



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

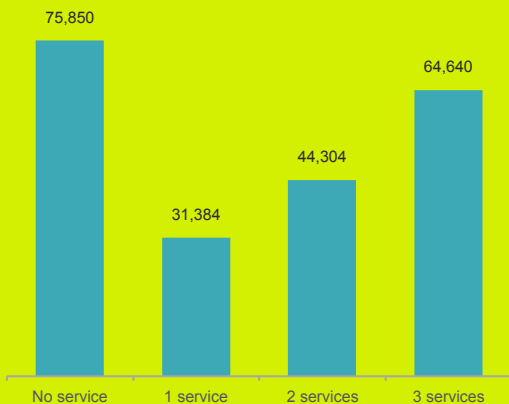


# PORTRAIT OF THE CANADIAN CAMPING INDUSTRY

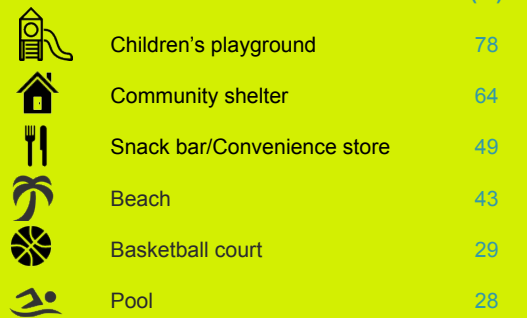
## CAMPGROUND MARKET



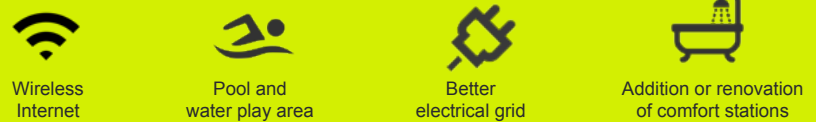
Total number of campsites  
by level of service for overnight campers



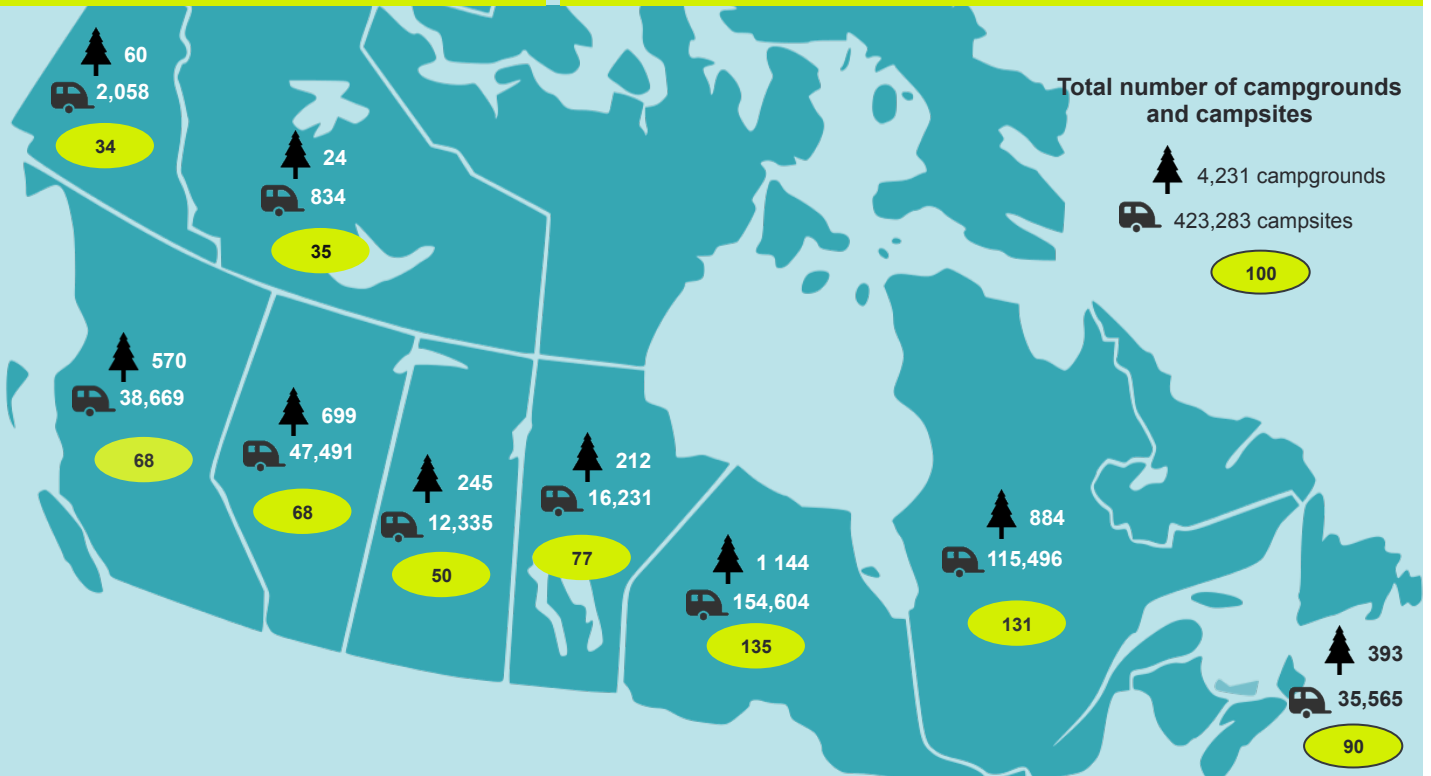
Most common infrastructure in  
campgrounds



Most requested new services in Canadian campgrounds



Total number of campgrounds  
and campsites



Campgrounds

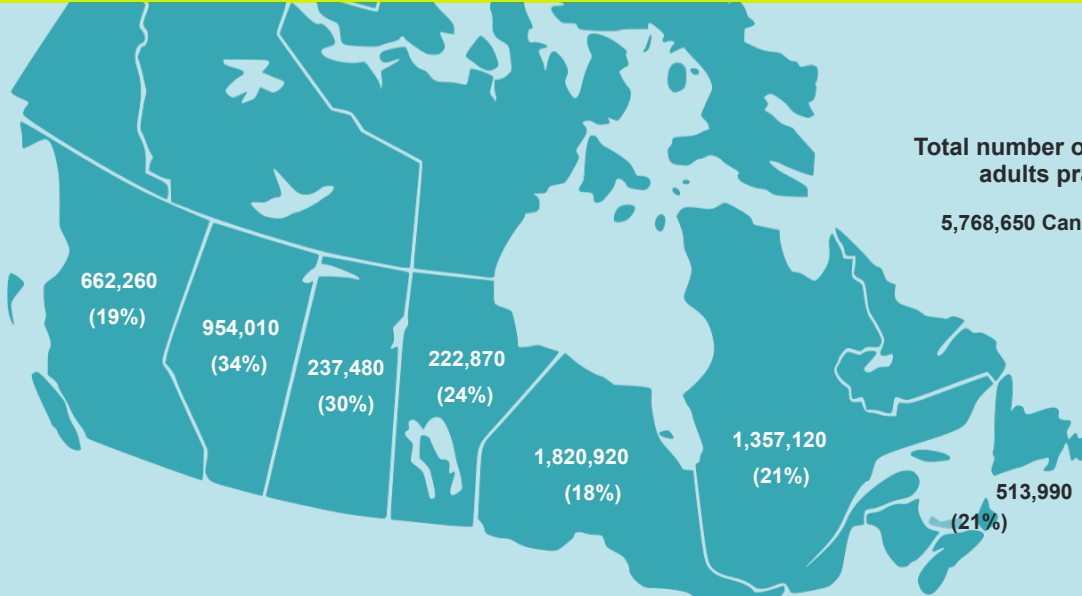


Campsites

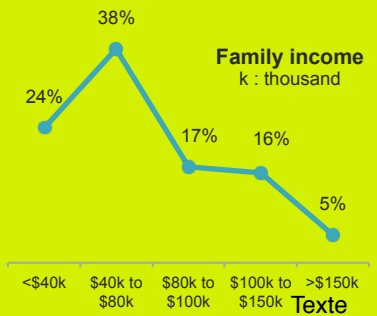
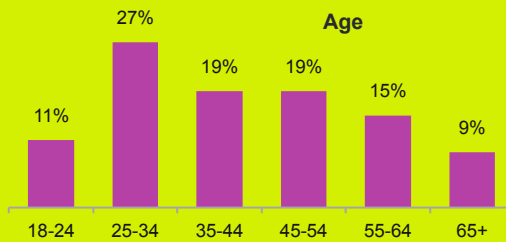
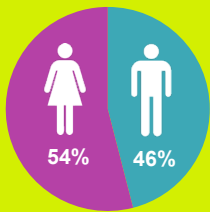


Average number of campsites per campground

# CAMPER MARKET



## Canadian camper profile



**4** camping trips per year on average

in

**3** different campgrounds on average

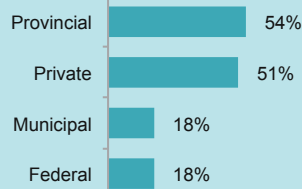
less than

**300** km from home (73%)

### Motivations to go camping

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

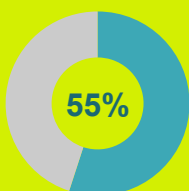
### Type of campground visited in 2014



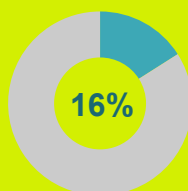
### Most popular camping activities



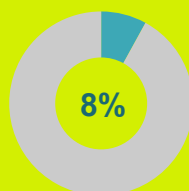
## Type of equipment mostly used in 2014 by Canadian campers



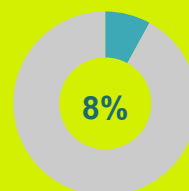
Tent



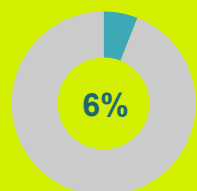
Trailer



Tent-trailer

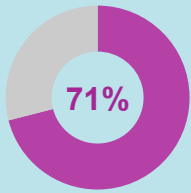


Fifth wheel

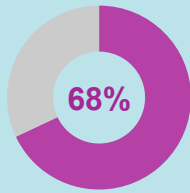


Motorhome

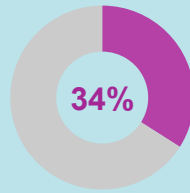
Services expected directly on the campsite by Canadian campers



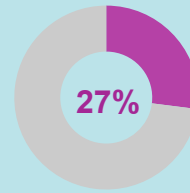
Drinkable water



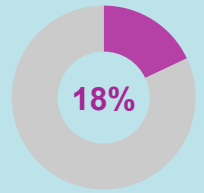
Electricity



Sewer



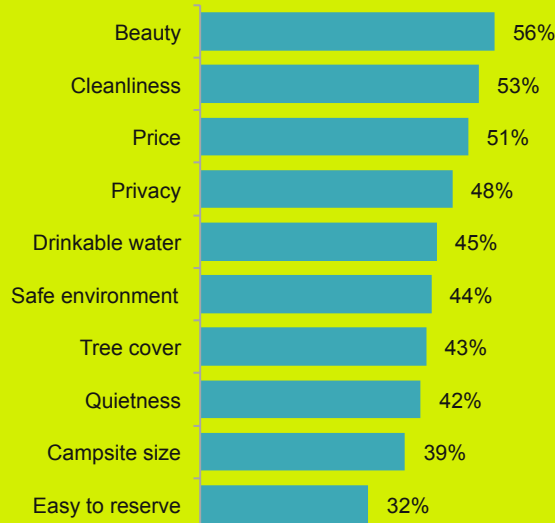
Wi-Fi



None

10 most important criteria used to select a campground

Canada



Preferred channels for reservation



Telephone

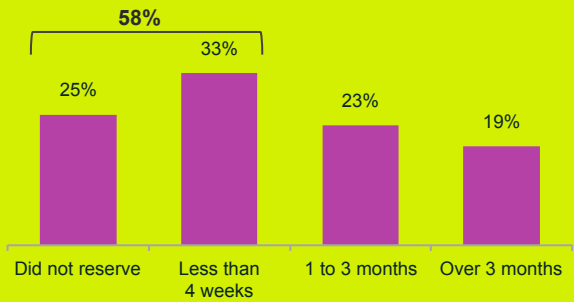


Campground website



Email

Reservation time



Using the web to plan a stay

Canada



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

21.4

Canada

Type of website used to select a campground

Website Type	Canada (%)
Provincial park	57
Federal park	30
Campground directories other than PCA	22
Provincial campground association	19
TripAdvisor	13
Social media	6
Campground website	2
Search engine	1
None	8

# \$ ECONOMIC IMPACT

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

Indicators*	BC	AB	SA	MA	ON	QC	Atlantic Provinces
<b>Initial Expenditures</b> Campers direct and indirect expenses, RV dealers profit margin, RV manufacturing sales.	\$492M	\$754M	\$162M	\$125M	\$1.0G	\$756M	\$279M
<b>Gross Output</b> Gross expenses of all product and service providers, induced expenses due to increase of economic activity.	\$1.0G	\$1.5G	\$330M	\$209M	\$2.0G	\$1.8G	\$510M
<b>Wages and Salaries</b> Workforce salaries and social benefits	\$351M	\$576M	\$121M	\$74M	\$690M	\$639M	\$184M
<b>Jobs</b> Total number of employees, based on a full time week of 40 hours over a one year period (FTE).	7,524	10,940	2,485	1,785	15,076	15,132	4,656
<b>Tax Income</b> Sales tax and income taxes.	\$137M	\$259M	\$54M	\$39M	\$294M	\$351M	\$92M
<b>GDP Basic Price</b>	\$606M	\$933M	\$199M	\$127M	\$1.2G	\$1.0G	\$311M

\*Numbers were rounded.

M : Million – G : Billion

## METHODOLOGY

### Campground Market

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

### Camper Market

- Web panel survey with 1,047 campers Canada-wide.

### Economic Impact

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

## BACKGROUND



[www.ccrvc.ca](http://www.ccrvc.ca)

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

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

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