

# 2021 NMMA CANADA STATE OF THE INDUSTRY

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Sara Anghel, President NMMA Canada

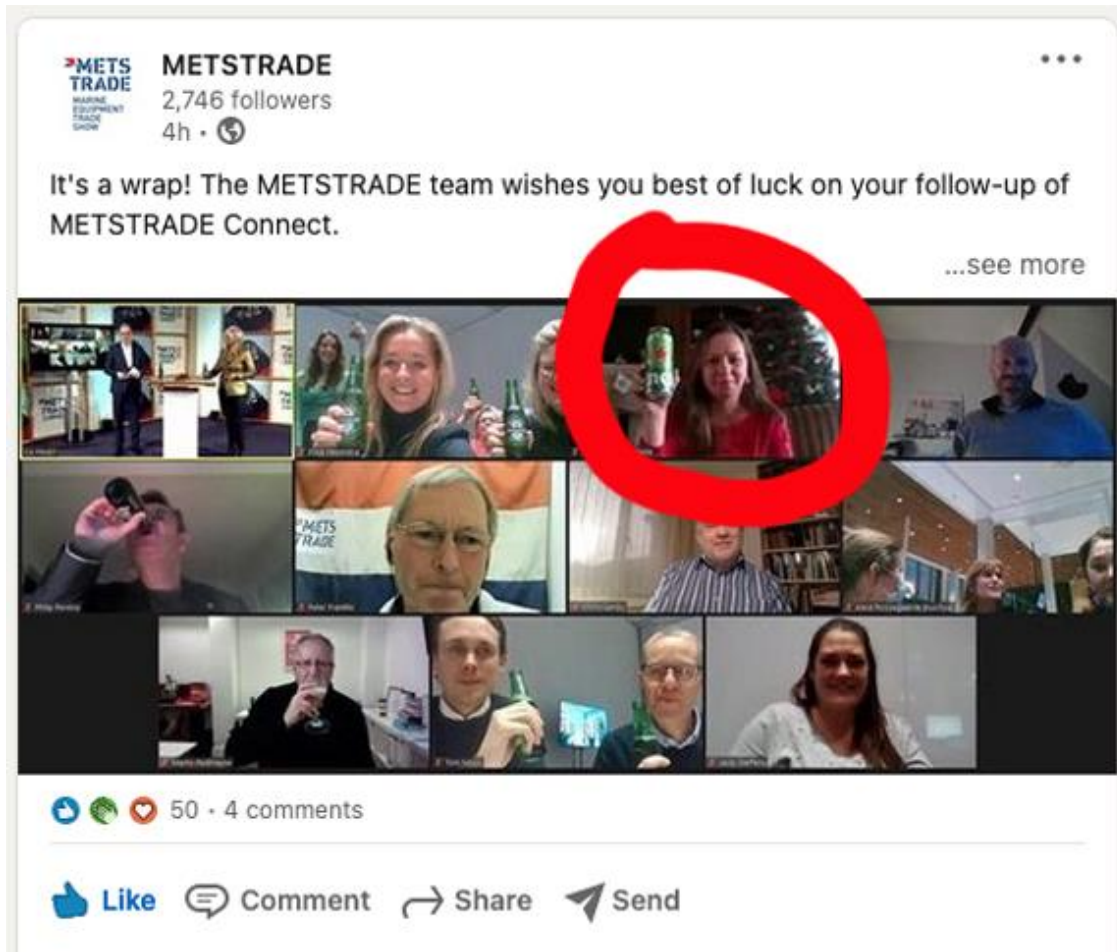


# 2020 IN REVIEW – EXPORT PROMOTION

- Largest METS Canadian pavilion yet visited by Canadian Trade Commissioner to the Netherlands
- Secured an additional \$120,000 for METS, Genoa, Croatia.
- Secured more than \$600,000 over the last seven years.
- 2021 plans are made – hoping for normal times!



# INVOLVEMENT WITH ICOMIA



# 2020 IN REVIEW – THE NEED FOR OUTDOOR RECREATION INFRASTRUCTURE

- Secured an Op-Ed in Canada’s #1 Government Relations newspaper *The Hill Times*.
- Work continued to evolve with the Canadian Outdoor Recreation Roundtable
  - Asked for dealer relief during early days of COVID
  - Letter to Prime Minister/Environment Minister related to tourism/parks infrastructure



## Now is the time to invest in renewing Canada’s outdoor recreation infrastructure

The jobs and economic impact of these investments would be a great boon to all regions of Canada, including rural and remote and Indigenous communities.



Sara Anghel  
*Opinion*

With warmer weather sweeping across much of our country, Canadians are venturing outside and looking for safe ways to spend time with family and friends. Outdoor recreation—be it getting on a boat and fishing, hiking through a provincial park, camping in your RV or motoring along a wooded trail—is the perfect prescription for a lockdown-weary nation.

As Canadians embrace the outdoors and plan “staycations,” policymakers are looking for ways to give businesses a shot in the arm while investing in projects that will position our country to emerge from this crisis economically stronger and more resilient. This is where we, as members of the Canadian Outdoor Recreation Roundtable (CORR), see a historic window to renew and expand Canada’s outdoor recreation economy and the cherished year-round outdoor infrastructure our industry depends on.

Outdoor recreation is a big part of Canada’s economy. CORR members represent thousands of businesses that produce vehicles, equipment, gear, apparel, and services for the millions of Canadians who enjoy our national parks, waterways, byways, trails, and outdoor spaces. The collective outdoor recreation industry is conservatively estimated to produce \$26-billion in economic activity for Canada each year, generating an estimated 472,713 direct jobs, \$7.1-billion in taxes, and \$52.1-billion in total revenues.

Making these economic contributions more impressive is the fact that outdoor recreation businesses have been able to not just survive, but thrive, despite the crumbling conditions of the recreation infrastructure our businesses and customers rely on. In

addition to jeopardizing the significant economic benefits these public areas provide, Canada’s mounting multi-billion-dollar deferred maintenance and repair backlog at national and provincial parks negatively impacts visitor access, enjoyment, and safety on public lands and waters.

From months-long emergency shut-downs to travel restrictions, the outdoor sector has been hit hard by the pandemic. A recent report by Export Development Canada on the impacts of COVID-19 on the Canadian tourism sector found that “more than 40 per cent of businesses in these industries are expecting to see a 50 per cent decline in revenues, the highest proportion amongst all industries.” Another sobering statistic: a recent survey of Canada’s recreational fishing industry showed that three-quarters of respondents had seen a decline in sales ranging from 25 per cent to 75 per cent for April and May compared to the same period in 2019. When asked what they would like to see in addition to short-term financial assistance, many respondents listed “better access to public waters and more promotion of outdoor recreational activities” as priorities.

Outdoor recreation businesses are often lifelines for their communities, providing jobs and economic stability. However, they rely on trips and travel bringing a steady stream of visitors to our public and private lands and waters. Other factors that our industry relies on—accessibility to recreation assets, adequate recreation infrastructure, and the certainty of manufacturing and trade—have also been interrupted by COVID-19.

As during the 2008-09 financial crisis, governments are currently earmarking billions in infrastructure funding and calling on communities to launch “shovel-ready” projects. There are many smaller projects—



When it comes to ‘shovel-ready’ projects, there are many smaller projects—improving and expanding trails, marinas, campgrounds, and other recreational infrastructure—that could be started quickly and done this fiscal year, writes Sara Anghel. Photograph courtesy of Pixabay

improving and expanding trails, marinas, campgrounds, and other recreational infrastructure—that could be started quickly and done this fiscal year.

The jobs and economic impact of these investments would be a great boon to all regions of Canada, including rural and remote and Indigenous communities. According to the U.S. National Park Service, for example, every dollar invested in the national park system returns \$10 to the U.S. economy from visitor spending.

As Canadians, we have long prided ourselves on the rugged and pristine beauty of our country. Let’s seize this chance to jumpstart the Canadian workforce and make our great outdoors more accessible and enjoyable for today’s and future generations.

Sara Anghel is the president of the National Marine Manufacturers Association Canada and a founding member of the Canadian Outdoor Recreation Roundtable (CORR), the country’s leading coalition of 12 outdoor recreation trade associations serving tens of thousands of businesses. *The Hill Times*

# 2020 IN REVIEW – PARLIAMENTARY OUTDOOR CAUCUS BREAKFAST



# 2020 IN REVIEW – LUXURY TAX ADVOCACY





PRIME MINISTER / PREMIER MINISTRE

## PRIME MINISTER RESPONDS TO OUR LETTER ON TRADE JULY 2020

*“Our government understands that the free flow of goods and services between the U.S. and Canada including aluminum – is important for jobs and economic growth in both countries.”*

*“You can be assured that we will defend Canada’s aluminum sector and its workers, and keep working towards ensuring that free flow remains uninterrupted.” Justin Trudeau*

Ottawa, Ontario  
K1A 0A2

July 21, 2020

Dear Mr. Hugelmeier and Ms. Anghel:

I would like to thank you for taking the time to write regarding aluminum tariffs between the United States and Canada.

Our government understands that the free flow of goods and services between the U.S. and Canada – including aluminum – is important for jobs and economic growth in both countries. You can be assured that we will always defend Canada’s aluminum sector and its workers, and keep working towards ensuring that free flow remains uninterrupted. We firmly believe that our aluminum exports do not harm the US market, and that is something we are emphasizing in our ongoing conversations with our American partners.

Once again, thank you for writing. I wish you all the best.

Please accept my warmest regards.

Sincerely,

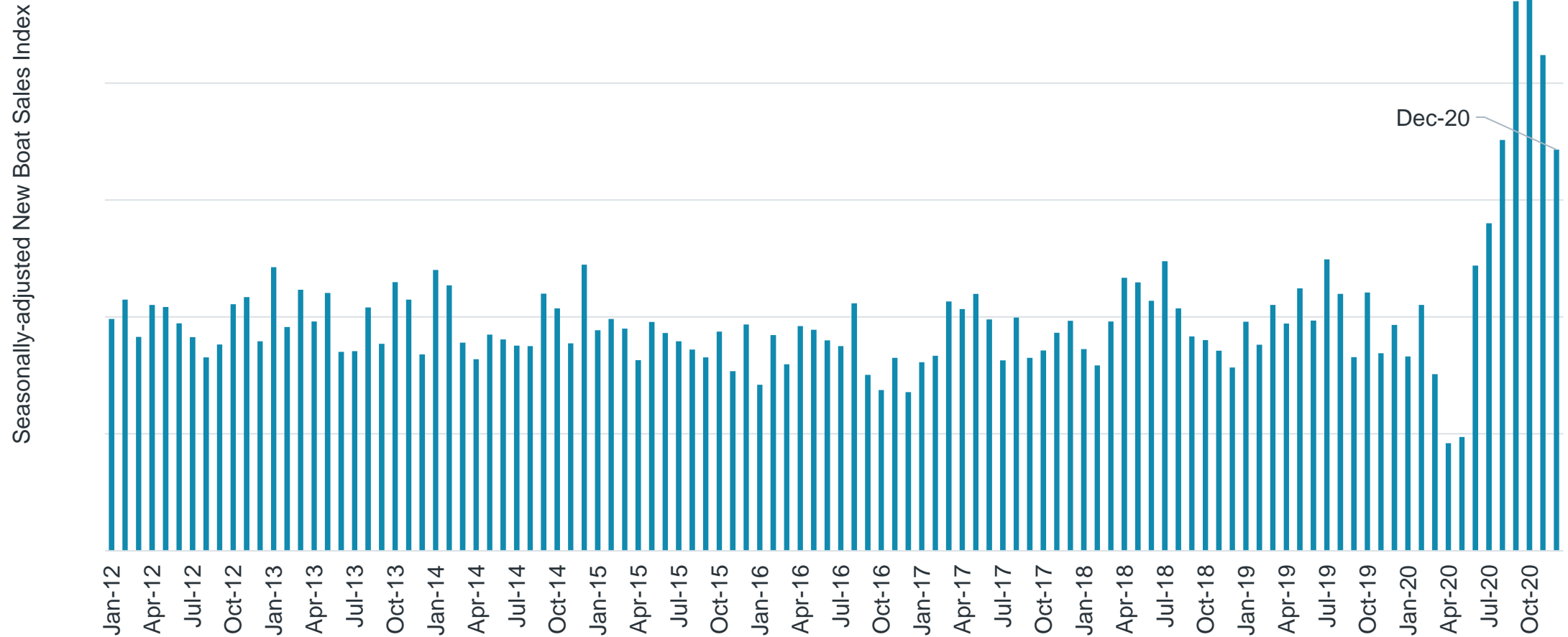
Mr. Frank Hugelmeier, President of the National Marine Manufacturers Association  
Ms. Sara Anghel, President of the National Marine Manufacturers Association Canada  
National Marine Manufacturers Association (NMMMA) Canada  
14 McEwan Dr. W. Unit 8  
Bolton, Ontario  
L7E 1H1

# MOST RECENT ADVOCACY

- New Director General at Transport Canada Office of Boating Safety (Key bureaucrat in charge of Recreational Boating) Julie Gascon
- Stephanie Kusie, Member of Parliament Calgary Midnapore (Shadow Cabinet Minister for Transport) Conservative
- Tony Baldinelli, Member of Parliament Niagara Falls (Shadow Cabinet Minister for Tourism) Conservative
- Alister Smith, Deputy Director, Trillium Network for Advanced Manufacturing
- More than a dozen letters to various ministers in Ottawa and Ontario following initial lockdowns
- Meeting with policy staff to Ontario's Minister of Environment on E15 in Ontario
- Application for boating on-water safety program
- Transport Canada Changes
  - Pleasure Craft Licensing Program
  - Changes to Rental Safety Checklist

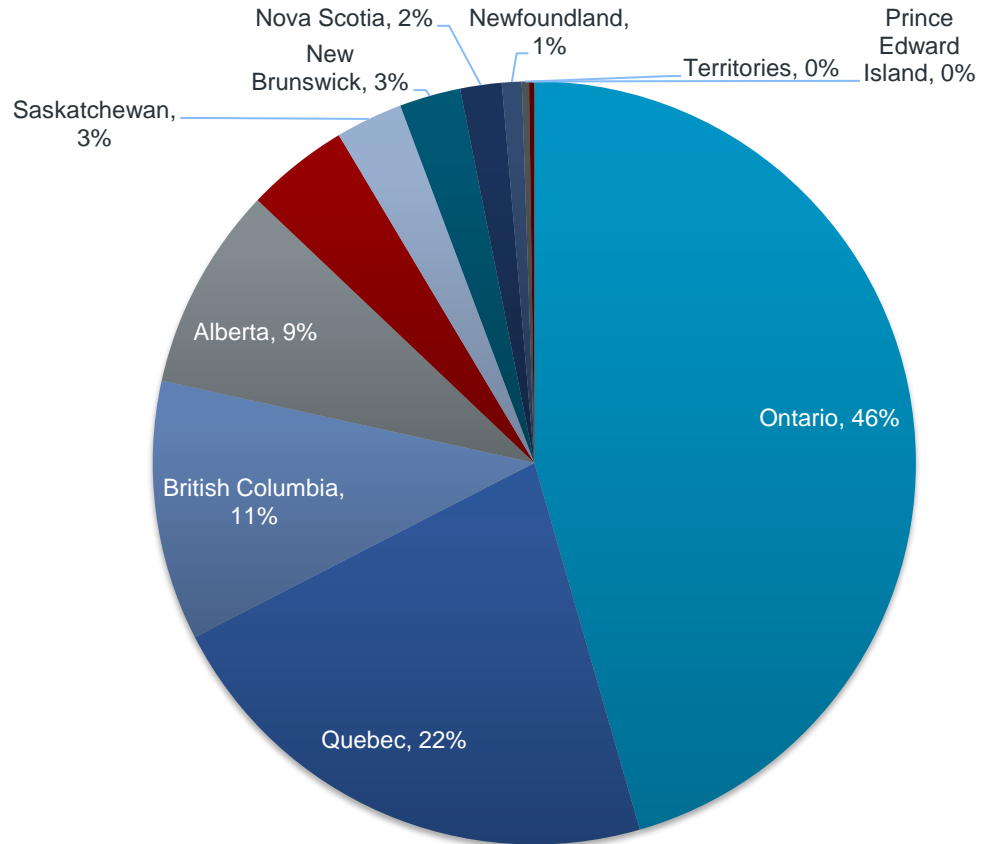


# CANADIAN NEW BOAT SALES UPWARD TRAJECTORY

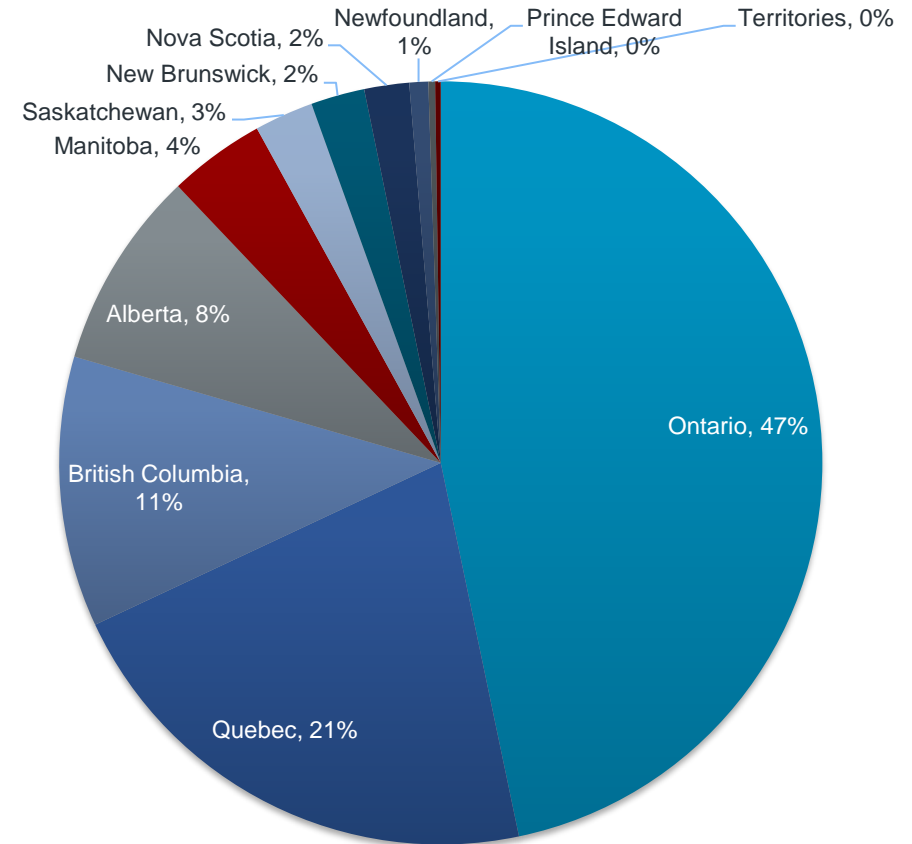


# CANADIAN BUYING BEHAVIOR BY PROVINCE

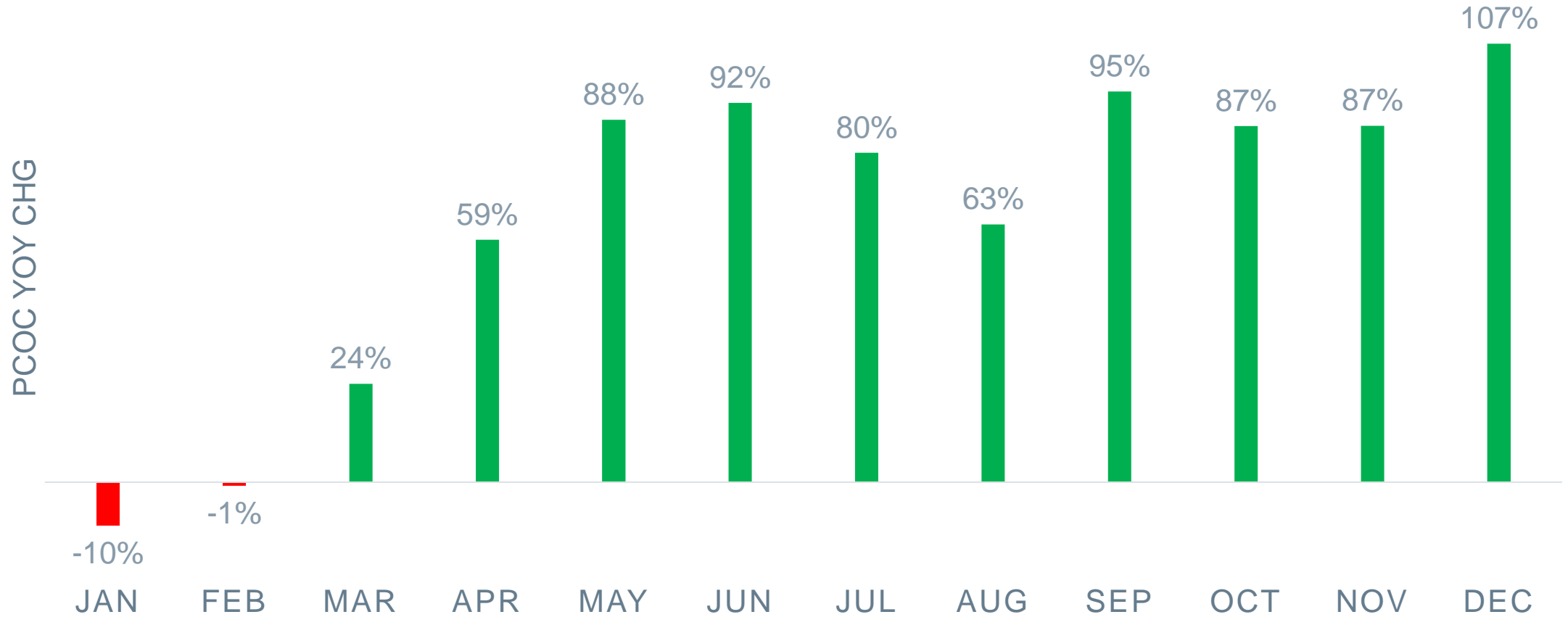
2020



2019



# RISE IN INTEREST – PLEASURE CRAFT OPERATOR CARDS UP 73% VS 2019





# Surges with Record Traffic in 2020

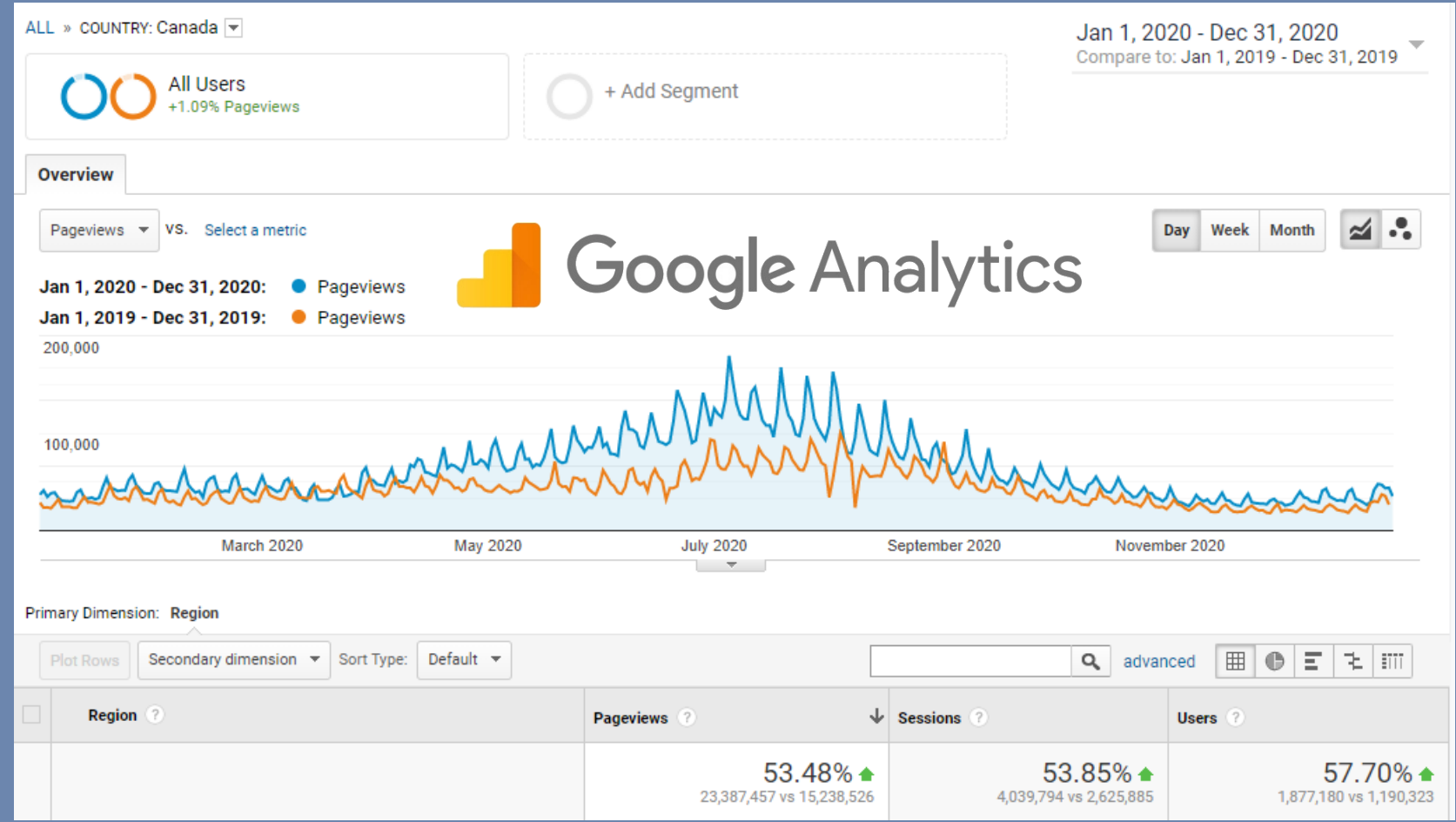
# BoatDealers.ca

Traffic Canada – 2020 vs 2019

BoatDealers.ca recorded a 57% increase in unique Canadian visitors in 2020, as well as a 51% increase in unique global traffic.

Over 4.7 million visitors flocked to the site, of which 2.4 million were unique visitors.

The total traffic accounted for over 23 million pageviews in Canada, and over 25 million pageviews total.



# CANADIAN CONSUMER DEMOGRAPHICS

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FIRST TIME BOAT BUYERS MORE LIKELY TO:

PURCHASE PRE-OWNED

(52% V. 42% IN THE U.S.)

SLIGHTLY OLDER

(AVERAGE AGE: 46.5 V. 44.5 IN THE U.S.)

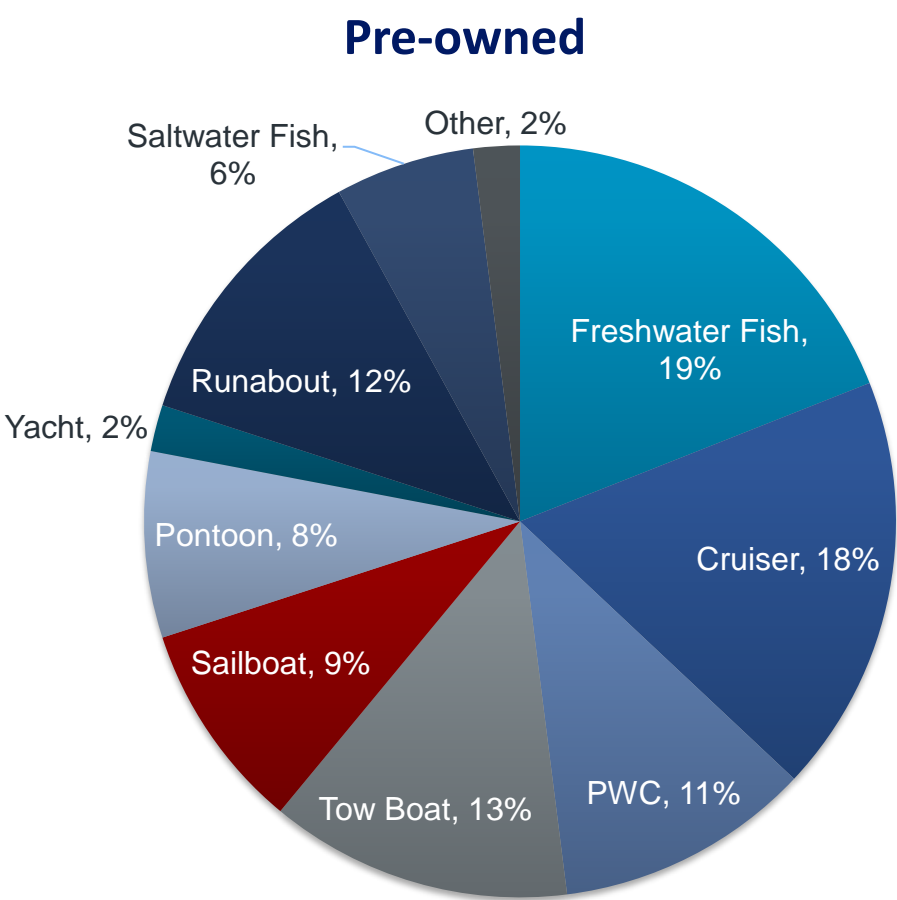
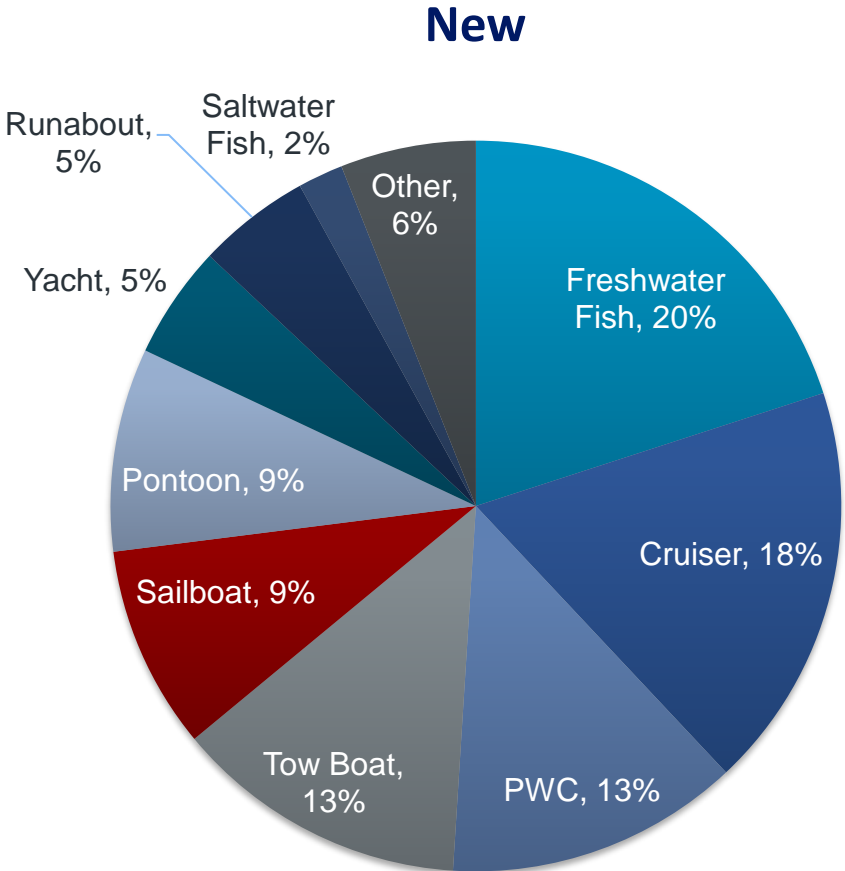
MORE HOMOGENOUS

(84% WHITE V. 77% IN THE U.S.)

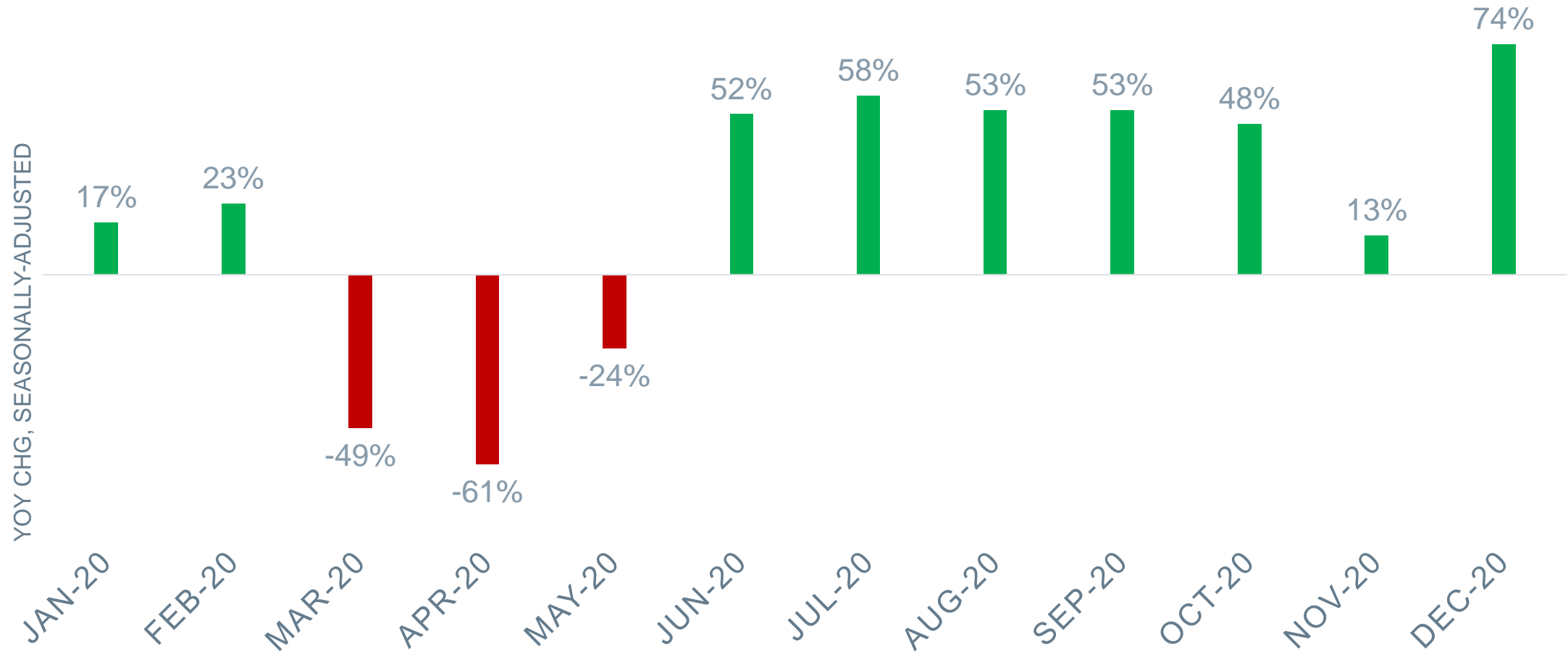
2ND LARGEST ETHNIC GROUP WERE ASIANS

(12% V. 6% IN THE U.S.)

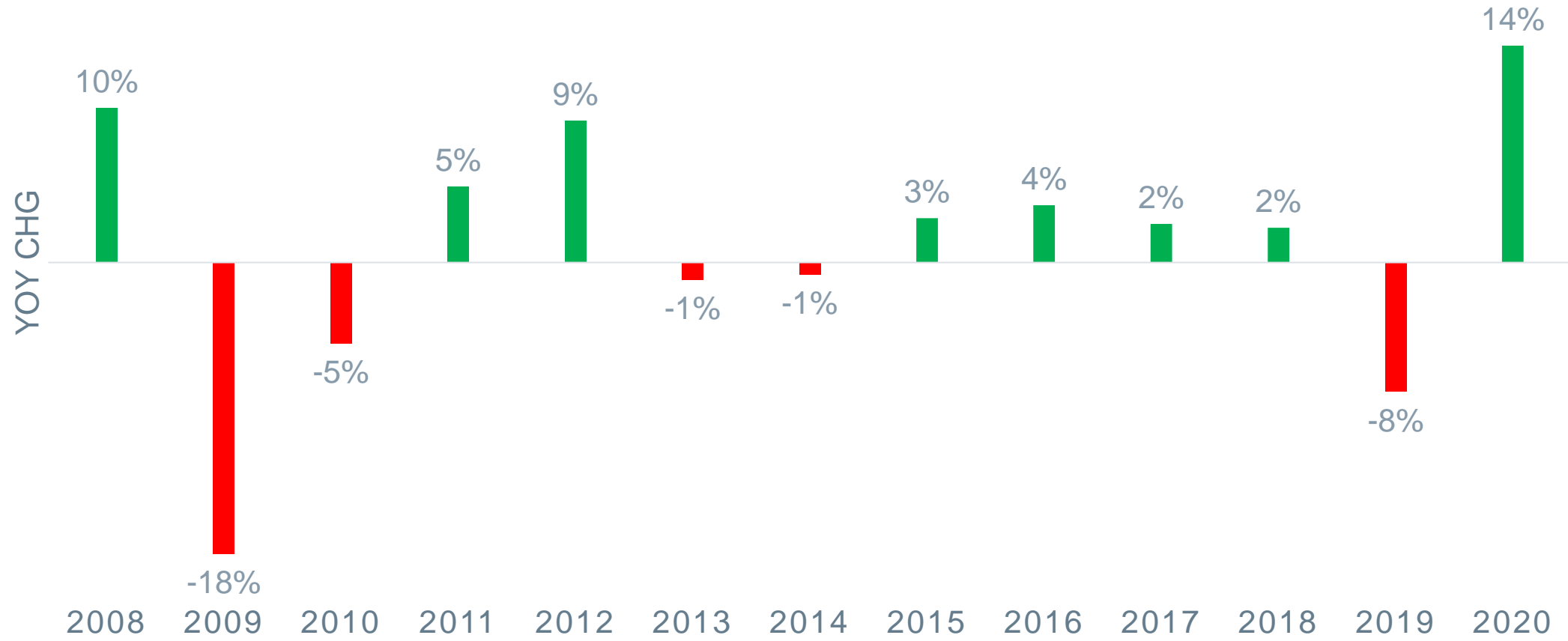
# CANADIAN BUYING BEHAVIOR (NEW V. PRE-OWNED)



# OUTBOARD ENGINE RETAIL SALES IN 2020



# ANNUAL OUTBOARD ENGINE RETAIL SALES

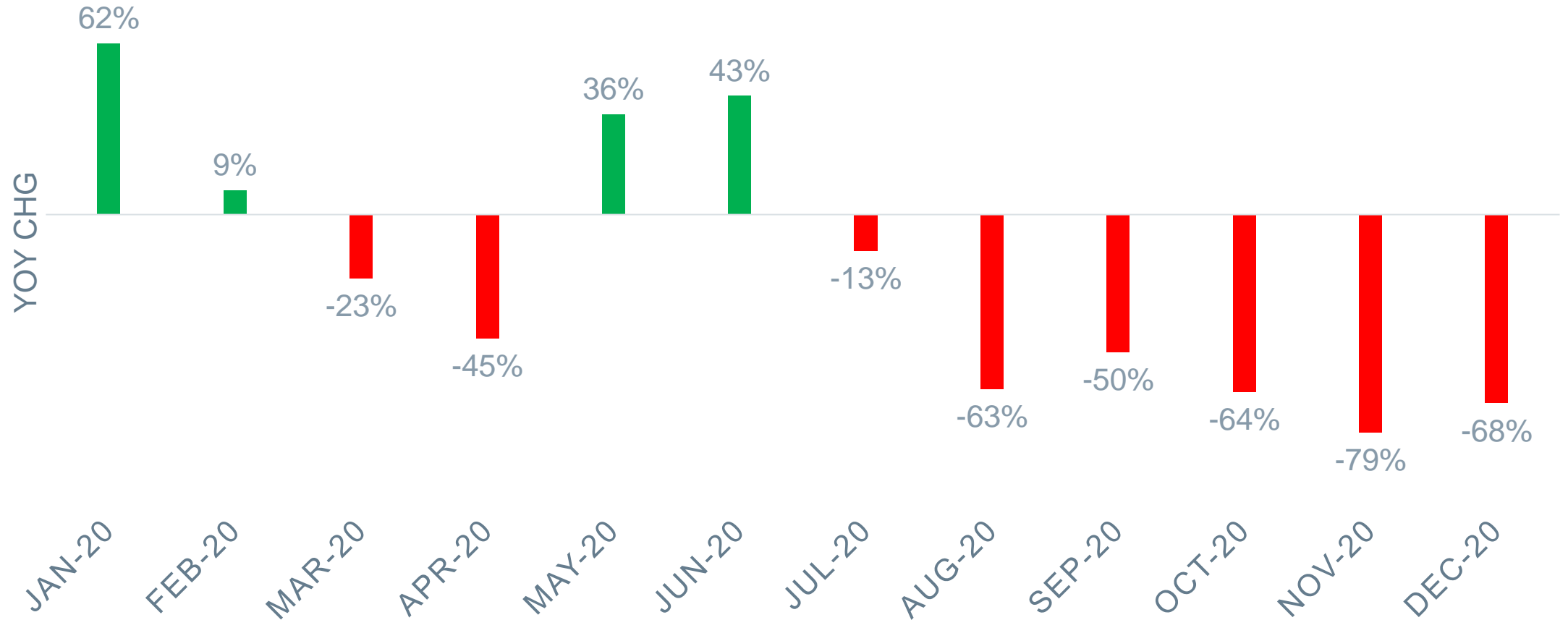


SOURCE: NMMA

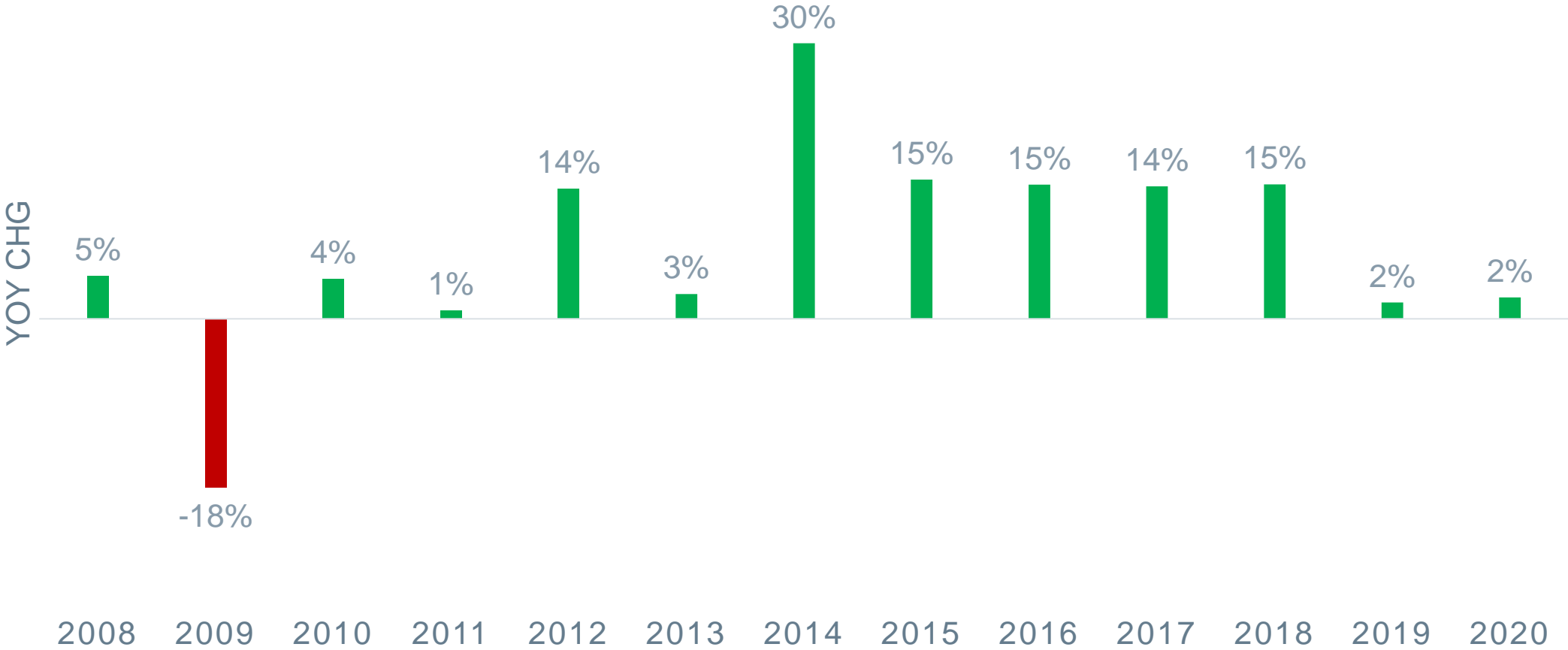




# NEW PERSONAL WATERCRAFT RETAIL SALES IN 2020



# ANNUAL NEW PERSONAL WATERCRAFT RETAIL SALES



SOURCE: NMMA