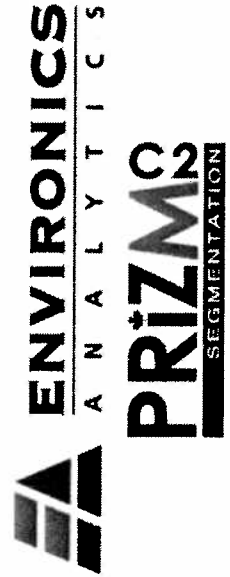


Markham Parks & Recreation Fitness Centre Analysis October 21st 2011

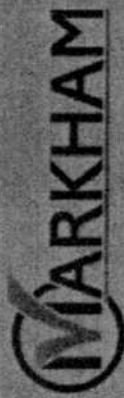
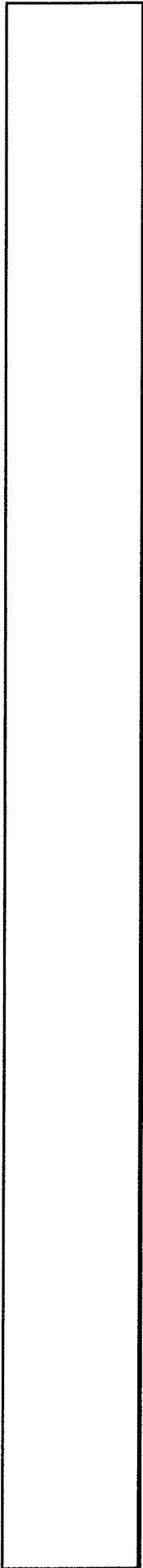
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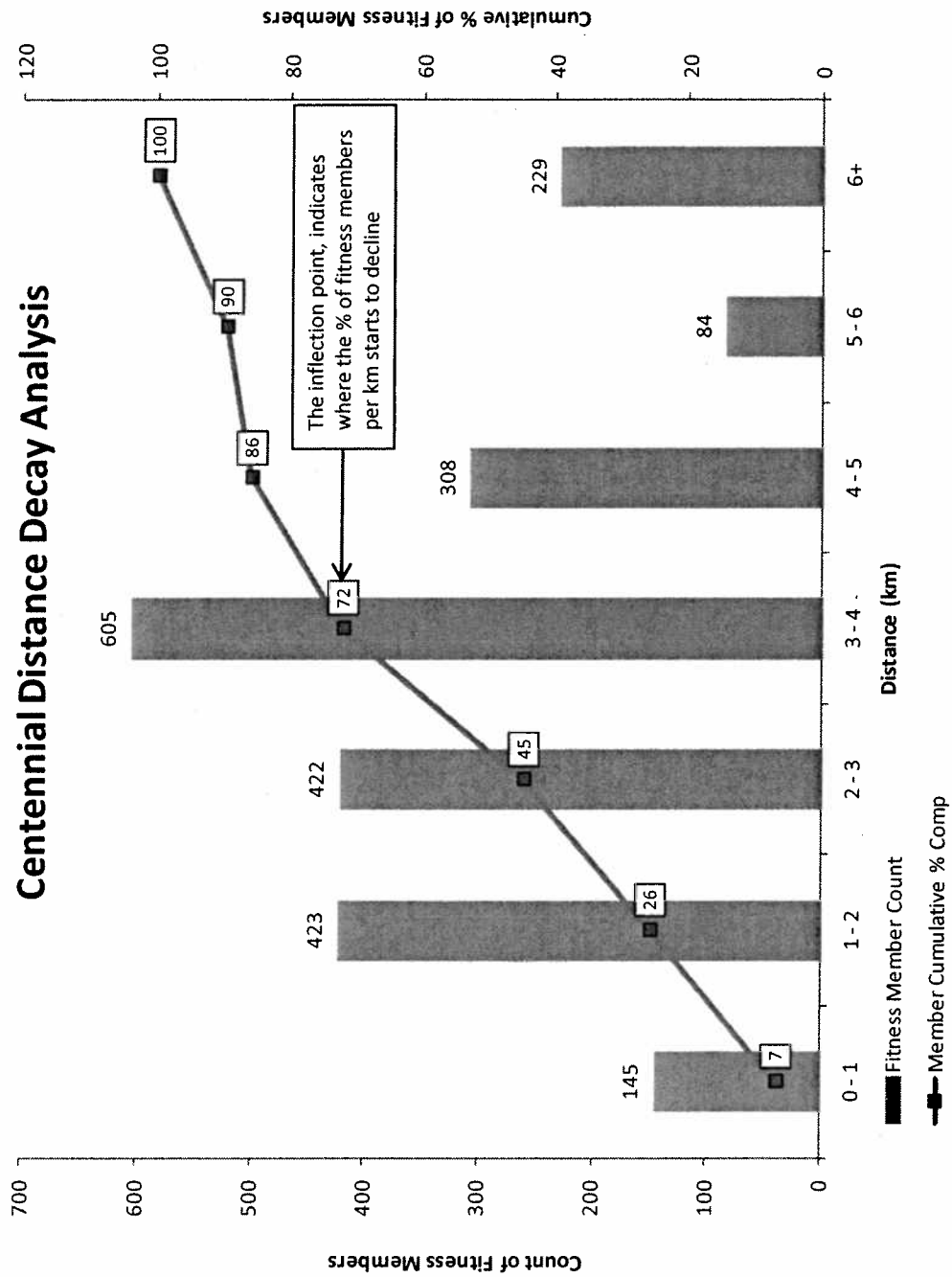
Purpose	To help Markham Parks & Recreation gain insight into the characteristics of the patrons of their fitness centres
Data	2010 Fitness Centre Patrons
Approach	1. Distance Decay Analysis of Fitness Centre Locations 2. PRIZM_{C2} Profiles a) Current Fitness Centre Patrons b) NADbank – Exercise at a Fitness Club 3. Income Analysis on Fitness Centre Trade Areas
Geography	Town of Markham

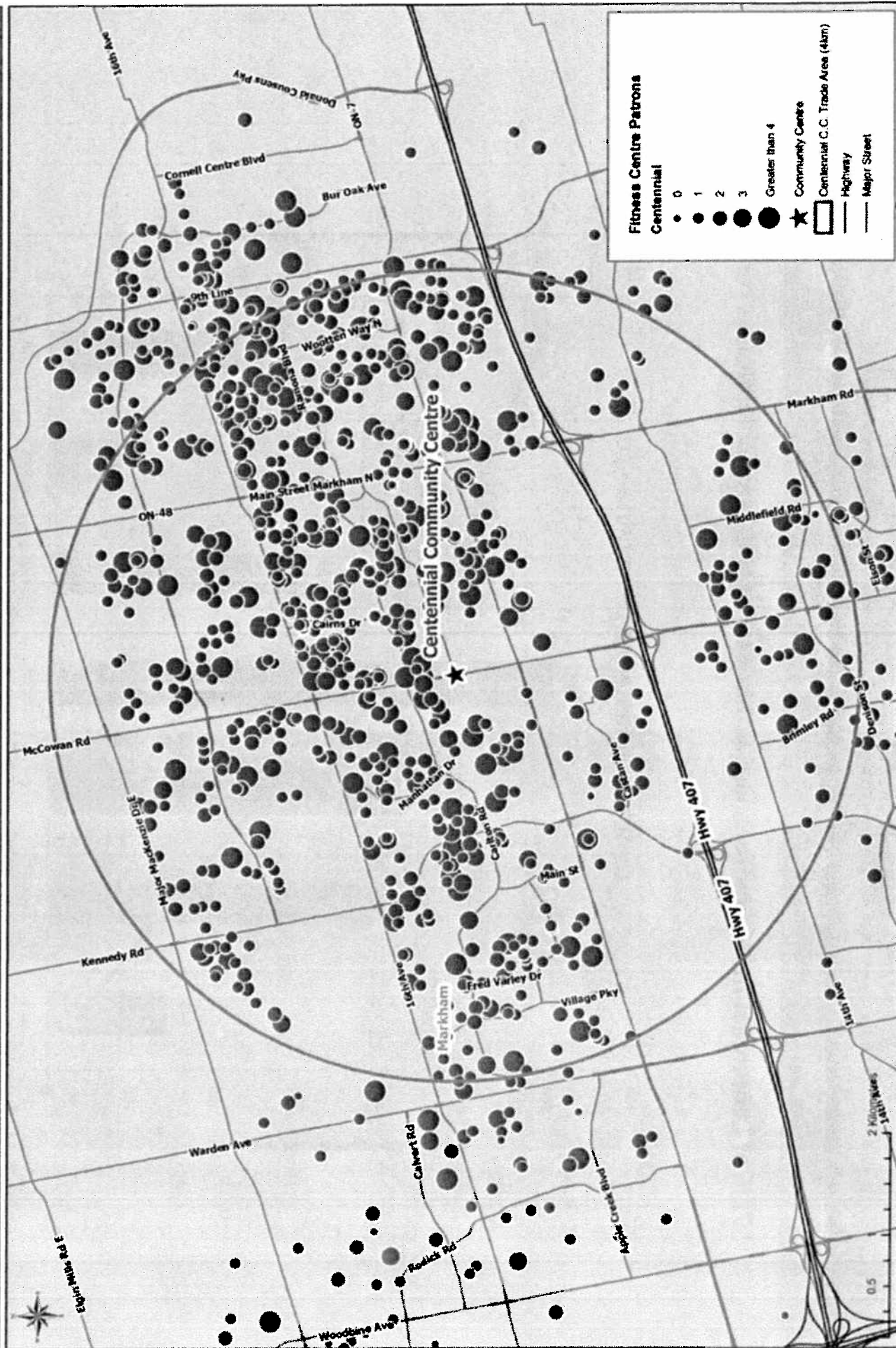
Distance Decay Analysis	1. EA performed a distance decay analysis on the fitness patrons at each fitness centre 2. Based on the results of the distance decay reports, EA created trade areas
PRIZMC2 Profiles	EA ran profiles of the fitness patrons for each centre compared to the identified trade area A PRIZM profile allows you to find like types of neighbourhoods with similar demographics, behaviours and membership patterns
Income Summary	EA created a summary of the neighbourhood average household income of fitness patrons to use as an indicator of whether they would have the financial capacity to withstand an increase in membership fee



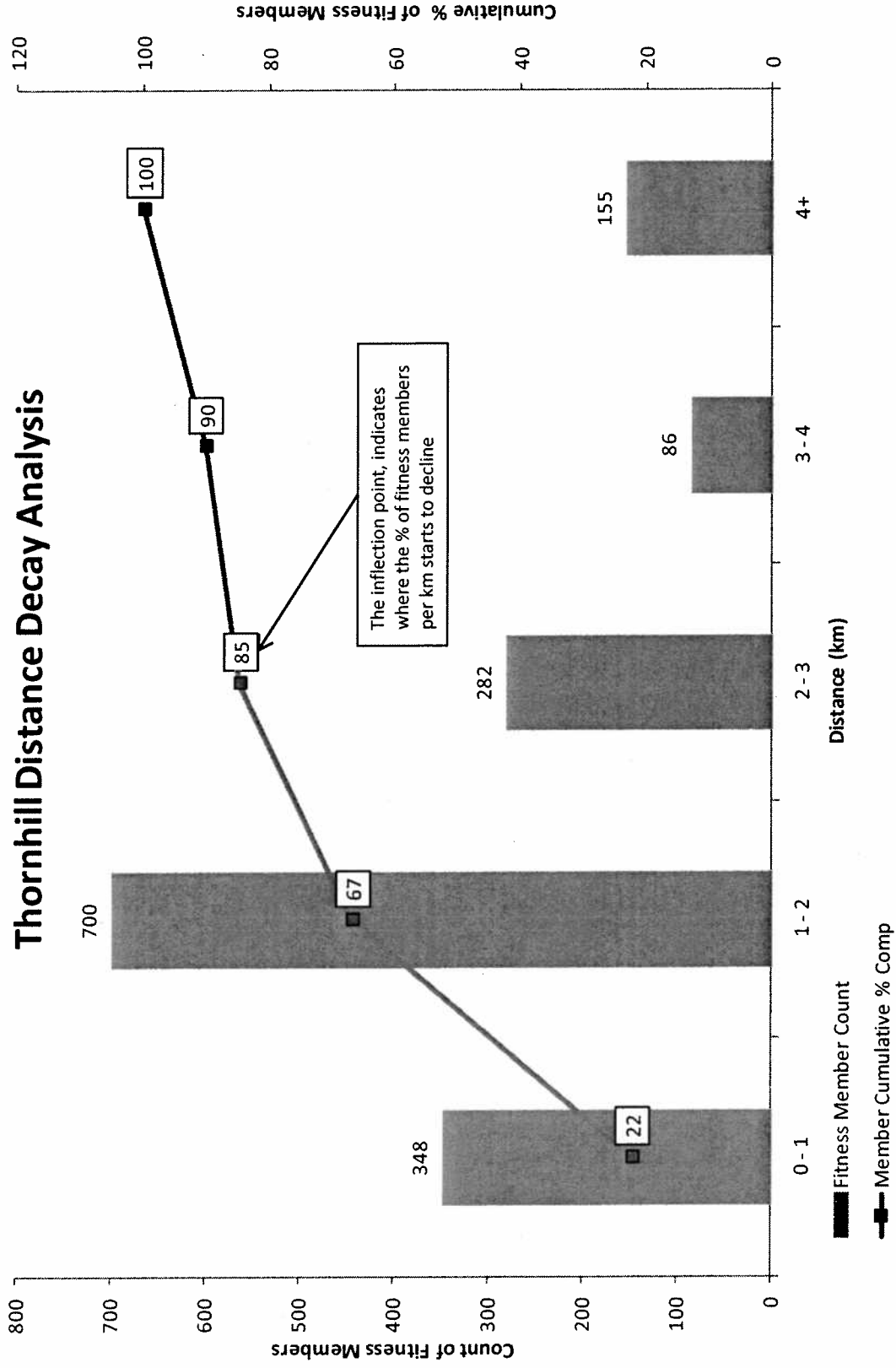
Distance Decay Analysis

72% of Centennial fitness patrons live within 4km of the Centennial fitness centre

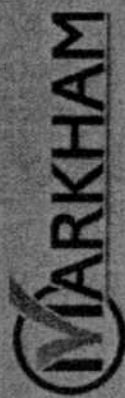
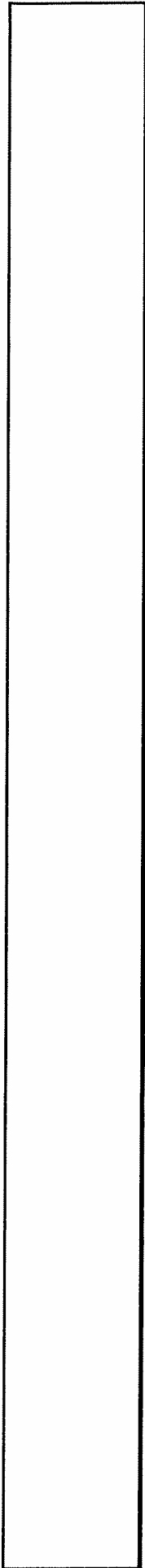




85% of Thornhill fitness patrons live within 3km of the Thornhill fitness centre







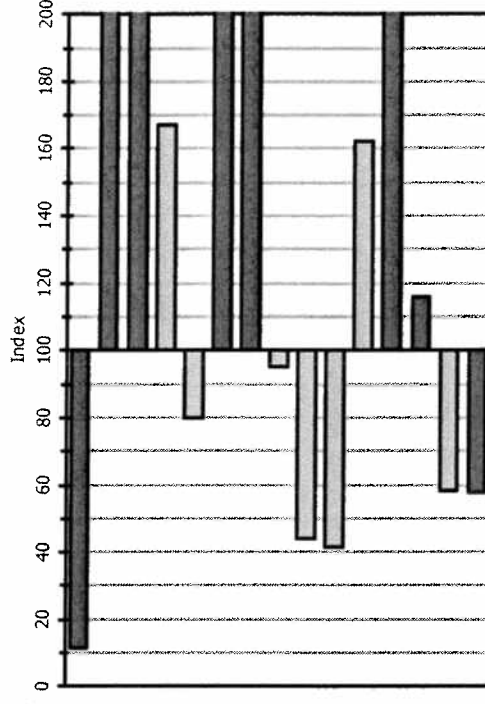
Centennial Patron Analysis

PRIZM² SEGMENTATION

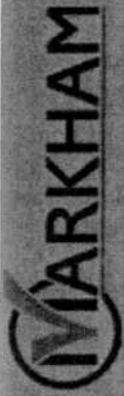
Centennial Fitness Centre Members

Compared to Population 16+
Market: 4km Trade Area

Social Group	SESI	Profile		Profile		Base		Penetration	
		Description	Count	% Comp	Count	% Comp	% Pen	Index	Index
U1	01	Cosmopolitan Elite	3	0.19	1,885	1.62	0.16	12	
U1	02	Urbane Villagers	70	4.39	2,464	2.12	2.84	207	
U1	08	Money & Brains	70	4.39	1,967	1.69	3.56	259	
S1	03	Suburban Gentry	104	6.52	4,535	3.90	2.29	167	
S1	11	Pets & PCs	181	11.35	16,494	14.20	1.10	80	
E1	07	Winner's Circle	417	26.14	13,202	11.37	3.16	230	
E1	12	God's Country	54	3.39	1,631	1.40	3.31	241	
S2	05	Asian Affluence	356	22.32	27,232	23.45	1.31	95	
S2	20	Asian Up-and-Comers	133	8.34	22,008	18.95	0.60	44	
S2	21	South Asian Society	103	6.46	18,026	15.52	0.57	42	
S2	29	Suburban Rows	38	2.38	1,707	1.47	2.23	162	
E2	22	Blue-Collar Comfort	16	1.00	396	0.34	4.04	294	
U3	18	Cluttered Nests	27	1.69	1,694	1.46	1.59	116	
S4	38	Grey Pride	17	1.07	2,128	1.83	0.80	58	
U7	62	Park Bench Seniors	6	0.38	757	0.65	0.79	58	
Total			1,595	100.00	116,125	100.00	1.37	100	



Markham is very diverse area, however Centennial fitness patrons are more likely to come from upscale, non-ethnic neighbourhood types, which are less likely to have small children at home



Strong Fitness Patrons

Strong for Centennial

50% of Fitness Patrons

24% of Pop 16+ in the Trade Area

3% Penetration Rate

Index= 210

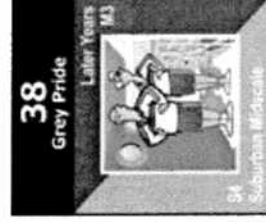
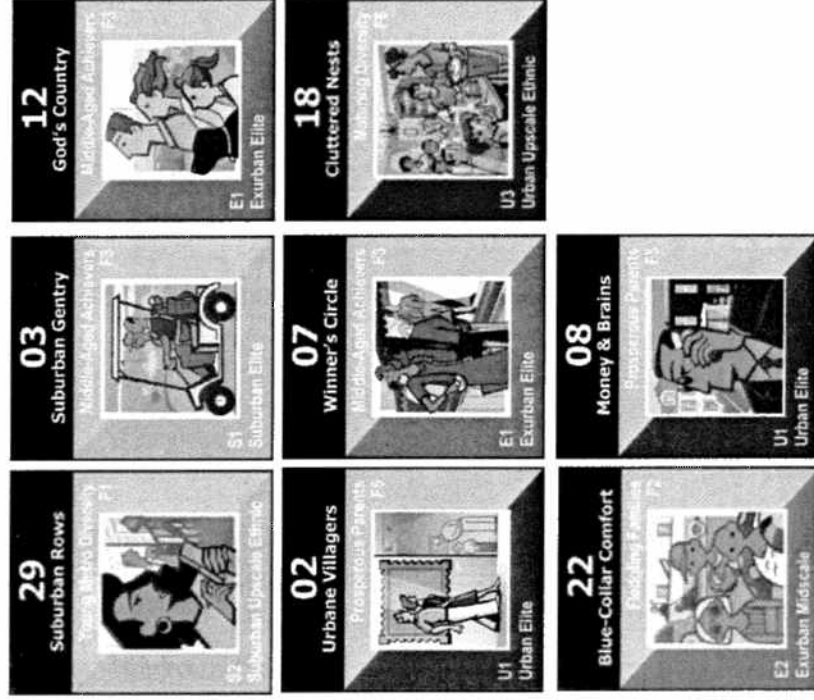
Strong for NADbank – Exercise at a Health Club Once a Week

27% of Profile Respondents

22% of Pop 18+ in the Town of Markham

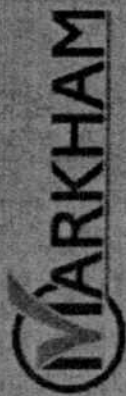
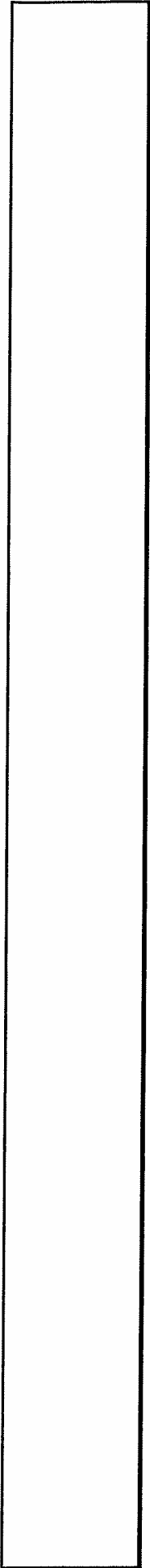
7% Penetration Rate

Index=119



Source: 2011 PRIZM_{CD}; NADBank1470: 1+ Times Participates per week = Exercise at a Health/Fitness Club % of target pop 18+; Index>115;% Comp>.5%

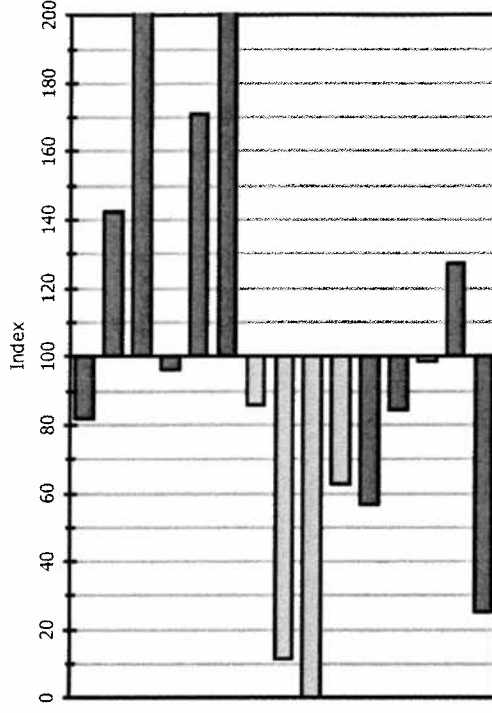




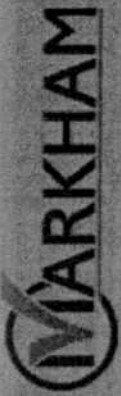
Thornhill Patron Analysis

Thornhill Fitness Centre Patrons within 3km of Thornhill Fitness Centre Compared to Population 16+ Ranked by Social Group

Social Group	SESI	Profile		Base		Penetration	
		Description	Count	% Comp	Count	% Comp	Index
U1	01	Cosmopolitan Elite	47	3.53	2,959	4.31	1.59
U1	02	Urbane Villagers	207	15.56	7,519	10.94	2.75
U1	08	Money & Brains	214	16.09	5,410	7.87	3.96
U1	09	Furs & Philanthropy	210	15.79	11,276	16.40	1.86
S1	03	Suburban Gentry	43	3.23	1,299	1.89	3.31
E1	07	Winner's Circle	58	4.36	619	0.90	9.37
S2	05	Asian Affluence	296	22.26	17,784	25.87	1.66
S2	20	Asian Up-and-Comers	6	0.45	2,676	3.89	0.22
S2	21	South Asian Society	0	0.00	320	0.47	0.00
S2	29	Suburban Rows	138	10.38	11,407	16.59	1.21
U3	18	Cluttered Nests	18	1.35	1,644	2.39	1.09
U3	37	Old World Style	8	0.60	490	0.71	1.63
S4	38	Grey Pride	48	3.61	2,520	3.67	1.90
U4	28	Startups & Seniors	29	2.18	1,179	1.71	2.46
U5	46	Newcomers Rising	8	0.60	1,639	2.38	0.49
Total			1,330	100.00	68,741	100.00	1.93



Thornhill fitness patrons are very similar to Centennial fitness patrons ; older, affluent, non-ethnic neighbourhood types, which are less likely to have small children at home



Strong Fitness Patrons

Strong for Thornhill

41% of Fitness Patrons

23% of Pop 16+ in the Trade Area

3% Penetration Rate

Index= 178

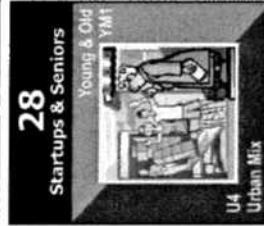
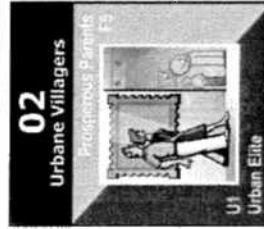
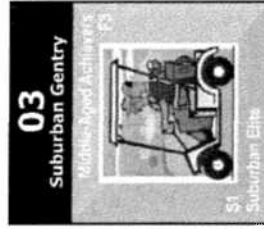
Strong for NADbank – Exercise at a Health Club Once a Week

27% of Profile Respondents

22% of Pop 18+ in the Town of Markham

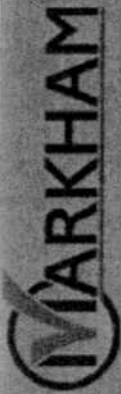
7% Penetration Rate

Index=119



Source: 2011 PRIZM_{CD}; NADBank1470: 1+ Times Participates per week = Exercise at a Health/Fitness Club % of target pop 18+; Index>115;% Comp>.5%





Fitness Patron Comparison

PRIZM _{C2} Code	PRIZM _{C2} Name	Centennial	Thornhill	NADbank
01	Cosmopolitan Elite	INS	82	161
02	Urbane Villagers	207	142	92
08	Money & Brains	259	204	72
09	Furs & Philanthropy	N/A	96	14
03	Suburban Gentry	167	171	119
11	Pets & PCs	80	N/A	104
07	Winner's Circle	230	484	60
12	God's Country	241	N/A	82
05	Asian Affluence	95	86	100
20	Asian Up-and-Comers	44	INS	120
21	South Asian Society	42	N/A	94
29	Suburban Rows	162	63	100
22	Blue-Collar Comfort	LC	N/A	LC
18	Cluttered Nests	116	LC	64
37	Old World Style	N/A	INS	LC
38	Grey Pride	LC	98	116
28	Startups & Seniors	N/A	217	73
46	Newcomers Rising	N/A	INS	107
62	Park Bench Seniors	INS	N/A	64

% of All Fitness Patrons 42% 37%

Cluster 07 Winner's Circle, 03 Suburban Gentry, 02 Urbane Villagers, and 08 Money & Brains have a strong propensity to be fitness members in either trade area

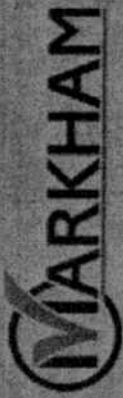
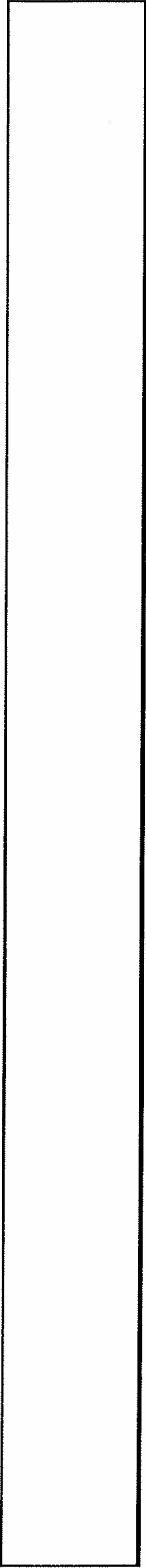
Cluster 12 God's Country has a strong presence within the Centennial fitness centre trade area

Cluster 01 Cosmopolitan Elite, 20 Asian Up-And-Comers and 38 Grey Pride, show strength in the NADbank fitness profile

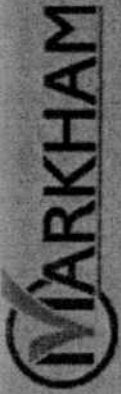
Source: 2011 PRIZM_{C2}; NADBank1470: 1+ Times Participates per week = Exercise at a Health/Fitness Club % of target pop 18+;

LC (Low Count) = Less than 20 Patron; INS (Insufficient Count) = Less than 10; N/A = Not available

Above Average	Average	Below Average
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Income Summary



Income Summary

EA created a primary and secondary trade area to further understand the income distribution of Markham Parks & Recreation fitness patrons

Trade Area	Total										≤ \$45K										\$45K to \$75K										\$75K to \$98K										\$98K to \$130K										\$130K+																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																
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Total Markham Fitness Patrons	3,955	100.0	22,723	100.00	17.4		8	0.2	426	2.8	1.3		72	1.8	5,791	25.8	1.2		7	613	15.5	6,320	27.8	2.7		1,286	32.5	6,768	29.8	19.0	107		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3,218	14.2	14.2		1,290	32.6	3

Above Average

- 33% of all fitness patrons come from a neighbourhood which has an average household income of \$130K0 or greater
- 49% of all Thornhill fitness patrons within the 5km radius have an average household income of \$130K+
 - 33% of all Centennial fitness patrons within the 6km radius have an average household income of \$130K+

Average

33% of fitness patrons come from a neighbourhood whose average households income reflects the Town of Markham average

- 30% of Thornhill fitness patrons within the 5km radius have an average household income
- 45% of Centennial fitness patrons within the 6km radius have an average household income

Below

Households
54% @\$98K or less

Fitness Patrons
20%

46% @\$98K or greater

80%

