

## HIGHLIGHTS OF MARKET RESEARCH CHATS FALLS PARK

In light of this market research, here are the key findings that can be issued:

### **The Park is enjoying an interesting socio- demographic context**

- The municipalities and MRCs surrounding the Park territory totaling more than 1.3 million people. It is forecasted that this surrounding population will reach nearly 1.8 million people within 20 years, an annual growth of 1.3%;
- The administrative Outaouais region has a more rapid economic growth than elsewhere in Quebec or in other similar regions and a higher personal income available in similar regions and slightly higher in Québec;
- The residents of outlying areas of large cities often practice outdoor activities during vacations (48%);
- It is among the "urbanites" we find the highest proportion of people practicing outdoor activities at more than 80 km from home (50%).

### **A park situated in important tourism regions**

- Outaouais Region : more than 1.4 million visits per year, with total expenditures of \$ 200 million;
- Region Ottawa -Gatineau National Capital : The area attracts about 7.5 million visitors for a total expenditure of 1.1 \$ G;

### **The Park is in an advantageous position in a competitive environment**

- An advantageous geographical location : near the Trans-Canada Highway and Highway 148 , accessible by Quyon Ferry;
- All types of activities together, the Gatineau Park is the competitor who offers the most similar activities identified Park after Calabogie Peaks Resort on the Ontario side;
- Competitors identified in a radius of 40 km offer on average 52 % (14 /27) of similar activities and services, while in a radius of 80 km, competitors offer an average of 44 % (12/27) activities and similar services;
- In a radius of 40 km, there is very little services related to the historical interpretation activities, self- interpretation, cycle paths, horseback riding, snowmobiling, mountain biking, and canoe-camping;
- 5% (1/19) of identified competitors offer all types of accommodation analyzed, such as Gatineau Park , located in a 40km radius;
- The canoe camping is the type of accommodation least offered : 11% (2 /19) of the competitors (13% (1/8) of the offer is available a radius of 40 km);
- 42% ( 8/19) competitors offer snowshoeing and cross-country skiing;
- 21% (4/19) of identified competitors offer cultural activities including archaeological and historical interpretation.

### **The Park product is part of an evolving and growing market**

- The theme parks and mass tourism respectively gives place to experiential travel and tourism activities;

- The local tourism and short stays are becoming popular;
- The majority of tourists would rather be looking for an overall tourist experience with several components. This trend is particularly relevant for soft adventure products, while the hard adventure enthusiasts would more likely be interested in "pure" product. A tourist may, for example, be interested in a trip in which there will be, in addition to the product of nature, an event component in urban areas and another in Aboriginal communities;
- The nature tourism is growing and now accounts for nearly a quarter of global tourism demand;
- For two decades, ecotourism and adventure tourism has been growing rapidly and their growth is expected to continue. A recent study from Adventure Ecotourism Quebec indicates that the area of adventure tourism and ecotourism represents 10% of all tourism spending in Quebec, in all markets;
- The World Tourism Organization has identified cultural tourism as a growing market segment of the tourism industry;
- The majority of Quebecers, as well as international tourists, incorporate cultural, educational and authenticity in their journeys in order to develop a more personal aspect to their experience;
- According to the Canadian Tourism Commission, the market for heritage enthusiasts is important and should continue to grow over the next few years.

### **A range of activities which meet current and projected trends**

- Luxury is now a key factor in selecting an activity. The customer wants to bring a high end quality kayak, be alone in his dogs sled, benefit from close supervision, live exotic experience or observe regions of Quebec's typical fauna. He also wants to stay in more luxurious shelters and lodges, without forgetting the Country hotels. Finally, he wants to taste the local cuisine also called «gourmet meals in the forest», because he looks mainly for regional and local flavors. This need for luxury becomes trendier in the province;
- The «ready to camp» lodging shows a growing popularity worldwide. In Quebec, this trend is no exception and we see more and more alternative forms of camping (yurts , Huttopia tents, tree perched cabins, etc.);
- According to the *Fédération québécoise de camping et caravaning*, there is no doubt that new types of accommodation such as yurts and Huttopia tents are increasingly required;
- The snowshoeing activity (6%) is gaining in popularity for some time. In fact, the majority of snowshoers were hooked by this activity in the past five years;
- The country skiing is gaining much popularity since one out of every five Quebecers (21%) practice this activity;
- The popularity of cycling in Quebec is indisputable. Impressive . Envable . Better yet, it continues to climb;
- Walking remains the most popular summer activity among Quebecers with a prevalence rate 45%;
- Amidst other activities growing or emerging, there is camping, hiking in nature and canoe / kayak;
- 68 % of Quebecers practice outdoor activities while on vacation (27 % occasionally, 41% often).

### **A Park with a product reaching several types of customer**

- The Historian: back in time. The trip is a course on data and historical sites;

- Seeker of attractions: always ready to stop and admire the sights, scenery, attractions, etc.;
- The nature lover: being outside is what matters;
- The family type: it is not the destination that matters. It is to be with family or friends;
- The hiker: if it is outside, he is there. Hiking, walking, visiting parks, forests, mountains, bird watching, etc;
- The escapee: he is looking for a destination to relax in peace.

### **Prospects for significant attendance**

- The Park is positioned in two main segments, namely: the family outdoors and the call of nature;
- These two segments represent 39% (respectively 21% and 18%) tourists from the Outaouais region;
- A projected attendance of 179,891 visitors expected.

### **Major economic impact forecast**

- Average of \$ 732,000 the first year and revenues of \$ 3.9 million in 2024
- In total, the added value of the project at the end of the 10 year period would be \$ 3.3 million;
- The direct, indirect and induced wages paid will reach \$ 2.2 million and a total of 34 jobs will be generated;
- The different levels of government (federal, provincial and municipal) will take approximately \$ 1M in taxes and direct taxes;
- In addition of the estimated 34 jobs created by infrastructure investment with the model of economic benefits, jobs can be added in a sustainable way by the activities of the park in the long term. Thus, ultimately, the Park could hire between 13 and 100 people, with an average of 54 people.