



CADA 

Canadian Automobile Dealers Association
Corporation des associations de détaillants d'automobiles

FINAL REPORT
November 2023

The Economic Impacts of New Car Dealers in Canada

NCDA
New Car Dealers Association of BC

MVRO
Motor Vehicle Retailers of Ontario

MDA
Motor Vehicle Dealers Association of Alberta

NBADAC
New Brunswick Automobile Dealers Association of Canada

MMDA
Manitoba Motor Dealers Association

ADANL
Automobile Dealers Association of New Brunswick

CCAQ
Canadian Car Association of Quebec

nsadsa
Newfoundland and Labrador Automobile Dealers Association

Prince Edward Island Automobile Dealers Association


SADA
Saskatchewan Automobile Dealers Association

MNP

RESEARCH PARTNER

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MESSAGE FROM THE CANADIAN AUTOMOTIVE DEALERS' ASSOCIATION

Automotive retail dealers are an integral part of the economic and social fabric of their communities. Our over 3,400 members are present in almost all towns and cities across Canada selling and servicing vehicles while providing substantial employment opportunities and directly contributing important amounts to local, provincial and national Output, GDP and Tax Revenue and generating additional indirect and induced economic contributions.


Our members run the range from family owned, single point businesses with 30 employees to publicly traded corporations operating over 70 dealerships. This Economic Impact Study, prepared by our research partner MNP, provides the data that shows the full scope of the contributions of the automotive retailing to the Provincial and Canadian economies.



We trust you will find this information useful and encourage you to engage with CADA, our Provincial Associations and our individual members to find out more about how automotive retailers are, and will continue to be, an essential part of our economy and society.

Sincerely,

Tim Reuss
President and Chief Executive Officer
CADA



As CADA's Lead Economist, I am more than pleased to introduce this Economic Impact Study, a critical initiative that aligns with our vision of becoming a central hub for economic information, data, and quantitative insights within the automotive industry. This study reflects our ongoing commitment to solidify our industry's position as an economic powerhouse.

While those entrenched in the automotive sector recognize its economic significance, data-driven evidence is paramount. This study provides the empirical foundation required to articulate comprehensively our industry's economic importance. It will also add another layer of legitimacy to our interactions with politicians, policy makers, and other key stakeholders.



By using 2022 data, here are some of the key insights from the study:

- Canadian automobile dealers sold 1,488,645 new vehicles.
- Directly employed 167,790 people, 56 percent of whom were in jobs requiring a post-secondary credential, professional certification or significant experience.
- Recorded total revenues of \$151.5 billion, of which 54 percent was attributable to the sale of new vehicles and the remainder was attributable to the sale of parts, accessories, used vehicles and maintenance services.

In an era where data drives decisions, this study equips us with the essential tools to advocate effectively, ensuring our industry's voice is heard at the highest levels of government. The CADA team is proud to be at the forefront of this transformative endeavor, and we look forward to the significant impact it will have on our industry's future.

Thank you for your continued support as we work together to shape the economic landscape of our industry.

Sincerely,

Charles Bernard
Lead Economist
CADA

EXECUTIVE SUMMARY

The Canadian Automobile Dealers Association (CADA) engaged MNP LLP (MNP) to carry out an economic impact study of new car dealer operations in Canada.

KEY STATISTICS

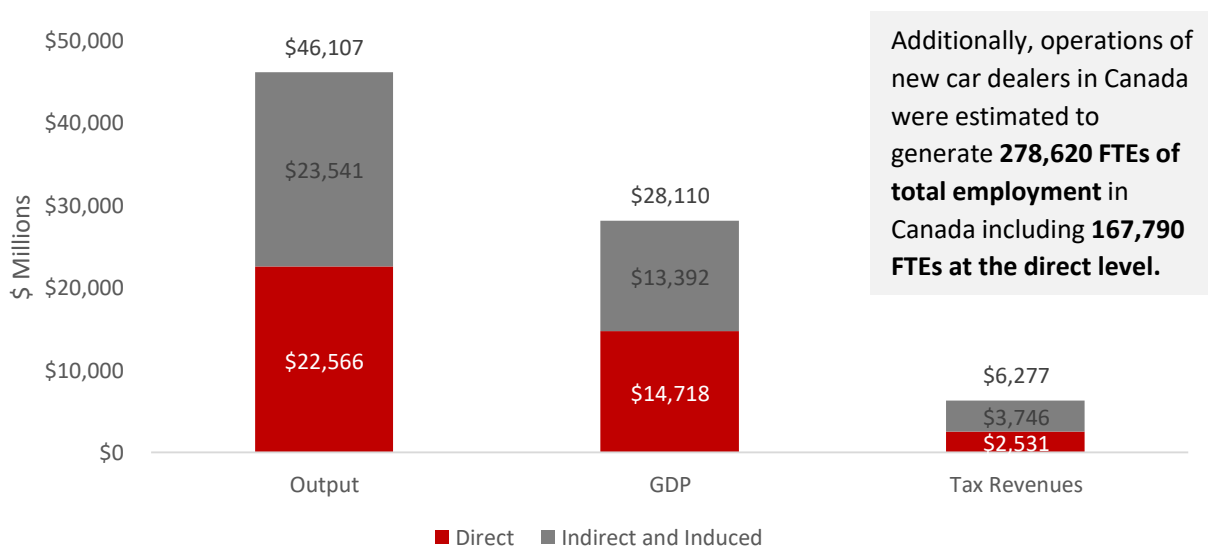
In 2022, new car dealers in Canada's provinces and territories:¹

- Sold 1,488,645 new vehicles.
- Directly employed 167,790 people, 56 percent of whom were in jobs requiring a post-secondary credential, professional certification or significant experience.
- Recorded total revenues of \$151.5 billion, of which 54 percent was attributable to the sale of new vehicles and the remainder was attributable to the sale of parts, accessories, used vehicles and maintenance services.

ECONOMIC IMPACTS

Figure A shows the estimated economic impacts of Canada's new car dealers in 2022.

Figure A: Estimated Economic Impacts of New Car Dealers, 2022



¹ Please note that although the focus of this project was Canada's 10 provinces, Canada's three territories are included in the national impacts.

Table A shows the estimated economic impacts of Canada's new car dealers in 2022 by province and in the territories. Operations in Ontario accounted for the largest share of impacts (between 33 percent to 43 percent) while operations in Quebec recorded the second largest share, accounting for approximately 19 to 30 percent of all impacts, followed by Alberta (10 percent to 15 percent) and British Columbia (10 percent to 13 percent). Operations in each of the other provinces and the territories accounted for approximately 0.1 percent to 4 percent of the impacts.

Table A: Estimated Total Economic Impacts of New Car Dealers in Canada by Province and in the Territories, 2022

Province	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Ontario	\$17,268	\$10,325	106,020	\$1,061	\$931	\$376
Quebec	\$10,628	\$6,567	62,890	\$488	\$829	\$209
Alberta	\$6,597	\$4,082	39,360	\$373	\$272	\$107
British Columbia	\$5,673	\$3,449	33,360	\$336	\$350	\$89
Manitoba	\$1,564	\$968	9,830	\$99	\$106	\$34
Saskatchewan	\$1,517	\$969	8,700	\$93	\$99	\$16
Nova Scotia	\$986	\$596	6,640	\$53	\$69	\$13
New Brunswick	\$1,082	\$663	7,620	\$64	\$75	\$27
Newfoundland and Labrador	\$577	\$356	3,060	\$32	\$39	\$7
Prince Edward Island	\$126	\$75	750	\$7	\$9	\$1.2
Territories ²	\$89	\$60	390	\$4	\$7	\$1.8
Total	\$46,107	\$28,110	278,620	\$2,610	\$2,786	\$881

² Includes Nunavut, Yukon and the Northwest Territories.

In addition to spending on operations, new car dealers make investments in construction and renovation of their facilities. Between 2018 and 2022, new car dealers were estimated to have invested approximately \$1 billion annually in new and existing facilities. Figure B shows the estimated economic impacts of this investment.

Figure B: Estimated Annual Economic Impacts of New Car Dealers' Investments in New and Existing Facilities, 2018 to 2022

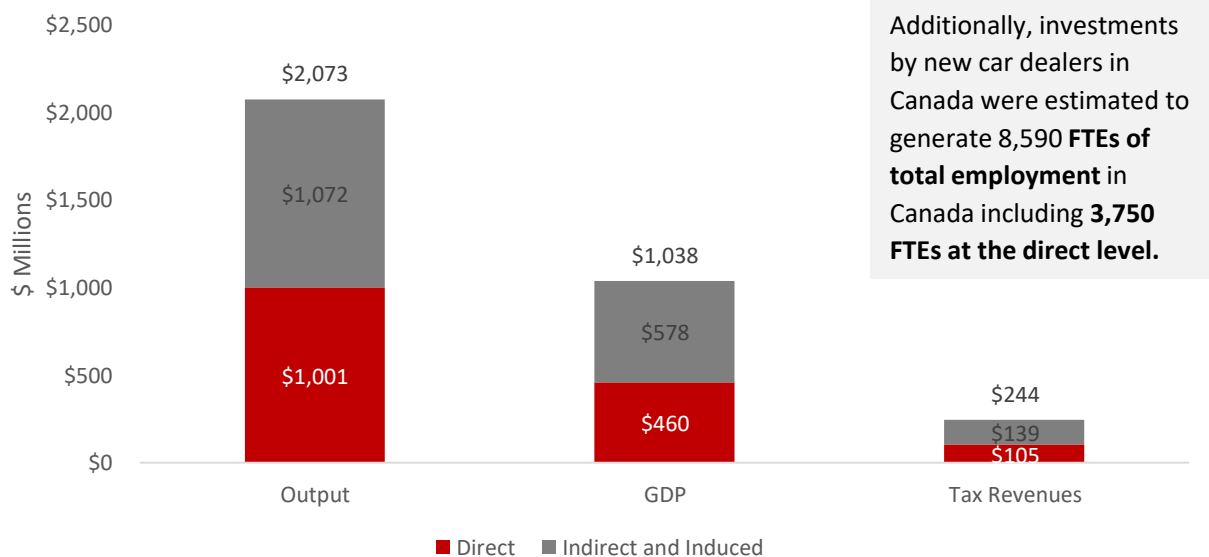


Table B shows the estimated total direct, indirect and induced estimated impacts generated by the investments of new car dealers in each province. Ontario accounted for the largest share of impacts (between 27 and 44 percent), followed by Quebec (between 18 to 28 percent). Alberta and British Columbia each accounted for 12 to 18 percent of the national impact. Investments each of the other provinces accounted for approximately one percent to six percent of the impacts.

Table B: Estimated Total Economic Impacts of Investment in New and Existing Facilities by New Car Dealers in Canada by Province

Province	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Ontario	\$600	\$324	2,600	\$30	\$29	\$20.8
Quebec	\$477	\$237	2,030	\$17	\$29	\$9.0
Alberta	\$370	\$172	1,290	\$16	\$13	\$7.9
British Columbia	\$293	\$149	1,260	\$14	\$17	\$6.6
Manitoba	\$104	\$46	400	\$5	\$5	\$1.5
Saskatchewan	\$75	\$38	330	\$3	\$3.9	\$1.3
New Brunswick	\$62	\$29	290	\$2.7	\$2.7	\$0.6
Nova Scotia	\$45	\$21	200	\$1.8	\$2.1	\$0.5
Newfoundland and Labrador	\$39	\$18	140	\$1.6	\$1.9	\$0.5
Prince Edward Island	\$8	\$4	50	\$0.3	\$0.4	\$0.04
Total	\$2,073	\$1,038	8,590	\$91.4	\$104.0	\$48.7



1. INTRODUCTION

1.1 BACKGROUND AND PURPOSE

The Canadian Automobile Dealers Association (CADA) is the national industry association representing new car and truck dealers. It is a federation of the provincial automobile dealer associations in Canada and works closely with the provincial associations to provide services to the dealers. CADA represents over 3,400 new car dealers in Canada and is concerned with issues of a national nature that affect the well-being of new car and truck dealers in Canada.^{3,4}

To assist with its advocacy efforts and support its provincial dealer associations, CADA engaged MNP LLP (MNP) to carry out an economic impact analysis of new car dealer operations at both the national and provincial level.

The scope of the study included:

- Estimating the economic impacts generated by new car dealers in each of the 10 Canadian provinces and at the national level.
- Describing the types of jobs at new car dealers.
- Developing a case study for each of the 10 provinces to demonstrate new car dealers' social and community contributions.

Please note that although the focus of this project was Canada's 10 provinces, the national estimates include the three territories.

1.2 APPROACH

In preparing this report, MNP carried out the following activities:

- Gathered information on the number of locations, revenues, expenditures, and employment of new car dealers from CADA and publicly available resources such as Statistics Canada.
- Identified gaps in data and information and developed strategies to fill those gaps.
- Developed estimates of the economic impacts created by new car dealers in Canada.
- Developed a workforce profile and value chain description.
- Developed case studies on the broader economic and social contributions of new car dealers in each province.
- Developed a report that summarizes the economic impacts of new car dealers at the national level.

³ CADA Data Report 2022. Retrieved from

<https://www.cada.ca/common/Uploaded%20files/EconomicReports/CADA%20Data%20Report%20-%20EN.pdf>

⁴ Canadian Automobile Dealers Association, About us. Available here:

https://www.cada.ca/web/CADA/About/CADA/About/About_Landing.aspx?hkey=a4457b25-50ea-4c8b-9d86-46780a5444ea



1.3 STRUCTURE OF THE REPORT

The remaining sections of this report are organized as follows:

- Section 2 provides an overview of new car dealers in Canada.
- Section 3 summarizes the economic impacts created by new car dealers in Canada and their workforce profile.
- Section 4 presents case studies on new car dealers' broader economic and social contributions in each province.
- The appendices provide additional detail on the economic impact methodology, relevant assumptions, and background information about MNP.

1.4 LIMITATIONS

This report is not intended for general circulation, nor is it to be published in whole or in part without the prior written consent of CADA and MNP. The report is provided for information purposes and is intended for general guidance only. It should not be regarded as comprehensive or a substitute for personalized, investment or business advice.

We have relied upon the completeness, accuracy and fair presentation of all information and data obtained from CADA's members, CADA and public sources believed to be reliable. The accuracy and reliability of the findings and opinions expressed in the presentation are conditional upon the completeness, accuracy and fair presentation of the information underlying them. As a result, we caution readers not to rely upon any findings or opinions for business or investment purposes and disclaim any liability to any party who relies upon them as such.

The findings and opinions expressed in the presentation constitute judgments as of the date of the presentation and are subject to change without notice. MNP is under no obligation to advise of any change brought to its attention that would alter those findings or opinions.

2. ABOUT NEW CAR DEALERS IN CANADA

2.1 OVERVIEW OF NEW CAR DEALERS IN CANADA

New car dealers are part of the retail automotive industry. This industry consists of businesses primarily involved in selling new cars, SUVs, light-duty trucks, and vans (including mini-vans) to individual customers or car leasing companies. These businesses also commonly sell used cars, replacement parts, accessories, and offer repair services.^{5, 6}

In 2022 there were 3,458 new car dealers in Canada that sold 1,488,645 new vehicles across the country.⁷ Table 1 provides the distribution of new car dealers by province.

Table 1: Provincial Distribution of New Car Dealers in Canada, 2022

Province	Dealership Count
Ontario	1,210
Quebec	860
British Columbia	408
Alberta (includes Yukon and Nunavut)	394
Saskatchewan	149
Nova Scotia	125
Manitoba	116
New Brunswick	110
Newfoundland and Labrador	65
Prince Edward Island	21
Total	3,458

Source: CADA Data Report 2022.

⁵ Statistics Canada. NAICS Canada. Automotive dealers.

⁶ CADA website. Retrieved from https://www.cada.ca/CADA/CADA/About/About_Landing.aspx?hkey=a4457b25-50ea-4c8b-9d86-46780a5444ea

⁷ CADA Data Report 2022. Retrieved from <https://www.cada.ca/common/Uploaded%20files/EconomicReports/CADA%20Data%20Report%20-%20EN.pdf>

Canadian Automotive Dealers Association

CADA is represented in nearly every community through its members. Approximately 3,400 franchised automobile and truck dealerships are members of CADA. CADA works to represent its members by:

- Working with the federal government on issues that affect the retail sector of the automobile industry;
- Protecting the interests of dealers under the franchise system;
- Strengthening relations between dealers and manufacturers; and
- Managing public affairs and media relations.

In return, the members have access to CADA services, which include employee benefits, retiree benefits, and insurance programs.

CADA's provincial and regional members include:

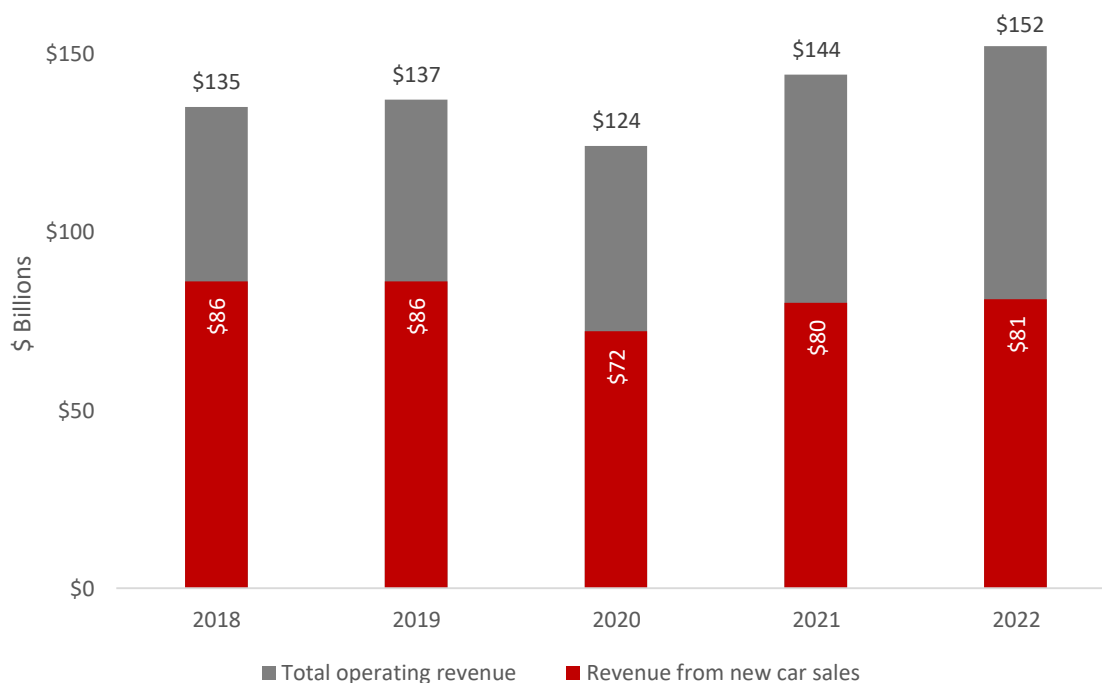
- New Car Dealers Association of BC (NCDA);
- Motor Dealers Association of Alberta (MDA);
- Saskatchewan Automobile Dealers Association (SADA);
- Manitoba Motor Dealers Association (MMDA);
- Motor Vehicles Retailers of Ontario (MVRO);
- Corporation of Automotive Dealers of Quebec (CCAQ);
- Montreal Automobile Dealers Association (CCAM);
- New Brunswick Automobile Dealers Association (NBADA);
- Nova Scotia Automobile Dealers Association (NSADA);
- Automobile Dealers Association of Newfoundland and Labrador (ADANL); and
- Prince Edward Island Association (PEIADA).

Source: CADA website. About CADA. Retrieved from

https://www.cada.ca/CADA/CADA/About/About_Landing.aspx?hkey=a4457b25-50ea-4c8b-9d86-46780a5444ea

Figure 1 shows revenues for new car dealers in Canada between 2018 and 2022. During this period, revenues from the sale of new vehicles accounted for between 54 percent and 64 percent of total operating revenues. From 2018 to 2019, total operating revenues and revenues from new car sales increased by approximately one percent. In 2020, as a result of COVID-19 restrictions and supply chain issues, the overall operating revenue of dealerships decreased by nine percent compared with 2019. As the economy started opening back up in 2021, total revenues and the revenues from the sale of new cars began to recover. In 2022, the total operating revenues increased by 11 percent relative to 2019, while revenues from the sale of new cars remained below pre-pandemic levels.

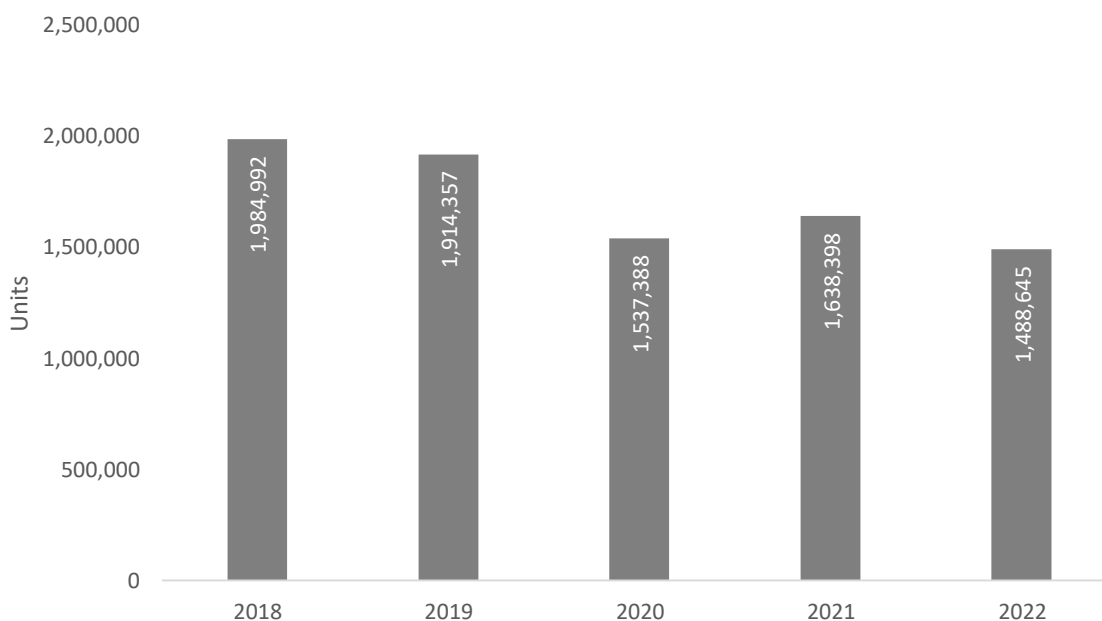
Figure 1: Operating Revenues for New Car Dealers in Canada (\$ Billions), 2018 to 2022



Source: Statistics Canada. Table 20-10-0066-01. Annual retail trade survey, financial estimates.

Figure 2 shows the number of new motor vehicles sold in Canada from 2018 to 2022. Between 2018 and 2019, new motor vehicle sales declined by approximately four percent. In 2020, COVID-19 led to a sharper drop in sales (by 20 percent compared with 2019). Shutdowns at manufacturing plants which led to reduced auto production and supply constraints for new vehicles impacted the sale of new vehicles.⁸ In 2021, demand for new vehicles rebounded but in 2022, the number of sales decreased by 9 percent, resulting in a roughly 22 percent decrease compared with pre-pandemic levels.⁹ One of the reasons for this decline was a shortage of components such as semiconductor chips. According to Statistics Canada, motor vehicle manufacturing levels in Canada in 2022 were more than 25 percent lower than in 2019.¹⁰

Figure 2: New Motor Vehicles Sales for New Car Dealers in Canada, 2018 to 2022



Source: Canadian Automobile Dealers Association

⁸ International Organization of Motor Vehicle Manufacturers, Global Auto Production in 2020 Severely Hit by COVID-19 Crisis with a 16% Drop in World Auto Production. March 2021. Available here: <https://www.oica.net/wp-content/uploads/OICA-Press-Release-2021-03-24.pdf> (Accessed: May 16, 2022)

⁹ Statistics Canada. Table 20-10-0001-01 New motor vehicle sales.

¹⁰ Bernard M.C., Dankyi E. (April 11, 2023). Statistics Canada. Enduring effects of the pandemic: The case of the passenger car rental industry in New Brunswick. Retrieved from <https://www150.statcan.gc.ca/n1/pub/11-621-m/11-621-m2023006-eng.htm>

Table 2 shows the distribution of new motor vehicles sales by province in 2022. Ontario had the largest share of sales in 2022, accounting for approximately 41 percent of the total, Quebec followed with 24 percent, while Alberta accounted for 12 percent, and British Columbia for 11 percent. Sales in the rest of Canada collectively represented 12 percent of total sales.¹¹

Table 2: New Motor Vehicles Sales in Units for New Car Dealers by Province, 2022

Province	2022	Percentage Share
Ontario	607,707	40.8%
Quebec	357,030	24.0%
Alberta	177,353	11.9%
British Columbia	161,470	10.8%
Manitoba	43,077	2.9%
Saskatchewan	40,819	2.7%
Nova Scotia	37,293	2.5%
New Brunswick	32,890	2.2%
Newfoundland and Labrador	24,156	1.6%
Prince Edward Island	6,850	0.5%
Total	1,488,645	100%

Source: CADA Data Report 2022.

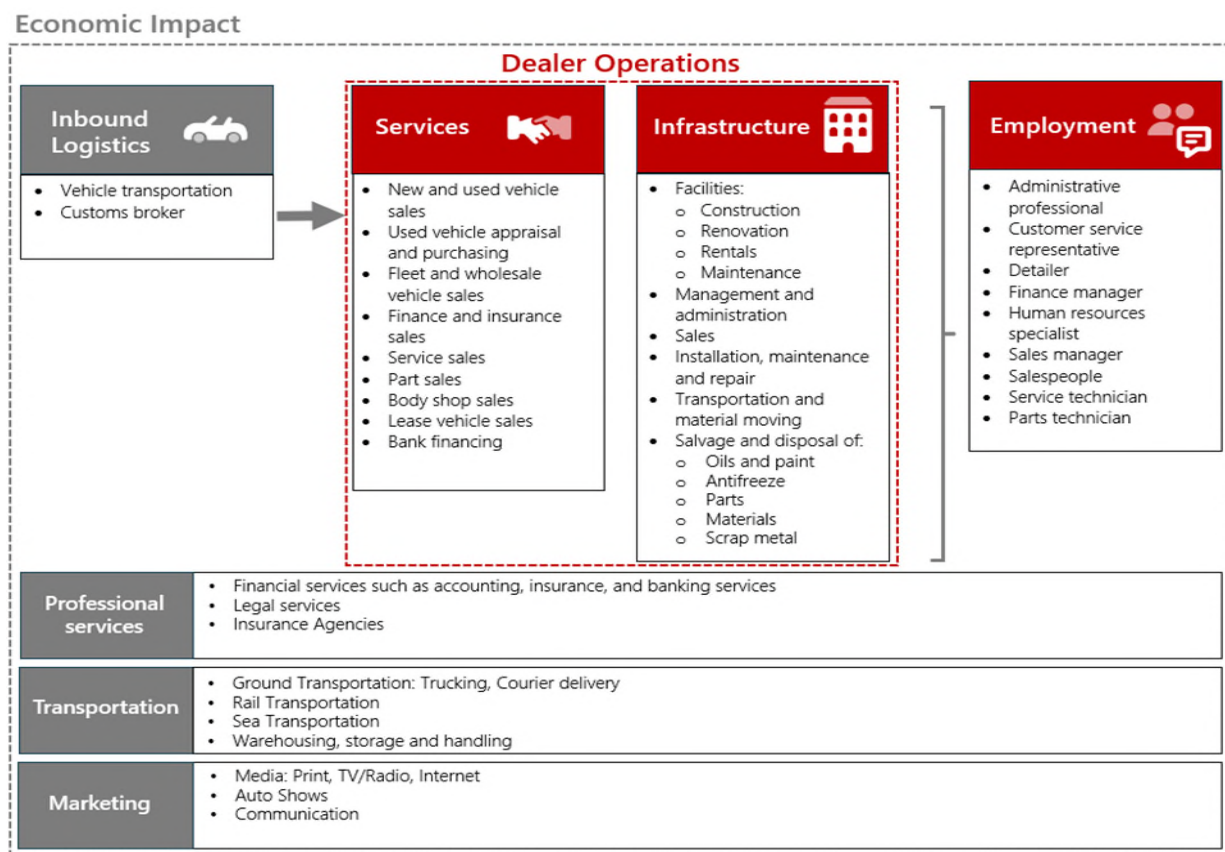
2.2 LINKAGES WITH OTHER INDUSTRIES

How new car dealers generate economic activity can be illustrated through the linkages between dealers and their suppliers (Figure 3). Vehicles and parts and accessories sold by new car dealers are transported from where they are manufactured or imported into North America to the dealerships by rail and truck. To support their operations, new car dealers purchase services from a range of suppliers including banking and financial institutions, lawyers, insurance agencies, media outlets, advertising

¹¹ CADA Data Report 2022.

agencies, couriers, waste management companies and repair and maintenance service providers.

Figure 3: Linkages Between New Car Dealers and Other Industries



3. ECONOMIC IMPACT ANALYSIS

3.1 OVERVIEW OF ECONOMIC IMPACT ANALYSIS

In general, economic impacts are viewed as being restricted to quantitative, well-established measures of economic activity. The most commonly used of these measures are output, GDP, employment and government revenue:

- **Output** is the total gross value of goods and services produced by a given company or industry measured by the price paid to the producer. This is the broadest measure of economic activity.
- **Gross Domestic Product (GDP)**, or value added, refers to the additional value of a good or service over the cost of inputs used to produce it from the previous stage of production. Thus, GDP is equal to the unduplicated value of the goods and services produced.
- **Employment** is the number of jobs created. Employment is measured in terms of full-time equivalents (FTEs). One FTE is equivalent to one person working full-time for one year or one person-year of employment.
- **Government Revenues** are the total amount of revenues generated for different levels of government. Revenues arise from personal income taxes, indirect taxes less subsidies, corporate income taxes, taxes on products and royalties. Please note that because tax revenues can frequently change due to modifications in tax policy, the government revenues in this report are estimates only and subject to change. They should be viewed as approximate in nature.

Economic impacts may be estimated at the direct, indirect and induced levels:

- **Direct impacts** are due to changes that occur in "front-end" businesses that would initially receive expenditures and operating revenue as a direct consequence of the operations and activities of an industry, organization or project.
- **Indirect impacts** arise from changes in activity for suppliers of the "front-end" businesses.
- **Induced impacts** arise from shifts in spending on goods and services as a consequence of changes to the payroll of the directly and indirectly affected businesses.

To estimate the economic impacts generated by new car dealers MNP employed an input-output methodology using multipliers published by Statistics Canada. Input-output modeling is a widely used and widely accepted approach, making it recognizable by many different stakeholders and audiences. The structure of the approach also facilitates easy comparisons between reported results for different industries and organizations.

Appendix A provides a more detail description of MNP's approach to estimating the economic impacts.

3.2 ECONOMIC IMPACT OF OPERATIONS

The operations of new car dealers impact the national economy through direct expenditures on goods and services (e.g., operating supplies, professional services, advertising, etc.), the employment of staff and the generation of tax revenues for local, provincial and federal governments.

As shown in Table 3, total revenues generated by new car dealers were approximately \$151.5 billion in 2022. Operations in Ontario accounted for approximately 40 percent of the revenues, followed by Quebec (23 percent), Alberta (13 percent) and British Columbia (11 percent). Operations in the rest of Canada accounted for 18 percent of total revenues.

Table 3: Estimated Total Revenue of New Car Dealers in Canada, 2022

Province	Revenue (\$ millions)	Percentage of Total Revenue
Ontario	\$59,778	39.2%
Quebec	\$35,478	23.2%
Alberta	\$20,388	13.4%
British Columbia	\$17,049	11.2%
Saskatchewan	\$4,796	3.2%
Manitoba	\$4,839	3.2%
New Brunswick	\$3,423	2.3%
Nova Scotia	\$3,208	2.1%
Newfoundland and Labrador	\$2,058	1.4%
Prince Edward Island	\$534	0.4%
Territories	\$254	0.2%
Total	\$152,060	100%

Source: Statistics Canada. Table 20-10-0066-01 Annual retail trade survey - financial estimates and Financial Performance Data (2020), Financial Performance Data (2021), Innovation, Science and Economic Development Canada for New Car Dealers (NAICS 44111)

The total expenditures by new car dealers in Canada were estimated to be approximately \$146 billion in 2022. As shown in Table 4 the largest category of expenditure was cost of goods for resale (e.g., vehicles, parts, and accessories), followed by expenditures on salaries, wages and benefits, and rent.

Table 4: Estimated Total Spending of New Car Dealers in Canada, 2022

Expenditure Category	Spending (\$ millions)	Percentage of Total Expenditure
Cost of goods for resale	\$129,163	88.0%
Salaries, wages and benefits	\$8,971	6.1%
Rent	\$1,582	1.1%
Advertising and promotions	\$995	0.7%
Amortization	\$690	0.5%
Repairs and maintenance	\$606	0.4%
Professional and business fees	\$501	0.3%
Utilities and telephone/telecommunication	\$499	0.3%
Interest	\$429	0.3%
Insurance	\$323	0.2%
Delivery, shipping and warehouse	\$168	0.1%
Other expenses	\$2,822	1.9%
Total	\$146,749	100%

Source: Statistics Canada. Table 20-10-0066-01 Annual retail trade survey – financial estimates and Financial Performance Data (2020), Financial Performance Data (2021), Innovation, Science and Economic Development Canada for New Car Dealers (NAICS 44111)

New car dealers are classified as being in the retail trade industry. Retail trade is a service industry, and the economic impacts of service industries are based on the activities involved in providing services to sell goods. Consequently, the manufacturing of the goods sold by a retailer are not included in the overall economic impact. To account for this, expenditures on goods for resale were excluded from the calculation of economic impacts.

Table 5 shows the estimated total economic impacts of new car dealers in Canada in 2022. Canadian new car dealers were estimated to generate:

- \$46.1 billion of total output, consisting of direct output of \$22.6 billion and \$23.5 billion of indirect and induced output.
- \$28.1 billion of total GDP consisting of \$14.7 billion in direct GDP and \$13.4 billion of indirect and induced GDP.
- 278,620 total FTEs consisting of 167,790 direct FTEs and 110,830 indirect and induced FTEs.
- \$6.3 billion in total revenue for all three levels of government consisting of \$2.5 billion in direct revenues and \$3.7 billion of indirect and induced revenues.

Appendix B provides a breakdown of economic impacts by province.

Table 5: Estimated Total Economic Impacts of New Car Dealers in Canada, 2022¹²

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$22,566	\$14,718	167,790	\$1,200	\$1,075	\$256
Indirect and Induced	\$23,541	\$13,392	110,830	\$1,410	\$1,711	\$625
Total	\$46,107	\$28,110	278,620	\$2,610	\$2,786	\$881

¹²The economic impacts for Canada include total impacts for all provinces and territories.



3.3 ECONOMIC IMPACTS OF OPERATIONS BY PROVINCE

The figures below (Figure 4 through Figure 7) summarize the direct, indirect and induced economic impacts generated by new car dealers' operations in each of Canada's 10 provinces. Please note that the economic impacts reported in these figures do not include the economic impacts for Nunavut, Yukon and the Northwest Territories. For this reason, there may be some variance in the total numbers reported in the following figures compared with other tables in the report, namely Table 5 and Table 6 . Direct impacts are solely generated in the province where operations are located. Indirect and induced economic impacts are generated in both the province where operations are located and in other provinces due to supply chain linkages. For example, professional services (i.e., legal, marketing, etc.) might be procured from outside the province of operation.

For most provinces, between 50 and 90 percent of the indirect and induced impacts are generated within the province. Ontario and BC report the largest share of the intraprovincial economic impacts ranging between 89 to 94 percent. Detailed economic impacts by province are provided in Appendix B.

Figure 4 shows the distribution of the estimated total output generated by new car dealers in 2022 by region. Approximately 38 percent of the output was generated in Ontario, followed by Quebec (23 percent), Alberta (14 percent) and British Columbia (12 percent).

Figure 4: Estimated Economic Impacts by Province/Region of Operation – Output (\$ million) – 2022

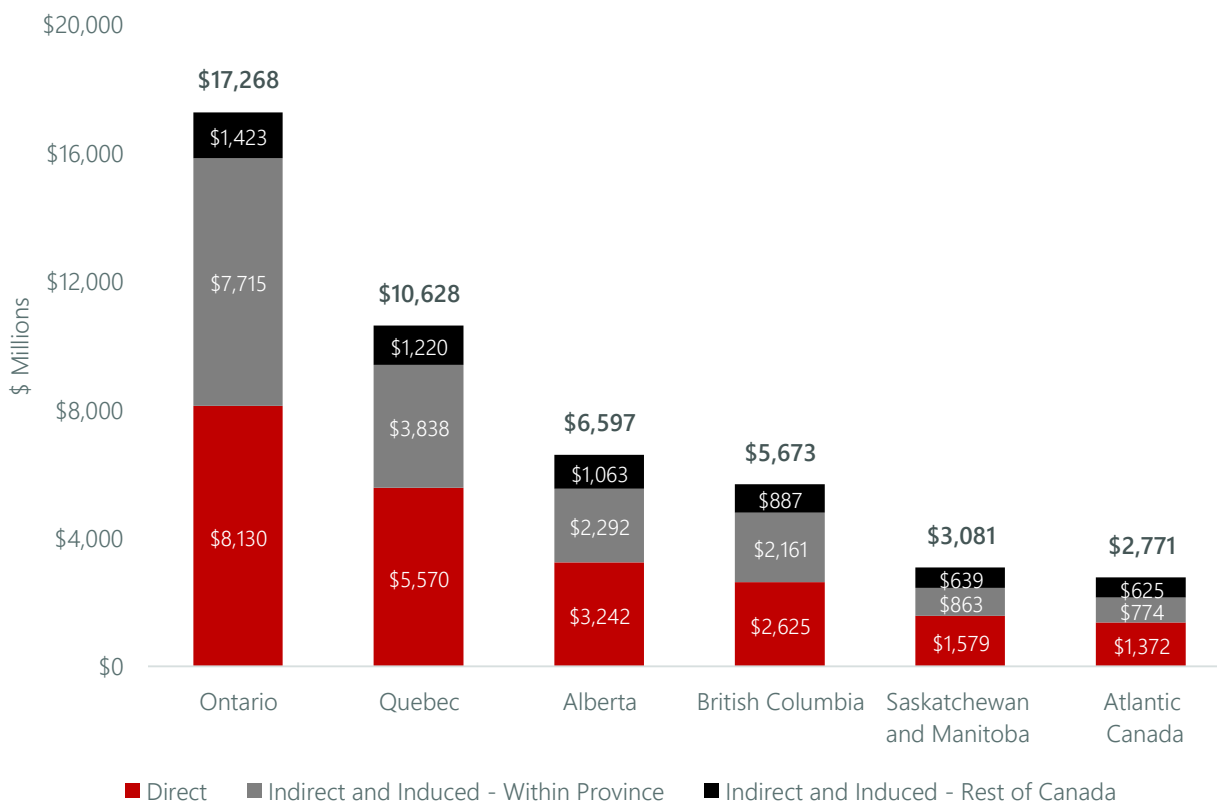


Figure 5 shows the distribution of the total GDP contributions produced by new car dealers in 2022 by region. Direct impacts account for around a half of the total GDP impacts in all provinces, ranging between 48 and 57 percent of the total.

Figure 5: Estimated Economic Impacts by Province/Region of Operation – GDP (\$ million) – 2022

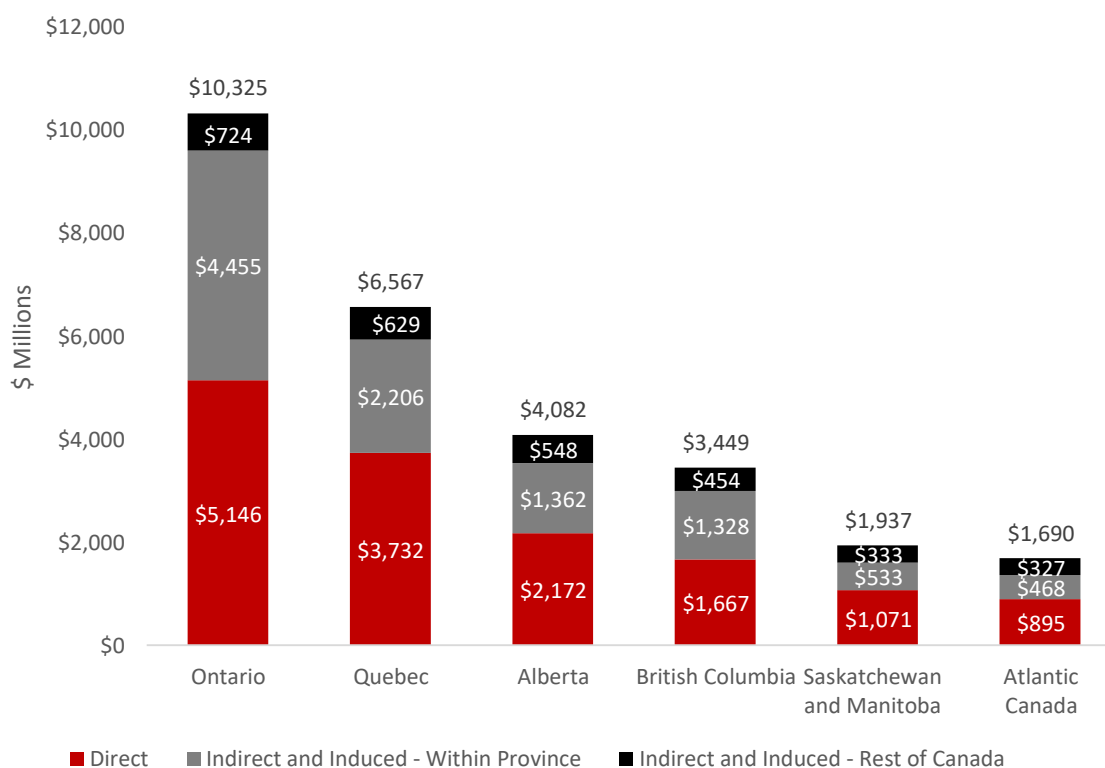


Figure 6 shows the distribution of total estimated employment created by new car dealers in 2022 by region. In 2022, approximately 278,200 FTEs were estimated to be created. Around 40 percent of these positions (106,020) were based in Ontario, while Quebec accounts for almost one quarter (23 percent) of jobs created. The remaining 109,320 jobs were across the rest of Canada. Direct employment accounted for 167,560 jobs or 60 percent of the total.

Figure 6: Estimated Economic Impacts by Province/Region of Operation – Employment (FTEs) – 2022

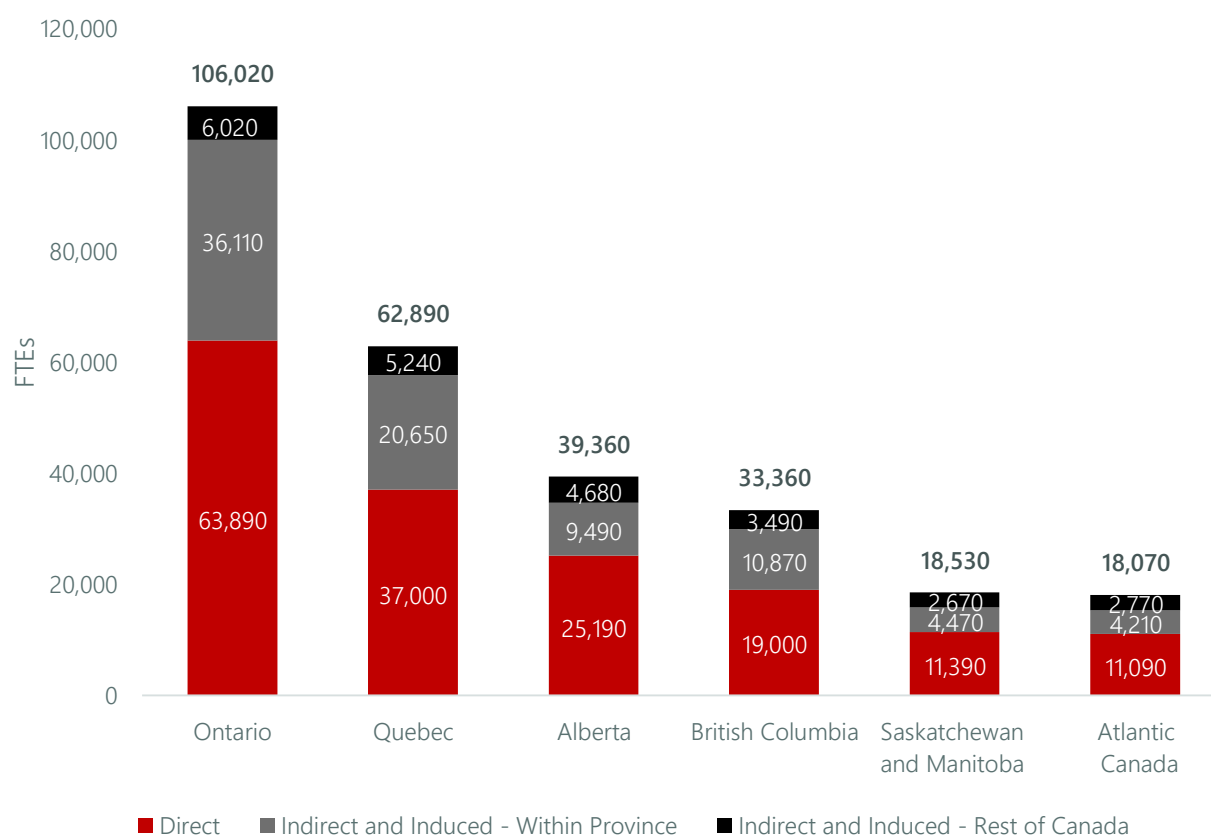


Figure 7 shows the distribution of total taxes generated by new car dealers' operations in 2022 by region. New car dealers contributed a total of \$6.3 billion in taxes to all three levels of government. Most taxes were generated indirectly, accounting for 60 percent of the total. Ontario accounted for most of the contributions (38 percent).

Figure 7: Estimated Economic Impacts by Province/Region of Operation – Taxes (\$ million) – 2022

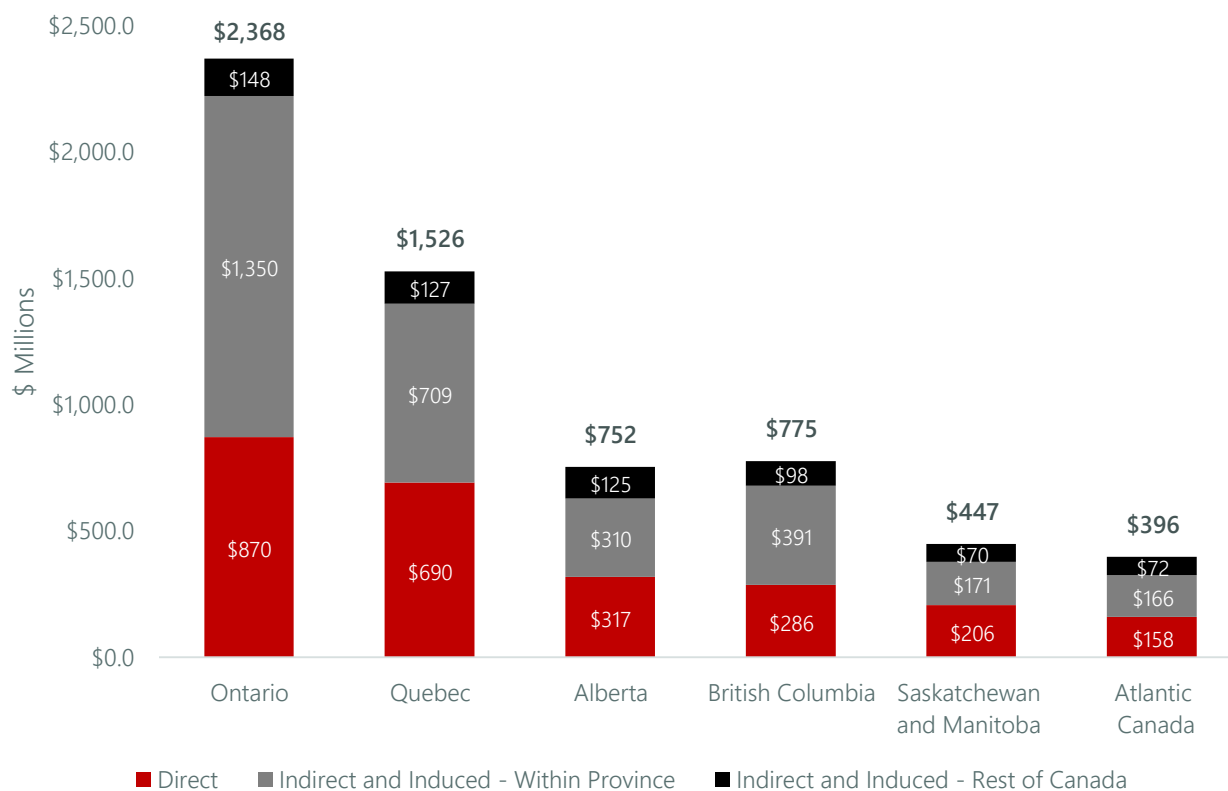


Table 6 below summarizes the total direct, indirect and induced estimated impacts generated by new car dealers in each province. Ontario accounted for the largest share of impacts (between 33 and 43 percent), followed by Quebec (between 19 to 30 percent). Alberta and British Columbia each account for approximately 10 to 15 percent of the national impact. Operations in each of the other provinces accounted for approximately one percent to four percent of the impacts.

Table 6: Estimated Total Economic Impacts of New Car Dealers in Canada by Province, 2022

Province	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Ontario	\$17,268	\$10,325	106,020	\$1,061	\$931	\$376
Quebec	\$10,628	\$6,567	62,890	\$488	\$829	\$209
Alberta	\$6,597	\$4,082	39,360	\$373	\$272	\$107
British Columbia	\$5,673	\$3,449	33,360	\$336	\$350	\$89
Manitoba	\$1,564	\$968	9,830	\$99	\$106	\$34
Saskatchewan	\$1,517	\$969	8,700	\$93	\$99	\$16
Nova Scotia	\$986	\$596	6,640	\$53	\$69	\$13
New Brunswick	\$1,082	\$663	7,620	\$64	\$75	\$27
Newfoundland and Labrador	\$577	\$356	3,060	\$32	\$39	\$7
Prince Edward Island	\$126	\$75	750	\$7.	\$9	\$1.2
Territories	\$89	\$60	390	\$4.0	\$7.0	\$1.8
Total	\$46,107	\$28,110	278,620	\$2,610	\$2,786	\$881

3.4 TOTAL ECONOMIC IMPACTS OF INVESTMENTS IN NEW AND EXISTING FACILITIES

In addition to spending on operations, new car dealers spend a substantial amount on new dealership construction and renovation each year. To estimate the economic impacts of that expenditure, a combination of primary and secondary data were used. A survey of members administered by the CADA gathered information on construction and renovation expenditures over the period 2018 to 2022. In

addition, information from Statistics Canada's Building Permits data for car dealers was used to develop estimates of construction and renovation expenditures.

It was estimated that new car dealers in Canada invested approximately \$1.0 billion annually in new and existing facilities between 2018 and 2022. This consisted of \$830 million of construction expenditures and \$170 million of renovation expenditures.

As shown in Table 7 expenditures in Ontario accounted for approximately 30 percent of the total investment, followed by Quebec (23 percent), Alberta (17 percent) and British Columbia (14 percent). Expenditures in rest of Canada account for 16 percent of total investment.

Table 7: Estimated Annual Construction and Renovation Expenditures of New Car Dealers in Canada

Province	Annual Construction Expenditures (\$ millions)	Annual Renovation Expenditures (\$ millions)	Total Expenditures (\$ millions)	Percentage of Total Expenditures
Ontario	\$273	\$32	\$305	30.5%
Quebec	\$138	\$89	\$227	22.7%
Alberta	\$158	\$13	\$171	17.0%
British Columbia	\$115	\$28	\$143	14.2%
Manitoba	\$45	\$3	\$48	4.8%
Saskatchewan	\$33	\$4	\$37	3.7%
New Brunswick	\$28	\$0.5	\$28.5	2.9%
Nova Scotia	\$19.6	\$0.6	\$20.2	2.0%
Newfoundland and Labrador	\$17	\$1	\$18	1.8%
Prince Edward Island	\$3.5	\$0.1	\$3.6	0.4%
Total	\$830.1	\$171.2	\$1,001.3	100%

Table 8 shows the estimated annual economic impacts of construction and renovation expenditures by new car dealers. Between 2018 and 2022, new car dealers were estimated to generate:

- \$2.1 billion of total output, consisting of direct output of \$1 billion and \$1.1 billion of indirect and induced output.

- \$1 billion of total GDP consisting of \$460 million in direct GDP and \$578 million of indirect and induced GDP.
- 8,590 total FTEs consisting of 3,750 direct FTEs and 4,840 indirect and induced FTEs.
- \$244 million in total revenue for all three levels of government consisting of \$105 million in direct revenues and \$139 million of indirect and induced revenues.

Appendix B provides a breakdown of economic impacts by province.

Table 8: Total Estimated Economic Impacts of Investment in New and Existing Facilities

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$1,001	\$460	3,750	\$35	\$41	\$29
Indirect and Induced	\$1,072	\$578	4,840	\$56	\$63	\$20
Total	\$2,073	\$1,038	8,590	\$91	\$104	\$49

3.5 ECONOMIC IMPACTS OF INVESTMENTS IN NEW AND EXISTING FACILITIES BY PROVINCE

The figures below (Figure 8 through Figure 11) summarize the direct, indirect and induced economic impacts generated by investments in new and existing facilities in each of Canada's 10 provinces. Direct impacts are solely generated in the province where expenditures take place. Indirect and induced economic impacts are generated in both the province where investments take place and in other provinces due to supply chain linkages. For example, professional services (i.e., engineering, architecture, etc.) might be procured from outside the province where the dealership is located. For most provinces, around 70 to 90 percent of the indirect and induced impacts are generated within the province. Ontario and Quebec report the biggest share of the intraprovincial economic impacts ranging between 86 to 96 percent.

Detailed economic impacts by province are provided in Appendix B.

Figure 8 shows the distribution of the estimated total output generated by investments in new and existing facilities by region. Approximately 29 percent of the output was generated in Ontario, followed by Quebec (23 percent), Alberta (18 percent) and British Columbia (14 percent).

Figure 8: Estimated Annual Economic Impacts by Province/Region of Investments in New and Existing Facilities – Output (\$ million)

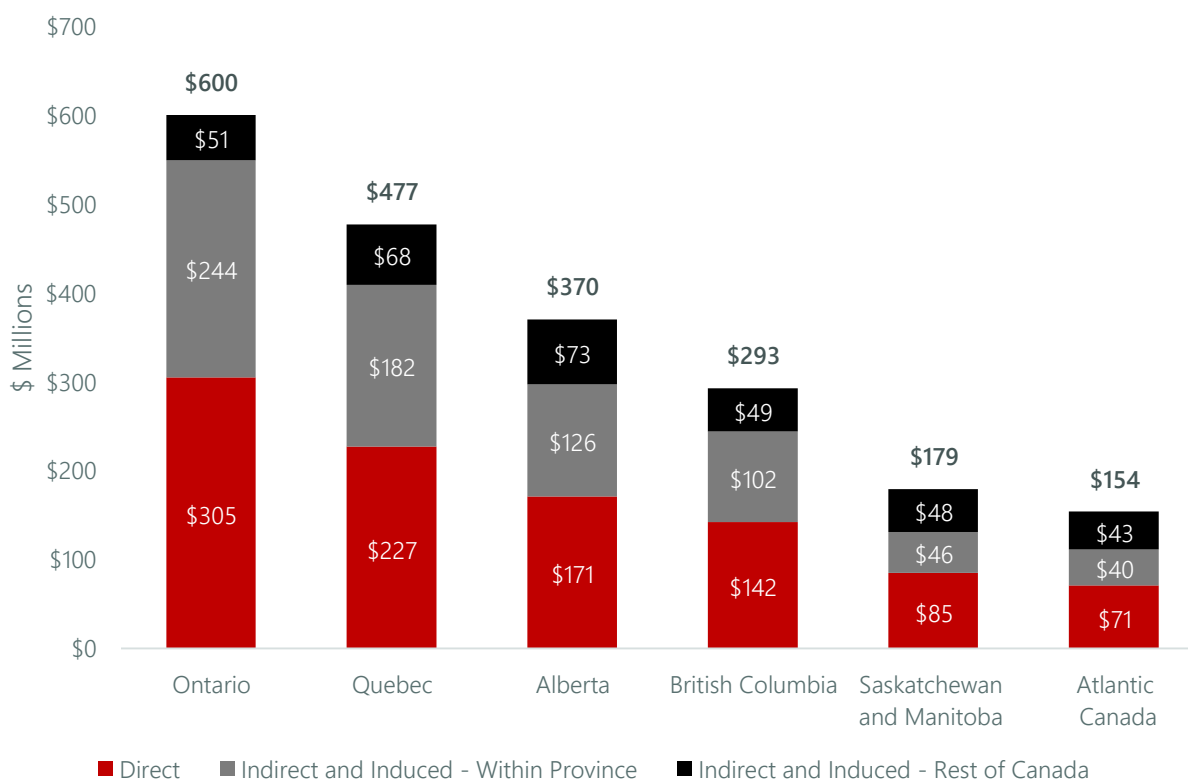


Figure 9 shows the distribution of the total GDP contributions generated by investments in new and existing facilities in 2022 by region.

Figure 9: Estimated Annual Economic Impacts by Province/Region of Investments in New and Existing Facilities – GDP (\$ million)

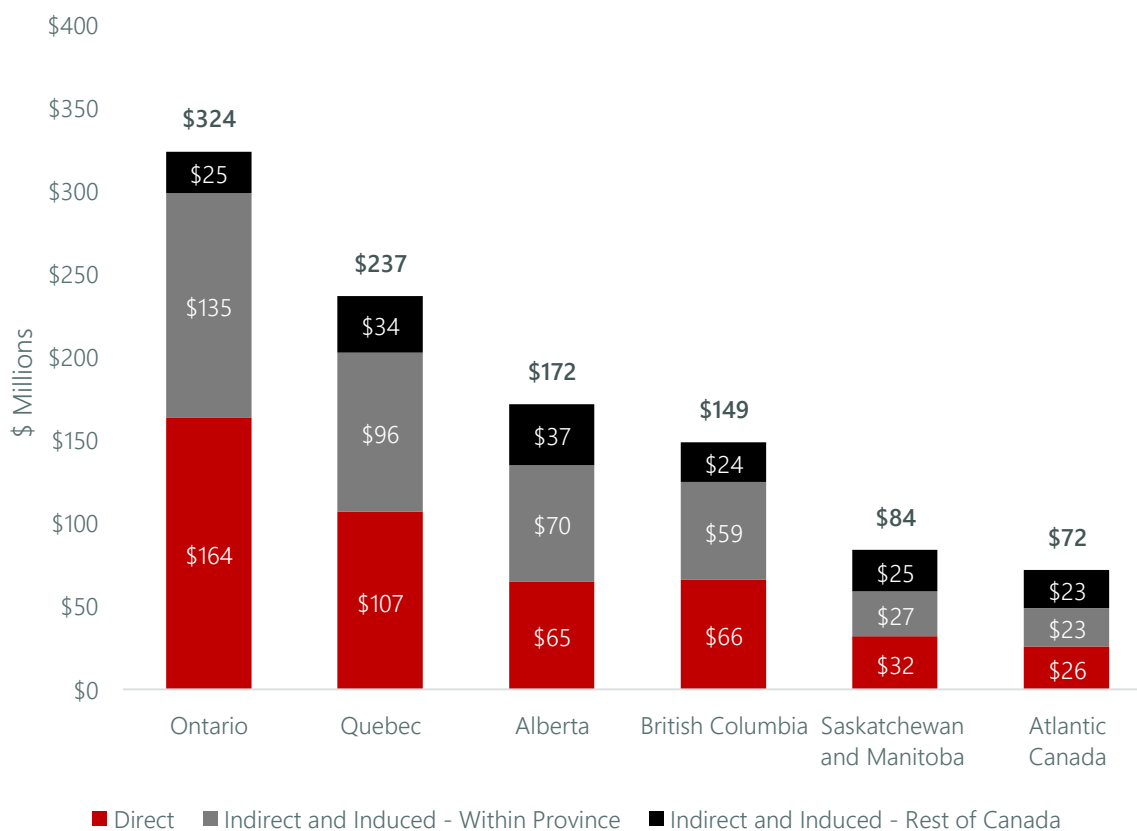


Figure 10 shows the distribution of total estimated employment created by investments in new and existing facilities by region. Between 2018 and 2022 approximately 8,590 FTEs were estimated to be created annually. Around 30 percent of these jobs (2,600) were in Ontario, while Quebec accounted for almost one quarter (24 percent) of the jobs. The remaining 3,960 jobs were across the rest of Canada. Direct employment accounted for 3,750 jobs or 47 percent of the total.

Figure 10: Estimated Annual Economic Impacts by Province/Region of Investments in New and Existing Facilities – Employment (FTEs)

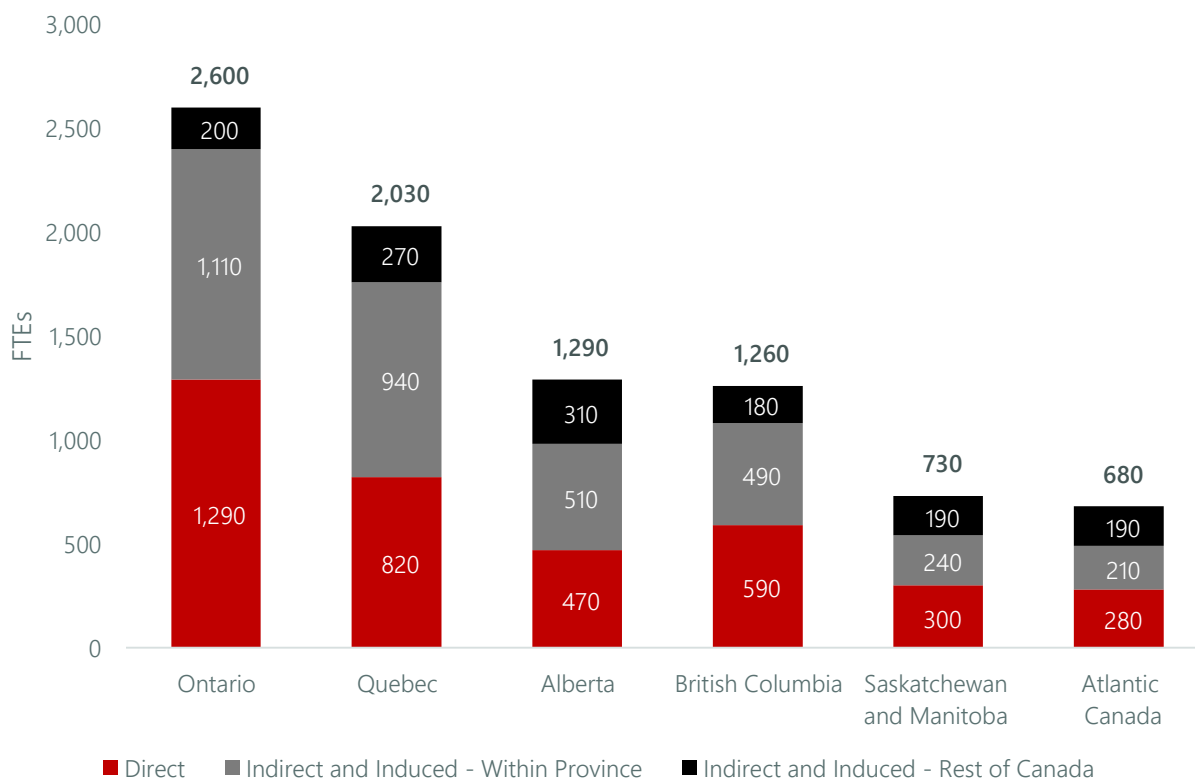


Figure 11 shows the distribution of total taxes generated by investments of new car dealers by region. The investments contributed a total of \$244.2 million in taxes to all three levels of government annually. Most taxes were generated indirectly, accounting for 57 percent of the total. Ontario accounted for most of the contributions (33 percent).

Figure 11: Estimated Annual Economic Impacts by Province/Region of Investment – Taxes (\$ million)

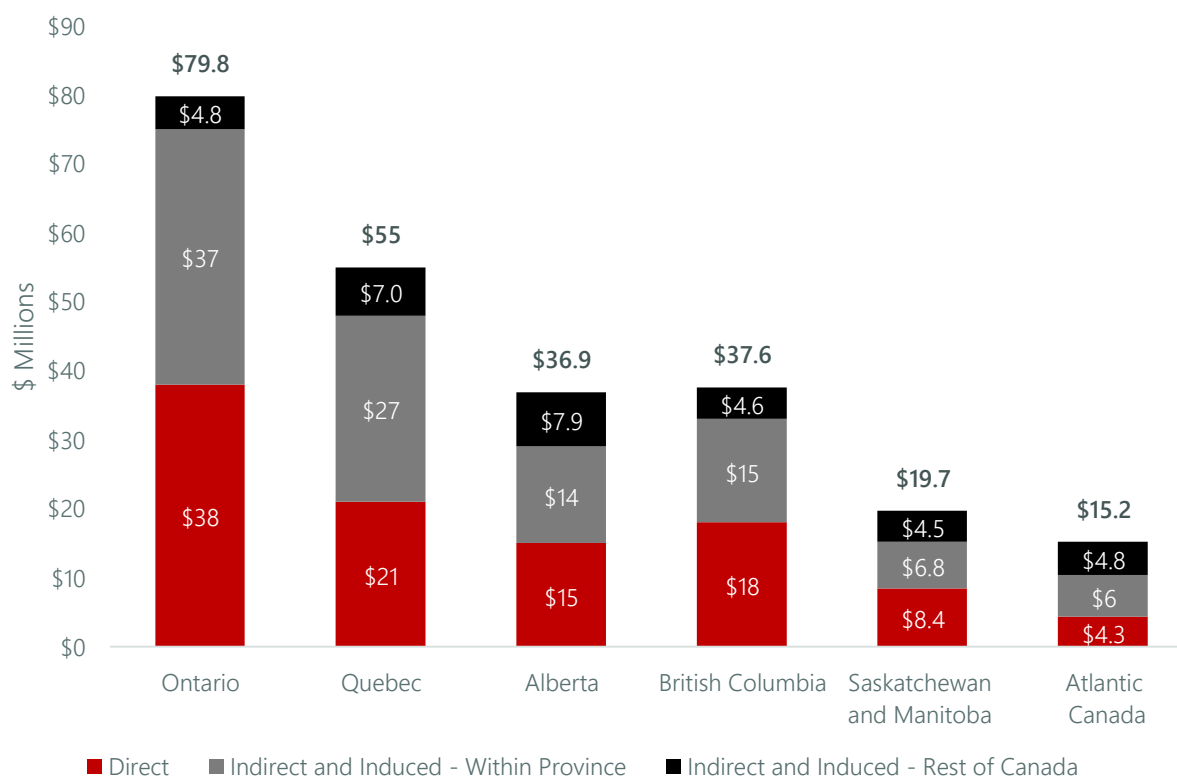


Table 9 summarizes the total direct, indirect and induced estimated impacts generated by investments of new car dealers in each province. Ontario accounted for the largest share of impacts (between 27 and 44 percent), followed by Quebec (between 18 to 28 percent). Alberta and British Columbia account for a similar share of total impacts, comprising approximately 12 to 18 percent of the national impact. Operations in all other provinces accounted for approximately 1 percent to 6 percent of the impacts.

Table 9: Estimated Total Economic Impacts of Investment in New and Existing Facilities by New Car Dealers in Canada by Province

Province	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Ontario	\$600	\$324	\$2,600	\$30	\$29	\$20.8
Quebec	\$477	\$237	\$2,030	\$17	\$29	\$9
Alberta	\$370	\$172	\$1,290	\$16	\$13	\$7.9
British Columbia	\$293	\$149	\$1,260	\$14	\$17	\$6.6
Manitoba	\$104	\$46	\$400	\$5	\$5	\$1.5
Saskatchewan	\$75	\$38	\$330	\$3	\$3.9	\$1.3
New Brunswick	\$62	\$29	\$290	\$2.7	\$2.7	\$0.6
Nova Scotia	\$45	\$21	\$200	\$1.8	\$2.1	\$0.5
Newfoundland and Labrador	\$39	\$18	\$140	\$1.6	\$1.9	\$0.5
Prince Edward Island	\$8	\$4	\$50	\$0.3	\$0.4	\$0.04
Total	\$2,073	\$1,038	\$8,590	\$91.4	\$104	\$48.7

3.4 WORKFORCE PROFILE

The majority of people employed at new car dealerships in Canada are males at both a national and provincial level. Men comprised approximately 77 percent of active employees at new car dealers in 2021. The percentage of females has increased by less than two percent since 2016.¹³ The representation of females varies by occupation with Finance and Insurance managers (F&I) recording the highest share of women at 43 percent, followed by service advisors at 31 percent.

As of 2021, the median age of all active Canadian dealership employees was 38.8 years. The composition of the workforce is gradually shifting with more employees aged 25 years old or younger being hired. Most employees (40 percent) of new car dealers in Canada are between 26 and 41 years old.¹⁴

New car dealers provide stable long-term employment for skilled and unskilled labour. Skilled employment includes tradespeople, salespeople, finance officers, managers, administrative staff, marketing staff, and professionals. Unskilled and semi-skilled employment includes detailers, lot people, drivers, delivery people, and shop helpers. Approximately 56 percent of the workforce is employed in skilled positions requiring a post-secondary credential, professional certification, or significant experience.





Table 10 provides an overview of the workforce at new car dealers.



¹³ Canadian Automobile Dealers Association. 2022 Industry Report.

¹⁴ Ibid.

Table 10: Workforce at New Car Dealers

Skills Level	Category	Description	Share of Workforce
Skilled	Parts and Service 	This group of occupations includes skilled trade workers and technicians responsible for the maintenance and repair of vehicles, as well as support staff. Skilled positions include parts people, service advisors, automotive service technicians, collision repair technicians, glass technicians, automotive painters, automotive refinishing prep technicians, and estimators. Support positions include shop helpers, detailers, couriers, and delivery drivers.	43%
	Management and Administration 	This group of occupations includes operations and strategic management positions, as well as marketing, legal and IT. Operations management positions include fixed operations managers, parts managers, and service managers. Strategic management positions include controllers and general managers.	13%
Semi-skilled	Sales and Customer Service 	This group of occupations includes receptionists, sales, finance and leasing, and customer service representatives who are responsible for greeting and addressing customer queries. Sales and customer service representatives must maintain industry product knowledge and have excellent communication skills. Education requirements for these positions vary from high school to a bachelor's degree.	36%
Unskilled	Other Occupations 	This group of occupations provide general support for the day-to-day operations of the dealerships. Positions include building and lot maintenance personnel, inventory clerks, shuttle and parts drivers, and car wash/vehicle detailers.	8%

3.5 COMPARISON OF ECONOMIC IMPACTS WITH OTHER INDUSTRIES

To provide perspective on the size of the economic impacts of new car dealers in Canada, it is useful to compare the impacts with those created by other industries and initiatives. Three such industries are:

- **New Home Construction:** In 2022, the operations of Canada's new car dealers were estimated to have generated direct and indirect employment of 278,620 FTEs. This is equivalent to the number of direct and indirect jobs created through the construction of approximately 130,000 new homes in Canada. This equates to 50 percent of new home starts in 2022.¹⁵
- **Oil and Gas Production:** The total direct and indirect employment from the operations of new car dealers in Canada 2022 is equivalent to approximately 70 percent of the total employment generated by the oil and gas industry in 2020.¹⁶
- **Canola Production:** The total direct and indirect employment from the operations of new car dealers in Canada 2022 is equivalent to the average employment generated through the production of 30 million seeded canola acres. This is 1.35 times the amount seeded annually. For the years 2017 through 2019, an average of 22.3 million acres of canola was planted in Canada.^{17,18}

¹⁵ Canadian Home Builders' Association. Residential Construction in Canada, Economic Performance Review 2022. Retrieved from <https://www.chba.ca/impacts>

¹⁶ Canadian Association of petroleum Producers. Retrieved from <https://www.capp.ca/economy/canadian-economic-contribution/>

¹⁷ Canola Council of Canada. Retrieved from <https://www.canolacouncil.org/markets-stats/production/>

¹⁸ The Economic Impact of Canola on Canadian Economy: 2020 Update. Retrieved from https://www.canolacouncil.org/download/131/economic-impact/17818/economic-impact-report-canada_december-2020

4. SOCIAL AND COMMUNITY CONTRIBUTIONS

4.1 British Columbia Case Study

New car dealerships in British Columbia are committed to supporting their local communities through various philanthropic ventures. These contributions, which mirror the values and commitments of the dealerships, signify their deep engagement with the community. Examples of how new car dealerships are engaging with their communities are:

- Kelowna Toyota has established itself as a dedicated community supporter, with a history of substantial contributions to local charities. In 2022, the dealership continued this tradition by donating over \$200,000 to various organizations.¹⁹ Past support provided to the community includes funding the first year of the Mental Health and Wellness Program in Kelowna with a \$20,000 donation in 2019.²⁰ The dealership also has ongoing involvement with Mamas for Mamas—a national charity aiding mothers and children in need.
- OpenRoad Auto Group has taken a multifaceted approach to community support. This is reflected in the creation of the OpenRoad Foundation, which focuses on environmental sustainability, community welfare, and educational advancement. Among other charitable actions in 2023, the group also donated to the Volunteer Cancer Drivers Society, an organization dedicated to providing free and reliable transportation for cancer patients in need within the Greater Vancouver and Fraser Valley regions.²¹
- Capilano Volkswagen has demonstrated their commitment to health by sponsoring the Cypress Challenge in multiple years. Their \$150,000 donation has powered an event that rallies more than 600 cyclists to ascend Cypress Mountain, and in 2023, this initiative alone raised over \$418,000 for pancreatic cancer research and patient care.²²

These initiatives are just a few examples of the significant contributions new car dealerships make to their communities.

4.2 Alberta Case Study

Car dealerships are part of the fabric of communities across Alberta. They provide support to local organizations and the community in many different ways. When natural disasters strike car dealerships have been among the first to step up to provide crucial support. During the Fort McMurray wildfire In

¹⁹ NowMedia. (2023, July 20). Toyota Charity Spotlight - Final Cut (Updated) [Video]. Vimeo. <https://vimeo.com/847133559>

²⁰ Mamas for Mamas. (2019, October 10). Kelowna Toyota. Retrieved from <https://www.mamasformamas.org/kelowna-toyota/>

²¹ Ginsca, M. (2023, July 19). OpenRoad Auto Group announces the OpenRoad Foundation. OpenRoad Auto Group Blog. Retrieved from <https://blog.openroadautogroup.com/openroad-auto-group-announces-the-openroad-foundation/>

²² BC Cancer Foundation. (n.d.). The Capilano Volkswagen Cypress Challenge presented by Glotman Simpson, benefiting the BC Cancer Foundation; Cypress Challenge | BC Cancer Foundation. Cypress Challenge. Retrieved from <https://cypresschallenge.ca/>

2016, despite facing their own challenges, dealerships like Northstar Ford Lincoln, Summit GM, Noral Toyota, and Legacy Dodge became pillars of strength for the community, prioritizing community service. Northstar Ford Lincoln's dealer principal, Marty Giles, led a team to establish a service operation for first-responder vehicles, maintaining the functionality of vehicles that had been operating nonstop in the heavy smoke. Summit GM converted their showroom into a hub for insurance personnel to assist residents with their claims, while Noral Toyota focused on rapidly preparing customer vehicles for evacuation.²³

Supporting communities extends beyond just immediate disaster response. Initiatives like #Oil4Hope, kickstarted by Davis Dodge in Fort Macleod, encapsulated the spirit of collective healing and rebuilding. They initiated a challenge, modelled after the ice bucket challenge, in which they nominated other dealerships to donate to the Red Cross. Rather than ice, the challenge involved symbolically pouring vegetable oil over participants' heads to encourage widespread participation.²⁴

In 2023, Jack Carter Chevrolet Buick GMC Ltd. continued the tradition of support by donating four vintage vehicles for auction, with proceeds going to the Canadian Red Cross wildfire appeals. The offerings included a 1972 Chevrolet Cheyenne Super, a 1989 Jaguar XJ12, a 1966 Ford T Bird, and a 1968 Suzuki Cobra T500, each with its unique appeal and history. These acts of generosity reflect not just a commitment to immediate relief efforts but also the long-term recovery and emotional well-being of the communities affected by the wildfires.²⁵

In the network of community resilience and recovery, Alberta's car dealerships stand out not just as commercial entities, but as essential supporters of the province's social and economic well-being. Their actions in times of crisis, particularly noticeable during the wildfires, go beyond standard business practices, highlighting a deep commitment to the communities and individuals they serve.

4.3 Saskatchewan Case Study

Hockey is a central aspect of life in Saskatchewan. The province is renowned for producing hockey talent, including NHL legends like Gordie Howe, Bryan Trottier and Patrick Marleau. This tradition of excellence continues to inspire young players throughout the province.

All great hockey players start out playing in minor hockey leagues which play a vital role in communities across Saskatchewan. Minor hockey is largely volunteer run and dependent on the support of

²³ Pegg, H. (2017, May 29). Dealers still picking up the pieces from Fort McMurray fire. Automotive News Canada. Retrieved from <https://canada.autonews.com/article/20170529/CANADA/170529800/dealers-still-picking-up-the-pieces-from-fort-mcmurray-fire>

²⁴ Irvine, S. (2016, May 10). Car dealerships start #Oil4Hope in support of Fort McMurray. Global News. <https://globalnews.ca/news/2693112/car-dealerships-start-oil4hope-in-support-of-fort-mcmurray/>

²⁵ Sandra. (2023, September 21). Sneak a Peek: Local Car Dealership Donates BIG to Wildfire Recovery. Donate A Car Canada. <https://donatecar.ca/car-dealership/>

community members and organizations. Local dealerships provide sponsorship and other forms of support that allow hockey to continue to flourish at the grassroots level. Examples of how dealerships support Canada's national winter sport include:

- Merlin Ford sponsors the Saskatoon Blades, a major junior hockey team, and has also been a long-time sponsor of the female hockey legend Hayley Wickenheiser.²⁶
- The Wyant Group donated \$500,000 to the University of Saskatchewan's Home Ice Campaign, directly contributing to the creation of Merlis Belsher Place.²⁷ This state-of-the-art recreation facility includes two ice surfaces and is home to the University of Saskatchewan's hockey teams as well as the Saskatoon Minor Hockey Association (SMHA).²⁸ SMHA provides a positive and inclusive hockey experience for young players aged 5 to 17.
- Capital GMC's sponsorship of the Saskatchewan Junior Hockey League.²⁹
- Moose Jaw Ford's support of the Moose Jaw Warriors – a major junior ice hockey team in the Western Hockey League (WHL).³⁰
- The Melfort Mustangs, a junior 'A' ice hockey team, receiving backing from Thomas Motors, and Cheyenne GM, among others.³¹

These dealerships, by investing in teams, facilities, and individual athletes, demonstrate a deep commitment to the community and the sport. Their support helps ensure that hockey remains accessible and enjoyable for everyone, from aspiring young players to professional athletes. Dealerships engagement in the local community and support for local initiatives also contributes to economic growth and prosperity. Plewis Automotive Group (Plewis) has six locations in three communities. Plewis understands that a thriving business cannot exist in isolation. By actively participating in community events, sponsoring local organizations, and supporting charitable causes, the company has fostered a sense of togetherness and unity. This community-centric approach has not only enhanced the quality of life for residents but also created a positive environment for economic growth. One of the most significant economic benefits of community involvement and sponsorships is the direct impact on local businesses. The Plewis Automotive Group's support for community events and organizations has helped generate increased foot traffic and sales for local merchants. Plewis is the presenting sponsors for the City of Swift Current's vibrant summer Market Square, where local vendors

²⁶ Gentile, P. (2017, February 15). Stars in Cars: Hayley Wickenheiser. AutoTrader. Retrieved from <https://www.autotrader.ca/editorial/20170215/stars-in-cars-hayley-wickenheiser/>

²⁷ Wyant Group. (n.d.). The spirit of giving. Retrieved October 25, 2023, from <https://wyantgroup.com/ourcommunity/>

²⁸ Merlis Belsher Place. About us. Retrieved November 6, 2023 from <https://merlisbelsherplace.ca/facility/>

²⁹ Saskatchewan Junior Hockey League. (n.d.). Homepage sponsors. Retrieved October 25, 2023, from <https://www.sjhl.ca/>

³⁰ Moose Jaw Ford. (n.d.). Community. Retrieved October 25, 2023, from <https://www.moosejawfordsales.com/community/>

³¹ Melfort Mustangs. (n.d.). Corporate sponsors. Retrieved October 25, 2023, from <https://www.melfortmustangs.com/corporate-sponsors>

and community come together to enjoy food, music and shopping every Saturday throughout the summer. By attracting visitors and residents to these events, the company has played a vital role in stimulating economic activity, benefiting not only the Plewis Automotive Group but also the wider business community.³²

The Plewis' commitment to community involvement has also translated into job creation. Its philanthropic involvement has also fostered a positive reputation in the community as an employer, and as such it benefits from attracting employees with similar values to our own resulting in strong internal culture, lower turnover, and long term employees. This fosters economic employment stability within both the organization and the community.

As businesses continue to recognize the power of community involvement, Plewis provides an example of how corporate social responsibility can drive economic positivity and create a better future for all.

4.4 Manitoba Case Study

The Indigenous population in Manitoba accounts for roughly 18 percent of the province's total population.³³ Dealer groups in Manitoba are actively involved in various initiatives that support Indigenous peoples and increase the participation of Indigenous people in the labour market.

Examples of the type of supports provided to Indigenous peoples are:

- The Vickar group contributes to a scholarship for students attending Yellowquill College and the Manitoba Institute of Trades and Technology (MITT).³⁴
- Birchwood Automotive Group not only supports the University of Manitoba Indigenous Commerce Students (UMICS) but also actively engages with Indigenous communities for recruitment, thereby fostering opportunities for education and employment.³⁵

Beyond educational support, dealerships across Manitoba acknowledge and participate in cultural initiatives, such as the Truth and Reconciliation National Day. One such example is the Crown Acura store in Winnipeg which donated \$10 for each employee who donned an orange shirt on September 29 and 30, 2023, reflecting a commitment to cultural recognition and support.

³² Plewis Automotive Group

³³ Statistics Canada. (n.d.). Statistics on Indigenous Peoples. Retrieved October 23, 2023, from https://www.statcan.gc.ca/en/subjects-start/indigenous_peoples

³⁴ Southern Chiefs' Organization. (2020, October 14). SCO and Vickar Automotive Group establish new scholarship fund. SCOINC. <https://scoinc.mb.ca/sco-vickar-establish-new-scholarship-fund/>

³⁵ Automotive News. (2022, January 10). Birchwood Automotive Group's diverse staff makes stronger 'family'. <https://www.autonews.com/dealers/birchwood-automotive-groups-diverse-staff-makes-stronger-family>

4.5 Ontario Case Study

With Canada experiencing an aging population, focusing on the well-being of the younger generation is not just vital for the immediate health of families but is also essential for the long-term resilience and prosperity of communities and the country. In Ontario, automotive dealerships are committed to enhancing the lives of children in their communities through contributions to various child-focused charities and initiatives. Examples of these contributions include:

- The Palladino Auto Group Golf Classic for NEO Kids, an annual golf tournament that raises funds to support paediatric care in Northeast Ontario. Proceeds from the tournament go to the NEO Kids Foundation, which purchases equipment and invests in capital and other programs providing patient care to children and youth. In 2023, the tournament raised a record \$205,000 for pediatric care and since 2015, the event has raised over \$920,000 for NEO Kids.³⁶
- Performance Auto Group has made numerous contributions to the community. Brantford Toyota not only took part in the Rotary Classic Run but also made a significant donation to Princess Elizabeth Public School through the Toyota Evergreen Learning Grounds program. Their efforts support Lansdowne Children's Centre and the Boys' and Girls' Club of Brantford, both of which provide programs for children with special needs. Further contributions from this group include Planet Ford's Silver Sponsorship at The Shining Through Centre for Children with Autism's Gala Dinner, which plays a role in funding services for autistic children across southern Ontario. Additionally, Classic Honda's sponsorship of the Flame of Hope Golf Tournament successfully raised \$3,000 for diabetic children.³⁷
- The AWIN Group of Dealerships has been a committed supporter of the Rally for Kids with Cancer for over ten years through the Rally for Kids with Cancer Scavenger Cup in Toronto. This event has raised over \$19 million for children's cancer research, treatments, and care at the Hospital for Sick Children (SickKids), which is affiliated with the University of Toronto.³⁸

These examples are just a few of the broader efforts by automotive dealerships across Ontario to enhance the lives and well-being of children facing a variety of challenges.

4.6 Quebec Case Study

Sport is an integral part of Quebec's culture. While hockey plays an outsized role in Quebec's sporting community, there are also numerous amateur sports teams and athletes. Quebec athletes claimed 12

³⁶ Sudbury.com. (2023, August 3). Palladino Auto Group Golf Classic for NEO Kids a record-breaker. Retrieved October 28, 2023, from <https://www.sudbury.com/local-news/palladino-auto-group-golf-classic-for-neo-kids-a-record-breaker-7364216>

³⁷ Performance Auto Group. (2023). Sponsorships. Retrieved October 28, 2023, from <https://www.performance.ca/sponsorships/>

³⁸ Auto World Imports Network. (n.d.). Partnerships. Retrieved October 28, 2023, from <http://awin.wpengine.com/partnerships/>

out of Canada's total of 29 medals in the 2018 PyeongChang Winter Olympics and contributed 11 out of the 23 medals won by Canada in the 2022 Beijing Winter Olympics.^{39,40} Summer sports also have a significant following. Over time soccer has been growing in popularity and has become an integral part of Montreal's lively culture.⁴¹

Support from local businesses, including car dealerships, plays a significant role in fostering this rich sporting culture. For example, HGregoire, known for its long-standing partnership with athletes and sports organizations, supports young athletes through Nez rouge Laval–Basses-Laurentides, in addition to their previous sponsorships of golfers and other athletes.⁴² Similarly, Groupe Park Avenue's recent two-year partnership with the Montreal Alouettes demonstrates the synergy between sports and local business communities.⁴³ A key factor in the decision to enter into this partnership by Group Park Avenue was the alignment of values between the two organizations and the shared commitment to invest in communities.⁴⁴

By forming partnerships with sports teams and athletes, car dealerships extend beyond their business realm, fostering local talent and enhancing community spirit. These collaborations not only provide financial backing and resources essential for the development of sports but also showcase a commitment to nurturing the aspirations of young and emerging athletes.

Dealerships also support athletes and individuals with reduced mobility. The Mobilis Foundation provides financial support to people with reduced mobility for the acquisition of an adapted vehicle, adaptations to homes, and the costs of travel required by their condition as well as sports or recreational activities specially designed for beneficiaries with a mobility-related disability.

All 145 Mobilis Corporation member dealers are involved in the Mobilis Foundation. The primary annual fundraising events are the Québec City International Auto Show Preview Benefit Evening and a golf tournament. Together these two events raise approximately \$200,000 annually. Since it was formed in 2009, the Mobilis Foundation has raised \$1.6 million and supported more than 340 individuals and organizations.⁴⁵

³⁹ Canadian Olympic Medal Count. (n.d.). 2018 PyeongChang. Olympic.ca. Retrieved October 26, 2023, from <https://olympic.ca/games/2018-pyeongchang/>

⁴⁰ Sciola, A. (2022, February 16). Nearly 50% of Canada's medalists this year are Quebec-born athletes. Daily Hive. <https://dailyhive.com/montreal/quebec-canada-medals-beijing-olympics>

⁴¹ Desbaillets, P. (2023, June). From past to present: The thriving soccer culture in Montreal. Cult MTL. Retrieved from <https://cultmtl.com/2023/06/from-past-to-present-the-thriving-soccer-culture-in-montreal/>

⁴² HGregoire. (n.d.). Humanité. Retrieved October 25, 2023, from <https://www.hgregoire.com/humanite>

⁴³ Groupe Park Avenue. (2021, August 26). A new partnership between the Montreal Alouettes and Groupe Park Avenue. Retrieved from <https://groupeparkavenue.com/en/news/new-partnership-between-montreal-alouettes-and-groupe-park-avenue>

⁴⁴ Ibid.

⁴⁵ Mobilis Foundation

In addition to the activities of the Foundation, Mobilis Corporation member dealers are very involved in their community and donate some \$1 million to charity every year.⁴⁶

4.7 New Brunswick Case Study

In New Brunswick, dealerships have taken a proactive role in shaping the future by supporting initiatives aimed at nurturing the younger generation. From fostering safe environments where children can grow and thrive to providing state-of-the-art tools for education, their contributions reflect a deep commitment to the development and empowerment of the next generations. The following examples illustrate this.

Rallye Motors' commitment to youth is exemplified through its 'Tee off For Kids Golf Tournament,' which has benefited the Boys and Girls Club of Moncton (BGC Moncton). Over a decade, the Rallye Group has raised over \$791,000, with \$90,000 coming from the 2023 event alone. The funds have been central to allowing BGC Moncton to provide an environment conducive to nurturing the potential of children and youth, offering them the space to grow in confidence and skill.⁴⁷

Downey Ford Saint John has also taken steps to foster the next generation of automotive experts. In partnership with Ford Canada, Downey Ford's donation of a Ford F-150 pickup truck to the New Brunswick Community College (NBCC)'s Automotive Department offers students a hands-on opportunity to advance their technical skills on the latest automotive technology, bridging the gap between theoretical knowledge and practical application.⁴⁸

The Lounsbury Group has demonstrated its commitment to higher education by donating \$50,000 to the University of Moncton's Evolution Fundraising Campaign in 2018.⁴⁹ This campaign focuses on two key areas: enriching the student experience and fostering excellence in research and innovation. The contribution by the Lounsbury Group thus supports a broader effort to equip the university with resources that benefit all aspects of academic life, from the quality of student programs to the scope of research projects.⁵⁰

Moreover, the NBADA has been a long-standing supporter of Special Olympics New Brunswick, illustrating a comprehensive approach to community support. The Special Olympics program aims to enrich the lives of Canadians with intellectual disabilities through sports, offering another platform for

⁴⁶ Ibid.

⁴⁷ Rallye Motors. (2023, Aug 1). Rallye motors tee off for kids. Rallye Motors. <https://www.rallyemotors-gm.ca/rallye-motors-tee-off-for-kids/>

⁴⁸ NBCC. (2021, July 16). This new Ford F-150 was recently donated and will be used in the Automotive Technician Program at our Saint John campus, giving students the opportunity to work on a state-of-the-art modern vehicle! Facebook. <https://www.facebook.com/myNBCC/photos/a.228198077206316/6510138115678916/>

⁴⁹ Lounsbury Group. (n.d.). In the community. Lounsbury Group. Retrieved from <http://www.lounsburys.com/evolution-fundraising-campaign/>

⁵⁰ Université de Moncton. (n.d.). Evolution fundraising campaign. Retrieved from <https://www.umoncton.ca/dons/en/evolution>

growth and learning. In 2022, dealer-led fundraising activities generated \$13,777.50 for the organization.⁵¹

The focused efforts of New Brunswick's auto dealerships have contributed to fostering the growth of young individuals in the region. Collectively, these contributions support young people in New Brunswick in accessing mentorship, education, and resources essential for their personal growth and development.

4.8 Nova Scotia Case Study

Nova Scotia's auto dealerships are pillars of the community, engaging in various charitable actions and community support initiatives. Examples of some of the social and community contributions made by a dealerships and dealer groups in the region are:

- In the early part of 2023, Steele Auto Group championed an initiative to support youth mental health. For every tire change they undertook, a subsequent donation was made to Kids Help Phone, a national organization renowned for providing essential online and telephone counseling, along with text-based support, catering to the Canadian youth's needs.⁵² In August of the same year, Porsche of Halifax, a member of group, donated \$179,500 to the Leukemia & Lymphoma Society of Canada, a charitable organization dedicated to funding research, providing education, and supporting patients affected by blood cancers, including leukemia and lymphoma. This philanthropic gesture was funded through the proceeds accumulated from the 2023 Porsche GT3 RS auction.⁵³
- Bruce Auto Group gifted Acadia University an All-Electric 2021 Kona EV. This gesture was more than just a donation; it signified a call to action, emphasizing the necessity of positive environmental impact and green mobility.⁵⁴ The Bruce Auto group has also shown consistent support for the IWK Foundation over multiple years, an organization that funds specialized care to women, children and youth from across the Maritime provinces. In 2023, the group donated over \$57,000 to the foundation.⁵⁵ In addition, leveraging its widespread retail presence, the

⁵¹ New Brunswick Automobile Dealers' Association. (n.d.). Retrieved from <http://www.nbada.org/>

⁵² Steele Auto Group [@steeleautogroup]. (2023, April 5). Help Us Create Positive Change for Mental Health! Instagram. <https://www.instagram.com/p/Cqp1qlxtnMr/>

⁵³ Steele Auto Group. (2023). Porsche of Halifax is committed to helping end blood cancers. Today they presented a cheque for \$179,500 to The Leukemia & Lymphoma Society of Canada. [LinkedIn post]. Retrieved from https://www.linkedin.com/posts/steele-auto-group_llscanada-lightthenight-porscheofhalifax-activity-7097998531348594688-6gsK/

⁵⁴ Bruce Auto Group. (n.d.). Starting 2022 off Green. Retrieved from <https://www.bruceautogroup.com/community-involvement-starting-2022-off-green/>

⁵⁵ Bruce Automotive Group. (2023). We did it! Thanks to your generous donations, we raised an incredible \$57,711 for the IWK Foundation. [LinkedIn post]. Retrieved from https://www.linkedin.com/posts/bruce-automotive-group_bruceautogroup-givingback-iwkfoundation-activity-7026903367121522689-0DFH/

group championed the IWK Telethon for Children, an annual fundraising event that broadcasts stories of life-changing care experiences, aiming to inspire community donations for the foundation's cause.⁵⁶

- In 2012 O'Regan's Automotive Group provided a \$1 million gift to the nascent Halifax Central Library, showcasing their commitment to learning.
- In 2018, O'Regan's Auto Group, in a collaboration with others pledged \$2 million to the Dartmouth General Hospital Above and Beyond Campaign, representing their support for healthcare and overall community welfare.⁵⁷

Beyond the financial aid, these examples demonstrate a genuine commitment to the community by dealerships, serving as a model for other businesses to follow.

4.9 Prince Edward Island Case Study

Businesses in PEI are fundamental to the community's development and support, serving a role far greater than commerce alone. Through various initiatives, new care dealerships in PEI are increasingly recognized for their roles in contributing to the well-being of the island's residents. The following examples demonstrate this support for their communities:

- In 2023, Centennial Auto Group sponsored "PURE IMAGINATION," a concert in collaboration with Prince St. Elementary and Montague Regional High, presented by the Charlottetown Legion choir. The event celebrated the joys of childhood through a series of choral performances. By funding this initiative, Centennial Auto Group was fostering a connection between the arts and the community, enriching local cultural offerings.⁵⁸
- Charlottetown Mitsubishi participated in the "12 Months of Caring" program, which provided free vehicle maintenance and repair services to selected "working poor" recipients every month. This assisted working parents in maintaining reliable transportation.⁵⁹ This support was crucial in enabling recipients to uphold their family and work commitments.
- Summerside Chrysler Dodge Jeep Ram donated a Jeep Wrangler Sport to the Grass Roots and Cowboy Boots event. This fundraiser, organized to support the Prince County Hospital (PCH)

⁵⁶ Bruce Automotive Group. (2021). Celebrate #GivingTuesday by giving a gift that gives back from the IWK Foundation IWK Care Catalogue. [LinkedIn post]. Retrieved from https://www.linkedin.com/posts/bruce-automotive-group_givingtuesday-activity-6871443963627216896-RiuW/

⁵⁷ O'Regan's Automotive Group. (n.d.). O'Regan's Community Involvement. Retrieved from <https://www.oregans.com/about-us/community>

⁵⁸ Centennial Auto Group. (2023). We're excited to announce our sponsorship with the Charlottetown Legion Choir to present "PURE IMAGINATION" in collaboration with Prince St. Elementary and Montague Regional High. Happening this weekend! [LinkedIn post]. Retrieved from https://www.linkedin.com/posts/centennial-auto-group_were-excited-to-announce-our-sponsorship-activity-7067471885667577856-XD7-/

⁵⁹ Charlottetown Mitsubishi. (n.d.). Our Events - "Stuff" we do. Retrieved from <https://www.charlottetownmitsubishi.ca/events/>

Foundation, assists in funding the purchase of medical equipment and the enhancement of patient care at PCH. With the participation of the dealership, the event successfully raised \$3.2 million for PCH Foundation.⁶⁰

These examples illustrate the various forms of philanthropy new car dealerships engage in and how their contributions extend well beyond their business operations.

4.10 Newfoundland and Labrador Case Study

New car dealerships in Newfoundland and Labrador actively support their communities. The generosity and community spirit of these businesses are evident in their contributions, ranging from educational support to transportation services for vulnerable groups. Examples of this support include:

- The Hickman Automotive directly contributes to the educational aspirations of local youth through its "Tuition for the Year" program. Recognizing the financial challenges faced by post-secondary students, this initiative provides an essential boost to one student each year, enabling them to pursue their educational goals with less financial burden.⁶¹ This scholarship is indicative of how dealerships in the province extend support to youth education, exemplifying a commitment to the next generation's academic and professional development.
- Capital Auto Group has demonstrated its community commitment by donating a Subaru Outback to Ronald McDonald House Newfoundland and Labrador (RMHNL). RMHNL provides a place for families to stay at little or no cost while their child receives treatment at nearby hospitals. The vehicle is a critical resource for the organization, facilitating transportation for families during their stay and enabling staff to conduct essential fundraising activities throughout Newfoundland and Labrador.⁶² This gift illustrates how dealerships offer mobility support to charitable organizations, aiding them in fulfilling their crucial missions.
- In 2017, the seniors' community in Labrador received substantial support from Labrador Motors Limited in Goose Bay, which, along with other community contributors, donated a 2018 GMC Acadia SLE to the Labrador Friendship Centre. This vehicle served as a seniors' van, enhancing the mobility and independence of the seniors by providing transportation for various needs, including medical appointments and social activities.⁶³

⁶⁰ PCH Foundation. (2023). Grass Roots and cowboy Boots Results 2023. Retrieved from <https://pchcare.com/grass-roots-and-cowboy-boots-results-2023/>

⁶¹ Hickman Automotive Group. (n.d.). Community. Retrieved from <https://www.hickmangroup.ca/community/>

⁶² Shaalan, A. (2022, May 20). 2022 Ronald McDonald House Outback Presentation. Capital Auto Group. <https://www.capitalautogroup.ca/en/news/view/2022-ronald-mcdonald-house-outback-presentation/100899>

⁶³ Labrador Motors Ltd. Goose Bay. (2017, November 27). Community Involvement. Retrieved from <https://www.labradormotorsgoosebay.com/en/news/view/community-involvement/66802>



These instances illustrate the role of car dealerships in supporting community welfare. Through educational aid, mobility support, and essential services, these dealerships are helping to build stronger communities across the province.

APPENDICES

APPENDIX A – ECONOMIC IMPACT METHODOLOGY

MNP's approach to economic impact modelling is based on published Statistics Canada multipliers and input-output modelling. Below is a step-by-step overview of our approach to estimating the economic impacts.

Step 1: Estimated the operating revenue of new car dealerships in Canada in 2022 and annual expenditures on construction and renovation.



Step 2: Applied Statistics Canada multipliers (by NAICS) to corresponding revenues/expenditures.



Step 3: Estimated federal, provincial and local government revenues.

Step 1: Estimate the operating revenue of new car dealerships in Canada in 2022 and annual expenditures on construction and renovation.

The first step in estimating the economic impacts of Canada's new car dealers was to estimate the operating revenue of the dealerships in Canada using the following sources from Statistics Canada:


- Retail trade sales (CANSIM 080-0020) for New Car Dealers (NAICS 44111).
- Annual retail trade survey financial estimates (CANSIM table 080-0030) for New Car Dealers (NAICS 44111).

Estimates of construction and renovation were developed using the following sources:

- Results from a survey of new car dealers conducted by CADA.
- Statistics Canada Table 34-10-0066-01 (Building permits, by type of structure and type of work).

Step 2: Applied Statistics Canada multipliers (by NAICS) to corresponding revenues/expenditures.

Statistics Canada's input-output multipliers were then used to estimate the economic impacts of Canada's new car dealers. To estimate the economic impacts generated by the construction and renovation activities, the multipliers were applied to the construction expenditures. Please note that the



direct output for retail operations is measured on margin basis. Therefore, to estimate the economic impacts of operations the multipliers were applied to gross operating margin i.e., revenue less cost of goods sold. Statistics Canada's input-output multipliers produced estimates of direct, indirect and induced output, GDP, and employment.

Step 3: Estimated Federal, Provincial and Local Government Revenues

Based on direct payments made to various levels of government, the estimated federal, provincial, and local government revenues include calculations of corporate income taxes, personal income taxes, taxes on products and taxes on production.

APPENDIX B – DETAILED ECONOMIC IMPACTS

The tables below provide a breakdown of economic impacts of operations and capital investments by province.

Economic Impacts of New Car Dealer Operations

Table 11: Estimated Economic Impacts of New Car Dealer Operations in BC

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$2,625	\$1,667	19,000	\$140	\$119	\$27
Indirect and Induced	\$3,048	\$1,782	14,360	\$196	\$231	\$62
Total	\$5,673	\$3,449	33,360	\$336	\$350	\$89

Table 12: Estimated Economic Impacts of New Car Dealers Operations in Alberta

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$3,242	\$2,172	25,190	\$173	\$111	\$33
Indirect and Induced	\$3,355	\$1,910	14,170	\$200	\$161	\$74
Total	\$6,597	\$4,082	39,360	\$373	\$272	\$107

Table 13: Estimated Economic Impacts of New Car Dealers Operations in Saskatchewan

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$810	\$564	5,380	\$50	\$44	\$4
Indirect and Induced	\$707	\$405	3,320	\$43	\$55	\$12
Total	\$1,517	\$969	8,700	\$93	\$99	\$16

Table 14: Estimated Economic Impacts of New Car Dealers Operations in Manitoba

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$769	\$507	6,010	\$49	\$45	\$14
Indirect and Induced	\$795	\$461	3,820	\$50	\$61	\$20
Total	\$1,564	\$968	9,830	\$99	\$106	\$34

Table 15: Estimated Economic Impacts of New Car Dealers Operations in Ontario

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$8,130	\$5,146	63,890	\$484	\$303	\$83
Indirect and Induced	\$9,138	\$5,179	42,130	\$577	\$628	\$293
Total	\$17,268	\$10,325	106,020	\$1,061	\$931	\$376

Table 16: Estimated Economic Impacts of New Car Dealers Operations in Quebec

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$5,570	\$3,732	37,000	\$234	\$377	\$79
Indirect and Induced	\$5,058	\$2,835	25,890	\$254	\$452	\$130
Total	\$10,628	\$6,567	62,890	\$488	\$829	\$209

Table 17: Estimated Economic Impacts of New Car Dealers Operations in New Brunswick

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$496	\$319	4,120	\$23	\$26	\$3
Indirect and Induced	\$490	\$277	2,520	\$30	\$43	\$10
Total	\$986	\$596	6,640	\$53	\$69	\$13

Table 18: Estimated Economic Impacts of New Car Dealers Operations in Nova Scotia

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$513	\$340	4,850	\$28	\$29	\$10
Indirect and Induced	\$569	\$323	2,770	\$36	\$46	\$17
Total	\$1,082	\$663	7,620	\$64	\$75	\$27

Table 19: Estimated Economic Impacts of New Car Dealers Operations in Prince Edward Island

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$65	41	430	\$3	\$4	\$0.3
Indirect and Induced	\$61	\$34	320	\$4	\$5	\$0.9
Total	\$126	\$75	750	\$7	\$9	\$1.2

Table 20: Estimated Economic Impacts of New Car Dealers Operations in Newfoundland and Labrador

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$298	\$195	1,690	\$15	\$15	\$2
Indirect and Induced	\$279	\$161	1,370	\$17	\$24	\$5
Total	\$577	\$356	3,060	\$32	\$39	\$7

Economic Impacts of New Car Dealer Investments in New and Existing Facilities

Table 21: Estimated Annual Economic Impacts of New Car Dealers' Investments in New and Existing Facilities in BC, 2018 to 2022

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$142	\$66	590	\$6	\$8	\$4
Indirect and Induced	\$151	\$83	670	\$8	\$9	\$2.6
Total	\$293	\$149	1,260	\$14	\$17	\$6.6

Table 22: Estimated Annual Economic Impacts of New Car Dealers' Investments in New and Existing Facilities in Alberta, 2018 to 2022

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$171.0	\$65.0	470	\$5	\$5	\$5
Indirect and Induced	\$199.0	\$107.0	820	\$11	\$8	\$2.9
Total	\$370.0	\$172.0	1,290	\$16	\$13	\$7.9

Table 23: Estimated Annual Economic Impacts of New Car Dealers' Investments in New and Existing Facilities in Saskatchewan, 2018 to 2022

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$37	\$17	160	\$1	\$2	\$0.9
Indirect and Induced	\$38	\$21	170	\$2	\$1.9	\$0.4
Total	\$75	\$38	330	\$3	\$3.9	\$1.3

Table 24: Estimated Annual Economic Impacts of New Car Dealers' Investments in New and Existing Facilities in Manitoba, 2018 to 2022

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$48	\$15	140	\$2	\$2	\$0.5
Indirect and Induced	\$56	\$31	260	\$3	\$3	\$1
Total	\$104	\$46	400	\$5	\$5	\$1.5

Table 25: Estimated Annual Economic Impacts of New Car Dealers Investments in New and Existing Facilities in Ontario, 2018 to 2022

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$305	\$164	1,290	\$13	\$11	\$14
Indirect and Induced	\$295	\$160	1,310	\$17	\$18	\$6.8
Total	\$600	\$324	2,600	\$30	\$29	\$20.8

Table 26: Estimated Annual Economic Impacts of New Car Dealers Investments in New and Existing Facilities in Quebec, 2018 to 2022

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$227	\$107	820	\$6	\$11	\$4
Indirect and Induced	\$250	\$130	1,210	\$11	\$18	\$5
Total	\$477	\$237	2,030	\$17	\$29	\$9

Table 27: Estimated Annual Economic Impacts of New Car Dealers Investments in New and Existing Facilities in New Brunswick, 2018 to 2022

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$29	\$11	140	\$1	\$0.9	\$0.1
Indirect and Induced	\$33	\$18	150	\$1.7	\$1.8	\$0.5
Total	\$62	\$29	290	\$2.7	\$2.7	\$0.6

Table 28: Estimated Annual Economic Impacts of New Car Dealers Investments in New and Existing Facilities in Nova Scotia, 2018 to 2022

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$20	\$7	70	\$0.5	\$0.5	\$0.04
Indirect and Induced	\$25	\$14	130	\$1.3	\$1.6	\$0.5
Total	\$45	\$21	200	\$1.8	\$2.1	\$0.54

Table 29: Estimated Annual Economic Impacts of New Car Dealers Investments in New and Existing Facilities in Prince Edward Island, 2018 to 2022

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$4	\$2	30	\$0.1	\$0.1	\$0.003
Indirect and Induced	\$4	\$2	20	\$0.2	\$0.3	\$0.04
Total	\$8	\$4	50	\$0.3	\$0.4	\$0.043

Table 30: Estimated Annual Economic Impacts of New Car Dealers Investments in New and Existing Facilities in Newfoundland and Labrador, 2018 to 2022

Category	Output (\$ millions)	GDP (\$ millions)	Employment (FTEs)	Federal Tax (\$ millions)	Provincial Tax (\$ millions)	Municipal Tax (\$ millions)
Direct	\$18	\$6	40	\$0.4	\$0.5	\$0.2
Indirect and Induced	\$21	\$12	100	\$1.2	\$1.4	\$0.3
Total	\$39	\$18	140	\$1.6	\$1.9	\$0.5

