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Study on vacationers in the Gatineau Valley RCM

Final report

Presented to:

SADC
Société d'aide au développement des collectivités
VALLÉE-DE-LA-GATINEAU

By:

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MARKETING ■ DÉVELOPPEMENT ■ INNOVATION

TABLE OF CONTENTS

1. Introduction

Zins Beauchesne and Associates prepared this report for the **Gatineau Valley SADC,** which constitutes the preliminary version of the final report of a study on vacationers in the Gatineau Valley RCM. The purpose of this study is to update the study **Zins Beauchesne and Associates** did in 2005-2006.

For more than 30 years, the **Gatineau Valley SADC** has helped encourage the community to take charge of its future by partaking in activities that support cooperation and local partnership from a sustainable development perspective.

The study done for the **Gatineau Valley SADC** dovetails with its mission, since the information in this report will enable the organization to propose interventions on the territory which will enhance the well-being and contribute to the growth of Gatineau Valley communities. The study will also yield a better understanding of the behaviours and needs of vacationers who come to the Gatineau Valley RCM and those who have chosen to settle there permanently.

This report by **Zins Beauchesne and Associates** will include:

- a reminder of the context and the objectives of the study;
- a presentation on the profiles of pre-retirees and retirees from the Ottawa-Gatineau CMA;
- an analysis of the sources of vacationer clientele;
- an analysis of the findings of the vacationer survey;
- recommendations.

The study methodology and a copy of the questionnaire used to survey vacationers appear in the index.

The detailed findings of the vacationer survey are in a separate appendix in this report.

2. Reminder of the context and objectives

2.1 Background

In 2005-2006, **Zins Beauchesne and Associates** performed for the **Gatineau Valley SADC** a study to qualify the "retirees-vacationers" phenomenon and their impact on commercial supply and demand in the Gatineau Valley RCM and to make feasible recommendations to draw more of this clientele, enable business persons to adjust to this new demand and get as many spinoff benefits as possible.

Gatineau Valley SADC went this route to test the hypothesis to the effect that "retirees-vacationers" account for a substantial and ever-increasing clientele in the region, whose effect is rather substantial, and to measure this particular phenomenon (the study showed that vacationers spend slightly more than $28 million within the Gatineau Valley RCM in 2005-2006.

Moreover, the study revealed that the vast majority (90%) of vacationers on Gatineau Valley territory came from the Ottawa-Gatineau CMA and that this territory included a heavy concentration of persons 45 and over, that the residents' income exceeded the average in both Quebec and Ontario and that they were more highly educated than the average Quebecker and Ontarian.

The aim here is to update the information produced by the research back in 2005-2006 and depict the current situation of vacationers in the Gatineau Valley RCM.

2.2 Study objectives

The main objective of the study was to update the information in the 2005-2006 study with more recent information on the retiree-vacationer phenomenon. In more specific terms, this meant:

- developing a profile of pre-retirees and retirees likely to come to and vacation in the Gatineau Valley RCM.
- conducting a consumption survey of vacationers in the Gatineau Valley RCM to evaluate the goods and services purchased locally by that clientele, purchases made outside the RCM (commercial outflow) and a description of needs that are going unmet at this time, their use of the Internet, their assessment of cell phone network coverage and satisfaction with municipal services.

3. Profile of retirees and pre-retirees from the Ottawa-Gatineau CMA

Data provided by the Gatineau Valley SADC show that the vast majority of vacationers in the region come from the Ottawa-Gatineau CMA.[1] The major characteristics of the people in this CMA appear in this chapter. Note that special attention was paid to the 45-and-over segment, since they are more likely to vacation in the Gatineau Valley region.

3.1 Sociodemographic and socioeconomic profile of the Ottawa-Gatineau CMA

Population distribution by age group

For starters, Ontario accounts for 74.9% of the total population of the Ottawa-Gatineau CMA. Ottawa and the City of Gatineau account for 71.8% and 21.1% of the population of the CMA respectively.

Based on the study done in 2005, the population in the Ottawa-Gatineau CMA is aging at a slower rate than the Quebec average. While the proportion of the 45 and over segment was higher in the Ottawa-Gatineau CMA in comparison with Quebec overall in 2005, the situation has reversed itself in 2013 with 41.4% in this region in the 45 and over group (45.7% for all of Quebec).

This situation is largely explained by the fact that the 45 and over segment is systematically higher in municipalities on the Quebec side of the Ottawa-Gatineau CMA, as compared with the Ontario side of the CMA.

The table on the following page provides a population breakdown by age group in the Ottawa-Gatineau CMA all over Quebec and for each of the municipalities that make up the CMA.

[1] *The findings that bear out this claim appear in the following chapter.*

Population breakdown by age (2013) – Ottawa-Gatineau CMA

	0-24 yrs	25-44 yrs	45-64 yrs	65-84 yrs	85 yrs and over	Total	% 45 yrs and over
Major territories							
Ottawa-Gatineau CMA	384 092	381 958	367 165	151 596	23 537	1 308 348	41.4%
Quebec overall	2 259 871	2 156 032	2 368 440	1 170 403	172 710	8 127 456	45.7%
Ottawa-Gatineau CMA (Quebec side)							
Gatineau	83 226	78 642	78 515	31 225	3 896	275 504	41.2%
Val-des-Monts	3 275	3 156	3 697	966	59	11 153	42.3%
Cantley	3 869	3 346	3 127	722	27	11 091	34.9%
La Pêche	2 019	1 865	2 831	1 078	146	7 939	51.1%
Chelsea	2 370	1 512	2 697	711	42	7 332	47.1%
Pontiac	1 743	1 533	1 960	768	60	6 064	46%
L'Ange-Gardien	1 719	1 417	1 827	521	44	5 528	43.3%
Val-des-Bois	116	133	405	302	13	969	74.3%
Notre-Dame-de-la-Salette	183	165	312	112	4	776	55.2%
Bowman	115	116	278	170	5	684	66.2%
Mayo	121	138	242	74	9	584	55.7%
Denholm	136	107	238	97	3	581	58.2%
Ottawa-Gatineau CMA (Ontario side)							
Ottawa	272 172	278 967	258 523	110 491	18 759	938 912	41.3%
Clarence-Rockland	7 594	6 595	7 553	2 880	308	24 930	43.1%
Russell	5 434	4 266	4 960	1 479	162	16 301	40.5%

Source: Pitney Bowes 2013 to 2023 Estimates and Projections – Canada FSA.

Processed by PCensus 2013 software.

Population distribution based on median household income

In 2013, the median household income (before income tax) of residents in the Ottawa-Gatineau CMA was $73,271, which far exceeded the corresponding figure of all of Quebec - $55,230.

A more detailed analysis also revealed that the median income of households in the Ottawa-Gatineau CMA ($75,667) outpaces that of Quebec residents in the same CMA ($68,038). Nonetheless, households in both parts of the CMA are better off than those in Quebec on average.

When the median income (before income tax) of households in municipalities in the Ottawa-Gatineau CMA is broken down further, it is noted that the median income in the following municipalities exceeds the CMA median of $73,271.

- Chelsea (QC) - $99,449
- Russell (ON) - $91,146
- Cantley (QC) - $88,408
- L'Ange-Gardien (QC) - $78,799
- Clarence-Rockland (ON) - $76,342
- Ottawa (ON) - $75,387
- Mayo (QC) -$ 73,571.

The median household income in all of Quebec, the Ottawa-Gatineau CMA and the municipalities that it includes appears in the following table:

Median household income (2013) – Ottawa-Gatineau CMA sub-regions*

	Median income
Major territories	
Ottawa-Gatineau CMA	$ 73 271
Ottawa-Gatineau CMA (Quebec part)	$ 68 038
Ottawa-Gatineau CMA (Ontario part)	$ 75 667
All of Québec	$ 55 230
Ottawa-Gatineau CMA (Quebec part)	
Gatineau	$ 67 020
Val-des-Monts	$ 70 863
Cantley	$ 88 408
La Pêche	$ 64 108
Chelsea	$ 99 449
Pontiac	$ 64 766
L'Ange-Gardien	$ 78 799
Val-des-Bois	$ 43 651
Notre-Dame-de-la-Salette	$ 52 358
Bowman	$ 42 273
Mayo	$ 73 571
Denholm	$ 30 899
Ottawa-Gatineau CMA (Ontario part)	
Ottawa	$ 75 387
Clarence-Rockland	$ 76 342
Russell	$ 91 146

**Note: Employment income is computed only for people 15 and over*

Source: Pitney Bowes 2013 to 2023 Estimates and Projections – Canada FSA.

Processing by PCensus 2013 software.

Personal income according to age

The National Household Survey of 2011 indicated that people 15 and over have a higher personal average income in Ontario ($29,642) than in Quebec ($24,910). This figure for this particular segment is higher in the Ottawa-Gatineau CMA ($35,689) than the average in both Quebec and Ontario..

The population residing in the Ontario part of the CMA has a higher average personal income ($37,088) than the population on the Quebec side ($31,947). However, the population 15 and over in both parts of the CMA has a higher personal income than Quebec and Ontario on average.

In terms of the various age groups, those in the 45-64 age group have the highest average personal incomes, regardless of the region surveyed. Once again, the 45-64 segment in both parts of the Ottawa-Gatineau CMA earn more than the average Quebecker and Ontarian. Those between 45-64 in the Ontario part of the CMA have higher personal incomes ($45,204) than on the Quebec side of the CMA ($38,287)

Population distribution based on age and median personal income (2011)

	15-24 yrs	25-44 yrs	45-64 yrs	65 yrs and over	Total (15 yrs and over)
All of Québec	$14 128	$31 604	$30 073	$20 702	$24 910
All of Ontario	$11 658	$36 680	$34 398	$27 353	$29 642
Ottawa-Gatineau CMA	$13 580	$42 467	$42 863	$33 865	$35 689
Ottawa-Gatineau CMA (Quebec part)	$17 023	$39 484	$38 287	$22 396	$31 947
Ottawa-Gatineau CMA (Ontario part)	$13 028	$43 484	$45 204	$38 446	$ 37 088

Source: Statistics Canada, National Household Survey of 2011, product number 99-014-X2011039 in the Statistics Canada catalogue.

Education levels of the surveyed population

The National Household Survey of 2011 indicated that residents of the City of Gatineau have more education (21.1% of those 15 and over have not completed high school) than Quebeckers on average (22.2% of the 15 and over group did not complete high school). However, City of Ottawa residents (12.9% of the local population 15 and over have not completed their high school) have more schooling than do Gatineau residents.

The proportion of those 15 and over with university education is higher in Ottawa (35.4%) than in Gatineau, but both figures outpace the Quebec average of 18.6%.

It was also noted that people in the 45-64 segment with a university education is higher in Ottawa (37.4%) than in Gatineau (23.3%).

In both Gatineau and Ottawa, the proportion of those between 25 and 44 with a university education is higher than their counterparts in the 45-64 group. Moreover, the proportion of residents between 25 and 44 who have not completed high school is lower than the 45-64 group. One can thus conclude that the next generation of vacationers will be better educated than those currently in the 45-64 segment.

Population distribution based on age and education (2013)

	15-24 yrs		25-44 yrs		45-64 yrs		65 yrs and over		Total (15 yrs and over)	
	No.	%	No.	%	No.	%	No.	%	No.	%
Gatineau										
No certificate, degree or diploma	13 455	37.1%	7 845	10.5%	12 405	16.2%	11 720	41.2%	45 425	21.1%
High school diploma or the equivalent	11 150	30.7%	12 060	16.2%	18 340	24%	5 820	20.5%	47 370	22%
Apprentice or trade school certificate or diploma	2 425	6.7%	9 960	13.4%	10 925	14.3%	3 175	11.2%	26 485	12.3%
Certificate or diploma from a college, CEGEP or other non-university educational institution	6 255	17.2%	15 680	21%	12 765	16.7%	2 920	10.3%	37 620	17.4%
University certificate or diploma less than a bachelor's degree	655	1.8%	3 120	4.2%	4 255	5.6%	1 460	5.1%	9 490	4.4%
University	2 335	6.4%	25 825	34.7%	17 795	23.3%	3 335	11.7%	49 290	22.9%

	15-24 yrs		25-44 yrs		45-64 yrs		65 yrs and over		Total (15 yrs and over)	
	no	%	no	%	no	%	no	%	no	%
Ottawa										
No certificate, degree or diploma	38 520	31.2%	11 975	4.9%	20 580	8.3%	21 850	20.7%	92 925	12.9%
High school diploma or the equivalent	50 770	41.2%	38 470	15.9%	53 400	21.6%	25 750	24.4%	168 390	23.4%
Apprentice or trade school certificate or diploma	2 545	2.1%	10 935	4.5%	15 790	6.4%	8 015	7.6%	37 285	5.2%
Certificate or diploma from a college, CEGEP or other non-university educational institution.	12 450	10.1%	54 945	22.7%	53 910	21.8%	15 540	14.7%	136 845	19.0%
Certificate or diploma that is less than a bachelor's degree	2 990	2.4%	9 145	3.8%	11 240	4.5%	5 565	5.3%	28 940	4.0%
University	16 055	13.0%	116 840	48.2%	92 695	37.4%	28 990	27.4%	254 580	35.4%
All of Quebec										
No certificate, degree or diploma	327 480	33.6%	221 025	10.9%	424 690	18.1%	462 835	41.0%	1 436 030	22.2%
High school diploma or the equivalent	301 895	31.0%	304 775	15.0%	548 395	23.4%	249 685	22.1%	1 404 750	21.7%
Apprentice or trade school certificate or diploma	92 250	9.5%	393 240	19.4%	432 425	18.5%	131 560	11.6%	1 049 475	16.2%
Certificate or diploma from a college, CEGEP or other non-university educational institution	176 145	18.1%	417525	20.6%	384 385	16.4%	97 800	8.7%	1 075 855	16.6%
Certificate or diploma that is less than a bachelor's degree	19 365	2.0%	98 560	4.9%	126 400	5.4%	61 010	5.4%	305 335	4.7%
University	57 965	5.9%	594 420	29.3%	424 290	18.1%	126 470	11.2%	1 203 145	18.6%

	15-24 yrs		25-44 yrs		45-64 yrs		65 yrs and over		Total (15 ans et plus)	
	no	%	no	%	no	%	no	%	no	%
Ontario										
No certificate, diploma or degree	587 900	34.5%	265 480	7.9%	504 090	13.8%	597 050	34.1%	1 954 520	18.7%
High school diploma or equivalent	689 945	40.5%	733 370	21.8%	968 785	26.5%	409 700	23.4%	2 801 800	26.8%
Apprentice or trade school certificate or diploma	40 470	2.4%	212 880	6.3%	333 685	9.1%	184 100	10.5%	771 135	7.4%
Certificate or diploma from a college, CEGEP or other non-university learning institution	175 540	10.3%	834 165	24.8%	820 235	22.4%	240 935	13.7%	2 070 875	19.8%
University certificate or diploma less than a bachelor's degree	39 950	2.3%	154 365	4.6%	163 765	4.5%	69 070	3.9%	427 150	4.1%
University	168 540	9.9%	1 157 625	34.5%	870 430	23.8%	251 580	14.4%	2 448 175	23.4%

Source: Statistics Canada, National Household Survey of 2011, product no. 99-012-X2011047 in the Statistics Canada catalogue.

Housing prices

The average housing price in the Ottawa-Gatineau CMA was $301,049 in 2011, which far exceeds the average for all of Quebec. It was noted that the price is higher in the Ontario part of the CMA ($348,737) than the Quebec part ($224,461). Nonetheless, the average housing price in the Quebec part of the CMA is higher than the average price for all of Quebec.

It was noted that close to 84% of the housing in the Ontario part of the Ottawa-Gatineau CMA was worth $250,000 and over, which far outpaces the other areas in the survey. The proportion of housing in the $250,000 and over bracket in the Quebec part of the CMA (41.9) is virtually the same as the average for all of Quebec (41.6%)

Distribution of housing units based on value (2011)

	$150 000 and over	$200 000 and over	$250 000 and over	Average housing price
All of Quebec	79.3%	60.6%	41.6%	$214 537
Ottawa-Gatineau CMA	95.1%	86.1%	72.7%	$301 049
Ottawa-Gatineau CMA (Quebec part)	87.9%	66.2%	41.9%	$224 461
Ottawa-Gatineau CMA (Ontario part)	97.7%	93.3%	83.8%	$348 737

Source: Statistics Canada, National Household Survey, product number 99-014-X2011030 in the Statistics Canada catalogue.

3.2 Growth of the 45-and-over population

The following section deals with growth projections of the pre-retired and retired segment of the urban portion of the Ottawa-Gatineau CMA, i.e., the demographic projections of Ottawa and Gatineau populations that account for more than 90% of the total population of the CMA. The projections focus on the probable evolution of the demographic make-up of both cities by 2023.

The data also includes information on the projections for the Les-Collines-de-l'Outaouais RCM, as the territory of the RCM covers the Quebec part of the Ottawa-Gatineau CMA that is not covered by the City of Gatineau. The amalgamations of the past few years in Ottawa mean that the City now represents 96% of the population of the Ontario part of the CMA, which is significant enough to generalize the information regarding the Ontario part of the Ottawa-Gatineau CMA.

The following observations can be made from the table on the following page:

- the proportion of the 45-and-over population will rise more in Gatineau (15.3%) than in Ottawa (13.7%) by 2023;
- In Ottawa and in Gatineau, the 70-74 group will be the fastest growing segment (growth of 36.5% and 44.1%) respectively, while the 75 and over group will the Les-Collines-de-l'Outaouais RCM will rank number one with a forecasted growth rate of 80.2%):
  - this significant growth is largely explained by the influx of people in this age group from outside the RCM, not by the aging population in the RCM. For example, retirees 75 and over could decide to leave Gatineau and settle permanently in the RCM.

The information also shows that the potential number of vacationers could grow at a slower pace in the medium to long term, as the number of people in the 45-54 segment will decrease by 2023 in all three of the sectors studied.

Population growth forecasts (2013-2023)

	Population in 2013	Population in 2023	Variation (%)
Ottawa			
45 to 49 yrs	72 561	71 400	-1.6%
50 to 54 yrs	72 451	68 900	-5.2%
55 to 59 yrs	62 297	73 500	15.2%
60 to 64 yrs	51 214	66 700	23.2%
65 to 69 yrs	42 857	55 300	22.5%
70 to 74 yrs	29 132	45 900	36.5%
75 yrs and over	57 261	67 800	15.5%
Total 45 yrs and over	**387 773**	**449 500**	**13.7%**
Gatineau			
45 to 49 yrs	22 209	19 850	-11.9%
50 to 54 yrs	21 302	18 340	-16.2%
55 to 59 yrs	18 596	19 195	3.1%
60 to 64 yrs	16 408	20 565	20.2%

	Population in 2013	Population in 2023	Variation (%)
65 to 69 yrs	12 712	18 020	29.5%
70 to 74 yrs	8 119	14 515	44.1%
75 yrs and over	14 290	23 610	39.5%
Total 45 yrs and over	**113 636**	**134 095**	**15.3%**
Les-Collines-de-l'Outaouais RCM			
45 to 49 yrs	3 940	3 790	-4%
50 to 54 yrs	4 165	3 840	-8.5%
55 to 59 yrs	4 475	3 965	-12.9%
60 à 64 yrs	4 095	4 135	1%
65 à 69 yrs	3 175	3 450	8%
70 à 74 yrs	2 215	2 420	8.5%
75 yrs and over	745	3 145	80.2%
Total 45 yrs and over	**23 810**	**24 745**	**3.8%**

Sources: Pitney Bowes 2013 to 2023 Estimates and Projections – Canada FSA, ISQ (2021-Québec), City of Ottawa (projections in 2023 only).

3.3 Vacationers retired from the Public Service

It is an acknowledged fact that the aging population also affects employers that must deal with an aging workforce. In Gatineau, 9 of the 15 largest employers are in the public or parapublic sectors, where in Ottawa, the corresponding figure is 7 in 15[2]. In Gatineau alone, there were 35,881 jobs in the public and parapublic sectors among the 22 largest employers. In Ottawa, the largest 22 employers employed 98,885 people in these sectors.

In total. there were at least 134,766 jobs in the public and parapublic sectors in the Ottawa-Gatineau CMA, which means that these sectors represent a significant pool of potential vacationers.

[2] *http://collections.banq.qc.ca/ark:/52327/bs59340*

According to the Clerk of the Privy Council of Canada[3], forecasts for the coming years call for a levelling off of the rate of retirements at around 3.5%, which means that, each year, more than 4700 workers in the public and parapublic sectors will retire in the Ottawa-Gatineau CMA alone. The tables appearing on the following pages show the number of persons employed by the 22 largest employers in Gatineau and in Ottawa.

Major employers in Gatineau (2010)*

	Number of employees	% of total
Government of Canada	**21 175**	**52.3%**
Centre hospitalier des Vallées-de-l'Outaouais	**3 240**	**8.0%**
City of Gatineau	**2 220**	**5.5%**
Government of Québec	**1 966**	**4.9%**
Commission scolaire des Draveurs	**1 790**	**4.4%**
Leamy Lake Casino	**1 600**	**4.0%**
Commission scolaire des Portages-de-l'Outaouais	**1500**	**3.7%**
Bell Canada	**769**	**1.9%**
Collège de l'Outaouais	650	1.6%
Bowater	602	1.5%
Hydro-Québec	**600**	**1.5%**
HP	500	1.2%
Scott papers	475	1.2%
Domtar	450	1.1%
Hilton Lac-Leamy	450	1.1%
Bellai & Frères	450	1.1%
Société de transport de l'Outaouais	**420**	**1.0%**
Canadian Museum of Civilization	**400**	**1.0%**
Université du Québec en Outaouais	**320**	**0.8%**
Papier Masson	310	0.8%
Wal-Mart Canada	300	0.7%
Château Cartier	280	0.7%
Total	**40 467**	**100.0%**

**Note: Employers in the public or parapublic sectors in bold*
Sources: Bibliothèque et Archives nationales du Québec (BAnQ): http://collections.banq.qc.ca/ark:/52327/bs5934 (access restricted to subscribers).
Conseil du Trésor: http://www.tresor.gouv.qc.ca/fileadmin/PDF/effectif_fonction_publique/effectif10_11.pdf

[3] *http://www.clerk.gc.ca/fra/feature.asp?featureId=19&pageId=234#1.4*

Major employers in Ottawa (2012)*

	Number of employees	% of total
Government du Canada	**83 875**	**66.0%**
Nortel Networks	11 000	8.7%
Canada Post Corporation	**5 500**	**4.3%**
University of Ottawa	**2 850**	**2.2%**
Bell Canada	2 826	2.2%
Newbridge Networks Corporation	2 600	2.0%
Compaq Canada	2 400	1.9%
OC Transpo	**2 200**	**1.7%**
Carleton University	**1 733**	**1.4%**
Mitel Corporation	1 500	1.2%
Clarica Life Assurance (was Metropolitan)	1 115	0.9%
Algonquin College	**1 022**	**0.8%**
National Capital Commission	**1 005**	**0.8%**
Bank of Nova Scotia	1 000	0.8%
Royal Bank of Canada	1 000	0.8%
Corel Corporation	950	0.7%
Minto Developments Inc.	850	0.7%
Simware Inc.	850	0.7%
Loeb Inc.	770	0.6%
JDS Uniphase	700	0.6%
Cognos Inc.	650	0.5%
Computing Devices Canada	650	0.5%
Total	**127 046**	**100.0%**

**Note: Employers in the public or parapublic sectors in bold*

Sources: FoundLocally Media Inc.: http://ottawa.foundlocally.com/HR/Jobs-Employers.htm

Open data Canada: http://data.gc.ca/data/en/dataset/899375b4-0402-4afa-9b8b-64602911d7d8

3.4 Profile of cottages in the Gatineau Valley RCM

3.4.1 More cottages in the Gatineau Valley RCM

Between 2005 and 2014, 364 new residences were built on the territory of the Gatineau Valley RCM, which represents growth of 6%. The highest growth rate (in both numbers and percentage (18.5%)) was posted by the municipality of Lac-Sainte-Marie, where 117 new secondary residences were built during this time.

Increase in the number of cottages on the Gatineau Valley RCM

	2005	2014	Variation
Denholm	360	368	2.2%
Low	457	480	5.0%
Kazabazua	449	474	5.6%
Lac-Sainte-Marie	633	750	18.5%
Gracefield	1 014	1 045	3.1%
Cayamant	629	672	6.8%
Blue Sea	557	604	8.4%
Bouchette	381	386	1.3%
Sainte-Thérèse-de-la-Gatineau	381	412	8.1%
Messines	463	480	3.7%
Maniwaki	No cottages in this municipality.		
Déléage	159	145	-8.8%
Egan-Sud	5	5	0.0%
Bois-Franc	20	23	15.0%
Montcerf-Lytton	113	124	9.7%
Aumond	263	271	3.0%
Grand-Remous	179	188	5.0%
Total	**6 063**	**6 427**	**6.0%**

Source: Gatineau Valley RCM

3.4.2 Higher property assessments for cottages in the Gatineau Valley RCM

In recent years, secondary residences such as cottages have seen their property assessments rise in the Gatineau Valley RCM, driving up the market value of the properties. The main factors behind the higher assessments are a stronger demand, renovations of existing units and the conversion of some secondary residences into main residences. The property assessments of cottages in the Gatineau Valley rose 107.5% between 2005 and 2014.

Rise in the average property values of cottages in the Gatineau Valley RCM

Denholm	$78 430	163 866	108.9%
Low	76 146	150 503	97.7%
Kazabazua	64 889	143 340	120.9%
Lac-Sainte-Marie	93 196	205 871	120.9%
Gracefield	89 042	211 758	137.8%
Cayamant	57 432	117 645	104.8%
Blue Sea	69 840	156 815	124.5%
Bouchette	105 390	174 543	65.6%
Sainte-Thérèse-de-la-Gatineau	74 570	122 033	63.6%
Messines	84 449	147 249	74.4%
Maniwaki	No cottages in this municipality		
Déléage	41 161	85 776	108.4%
Egan-Sud	54 860	66 626	21.4%
Bois-Franc	51 150	56 905	11.3%
Montcerf-Lytton	59 983	124 347	107.3%
Aumond	50 072	81 966	63.7%
Grand-Remous	52 538	131 191	149.7%
Average property value	**$76 090**	**$157 874**	**107.5%**

Source: Gatineau Valley RCM. Calculations by Zins Beauchesne and Associates.

4. Analysis of the sources of vacationer clientele

This chapter contains a geodemographic analysis of the main sources of vacationer clientele to the Gatineau Valley RCM. The Gatineau Valley RCM provided this information consisting of the postal codes associated with the principal place of residence of vacationers who come to the region and have a secondary residence in the RCM.

4.1 Source of Gatineau Valley RCM vacationers

Overview

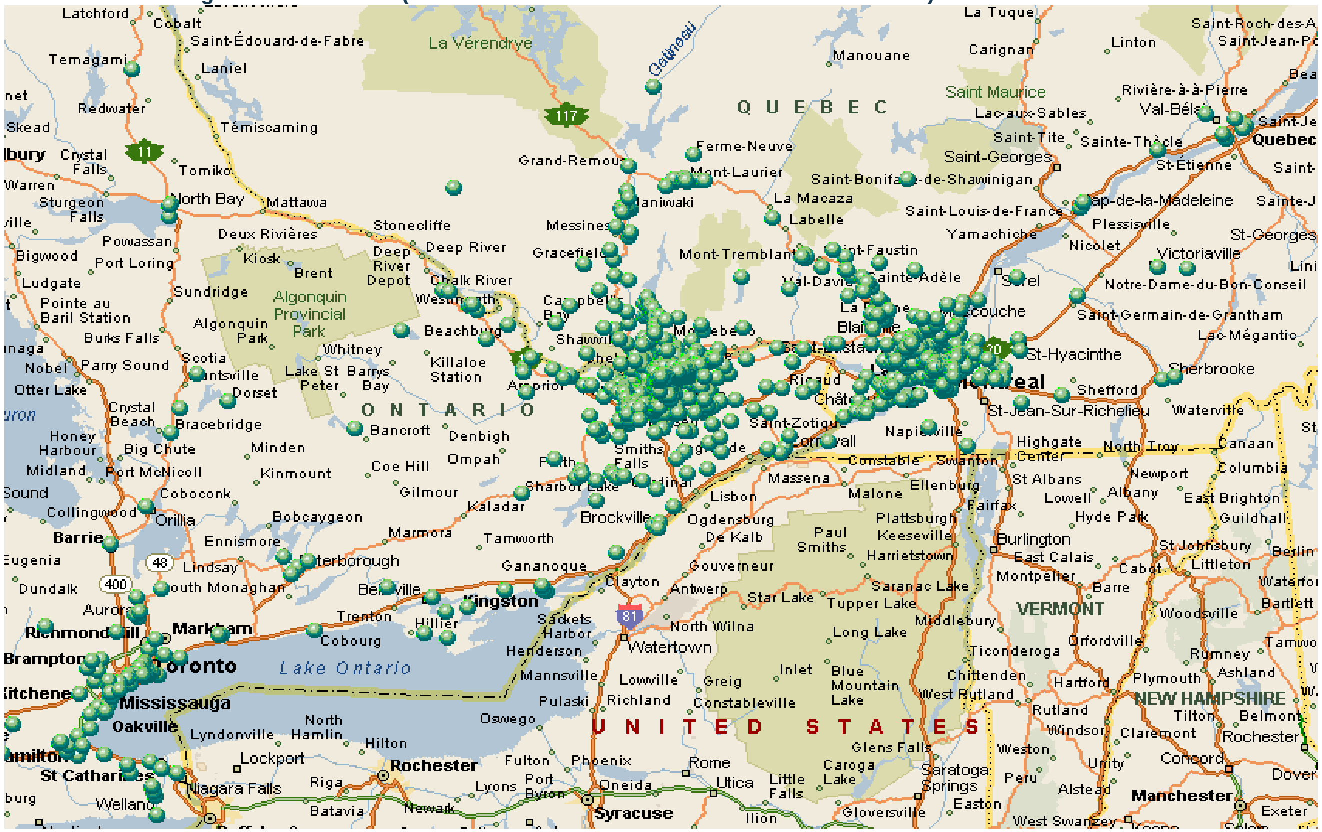
The origin of vacationers in the Gatineau Valley RCM appears in the following map. The green dots show the postal codes of their principal places of residence. There is a strong concentration of vacationers who come from the following regions:

- Ottawa-Gatineau CMA;
- the Montreal CMA
- the Toronto CMA
- Southern Ontario;
- the Victoria-Vancouver region.

Origin of vacationers (overview)

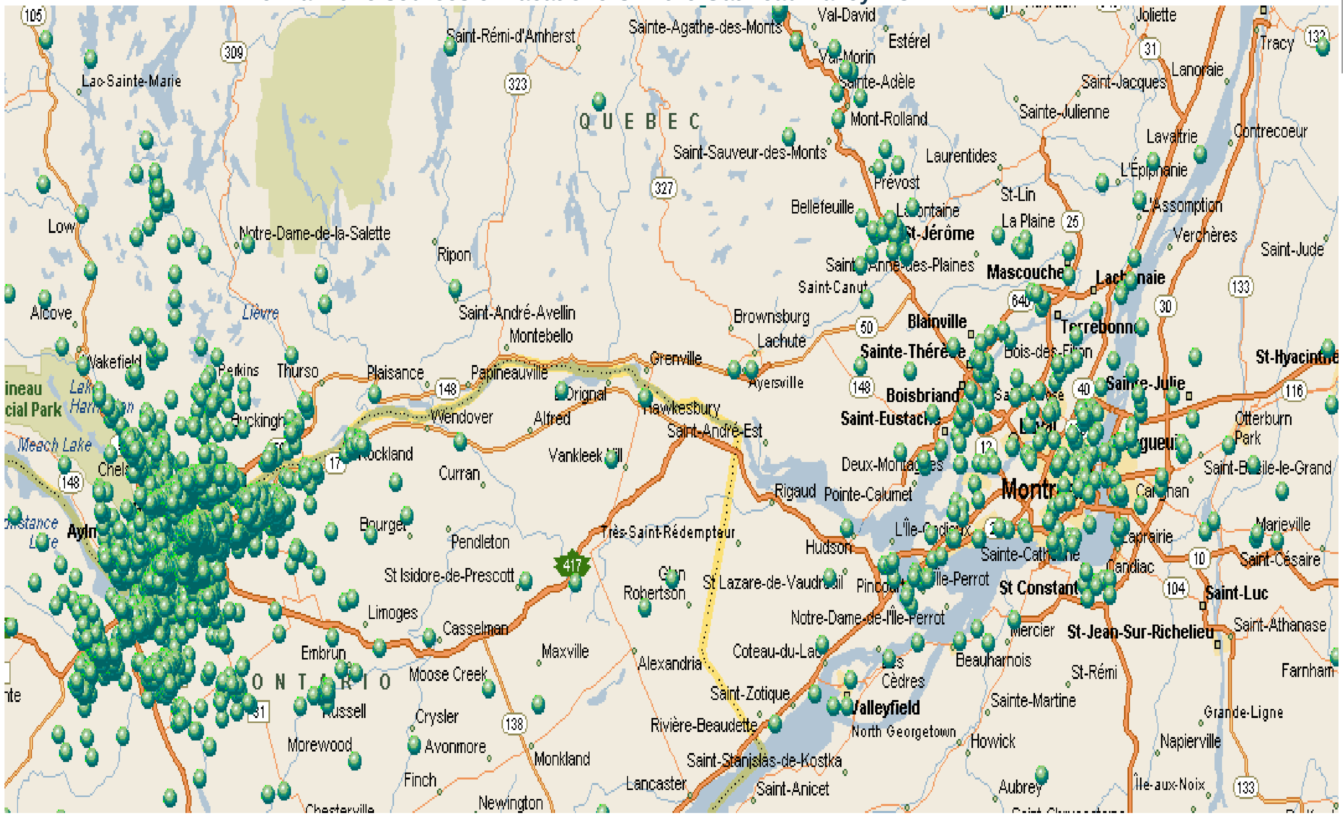
A closer look reveals that the Ottawa-Gatineau CMA, the Montreal CMA and the Southern Ontario are the three main sources of vacationers to the Gatineau Valley CMA.

Origin of vacationers (a closer look of the main sources of vacationers)



The following map, however, shows that more vacationers in the Gatineau Valley RCM come from the Ottawa-Gatineau CMA than the Montreal CMA.

The main two sources of vacationers in the Gatineau Valley RCM.



Origin of vacationers in the Gatineau Valley RCM based on the postal code of their principal residence.

We noted a high concentration (80%) of vacationers in the Gatineau Valley RCM come from the Ottawa-Gatineau Valley where they have their principal residence. A review of the postal codes of the vacationers' principal residence shows that slightly more than half (51%) reside in Ontario.

A total of 6427 secondary residences are located on the Gatineau Valley RCM, of which 6,259 (97.4%) are owned by Canadian residents and 168 by non-Canadians (mainly Americans). The study by Zins Beauchesne and Associates only concerns Canadian vacationers for whom we have data from Statistics Canada.

Origin of Canadian vacationers based on region

	Number of units	% housing units
Ottawa-Gatineau CMA	**5 071**	**81.0%**
Ottawa-Gatineau CMA (Quebec part)	2 318	37.0%
Ottawa-Gatineau CMA (Ontario part)	2 753	44.0%
Elsewhere in Québec	**679**	**10.8%**
Montréal-Laval	121	1.9%
Québec outside CMA	558	8.9%
Elsewhere in Ontario	**439**	**7.0%**
Toronto	32	0.5%
Ontario outside CMA	407	6.5%
Elsewhere in Canada	**70**	**1.1%**
Alberta	25	0.4%
British Columbia	29	0.5%
Other Canadian provinces	16	0.3%
Grand total	**6 259**	**100.0%**

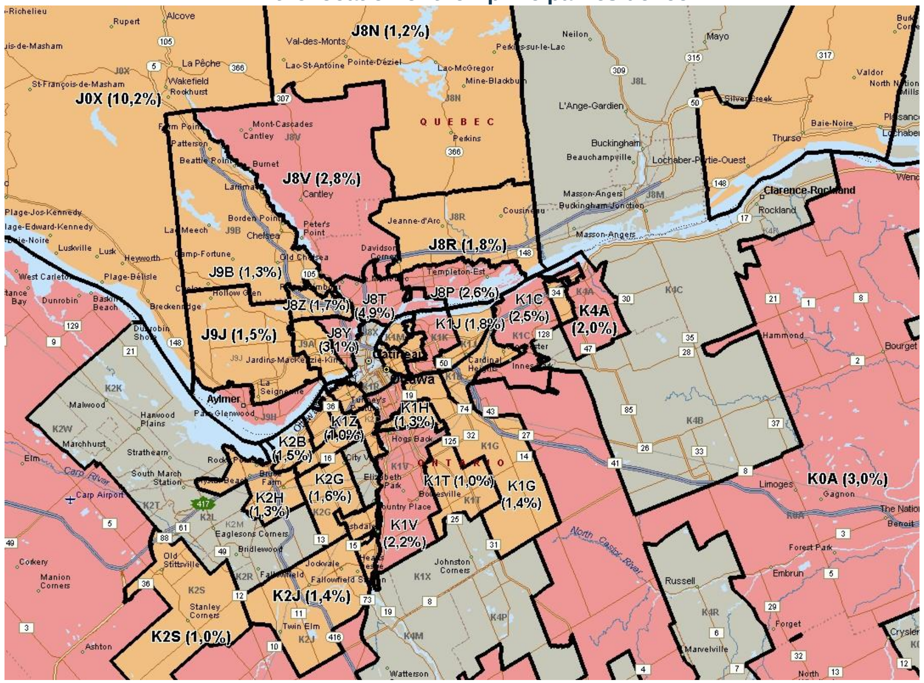
Source: Gatineau Valley SADC.

Calculations by Zins Beauchesne and Associates.

To shed more light on the main sources of vacationers, **Zins Beauchesne and Associates** developed a map to identify the place of principal residence using the first three characters of the postal code.

The following map illustrates the zones in the Ottawa-Gatineau CMA where there is a significant concentration of vacationers. The zones in pink and orange have concentrations of 2% and between 1% and 1.9% respectively.

Origin of vacationers based on the postal code of the location of their principal residence



The following table sets out in detail the postal codes where the largest concentrations of vacationers frequenting the Gatineau Valley RCM. There are four categories of concentration:

- sectors representing at least 2% of vacationers;
- sectors representing entre 1% and 1.9% of vacationers;
- sectors representing entre 0.5 and 0.9% of vacationers;
- sectors representing less than 0.5% of vacationers.

Note that, with the exception of the postal codes of Maniwaki (J9E), Val-d'Or (J0W) and Val-des-Monts (J8N), all sectors representing at least 0.5% of vacationers to the region are located in Gatineau or in Ottawa.

Origin of vacationers based on the postal code of their principal place of residence

Postal code	Number of housing units	% of housing units
J0X (Gatineau)	638	10.2%
J8T(Gatineau)	308	4.9%
K1S (Ottawa)	205	3.3%
J8Y (Gatineau)	194	3.1%
J9E (Maniwaki)	189	3.0%
K0A (Ottawa)	188	3.0%
J8V (Gatineau)	178	2.8%
J9H (Gatineau)	173	2.8%
J8P (Gatineau)	165	2.6%
K1C (Orléans/Ottawa)	157	2.5%
K1K (Ottawa)	137	2.2%
K1V (Ottawa)	136	2.2%
K4A (Orléans/Ottawa)	126	2.0%
K1J (Gloucester/Ottawa)	114	1.8%
K2A (Ottawa)	113	1.8%
J8R (Gatineau)	111	1.8%
J8Z (Gatineau)	109	1.7%
K1L (Vanier/Ottawa)	108	1.7%
K1Y (Ottawa)	101	1.6%
K2G (Nepean/Ottawa)	98	1.6%

Postal code	Number of housing units	% of housing units
J9J (Gatineau)	96	1.5%
K2B (Ottawa)	96	1.5%
J0W (Val d'or)	94	1.5%
K1N (Ottawa)	93	1.5%
J9A (Gatineau)	87	1.4%
K1G (Ottawa)	87	1.4%
K2J (Nepean/Ottawa)	85	1.4%
J9B (Chelsea)	84	1.3%
K2H (Nepean/Ottawa)	81	1.3%
K1H (Ottawa)	80	1.3%
K2C (Ottawa)	78	1.2%
K1B (Ottawa)	75	1.2%
J8N (Val-des-Monts)	73	1.2%
K1E (Orléans/Ottawa)	69	1.1%
K1M (Ottawa)	68	1.1%
K2S (Stittsville/Ottawa)	65	1.0%
K1T (Ottawa)	63	1.0%
K1Z (Ottawa)	63	1.0%
J8X (Gatineau)	54	0.9%
K2E (Nepean/Ottawa)	47	0.8%
K1R (Ottawa)	46	0.7%
K2K (Kanata/Ottawa)	44	0.7%
K2L (Kanata/Ottawa)	42	0.7%
K2M (Kanata/Ottawa)	42	0.7%
K2P (Ottawa)	42	0.7%
J8M (Gatineau)	32	0.5%
Postal codes with less than 0.5% of the housing units	925	14.8%
Total	**6 259**	**100.0%**

Source: Gatineau Valley SADC

4.2 Profile of the major sources of vacationers

The following section contains a sociodemographic analysis of the sectors (the first three characters of the postal codes) of the Ottawa-Gatineau CMA, since they are regions with the most pre-retirees and retirees where there are strong concentrations of vacationers who come to the Gatineau Valley CMA.

Note that this section focuses on an analysis of postal codes representing at least 1% of vacationers who come to the Gatineau Valley and who are located on the Ottawa-Gatineau CMA. The first part of the analysis looks at sectors in Quebec and the second part deals with Ontario postal codes.

4.2.1 Picture of Gatineau

Population based on age group

In the Quebec part of the Ottawa-Gatineau CMA, the most populous sectors are J0X (45 638 residents), J8T (41 239), J8P (33 826) and J9H (30 138). In absolute numbers, these territories have the largest numbers of persons 45 and over (more than 72,000).

The J0X and J8T sectors, where 15% of vacationers who come to the Gatineau Valley RCM live, have the most persons 45 and over (24,964 and 21,033 respectively).

Population distribution of the main sources of Quebec vacationers in the Ottawa-Gatineau CMA (2013)

	25-34 yrs	35-44 yrs	45 yrs and over	Total population	% 45 and over
J0X Gatineau	4 702	4 610	24 964	45 638	54.7%
J8P Gatineau	4 859	4 169	15 026	33 826	44.4%
J8R Gatineau	3 978	4 925	10 212	29 577	34.5%
J8T Gatineau	4 685	4 729	21 033	41 239	51.0%
J8V Gatineau	3 496	4 471	10 838	28 107	38.6%
J8Y Gatineau	3 826	3 165	12 580	25 517	49.3%
J8Z Gatineau	2 152	1 999	6 324	15 317	41.3%
J9A Gatineau	3 364	3 410	7 197	20 379	35.3%
J9B Chelsea	459	1 053	3 450	7 332	47.1%
J9H Gatineau	3 921	4 538	12 266	30 138	40.7%
J9J Gatineau	4 868	4 759	7 828	26 938	29.1%
Total	**40 310**	**41 828**	**131 718**	**304 008**	**-**

When the characteristics of the residents of the main sources of vacationers are analyzed (i.e., their mode of ownership, median household income and the most frequent education completed), it is noted that residents in the J8V postal code stand out on all three criteria.

Residents in this sector account for 2.8% of the total number of vacationers, which represents a 1 percentage point increase since the 2005 study. These findings certainly point to possible growth among households in this sector, as in the J8R and J9J sectors (Chelsea was excluded due to the fact it can be considered a vacationer area on its own).

Surprisingly enough, residents in the J0X are the main source of vacationers and are the second largest in terms of home ownership, even though their median income is not as high. As a result, it is very difficult to come up with a profile of vacationers who come to the Gatineau Valley RCM.

Characteristics of the main sources of Quebec vacationers of the Ottawa-Gatineau CMA (2013)

	% vacationers	% owners	Media household income	Most frequent completed education
J0X Gatineau	**10.2%**	**92.0%**	65 701	No degree
J8P Gatineau	2.6%	62.0%	73 593	No degree
J8R Gatineau	1.8%	**85.0%**	**101 595**	University
J8T Gatineau	**4.9%**	55.0%	73 895	No degree
J8V Gatineau	**2.8%**	**80.0%**	**106 844**	University
J8Y Gatineau	**3.1%**	35.0%	59 571	University
J8Z Gatineau	1.7%	37.0%	82 051	University
J9A Gatineau	1.4%	50.0%	**103 174**	University
J9B Chelsea	1.3%	**96.0%**	**137 114**	University
J9H Gatineau	**2.8%**	75.0%	90 929	University
J9J Gatineau	1.5%	**86.0%**	**125 384**	University

Household expenses

The following table sets out the average household expenses (annually) for the main postal codes that can be considered as a source of vacationers based on the main expense categories. It was noted that the three sectors with the highest household expenses are J9B ($32,462), J9J ($29,346) and J8V ($26,629).

It is also important to note that households in the J0X and J8Y sector (13.3% of vacationers) spend the least. Conversely, the potential growth in the J8V sector is confirmed further, as it is among the three sectors where households spend the most.

Expenses in households in the main sources of Quebec vacationers in the Ottawa-Gatineau CMA (2013)

	Food	Furnishings	Clothing	Personal care	Leisure	Reading	Tobacco and alcoholic beverages	Total
J0X Gatineau	8 160	1 893	2 443	1 128	3 694	229	1 588	19 135
J8P Gatineau	8 831	1 991	2 960	1 341	3 945	274	1 666	21 008
J8R Gatineau	9 840	2 696	3 576	1 558	5 277	311	1 668	24 926
J8T Gatineau	8 488	1 960	3 095	1 330	4 000	277	1 635	20 785
J8V Gatineau	**11 014**	**2 545**	**3 942**	**1 726**	**5 075**	**327**	**2 000**	**26 629**
J8Y Gatineau	7 731	1 592	2 530	1 163	3 186	262	1 567	18 031
J8Z Gatineau	9 080	2 208	3 330	1 402	4 206	316	1 859	22 401
J9A Gatineau	10 311	2 674	3 804	1 647	4 971	341	1 970	25 718
J9B Chelsea	**12 589**	**3 175**	**5 222**	**2 068**	**6 645**	**396**	**2 367**	**32 462**
J9H Gatineau	9 390	2 429	3 547	1 518	5 073	319	1 907	24 183
J9J Gatineau	**11 587**	**3 054**	**4 436**	**1 854**	**5 913**	**363**	**2 139**	**29 346**

4.2.2 Picture of Ottawa

Population based on age group

In the Ontario part of the Ottawa-Gatineau CMA, the K0A sector is by far the largest with 97,430 residents, followed by K2J (58,549), K1V (57,607), K2G (53,119) and K4A (50,879). In absolute numbers, these sectors collectively account for the largest number of persons 45 and over – approximately 122,000.

Population distribution of the main sources of Ontario vacationers in the Ottawa-Gatineau CMA (2013)

	25-34 yrs	35-44 yrs	45 yrs and over	Total population	% 45 yrs and over
K0A Ottawa	11 659	13 544	43 200	97 430	44.3%
K1B Ottawa	2 784	2 291	7 905	18 278	43.2%
K1C Orléans	4 796	4 735	18 883	39 885	47.3%
K1E Orléans	1 891	1 804	7 540	15 540	48.5%
K1G Ottawa	6 229	4 615	16 034	37 752	42.5%
K1H Ottawa	2 024	2 051	8 627	17 187	50.2%
K1J Gloucester	4 081	3 497	13 260	28 371	46.7%
K1K Ottawa	4 648	4 247	14 927	32 216	46.3%
K1L Vanier	3 565	2 321	8 346	17 837	46.8%
K1M Ottawa	935	852	3 814	7 198	53.0%
K1N Ottawa	6 295	3 125	9 513	25 900	36.7%
K1S Ottawa	5 695	4 095	11 937	29 929	39.9%
K1T Ottawa	5 108	4 967	11 313	32 440	34.9%
K1V Ottawa	9 960	8 358	21 089	57 607	36.6%
K1Y Ottawa	4 007	3 300	9 095	21 106	43.1%
K1Z Ottawa	3 752	2 961	8 461	20 509	41.3%
K2A Ottawa	1 968	2 174	8 511	16 838	50.5%
K2B Ottawa	5 877	4 378	15 639	35 260	44.4%
K2C Ottawa	5 641	3 855	12 560	30 704	40.9%
K2G Nepean	7 404	8 120	20 841	53 119	39.2%
K2H Nepean	3 409	3 361	13 773	27 559	50.0%
K2J Nepean	9 227	10 144	19 635	58 549	33.5%
K2S Stittsville	3 174	4 728	11 257	28 862	39.0%
K4A Orléans	8 102	8 277	17 226	50 879	33.9%
Total	122 231	111 800	333 386	800 955	-

An analysis of the characteristics of residents in the main areas that produce vacationers (i.e., based on their method of ownership, median household income and the most frequent level of education completed) shows that no sector stands out in terms of the criteria studied.

Surprisingly enough, residents in K0A, which is the main source of vacationers, rank second in home ownership but their median income is closer to the average than to the highest income levels. It is therefore difficult to develop a typical profile of vacationers who come to the Gatineau-Valley RCM.

A comparison of K0A and K1S, which are virtually identical, reveals that K0A has significant growth potential. Although K0A has the same proportion of vacationers as K1S (3.3%), K0A could generate an additional 2,920 vacationers.

The main sources of vacationers were compared with similar sectors (with respect to median income) that do not produce as many vacationers, and significant growth opportunities were discovered in:

- K1E (when compared with K1C);
- K4A (when compared with K1C);
- K1T (when compared with K1V).

Characteristics of the main sources of Ontario vacationers in the Ottawa-Gatineau CMA (2013)

	% vacationers	% home owners	Median household income	Most frequent level of educ. completed
K0A Ottawa	**3.0%**	**95.0%**	$81 637	High school completed
K1B Ottawa	1.2%	80.0%	74 863	University
K1C Orleans	**2.5%**	89.0%	**94 594**	University
K1E Orleans	1.1%	**94.0%**	**93 934**	University
K1G Ottawa	1.4%	57.0%	62 631	University
K1H Ottawa	1.3%	64.0%	76 487	University
K1J Gloucester	1.8%	72.0%	74 457	University
K1K Ottawa	**2.2%**	50.0%	57 652	University
K1L Vanier	1.7%	22.0%	49 544	University
K1M Ottawa	1.1%	58.0%	**95 670**	University
K1N Ottawa	1.5%	19.0%	48 594	University
K1S Ottawa	**3.3%**	51.0%	84 308	University
K1T Ottawa	1.0%	85.0%	75 151	University
K1V Ottawa	**2.2%**	73.0%	69 482	University
K1Y Ottawa	1.6%	47.0%	66 223	University
K1Z Ottawa	1.0%	44.0%	52 571	University
K2A Ottawa	1.8%	61.0%	76 323	University
K2B Ottawa	1.5%	36.0%	47 412	University
K2C Ottawa	1.2%	63.0%	58 127	University
K2G Nepean	1.6%	91.0%	83 970	University
K2H Nepean	1.3%	89.0%	75 850	University
K2J Nepean	1.4%	**97.0%**	91 376	University
K2S Stittsville	1.0%	**97.0%**	**104 361**	University
K4A Orleans	2.0%	**95.0%**	**98 496**	University

Household expenses

The following table provides a breakdown of average monthly expenditures (on an annual basis) of the main areas identified by postal codes, which are considered sources of vacationers based on the major categories of expenditures. It was noted that households in K1M ($34,167), K2S ($30,555) and K1C ($28,821) spend the most. Only K1C ($28,821) rank among those that account for 2% or more of Gatineau-Valley RCM vacationers

Household expenditures for the main sources of Ontario vacationers who come to the Ottawa-Gatineau CMA (2013)

	Food	Furnishings	Clothes	Personal care	Leisure	Reading	Tobacco and alcoholic beverages	Total
K0A Ottawa	8 943	2 751	3 594	1 471	5 349	331	1 966	24 405
K1B Ottawa	8 578	2 409	3 698	1 489	4 915	321	1 721	23 131
K1C Orléans	**10 779**	**2 931**	**5 114**	**1 814**	**6 089**	**356**	**1 738**	**28 821**
K1E Orléans	9 875	2 822	4 604	1 716	5 844	365	1 749	26 975
K1G Ottawa	8 323	2 430	3 399	1 403	4 835	307	1 635	22 332
K1H Ottawa	9 969	2 767	4 103	1 775	6 192	429	1 938	27 173
K1J Gloucester	9 269	2 682	4 001	1 593	5 663	376	1 951	25 535
K1K Ottawa	8 418	2 094	3 353	1 374	4 206	302	1 849	21 596
K1L Vanier	7 861	1 791	2 994	1 247	3 521	316	1 773	19 503
K1M Ottawa	**11 613**	**3 514**	**6 356**	**2 131**	**7 304**	**582**	**2 667**	**34 167**
K1N Ottawa	7 994	1 694	3 501	1 247	3 783	328	2 113	20 660
K1S Ottawa	9 961	2 469	5 194	1 786	5 586	498	2 442	27 936
K1T Ottawa	8 710	2 609	3 683	1 444	4 925	300	1 654	23 325
K1V Ottawa	8 168	2 411	3 501	1 397	4 853	306	1 535	22 171
K1Y Ottawa	8 964	2 311	4 206	1 538	4 889	415	2 206	24 529
K1Z Ottawa	7 851	1 928	3 458	1 314	4 198	298	1 810	20 857
K2A Ottawa	8 964	2 489	4 128	1 646	5 358	399	1 848	24 832
K2B Ottawa	7 318	1 731	2 869	1 210	3 615	285	1 576	18 604
K2C Ottawa	7 672	2 104	3 065	1 264	4 242	288	1 604	20 239
K2G Nepean	9 342	2 777	3 921	1 548	5 543	348	1 740	25 219
K2H Nepean	9 152	2 578	3 897	1 584	5 507	374	1 850	24 942
K2J Nepean	9 437	3 163	4 260	1 612	6 208	349	1 514	26 543
K2S Stittsville	**11 018**	**3 243**	**5 340**	**1 897**	**6 824**	**424**	**1 809**	**30 555**
K4A Orléans	9 752	3 456	4 237	1 607	6 292	323	1 482	27 149

5. Findings of the vacationer survey

Between March 6 and 23, 2014, 300 cottage owners in the Gatineau Valley were invited to take part in a survey to evaluate their consumption habits relating to their secondary residence. Respondents were randomly selected from a list of cottage owners provided by the Gatineau Valley RCM, which excluded those who owned a principal residence in the Gatineau Valley RCM and the Antoine Labelle RCM. The questionnaires were administered in French (56.6%%) and in English (44%) to the persons responsible for household purchases.

5.1 Respondents' profile

All of the respondents surveyed owned a cottage in one of the municipalities in the Gatineau Valley RCM. The breakdown is as follows:

Municipality of the secondary residence (n=300)

Municipality	% of respondents
Gracefield	17.3%
Lac-Sainte-Marie	12.0%
Cayamant	12.0%
Blue Sea	9.7%
Low	7.3%
Kazabazua	7.3%
Messines	6.7%
Denholm	6.3%
Bouchette	6.3%
Sainte-Thérèse-de-la-Gatineau	5.7%
Aumond	3.3%
Grand-Remous	2.3%
Déléage	2.0%
Montcerf-Lytton	1.3%
Bois-Franc	0.3%

The sociodemographic characteristics of the vacationers who own their own cottage and participated in the survey appear in the following table.

Sociodemographic profile of vacationers (n=300)

	% of respondents
Level of education completed	
Primary	3.0%
Secondary (D.E.S., D.E.P.,...)	20.0%
Cégep and technical	22.3%
University degree	53.3%
Don't know/did not answer	1.3%
Age	
25 to 34 yrs	1.0%
35 to 44 yrs	6.0%
45 to 54 yrs	26.0%
55 to 64 yrs	36.3%
65 to 74 yrs	22.7%
75 yrs and over	6.3%
Did not answer	1.7%
Answer	**59.3 yrs**
Persons 18 yrs and over living at the residence	
1 person	14.7%
2 persons	56.3%
More than 2 persons	28.3%
Don`t know/didn`t answer	0.7%
Persons under 18 living at the residence	
None	80.7%
1 person	10.3%
2 or more persons	9.0%

	% of respondents
Sex of respondent	
Man	48.7%
Woman	51.3%
Occupation	
Professional	23.3%
Semi-professional and technician	5.0%
Management, administration and commerce	11.0%
White collar	8.7%
Specialized tradesperson	2.7%
Unspecialized worker or journeyman	1.3%
Farming, forestry or fishing worker	0.0%
Full-time student	0.3%
Retiree	39.3%
At home	2.0%
Benefit recipient	0.0%
Unemployed	1.7%
Employed (unspecified)	2.7%
Did not answer	2.0%
Total annual household income	
Less than $ 30 000	3.3%
30 000 - 39 999	5.0%
40 000 - 49 999	5.3%
50 000 - 59 999	8.3%
60 000 - 69 999	4.7%
70 000 - 79 999	4.3%
80 000 - 89 999	5.0%
90 000 - 99 999	3.0%
$100 000 and over	37.0%
Did not answer	24.0%

	% of respondents
Language most often spoken at home	
French	49.7%
English	48.0%
Other	2.0%
Don't know/didn't answer	0.3%

5.2 Length of current and future stays at secondary residences

5.2.1 Length of current stays

In the past year, vacationers, on average, stayed at their secondary residence for more than **24 hours on 22.4 occasions**. The stays averaged out to **13.7 nights**, or 75.9 nights spent at the cottage in the last years. On average, **3.2 persons were at** the cottage during each of the stays.

In comparison with 2005, the number of stays and the number of persons at the cottage did not change, but **the length of stays has almost doubled since 2005.**

Description of an average stay (n=300)

	Number
Number of stays (Q3)	**22.4**
Less than 10 stays	30.3%
10 or more stays	69.7%
Average length of stay (Q4)	**13.7 nights**
Less than 5 nights	75.0%
Between 5 and 7 nights	5.0%
Between 8 and 30 nights	7.7%
31 nights and over	9.7%
Don't know/Didn't answer	2.7%

	Number
Total length of stays in the past year	**75.9 nights**
1 to 15 nights	10.3%
16 to 30 nights	15.7%
31 to 45 nights	9.3%
46 to 60 nights	21.3%
61 nights and over	40.7%
Don't know/didn't answer	2.7%
Number of persons in the secondary residence during an average stay (Q5)	**3.2 persons**
1 person	5.7%
2 persons	42.7%
3 persons	14.7%
4 to 20 persons	36.0%
Don't know/Didn't answer	1%

In comparison with the average, vacationers **who do not live with children under 18** stayed more at their secondary residence in the last year (23.8 stays).

The average length of stays for those with **less than 10 stays** at their secondary residence is higher (38.5%), whereas those who had **10 or more stays** spent, on average, 3 nights at their secondary residence.

Vacationers with the following characteristics generally occupied their secondary residence with more persons than the average[4]:

- those with a university education (3.5 persons);
- those living with a child younger than 18 (4 persons).

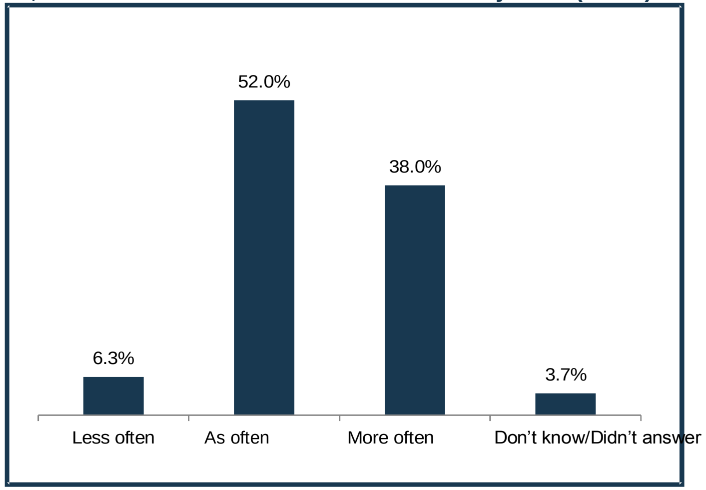
[4] *Cross-compared findings according to some sociodemographic characteristics of respondents appear in a separate appendix herein.*

5.2.2 Future stays

About **one half of vacationers (52%) will be going to their cottage** in the next three years as they are now. However, 38% intend to come to the RCM more frequently, while 6.3% anticipate they will be coming less often.

In comparison with 2005, more respondents would like to go to their cottages more often (33.3% in 2005).

Q6. In your opinion, will the frequency of your visits to your cottage decrease, remain stable or increase in the next three years? (n=300)

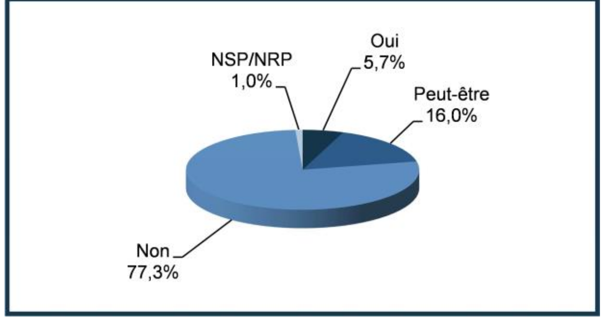


Respondents with the following characteristics are more inclined to want to go to their cottages more often:

- those with **the highest incomes** (45.9%);
- those who **are employed** (47.0%).

In the next 5 years, 77.3% of vacationers surveyed do not intend to permanently settle in the Gatineau Valley RCM. However, **16% may do so and 5.7% will**.

Q7. In the next 5 years, do you intend to live permanently in the Gatineau Valley RCM? (n=300)



NSP/NRP – Don't know/didn't answer Yes, No, Maybe

Those who speak **French** (10.1%) are more inclined to settle permanently in the RCM.

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5.3 Consumption habits by expense category

5.3.1 Distribution of expenses by cottage owners

The following table shows the percentages of households that incurred these types of expenses for their secondary residence or during a stay at their secondary residence, the average estimated expense per stay during the last year, the average estimated expense per household during a stay at the secondary residence, the proportion of these expenses that were paid for in Gatineau Valley RCM businesses and outside the RCM, and the total expenses in and outside the RCM by all cottage owners (generalization of expenses per household of the sample applied to the 6259 households surveyed, i.e., Canadian cottage owners in the RCM).

Distribution of vacationer expenses per expense category inside and outside the Gatineau Valley RCM

Type of expense	% of households that incur this expense per stay at the secondary residence or for the secondary residence	Average household expense per year*	Average household expense per stay*	% of expenses incurred in the RCM	% of expenses incurred outside the RCM	Total expenses of the population in the survey within the RCM (6259 households)	Total expenses of the population in the survey outside RCM (6259 households)
Food excluding restaurant expenses	87.0%	*$2 703.20*	$343.13	67.2%	32.8%	$11 369 788.95	$5 549 539.85
Gas and fuel	79%	*$2 586.94*	$155.14	49.1%	50.9%	$7 950 103.81	$8 241 553.65
Alcohol, wine and spirits, excluding alcohol purchases at the restaurant	76.3%	*$1 144.04*	$59.15	71.0%	29.0%	$5 083 987.92	$2 076 558.44
Restaurants	73%	*$350.46*	*$65.10*	65.9%	34.1%	$1 445 535.70	$747 993.44
Hardware, construction materials	76.7%	$2 995.00	*$457.15*	84.1%	15.9%	$15 765 137.91	$2 980 567.10
Horticultural products, flowers and plants	38.7%	$94.15	*$37.56*	72.9%	27.1%	$429 588.66	$159 696.19
Sports articles (accessoiries, clothes, etc.)	24.3%	$125.30	*$12.69*	65.1%	34.9%	$510 548.51	$273 704.19

Type of expense	% of households That incur this type of expense at the secondary residence or for the secondary residence	Average household expenses per year*	Average household expenses per year*	% of expenses incurred in the RCM	% of expenses incurred outside RCM	Total expenses of the population of the study in the RCM (6259 households)	Total expenses of population of the study outside the RCM (6259 households)
Beauty and health products including drugs	30%	*$228.25*	$27.33	49.1%	50.9%	$701 450.82	$727 165.93
Leisure equipment and accessories such as computer equipment, books and games	19%	*$191.20*	$41.07	47.1%	52.9%	$563 655.50	$633 065.30
Residence maintenance services (grass cutting, security, snow removal, etc.	39.3%	$262.41	*$99.38*	89.5%	10.5%	$1 469 969.65	$172 454.54
Clothing, footwear and accessories including jewelry	17.7%	$57.65	*$17.00*	71.1%	28.9%	$256 551.09	$104 280.26
Furniture, household appliances and decoration accessories	25%	346.35 $	*$72.80*	50%	50%	$1 083 902.33	$1 083 902.33
Purchase and repairs to motorized vehicles (cars, motorcycles, four wheelers, boats, etc.)	26.7%	$1 051.09	*$377.01*	78%	22.0%	$5 131 442.40	$1 447 329.91
Parts, tires and accessories for vehicles and cars	7.7%	$44.85	*$21.64*	71.7%	28.3%	$201 273.48	$79 442.67
Total				**66.6% (average)**	**33.4% (average)**	**$51 962 936.72**	**24 277 253.79**

In italics: the estimate (expenses per stay x number of stays or expenses per year/number of stays)

**Average calculated including the respondents who do not spend anything on that particular type of expense ($0)*

Overall, owners of secondary residences spend more than **$51.9M in the Gatineau Valley RCM and $24.3M outside the RCM** for goods and services associated with the secondary residence. In 2005, expenses in both categories were **$22.8M** and **$13.7M** respectively. A portion of this increase is attributable, on the one hand, to the increase in the number of vacationers in the RCM, and to the increase in the cost of living between 2005 and 2014, particularly in the major categories such as food, gas and fuel; and construction materials. Not only has the inflation rate in these categories been greater than the average, but in view of the renovations that owners have undertaken to keep their cottages up to date or to convert them to permanent residences, the average expenses per household were significantly higher in this category in 2014.

The **categories with the highest proportion of expenses** by respondents are:

- food, excluding restaurant expenses (87%);
- gas and fuel (79%);
- hardware and construction materials (76.7%);
- alcohol, wine and spirits, excluding alcohol expenses at the restaurant (76.3%);
- restaurants (73%).

The **most significant average expenses** remained virtually the same:

- hardware and construction materials ($2,995);
- food ($2,703.20);
- gas and fuel ($2,586.94);
- alcohol ($1,144.04);
- and the purchase of and repairs to motor vehicles ($11,051.09), which is logical given the very high costs of products relating to this particular category.

More than **two-thirds of expenses are incurred within the RCM** (66.6%), especially regarding expense categories that are favoured by the close proximity of the business and the secondary residence such as:

- home maintenance services (89.5%);
- hardware and construction materials (84.1%);
- purchase of and repairs to motor vehicles (78%).

The following **business outflow** warrants specific attention, as fewer than 50% of vacationers spend money in the RCM for these categories of goods and services:

- gas and fuel (49.1%);
- beauty and health products (49.1%);
- leisure equipment and accessories (47.1%).

In comparison with **2005**:

- the **proportion of households spending** during a stay at their secondary residence or specifically for their secondary residence **has stayed somewhat the same or declined** in all categories except:
  - hardware and construction materials (up);
  - home maintenance services (up)
- The **average household** expenses **increased or remained stable** in all categories, except for clothing, footwear and accessories, which declined;
- the **proportion of expenses incurred inside the RCM increased** in most categories or remained stable, with the exception of the:
  - proportion of restaurant expenses in the RCM which declined;
  - the proportion of leisure equipment and accessory expenses which declined.

5.3.2 Breakdown of expenses between campers and cottage owners

The following table shows the total expenses of vacationer households (campers and secondary residence owners) in the Gatineau Valley RCM for various categories of goods and services. Since campers were not surveyed in 2014, we are hypothesizing that the proportion of expenses in each of the categories is the same as in 2005. We are also assuming that the proportion of total expenses by campers and cottage owners is the same as in 2005 (10.1% and 89.9% respectively).

Total expenses of vacationers in the RCM

Type of expense		Total expenses of households in the RCM		
	2005 hypothesis (campers)	Projections based on the 2005 hypothesis (campers)	Cottage owners	Total
Food excluding restaurant expenses	20.2%	1 182 089.51	11 369 788.95	12 551 878.46
Gas and fuel	12.3%	716 396.49	7 950 103.81	8 666 500.31
Alcohol, wine and spirits, excluding alcohol expenses at a restaurant	7.9%	459 368.46	5 083 987.92	5 543 356.37
Restaurants	10.7%	626 060.46	1 445 535.70	2 071 596.16
Hardware and construction materials	10.3%	601 770.53	15 765 137.91	16 366 908.44
Horticulture products, flowers and plants	0.8%	45 345.73	429 588.66	474 934.39
Sports items (accessories, clothing, etc.)	2.3%	132 697.20	510 548.51	643 245.71
Beauty and health products including drugs	1.4%	82 350.31	701 450.82	783 801.13
Leisure equipment and accessories such as computer equipment, books and toys	1.3%	77 749.94	563 655.50	641 405.44
Residence maintenance services (grass cutting, security, snow removal, etc.)	0.1%	4 852.44	1 469 969.65	1 474 822.09
Clothing, footwear and accessories including jewelry	2.3%	135 989.30	256 551.09	392 540.39 1
Furniture, electrical appliances & decoration accessories	0.4%	25 706.58	083 902.33	1 109 608.91
Purchase of and repairs to motor vehicles (auto, motorcycles, quads, boat, etc.)	29.9%	1 747 505.82	5 131 442.40	6 878 948.22
Parts, tires and accessories for vehicles/automobiles	N/A	N/A	201 273.48	201 273.48
Total	**100%**	**5 837 883**	**51 962 936.72**	**57 800 819**
Average household expense	**--**	**N/A**	**8 302.11 $**	**N/A**
Proportion	**--**	**10.1%**	**89.9%**	**--**

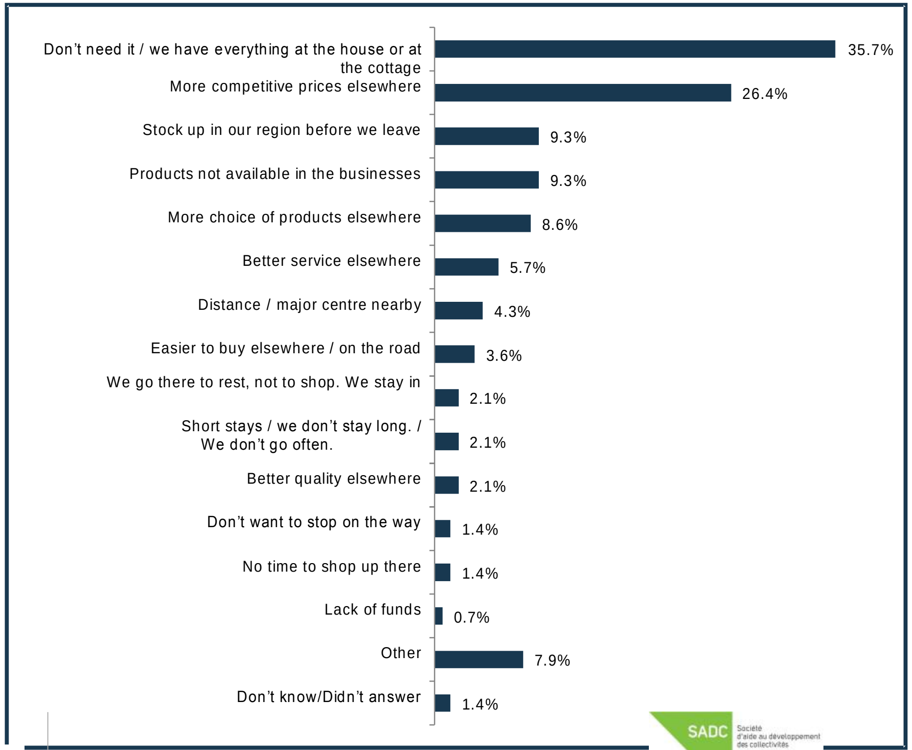
5.3.3 Reasons for spending outside the RCM

Categories of regular goods and services*

Respondents who spent less than 40% on purchases in the Gatineau Valley RCM in one of the categories of regular goods and services pointed out that they buy outside the RCM because they did not need these products, as they already had them at home or at the cottage (35.7%). Other reasons cited were more competitive process outside the RCM (26.4%) and the non-availability of products or a lack of store diversity in the RCM (9.3%).

**Food and alcohol, excluding expenses at the restaurant, beauty and health products, gas and fuel, leisure equipment and accessories.*

Q10. What were your reasons for not spending more in the Gatineau Valley RCM for the previously mentioned categories of goods and services? (basis: vacationers spending less than 40% in one of these categories of goods and services in the Gatineau Valley RCM, n=140)

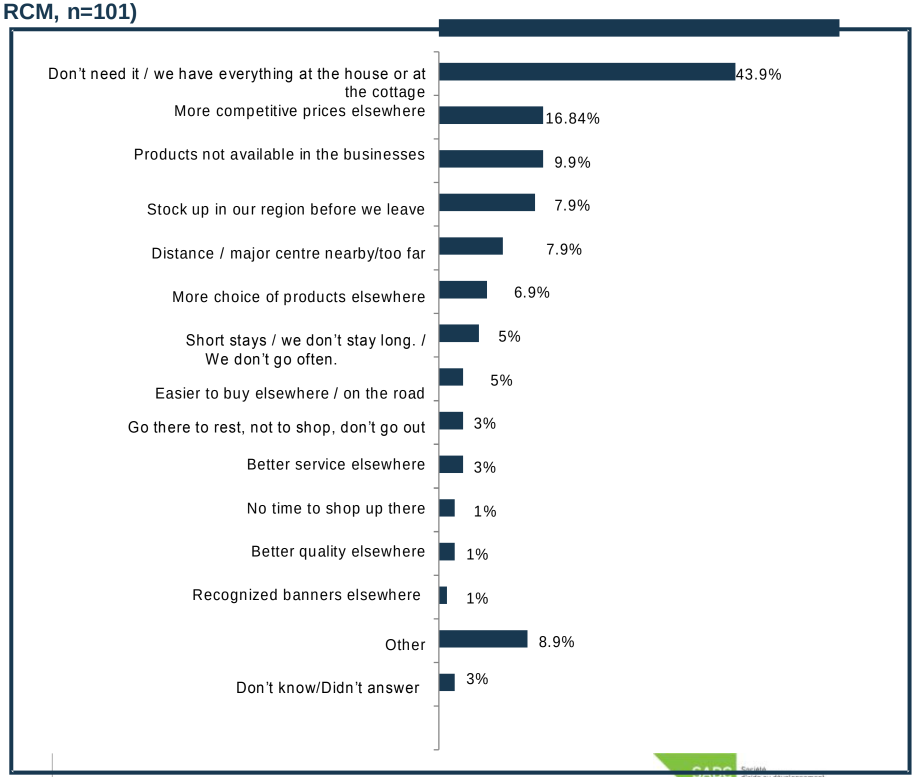


Other categories of goods and services*

Respondents who spent at least 40% in one category on purchases outside the Gatineau Valley RCM for other goods and services pointed out that they mainly buy outside the RCM because they did not need these products, as they already had them at home or at the cottage (43.6%). Other reasons cited were more competitive prices outside the RCM (16.8%) and the non-availability of products or a lack of store diversity in the RCM (9.9%).

**Restaurants, hardware, horticulture products, electrical appliances, furniture, decoration accessories, home maintenance services, purchase of and repairs to motor vehicles, clothing, footwear and accessories, sports items and clothing, car parts.*

Q16. What were your reasons for not spending more in the Gatineau Valley RCM in the previously mentioned categories of goods and services? (basis: vacationers spending less than 40% in one of these categories of goods and services in the Gatineau Valley RCM, n=101)



The reasons cited in the previous two questions differ from those provided in the 2005 survey, mainly because it was decided not to read the answers they had as an option. Their answers were spontaneous. Nonetheless, the price issue emerged once again as one of the most cited factors.

5.4 Level of satisfaction and unmet needs

5.4.1 Level of satisfaction with stores in the Gatineau Valley RCM

It was noted that, overall, there was **a high rate of satisfaction with most types of businesses** in the Gatineau Valley RCM. The types that vacationers spending at least 40% in their category were most satisfied with:

- food stores (96.5%);
- hardware and construction material stores (95.2%);
- stores selling alcohol and wine (91.1%).

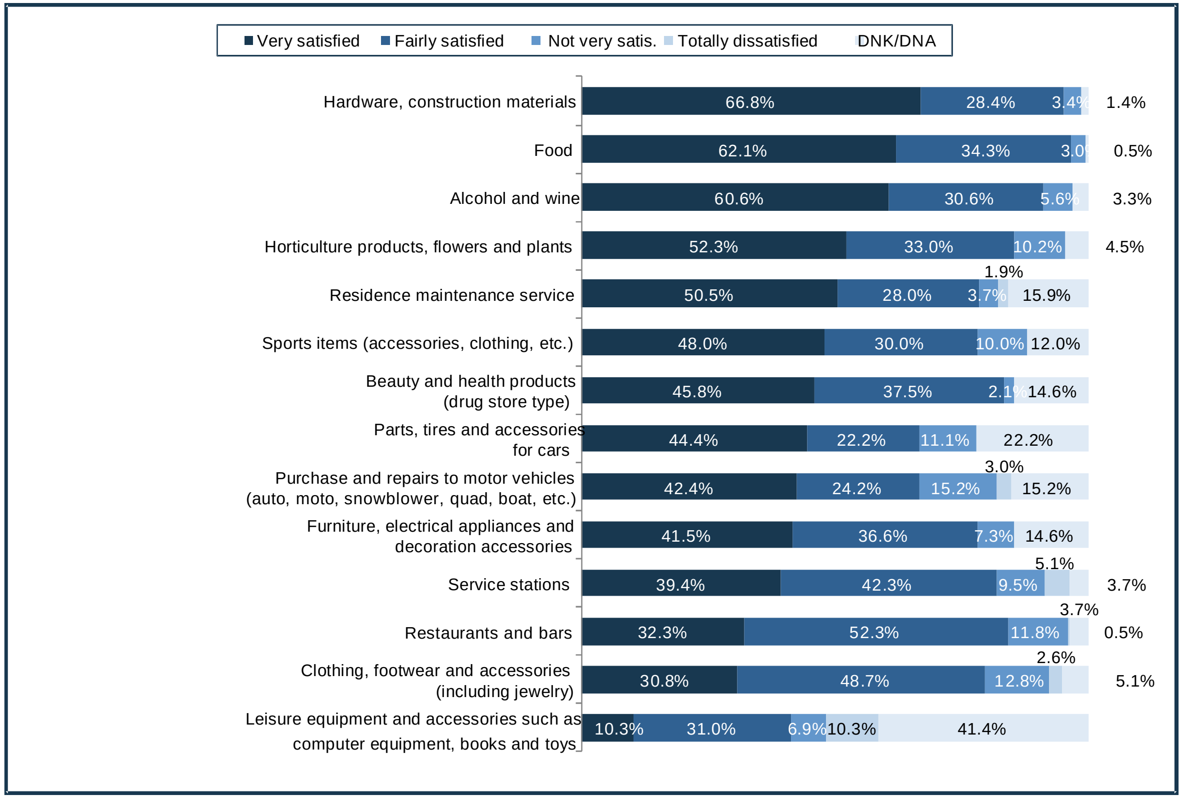
Satisfaction is also high with other types of businesses (between 78% and 85.2%). However, **there is less satisfaction with**:

- businesses selling and repairing motor vehicles (66.7%);
- businesses selling parts, tires and accessories for cars (66.7%);
- stores selling leisure equipment and accessories (41.4%).

In comparison with the 2005 survey findings, respondents indicated they were **more satisfied** with **beauty and drug store type health products** but **less satisfied** with:

- restaurants (slight drop);
- furniture, electrical appliances and decoration accessories;
- leisure equipment and accessories
- horticulture products, flowers and plants;
- purchase of and repairs to motor vehicles;
- clothing, footwear and accessories.

Q17. When you make purchases in the Gatineau Valley RCM, how satisfied are you with the following types of stores? (basis: vacationers spending at least 40% in one of these categories of goods and services in the Gatineau Valley RCM)

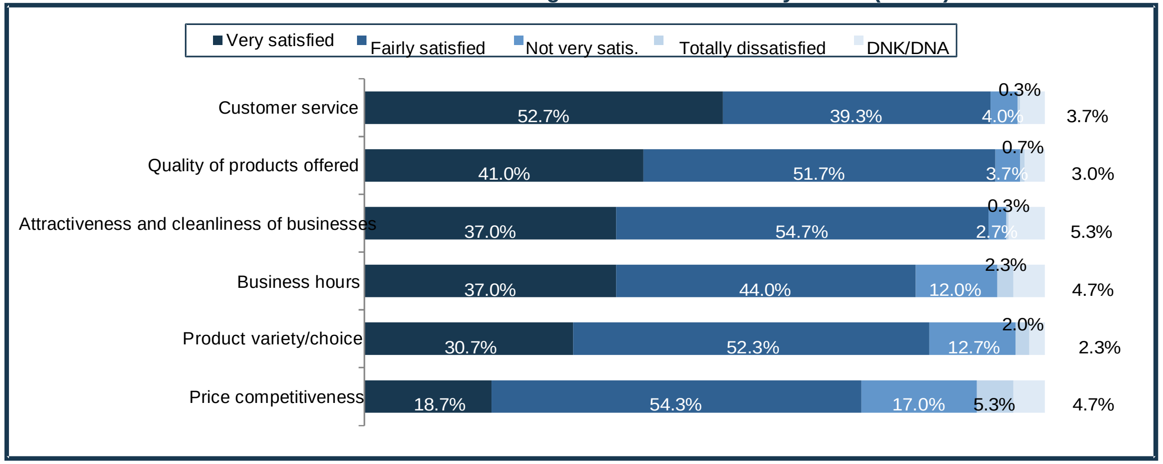


5.4.2 Level of satisfaction with the commercial offering in the Gatineau Valley RCM

Generally speaking, vacationers favourably perceive the commercial offering in terms of the **quality of products offered** (92.7%), **customer service** (92%) and **the attractiveness and cleanliness of businesses** (91.7%).

In comparison with the 2005, the **findings are similar** with respect to customer service and business hours, but **all of the other aspects were perceived somewhat more favourably** in 2014. Once again, **price competitiveness received the lowest rating**, although businesses have improved on this score since 2005.

Q18. Generally speaking, would you describe yourself as very satisfied, fairly satisfied or not at all satisfied with the commercial offering in the Gatineau Valley RCM? (n=300)



5.4.3 Unmet needs

More than one-third of vacationers are satisfied with the current commercial offering and are not hoping for new types of businesses to set up in the area (37.3%). However, 10.7% would like to see a family restaurant or a fast food restaurant open and 8.3% would like to have a hardware store. Another 8% of vacationers would like to have a gas station with or without a convenience store or a garage.

Unlike in 2005 when vacationers said they were interested in stores selling fruits and vegetables, baked goods, butcher ships and locally grown products, these items were not spontaneously cited by the vacationers surveyed in 2014.

Q19. What types of stores or services would you like to have in the Gatineau Valley RCM? (n=300)

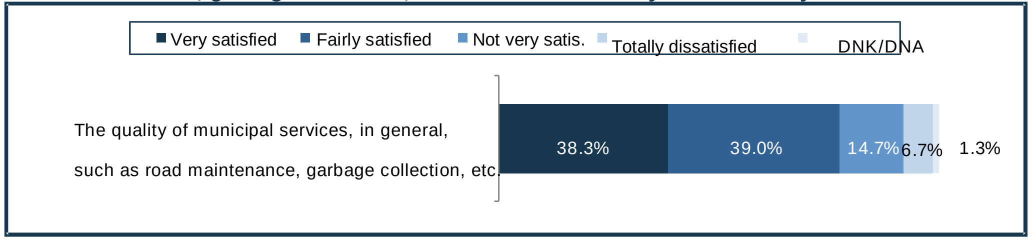
	% of respondents
Family restaurant / fast food / restaurants	10.7%
Hardware store	8.3%
Gas station / gas station with a convenience store / garage	8.0%
Store selling sports clothing and items	6.7%
Big-box stores (Wal-Mart, Costco, Sears, The Bay, etc.)	6.3%
Supermarket / grocery store	6.0%
Fruit and vegetable store	3.7%
Bakery and pastry shop	3.7%
Café	3.7%
Regional public market	2.3%
Drug store / medical clinic	2.0%
Butcher shop / cheese shop	1.7%
Book store	1.7%
Crafts boutique	1.3%
Store selling local products	1.3%
Horticult. store /boat repairs /jet	1.3%
SAQ	1.0%
Bistro/bars or dance clubs	1.0%
Tourist attractions	0.7%
Mobile mechanic service that makes house calls	0.7%
Bank	0.7%
Gym / Yoga	0.7%
Plumber	0.7%
Other	12.7%
None	37.3%
Don't know/Didn't answer	12.3%

5.4.4 Satisfaction with municipal services

Overall, 77.3% of vacationers are **satisfied with the quality of municipal services** offered by the municipality where their secondary residence is located, and 21.3% are less so.

In 2005, 75.1% were satisfied with garbage collection and 54.7% with road maintenance and condition. Although the findings have been combined today, satisfaction with the **second item, roads, has improved.**

Q22. How satisfied are you with the quality of municipal services provided such as road maintenance, garbage collection, etc. in the area where your secondary residence is located? (n=300)

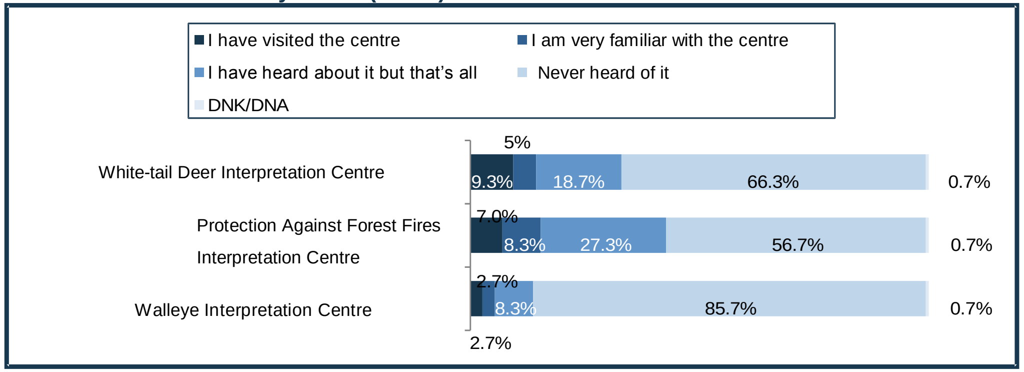


5.5 Protection of the environment

5.5.1 Extent of familiarity with the interpretation centres

The best known natural interpretation centres on Gatineau Valley RCM territory are the **Protection Against Forest Fires Interpretation Centre** (42.7%) followed by the **White-tail Deer Interpretation Centre** (33%) and the **Walleye Interpretation Centre** (13.7%).

Q20. How familiar are you with the following interpretation centres located on the Gatineau Valley RCM? (n=300)

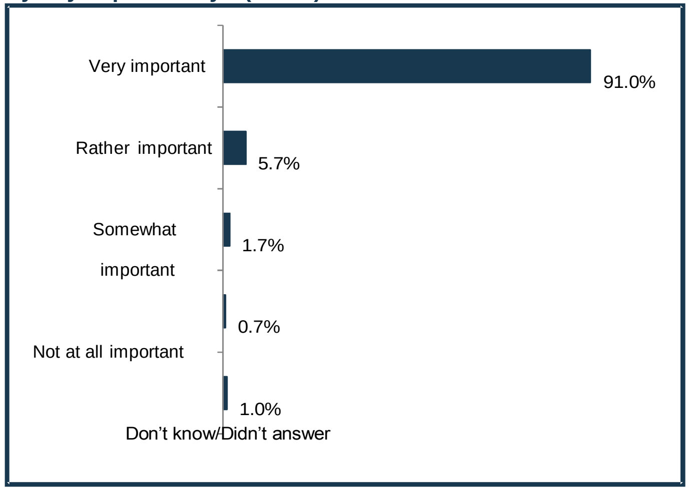


It was noted that those familiar with various interpretation centres are more likely to be **French-speaking** and **retirees**.

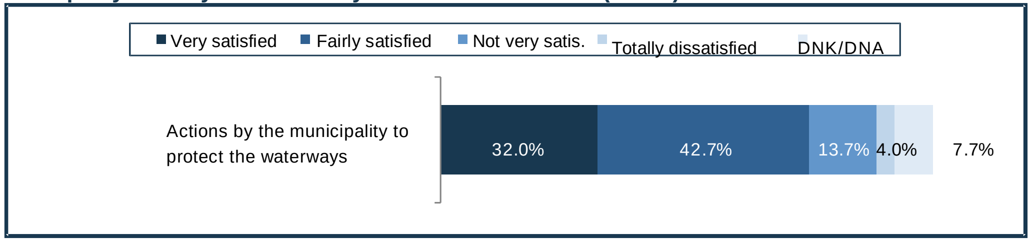
5.5.2 Protection of waterways

The **protection of waterways** in the Gatineau Valley RCM is **important** to 96.7% of vacationers. 74.7% say they are **satisfied with what the municipality is doing on this issue**, while 17.7% are less so.

Q21. How important is the protection of waterways in the Gatineau Valley to you personally? (n=300)



Q22. How satisfied are you with what the municipality is doing to protect waterways in the municipality where your secondary residence is located? (n=300)



5.6 Communication with vacationers

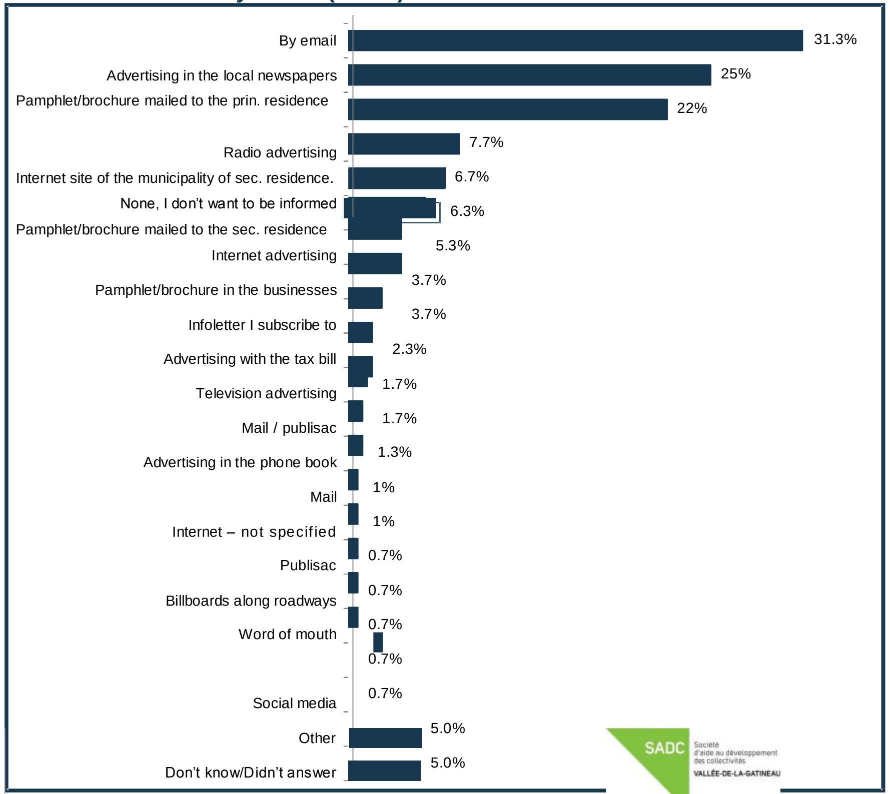
5.6.1 Informing vacationers

Emails (31.3%) and advertising in local newspapers (25%) are the preferred means of informing vacationers of new businesses and services offered in the Gatineau Valley RCM. Mailing pamphlets to the vacationers' principal residence is also another option that can be considered.

Email is a medium that is preferred, in particular, by:

- the **better educated** (university, 36.9%);
- people **under 55**, (47.5%);
- those with the **highest incomes** ($80,000 and over, 40%)
- **English** speakers (41%);
- Those living with **children** (51.7%);
- Those who are **employed** (38.4%).

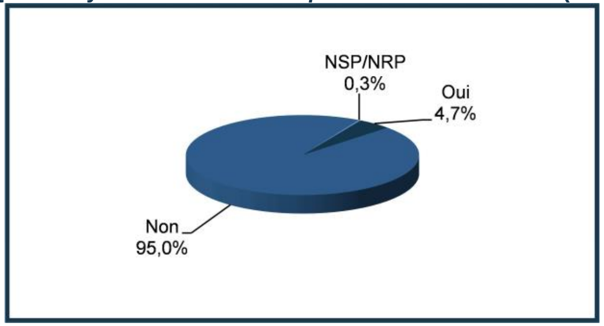
Q23. How would you like to be informed of new businesses and services offered in the Gatineau Valley RCM? (n=300)



5.6.2 Familiarity with promovallee.com

The *promovallee.com* is unknown to all but 4.7%.

Q24. Are you familiar with the *promovallee.com* site? (n=300)



Yes, No, DNK/DNA

5.7 Quality of telecommunications service in the region

5.7.1 Internet connection

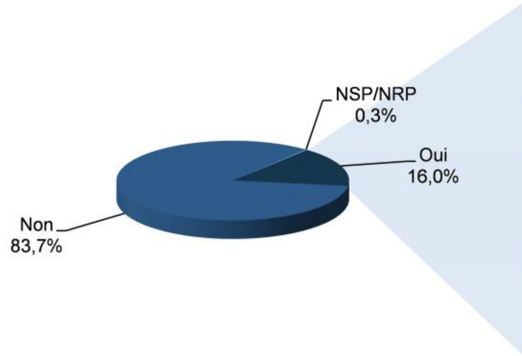
Only **16% of secondary residences have an Internet connection, and 83.7% do not**. Though few vacationers are connected, 59.7% do believe it is important to have the Internet in their secondary residence.

Of those vacationers who do have the Internet:

- 41.7% have a high speed or faster connection
- 12.5% have an **intermediate** connection
- 8.3% have **telephone** connection; and
- 16.7% connect to the Internet with a **3G system**

Q25. Do you have an Internet connection at your secondary residence? (n=300)

Q26. What is the connection speed? (basis: vacationers with the Internet in their secondary residence, n=48)



	% des répondants
Haute vitesse	20,8%
Système 3G	16,7%
Très haute vitesse	14,6%
Vitesse intermédiaire	12,5%
Connexion téléphonique	8,3%
Vitesse extrême	6,3%
NSP/NRP	20,8%

% of respondents/ high speed/ 3G system/ very high speed/ intermediate speed/ telephone system/ Ultra high speed/ DNK/DNA

Commenté [o2]: Couldn't put these in the table.

More vacationers have an Internet connection in the following groups:

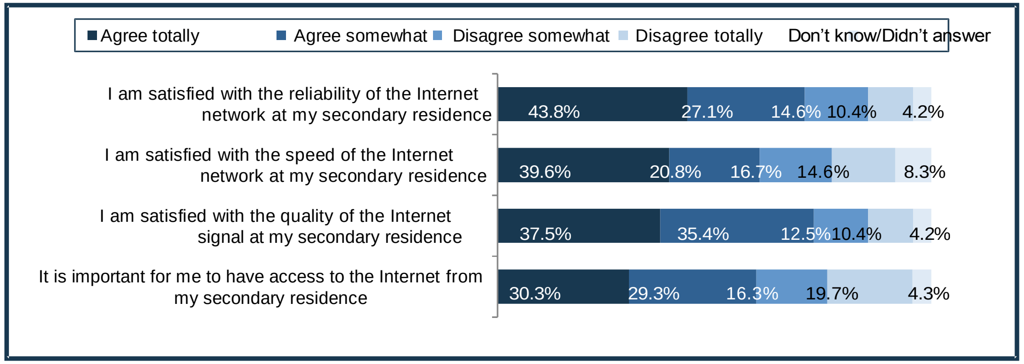
- the better **educated** (university, 23.1%);
- the **highest income earners** ($80,000 and over, 21.5%);
- **English** speakers (22.2%);
- those **who don't live** with a **child** under 18 (18.2%).

Most vacationers with an Internet connection in their secondary residence seem to be generally **satisfied with their Internet connection**:

- **72.9%** are satisfied with the signal **quality**
- **70.8%** are satisfied with the network **reliability**

A slightly smaller proportion of vacationers are satisfied with the **speed** of the Internet connection (60.4%).

Q27. How much do you agree with the following aspects of the Internet connection in your secondary residence? (sub-questions a,b.c: basis: vacationers with an Internet connection in their secondary residence n=48) (sub-question d: n=300)



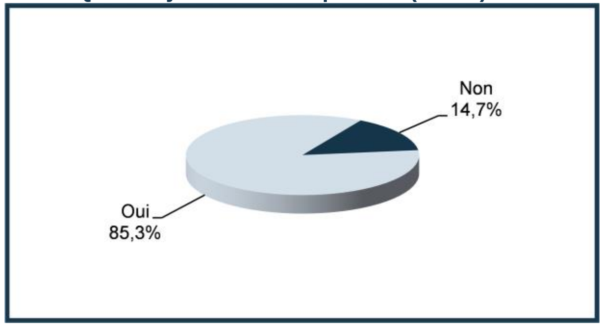
Vacationers in the groups with the following characteristics believe it is more important to have access to the Internet from their secondary residence:

- the better **educated** (university, 69.4%);
- the **highest income earners** ($80,000 and over, 75.6%);
- **English** speakers (70.8%);
- those who go to their secondary residence more often (10 stays and over, 64.1%)

5.7.2 Cellular network

Most vacationers have a cell phone (**85.3%**) but 14.7% do not.

Q28. Do you own a cell phone? (n=300)



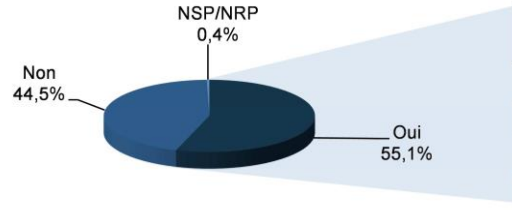
A greater proportion of vacationers have a cell phone in the following groups:

- the **highest income earners** ($80,000 and over, 91.9%);
- **English**-speakers (90.3%);
- the **employed** (89%).

Slightly more than half of vacationers who have a cell phone do **have access to the cellular network in their secondary residence** (55.1%), while **44.5% do not.** **The quality of the cell phone signal and reception** in secondary residences in the Gatineau Valley RCM **could stand improvement** because only 52.5% of vacationers term the quality of the signal and reception “good” or “very good”. 47.5% describe it as poor.

Q29. Do you have access to the cellular network in your secondary residence? (base: vacationers owning a cell phone n=256)

Q30. How would you evaluate the quality of the signal and reception of your cell phone at your secondary residence? (basis: vacationers who have access to the cellular network in their secondary residence n=141)



	% des répondants
Très bonne	34,8%
Bonne	17,7%
Plutôt mauvaise	28,4%
Très mauvaise	19,1%

% of respondents - Very good, good, rather poor, very poor

6. Major observations and possible courses of action

An analysis of the survey findings yielded the following portrait of vacationers. They are going to their secondary residences as often as in 2005, but they are staying longer. More than one-third of vacationers are planning on going to their secondary residence more often in the next three years, and close to one in five are thinking about settling in the Gatineau-Valley RCM in the next five years. This should represent increased potential business for the RCM.

Although vacationers overall are satisfied with the current commercial offering and are steadily increasing their spending in the Gatineau Valley RCM, they did suggest how improvements could be made. These recommendations, which appear on the following pages, deal with the commercial offering, communications, Internet access and protection of the waterways.

6.1 Commercial offering

Overall, vacationers are spending more in businesses in the Gatineau Valley RCM, and they are more satisfied with the current commercial offering than they were in 2005. One weakness in this area relates to price competitiveness. Though businesses have made strides since 2005, many vacationers who do not spend in the RCM pointed to higher prices (particularly for gas) as the reason.

A rather sizeable proportion of vacationers claimed they don't spend in the RCM, as some products or stores are not available. Many would like to see more fast food or family restaurants. The same applies to the numbers of gas stations (especially those that provide vehicle repair services). We noted that the restaurant business has seen more money flow out of the RCM than in 2005.

Making the commercial offering more attractive

The study revealed that vacationers were very satisfied with large-volume businesses in key categories (food, hardware, alcohol and wine). However, they reported they were less satisfied with businesses in the following categories than in 2005:

- Restaurants (offer, quality, service);
- furniture, electrical appliances and decoration accessories;
- leisure equipment and accessories;
- horticulture products, flowers and plants;
- vehicle purchases and repair
- clothing, footwear and accessories

Many vacationers purchase leisure equipment and accessories in the city where there is more choice and greater variety, not to mention better prices. Online purchases in this category have also increased.

Clothing, footwear and accessories are also purchased in the city closer to the vacationers' place of residence for the same reasons. Moreover, vacationers do not spend much on goods of this type when they come to their cottages, as they tend to wear clothes nearing the end of their useful life.

Businesses must be encouraged to come up with attractive offers with some exclusive features, and especially offer vacationers unparalleled service, a unique purchasing and visit experience with a down-to-earth and local touch in businesses where decreased satisfaction was noted. Various courses of action are proposed hereunder.

Stand out with hospitable businesses with unique profiles

When it comes to competing with big box stores, several sources recommend that the focus should essentially be on offering specialized, exclusive or sought-after products that are not in the larger banners, along with unparalleled, effective and warm customer service. Instead of going the route of copying the competition by offering diversified products, it is recommended instead that they set out a range of specific products that would be associated with an independent store. Customer service is another aspect that warrants attention. For starters, competent and motivated staff is needed in order to meet the clients' needs and to offer each one of them a personalized experience. Many respondents cited some businesses they would go out of their way for to receive attentive and personalized service. This would be worth emulating. More than ever, consumers are looking for an experience when they shop, and small businesses could use this to their advantage, which would give them a leg up on online businesses and large chains.

The vacationers we met with also deplored the lack of atmosphere in Gatineau Valley villages, which provides them with no incentive to visit, other than to buy something they wanted along the road. They mentioned villages such as Westport and Wakefield as examples of what would attract them, with a trendy village nucleus where people can stroll about and stop into a series of small stores and restaurants where various events are taking place.

This will require that the Gatineau Valley take a concerted approach to develop the centre cores of villages and streets with attractive and festive environments.

Quality restaurants

Focus groups were held with vacationers, and several pointed out that good restaurants they enjoyed unfortunately closed down recently and that the quality and service in some others had declined, which caused some dissatisfaction. They would like to see restaurants that provide an atmosphere and are not too expensive (ideally along the main road). The offerings of restaurants (particularly family restaurants) in the Gatineau Valley should be significantly improved, with a varied menu of advanced fine cuisine dishes.

According to some participants in the focus groups, some places bordering the lake would have much to gain if more use were made of them. They could offer a calm and peaceful atmosphere with a view overlooking the lake, where diners would have an experience all their own. Again, atmosphere and experience are still key variables when it comes to restaurants.

As mentioned previously, some focus group participants noted that the quality and variety of offerings of restaurants in the region have declined. Quality is becoming increasingly important in the restaurant business. People want to eat well and consume local products that are “in style”. Gatineau Valley restaurants would benefit by offering locally grown and healthy food and showcase it in an attractive menu. This would be in step with an increasing trend and would give local purchases a boost at the same time. Restaurants can also gain by projecting a “greener” and more responsible image (which vacationers appreciate), as local purchases have less of an impact on the environment and encourage local producers.

Loyalty card to promote local purchases

Local purchases have been making significant headway in recent years, and the figures bear this out. According to the Protégez-vous magazine, 60.1% of Quebeckers made local purchases in the past year whenever possible, and 60.9% opt to purchase nearby. Several municipalities in Quebec and in the rest of Canada have implemented local purchasing programs (e.g., Priorité Lévis, Priorité Laval, Priorité Sherbrooke), which encourage people to buy locally. Various incentives such as participation in contests, discounts on purchases in local stores and accumulation of loyalty points on cards promote local purchases and give business owners access to a broader clientele. A Gatineau Valley business owners association could establish a similar program to encourage residents and vacationers to buy from local businesses. By promoting the card, the business owners increase awareness of the commercial offering in the region, and consumers would be more aware and inclined to buy locally. An initiative that specifically targets vacationers could also be given consideration.

Advertising addressed to vacationers

Advertising that promotes businesses and is specifically addressed to vacationers could be developed. In addition, locating them on a map and publicizing various promotions would encourage vacationers to try new businesses. Vacationers who took part in the focus groups were often surprised to learn of attractive businesses they had never even heard of. It is therefore essential that these original businesses be distinctively featured on the Web, in a pamphlet or on a centralized posting.

6.2 Communications

To inform vacationers of new commercial offerings, it is recommended that emails be sent, particularly to reach better educated and well-off active people. Traditional methods such as brochures sent to the principal residence and the publication of ads in local newspapers should not be discontinued.

Efforts to promote the *promovallee.com* portal could also be undertaken as vacationers are currently unaware of it, in spite of it being new. Offering visitors to the site an opportunity to sign up for an infoletter could be one option to consider, particularly to make it easier to send emails to vacationers.

More should be done to broaden the exposure of the various interpretation centres or cultural businesses, and the targeted clientele should also be made up of vacationers, not just tourists.

Finally, it is recommended that efforts be stepped up to reach the pool of potential vacationers in the Ottawa-Gatineau CMA, which is significant judging by the data in chapters 3 and 4. Targeted communication activities would encourage them to choose the Gatineau Valley RCM for their secondary residence, and they could even decide to settle in the region. But first, they could simply be encouraged to pay a visit and take in a unique experience that would be organized around a theme or an event.

6.3 Access to the Internet and the cell phone network

Very few vacationers have an Internet connection at their secondary residence, even though a significant number of them believe that having Internet access at the secondary residence is important. Those who do have access nonetheless seem satisfied with the quality and reliability of the signal and the network, although speed could stand improvement. The discussion group findings revealed that some vacationers would like to have Internet access but cannot, while others have made a decision not to have the Internet at the cottage.

Close to one half of vacationers with a cell phone do not have access to it from their secondary residence, mainly due to the lack of a signal that is blocked by the mountains. Moreover, those who do have access did not rate the quality of the signal and reception too highly. Once again, there is room for improvement.

It is important that these problems be addressed, as they could stand in the way of people who would like to settle in the Gatineau Valley RCM or even lengthen their stays, as they would telework.

6.4 Protection of waterways

Vacationers attach significant importance to protecting waterways in the Gatineau Valley RCM. For the time being, most seem to be satisfied with the efforts made to this end by the municipality where their secondary residence is located, even though the focus group findings did uncover some discontent with municipal services and protection of the environment. Nonetheless, vacationers are satisfied with public services such as road services by municipalities in the RCM. It is therefore important that this trend continue.

Generally speaking, perceptions, values and attitudes do differ between vacationers and residents on a certain number of points, particularly protection of the environment, ecological behaviours and regulations, and these differences could cause tension and conflict in certain cases.

Vacationers chose the Gatineau Valley, in general, for its natural cachet and the quality of the environment. They are thus inclined to demand clear regulations, enforcement by the authorities and compliance by everyone.

Traditional residents see these regulations as constraints and impediments to their freedom of enjoyment of their property. These differences also emerged in some municipalities regarding the management of the territory and services.

It would be important that a consistent picture be developed to arrive at a coordinated approach on this issue and to deliver consistently on a promise to arrive at sustainable management and quality services. Steps shall be taken to explain it and disclose it to the residents so that it does not come across as “fantasy” by the vacationers. It shall also be explained clearly to the vacationers to avoid any emotional reactions and unrealistic expectations on their part.

Appendix 1: Methodology

Activity 1: Update of the 2005-2006 study data (sociodemographic profile and household expenses

The first activity involved updating the 2005-2006 study data (chapters 3 and 4 herein). The portrait of Gatineau RCM vacationers was updated with research done using the PCensus software (2013 data) that uncovered official statistical data from the census and the household expenses survey by Statistics Canada. The Gatineau Valley SADC also provided information. The evolution in the number of vacationers and the increase in the property evaluations in the RCM were also analyzed.

Activity 2: Survey of Gatineau Valley RCM vacationers

A telephone survey of Gatineau RCM vacationers was conducted to quantify the market once again and update the 2005-2006 study.

ADAPTATION OF THE 2005 QUESTIONNAIRE

An adaptation of the questionnaire used during the 2005 survey was developed to quantify the Gatineau Valley region market. The questionnaire, which lasts no more than 15 minutes, produced a purchasing and consumption profile of vacationers in the region and addressed some themes agreed to with **Gatineau Valley SADC** representatives.

ADMINISTRATION OF THE TELEPHONE SURVEY

Using a list of addresses of slightly more than 6000 vacationers provided by SADC, **Zins Beauchesne and Associates** conducted a telephone survey that 300 vacationers took part in. This sample size made it possible to keep the margin of error around ± 5.5% 19 times out of 20. The survey response rate was 41.5%.

PROCESSING OF FINDINGS

Single frequencies were drawn for all of the observations from the previously purged and audited data file. Moreover, bivariate analyses were performed to obtain the frequencies of some sub-groups predetermined from the population studied and to test any differences among them, e.g. based on sex, age, household income and the respondent's education). The findings appear in a separate appendix herein.

Activity 3: Strategic analysis and report

This activity involved writing this report. The data processed during the survey and that produced by the secondary data research (Statistics Canada and property assessment data) were analyzed. This report deals with the following:

- an introduction and reminder of the study objectives;
- a sociodemographic portrait of Gatineau Valley RCM vacationers and their evolution since 2006;
- the update of Gatineau Valley RCM vacationers' expenses;
- an analysis of the vacationers' survey findings regarding their purchase behaviours and their perceptions of some municipal issues and services;
- a conclusion and strategic objectives.

The appendices also include:

- a reminder of the methodology;
- a final version of the survey questionnaire;
- all statistical data and detailed statistical tables presented in cross-table format

Activity 4: Focus groups with vacationers

To delve more deeply into some of the survey findings and gain a better understanding of the vacationers' purchasing and spending behaviours along with their expectations regarding some services, two discussion groups were held with Gatineau Valley RCM vacationers in Ottawa, which included vacationers living in the Gatineau or Ottawa region (the main market where the vacationers come from) in a room specially fitted up for the purpose. The findings of the focus group sessions appear in a document separate from this report.

Appendix 2: Survey questionnaire

CONSUMER SURVEY – FINAL QUESTIONNAIRE

INTRODUCTION

Hello, this is _____________ from **Zins Beauchesne and Associates** research firm. We are currently conducting a study on the buying habits of cottage or secondary residence owners in the Gatineau Valley RCM (Regional County Municipality). According to public data from the assessment roll, you own a secondary residence or cottage in the Gatineau Valley RCM. We would like to ask you a few questions on that topic; all of your answers will remain confidential. This questionnaire will not take more than a few minutes of your time.

ASK TO SPEAK TO THE PERSON **IN CHARGE OF DOING THE SHOPPING** FOR THE HOUSEHOLD.

*If necessary, explain that these data are public, come from municipal agencies and were provided to us by the Gatineau Valley SADC.

CURRENT AND FUTURE SECONDARY RESIDENCE VISITING HABITS

1. Secondary residence municipality

2. Postal code of the principal residence

3. In the past year (last twelve months), how many times did you stay longer than 24 hours at your secondary residence or cottage in the Gatineau Valley RCM?_____________ [***If = 0 Thank and end]***

4. On average, how many nights did you stay during each visit? _ _ nights

5. Including yourself, how many people generally stay at your cottage or secondary residence when you visit it? _ _ people

6. In your opinion, will the frequency of your visits to your cottage decrease, remain stable or increase in the next three years?

■ *Decrease	1
■ *Remain stable	2
■ *Increase	3
■ *DNK/DNA	99

7. In the next five years, do you intend to live permanently in the Gatineau Valley RCM?

■ Yes	1
■ Maybe	2
■ No	3
■ *DNK/DNA	99

CONSUMER HABITS BY EXPENSE CATEGORY

8. I am now going to read you some expense categories. First, please tell me how much your household spent on average <u>per visit</u> to your secondary residence last year in each of these categories.

   Second, tell me what percentage (out of 100%) of that amount was spent at businesses in the Gatineau Valley RCM, which extends from the Town of Low to the south up to Parc de La Vérendrye to the north and from 31 Mile Lake to the east up to Eagle Forest to the west.

Expense categories	a) Average expenses per visit to the secondary residence	b) Percentage of purchases at businesses in the RCM	DNK/DNA
■ Food, excluding food expenses at restaurants	$_ _ *Si =0 go to the next item*	_ _ _%	999
■ Alcohol, wine and liquor, excluding alcohol expenses at restaurants	$_ _ *Si =0 go to the next item*	_ _ _%	999
■ Beauty and health products, including medication	$_ _ *Si =0 go to the next item*	_ _ _%	999
■ Gas and fuel	$_ _ *Si =0 go to the next item*	_ _ _%	999
■ Recreational materials and accessories such as computer equipment, books and toys	$_ _ *Si =0 go to the next item*	_ _ _%	999

9. [si ≥50%] Where did you mainly purchase the goods and services in the following categories?

Expense categories

- [si ≥550%] Food, excluding food expenses at restaurants Note : ______________
- [si ≥550%] Alcohol, wine and liquor, excluding alcohol expenses at restaurants Note : ______________
- [si ≥550%] Beauty and health products, including medication Note : ______________
- [si ≥550%] Gas and fuel Note : ______________
- [si ≥550%] Recreational materials and accessories such as computer equipment, books and toys Note : ______________

10. [Si <40% in at least one of the preceding categories] What were your reasons for not spending more in Gatineau Valley in the previously mentioned categories of goods and services?

■ Greater selection of products elsewhere	1
■ Well-known banner stores elsewhere	2
■ More competitive prices elsewhere	3
■ Better quality elsewhere	4
■ Better service elsewhere	5
■ Other (specify : ___________)	97
■ DNK/DNA	99

11. When you stayed at your cottage or secondary residence in the last 12 months, how many times did you go out to eat at a restaurant?_ _ times

12. [if he/she went to the restaurant, if >0] What was the average amount of money you spent? $_ _ _

13. [if he/she went to the restaurant, if >0] What percentage of your restaurant visits were made at restaurants in the Gatineau Valley RCM? _ _ _ %

14. Now, please tell me how much your household spent last year in each of the following categories, <u>specifically for your secondary residence</u>.

Second, tell me what percentage (out of 100%) of that amount was spent at businesses in the Gatineau Valley RCM. *** Read as needed – the RCM extends from the city of Low to the south up to Parc de La Vérendrye to the north and from 31 Mile Lake to the east up to Eagle Forest to the west.

Expense categories	a) Expenses last year for the secondary residence	b) Percentage of purchases at businesses in the RCM	DNK/DNA
■ Hardware, construction materials	$_ _ *Si =0 go to the next item*	_ _ _%	999
■ Horticulture products, flowers and plants	$_ _ *Si =0 go to the next item*	_ _ _%	999
■ Furniture, electrical appliances and decorative items for the home	$_ _ *Si =0 go to the next item*	_ _ _%	999
■ Home maintenance services (lawn mowing, security, snow removal, etc.)	$_ _ *Si =0 go to the next item*	_ _ _%	999
■ Motor vehicle purchase and repair (car, motorcycle, snowmobile, off-road vehicle, boat, etc.)	$_ _ *Si =0 go to the next item*	_ _ _%	999
■ Clothing, shoes and accessories including jewelry	$_ _ *Si =0 go to the next item*	_ _ _%	999
■ Sports equipment and clothing (accessories, clothing, etc.)	$_ _ *Si =0 go to the next item*	_ _ _%	999
■ Parts, tires and accessories for automotive vehicles	$_ _ *Si =0 go to the next item*	_ _ _%	999

15. [si ≥50%] Where did you mainly purchase the goods and services in the following categories?

Expense categories	
■ Hardware, construction materials	Note : ______________
■ Horticulture products, flowers and plants	Note : ______________
■ Furniture, electrical appliances and decorative items	Note : ______________
■ Home maintenance services (lawn mowing, security, snow removal, etc.)	Note : ______________
■ Motor vehicle purchase and repair (car, motorcycle, snowmobile, off-road vehicle, boat, etc.)	Note : ______________
■ Clothing, shoes and accessories including jewelry	Note : ______________
■ Sports equipment (accessories, clothing, etc.)	Note : ______________
■ Parts, tires and accessories for automotive vehicles	Note : ______________

16. [Si <40%%, mais >0$ pour au moins l'une des catégories précédentes] What were your reasons for not spending more in the Gatineau Valley in the previously mentioned categories of goods and services? D

▪ Greater selection of products elsewhere	1
▪ Well-known banner stores elsewhere	2
▪ More competitive prices elsewhere	3
▪ Better quality elsewhere	4
▪ Better service elsewhere	5
▪ Other (specify : ___________)	97
▪ DNK/DNA	99

DEGREE OF SATISFACTION AND UNMET NEEDS

17. When you make purchases in the Gatineau Valley RCM, how satisfied are you with the following types of stores or businesses...

	Not at all satisfied	Not very satisfied	Fairly satisfied	Very satisfied	DNK/ Does not apply
▪ Food	1	2	3	4	99
▪ Alcohol and wine	1	2	3	4	99
▪ Beauty and health products (such as at a pharmacy)	1	2	3	4	99
▪ Furniture, electrical appliances and decorative items	1	2	3	4	99
▪ Clothing, shoes and accessories (including jewelry)	1	2	3	4	99
▪ Restaurants and bars	1	2	3	4	99
▪ Service stations	1	2	3	4	99
▪ Recreational materials and accessories such as computer equipment, books and toys	1	2	3	4	99
▪ Sports equipment (accessories, clothing, etc.)	1	2	3	4	99
▪ Hardware, construction materials	1	2	3	4	99
▪ Horticulture products, flowers and plants	1	2	3	4	99
▪ Home maintenance services	1	2	3	4	99
▪ Motor vehicle purchase and repair (car, motorcycle, snowmobile, off-road vehicle, boat, etc.)	1	2	3	4	99
▪ Food	1	2	3	4	99

For analysis to draw comparisons with 2005. Among those whose expenses in each category exceeded 40% in the Gatineau Valley

18. In general, are you not at all, not very, fairly or very satisfied by the following aspects of the stores or services offered in the Gatineau Valley RCM?

	Not at all satisfied	Not very satisfied	Fairly satisfied	Very satisfied	DNK/ Does not apply
■ Customer service	1	2	3	4	99
■ Business hours	1	2	3	4	99
■ The variety / selection of products	1	2	3	4	99
■ Competitive prices	1	2	3	4	99
■ Beauty and cleanliness of the businesses or services	1	2	3	4	99
■ The quality of the products offered	1	2	3	4	99

19. What types of stores or services would you like to have in the Gatineau Valley RCM? DO NOT READ

■ *Fruit and vegetable stores	1
■ *Bakeries / pastry shops	2
■ *Butchers / cheese shops	3
■ *Handicraft shops	4
■ *Regional public market	5
■ *Local product shops	6
■ *Family restaurants	7
■ *Bistro/bars or dance clubs	8
■ *Sports clothing and equipment stores	9
■ *Entertainment by street performers and festivals	10
■ *Tourist attractions to visit	11
■ *Mobile mechanic service that makes house calls	12
■ *Other (specify: ___________)	97
■ *None	98
■ *DNK/DNA	99

20. In general, are you not at all, not very, fairly or very satisfied by the following aspects of the stores or services offered in the Gatineau Valley RCM?

	Not at all satisfied	Not very satisfied	Fairly satisfied	Very satisfied	DNK/ Does not apply
■ Customer service	1	2	3	4	99
■ Business hours	1	2	3	4	99
■ The variety / selection of products	1	2	3	4	99
■ Competitive prices	1	2	3	4	99
■ Attractiveness and cleanliness of the businesses or services	1	2	3	4	99
■ The quality of the products offered	1	2	3	4	99

21. What types of stores or services would you like to have in the Gatineau Valley RCM?

■ *Fruit and vegetable stores	1
■ *Bakeries / pastry shops	2
■ *Butchers / cheese shops	3
■ *Handicraft shops	4
■ *Regional public market	5
■ *Local product shops	6
■ *Family restaurants	7
■ *Bistro/bars or dance clubs	8
■ *Sports clothing and equipment stores	9
■ *Entertainment by street performers and festivals	10
■ *Tourist attractions to visit	11
■ *Mobile mechanic service that makes house calls	12
■ *Other (specify: ___________)	97
■ *DNK/DNA	99

COMMUNICATING WITH RESPONDENTS

22. How would you like to be informed of new businesses and services offered in the Gatineau Valley RCM?

- No thanks. I do not want to be informed 1
- By a leaflet/brochure mailed to me at my main residence 2
- By a leaflet/brochure mailed to me at my second residence 3
- By a leaflet/brochure available at businesses 4
- By e-mail 5
- By a newsletter I subscribe to 6
- By a radio advertisement 7
- By a television commercial 8
- By a local newspaper advertisement 9
- By an advertisement on the Internet 10
- On the Web site of the city where my second residence is located 11
- By social media (e.g. Facebook, Twitter) 12
- Other (specify : _________) 97
- *DNK/DNA 99

23. Are you familiar with the “promo vallee.com” site?

- Yes 1
- No 2
- *DNK/DNA 99

QUALITY OF TELECOMMUNICATIONS SERVICE IN THE REGION

24. Do you have an Internet connection at your secondary residence?

- Yes 1
- No 2
- *DNK/DNA 99

25. [if connected to the Internet] What is your connection speed at your secondary residence?

■ Extremely fast	1
■ Very fast	2
■ Fast	3
■ Medium speed	4
■ Dial-up connection	5
■ 3G system	6
■ DNK/DNA	99

26. How much do you agree with the following aspects of the Internet connection in your secondary residence?

	Totally disagree	Disagree somewhat	Agree somewhat	Totally agree	DNK/Does not apply
■ I am satisfied with the quality of the Internet connection at my secondary residence	1	2	3	4	99
■ I am satisfied with the reliability of the Internet network at my secondary residence	1	2	3	4	99
■ I am satisfied with the speed of the Internet network at my secondary residence	1	2	3	4	99
■ It is important that I have Internet access at my secondary residence	1	2	3	4	99

27. Do you have a cell phone?

■ Yes	1
■ No	2
■ DNK/DNA	99

28. Do you have access to the cellular network at your secondary residence?

■ Yes	1
■ No	2
■ DNK/DNA	99

29. [if they have access to a cellular network] How would you evaluate the quality of the signal and reception of your cell phone at your secondary residence?

▪ Very good	1
▪ Good	2
▪ Rather poor	3
▪ Very poor	4
▪ DNK/DNA	99

SOCIO-DEMOGRAPHIC AND ECONOMIC CHARACTERISTICS

30. What language do you speak most often at home?

▪ French	1
▪ English	2
▪ Other	3
▪ DNK/DNA	99

31. What level of education have you completed?

▪ Primary school	1
▪ Secondary school (high school diploma, trade school diploma…)	2
▪ CEGEP or technical school (3 year DCS, ACS)	3
▪ University – undergraduate degree	4
▪ University – graduate or postgraduate degree	5
▪ DNK/DNA	9

32. What year were you born in? _ _ _ _

33. a) How many people over the age of 18 make up your household *(including you, if applicable)*? _____

b) How many people under the age of 18 make up your household? _____

34. What is your main occupation? _________________

35. What is your total household income *(income before taxes from all sources, earned by everyone in your household)*?

▪ Less than $30 000	01
▪ $30 000 - $39 999	02
▪ $40 000 - $49 999	03
▪ $50 000 - $59 999	04
▪ $60 000 - $69 999	05
▪ $70 000 - $79 999	06
▪ $80 000 - $89 999	07
▪ $90 000 - $99 999	08
▪ $100 000 and over	09
▪ DNA	99

36. Note the respondent's gender

▪ Male	1
▪ Female	2

THANK AND END