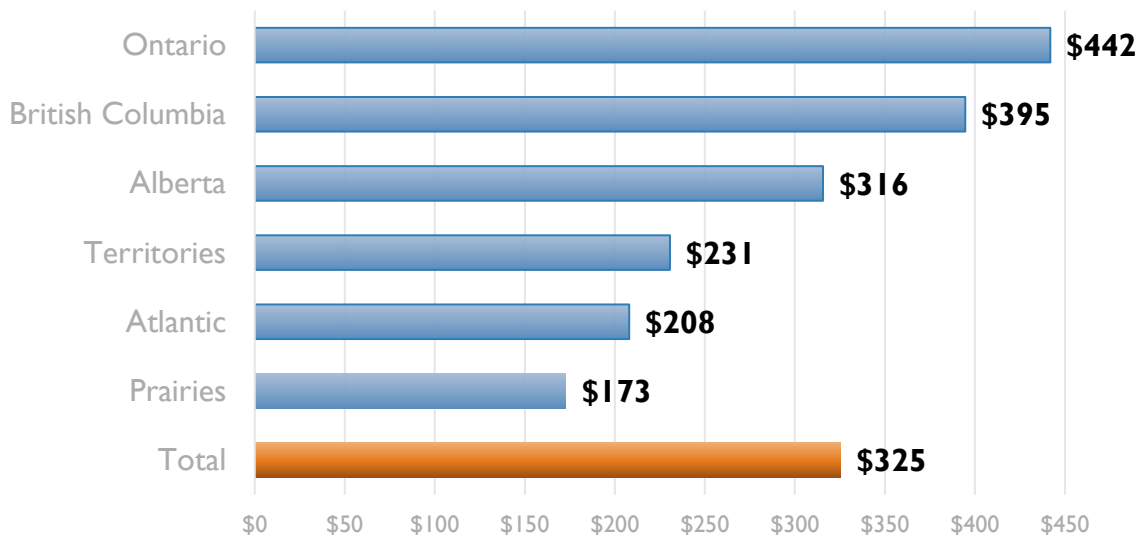
¹ Source: Statistics Canada - North American Industry Classification System (NAICS) Canada 2022 Version 1.0 (<https://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=1369825>)

It should be noted that the campground counts **do not include provincial park or federal park** campgrounds. The regional counts are provided for information purposes.

CAMPGROUND ACCOMMODATION REVENUE

Respondents to the campground survey were asked to report their total revenue for 2022 and to indicate what portion was derived from campsite rental and lodging fees. For campgrounds that operated other businesses, respondents were asked to report only revenue for the campground. On average, campgrounds report that approximately 85% of their total revenue is derived from campground accommodations. As illustrated in **Exhibit 7-10**, campgrounds in Canada, excluding Provincial and Federal parks, generated an average of \$325,000 from campground accommodations in 2022.

Exhibit 7-10: Average Campground Accommodation Revenue for 2022 (\$000s) (excl. Provincial Parks and Federal Parks)



Source: Survey of campgrounds and TPG calculations.

The highest average accommodation revenue was earned by campgrounds in Ontario at approximately \$442,000 in 2022 followed closely by British Columbia. Average accommodation revenue was lowest in the prairies at approximately \$173,000. Note that **results are not available for Quebec** as the province did not participate in the survey.

The total aggregate revenue for campground accommodations is calculated by summing the revenue from provincial parks, federal parks and other campgrounds. Total revenue for the provincial and federal parks was obtained from the respective parks organizations through freedom of information requests and publicly available annual reports. For other campgrounds, total accommodation revenue is calculated by multiplying the estimated number of campgrounds (conservative and aggressive) by the average revenue in each province or region.

As seen in **Exhibit 7-1 I**, total campground accommodation revenue, excluding Quebec, is estimated at \$951.8 million to \$1,102.8 million for 2022. This includes:

- Provincial parks - \$188.7 million
- Federal parks - \$23.0 million
- Other campgrounds - \$740.2 million to \$891.1 million

It is important to note that:

- These revenues do not include Quebec for the reasons previously stated.
- Campground accommodation revenue is a sub-component of the \$9.8 billion in total camping revenue as reported in Exhibit 7-8. For the included provinces, campground accommodations represent approximately 12% to 14% of the total spend.

Exhibit 7-1 I: Aggregate Campgrounds Accommodation Revenue in 2022 (millions)

	Provincial Parks	Federal Parks	Other Campgrounds		Total	
			Conservative	Aggressive	Conservative	Aggressive
Atlantic	\$17.5	\$7.5	\$67.8	\$86.5	\$92.9	\$111.6
Quebec	Not included				Not included	
Ontario	\$87.2	\$1.4	\$343.8	\$334.9	\$432.4	\$423.6
Prairies	\$19.6	\$1.8	\$40.4	\$80.5	\$61.9	\$101.9
Alberta	\$30.7	\$9.3	\$107.6	\$147.7	\$147.6	\$187.7
British Columbia	\$32.7	\$2.7	\$176.4	\$233.6	\$211.8	\$269.1
Territories	\$0.9	\$0.2	\$4.2	\$7.8	\$5.2	\$8.9
Canada (excl. QC)	\$188.7	\$23.0	\$740.2	\$891.1	\$951.8	\$1,102.8

Source: Provincial Park and Federal Park revenue provided by provincial and federal parks departments via freedom of information requests and annual reports.
All other revenue calculations come from TPG calculations.

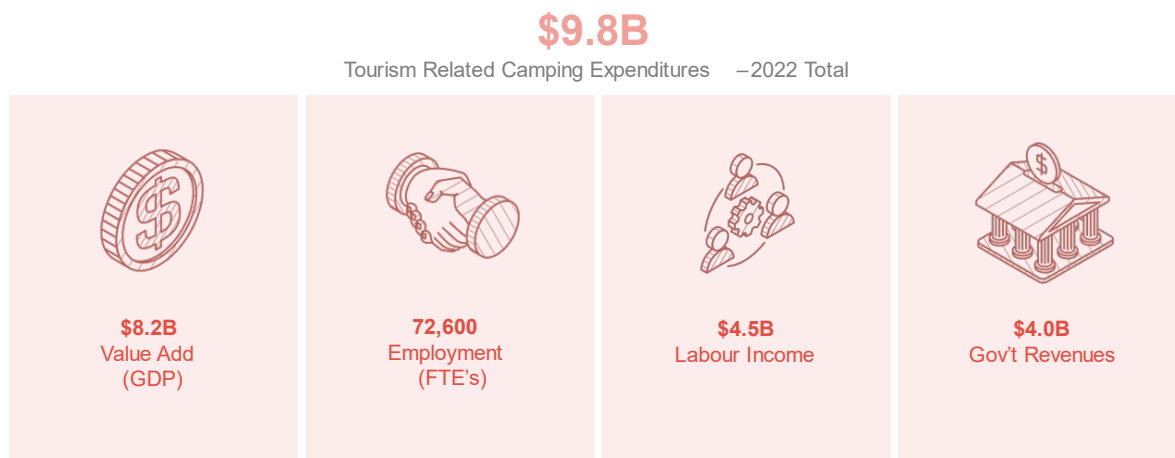
ECONOMIC IMPACT – TOURISM RELATED CAMPING EXPENDITURES

Based on the background and supporting data presented in the previous subsection, it is estimated that campers – both RV and non-RV - spent a total of approximately \$9.8 billion on various goods and services while camping throughout Canada in 2022. This includes spending on campground fees, other accommodations, fuel, food and beverage, and activities.

This spending generates a significant benefit to local municipalities, the provincial/territorial economies, as well as spread more broadly across Canada at the federal level.

- **± \$8.2 billion in value added** to the Canadian economy;
- **± 72,600 full-time years of employment**;
- **± \$4.5 billion in labour income** across Canada; and,
- **± \$4.0 billion in tax revenue** to municipal, provincial and national governments, in the form of personal tax, corporate tax, and other taxes.

Appendix 2 provides the detailed results of our economic impact analysis relating to tourism-related camping expenditures across Canada, including a breakdown by region.



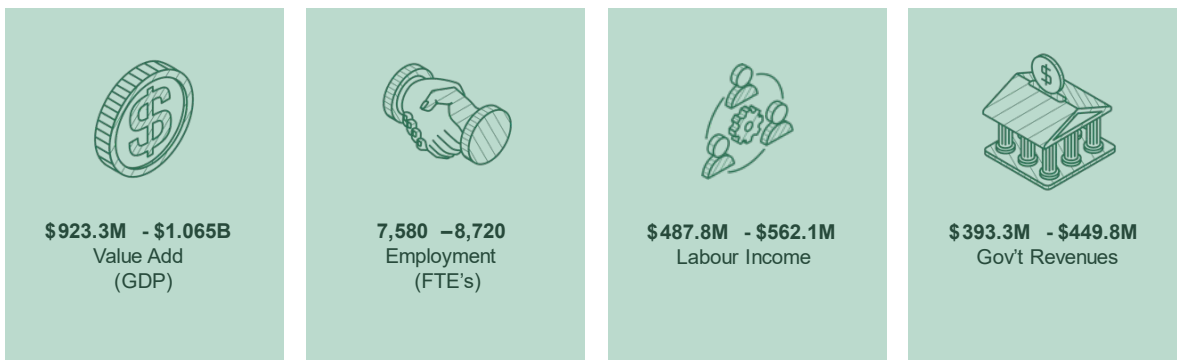
The 2018 study did not include comprehensive reporting on tourism-related camping activity. We note the initial tourism-related camping expenditure of \$9.8 billion represents approximately half (49.6%) of the total initial expenditure across RV and camping.

As a subset of total camping activity, the economic impact of campground accommodation expenditures across Canada in 2022 was substantial. Based on the two scenarios evaluated, between \$952 million and \$1.1 billion was spent on campground lodging in 2022 across Canada. These expenditures created significant spin-off benefits to communities and governments of all levels across Canada, including the following impacts:

- **± \$923 million - \$1.1 billion in value added** to the Canadian economy;
- **± 7,600 - 8,700 full-time years of employment**;
- **± \$488 - \$562 million in labour income** across Canada;
- **± \$393 - \$450 million in tax revenues** to municipal, provincial and federal governments in the form of personal tax, corporate tax and other taxes.

\$951.8M - \$1.103B

Private + Provincial + Federal Campground Fees (2022)



Note: *Quebec excluded in its entirety, though we note that some “indirect” and “induced” benefits are captured in the Province as a function of campground fees generated in other provinces / territories. Results for Canada-wide impacts will vary depending on the preferred inclusion / exclusion of these impacts.

VIII. SUMMARY

The RV sector stimulates economic activity and creates jobs for Canadians across the country. Across all four subsectors, total RV industry expenditures for 2022 have been estimated at approximately \$14.3 billion (see **Exhibit 8-1**). This includes spending on all facets of the industry, including manufacturing, retail, ownership and tourism. The initial expenditure translates into:

- **± \$20.8 billion in economic activity;**
- **± \$12.0 billion in value added** to the Canadian economy;
- **±104,200 full-time years of employment.**
- **± \$6.8 billion in labour income** across Canada; and,
- **± \$5.5 billion in tax revenue** to municipal, provincial and national governments, in the form of personal tax, corporate tax, and other taxes.

Exhibit 8-1: Total Economic Impact Summary of the RV Industry for 2022

	Retail Sales and Service ¹	Manufacturing	Non-Travel Expenditures	Tourism Expenditures	Total for Canada
Initial Expenditure (\$000's)	\$707,600	\$620,500	\$2,668,300	\$10,298,500	\$14,294,900
Gross Output (\$000's)	\$1,446,500	\$1,048,500	\$4,122,500	\$14,158,600	\$20,776,100
GDP (Value Added) (\$000's)	\$884,500	\$388,400	\$2,243,000	\$8,440,700	\$11,956,600
Jobs	8,500	3,500	17,800	74,400	104,200
Labour Income (\$000's)	\$592,000	\$250,300	\$1,325,600	\$4,615,100	\$6,783,000
Total Taxes (\$000's)	\$120,300	\$135,600	\$1,071,200	\$4,201,000	\$5,528,100

Source: Statistics Canada I/O Model based on TPG calculations.

Note: Totals may not sum due to rounding.

While manufacturers and dealers create a significant impact, the consumer side (non-travel and travel) of the sector drives 89% of the value added to the economy.

In addition to the RV sector, the study also assessed the camping sector. The camping sector stimulates economic activity and creates jobs for Canadians across the country. Across both subsectors, total camping sector expenditures for 2022 have been estimated at approximately \$12.2 billion (see **Exhibit 8-2**). This includes spending on purchases, repairs and storage of camping equipment and tourism. The initial expenditure translates into:

- **± \$18.3 billion in economic activity;**
- **± \$9.8 billion in value added** to the Canadian economy;
- **±86,500 full-time years of employment.**
- **± \$5.5 billion in labour income** across Canada; and,
- **± \$4.8 billion in tax revenue** to municipal, provincial and national governments, in the form of personal tax, corporate tax, and other taxes.

Exhibit 8-2: Total Economic Impact Summary of the Camping Sector for 2022

	Non-Travel Expenditures	Tourism Expenditures	Total for Canada
Initial Expenditure (\$000's)	\$2,386,100	\$9,815,000	\$12,201,100
Gross Output (\$000's)	\$2,901,200	\$15,436,800	\$18,338,000
GDP (Value Added) (\$000's)	\$1,583,600	\$8,221,500	\$9,805,100
Jobs	13,900	72,600	86,500
Labour Income (\$000's)	\$989,800	\$4,494,400	\$5,484,200
Total Taxes (\$000's)	\$827,600	\$3,997,600	\$4,825,200

Source: Statistics Canada I/O Model based on TPG calculations.

Note: Totals may not sum due to rounding.

While non-travel expenditures create a significant impact, camping trips (travel) drive 80% of the value added to the economy.

When combining the expenditures and impacts of the RV and camping sectors, it is important to recognize that there is considerable overlap due to the fact that RV owners report that 77% of their RV trips in 2022 were to a campground. As seen in **Exhibit 8-3**, after accounting for the overlap, the two sectors accounted for a combined estimated initial expenditure of \$19.8 billion in 2022. This initial expenditure translates into:

- **± \$28.8 billion in economic activity;**
- **± \$16.2 billion in value added** to the Canadian economy;
- **±141,400 full-time years of employment.**
- **± \$9.2 billion in labour income** across Canada; and,
- **± \$7.6 billion in tax revenue** to municipal, provincial and national governments, in the form of personal tax, corporate tax, and other taxes.

Exhibit 8-3: Total Economic Impact Summary of the RV Industry and Camping Sector Combined for 2022

	RV Industry	Camping Sector	Overlap (to be removed)	Total for Canada
Initial Expenditure (\$000's)	\$14,294,900	\$12,201,100	\$6,700,300	\$19,795,700
Gross Output (\$000's)	\$20,776,100	\$18,338,000	\$10,322,300	\$28,791,800
GDP (Value Added) (\$000's)	\$11,956,600	\$9,805,100	\$5,583,800	\$16,177,900
Jobs	104,200	86,500	49,300	141,400
Labour Income (\$000's)	\$6,783,000	\$5,484,200	\$3,074,200	\$9,193,000
Total Taxes (\$000's)	\$5,528,100	\$4,825,200	\$2,744,200	\$7,609,100

Source: Statistics Canada I/O Model based on TPG calculations.

Note: Totals may not sum due to rounding.

Detailed tables summarizing the economic activity and impact by subsector and region can be found in *Appendix 2*.

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Recreation Vehicle Dealers Association of Canada Statistics / National RV Retail Statistics (Statistical Surveys Inc.).

Economic impact of the Canadian Recreation Vehicle Industry (April 2018, The Portage Group Inc. and urbanMetrics Inc. on behalf of RVDA).

APPENDIX I – ECONOMIC IMPACT APPROACH

MODEL OVERVIEW

The quantitative economic impacts of expenditures relating to RV manufacturing, retail sales and service, non-travel spending and tourism spending have been estimated using Statistics Canada Input-Output multipliers, which simulate the flow of expenditures through the economy. The same approach has been applied to evaluating non-travel and tourism-based spending specific to the Camping industry.

The main steps in running this type of economic impact modelling are:

- Compiling the input spending data.
- Assembling the data to ensure all expenses are accounted for and divided into categories to ensure that the individual economic sectors are appropriately represented.
- Running the finalized version of the models.

The data assembly stage for this analysis involved allocating a series of expenditure items to specific industry sectors using the North American Industry Classification System (NAICS), as well as the more detailed industry sub-categories identified in the latest available Statistics Canada input-output economic impact model.

IMPACT COMPONENTS

The basic principle of the economic impact modelling undertaken for this assignment is the concept that each dollar of expenditure on goods and/or services purchased from a given industry sector circulates and re-circulates within the economy, thereby multiplying the effects of the original expenditure. This process is commonly referred to as the multiplier effect. An estimated multiplier for the spending associated with both the RV and Camping industry has three distinct components: **direct**, **indirect** and **induced** impacts.

DIRECT IMPACTS

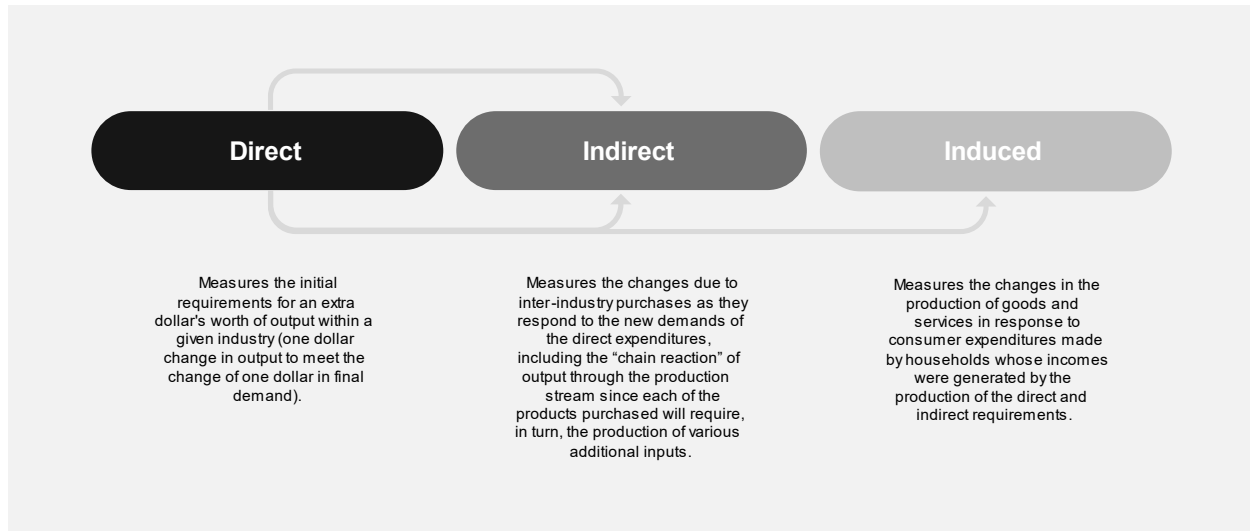
Represent the initial capital and/or operating investments made. These expenditures include the purchase of labour, equipment, other infrastructure and related services.

INDIRECT IMPACTS

Represent the subsequent purchases by suppliers required to produce the goods/services related to the original and ongoing investments.

INDUCED IMPACTS

Result when workers employed in the sectors, stimulated by direct and indirect expenditures, spend portions of their incomes on consumer goods and services.



Source: Parcel, based on definitions available from Statistics Canada.

IMPACT METRICS

Direct, indirect and induced impacts are estimated in terms of the following measures:

GROSS OUTPUT

A measure of total sales throughout the economy in question, as a result of an initial and ongoing expenditures on goods and/or services produced by an industry¹.

VALUE ADDED (GDP)

The total unduplicated value of goods and services produced in the economic territory, determined by subtracting the value of the goods and services used in generating the gross output.

FULL-TIME EQUIVALENT EMPLOYMENT (FTE'S)

Total full-time, full-year jobs generated by direct, indirect and induced expenditures. For one-time capital and ongoing expenditures, such as those being analyzed, the employment figures produced by the model represent years of full-time employment. For example, one job identified by the model represents the equivalent of one person working full-time for the duration of one year².

¹ For example, with respect to a single construction project, an initial expenditure would be made to pay for the design firm and contractor. The design team would then hire staff, purchase equipment and materials, such as computers, software, paper, etc. The construction company, would also hire labourers, pay for construction equipment and materials. The staff in turn would purchase goods and services from their wages to support their everyday living. The sum of all of these expenditures would be the gross output. We do note that this involves double counting (e.g., the initial expenditure, in reality covered wages and salaries, equipment, etc. of the contractors it hired).

² These employment figures represent the total full-time, full-year jobs generated by direct expenditures, as well as the indirect and induced impacts that are spread more broadly throughout the national economy.

LABOUR INCOME





Total value of wages, salaries and benefits received by employees associated with direct, indirect and induced expenditure.

GOVERNMENT REVENUES

Revenues accruing to federal, provincial and local jurisdictions as a result of direct, indirect and induced expenditures. Revenue categories include personal and corporate income tax, sales taxes (e.g., GST), property taxes and other miscellaneous taxes, tariffs and fees.

KEY REPORTING METRICS

Although our comprehensive modelling includes articulation of all five key reporting metrics identified above, we typically focus on what we believe to be the most important and illustrative of the true incremental expansion to the economy: value added GDP, full-time equivalent employment, and government revenues. For the purposes of this reporting and for consistency with previous economic impact reporting, we have also highlighted labour incomes as a key variable in this context.

			
Value Add (GDP)	Employment (FTE's)	Labour Income	Gov't Revenues
<p>The total unduplicated value of goods and services produced.</p> <p>This amount is determined by subtracting the value of the goods and services used in the process of generating the gross output (i.e., the measure of total sales throughout the economy as a result of the initial "shock" expenditure).</p>	<p>Total full-time, full-year jobs generated by direct, indirect and induced expenditures.</p> <p>Based on total hours worked, intended to represent the equivalent to years of full-time employment. For example, one job identified represents the equivalent of one person working full-time for the duration of one year.</p>	<p>Total value of wages, salaries and benefits received by employees associated with direct, indirect and induced expenditures.</p> <p>This is a companion metric relating to the total employment generated by the same initial expenditures.</p>	<p>Represents an extensive subset of revenues accruing to federal, provincial and local jurisdictions as a result of direct, indirect and induced expenditures.</p> <p>Includes personal and corporate income tax, sales tax and other miscellaneous fees and charges levied by governments.</p>

Source: Parcel, based on definitions available from Statistics Canada.

ASSUMPTIONS & LIMITATIONS

The scope of work and approach utilized for this assignment have been informed not only by our previous experience and expertise as longstanding economic advisors to public and private sector clients across Canada, but also based on our commitment to continuously improving upon and updating our methodologies to reflect best practices for this type of research. Consequently, we are confident that this assessment offers the best possible approach to completing this assignment, however when dealing with this type of high-level economic analysis, it is nonetheless important to identify the key assumptions and limitations inherent to our approach.

Furthermore, we note that the modelling process presented should not be taken as conclusive nor definitive representation of the actual economic impacts of the RV and Camping industries. Instead, this type of assessment is intended to provide a more general and preliminary understanding of the relative magnitude of these impacts based on the assumptions provided, as well as to articulate the key drivers of this new economic activity.

APPENDIX 2 – DETAILED ECONOMIC IMPACT TABLES

RV MANUFACTURING IMPACTS

RV Manufacturing

	ATLANTIC	QUEBEC	ONTARIO	MANITOBA	SASKATCHEWAN	ALBERTA	BRITISH COLUMBIA	TERRITORIES	CANADA
Initial Expenditure	\$ 2,900,000	\$ 155,900,000	\$ 41,000,000	\$ 212,900,000	\$ 151,100,000	\$ 3,100,000	\$ 53,700,000	\$ -	\$ 620,500,000
Impact: Gross Output									
<i>Direct</i>	\$ 2,900,000	\$ 155,900,000	\$ 41,000,000	\$ 212,900,000	\$ 151,100,000	\$ 3,100,000	\$ 53,700,000	\$ -	\$ 620,500,000
<i>Indirect</i>	\$ 2,900,000	\$ 56,400,000	\$ 82,700,000	\$ 54,700,000	\$ 28,700,000	\$ 20,300,000	\$ 18,700,000	\$ 100,000	\$ 264,500,000
<i>Induced</i>	\$ 2,300,000	\$ 27,500,000	\$ 40,600,000	\$ 36,000,000	\$ 23,500,000	\$ 14,200,000	\$ 19,200,000	\$ 100,000	\$ 163,400,000
Total	\$ 8,100,000	\$ 239,800,000	\$ 164,200,000	\$ 303,700,000	\$ 203,200,000	\$ 37,600,000	\$ 91,600,000	\$ 300,000	\$ 1,048,500,000
Multiplier	2.79	1.54	4.00	1.43	1.34	12.13	1.71	-	1.69
Impact: Value Added									
<i>Direct</i>	\$ 900,000	\$ 35,100,000	\$ 11,500,000	\$ 61,900,000	\$ 40,100,000	\$ 900,000	\$ 19,500,000	\$ -	\$ 170,000,000
<i>Indirect</i>	\$ 1,300,000	\$ 25,900,000	\$ 34,200,000	\$ 26,800,000	\$ 12,900,000	\$ 10,400,000	\$ 9,800,000	\$ 100,000	\$ 121,300,000
<i>Induced</i>	\$ 1,200,000	\$ 15,600,000	\$ 22,600,000	\$ 23,500,000	\$ 14,900,000	\$ 7,300,000	\$ 11,900,000	\$ 100,000	\$ 97,100,000
Total	\$ 3,400,000	\$ 76,600,000	\$ 68,200,000	\$ 112,200,000	\$ 68,000,000	\$ 18,600,000	\$ 41,200,000	\$ 100,000	\$ 388,400,000
Multiplier	3.78	2.18	5.93	1.81	1.70	20.67	2.11	-	2.28
Impact: Employment (Full-Time, Full-Year Employment)									
<i>Direct</i>	-	300	100	700	600	-	200	-	2,000
<i>Indirect</i>	-	200	200	200	100	100	100	-	900
<i>Induced</i>	-	100	200	100	100	-	100	-	600
Total	-	600	500	1,100	700	100	400	-	3,500
Multiplier	-	2.00	5.00	1.57	1.17	-	2.00	-	1.75
Impact: Labour Income									
<i>Direct</i>	\$ 700,000	\$ 24,200,000	\$ 9,700,000	\$ 49,400,000	\$ 33,900,000	\$ 800,000	\$ 16,500,000	\$ -	\$ 135,200,000
<i>Indirect</i>	\$ 800,000	\$ 15,600,000	\$ 21,300,000	\$ 15,200,000	\$ 7,200,000	\$ 5,600,000	\$ 6,100,000	\$ -	\$ 71,900,000
<i>Induced</i>	\$ 600,000	\$ 7,700,000	\$ 11,600,000	\$ 9,200,000	\$ 5,600,000	\$ 3,400,000	\$ 5,100,000	\$ -	\$ 43,200,000
Total	\$ 2,100,000	\$ 47,500,000	\$ 42,600,000	\$ 73,900,000	\$ 46,700,000	\$ 9,700,000	\$ 27,700,000	\$ 100,000	\$ 250,300,000
Impact: Total Taxes									
<i>Federal</i>	\$ 700,000	\$ 9,200,000	\$ 12,800,000	\$ 22,100,000	\$ 14,500,000	\$ 3,100,000	\$ 8,100,000	\$ -	\$ 70,600,000
<i>Provincial</i>	\$ 500,000	\$ 12,900,000	\$ 8,400,000	\$ 15,800,000	\$ 12,400,000	\$ 1,600,000	\$ 4,900,000	\$ -	\$ 56,500,000
<i>Local</i>	\$ 100,000	\$ 1,900,000	\$ 2,100,000	\$ 2,600,000	\$ 700,000	\$ 500,000	\$ 700,000	\$ -	\$ 8,500,000
Total	\$ 1,300,000	\$ 24,000,000	\$ 23,300,000	\$ 40,500,000	\$ 27,700,000	\$ 5,200,000	\$ 13,700,000	\$ -	\$ 135,600,000

Note: Totals may not add due to rounding.

RV RETAIL SALES AND SERVICE IMPACTS

RV Retail Sales and Service

	ATLANTIC	QUEBEC	ONTARIO	MANITOBA	SASKATCHEWAN	ALBERTA	BRITISH COLUMBIA	TERRITORIES	CANADA
Initial Expenditure	\$ 70,100,000	\$ 115,900,000	\$ 181,700,000	\$ 24,300,000	\$ 31,300,000	\$ 199,800,000	\$ 84,100,000	\$ 400,000	\$ 707,600,000
Impact: Gross Output									
<i>Direct</i>	\$ 70,100,000	\$ 115,900,000	\$ 181,700,000	\$ 24,300,000	\$ 31,300,000	\$ 199,800,000	\$ 84,100,000	\$ 400,000	\$ 707,600,000
<i>Indirect</i>	\$ 22,900,000	\$ 55,000,000	\$ 119,100,000	\$ 9,800,000	\$ 9,700,000	\$ 75,800,000	\$ 40,000,000	\$ 300,000	\$ 332,500,000
<i>Induced</i>	\$ 27,800,000	\$ 62,800,000	\$ 144,800,000	\$ 12,900,000	\$ 12,900,000	\$ 92,100,000	\$ 52,700,000	\$ 400,000	\$ 406,400,000
Total	\$ 120,800,000	\$ 233,700,000	\$ 445,600,000	\$ 47,000,000	\$ 53,900,000	\$ 367,600,000	\$ 176,800,000	\$ 1,100,000	\$ 1,446,500,000
<i>Multiplier</i>	1.72	2.02	2.45	1.93	1.72	1.84	2.10	2.75	2.04
Impact: Value Added									
<i>Direct</i>	\$ 45,600,000	\$ 77,700,000	\$ 115,000,000	\$ 16,000,000	\$ 21,800,000	\$ 133,800,000	\$ 53,400,000	\$ 300,000	\$ 463,600,000
<i>Indirect</i>	\$ 12,500,000	\$ 29,600,000	\$ 65,300,000	\$ 5,300,000	\$ 5,400,000	\$ 41,800,000	\$ 22,300,000	\$ 200,000	\$ 182,400,000
<i>Induced</i>	\$ 16,900,000	\$ 35,300,000	\$ 82,700,000	\$ 7,700,000	\$ 7,600,000	\$ 55,300,000	\$ 32,800,000	\$ 200,000	\$ 238,500,000
Total	\$ 75,000,000	\$ 142,600,000	\$ 263,000,000	\$ 29,000,000	\$ 34,700,000	\$ 230,900,000	\$ 108,600,000	\$ 700,000	\$ 884,500,000
<i>Multiplier</i>	1.64	1.84	2.29	1.81	1.59	1.73	2.03	2.33	1.91
Impact: Employment (Full-Time, Full-Year Employment)									
<i>Direct</i>	600	800	1,500	200	200	1,600	600	-	5,600
<i>Indirect</i>	100	200	500	-	-	200	200	-	1,300
<i>Induced</i>	100	300	500	-	-	300	200	-	1,500
Total	800	1,400	2,500	300	300	2,200	1,000	-	8,500
<i>Multiplier</i>	1.33	1.75	1.67	1.50	1.50	1.38	1.67	-	1.52
Impact: Labour Income									
<i>Direct</i>	\$ 36,400,000	\$ 56,100,000	\$ 106,000,000	\$ 12,700,000	\$ 14,200,000	\$ 104,800,000	\$ 46,900,000	\$ 200,000	\$ 377,300,000
<i>Indirect</i>	\$ 7,400,000	\$ 18,500,000	\$ 39,200,000	\$ 3,000,000	\$ 2,700,000	\$ 21,800,000	\$ 13,100,000	\$ 100,000	\$ 105,800,000
<i>Induced</i>	\$ 7,200,000	\$ 17,500,000	\$ 40,700,000	\$ 3,200,000	\$ 2,900,000	\$ 23,100,000	\$ 14,100,000	\$ 100,000	\$ 109,000,000
Total	\$ 51,000,000	\$ 92,100,000	\$ 185,900,000	\$ 19,000,000	\$ 19,800,000	\$ 149,700,000	\$ 74,100,000	\$ 400,000	\$ 592,000,000
Impact: Total Taxes									
<i>Federal</i>	\$ 3,500,000	\$ 6,400,000	\$ 12,300,000	\$ 1,400,000	\$ 1,900,000	\$ 10,000,000	\$ 4,900,000	\$ -	\$ 40,400,000
<i>Provincial</i>	\$ 5,700,000	\$ 11,400,000	\$ 15,800,000	\$ 2,200,000	\$ 2,600,000	\$ 8,500,000	\$ 7,500,000	\$ -	\$ 53,700,000
<i>Local</i>	\$ 2,200,000	\$ 4,500,000	\$ 9,500,000	\$ 1,000,000	\$ 500,000	\$ 5,800,000	\$ 2,700,000	\$ -	\$ 26,300,000
Total	\$ 11,400,000	\$ 22,300,000	\$ 37,600,000	\$ 4,600,000	\$ 5,000,000	\$ 24,300,000	\$ 15,100,000	\$ 100,000	\$ 120,300,000

Note: Totals may not add due to rounding.

NON-TRAVEL RELATED RV IMPACTS

Non-Travel Related RV Expenditures

	ATLANTIC	QUEBEC	ONTARIO	MANITOBA	SASKATCHEWAN	ALBERTA	BRITISH COLUMBIA	TERRITORIES	CANADA
Initial Expenditure	\$ 184,400,000	\$ 561,800,000	\$ 1,010,900,000	\$ 107,200,000	\$ 66,500,000	\$ 345,700,000	\$ 384,200,000	\$ 7,500,000	\$ 2,668,300,000
Impact: Gross Output									
<i>Direct</i>	\$ 122,300,000	\$ 482,600,000	\$ 777,800,000	\$ 83,600,000	\$ 39,500,000	\$ 250,900,000	\$ 228,200,000	\$ 6,700,000	\$ 1,991,600,000
<i>Indirect</i>	\$ 61,100,000	\$ 279,400,000	\$ 541,600,000	\$ 45,700,000	\$ 25,800,000	\$ 158,600,000	\$ 145,300,000	\$ 2,600,000	\$ 1,260,000,000
<i>Induced</i>	\$ 40,000,000	\$ 166,800,000	\$ 387,500,000	\$ 28,800,000	\$ 17,700,000	\$ 113,400,000	\$ 115,000,000	\$ 1,700,000	\$ 870,900,000
Total	\$ 223,400,000	\$ 928,800,000	\$ 1,706,900,000	\$ 158,100,000	\$ 83,000,000	\$ 522,900,000	\$ 488,500,000	\$ 10,900,000	\$ 4,122,500,000
<i>Multiplier</i>	1.83	1.92	2.19	1.89	2.10	2.08	2.14	1.63	2.07
Impact: Value Added									
<i>Direct</i>	\$ 67,300,000	\$ 241,900,000	\$ 399,400,000	\$ 41,000,000	\$ 20,600,000	\$ 139,000,000	\$ 120,700,000	\$ 3,400,000	\$ 1,033,300,000
<i>Indirect</i>	\$ 34,200,000	\$ 149,400,000	\$ 307,100,000	\$ 25,600,000	\$ 13,700,000	\$ 85,500,000	\$ 83,000,000	\$ 1,400,000	\$ 699,900,000
<i>Induced</i>	\$ 23,700,000	\$ 95,400,000	\$ 224,200,000	\$ 17,200,000	\$ 10,000,000	\$ 66,100,000	\$ 72,200,000	\$ 1,100,000	\$ 509,800,000
Total	\$ 125,100,000	\$ 486,800,000	\$ 930,700,000	\$ 83,700,000	\$ 44,200,000	\$ 290,600,000	\$ 275,900,000	\$ 5,900,000	\$ 2,243,000,000
<i>Multiplier</i>	1.86	2.01	2.33	2.04	2.15	2.09	2.29	1.74	2.17
Impact: Employment (Full-Time, Full-Year Employment)									
<i>Direct</i>	700	2,200	3,500	300	200	1,300	1,100	-	9,300
<i>Indirect</i>	300	1,200	2,200	200	100	600	700	-	5,100
<i>Induced</i>	200	700	1,500	100	100	400	500	-	3,400
Total	1,100	4,100	7,100	600	300	2,200	2,200	-	17,800
<i>Multiplier</i>	1.57	1.86	2.03	2.00	1.50	1.69	2.00	-	1.91
Impact: Labour Income									
<i>Direct</i>	\$ 39,300,000	\$ 140,000,000	\$ 256,700,000	\$ 21,800,000	\$ 12,500,000	\$ 90,500,000	\$ 88,200,000	\$ 2,100,000	\$ 651,000,000
<i>Indirect</i>	\$ 20,700,000	\$ 94,100,000	\$ 197,100,000	\$ 15,600,000	\$ 7,100,000	\$ 49,200,000	\$ 54,300,000	\$ 800,000	\$ 438,900,000
<i>Induced</i>	\$ 10,400,000	\$ 46,900,000	\$ 108,300,000	\$ 7,200,000	\$ 3,800,000	\$ 28,100,000	\$ 30,700,000	\$ 400,000	\$ 235,700,000
Total	\$ 70,500,000	\$ 281,000,000	\$ 562,100,000	\$ 44,600,000	\$ 23,400,000	\$ 167,700,000	\$ 173,100,000	\$ 3,300,000	\$ 1,325,600,000
Impact: Total Taxes									
<i>Federal</i>	\$ 28,100,000	\$ 78,000,000	\$ 209,500,000	\$ 17,700,000	\$ 10,000,000	\$ 64,700,000	\$ 64,800,000	\$ 1,000,000	\$ 473,700,000
<i>Provincial</i>	\$ 36,500,000	\$ 166,600,000	\$ 177,100,000	\$ 16,300,000	\$ 15,600,000	\$ 29,200,000	\$ 50,800,000	\$ 500,000	\$ 492,500,000
<i>Local</i>	\$ 7,100,000	\$ 19,200,000	\$ 48,800,000	\$ 4,100,000	\$ 1,000,000	\$ 12,000,000	\$ 12,600,000	\$ 200,000	\$ 104,900,000
Total	\$ 71,700,000	\$ 263,800,000	\$ 435,400,000	\$ 38,000,000	\$ 26,700,000	\$ 105,800,000	\$ 128,200,000	\$ 1,700,000	\$ 1,071,200,000

Note: Totals may not add due to rounding.

TOURISM RELATED RV IMPACTS

Tourism-Related RV Expenditures

	ATLANTIC	QUEBEC	ONTARIO	MANITOBA	SASKATCHEWAN	ALBERTA	BRITISH COLUMBIA	TERRITORIES	CANADA
Initial Expenditure	\$ 624,000,000	\$ 2,790,200,000	\$ 3,634,800,000	\$ 295,900,000	\$ 364,800,000	\$ 1,242,400,000	\$ 1,317,300,000	\$ 29,100,000	\$ 10,298,500,000
Impact: Gross Output									
<i>Direct</i>	\$ 497,700,000	\$ 1,785,800,000	\$ 2,231,700,000	\$ 241,500,000	\$ 213,000,000	\$ 1,166,700,000	\$ 749,600,000	\$ 33,300,000	\$ 6,919,300,000
<i>Indirect</i>	\$ 245,700,000	\$ 1,027,900,000	\$ 1,595,400,000	\$ 147,300,000	\$ 146,400,000	\$ 859,900,000	\$ 438,900,000	\$ 13,600,000	\$ 4,475,100,000
<i>Induced</i>	\$ 149,800,000	\$ 608,700,000	\$ 1,097,000,000	\$ 84,600,000	\$ 71,200,000	\$ 419,800,000	\$ 325,800,000	\$ 7,200,000	\$ 2,764,200,000
Total	\$ 893,300,000	\$ 3,422,400,000	\$ 4,924,100,000	\$ 473,400,000	\$ 430,600,000	\$ 2,446,300,000	\$ 1,514,300,000	\$ 54,200,000	\$ 14,158,600,000
<i>Multiplier</i>	1.79	1.92	2.21	1.96	2.02	2.10	2.02	1.63	2.05
Impact: Value Added									
<i>Direct</i>	\$ 238,700,000	\$ 1,095,500,000	\$ 1,231,300,000	\$ 109,000,000	\$ 151,800,000	\$ 632,100,000	\$ 545,700,000	\$ 20,400,000	\$ 4,024,500,000
<i>Indirect</i>	\$ 123,900,000	\$ 598,500,000	\$ 875,500,000	\$ 78,800,000	\$ 103,400,000	\$ 587,000,000	\$ 288,200,000	\$ 9,400,000	\$ 2,664,700,000
<i>Induced</i>	\$ 88,100,000	\$ 399,700,000	\$ 648,700,000	\$ 48,000,000	\$ 51,300,000	\$ 270,800,000	\$ 239,400,000	\$ 5,500,000	\$ 1,751,500,000
Total	\$ 450,700,000	\$ 2,093,600,000	\$ 2,755,600,000	\$ 235,800,000	\$ 306,500,000	\$ 1,489,900,000	\$ 1,073,300,000	\$ 35,200,000	\$ 8,440,700,000
<i>Multiplier</i>	1.89	1.91	2.24	2.16	2.02	2.36	1.97	1.73	2.10
Impact: Employment (Full-Time, Full-Year Employment)									
<i>Direct</i>	3,400	13,900	12,500	1,400	1,600	5,600	6,000	200	44,600
<i>Indirect</i>	1,000	4,900	6,400	500	500	2,800	2,200	-	18,200
<i>Induced</i>	600	3,000	4,300	300	300	1,500	1,500	-	11,600
Total	5,100	21,800	23,100	2,200	2,400	10,000	9,600	300	74,400
<i>Multiplier</i>	1.50	1.57	1.85	1.57	1.50	1.79	1.60	1.50	1.67
Impact: Labour Income									
<i>Direct</i>	\$ 154,500,000	\$ 653,600,000	\$ 727,300,000	\$ 62,400,000	\$ 81,000,000	\$ 338,600,000	\$ 316,900,000	\$ 12,400,000	\$ 2,346,700,000
<i>Indirect</i>	\$ 70,400,000	\$ 349,300,000	\$ 522,000,000	\$ 37,500,000	\$ 37,200,000	\$ 272,000,000	\$ 166,100,000	\$ 4,600,000	\$ 1,459,000,000
<i>Induced</i>	\$ 38,400,000	\$ 195,900,000	\$ 317,400,000	\$ 20,200,000	\$ 19,500,000	\$ 114,300,000	\$ 101,600,000	\$ 2,100,000	\$ 809,400,000
Total	\$ 263,300,000	\$ 1,198,800,000	\$ 1,566,700,000	\$ 120,100,000	\$ 137,800,000	\$ 724,900,000	\$ 584,600,000	\$ 19,000,000	\$ 4,615,100,000
Impact: Total Taxes									
<i>Federal</i>	\$ 122,400,000	\$ 407,800,000	\$ 714,900,000	\$ 59,400,000	\$ 72,100,000	\$ 330,100,000	\$ 264,000,000	\$ 6,400,000	\$ 1,977,100,000
<i>Provincial</i>	\$ 154,000,000	\$ 692,100,000	\$ 659,500,000	\$ 53,700,000	\$ 64,500,000	\$ 182,900,000	\$ 213,500,000	\$ 3,700,000	\$ 2,023,700,000
<i>Local</i>	\$ 7,400,000	\$ 55,300,000	\$ 78,700,000	\$ 4,700,000	\$ 4,000,000	\$ 25,400,000	\$ 24,200,000	\$ 400,000	\$ 200,100,000
Total	\$ 283,900,000	\$ 1,155,300,000	\$ 1,453,000,000	\$ 117,700,000	\$ 140,500,000	\$ 538,400,000	\$ 501,600,000	\$ 10,500,000	\$ 4,201,000,000

Note: Totals may not add due to rounding.

TOTAL AGGREGATE RV INDUSTRY IMPACT

RV SUBTOTAL

	ATLANTIC	QUEBEC	ONTARIO	MANITOBA	SASKATCHEWAN	ALBERTA	BRITISH COLUMBIA	TERRITORIES	CANADA
Initial Expenditure	\$ 881,400,000	\$ 3,623,800,000	\$ 4,868,400,000	\$ 640,300,000	\$ 613,700,000	\$ 1,791,000,000	\$ 1,839,300,000	\$ 37,000,000	\$ 14,294,900,000
Impact: Gross Output									
<i>Direct</i>	\$ 693,000,000	\$ 2,540,200,000	\$ 3,232,200,000	\$ 562,300,000	\$ 434,900,000	\$ 1,620,500,000	\$ 1,115,600,000	\$ 40,400,000	\$ 10,239,000,000
<i>Indirect</i>	\$ 332,600,000	\$ 1,418,700,000	\$ 2,338,800,000	\$ 257,500,000	\$ 210,600,000	\$ 1,114,600,000	\$ 642,900,000	\$ 16,600,000	\$ 6,332,100,000
<i>Induced</i>	\$ 219,900,000	\$ 865,800,000	\$ 1,669,900,000	\$ 162,300,000	\$ 125,300,000	\$ 639,500,000	\$ 512,700,000	\$ 9,400,000	\$ 4,204,900,000
Total	\$ 1,245,600,000	\$ 4,824,700,000	\$ 7,240,800,000	\$ 982,200,000	\$ 770,700,000	\$ 3,374,400,000	\$ 2,271,200,000	\$ 66,500,000	\$ 20,776,100,000
Multiplier	1.80	1.90	2.24	1.75	1.77	2.08	2.04	1.65	2.03
Impact: Value Added									
<i>Direct</i>	\$ 352,500,000	\$ 1,450,200,000	\$ 1,757,200,000	\$ 227,900,000	\$ 234,300,000	\$ 905,800,000	\$ 739,300,000	\$ 24,100,000	\$ 5,691,400,000
<i>Indirect</i>	\$ 171,900,000	\$ 803,400,000	\$ 1,282,100,000	\$ 136,500,000	\$ 135,400,000	\$ 724,700,000	\$ 403,300,000	\$ 11,100,000	\$ 3,668,300,000
<i>Induced</i>	\$ 129,900,000	\$ 546,000,000	\$ 978,200,000	\$ 96,400,000	\$ 83,800,000	\$ 399,500,000	\$ 356,300,000	\$ 6,900,000	\$ 2,596,900,000
Total	\$ 654,200,000	\$ 2,799,600,000	\$ 4,017,500,000	\$ 460,700,000	\$ 453,400,000	\$ 2,030,000,000	\$ 1,499,000,000	\$ 41,900,000	\$ 11,956,600,000
Multiplier	1.86	1.93	2.29	2.02	1.94	2.24	2.03	1.74	2.10
Impact: Employment (Full-Time, Full-Year Employment)									
<i>Direct</i>	4,700	17,200	17,600	2,600	2,600	8,500	7,900	200	61,500
<i>Indirect</i>	1,400	6,500	9,300	900	700	3,700	3,200	-	25,500
<i>Induced</i>	900	4,100	6,500	500	500	2,200	2,300	-	17,100
Total	7,000	27,900	33,200	4,200	3,700	14,500	13,200	300	104,200
Multiplier	1.49	1.62	1.89	1.62	1.42	1.71	1.67	1.50	1.69
Impact: Labour Income									
<i>Direct</i>	\$ 230,900,000	\$ 873,900,000	\$ 1,099,700,000	\$ 146,300,000	\$ 141,600,000	\$ 534,700,000	\$ 468,500,000	\$ 14,700,000	\$ 3,510,200,000
<i>Indirect</i>	\$ 99,300,000	\$ 477,500,000	\$ 779,600,000	\$ 71,300,000	\$ 54,200,000	\$ 348,600,000	\$ 239,600,000	\$ 5,500,000	\$ 2,075,600,000
<i>Induced</i>	\$ 56,600,000	\$ 268,000,000	\$ 478,000,000	\$ 39,800,000	\$ 31,800,000	\$ 168,900,000	\$ 151,500,000	\$ 2,600,000	\$ 1,197,300,000
Total	\$ 386,900,000	\$ 1,619,400,000	\$ 2,357,300,000	\$ 257,600,000	\$ 227,700,000	\$ 1,052,000,000	\$ 859,500,000	\$ 22,800,000	\$ 6,783,000,000
Impact: Total Taxes									
<i>Federal</i>	\$ 154,700,000	\$ 501,400,000	\$ 949,500,000	\$ 100,600,000	\$ 98,500,000	\$ 407,900,000	\$ 341,800,000	\$ 7,400,000	\$ 2,561,800,000
<i>Provincial</i>	\$ 196,700,000	\$ 883,000,000	\$ 860,800,000	\$ 88,000,000	\$ 95,100,000	\$ 222,200,000	\$ 276,700,000	\$ 4,200,000	\$ 2,626,400,000
<i>Local</i>	\$ 16,800,000	\$ 80,900,000	\$ 139,100,000	\$ 12,400,000	\$ 6,200,000	\$ 43,700,000	\$ 40,200,000	\$ 600,000	\$ 339,800,000
Total	\$ 368,300,000	\$ 1,465,400,000	\$ 1,949,300,000	\$ 200,800,000	\$ 199,900,000	\$ 673,700,000	\$ 658,600,000	\$ 12,300,000	\$ 5,528,100,000

Note: Totals may not add due to rounding.

NON-TRAVEL RELATED CAMPING IMPACTS

Non-Travel Related Camping Expenditures

	ATLANTIC	QUEBEC	ONTARIO	MANITOBA	SASKATCHEWAN	ALBERTA	BRITISH COLUMBIA	TERRITORIES	CANADA
Initial Expenditure	\$ 151,700,000	\$ 571,300,000	\$ 986,600,000	\$ 68,300,000	\$ 53,200,000	\$ 256,400,000	\$ 291,800,000	\$ 6,700,000	\$ 2,386,100,000
Impact: Gross Output									
Direct	\$ 79,800,000	\$ 333,100,000	\$ 606,800,000	\$ 41,200,000	\$ 28,600,000	\$ 175,000,000	\$ 152,400,000	\$ 4,600,000	\$ 1,421,600,000
Indirect	\$ 40,700,000	\$ 176,600,000	\$ 371,500,000	\$ 23,400,000	\$ 19,000,000	\$ 110,800,000	\$ 79,000,000	\$ 1,300,000	\$ 822,300,000
Induced	\$ 29,300,000	\$ 128,600,000	\$ 305,400,000	\$ 16,900,000	\$ 13,200,000	\$ 80,800,000	\$ 81,100,000	\$ 2,000,000	\$ 657,300,000
Total	\$ 149,800,000	\$ 638,200,000	\$ 1,283,700,000	\$ 81,500,000	\$ 60,900,000	\$ 366,700,000	\$ 312,500,000	\$ 7,900,000	\$ 2,901,200,000
Multiplier	1.88	1.92	2.12	1.98	2.13	2.10	2.05	1.72	2.04
Impact: Value Added									
Direct	\$ 44,800,000	\$ 184,500,000	\$ 316,600,000	\$ 21,600,000	\$ 15,100,000	\$ 103,200,000	\$ 87,300,000	\$ 1,600,000	\$ 774,800,000
Indirect	\$ 20,600,000	\$ 89,900,000	\$ 193,500,000	\$ 12,100,000	\$ 9,500,000	\$ 55,800,000	\$ 42,700,000	\$ 700,000	\$ 424,600,000
Induced	\$ 17,200,000	\$ 73,300,000	\$ 177,000,000	\$ 9,900,000	\$ 7,400,000	\$ 47,100,000	\$ 51,100,000	\$ 1,100,000	\$ 384,200,000
Total	\$ 82,600,000	\$ 347,700,000	\$ 687,100,000	\$ 43,600,000	\$ 32,000,000	\$ 206,100,000	\$ 181,200,000	\$ 3,400,000	\$ 1,583,600,000
Multiplier	1.84	1.88	2.17	2.02	2.12	2.00	2.08	2.13	2.04
Impact: Employment (Full-Time, Full-Year Employment)									
Direct	500	1,800	3,400	200	100	1,100	1,000	-	8,200
Indirect	200	700	1,400	100	100	300	300	-	3,100
Induced	100	600	1,200	100	-	300	300	-	2,500
Total	800	3,100	6,000	400	200	1,700	1,700	-	13,900
Multiplier	1.60	1.72	1.76	2.00	2.00	1.55	1.70	-	1.70
Impact: Labour Income									
Direct	\$ 28,800,000	\$ 120,200,000	\$ 238,900,000	\$ 13,100,000	\$ 9,700,000	\$ 70,400,000	\$ 76,200,000	\$ 1,100,000	\$ 558,500,000
Indirect	\$ 12,300,000	\$ 55,200,000	\$ 119,900,000	\$ 6,900,000	\$ 4,300,000	\$ 28,700,000	\$ 25,400,000	\$ 400,000	\$ 253,100,000
Induced	\$ 7,600,000	\$ 36,100,000	\$ 85,300,000	\$ 4,200,000	\$ 2,800,000	\$ 20,000,000	\$ 21,600,000	\$ 600,000	\$ 178,200,000
Total	\$ 48,700,000	\$ 211,500,000	\$ 444,200,000	\$ 24,200,000	\$ 16,900,000	\$ 119,100,000	\$ 123,200,000	\$ 2,000,000	\$ 989,800,000
Impact: Total Taxes									
Federal	\$ 21,300,000	\$ 68,200,000	\$ 177,500,000	\$ 10,800,000	\$ 8,100,000	\$ 49,600,000	\$ 50,200,000	\$ 1,200,000	\$ 386,800,000
Provincial	\$ 27,200,000	\$ 119,400,000	\$ 157,400,000	\$ 9,900,000	\$ 8,400,000	\$ 20,900,000	\$ 37,600,000	\$ 300,000	\$ 380,900,000
Local	\$ 4,100,000	\$ 11,500,000	\$ 28,200,000	\$ 1,700,000	\$ 500,000	\$ 8,600,000	\$ 5,100,000	\$ 300,000	\$ 59,800,000
Total	\$ 52,600,000	\$ 199,100,000	\$ 363,000,000	\$ 22,300,000	\$ 17,000,000	\$ 79,000,000	\$ 92,900,000	\$ 1,700,000	\$ 827,600,000

Note: Totals may not add due to rounding.

TOURISM RELATED CAMPING IMPACTS

Tourism Related Camping Expenditures

	ATLANTIC	QUEBEC	ONTARIO	MANITOBA	SASKATCHEWAN	ALBERTA	BRITISH COLUMBIA	TERRITORIES	CANADA
Initial Expenditure	\$ 709,200,000	\$ 2,109,600,000	\$ 3,456,800,000	\$ 386,700,000	\$ 332,700,000	\$ 1,540,700,000	\$ 1,251,600,000	\$ 27,700,000	\$ 9,815,000,000
Impact: Gross Output									
<i>Direct</i>	\$ 551,100,000	\$ 1,698,600,000	\$ 2,164,400,000	\$ 269,500,000	\$ 255,100,000	\$ 1,632,600,000	\$ 956,700,000	\$ 42,000,000	\$ 7,570,000,000
<i>Indirect</i>	\$ 270,900,000	\$ 974,500,000	\$ 1,574,800,000	\$ 174,300,000	\$ 177,900,000	\$ 1,260,900,000	\$ 531,800,000	\$ 17,500,000	\$ 4,982,700,000
<i>Induced</i>	\$ 160,400,000	\$ 574,300,000	\$ 1,054,300,000	\$ 95,400,000	\$ 76,700,000	\$ 536,800,000	\$ 377,600,000	\$ 8,600,000	\$ 2,884,100,000
Total	\$ 982,300,000	\$ 3,247,500,000	\$ 4,793,500,000	\$ 539,300,000	\$ 509,600,000	\$ 3,430,300,000	\$ 1,866,100,000	\$ 68,100,000	\$ 15,436,800,000
<i>Multiplier</i>	1.78	1.91	2.21	2.00	2.00	2.10	1.95	1.62	2.04
Impact: Value Added									
<i>Direct</i>	\$ 270,500,000	\$ 890,100,000	\$ 1,091,600,000	\$ 139,400,000	\$ 132,300,000	\$ 790,100,000	\$ 535,300,000	\$ 22,100,000	\$ 3,871,500,000
<i>Indirect</i>	\$ 135,000,000	\$ 506,900,000	\$ 817,600,000	\$ 90,100,000	\$ 97,700,000	\$ 685,800,000	\$ 291,800,000	\$ 9,800,000	\$ 2,634,700,000
<i>Induced</i>	\$ 95,800,000	\$ 334,900,000	\$ 607,000,000	\$ 56,700,000	\$ 46,300,000	\$ 325,400,000	\$ 243,500,000	\$ 5,700,000	\$ 1,715,300,000
Total	\$ 501,300,000	\$ 1,731,900,000	\$ 2,516,200,000	\$ 286,300,000	\$ 276,200,000	\$ 1,801,200,000	\$ 1,070,700,000	\$ 37,700,000	\$ 8,221,500,000
<i>Multiplier</i>	1.85	1.95	2.31	2.05	2.09	2.28	2.00	1.71	2.12
Impact: Employment (Full-Time, Full-Year Employment)									
<i>Direct</i>	4,000	11,800	11,800	1,800	1,400	7,000	5,900	200	43,700
<i>Indirect</i>	1,100	4,100	5,900	600	400	3,300	2,200	-	17,600
<i>Induced</i>	700	2,500	4,000	400	300	1,800	1,500	-	11,200
Total	5,800	18,300	21,600	2,700	2,100	12,100	9,600	300	72,600
<i>Multiplier</i>	1.45	1.55	1.83	1.50	1.50	1.73	1.63	1.50	1.66
Impact: Labour Income									
<i>Direct</i>	\$ 176,800,000	\$ 533,300,000	\$ 663,700,000	\$ 80,000,000	\$ 70,700,000	\$ 425,300,000	\$ 315,000,000	\$ 13,100,000	\$ 2,277,900,000
<i>Indirect</i>	\$ 76,400,000	\$ 294,700,000	\$ 485,400,000	\$ 43,600,000	\$ 35,000,000	\$ 321,200,000	\$ 167,200,000	\$ 4,800,000	\$ 1,428,300,000
<i>Induced</i>	\$ 41,500,000	\$ 164,400,000	\$ 297,800,000	\$ 23,600,000	\$ 17,600,000	\$ 137,000,000	\$ 104,000,000	\$ 2,200,000	\$ 788,200,000
Total	\$ 294,700,000	\$ 992,400,000	\$ 1,446,900,000	\$ 147,200,000	\$ 123,300,000	\$ 883,500,000	\$ 586,200,000	\$ 20,200,000	\$ 4,494,400,000
Impact: Total Taxes									
<i>Federal</i>	\$ 136,800,000	\$ 334,000,000	\$ 663,600,000	\$ 74,400,000	\$ 67,000,000	\$ 402,100,000	\$ 262,000,000	\$ 6,700,000	\$ 1,946,600,000
<i>Provincial</i>	\$ 172,300,000	\$ 561,300,000	\$ 611,700,000	\$ 67,400,000	\$ 59,500,000	\$ 220,800,000	\$ 204,400,000	\$ 3,800,000	\$ 1,901,100,000
<i>Local</i>	\$ 5,600,000	\$ 37,400,000	\$ 58,000,000	\$ 3,700,000	\$ 2,800,000	\$ 22,400,000	\$ 19,600,000	\$ 300,000	\$ 149,800,000
Total	\$ 314,700,000	\$ 932,700,000	\$ 1,333,300,000	\$ 145,500,000	\$ 129,400,000	\$ 645,300,000	\$ 486,000,000	\$ 10,800,000	\$ 3,997,600,000

Note: Totals may not add due to rounding.

CAMPGROUND ACCOMMODATIONS REVENUE – CONSERVATIVE OUTPUTS

Notes: Campground accommodations revenue is a sub-component of tourism-related camping expenditures. Quebec is excluded in its entirety, though we note that some “indirect” and “induced” benefits are captured in the Province as a function of campground fees generated in other provinces/territories. Results for Canada-wide impacts will vary depending on the preferred inclusion/exclusion of these impacts.

CAMPGROUND ACCOMMODATIONS REVENUE – AGGRESSIVE OUTPUTS

Notes: Campground accommodations revenue is a sub-component of tourism-related camping expenditures. Quebec is excluded in its entirety, though we note that some “indirect” and “induced” benefits are captured in the province as a function of campground fees generated in other provinces/territories. Results for Canada-wide impacts will vary depending on the preferred inclusion/exclusion of these impacts.

TOTAL AGGREGATE CAMPING INDUSTRY IMPACT

CAMPING SUBTOTAL

	ATLANTIC	QUEBEC	ONTARIO	MANITOBA	SASKATCHEWAN	ALBERTA	BRITISH COLUMBIA	TERRITORIES	CANADA
Initial Expenditure	\$ 860,900,000	\$ 2,680,900,000	\$ 4,443,400,000	\$ 455,000,000	\$ 385,900,000	\$ 1,797,100,000	\$ 1,543,400,000	\$ 34,400,000	\$ 12,201,100,000
Impact: Gross Output									
Direct	\$ 630,900,000	\$ 2,031,700,000	\$ 2,771,200,000	\$ 310,700,000	\$ 283,700,000	\$ 1,807,600,000	\$ 1,109,100,000	\$ 46,600,000	\$ 8,991,600,000
Indirect	\$ 311,600,000	\$ 1,151,100,000	\$ 1,946,300,000	\$ 197,700,000	\$ 196,900,000	\$ 1,371,700,000	\$ 610,800,000	\$ 18,800,000	\$ 5,805,000,000
Induced	\$ 189,700,000	\$ 702,900,000	\$ 1,359,700,000	\$ 112,300,000	\$ 89,900,000	\$ 617,600,000	\$ 458,700,000	\$ 10,600,000	\$ 3,541,400,000
Total	\$ 1,132,100,000	\$ 3,885,700,000	\$ 6,077,200,000	\$ 620,800,000	\$ 570,500,000	\$ 3,797,000,000	\$ 2,178,600,000	\$ 76,000,000	\$ 18,338,000,000
Multiplier	1.79	1.91	2.19	2.00	2.01	2.10	1.96	1.63	2.04
Impact: Value Added									
Direct	\$ 315,300,000	\$ 1,074,600,000	\$ 1,408,200,000	\$ 161,000,000	\$ 147,400,000	\$ 893,300,000	\$ 622,600,000	\$ 23,700,000	\$ 4,646,300,000
Indirect	\$ 155,600,000	\$ 596,800,000	\$ 1,011,100,000	\$ 102,200,000	\$ 107,200,000	\$ 741,600,000	\$ 334,500,000	\$ 10,500,000	\$ 3,059,300,000
Induced	\$ 113,000,000	\$ 408,200,000	\$ 784,000,000	\$ 66,600,000	\$ 53,700,000	\$ 372,500,000	\$ 294,600,000	\$ 6,800,000	\$ 2,099,500,000
Total	\$ 583,900,000	\$ 2,079,600,000	\$ 3,203,300,000	\$ 329,900,000	\$ 308,200,000	\$ 2,007,300,000	\$ 1,251,900,000	\$ 41,100,000	\$ 9,805,100,000
Multiplier	1.85	1.94	2.27	2.05	2.09	2.25	2.01	1.73	2.11
Impact: Employment (Full-Time, Full-Year Employment)									
Direct	4,500	13,600	15,200	2,000	1,500	8,100	6,900	200	51,900
Indirect	1,300	4,800	7,300	700	500	3,600	2,500	-	20,700
Induced	800	3,100	5,200	500	300	2,100	1,800	-	13,700
Total	6,600	21,400	27,600	3,100	2,300	13,800	11,300	300	86,500
Multiplier	1.47	1.57	1.82	1.55	1.53	1.70	1.64	1.50	1.67
Impact: Labour Income									
Direct	\$ 205,600,000	\$ 653,500,000	\$ 902,600,000	\$ 93,100,000	\$ 80,400,000	\$ 495,700,000	\$ 391,200,000	\$ 14,200,000	\$ 2,836,400,000
Indirect	\$ 88,700,000	\$ 349,900,000	\$ 605,300,000	\$ 50,500,000	\$ 39,300,000	\$ 349,900,000	\$ 192,600,000	\$ 5,200,000	\$ 1,681,400,000
Induced	\$ 49,100,000	\$ 200,500,000	\$ 383,100,000	\$ 27,800,000	\$ 20,400,000	\$ 157,000,000	\$ 125,600,000	\$ 2,800,000	\$ 966,400,000
Total	\$ 343,400,000	\$ 1,203,900,000	\$ 1,891,100,000	\$ 171,400,000	\$ 140,200,000	\$ 1,002,600,000	\$ 709,400,000	\$ 22,200,000	\$ 5,484,200,000
Impact: Total Taxes									
Federal	\$ 158,100,000	\$ 402,200,000	\$ 841,100,000	\$ 85,200,000	\$ 75,100,000	\$ 451,700,000	\$ 312,200,000	\$ 7,900,000	\$ 2,333,400,000
Provincial	\$ 199,500,000	\$ 680,700,000	\$ 769,100,000	\$ 77,300,000	\$ 67,900,000	\$ 241,700,000	\$ 242,000,000	\$ 4,100,000	\$ 2,282,000,000
Local	\$ 9,700,000	\$ 48,900,000	\$ 86,200,000	\$ 5,400,000	\$ 3,300,000	\$ 31,000,000	\$ 24,700,000	\$ 600,000	\$ 209,600,000
Total	\$ 367,300,000	\$ 1,131,800,000	\$ 1,696,300,000	\$ 167,800,000	\$ 146,400,000	\$ 724,300,000	\$ 578,900,000	\$ 12,500,000	\$ 4,825,200,000

Note: Totals may not add due to rounding.

TOTAL AGGREGATE RV AND CAMPING INDUSTRY IMPACT

GRAND TOTAL (excluding "shared" expenditures)

	ATLANTIC	QUEBEC	ONTARIO	MANITOBA	SASKATCHEWAN	ALBERTA	BRITISH COLUMBIA	TERRITORIES	CANADA
Initial Expenditure	\$ 1,215,100,000	\$ 4,729,400,000	\$ 6,854,500,000	\$ 854,400,000	\$ 763,500,000	\$ 2,664,500,000	\$ 2,661,900,000	\$ 52,500,000	\$ 19,795,700,000
Impact: Gross Output									
Direct	\$ 918,700,000	\$ 3,318,200,000	\$ 4,438,700,000	\$ 700,200,000	\$ 543,600,000	\$ 2,484,400,000	\$ 1,706,500,000	\$ 59,900,000	\$ 14,170,100,000
Indirect	\$ 444,600,000	\$ 1,849,900,000	\$ 3,154,100,000	\$ 345,500,000	\$ 286,000,000	\$ 1,767,400,000	\$ 962,300,000	\$ 24,600,000	\$ 8,834,100,000
Induced	\$ 290,000,000	\$ 1,143,900,000	\$ 2,264,800,000	\$ 213,700,000	\$ 161,100,000	\$ 938,100,000	\$ 762,300,000	\$ 13,600,000	\$ 5,787,500,000
Total	\$ 1,653,400,000	\$ 6,312,000,000	\$ 9,857,600,000	\$ 1,259,400,000	\$ 990,500,000	\$ 5,189,800,000	\$ 3,431,000,000	\$ 98,100,000	\$ 28,791,800,000
Multiplier	1.80	1.90	2.22	1.80	1.82	2.09	2.01	1.64	2.03
Impact: Value Added									
Direct	\$ 467,500,000	\$ 1,862,800,000	\$ 2,365,800,000	\$ 301,500,000	\$ 288,500,000	\$ 1,329,400,000	\$ 1,057,800,000	\$ 33,900,000	\$ 7,707,400,000
Indirect	\$ 226,900,000	\$ 1,022,300,000	\$ 1,696,700,000	\$ 181,400,000	\$ 174,500,000	\$ 1,054,800,000	\$ 572,300,000	\$ 15,400,000	\$ 4,944,100,000
Induced	\$ 171,700,000	\$ 705,000,000	\$ 1,320,200,000	\$ 127,100,000	\$ 104,400,000	\$ 576,000,000	\$ 512,800,000	\$ 9,600,000	\$ 3,526,500,000
Total	\$ 866,000,000	\$ 3,590,100,000	\$ 5,382,600,000	\$ 609,900,000	\$ 567,400,000	\$ 2,960,200,000	\$ 2,142,800,000	\$ 58,800,000	\$ 16,177,900,000
Multiplier	1.85	1.93	2.28	2.02	1.97	2.23	2.03	1.73	2.10
Impact: Employment (Full-Time, Full-Year Employment)									
Direct	6,300	22,300	24,400	3,500	3,100	12,400	11,500	300	84,000
Indirect	1,900	8,200	12,300	1,200	800	5,400	4,500	-	34,200
Induced	1,200	5,300	8,800	600	600	3,200	3,300	-	23,200
Total	9,400	35,900	45,200	5,600	4,600	21,100	19,000	400	141,400
Multiplier	1.49	1.61	1.85	1.60	1.48	1.70	1.65	1.33	1.68
Impact: Labour Income									
Direct	\$ 307,000,000	\$ 1,131,800,000	\$ 1,515,200,000	\$ 189,500,000	\$ 171,900,000	\$ 776,500,000	\$ 680,400,000	\$ 20,700,000	\$ 4,792,800,000
Indirect	\$ 130,700,000	\$ 606,300,000	\$ 1,027,500,000	\$ 93,700,000	\$ 68,700,000	\$ 505,600,000	\$ 336,900,000	\$ 7,700,000	\$ 2,777,200,000
Induced	\$ 74,800,000	\$ 346,200,000	\$ 644,700,000	\$ 52,600,000	\$ 39,700,000	\$ 243,300,000	\$ 218,200,000	\$ 3,600,000	\$ 1,623,100,000
Total	\$ 512,500,000	\$ 2,084,300,000	\$ 3,187,400,000	\$ 336,100,000	\$ 280,500,000	\$ 1,525,200,000	\$ 1,235,400,000	\$ 32,000,000	\$ 9,193,000,000
Impact: Total Taxes									
Federal	\$ 212,900,000	\$ 657,600,000	\$ 1,314,200,000	\$ 139,500,000	\$ 126,800,000	\$ 619,600,000	\$ 505,200,000	\$ 10,500,000	\$ 3,586,300,000
Provincial	\$ 270,100,000	\$ 1,143,700,000	\$ 1,194,000,000	\$ 123,300,000	\$ 120,100,000	\$ 332,300,000	\$ 401,800,000	\$ 5,900,000	\$ 3,590,800,000
Local	\$ 20,600,000	\$ 100,000,000	\$ 176,000,000	\$ 14,800,000	\$ 7,400,000	\$ 59,500,000	\$ 52,900,000	\$ 800,000	\$ 431,800,000
Total	\$ 503,700,000	\$ 1,901,400,000	\$ 2,684,100,000	\$ 277,600,000	\$ 254,300,000	\$ 1,011,200,000	\$ 959,700,000	\$ 17,300,000	\$ 7,609,100,000

Note: Totals may not add due to rounding.