

Downtown Gananoque Trade Area Report



September 2007



Foreword

This report was prepared by the Ontario Ministry of Agriculture, Food and Rural Affairs for the benefit of the Gananoque Downtown Revitalization Management Committee. Any further dissemination of the report is at the discretion of the Gananoque Downtown Revitalization Management Committee.

Downtown Market Analysis provides communities with information about local market conditions and opportunities so they can develop effective strategies for Downtown Revitalization. The trade area analysis is an important component as it assists in determining the size and demographic characteristics of downtown consumers.

Trade area boundaries used in the report were derived from locally collected survey data and as such the Ministry makes no warranty as to the reliability and accuracy of the information. The demographic data provided here is based primarily on 2001 Statistics Canada Census data and may not reflect more current trends in the area.

The population projections and expenditure estimates reflect a third party methodology (MapInfo Canada). They incorporate explicit economic assumptions about spending behaviour. This methodology is described in Appendix A. None of the projections or estimates represents the Government of Ontario policy targets, or desired population outcomes.

Readers are cautioned that the secondary data compiled here only provides one perspective on the community's economy. It is provided with the understanding that the local project team is reviewing this information in the context of other important inputs such as knowledge about the local community from other sources including: business inventories, municipal studies, results of community surveys and discussions with other community members.

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1.0 Introduction – Analyzing Your Trade Area

The customer origin survey and trade area analysis provide communities with information about the size and composition of the local market. The customer origin survey is used to collect information to determine where downtown shoppers live. The trade area analysis then identifies demographic characteristics of potential downtown consumers, which can be used to:

1. Identify who is shopping in your downtown, where they are from, and their buying habits.
2. Assist you with marketing and promotion efforts by determining potential target markets such as seniors, young families or specific geographic areas.
3. Aid economic development efforts by identifying new business opportunities and supporting the expansion of existing businesses in the downtown.

1.1 The Importance of Determining Your Trade Area

The term “trade area” refers to a geographic area in which the majority of customers for the downtown reside (60-80%). Simply put, trade areas are how far people are willing to travel to purchase specific goods and services in the downtown. Once the size of the trade area is determined, you can estimate the number of potential customers that may patronize your downtown. Knowing the trade area also allows the demographic characteristics of the potential customers to be analyzed which provides greater insights into the people who live in the trade area, and enables you to assess consumer demand for local products and services.

1.2 Different Types of Trade Areas

This trade area analysis is based on the downtown as a whole, and provides a generalized trade area for businesses in the downtown. However, it is important to note that different types of retail and service businesses have different trade areas depending on the type and quality of products sold, particular customer preferences and business activity. While every store has its own unique trade area, they can be classified into three different types:

- **Convenience-shopping** businesses offer frequently purchased goods and services like gasoline or groceries. People will typically base their decision about where to buy convenience items on the shortest travel time and distance. For this reason, the size of the trade area for convenience shopping tends to be small.
- **Comparison-shopping** businesses offer goods and services that are purchased frequently, but not as impulsively as with convenience shopping. People will base their decision to buy comparison goods and services on style, brands and prices. Trade areas for comparison shopping will vary in size depending on regional competition.
- **Destination-shopping** businesses offer “big-ticket” items like furniture or automobiles, which are purchased infrequently. These are more expensive and require greater forethought with respect to the merchandise, its appearance, quality, price, and style. Consumers are willing to travel longer distances for big ticket purchases, so these trade areas tend to be larger.

Another factor that affects the size of the trade area is the type of customers that frequent the downtown, including local residents, downtown employees and visitors/tourists:

- Local residents usually represent the majority of spending potential for downtown businesses.
- Downtown employees may live within the trade area of downtown businesses, but may also commute from outside of the area. These employees are potential customers for local businesses.
- Tourists also represent potential consumers of downtown products and services.

Trade area analysis provides detailed information on the local resident market. However, it provides limited information about downtown employees and tourist markets. Other data collection methods such as surveys and focus groups should be used to gather detailed information on these markets if required.

2.0 Defining Downtown Gananoque's Trade Area

Downtown Gananoque trade area is the geographic area in which the majority of current and potential customers for Gananoque's downtown retail and service businesses reside.

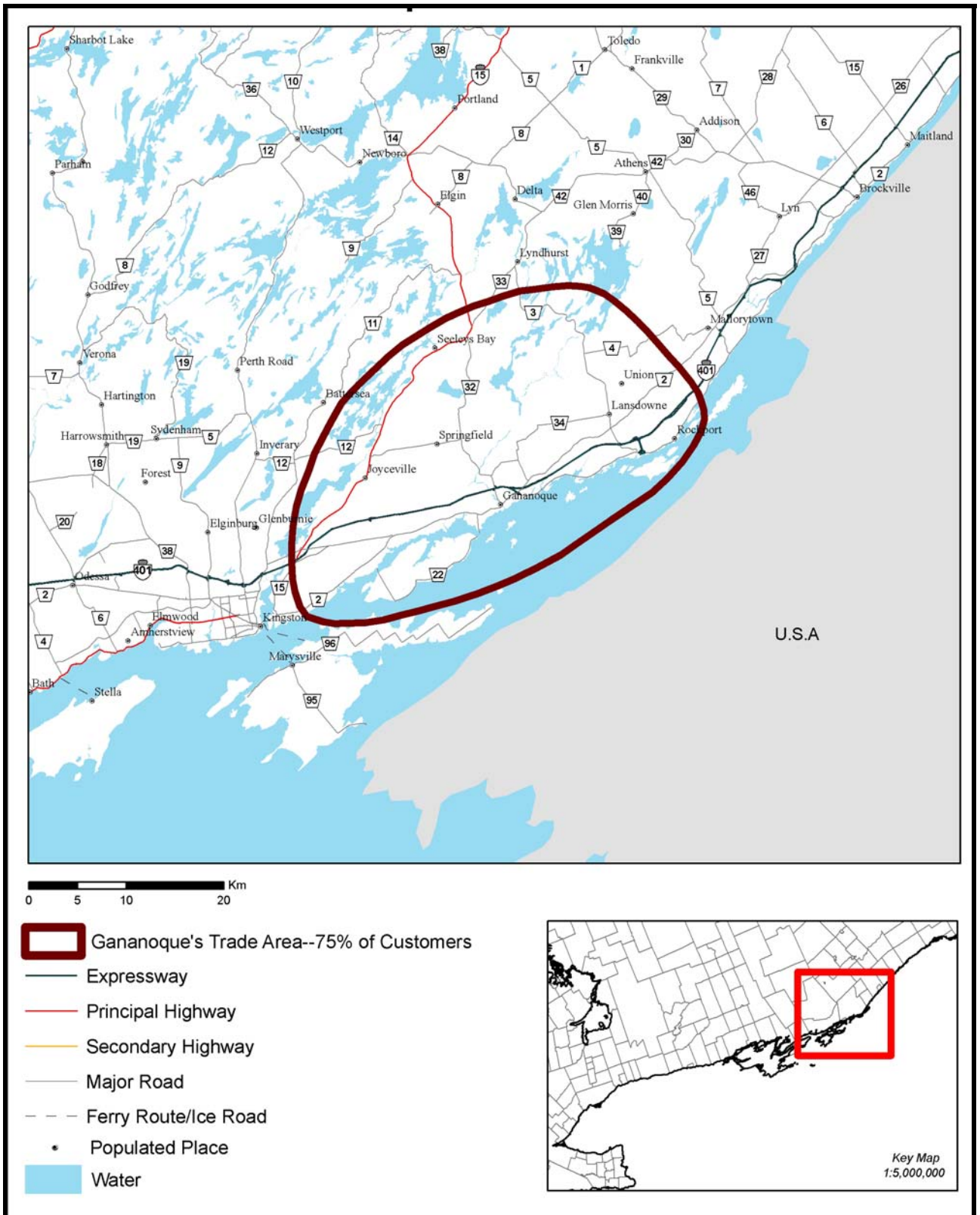
A customer origin survey was conducted at 9 businesses in Gananoque, during May 7, where customers were asked to provide their postal code and community name. There were 80 responses collected which were then analyzed using Geographic Information Systems (GIS)¹. This method provides an estimate of the downtown trade area.

2.1 Size and Shape of Downtown Gananoque's Trade Area

The trade area for downtown Gananoque was established by using the closest 75% of customers. The boundary of Downtown Gananoque's trade area is presented in the following map (see Figure 1). The map indicates that 75% of downtown customers live less than 10km of downtown Gananoque, with the trade area stretching out to the east to encompass the communities of Erinsville, Marlbank, and Ingle. This does not mean that people from outside this boundary do not shop in Gananoque's downtown but simply that the majority of the customers are likely drawn from this area.

¹ A description of GIS is available in the Glossary

Figure 1. Downtown Gananoque's Trade Area



3.0 Demographic Characteristics of Downtown Gananoque's Trade Area

This section provides key demographic data for the downtown trade area. The data highlights the market size as well as the demographic characteristics of the people within the trade area.

Downtown Gananoque's trade area is compared with the Town of Gananoque, and Rural Southern Ontario² demographics to allow baseline comparisons to be established. These baselines will assist in determining whether the trade area is different in a particular demographic category.

Demographic Characteristics Executive Summary

Executive Summary	Downtown Gananoque's Trade Area		Separated Town of Gananoque		Rural Southern Ontario	
Resident Population						
2001 Census	20,525		5,165		4,081,524	
2006 Population	22,137		5,285		4,434,684	
2005 to 2008 Estimated population change	2.30%		1.00%		3.70%	
2005 Daytime Population	20,704		7,836		4,124,632	
Households						
2005 Household estimate	8,521		2,375		1,672,154	
Average number of persons per households	2.6		2.2		2.7	
Age						
Average age	40.6		42.7		37.8	
Senior Citizens (65 and over)	3,284		1,140		558,073	
Income \$						
2005 estimated average household income	\$74,340		\$55,905		\$71,981	
Family Structure						
Married & Common-law couples	7,681		2,205		1,482,010	
	5,531	72%	1,235	56%	1,020,531	69%
Living alone	1,529	20%	715	32%	314,669	21%
Lone-parent families	621	8%	255	12%	146,810	10%
Number of children per family	1		0.9		1.2	
2001 Total Occupied private dwellings	7,778		2,260		1,496,610	
Owned	6,611	85%	1,585	70%	1,159,574	77%
Rented	1,166	15%	680	30%	334,577	22%
Housing Type						
Single-detached house	7,725		2,270		1,489,167	
	6,575	85%	1,310	58%	1,137,930	76%
Semi-detached house	271	4%	185	8%	60,077	4%
Row house	132	2%	125	6%	72,451	5%
Apartment	747	10%	650	29%	218,709	15%
Average value of dwellings	\$166,269		\$129,777		\$170,052	
Mobility (1996-2001)						
Non-movers (same address five years ago)	12,472		2,950		2,290,633	
Moved within the community	2,822		870		698,829	
Moved from another area of Ontario	2,699		765		665,320	
Moved from another Province	607		165		78,282	
Moved from another Country	201		20		50,227	
Employment						
In the labour force	10,438		2,555		2,163,530	
Not in the labour force	5,707		1,600		1,018,963	
Unemployment rate	5.30%		6.70%		5.30%	
Occupations						
White Collar	10,340		2,515		2,138,997	
	3,728	36%	865	34%	710,728	33%
Service Sector	3,580	35%	945	38%	769,037	36%
Blue Collar	2,953	29%	635	25%	658,043	31%

² For a definition of the area considered as Rural Southern Ontario refer to Appendix 4.

3.1 General Population Characteristics of Gananoque

3.1.1 Population

The population size is important for measuring the current market and consumer demand. Population is defined as all persons living within the downtown trade area boundary. The population of downtown Gananoque's trade area in 2006 was 22,137 people, which increased in population by 7% from 2001.

Table 1. Current Population

2006 Census Population and Dwelling Counts	Downtown Gananoque's Trade Area	Separated Town of Gananoque	Rural Southern Ontario
2006 Population	22,137	5,285	4,434,684
2001 Population*	20,525	5,165	4,081,524
2001-2006 Population Change*			
Persons	1,612	120	353,160
Percent	7%	2%	8%

Source: Statistics Canada, 2001 and 2006.

3.1.2 Population Projections

Anticipated population growth may indicate future opportunities for business expansion and/or recruitment.

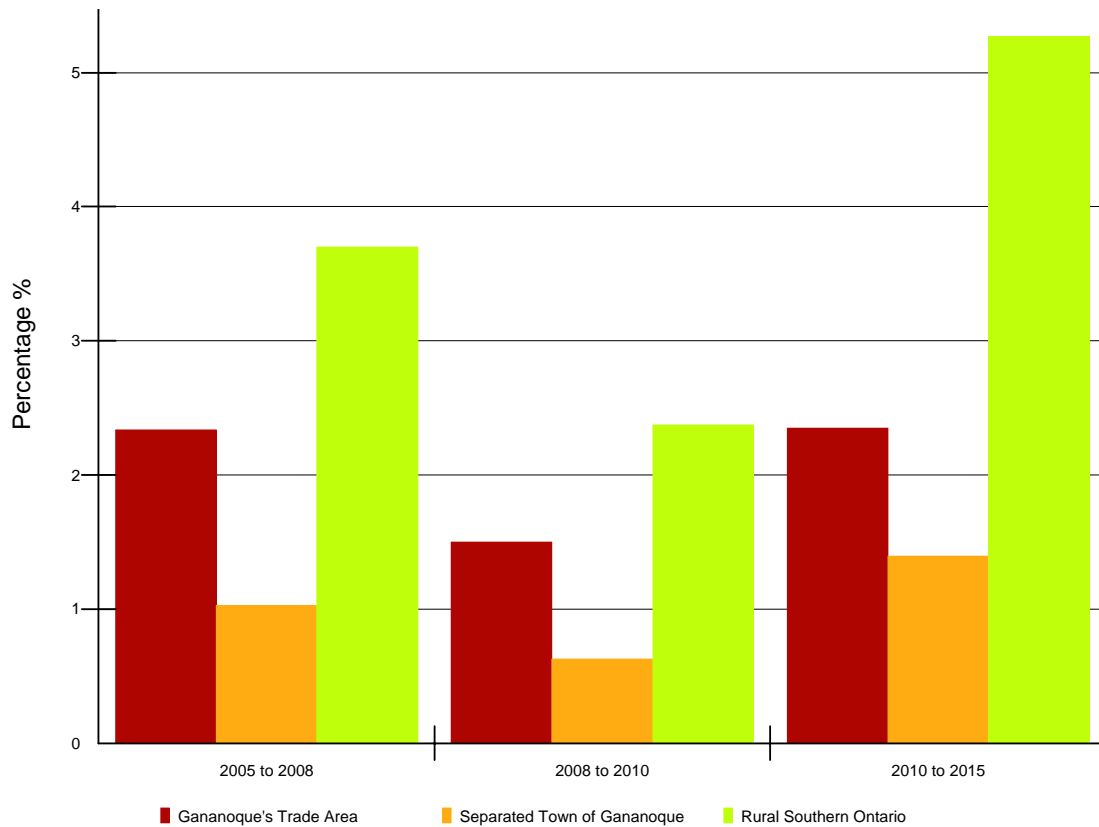
While the population of downtown Gananoque's trade area grew from 2001 to 2006, Table 2 and Graph 1 show that over the next decade, population is projected to continue to grow by 6%. This growth is projected to be higher than the Town of Gananoque (3%) but is less than Rural Southern Ontario (11%). Because of the growth in population, it is likely that consumer spending potential in downtown Gananoque's trade area will likely increase over the next decade.

Table 2. Population Projections

Population Projections	Downtown Gananoque's Trade Area	Separated Town of Gananoque	Rural Southern Ontario
Population Projections			
2008 projected	23,179	5,412	4,680,529
2010 projected	23,527	5,446	4,791,641
2015 projected	24,080	5,522	5,044,131
Change in Population (percent)			
2005 to 2015	6%	3%	11%

*This Population estimate has been generated by MapInfo Canada, 2005

Graph 1. Estimated and Projected Rate of Population Change 2005 to 2015



Source: MapInfo Canada, 2005.

3.1.3 Daytime Population

“Daytime population” is an estimate of people who either work in the trade area during the day, or are at home during the day, such as stay-at-home parents and retirees. The daytime population is important in identifying different retail opportunities. For instance, having a high daytime population creates a greater potential demand for restaurants, bars, financial institutions, dry cleaners, florists, coffee shops, business supply stores, retailers and specialty stores catering to a daytime shopper.

Table 3 shows that within Gananoque’s downtown trade area the 2005 estimated daytime population is 20,704 people. 48% of the daytime population is employees for the Gananoque downtown trade area, which is lower percentage than both the Town (65%) and Rural Southern Ontario (51%).

Table 3. Daytime Population

Daytime Population	Downtown Gananoque’s Trade Area		Separated Town of Gananoque		Rural Southern Ontario	
		%		%		%
2005 Total Daytime Population	20,704		7,836		4,124,632	
2005 Daytime Employees	9,970	48%	5,099	65%	2,109,505	51%
2005 Daytime Population at home	10,734	52%	2,737	35%	2,015,127	49%
Age 0 to 14 years	3,571	17%	843	11%	836,391	20%
Age 15 to 64 years	3,778	18%	819	10%	609,629	15%
Age 65 plus years	3,386	16%	1,075	14%	569,107	14%

*This Daytime Population estimate has been generated by MapInfo Canada, 2005

3.1.4 Households

Along with population and daytime population, the number of households is another method for quantifying the current market size and growth, both of which are vital in determining consumer demand. Households consist of one or more persons who live together in the same housing unit (including all occupied housing units), regardless of their relationship to each other. Anticipated growth in the number of households may indicate an increase in future demand for goods and services, as well as opportunities for business expansion and/or recruitment.

In 2005, the number of households in Gananoque's downtown trade area was estimated to be 8,087. The number of households within Gananoque's downtown trade area is projected to grow at a faster rate than the population. This growth over the next decade at 8% is higher than the growth projected for the Town of Gananoque (4%), and lower than Rural Southern Ontario rate of 15%.

Table 4. Households

Households	Downtown Gananoque's Trade Area		Separated Town of Gananoque		Rural Southern Ontario	
		%		%		%
Total Households						
2001 Households	8,087		2,348		1,558,111	
2005 Household estimate	8,521		2,375		1,672,154	
2008 Household projection	8,802		2,408		1,760,140	
2010 Household projection	8,993		2,433		1,818,872	
2015 Household projection	9,304		2,478		1,959,351	
Change in Households (percent)						
2001 to 2005	5.40%		1.10%		7.30%	
2005 to 2008	3.30%		1.40%		5.30%	
2008 to 2010	2.20%		1.00%		3.30%	
2010 to 2015	3.30%		1.80%		7.20%	

* Household estimates and projections have been generated by MapInfo
Source: Statistics Canada, 2001 and MapInfo Canada, 2005.

3.1.5 Age

Age is an important demographic factor because the type and level of personal expenditures change as individuals age. Therefore, the number and proportion of people in the trade area from different age groups will determine the viability and potential for certain business types and store merchandise (see Figure 1).

Figure 1. Consumer Products or Services Purchased Disproportionately by Particular Age Groups

Age Group	Product or service
Under 25	Transportation, apparel, entertainment, personal care, food away from home, education
25 to 34	Home ownership, household appliances, do-it-yourself products, housing costs, entertainment, apparel, transportation
35 to 49	Apparel, housing costs, home ownership, entertainment, transportation
50 to 64	Travel, recreational products and services, personal insurance, household furnishing
65 to 79	Health, travel, home services, housing repairs, food at home, public transportation
80 and over	Health, home services, housing repairs, food at home

Source: U.S. Bureau of Labor Statistics, Consumer Expenditures in 1995, 1997; based on Consumer Expenditure Survey data

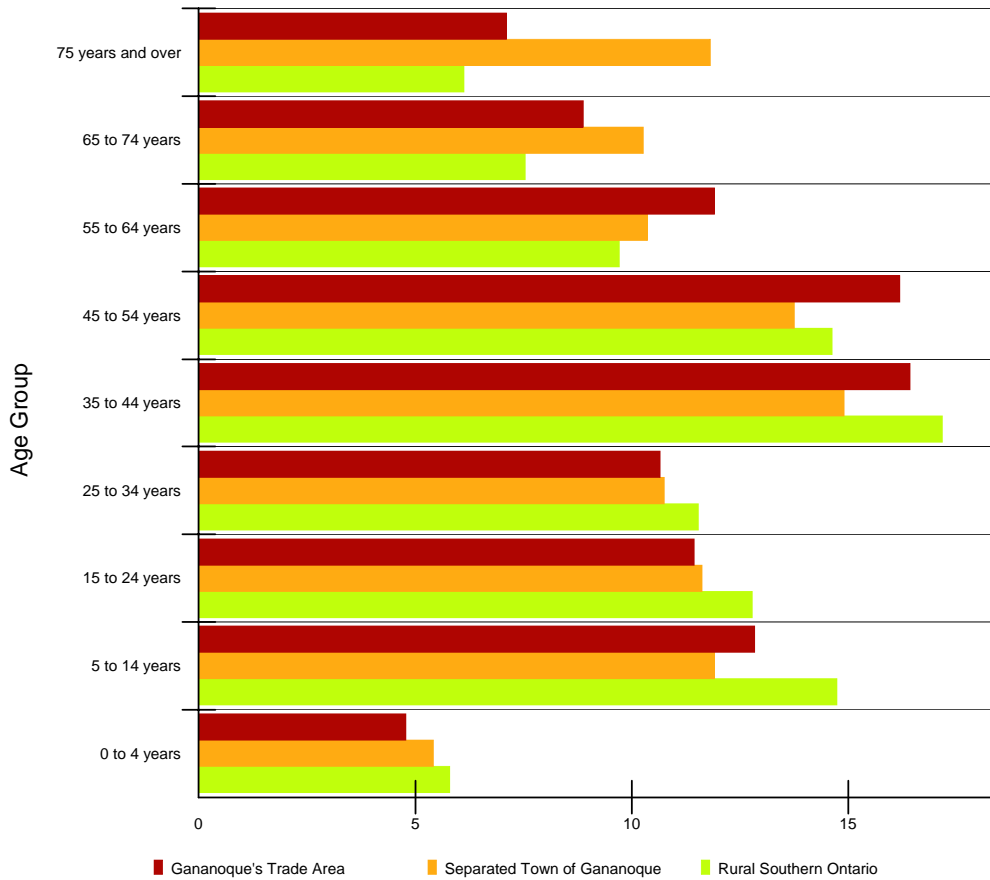
Table 5 and Graph 2 describe the age distribution in downtown Gananoque's trade area. In general, the average age of downtown Gananoque's trade area is consistent with both Town of Gananoque and Rural Southern Ontario. However, seniors in the downtown trade area make up 16% of the population compared to 22% in Town of Gananoque and 14% in the Rural Southern Ontario.

Table 5. Age Distribution

Age	Downtown Gananoque's Trade Area		Separated Town of Gananoque		Rural Southern Ontario	
		%		%		%
2001 Total Population	20,525		5,165		4,081,524	
Age						
0 to 4 years	982	5%	280	5%	236,781	6%
5 to 14 years	2,636	13%	615	12%	601,230	15%
15 to 24 years	2,347	11%	600	12%	521,931	13%
25 to 34 years	2,186	11%	555	11%	471,061	12%
35 to 44 years	3,372	16%	770	15%	700,661	17%
45 to 54 years	3,324	16%	710	14%	596,941	15%
55 to 64 years	2,446	12%	535	10%	396,411	10%
65 to 74 years	1,824	9%	530	10%	307,768	8%
75 years and over	1,460	7%	610	12%	250,305	6%
Average age	40.6		42.7		37.8	
Median age	41.4		42.2		38	
Dominant age group	35 to 44 years	16%	35 to 44 years	15%	35 to 44 years	17%
Senior Citizens (65 and over)	3,284	16%	1,140	22%	558,073	14%

Source: Statistics Canada, 2001.

Graph 2. Age Distribution



Source: Statistics Canada, 2001.

3.1.6 Income Distribution

Household income is a good indicator of the spending power of residents and has a positive correlation with retail expenditures in many product categories. Using income as the sole measure of a market's taste preference can be deceptive and should be considered in the context of other demographic characteristics contained in this report.

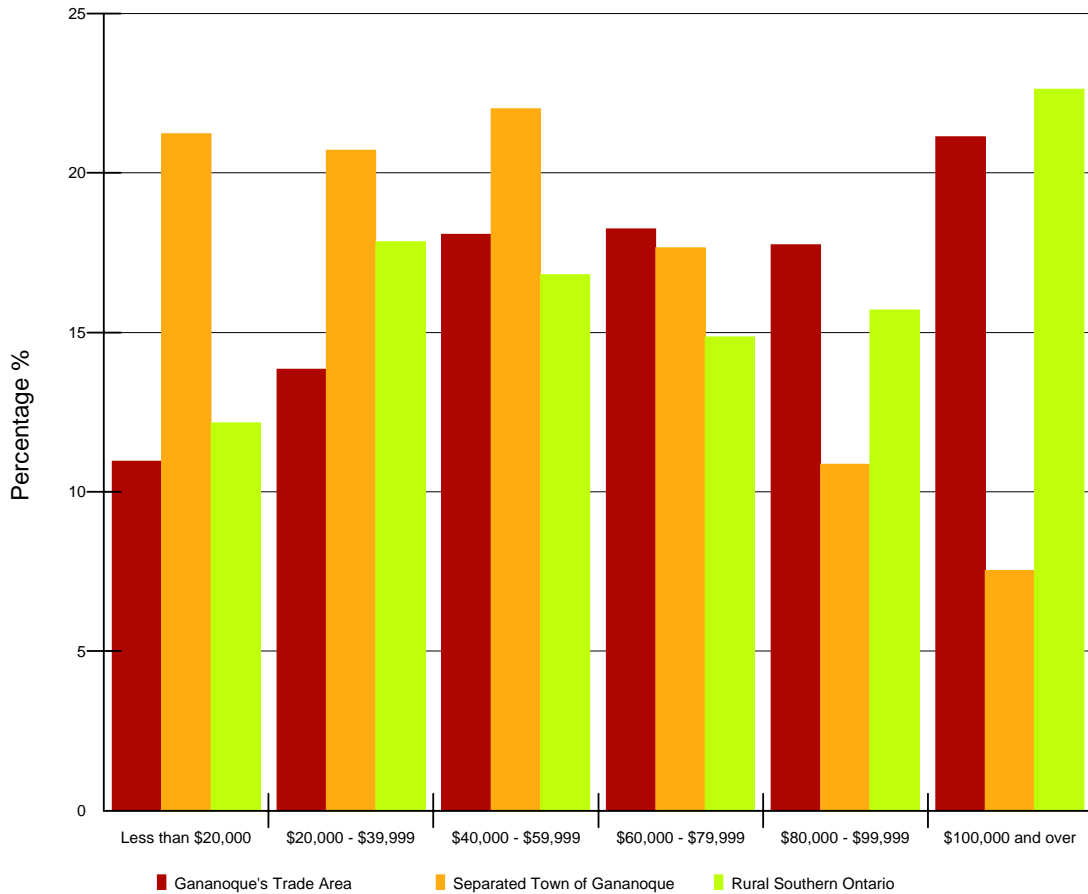
Table 6, show that Gananoque's downtown trade area has a higher average per capita income (\$32,758) than the Town of Gananoque and Rural Southern Ontario. Graph 3 highlights that 39% of households in the downtown Gananoque's trade area have incomes over \$80,000, which is greater than the Town of Gananoque (19%) and equal to the Rural Southern Ontario rate (39%). Gananoque's downtown trade area has only 11% of its households falling under the \$20,000 income group compared to 21% for Town of Gananoque and 12% for Ontario. Government transfer payments as a percentage of income in the downtown trade area represented 11.6%, which is lower than the Town at 16.6%, but higher than the Rural Southern Ontario rate at 10.9%. The higher rate of government transfer payments for the Town of Gananoque may be due to the high percentage of seniors in the municipality.

Table 6. Income

Income	Downtown Gananoque's Trade Area		Separated Town of Gananoque		Rural Southern Ontario	
		%		%		%
2001 Per Capita Income \$						
Average Income	\$32,758		\$27,395		\$31,550	
Median Income	\$25,347		\$22,766		\$24,785	
Average Household Income \$						
2001 Income	\$65,814		\$49,163		\$64,133	
2005 Estimated	\$74,340		\$55,905		\$71,981	
2008 Projected	\$81,948		\$61,127		\$80,144	
2010 Projected	\$87,043		\$64,614		\$85,719	
2005 Estimated Households by Income \$						
Less than \$20,000	934	11%	504	21%	203,337	12%
\$20,000 - \$39,999	1,180	14%	492	21%	298,414	18%
\$40,000 - \$59,999	1,540	18%	523	22%	281,219	17%
\$60,000 - \$79,999	1,554	18%	419	18%	248,292	15%
\$80,000 - \$99,999	1,512	18%	258	11%	262,523	16%
\$100,000 and over	1,800	21%	179	8%	378,369	23%
Government transfer payments	11.60%		16.60%		10.90%	

**Income estimates and projections have been generated by MapInfo Canada
Source: Statistics Canada, 2001, and MapInfo Canada, 2005.*

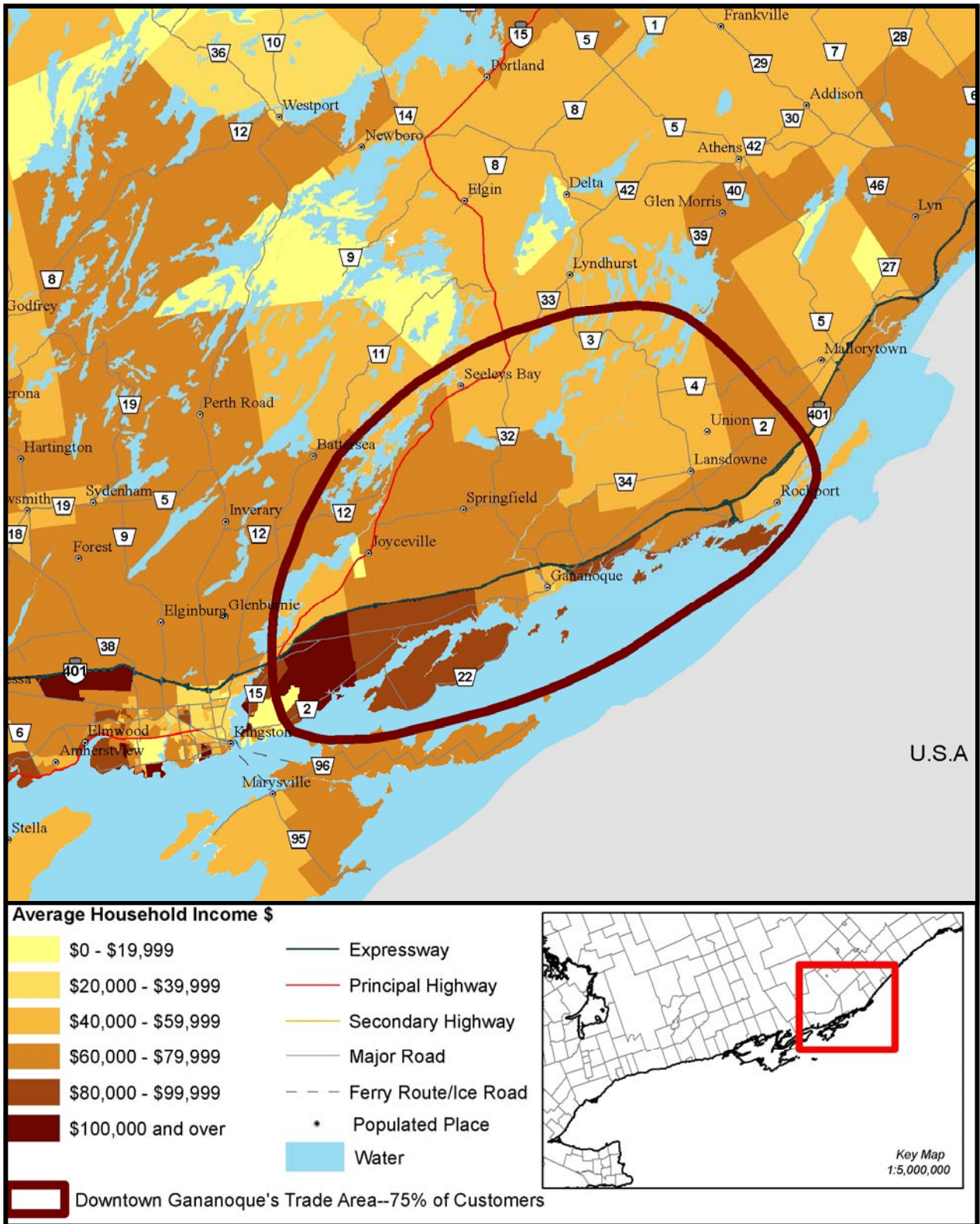
Graph 3. Income Distribution



Source: MapInfo Canada, 2005.

Figure 2 presents a map of the average household income levels in Gananoque and the surrounding area, with the boundary for Gananoque's downtown trade area shown by the circle. As illustrated in the map, areas near to Kingston and south of Highway 401 have higher average household incomes, than the rest of the trade area.

Figure 2. Gananoque's Downtown Trade Area Average Household Income (\$)



3.1.7 Family Structure and Marital Status

Households can be composed of a variety of structures, such as: people living alone, families with or without children, single parent, or a number of unrelated people living together. Family structure is important in identifying different retail opportunities. For instance, households with children generally will spend more money on children's clothes and food while married households without children typically spend more on appliances and home furnishings.

Table 7 shows the family structure for Gananoque's downtown trade area, which has a higher percentage of married & common-law couples (72%), compared to Town of Gananoque (56%) and Rural Southern Ontario (69%). Half of the married & common-law couples have no children at home, which is a higher percentage than both the Town and Rural Southern Ontario.

Table 7. Family Structure

Family Structure	Downtown Gananoque's Trade Area		Separated Town of Gananoque		Rural Southern Ontario	
		%		%		%
Census families in private households by family structure	7,701		2,215		1,481,861	
Living alone	1,529	20%	715	32%	314,669	21%
Married & Common-law couples	5,531	72%	1,235	56%	1,020,531	69%
With no children at home	2,800	36%	650	29%	441,868	30%
With children at home	2,740	36%	595	27%	578,251	39%
Lone-parent families	621	8%	255	12%	146,810	10%
Total children at home by age	6,031		1,405		1,361,050	
Under 6 years of age	1,202	20%	335	24%	290,870	21%
6 - 14 years	2,436	40%	560	40%	541,769	40%
15 - 17 years	797	13%	160	11%	178,083	13%
18 - 24 years	1,172	19%	260	19%	246,158	18%
25 years and over	445	7%	80	6%	103,643	8%
Children/family	1		0.9		1.2	

Source: Statistics Canada, 2001.

3.1.8 Housing Tenure and Dwelling Characteristics

"Housing tenure" refers to the distinction between owner occupied and renter occupied housing units. "Dwelling characteristics" refers to the age and type of housing units. These statistics are valuable in analyzing the potential for a variety of different products and services. For instance, a higher level of home ownership typically translates into higher expenditures for home furnishings and home equipment. Furthermore, dwelling characteristics such as the age of the dwelling, type of dwelling unit, etc. may point to different levels of demand for home improvement products and services, furniture, appliances, hardware, paint/wallpaper, floor covering, and garden centers.

Table 8 shows the Housing Tenure and Dwelling Characteristics for Gananoque's downtown trade area. Gananoque's downtown trade area has a higher percentage (85%) of owner-occupied housing when compared to the Town (70%) and Rural Southern Ontario (77%). The dominant period of construction of dwellings in Gananoque's downtown trade area was before 1946 which is consistent with the Town and Rural Southern Ontario. In terms of newer houses, built since 1996, the downtown trade area has a slightly higher percentage (7%) than the Town (4%), and lower than Rural Southern Ontario rate (8%). As well, the downtown trade area has a larger percentage of single detached housing (85%) when compared with the Town and Rural Southern Ontario (58% and 76%). The average value of dwellings in 2000, for the Gananoque's downtown trade area, at \$166,269, was higher than the Town (\$129,777) and lower than the Rural Southern Ontario average dwellings values (\$170,052).

Table 8. Housing Tenure and Dwelling Characteristics

Housing Tenure and Dwelling Characteristics	Downtown Gananoque's Trade Area		Separated Town of Gananoque		Rural Southern Ontario	
		%		%		%
2001 Total Occupied private dwellings	7,778		2,260		1,496,610	
2001 Housing Ownership						
Owned	6,611	85%	1,585	70%	1,159,574	77%
Rented	1,166	15%	680	30%	334,577	22%
Occupied private dwellings by period of construction	7,778		2,260		1,496,610	
Before 1946	2,226	29%	970	43%	309,858	21%
1946 - 1960	958	12%	330	15%	203,738	14%
1961 - 1970	961	12%	260	12%	187,233	13%
1971 - 1980	1,215	16%	190	8%	265,684	18%
1981 - 1990	1,393	18%	350	15%	281,106	19%
1991 - 1995	456	6%	80	4%	123,138	8%
1996 - 2001	551	7%	90	4%	124,132	8%
Dominant period of construction	Before 1946	29%	Before 1946	43%	Before 1946	21%
Occupied private dwellings by maintenance required	7,778		2,260		1,496,610	
Regular maintenance only	4,831	62%	1,360	60%	1,000,711	67%
Minor repairs	2,244	29%	625	28%	385,332	26%
Major repairs	723	9%	265	12%	108,019	7%
2001 Type of Housing Units						
Single-detached house	6,575	85%	1,310	58%	1,137,930	76%
Semi-detached house	271	3%	185	8%	60,077	4%
Row house	132	2%	125	6%	72,451	5%
Apartment, detached duplex	64	1%	35	2%	29,383	2%
Apartment less than 5 storeys	564	7%	495	22%	132,376	9%
High-rise Apartment	120	2%	120	5%	56,950	4%
Mobile Home or Trailer	47	1%	0	0%	7,410	0%
Average value of dwellings	\$166,269		\$129,777		\$170,052	
Rented Dwellings	1,166		680		334,577	
Households spending 30% to 99% of household income on gross rent	409	35%	255	38%	114,256	34%
Owned Dwellings	6,611		1,585		1,159,574	
Households spending 30% or more of household income on owned shelter	849	13%	250	16%	169,230	15%

Source: Statistics Canada, 2001.

3.1.9 Educational Attainment

Although retailers are generally interested in income levels to determine potential demand, educational attainment is a useful indicator for specific types of products or to determine the socio-economic status of an area. In particular, the placement of bookstores is often based on the number of highly educated individuals in the trade area. Similarly, computer and software stores are often located in areas with high levels of education.

Table 9 shows the educational attainment for the population aged 20 and over in Gananoque's downtown trade area. Gananoque's downtown trade area has a lower percentage of people with less than a high school diploma (26%) when compared with Town of Gananoque (32%) and Rural Southern Ontario (27%). Inversely, the downtown trade area has a higher proportion of people with a university education (15%) compared to the Town of Gananoque (11%) and Rural Southern Ontario (13%).

Table 9. Educational Attainment

Educational Attainment	Downtown Gananoque's Trade Area		Separated Town of Gananoque		Rural Southern Ontario	
		%		%		%
2001 Total Population (over 20 years of age) by Educational Attainment	14,839		3,860		2,891,824	
Less than high school	3,832	26%	1,250	32%	791,851	27%
High School graduate	2,480	17%	710	18%	466,755	16%
Trades certificate	1,923	13%	450	12%	354,130	12%
College (with diploma)	2,727	18%	710	18%	544,772	19%
University (with bachelor's or higher)	2,297	15%	415	11%	374,985	13%

Source: Statistics Canada, 2001.

3.1.10 Employment

Table 10 presents the breakdown of employment statistics for residents in downtown Gananoque's trade area compared to the Town of Gananoque and Rural Southern Ontario, in 2001. Gananoque's downtown trade area and the Town of Gananoque both had a lower participation rate in the labour force (65% and 62%) when compared with Rural Southern Ontario (68%). Downtown Gananoque's trade area did have a lower unemployment rate (5%) than the Town of Gananoque (7%), which was consistent with the Rural Southern Ontario rate (5%).

Table 10. Employment

Employment	Downtown Gananoque's Trade Area	Separated Town of Gananoque	Rural Southern Ontario
Total Population 15 years and over by Labour Force Activity	16,145	4,145	3,182,869
In the labour force	10,438	2,555	2,163,530
Total Employed	9,894	2,385	2,049,042
Total Unemployed	557	170	114,990
Not in the labour force	5,707	1,600	1,018,963
Participation rate	64.70%	61.60%	68.00%
Unemployment rate	5.30%	6.70%	5.30%
<i>Employment-population ratio</i>	61.30%	57.50%	64.40%

Source: Statistics Canada, 2001.

3.1.11 Occupations

Many retailers use the concentration of occupations as another gauge of a market's taste preferences. For example, specialty apparel stores thrive on middle white-collar employment, while discount department stores and used car dealerships are successful in areas with a higher concentration of blue-collar workers. Office supply stores and large music and video stores are especially sensitive to the occupational profile. These retailers target growth areas with a majority of white-collar workers.

Table 11 shows the occupation groupings for the downtown trade area, Town of Gananoque and Rural Southern Ontario³. Gananoque's downtown trade area has a higher proportion of white-collar employees than the Town of Gananoque and Rural Southern Ontario (36% versus 34% and 33%). The number of blue-collar employees is higher in downtown Gananoque's trade area (29%) than the Town of Gananoque (25%), but lower than the Rural Southern Ontario rate (31%).

Table 11. Occupations

Occupations	Downtown Gananoque's Trade Area		Separated Town of Gananoque		Rural Southern Ontario	
		%		%		%
All occupations	10,340		2,515		2,138,997	
White Collar	3,728	36%	865	34%	710,728	33%
Service Sector	3,580	35%	945	38%	769,037	36%
Blue Collar	2,953	29%	635	25%	658,043	31%
Occupation - Not Applicable	118	1%	45	2%	25,055	1%

Source: Statistics Canada, 2001.

3.1.12 Mobility

Mobility refers to the movement of residents in and out of an area. In Gananoque's downtown trade area 12% of residents moved between 2000 and 2001. Six percent of these people moved within the trade area, while 6% moved into the trade area from another part of Ontario, Province, or Country. The mobility of the residents within the trade area over the five-year timeframe has a lower percentage of people that have moved (34%) compared with that of 36% for Town of Gananoque and 39% for Rural Southern Ontario. Of the people who moved in the trade area a lower percentage 19% were from another part of Ontario, Province, or Country, then both the Town and Rural Southern Ontario.

Table 12. Mobility

Mobility	Downtown Gananoque's Trade Area		Separated Town of Gananoque		Rural Southern Ontario	
		%		%		%
Total Population by 1 year mobility status	19,599		4,995		3,977,825	
Non-movers (same address one year ago)	17,285	88%	4,305	86%	3,479,900	87%
Movers	2,310	12%	700	14%	497,988	13%
Migrants	1,201	6%	335	7%	252,820	6%
Total Population by 5 year mobility status	18,791		4,765		3,783,630	
Non-movers (same address five years ago)	12,472	66%	2,950	62%	2,290,633	61%
Movers	6,319	34%	1,810	38%	1,492,800	39%
Migrants	3,505	19%	955	20%	793,741	21%

Source: Statistics Canada, 2001.

3.1.13 Ethnicity

The ethnic origin of potential customers in a trade area affects the relative demand for different types of goods and services. Therefore, knowing the ethnicity of an area is important when choosing the

³ A breakdown of the Occupations and their classification is available in the Glossary

merchandise to be carried. Correct assortments, fashion orientation, advertising media, and product selection are all influenced by ethnicity. Table 13 highlights that 10% of the population in the downtown Gananoque trade area is immigrants. This rate is higher than the Town of Gananoque at 8% but it is lower than the rate for Rural Southern Ontario at 14%.

Table 13. Ethnicity

Ethnicity	Downtown Gananoque's Trade Area		Separated Town of Gananoque		Rural Southern Ontario	
		%		%		%
Non-immigrant population	17,984		4,650		3,500,329	
Immigrants	1,731	10%	385	8%	503,211	14%
Top 5 Immigrant Places of Birth	United Kingdom		United Kingdom		United Kingdom	
	United States		United States		Netherlands	
	Netherlands		Netherlands		United States	
	Germany		Jamaica		Italy	
	Portugal		Greece		Germany	

4.0 Geodemographic for Downtown Gananoque's Trade Area

This section presents the Geodemographic data for Gananoque's downtown trade area. Geodemographic data is the identification of clusters of households on the basis of where they live and their demographic and economic characteristics. Environics Analytics has developed a categorization scheme that classifies all Canadians into one of 66 different lifestyle types. The Geodemographic data targets Canadian consumers using a cluster analysis of 2001 census demographics and exhaustive survey data on how Canadians spend their time and their money.

The Gananoque downtown trade area includes 16 of the 66 clusters as defined by Environics Analytics. Table 14 shows the number of households of each type that have been estimated for Gananoque along with the percentage of households. "Mr. & Ms. Manager", "Simple Pleasures", and "Tools & Trucks" are the three largest clusters at 12% of households in the Gananoque trade area. A detailed description of Gananoque's downtown trade area five clusters has been included in appendix 5.

Table 14. Geodemographic Clusters

PRIZM NAME	ESTIMATED 2007 TOTAL POPULATION	ESTIMATED 2007 TOTAL HOUSEHOLDS	%
Total	20,407	7,882	
Mr. & Ms. Manager	2414	984	12%
Simple Pleasures	2099	959	12%
Tools & Trucks	2679	951	12%
Lunch at Tim's	1897	859	11%
Rods & Wheels	2147	820	10%
Golden Ponds	1659	654	8%
Fields of Dreams	1596	544	7%
Suburban Gentry	1053	391	5%
Nearly Empty Nests	875	362	5%
Solo Scramble	623	312	4%
Heartlanders	716	302	4%
Ontario Originals	796	290	4%
Exurban Crossroads	677	254	3%
Money & Brains	502	200	3%
Unassigned	566	0	0%
Park Bench Seniors	108	0	0%

5.0 Household Expenditure Estimates

This section presents estimates of expenditures for trade area residents for particular products and services. Household spending on goods and services are key indicators in estimating consumer purchasing power and market potential. The Household Expenditure Potential data provides estimates of average annual expenditures for a wide range of goods and services for Canadian households. The data includes both average dollars per household and total dollars spent within the downtown trade area.

This dataset can be used to:

- Estimate total expenditure for a good or service in the trade area.
- Compare local supply against market demand.
- Used as a reference in conjunction with a business' own sales data to derive first approximation estimates of market share. This aids in developing effective strategies for business development.

Readers are cautioned that the methodology of creating these estimates reflects economic and demographic assumptions and limitations (see Appendix A) as well as possible errors resulting from local survey sampling. It is recommended that anyone interpreting these estimates should familiarize themselves with these factors before drawing any conclusions based on the information provided.

The following tables include total expenditure potential that fall under the major categories listed below. The units of measure are total expenditure in Gananoque's downtown trade area, annual household expenditures, and index. The index refers the difference in expenditure between Gananoque's downtown trade area and the Town of Gananoque against the estimated expenditures in Rural Southern Ontario.

2005 Canadian Expenditure Potential Categories

- *Food*
- *Shelter*
- *Household Operation*
- *Household Furnishings and Equipment*
- *Clothing*
- *Transportation*
- *Health Care*
- *Personal Care*
- *Recreation*
- *Reading Materials and Other Printed matter*
- *Tobacco Products and Alcoholic Beverage*

*Expenditure Potential represents the expenditure patterns of Canadians based on Statistics Canada's Survey of Household Spending, MapInfo Canada's Estimates and Projections and PSYTE Canada Advantage cluster system. For more information on the methodology used by MapInfo please refer to Appendix 1.

Expenditure Potential Summary

2005 Expenditure Potential Summary	Downtown Gananoque's Trade Area			Separated Town of Gananoque		Rural Southern Ontario	
	Total Expenditure	Annual-Household Expenditures	Index	Annual-Household Expenditures	Index	Annual-Household Expenditures	Index
Total current consumption	\$410,696,885	\$50,818	104	\$40,400	82	\$48,851	100
Food	\$64,954,393	\$7,623	104	\$6,627	91	\$7,267	100
Shelter	\$112,601,205	\$13,215	103	\$10,905	85	\$12,809	100
Household operation	\$28,643,755	\$3,362	105	\$2,723	85	\$3,195	100
Household furnishings and equipment	\$21,117,825	\$2,478	113	\$1,642	75	\$2,183	100
Clothing	\$24,748,251	\$2,905	103	\$2,303	81	\$2,816	100
Transportation	\$81,945,151	\$9,617	103	\$6,977	75	\$9,270	100
Health care	\$14,149,172	\$1,661	106	\$1,307	83	\$1,566	100
Personal care	\$9,672,862	\$1,135	101	\$967	86	\$1,115	100
Recreation	\$36,438,397	\$4,276	98	\$3,181	73	\$4,357	100
Reading materials and other printed matter	\$3,072,461	\$361	106	\$289	85	\$337	100
Tobacco products and alcoholic beverages	\$13,353,413	\$1,567	106	\$1,498	101	\$1,475	100

Source: MapInfo Canada, 2005.

Food

2005 Expenditure Potential - Food	Downtown Gananoque's Trade Area			Separated Town of Gananoque		Rural Southern Ontario	
	Total Expenditure	Annual-Household Expenditures	Index	Annual-Household Expenditures	Index	Annual-Household Expenditures	Index
Food	\$64,954,393	\$7,623	104	\$6,627	91	\$7,267	100
Food purchased from stores	\$50,241,829	\$5,896	105	\$5,218	93	\$5,563	100
Food purchased from restaurants	\$14,249,539	\$1,672	100	\$1,374	82	\$1,659	100

Source: MapInfo Canada, 2005.

Shelter

2005 Expenditures Potential - Shelter	Downtown Gananoque's Trade Area			Separated Town of Gananoque		Rural Southern Ontario	
	Total Expenditure	Annual-Household Expenditures	Index	Annual-Household Expenditures	Index	Annual-Household Expenditures	Index
Shelter	\$112,601,205	\$13,215	103	\$10,905	85	\$12,809	100
Principal accommodation	\$105,736,165	\$12,409	102	\$10,347	85	\$12,068	100
Rented living quarters	\$18,071,501	\$2,121	102	\$3,025	145	\$2,075	100
Rent	\$17,624,844	\$2,068	102	\$2,976	147	\$2,024	100
Tenants' maintenance, repairs and alterations	\$208,503	\$24	110	\$16	72	\$22	100
Tenants' insurance premiums	\$238,318	\$28	97	\$32	113	\$29	100
Owned living quarters	\$65,417,780	\$7,678	100	\$5,183	67	\$7,629	100
Regular mortgage payments	\$34,180,613	\$4,012	95	\$2,718	64	\$4,183	100
Maintenance, repairs and replacements	\$7,936,268	\$931	115	\$600	74	\$808	100
Condominium charges	\$737,918	\$87	86	\$55	54	\$100	100
Property taxes	\$14,249,868	\$1,672	103	\$1,174	72	\$1,623	100
Homeowners' insurance premiums	\$4,090,147	\$480	114	\$341	81	\$418	100
Other expenditures for owned living quarters	\$4,222,444	\$496	99	\$295	59	\$497	100
Water, fuel and electricity	\$22,234,799	\$2,610	110	\$2,138	90	\$2,363	100
Other accommodation	\$6,869,267	\$806	108	\$558	75	\$742	100
Owned vacation home	\$1,862,326	\$219	110	\$136	68	\$198	100
Traveller accommodation	\$5,007,044	\$588	108	\$422	77	\$544	100
Hotels and motels	\$3,636,806	\$427	112	\$318	83	\$380	100
Other accommodation away from home	\$1,370,353	\$161	97	\$104	63	\$164	100

Source: MapInfo Canada, 2005.

Household Furnishings

2005 Expenditure Potential - Household Furnishings	Downtown Gananoque's Trade Area			Separated Town of Gananoque		Rural Southern Ontario	
	Total Expenditure	Annual-Household Expenditures	Index	Annual-Household Expenditures	Index	Annual-Household Expenditures	Index
Household furnishings	\$10,890,730	\$1,278	119	\$804	75	\$1,071	100
Furniture	\$7,972,067	\$936	128	\$573	78	\$731	100
Rugs, mats and underpadding	\$379,561	\$45	117	\$35	92	\$38	100
Window coverings and household textiles	\$1,564,053	\$184	99	\$117	63	\$185	100
Art, antiques and decorative ware	\$975,449	\$114	97	\$80	67	\$117	100

Source: MapInfo Canada, 2005.

Household Operation

2005 Expenditure Potential - Household Operation	Downtown Gananoque's Trade Area			Separated Town of Gananoque		Rural Southern Ontario	
	Total Expenditure	Annual-Household Expenditures	Index	Annual-Household Expenditures	Index	Annual-Household Expenditures	Index
Household operation	\$28,643,755	\$3,362	105	\$2,723	85	\$3,195	100
Communications	\$11,528,596	\$1,353	104	\$1,197	92	\$1,292	100
Telephone	\$7,855,799	\$922	108	\$823	97	\$849	100
Cellular services	\$1,852,923	\$217	93	\$185	79	\$233	100
Internet services	\$1,234,325	\$145	96	\$130	86	\$150	100
Postal and other communication services	\$585,979	\$69	113	\$59	96	\$61	100
Child care expenses	\$2,749,226	\$323	99	\$236	72	\$325	100
Child care outside the home	\$2,033,226	\$239	100	\$167	70	\$238	100
Child care in the home	\$716,080	\$84	96	\$68	78	\$87	100
Domestic and other custodial services	\$1,033,539	\$121	99	\$76	63	\$121	100
Pet expenses	\$4,019,164	\$472	107	\$337	77	\$438	100
Purchase of pets	\$150,990	\$18	77	\$9	38	\$23	100
Pet food	\$2,191,056	\$257	115	\$193	86	\$223	100
Purchase of pet related goods	\$428,544	\$50	107	\$39	83	\$47	100
Veterinarian and other services	\$1,248,875	\$147	100	\$96	66	\$146	100
Household cleaning supplies	\$2,356,221	\$277	104	\$246	93	\$264	100
Paper, plastic and foil household supplies	\$3,034,579	\$356	105	\$319	94	\$337	100
Garden supplies and services	\$3,186,438	\$374	110	\$238	70	\$338	100
Other household supplies	\$736,786	\$86	108	\$72	90	\$80	100

Source: MapInfo Canada, 2005.

Household Equipment

2005 Expenditure Potential - Household Equipment	Downtown Gananoque's Trade Area			Separated Town of Gananoque		Rural Southern Ontario	
	Total Expenditure	Annual-Household Expenditures	Index	Annual-Household Expenditures	Index	Annual-Household Expenditures	Index
Household equipment	\$8,600,511	\$1,009	105	\$721	75	\$955	100
Household appliances	\$3,666,332	\$430	107	\$325	80	\$401	100
Room air conditioners, portable humidifiers and dehumidifiers	\$111,996	\$13	104	\$12	97	\$13	100
Refrigerators and freezers	\$804,975	\$94	109	\$66	76	\$87	100
Cooking stoves and ranges	\$616,807	\$72	133	\$50	93	\$54	100
Microwave and convection ovens	\$133,922	\$16	108	\$9	61	\$14	100
Gas barbecues	\$198,209	\$23	86	\$21	78	\$27	100
Small electric food preparation appliances	\$331,644	\$39	95	\$32	79	\$41	100
Washers and dryers	\$599,149	\$70	106	\$54	82	\$66	100
Vacuum cleaners and other rug cleaning equipment	\$351,765	\$41	107	\$29	74	\$39	100
Portable dishwashers	\$59,806	\$7	90	\$6	82	\$8	100
Sewing machines	\$126,486	\$15	93	\$15	90	\$16	100
Other electric equipment and appliances	\$177,694	\$21	102	\$17	84	\$20	100
Attachments and parts for major appliances	\$155,064	\$18	102	\$13	72	\$18	100
Home and workshop tools and equipment	\$1,371,754	\$161	108	\$116	77	\$149	100
Power tools and equipment	\$815,237	\$96	105	\$69	76	\$90	100
Other tools	\$556,595	\$65	111	\$46	79	\$58	100
Lawn, garden and snow-removal tools and equipment	\$1,433,097	\$168	105	\$104	65	\$160	100
Lamps and lampshades	\$192,841	\$23	100	\$16	69	\$23	100
Non-electric kitchen and cooking equipment	\$478,591	\$56	107	\$44	84	\$52	100
Tableware, flatware and knives	\$169,011	\$20	83	\$13	55	\$24	100
Non-electric cleaning equipment	\$339,542	\$40	104	\$29	77	\$38	100
Luggage	\$224,992	\$26	107	\$18	72	\$25	100
Home security equipment	\$80,386	\$9	87	\$7	63	\$11	100
Other household equipment, parts and accessories	\$644,961	\$76	103	\$49	67	\$73	100
Maintenance and repairs of furniture and equipment	\$880,249	\$103	118	\$52	59	\$87	100
Furniture, carpeting and household textiles	\$525,160	\$62	123	\$29	57	\$50	100
Major household appliances	\$184,769	\$22	101	\$12	55	\$21	100
Other maintenance and repairs of furniture and equipment	\$170,508	\$20	123	\$11	69	\$16	100
Services related to furnishings and equipment	\$746,693	\$88	124	\$65	92	\$71	100

Source: MapInfo Canada, 2005.

Clothing

2005 Expenditure Potential Clothing	Downtown Gananoque's Trade Area			Separated Town of Gananoque		Rural Southern Ontario	
	Total Expenditure	Annual- Household Expenditures	Index	Annual- Household Expenditures	Index	Annual- Household Expenditures	Index
Clothing	\$24,748,251	\$2,905	103	\$2,303	81	\$2,816	100
Women's and Girls' wear (4 years and over)	\$12,397,006	\$1,455	102	\$1,145	80	\$1,419	100
Clothing	\$7,272,173	\$853	101	\$648	77	\$839	100
Footwear	\$1,953,774	\$229	102	\$195	87	\$223	100
Accessories	\$411,920	\$48	101	\$41	86	\$48	100
Jewellery and watches	\$1,396,838	\$164	110	\$122	82	\$149	100
Clothing gifts to non-household members	\$1,362,700	\$160	99	\$139	86	\$161	100
Men's and Boys' wear (4 years and over)	\$9,803,101	\$1,151	105	\$901	82	\$1,094	100
Clothing	\$5,931,717	\$696	105	\$537	81	\$660	100
Footwear	\$1,881,887	\$221	106	\$174	83	\$208	100
Accessories	\$341,783	\$40	100	\$34	86	\$40	100
Jewellery and watches	\$499,010	\$59	113	\$46	88	\$51	100
Clothing gifts to non-household members	\$1,149,128	\$135	99	\$110	81	\$135	100
Children's wear (under 4 years)	\$809,242	\$95	99	\$83	87	\$95	100
Clothing and cloth diapers	\$245,190	\$29	90	\$25	77	\$32	100
Footwear	\$36,149	\$4	84	\$4	76	\$5	100
Clothing gifts to non-household members	\$528,134	\$62	105	\$55	93	\$58	100
Clothing material, notions and services	\$1,739,213	\$204	98	\$174	83	\$207	100
Clothing material (excluding household textiles)	\$231,336	\$27	103	\$22	83	\$26	100
Yarn and thread	\$218,533	\$26	118	\$17	79	\$22	100
Services	\$1,289,582	\$151	94	\$135	84	\$160	100
Dressmaking, tailoring, clothing storage and other	\$61,767	\$7	81	\$6	70	\$9	100
Laundry and dry-cleaning service	\$634,886	\$75	93	\$50	61	\$80	100
Laundromats and self-service dry cleaning	\$399,308	\$47	99	\$65	138	\$47	100
Maintenance, repair and alteration	\$193,983	\$23	96	\$14	59	\$24	100

Source: MapInfo Canada, 2005.

Transportation

2005 Expenditure Potential - Transportation	Downtown Gananoque's Trade Area			Separated Town of Gananoque		Rural Southern Ontario	
	Total Expenditure	Annual- Household Expenditures	Index	Annual- Household Expenditures	Index	Annual- Household Expenditures	Index
Transportation	\$81,945,151	\$9,617	103	\$6,977	75	\$9,270	100
Private transportation	\$76,789,016	\$9,012	104	\$6,421	74	\$8,656	100
Purchase of automobiles and trucks	\$31,115,755	\$3,652	105	\$2,385	69	\$3,447	100
Automobiles	\$17,324,247	\$2,033	102	\$1,321	66	\$1,981	100
Trucks (including vans)	\$15,767,778	\$1,851	111	\$1,206	72	\$1,667	100
Purchase of automotive accessories	\$413,865	\$49	124	\$35	90	\$39	100
Rented and leased automobiles and trucks	\$5,841,503	\$686	100	\$449	66	\$679	100
Gasoline and other fuels	\$17,988,790	\$2,111	104	\$1,542	76	\$2,027	100
Tires, batteries, and other automotive parts and supplies	\$2,429,718	\$285	104	\$240	88	\$272	100
Maintenance and repair	\$5,370,248	\$630	101	\$517	82	\$623	100
Taxi	\$338,760	\$40	86	\$63	136	\$46	100
Airplane	\$3,032,634	\$356	100	\$277	78	\$354	100
Train	\$100,743	\$12	108	\$8	77	\$11	100
Highway bus	\$154,619	\$18	101	\$23	127	\$18	100
Household moving, storage and delivery services	\$357,535	\$42	106	\$32	80	\$39	100

Source: MapInfo Canada, 2005.

Health Care

2005 Expenditure Potential - Health care	Downtown Gananoque's Trade Area			Separated Town of Gananoque		Rural Southern Ontario	
	Total Expenditure	Annual- Household Expenditures	Index	Annual- Household Expenditures	Index	Annual- Household Expenditures	Index
Health care	\$14,149,172	\$1,661	106	\$1,307	83	\$1,566	100
Direct costs to household	\$10,030,534	\$1,177	105	\$994	88	\$1,120	100
Health care supplies	\$268,947	\$32	92	\$31	91	\$34	100
Medicinal and pharmaceutical products	\$4,018,006	\$472	108	\$418	96	\$433	100
Physicians' care	\$108,141	\$13	96	\$5	39	\$13	100
Other health care practitioners	\$779,999	\$92	90	\$90	88	\$102	100
Eye-care goods and services	\$1,470,379	\$173	101	\$139	82	\$169	100
Prescription eye wear	\$1,033,494	\$121	95	\$105	82	\$127	100
Other eye care goods	\$190,834	\$22	102	\$17	76	\$22	100
Eye care services (e.g., surgery, exams)	\$246,282	\$29	139	\$17	83	\$21	100
Dental services	\$3,015,100	\$354	108	\$277	84	\$326	100
Hospital care	\$88,338	\$10	114	\$13	147	\$9	100
Other medical services	\$282,509	\$33	97	\$19	55	\$34	100
Health insurance premiums	\$4,118,744	\$483	108	\$313	70	\$445	100
Public hospital, medical and drug plans	\$818,881	\$96	86	\$63	57	\$111	100
Private health insurance plans	\$3,299,935	\$387	115	\$250	74	\$335	100

Source: MapInfo Canada, 2005.

Personal Care

2005 Expenditure Potential - Personal care	Downtown Gananoque's Trade Area			Separated Town of Gananoque		Rural Southern Ontario	
	Total Expenditure	Annual- Household Expenditures	Index	Annual- Household Expenditures	Index	Annual- Household Expenditures	Index
Personal care	\$9,672,862	\$1,135	101	\$967	86	\$1,115	100
Personal care supplies and equipment	\$5,739,560	\$674	101	\$609	91	\$664	100
Personal care preparations	\$4,702,375	\$552	101	\$495	91	\$542	100
Disposable diapers	\$330,175	\$39	94	\$41	99	\$41	100
Electric hair-styling and personal care appliances	\$168,025	\$20	95	\$17	83	\$21	100
Other personal care supplies and equipment	\$539,351	\$63	105	\$56	92	\$60	100
Personal care services	\$3,933,407	\$462	102	\$359	79	\$451	100
Hair grooming	\$3,487,566	\$409	103	\$316	79	\$397	100
Other personal services	\$445,952	\$52	97	\$43	79	\$54	100

Source: MapInfo Canada, 2005.

Recreation

2005 Expenditure Potential - Recreation	Downtown Gananoque's Trade Area			Separated Town of Gananoque		Rural Southern Ontario	
	Total Expenditure	Annual- Household Expenditures	Index	Annual- Household Expenditures	Index	Annual- Household Expenditures	Index
Recreation	\$36,438,397	\$4,276	98	\$3,181	73	\$4,357	100
Recreation equipment and associated services	\$11,227,017	\$1,318	103	\$988	77	\$1,275	100
Sports and athletic equipment	\$1,773,597	\$208	106	\$147	75	\$195	100
Playground equipment, above- ground pools and accessories	\$349,174	\$41	128	\$25	78	\$32	100
Toys and children's vehicles	\$1,206,843	\$142	107	\$113	85	\$132	100
Electronic games and parts	\$545,203	\$64	103	\$50	81	\$62	100
Video game rental	\$102,100	\$12	83	\$12	85	\$14	100
Artists' materials, handicraft, hobbycraft kits and materials	\$442,704	\$52	99	\$40	76	\$52	100
Computer equipment and supplies	\$3,764,088	\$442	106	\$337	81	\$414	100
Computer hardware	\$2,885,823	\$339	106	\$257	80	\$318	100
Computer software	\$315,657	\$37	98	\$29	75	\$38	100
Computer supplies and other equipment	\$562,805	\$66	112	\$52	88	\$59	100
Photographic goods and services	\$1,799,300	\$211	102	\$163	79	\$205	100
Musical instruments, parts and accessories	\$326,818	\$38	77	\$33	66	\$50	100
Collectors' items (e.g., stamps, coins)	\$166,691	\$20	67	\$11	38	\$29	100
Camping, picnic equipment and accessories (excluding BBQs)	\$306,027	\$36	101	\$30	84	\$35	100
Supplies and parts for recreational equipment	\$323,750	\$38	110	\$20	59	\$35	100
Rental, maintenance and repairs of equipment	\$122,086	\$14	72	\$5	25	\$20	100

Source: MapInfo Canada, 2005.

Recreation Vehicles

2005 Expenditure Potential - Recreation Vehicles	Downtown Gananoque's Trade Area			Separated Town of Gananoque		Rural Southern Ontario	
	Total Expenditure	Annual- Household Expenditures	Index	Annual- Household Expenditures	Index	Annual- Household Expenditures	Index
Recreation vehicles and associated services	\$4,503,038	\$528	68	\$366	47	\$774	100
Purchase of recreation vehicles	\$1,947,731	\$229	51	\$176	39	\$442	100
Bicycles, parts and accessories	\$468,214	\$55	73	\$48	63	\$75	100
Other recreational vehicles and outboard motors	\$1,479,656	\$174	47	\$128	34	\$368	100
Travel trailers	\$231,199	\$27	45	\$15	26	\$59	100
Tent trailers	\$60,048	\$7	53	\$2	13	\$13	100
Motorcycles	\$205,256	\$24	38	\$19	29	\$63	100
Snowmobiles	\$366,431	\$43	61	\$28	39	\$70	100
Motor homes	\$23,297	\$3	52	\$1	20	\$5	100
Truck campers	\$13,350	\$2	64	\$0	14	\$2	100
Boats	\$196,603	\$23	34	\$29	43	\$66	100
Outboard motors and personal watercraft	\$31,811	\$4	27	\$5	38	\$13	100
Other recreation vehicle purchases	\$352,405	\$41	55	\$29	38	\$74	100
Operation of recreational vehicles	\$2,555,364	\$300	90	\$190	57	\$332	100

Source: MapInfo Canada, 2005.

Recreation Services

2005 Expenditures Potential Recreation Services	Downtown Gananoque's Trade Area			Separated Town of Gananoque		Rural Southern Ontario	
	Total Expenditure	Annual- Household Expenditures	Index	Annual- Household Expenditures	Index	Annual- Household Expenditures	Index
Recreation services	\$15,183,284	\$1,782	107	\$1,266	76	\$1,662	100
Entertainment	\$6,838,356	\$803	105	\$704	92	\$757	100
Movie theatres	\$938,277	\$110	101	\$89	82	\$108	100
Live sports events	\$370,207	\$43	97	\$27	61	\$45	100
Live performing arts	\$761,141	\$89	105	\$61	72	\$85	100
Admission to museums and other activities	\$463,449	\$54	117	\$37	80	\$46	100
Rental of cablevision and satellite services	\$4,305,794	\$505	106	\$489	103	\$474	100
Use of recreation facilities	\$4,370,715	\$513	109	\$324	69	\$467	100
Membership and single usage fees	\$3,877,971	\$455	109	\$280	67	\$417	100
Golfing	\$1,350,967	\$159	110	\$78	54	\$144	100
Bowling	\$181,541	\$21	99	\$21	98	\$21	100
Skiing/Snowboarding	\$278,725	\$33	95	\$22	63	\$34	100
Health clubs and recreation associations	\$838,490	\$98	98	\$75	75	\$100	100
Other sports activities	\$1,228,701	\$144	122	\$84	71	\$118	100
Video, pinball and carnival games	\$104,718	\$12	107	\$11	92	\$11	100
Children's camps	\$388,285	\$46	117	\$33	85	\$39	100
Package travel tours	\$3,779,113	\$444	107	\$222	53	\$414	100
Other recreational services	\$195,422	\$23	93	\$17	71	\$24	100

Source: MapInfo Canada, 2005.

Home Entertainment

2005 Expenditure Potential - Home Entertainment	Downtown Gananoque's Trade Area			Separated Town of Gananoque		Rural Southern Ontario	
	Total Expenditure	Annual-Household Expenditures	Index	Annual-Household Expenditures	Index	Annual-Household Expenditures	Index
Home entertainment equipment and services	\$5,525,393	\$648	100	\$561	86	\$646	100
Equipment	\$4,447,189	\$522	100	\$448	85	\$522	100
Audio (e.g., radio, CD players, speakers)	\$944,034	\$111	106	\$103	99	\$104	100
Portable	\$414,789	\$49	128	\$39	103	\$38	100
Non-portable	\$529,344	\$62	94	\$64	96	\$66	100
Pre-recorded audio and video cassette tapes/CDs/DVDs	\$1,473,698	\$173	100	\$142	82	\$172	100
Blank audio and video tapes	\$125,633	\$15	105	\$13	90	\$14	100
Televisions, VCRs, camcorders and other television components	\$1,647,975	\$193	95	\$169	82	\$203	100
Other home entertainment equipment	\$256,264	\$30	104	\$21	72	\$29	100
Services	\$1,078,323	\$127	102	\$114	91	\$124	100
Rental of videotapes and DVDs	\$948,353	\$111	102	\$98	90	\$109	100
Rental of home entertainment equipment and other services	\$32,908	\$4	123	\$3	107	\$3	100
Maintenance and repair of home entertainment equipment	\$97,268	\$11	95	\$12	98	\$12	100

Source: MapInfo Canada, 2005.

Reading Materials

2005 Expenditure Potential - Reading Materials	Downtown Gananoque's Trade Area			Separated Town of Gananoque		Rural Southern Ontario	
	Total Expenditure	Annual-Household Expenditures	Index	Annual-Household Expenditures	Index	Annual-Household Expenditures	Index
Reading materials and other printed matter	\$3,072,461	\$361	106	\$289	85	\$337	100
Newspapers	\$1,175,219	\$138	109	\$118	93	\$126	100
Magazines and periodicals	\$682,618	\$80	108	\$60	81	\$74	100
Books and pamphlets (excluding school books)	\$1,013,161	\$119	104	\$93	82	\$114	100
Maps, sheet music and other printed matter	\$71,791	\$8	82	\$6	62	\$10	100
Services related to reading materials	\$130,121	\$15	111	\$12	86	\$14	100

Source: MapInfo Canada, 2005.

Alcohol and Tobacco

2005 Expenditure Potential - Alcohol and Tobacco	Downtown Gananoque's Trade Area			Separated Town of Gananoque		Rural Southern Ontario	
	Total Expenditure	Annual-Household Expenditures	Index	Annual-Household Expenditures	Index	Annual-Household Expenditures	Index
Tobacco products and alcoholic beverages	\$13,353,413	\$1,567	106	\$1,498	101	\$1,475	100
Tobacco products and smokers' supplies	\$6,624,029	\$777	111	\$782	112	\$696	100
Alcoholic beverages	\$6,729,503	\$790	101	\$717	91	\$779	100
Served on licensed premises	\$2,119,540	\$249	94	\$233	88	\$262	100
Purchased from stores	\$4,370,124	\$513	105	\$465	95	\$486	100
Self-made alcoholic beverages	\$240,078	\$28	92	\$19	61	\$30	100

Source: MapInfo Canada, 2005.

Appendix 1. Estimates and Projections

Estimates and Projections

2005 Edition

Methodology Statement

MapInfo Canada produces a set of estimates and projections annually for population by age and sex, households, and aggregate and average household income. Although the lowest level for which the data are presented here is the census subdivision (CSD) level, the estimating methodology involves a combination of top-down methods (national to CSD), using traditional demographic estimation and projection techniques, and bottom-up methods (dissemination area to CSD) using demographic techniques along with proprietary spatial modeling techniques.

Control totals, based on an economic-demographic model, were provided by Strategic Projections Inc. (SPI) for total population at the CSD level and households at the census division (CD) level. MapInfo Canada expanded these basic demographic estimates and projections to include the following characteristics at the CSD level for this publication: population by age and sex, households by housing type and tenure, educational attainment, marital status, labour force characteristics, family characteristics, home language, household income, consumer spending, retail sales and daytime population.

Total population and household counts from the 2001 Census were available at the time of the development of the estimates and projections for this volume. However, estimates of net census undercount were not yet available. Therefore, using the recommended Statistics Canada post-censal estimates of net undercoverage from the 1996 Census coverage evaluation survey, MapInfo Canada made undercount adjustments to the 2001 base population that conform to the likely distribution of the population missed in the 2001 Census.

MapInfo Canada produced all current and projected variables for this publication at the new dissemination area (DA) level and aggregated results to all higher levels of geography. As of the 2001 Census, the DA replaces the enumeration area (EA) as the lowest level for which census data are published. For this purpose, MapInfo Canada reconfigured all relevant historical demographic data at the EA level onto the new 2001 dissemination area cartography. Differential growth trends across all geographies are captured by taking into account patterns of historical growth, local population density, and recent housing start development trends. The bottom-up variables were made consistent with the top-down "control totals" through a process of iterative proportional fitting which ensures both horizontal and vertical consistency across all geographic layers.

Population & Households

MapInfo Canada implemented a small-area demographic estimation model for all dissemination areas (DAs) using census division (CD) level control totals for population and households. Relative population growth at the census subdivision (CSD) level informed the allocation of demographic components below the CD level.

The total population growth in each CD was estimated through an economic-demographic model. Age and sex distributions were projected by a demographic cohort-component model. The process begins with base year data from the 2001 census, which provides the population by single years of age for males and females. After adjustments for undercount, the population in each age group is then estimated for the current year (2005) and projected for subsequent years to 2010. For example, the total population in year 2010 in each CD is equal to the population in 2005, plus births, minus deaths, plus net migration (in or out) that are likely to occur during the period 2005 to 2010.

CSD level data are derived from the CD results in a manner consistent with expected differential growth patterns among CSD populations. Households are first generated by applying maintainer rates by age to the population by age, then controlled to the results of national and provincial household projections.

Income

MapInfo Canada developed income estimates and projections for households, families and working men and women. The model used inflation-controlled growth factors after tracking income trends at the provincial level and mapping historical income data for enumeration areas to the new dissemination areas. Where income

data are suppressed by Statistics Canada, MapInfo Canada applied additional modeling procedures to estimate household income for the base year. The small area estimates were then controlled to SPI's CD level income estimates and projections. SPI's estimates and projections take into account the impact of the following phenomena: (a) expected future gains in Canadian real incomes per household; (b) projected shifts over time at the CD level in the age distribution of household maintainers and (c) growth in provincial and national aggregate household income. Provincial household income growth rates are constrained to SPI's national and provincial economic forecast totals. Income is expressed in current dollars (2005).

Daytime Population 2005 Edition

Methodology Statement

A "component method" was employed which used the following DA-level components: the at-home population by age group (under 15 years, 15 to 64 years, and 65+ years) and daytime employees who work in the DA from business data geocoded to each DA. The sum of the at-home population and the at-work population (daytime employees) equals the daytime population. People who live in the DA but who participate in the labour force are generally assumed to work outside their DA of residence. Constraints include the reconciling of daytime population with total population within major labour markets and within provinces for areas outside major labour markets.

Canada Expenditure Potential 2005 Edition

Methodology Statement

Respondents to Statistics Canada's SHS questionnaire recall amounts spent on several hundred consumer goods and services, during the previous calendar year. Several features of the survey assist the respondents in recalling their expenditures. Statistics Canada summarizes expenditure data of the 16,385 full year households by PSYTE® Canada Advantage cluster for detailed consumer expenditure variables based on reference material provided by MapInfo Canada. MapInfo Canada analyzes these data to discern patterns and correlates to estimate missing values using a range of statistical methods. Expenditure estimates are modeled for small areas based on national Canada Expenditure Potential average household expenditure data (proportions) by PSYTE® Canada Advantage cluster, and MapInfo Canada's current household, income and expenditure estimates.

Appendix 2. Glossary of Terms

Here you will find some background information and rationale on the datasets and software that were used to perform the trade area analysis using a Geographic Information System.

Census Data

The Canadian Census is conducted once every five years, with a questionnaire being distributed to every household in the country. Each household is required by law to complete this questionnaire, making it the most comprehensive survey of the country's population. In its entirety, the Census consists of two data sets: the 2A data set that contains responses to a list of questions that are asked of every household, and the 2B data set that is derived from a more detailed list of questions distributed to one in five Canadian households.

Census Geography

The collection of Census data would not nearly be as meaningful if there was no means of relating the data to some spatial or geographic unit of reference. Data is aggregated and made available to the public at different geographic units.

To increase the accuracy of the trade area analysis, it was important that the smallest geographic level of census data was used. These are 'dissemination areas'. Dissemination areas are a useful level of geography to tabulate information when conducting a detail analysis of an area (helps to ensure that the resulting compilation of data will accurately represent the population of the trade area, which do not conform to municipal boundaries). Conducting data analysis at the DA level insures a more precise and accurate picture of "who is within the trade area" and aid in the development of appropriate downtown strategies.

Dissemination Areas (DA)

The DA is the smallest unit of Census geography at which data are readily available. On average, a dissemination area comprises a small area composed of one or more neighbouring blocks, with a population of 400 to 700 persons.

Geographic Information Systems (GIS)

The term GIS is generally used to describe a technology comprised of hardware, software, and data that integrates computerized mapping and database management and/or analysis functions.

Appendix 3. Occupation Breakdown

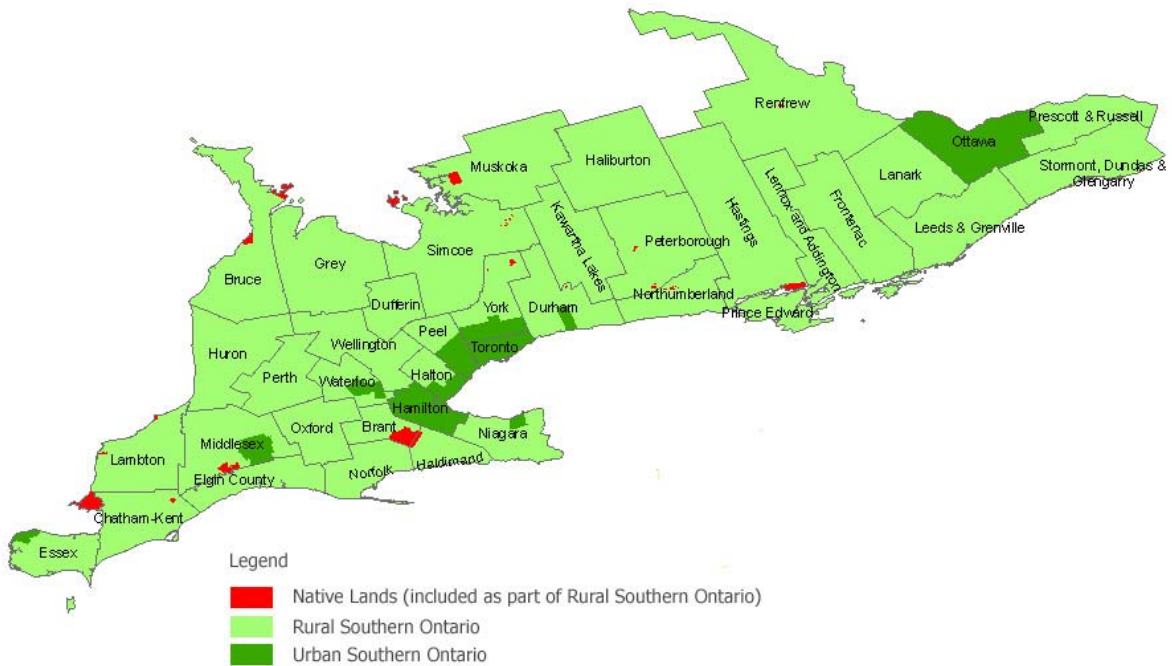
2001- Labour Force by Occupation	Classification
<i>Management</i>	
Senior management	White Collar
Specialist managers	White Collar
Managers in retail trade, food and accommodation	White Collar
Other managers	White Collar
<i>Business, finance and administrative</i>	
Professional	White Collar
Finance and insurance	White Collar
Secretaries	Service Sector
Administrative and regulatory	Service Sector
Clerical supervisors	Service Sector
Clerical occupations	Service Sector
<i>Natural and applied sciences</i>	
Professional	White Collar
Technical	White Collar
<i>Health occupations</i>	
Professional	White Collar
Nurses and supervisors	White Collar
Technical occupations	White Collar
Assisting/support occupations	Service Sector
<i>Social science, education, government and religion</i>	
Judges, lawyers, psychologists, social workers, ministers of religion, policy and program officers	White Collar
Teachers and professors	White Collar
Paralegals, social service workers and occupations in education and religion	Service Sector
<i>Art, culture, recreation and sport</i>	
Professional occupations	White Collar
Technical occupations	White Collar
<i>Sales and service</i>	
Supervisors	White Collar
Wholesale, technical, insurance, real estate sales, retail, wholesale and grain buyers	White Collar
Retail salespersons and clerks	Service Sector
Cashiers	Service Sector
Chefs and cooks	Service Sector
Food and beverage service	Service Sector
Protective services	Service Sector
Travel and accommodation, recreation and sport attendants	Service Sector
Childcare and home support	Service Sector
Other sales and service	Service Sector
<i>Trades, transport and equipment operators and related</i>	
Contractors and supervisors	Blue Collar
Construction trades	Blue Collar
Stationary engineers, power station operators, electrical and telecommunications	Blue Collar
Machinists, metal forming, shaping and erecting	Blue Collar
Mechanics	Blue Collar
Other trades	Blue Collar
Heavy equipment, crane operators and drillers	Blue Collar
Transportation equipment operators, excluding labourers	Blue Collar
Helpers and labourers	Blue Collar
<i>Primary industry-specific</i>	
Agriculture excluding labourers	Blue Collar
Forestry, mining, oil and gas extraction, and fishing, excluding labourers	Blue Collar
Primary production labourers	Blue Collar
<i>Processing, manufacturing and utilities</i>	
Supervisors in manufacturing	Blue Collar
Machine operators in manuf.	Blue Collar
Assemblers in manufacturing	Blue Collar
Labourers in processing, manufacturing and utilities	Blue Collar

Appendix 4. Definition of Rural Southern Ontario

Rural Southern Ontario definition is based on the Ministry of Agriculture, Food and Rural Affairs, Regional Economic Development Teams boundaries which are the Southern portion of the province outside of:

- The City of Hamilton
- The City of Ottawa
- The City of London
- The City of Windsor
- The Greater Toronto Area
- The Region of Niagara
- The Region of Waterloo

Within these seven areas, lower tier municipalities with a population of less than 100,000 are also considered rural.



Appendix 5. Geodemographic Cluster Descriptions

E1

10 - MR. & MS. MANAGER

High-achieving dual-income households in exurbia

Population	872,993 (2.91% of Canada)
Households	281,784 (2.44% of Canada)
Average Household Income	\$88,255
Housing Tenure	Homeowners
Average Dwelling Value	\$193,671
Education	University/College
Occupation	White Collar & Service Sector
Ethnic Presence	Low
Sample Social Value	Openness toward others

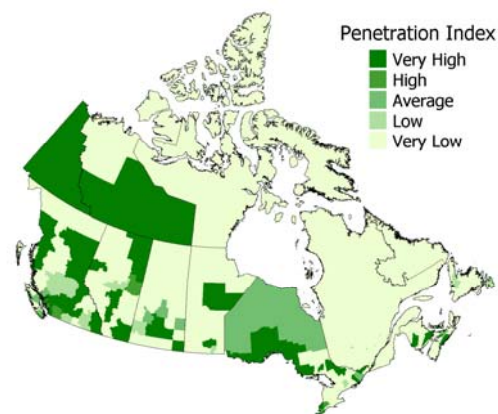
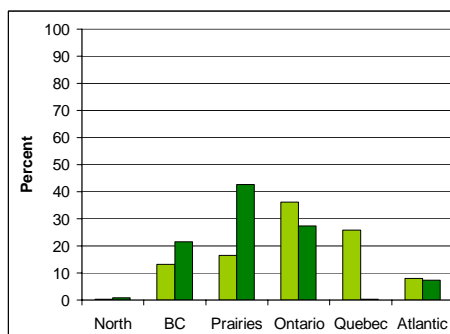


There's money to be found in the nation's smaller cities, and you're most likely to find it in Mr. & Ms. Manager. The residents of these communities spread across Canada tend to be prosperous executives who like their toys: multiple computers, large-screen TV sets and impressive collections of sporting equipment--all are found in their \$200,000 homes. These couples and families enjoy athletic activities like golf, skiing, baseball and exercising at home. And though Mr. & Ms. Manager residents have above-average incomes and education levels, they're not particularly intellectual, tuning their TV sets to hockey games rather than news shows, and preferring hiking to visiting a museum.

Mr. & Ms. Manager has one of the highest rates for dual-income couples in Canada, and their always-on-the-go lifestyle results in a few frayed edges. While they work hard for their healthy \$88,000 average annual household incomes, they long for a respite from their intense 9-to-5 lives. In the sprawl of these mid-sized towns and cities, escape generally means hitting the golf course, visiting friends or simply falling into a living room easy chair to take in lots of televised sports. Hardly the style mavens of wealthier neighbourhoods, Mr. & Ms. Manager residents admit that they're blasé about gardening and home decorating. Keeping up with their jobs and teenagers takes most of their energy.

WHERE THEY LIVE

East St. Paul (north east of Winnipeg), St. François Xavier, Tsawwassen (near White Rock), Chestermere (east of Calgary), St. Albert (northwest of Edmonton), Fort Saskatchewan (northeast of Edmonton), Leduc (south of Edmonton), Delta (Highway 91 area), Squamish (north of Vancouver), Airdrie (north of Calgary), Langley (in Fraser Valley), Marathon, Sarnia, Regina



HOW THEY THINK

Mr. & Ms. Manager is a cluster that is comfortable financially and at ease in its environment. These Canadians are not desperate to show others they've made it: weak on *Joy of Consumption* and *Ostentatious Consumption*, Mr. & Ms. Manager residents would rather spend time with family at home than in a mall, and they don't feel compelled to display their success in front of others. This cluster is not particularly introspective; it is weak on *Spiritual Quest*, *Intuition* and *Personal Creativity*. But these Canadians don't need to be questing for enlightenment in order to live thoughtfully. Their high levels of *Openness Toward Others*, *Equality of the Sexes* and *Equal Relationship with Youth* suggest they are secure in their own autonomy and are willing to treat others as peers. This time-stressed cluster is looking for a break; products and services that free up an hour or grease the wheels of daily life will be welcomed with a grateful sigh.

WHO THEY ARE

Population	Cluster %	Index Canada	Households	Cluster %	Index Canada
Age			Maintainer Age		
0-4	5.14	91	< 25	1.03	29
5-14	16.47	123	25-34	9.69	72
15-24	15.09	113	35-44	27.19	125
25-44	27.64	91	45-54	30.74	147
45-64	28.16	116	55-64	17.28	112
65-74	4.94	69	65-74	9.35	71
75-84	2.11	48	75+	4.72	40
85+	0.45	33	Size		
Mother Tongue			1 person	9.90	38
English	83.97	143	2 people	31.11	95
French	4.40	19	3 people	18.86	116
Non-Official	11.63	66	4+ people	40.13	158
Immigration			Family Status		
Immigrant	13.15	72	Non-family	11.31	38
Arrived < 1961	22.86	139	Couples w/ kids	52.35	155
1961-1970	20.70	151	Couples no kids	28.68	111
1971-1980	25.68	149	Lone parent	7.66	69
1981-1990	19.38	101	Age of Children		
1991-1995	5.77	36	Non-family	11.31	38
> 1996	5.61	32	No children	28.68	111
Visible Minority			< 6	10.03	104
Yes	7.67	57	6-14	23.81	141
Adult Population			15-17	8.90	158
	Cluster %	Index Canada	18-24	13.23	158
Marital Status			25+	4.03	94
Single	26.83	80	Dwellings		
Married	63.63	129	Tenure		
W/D/S	9.54	56	Own	93.36	142
Mode of Transport			Rent	6.58	19
Car	83.38	113	Band	0.06	14
Public Transport	5.11	49	Period of Construction		
Class of Worker			< 1946	2.51	17
Paid	91.90	102	1946-1960	4.96	32
Employed	86.92	101	1961-1970	11.80	74
Self-Employed	11.85	101	1971-1980	31.06	146
Unpaid	0.27	71	1981-1990	32.59	181
Occupation			1991-1995	10.34	135
Primary	1.45	40	> 1996	6.77	95
Blue collar	24.16	82	Type		
Service sector	40.15	103	Single	91.74	160
White collar	34.73	117	Semi	2.66	55
Education			Row	2.02	38
< Grade 9	3.35	32	Duplex	1.38	38
Grade 9-13	25.36	81	Low Rise	1.44	8
Trade	12.98	110	High Rise	0.20	2
College	26.32	117	Mobile	0.46	34
Some University	32.00	134	Average Value		
University Degree	22.41	133		193,671	119

HOW THEY LIVE**Leisure**

golf
skiing
camping
exercising at home
visiting friends and family in Canada

Shopping

\$250+ weekly on groceries
photofinishing from Costco
credit card rewards programs
IKEA
Mark's Work Wearhouse

Media

TV sports
top-40 radio
Homemakers
TV Times
newspaper sports sections

Food/Drink

Mexican dinner kits
yogurt
hard candy
popcorn
casual restaurants

Financial

\$50,000-\$100,000 in securities and savings
stocks
mutual funds
electronic banking packages
\$2,500-\$5,000 yearly to RRSPs

Automotive

\$30,000-\$40,000 on latest vehicle
households with 2+ vehicles
new versus used vehicles
sports cars
Lexus models

Attitudes

"Teenagers should have the same freedom as adults"
"It's not important to me to feel connected to my cultural roots"
"I don't mind seeing men and women who dress and behave alike"
"I've written the editor of a newspaper or magazine"
"I enjoy entertaining"

S3

39 - SIMPLE PLEASURES

Mature middle-income suburban homeowners

Population	573,106 (1.91% of Canada)
Households	235,340 (2.04% of Canada)
Average Household Income	\$50,573
Housing Tenure	Homeowners
Average Dwelling Value	\$115,772
Education	Trade/High School/College
Occupation	Mixed
Ethnic Presence	Low
Sample Social Value	Religiosity

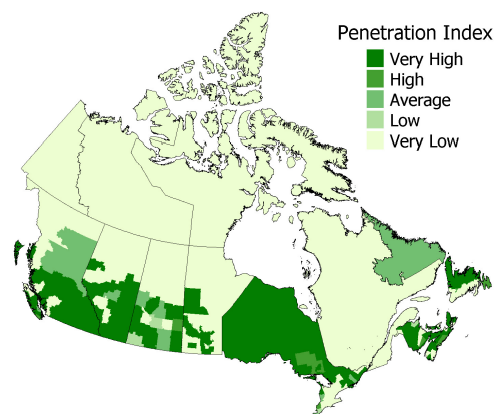
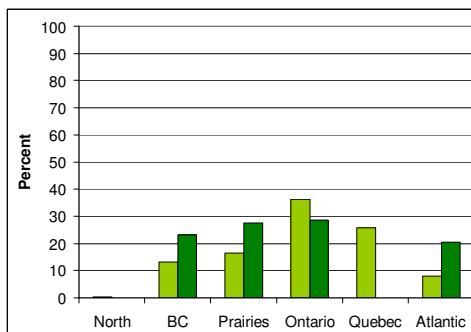


With nearly a third of household maintainers over 65 years old, Simple Pleasures is a rapidly aging cluster, a collection of middle-class singles and couples living in small towns across English Canada. Many residents are high school-educated empty-nesters, and those still working tend to be employed in service sector jobs in retail and health care. But these communities still have a number of Baby Boom residents--42 percent of the households have kids--and Simple Pleasures is known for its active lifestyle. Baseball, snowmobiling and motorcycling are all popular, along with more sedentary pursuits like gardening, baking and making crafts. Given its small city setting and elderly populace, Simple Pleasures fosters traditional values. Residents oppose premarital sex and pornography, and they state that religion is an anchor in their lives.

Simple Pleasures residents travel frequently, though they tend to confine their excursions to visits with friends and relatives and domestic tours in their campers. And, while they go out to eat often, they're most likely to patronize inexpensive doughnut shops, burger joints and casual dining restaurants. Around the house, they pursue hobbies like woodworking and stamp collecting. Simple Pleasures people are also prime TV fans, watching lots of American sitcoms and Canadian comedy shows like "Red Green" and "Air Force." In a rapidly changing world, they move at an unhurried pace in their older homes, used cars and laid-back lifestyles.

WHERE THEY LIVE

Close to towns and cities in the Prairies and Eastern Canada, sprinkled throughout the outer suburbs of Edmonton, Calgary, Regina and Saskatoon, as well as smaller towns such as Red Deer or Moose Jaw. Similarly, in the East they are located in the suburbs of Halifax, Moncton, and St. John, but also in smaller towns such as Truro, Sackville and Charlottetown.



HOW THEY THINK

Simple Pleasures residents see themselves as heavily involved in their religious groups, families and small communities. Among the strongest clusters on *Community Involvement*, *Religiosity* and *Primacy of the Family*, these Canadians find meaning and order in these associations and commitments. The combination of these various memberships and their age causes Simple Pleasures residents to harbour some hostility toward out-groups: they register high levels of *Anomie* and believe in the *Importance of National Superiority*. Simple Pleasures residents are relieved to live in small, homogeneous towns, as these settings provide at least a little protection from what they see as the social ills afflicting society at large: among the weakest clusters on *Flexible Definition of Family* and *Sexual Permissiveness*, these Canadians are alarmed at the erosion of the nuclear family-based social and moral world in which they grew up.

WHO THEY ARE

Population	Cluster %	Index Canada	Households	Cluster %	Index Canada
Age			Maintainer Age		
0-4	5.06	90	< 25	3.31	95
5-14	12.68	94	25-34	11.84	88
15-24	12.53	94	35-44	19.21	88
25-44	26.80	88	45-54	19.18	92
45-64	24.90	103	55-64	14.74	96
65-74	9.41	132	65-74	15.52	118
75-84	6.59	149	75+	16.19	136
85+	2.03	146	Size		
Mother Tongue			1 person	27.08	105
English	87.15	149	2 people	36.61	112
French	5.45	24	3 people	15.17	93
Non-Official	7.39	42	4+ people	21.14	83
Immigration			Family Status		
Immigrant	8.06	44	Non-family	30.04	102
Arrived < 1961	41.49	253	Couples w/ kids	29.54	88
1961-1970	19.88	145	Couples no kids	29.76	115
1971-1980	17.63	103	Lone parent	10.67	97
1981-1990	12.28	64	Age of Children		
1991-1995	4.59	29	Non-family	30.04	102
> 1996	4.19	24	No children	29.76	115
Visible Minority			< 6	8.42	87
Yes	2.60	19	6-14	15.56	92
			15-17	5.74	102
			18-24	7.09	85
			25+	3.39	79
Adult Population	Cluster %	Index Canada		Cluster %	Index Canada
Marital Status			Dwellings		
Single	27.18	81	Tenure		
Married	53.13	107	Own	73.64	112
W/D/S	19.70	116	Rent	26.36	78
Mode of Transport			Band	0.00	0
Car	77.62	105	Period of Construction		
Public Transport	2.38	23	< 1946	15.39	107
Class of Worker			1946-1960	21.69	138
Paid	90.68	101	1961-1970	18.64	118
Employed	87.59	102	1971-1980	21.42	101
Self-Employed	10.56	90	1981-1990	12.42	69
Unpaid	0.28	73	1991-1995	6.01	78
Occupation			> 1996	4.45	63
Primary	2.48	69	Type		
Blue collar	26.00	88	Single	72.18	126
Service sector	42.35	109	Semi	4.40	91
White collar	30.05	101	Row	3.91	73
Education			Duplex	3.66	101
< Grade 9	8.68	83	Low Rise	12.69	70
Grade 9-13	34.96	112	High Rise	0.96	11
Trade	14.94	127	Mobile	1.76	129
College	23.59	105	Average Value		
Some University	17.84	75		115,772	71
University Degree	11.20	66			

HOW THEY LIVE**Leisure**

fishing
boating
community theatre
crafts shows
playing the lottery

Shopping

\$500 or less on men's clothing
yard trimmers
gas station rewards programs
Wal-Mart
Coles Books

Media

TV figure skating
"Just Shoot Me"
"Vicki Gabereau"
New Country radio
Canadian Gardening

Food/Drink

bacon
condensed soup
frozen potato products
ginger ale
doughnut shops

Financial

Sears credit card
savings bonds
mortgages
senior banking packages
telephone banking

Automotive

1-vehicle households
used versus new vehicles
luxury cars
pickups
Buick models

Attitudes

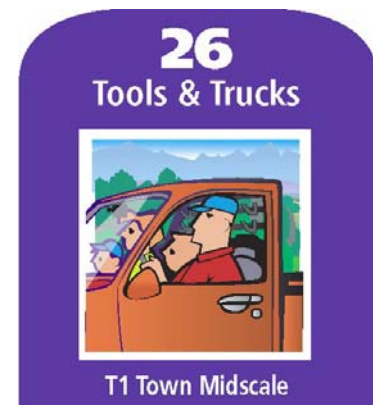
"More of the tax burden should be placed on corporations"
"My religious beliefs are important to me"
"I don't enjoy being extravagant"
"Getting married and having children is the only real way of having a family"
"I try to resist advertisements that tempt me to buy things I don't really want"

T1

26 - TOOLS & TRUCKS

Midscale town families and couples with blue-collar jobs

Population	784,825 (2.62% of Canada)
Households	280,314 (2.42% of Canada)
Average Household Income	\$64,340
Housing Tenure	Homeowners
Average Dwelling Value	\$144,368
Education	High School/Trade
Occupation	Blue Collar & Service Sector
Ethnic Presence	Low
Sample Social Value	Primacy of the family

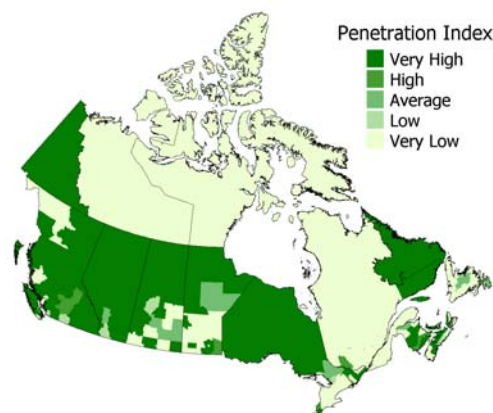
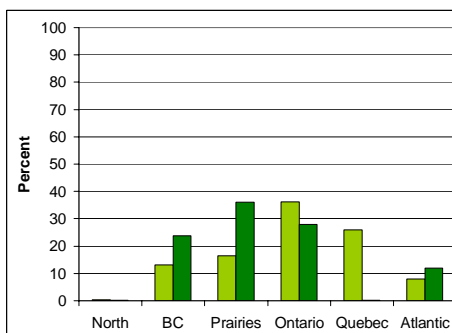


The residents of Tools & Trucks work hard, boasting one of the highest indexes for holding blue-collar jobs in trades, transportation and mining. And when quitting time rolls around, they're eager to return to their small towns and rural communities and relax at home. Their home-centred lifestyles reflect the popularity of woodworking, cooking, sewing and watching TV, especially talk shows and country music programs. These couples and families of teens and tweens also like to vacation in their homes-on-wheels, travelling around Canada in vans and recreational vehicles to go camping, snowmobiling and boating. But they're not known for spoiling their children, and cluster adults assert that good parents enforce strict rules.

Tools & Trucks has only a modest level of educational achievement--just 37 percent of residents have gone to college or university--and there's a working-class atmosphere to this midscale cluster found scattered across English Canada. The men like to hunt, fish, work on their homes and drink beer. While the women tend to work outside the home at high rates, they also enjoy domestic diversions like gardening and knitting. These are relatively conservative Canadians who worry about threats to their livelihood. As they tell researchers, minorities should not be given preferential treatment in hiring even in jobs where they're under-represented.

WHERE THEY LIVE

In farmlands in Essex County near Windsor, Ontario, Langley and Abbotsford, BC, Edmonton, Calgary, Winnipeg and also around most other towns and cities in the Prairies. Surrounding Atlantic cities such as St. John, Moncton, and Halifax, in and near the Ottawa Valley, and around Northern Ontario cities such as Sudbury, Thunder Bay and Timmins.



HOW THEY THINK

Tools & Trucks is a cluster of Canadians who have decided that hard work and playing by the rules are their best shot at keeping their purchase on middle class life. Among the weakest clusters on *Rejection of Authority* and *Equal Relationship With Youth*, these Canadians trust in hierarchy and other strict systems to keep life's chaos (including the prospect of financial difficulty) at bay. Tools & Trucks residents obey their employers doggedly, and expect the same obedience from their kids at the end of the day. Working hard to make ends meet, Tools & Trucks have little time to devote to their inner lives: they register little interest in *Spiritual Quest*, *Intuitive Potential* or *Search for Roots*. Work itself is just a hard-earned paycheck; these Canadians do not seek *Fulfillment Through Work*. Ultimately, though, cluster members find satisfaction in providing for their families. Strong on *Primacy of the Family* and *Community Involvement*, these are salt-of-the-earth types who take their responsibilities to others seriously and work hard to fulfill their duties. Marketers should keep in mind that this cluster's household purchases are likely strictly divided along gender lines: mom at the grocery store, dad at the hardware store, and so on.

WHO THEY ARE

Population	Cluster %	Index Canada	Households	Cluster %	Index Canada
Age			Maintainer Age		
0-4	5.80	103	< 25	2.13	61
5-14	15.54	116	25-34	13.25	98
15-24	13.39	100	35-44	24.81	114
25-44	29.42	97	45-54	23.95	115
45-64	25.88	107	55-64	16.35	106
65-74	6.20	87	65-74	11.57	88
75-84	3.05	69	75+	7.93	67
85+	0.72	52	Size		
Mother Tongue			1 person	16.68	65
English	88.21	151	2 people	35.23	108
French	4.66	21	3 people	17.32	107
Non-Official	7.13	41	4+ people	30.77	122
Immigration			Family Status		
Immigrant	7.32	40	Non-family	18.85	64
Arrived < 1961	35.22	215	Couples w/ kids	41.60	123
1961-1970	21.05	154	Couples no kids	31.34	122
1971-1980	21.34	124	Lone parent	8.21	74
1981-1990	13.32	70	Age of Children		
1991-1995	4.54	29	Non-family	18.85	64
> 1996	4.49	25	No children	31.34	122
Visible Minority			< 6	10.37	108
Yes	1.92	14	6-14	20.45	121
			15-17	7.21	128
			18-24	8.73	104
			25+	3.05	71
Adult Population	Cluster %	Index Canada		Cluster %	Index Canada
Marital Status			Dwellings		
Single	26.71	80	Tenure		
Married	60.07	121	Own	86.84	132
W/D/S	13.21	78	Rent	13.09	39
Mode of Transport			Band	0.06	16
Car	84.98	115	Period of Construction		
Public Transport	1.06	10	< 1946	11.00	77
Class of Worker			1946-1960	12.76	81
Paid	89.07	99	1961-1970	13.76	87
Employed	83.98	98	1971-1980	27.01	127
Self-Employed	14.42	123	1981-1990	17.17	95
Unpaid	0.54	142	1991-1995	9.53	124
Occupation			> 1996	8.76	123
Primary	7.28	204	Type		
Blue collar	41.89	142	Single	88.56	155
Service sector	34.34	88	Semi	1.71	35
White collar	22.72	76	Row	1.60	30
Education			Duplex	1.05	29
< Grade 9	7.19	69	Low Rise	2.64	15
Grade 9-13	38.36	122	High Rise	0.07	1
Trade	17.37	147	Mobile	4.06	298
College	22.57	100	Average Value		
Some University	14.51	61		144,368	89
University Degree	8.86	53			

HOW THEY LIVE**Leisure**

walking
camping
dressmaking/sewing
outdoor shows
pets

Shopping

\$500 or less on women's clothing
\$1-\$50 on books
grocery store rewards programs
Sears catalogues
Mark's Work Wearhouse

Media

Country Music Television
auto racing
"Touched by an Angel"
New Country radio
Canadian Home Workshop

Food/Drink

bacon
condensed soup
stuffing mixes
baking chips
root beer

Financial

credit unions
\$1-\$100 monthly on credit cards
term deposits
have a will
home office banking packages

Automotive

households with 2+ vehicles
purchase versus lease vehicles
oil change/lube done by self
full-sized pickups
GMC models

Attitudes

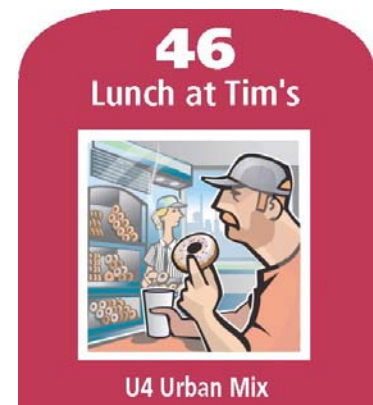
"Young people should be taught to obey authority"
"If I put money aside, it would be mainly used to safeguard my future"
"Material things don't mean that much to me"
"If I could, I wouldn't allow databanks to store data on me"
"It's important to regularly get away from all responsibilities"

U4

46 - LUNCH AT TIM'S

Working-class old and young in industrial towns and cities

Population	451,132 (1.50% of Canada)
Households	185,457 (1.60% of Canada)
Average Household Income	\$45,488
Housing Tenure	Homeowners & Renters
Average Dwelling Value	\$120,283
Education	High School/Grade 9/Trade
Occupation	Blue Collar & Service Sector
Ethnic Presence	Low
Sample Social Value	Aversion to complexity in life

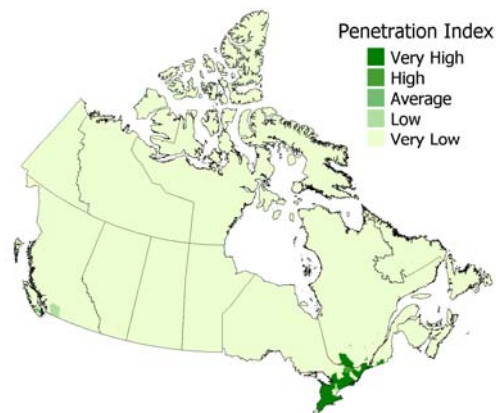
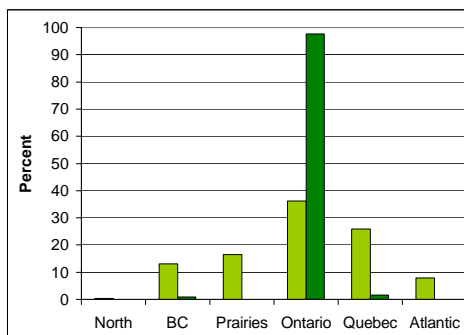


Located in industrial towns and cities across southern Ontario, Lunch at Tim's consists of high school-educated, blue-collar workers living in older homes and small apartment buildings. They're the kind of tight-knit communities where residents like to socialize at local eateries. Few clusters rank higher in the popularity of pizza parlours, Chinese restaurants and doughnut shops. Residents also like to wind down after work by watching TV, playing video games and going snowboarding. They'll occasionally splurge on a visit to a casino, but these working-class folks are more concerned about hanging on to their paycheques than gambling them away. As they put it: "I am willing to work at a boring job as long as the pay is good."

Lunch at Tim's has a split personality: heads of households score above-average for being both under 45 and over 75. The combined effect results in the popularity of both dating services and prescription painkillers, but a weak market for infant toys, league sports and trips to museums or amusement parks. Instead, these Canadians kick back at home with a beer and a hockey game on TV. Among the Lunch at Tim's set, Canadian-made cars, beer and hockey rule.

WHERE THEY LIVE

Deseronto, Aylmer ON, Sutton, Fort Erie, Penetanguishene, Hanover, Collingwood, Smiths Falls, Orillia, Cornwall, Niagara Falls, St. Thomas, Peterborough, St. Catharines, Cambridge, Tillsonburg, Chatham-Kent, Kitchener, Hamilton (near the industrial area), Norfolk, London (east side)



HOW THEY THINK

Lunch at Tim's is a cluster that is struggling both economically and in terms of its ability to handle social change; the *Anomie* found here is a sign that these Canadians are out of step with society's changing values and know it. Lunch at Tim's residents score among the highest for *Aimless*, expressing uncertainty about the purpose of their lives and the direction in which they're heading. It is not surprising that these Canadians register an *Aversion to Complexity in Life* and cling to the idea of the *Importance of National Superiority* to make themselves feel more secure. This patriotism may also spring from their loyalty to Canadian products, which cluster residents have a hand in manufacturing. This cluster's conservative bent comes through in its rejection of *Sexual Permissiveness*, and a certain self-denying toughness is apparent in its claim that *Sensualism* has no appeal. These Canadians are scrambling to stay afloat in a world that is increasingly complex—it's little wonder they don't feel they have time for sensual indulgence beyond an evening watching TV lying in the recliner.

WHO THEY ARE

Population	Cluster %	Index Canada	Households	Cluster %	Index Canada
Age			Maintainer Age		
0-4	6.00	106	< 25	3.67	105
5-14	13.57	101	25-34	16.04	119
15-24	12.59	94	35-44	23.11	106
25-44	30.49	101	45-54	18.47	88
45-64	22.27	92	55-64	13.23	86
65-74	7.84	110	65-74	12.25	93
75-84	5.65	127	75+	13.21	111
85+	1.59	115	Size		
Mother Tongue			1 person	29.17	113
English	86.44	148	2 people	33.30	102
French	3.62	16	3 people	16.03	99
Non-Official	9.94	57	4+ people	21.50	85
Immigration			Family Status		
Immigrant	12.46	68	Non-family	32.39	110
Arrived < 1961	32.84	200	Couples w/ kids	28.99	86
1961-1970	19.52	143	Couples no kids	24.89	97
1971-1980	16.46	96	Lone parent	13.72	124
1981-1990	16.27	85	Age of Children		
1991-1995	7.94	50	Non-family	32.39	110
> 1996	6.99	40	No children	24.89	97
Visible Minority			< 6	9.64	100
Yes	4.00	30	6-14	16.83	100
Adult Population			15-17	5.32	95
	Cluster %	Index Canada	18-24	6.88	82
Marital Status			25+	4.04	95
Single	30.63	91	Dwellings		
Married	47.06	95	Tenure		
W/D/S	22.31	131	Own	66.06	100
Mode of Transport			Rent	33.94	100
Car	75.30	102	Band	0.00	0
Public Transport	3.82	37	Period of Construction		
Class of Worker			< 1946	36.49	254
Paid	91.34	102	1946-1960	24.80	158
Employed	89.72	104	1961-1970	12.60	79
Self-Employed	8.35	71	1971-1980	11.71	55
Unpaid	0.25	64	1981-1990	8.83	49
Occupation			1991-1995	3.30	43
Primary	1.42	40	> 1996	2.28	32
Blue collar	37.63	128	Type		
Service sector	38.31	99	Single	66.64	116
White collar	22.28	75	Semi	5.37	111
Education			Row	4.53	85
< Grade 9	11.22	107	Duplex	4.44	122
Grade 9-13	43.15	138	Low Rise	16.41	90
Trade	12.10	103	High Rise	1.91	21
College	22.68	101	Mobile	0.11	8
Some University	10.85	45	Average Value		
University Degree	6.90	41		120,283	74

HOW THEY LIVE**Leisure**

board games
crafts shows
dating services
coin/stamp collecting
boat shows

Shopping

\$500 or less on women's clothes
\$1-\$50 on books
video games
Jean Machine
Zellers

Media

Golf Channel
sports videos/DVDs
classic/mainstream rock radio
Canadian Hockey Magazine
TV Guide

Food/Drink

frozen main courses
vitamin & mineral supplements
canned pasta
cola
Tim Hortons

Financial

\$10,000-\$25,000 in securities and savings
savings bonds
pre-authorized bill payments
senior banking packages
telephone banking

Automotive

2-vehicle households
used versus new vehicles
minivans
Pontiac models
car maintenance by self

Attitudes

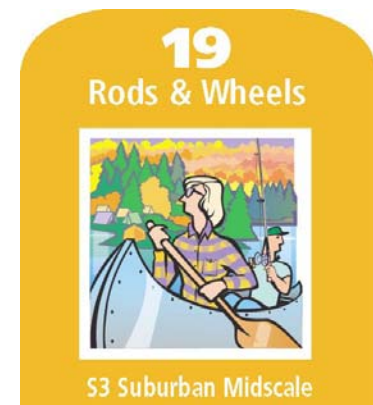
"I prefer to postpone a purchase than to buy on credit"
"I don't learn a great deal from people who are different from me"
"Canadian beer is the best in the world"
"I don't believe that anyone should get better health care just because they can pay for it"
"I look for bargains in second-hand clothing stores"

S3

19 - RODS & WHEELS

Older and outdoorsy upper-middle-class couples and families

Population	511,491 (1.70% of Canada)
Households	187,183 (1.62% of Canada)
Average Household Income	\$66,810
Housing Tenure	Homeowners
Average Dwelling Value	\$170,076
Education	College/High School/Trade
Occupation	Mixed
Ethnic Presence	Low
Sample Social Value	Need for personal achievement

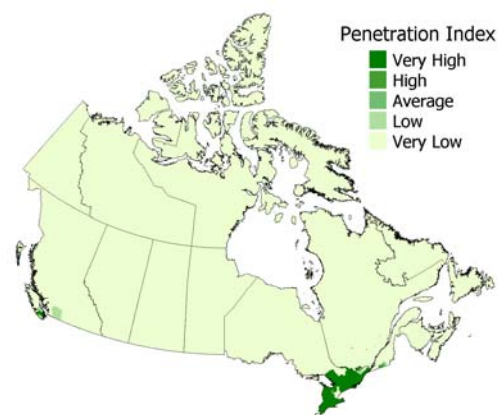
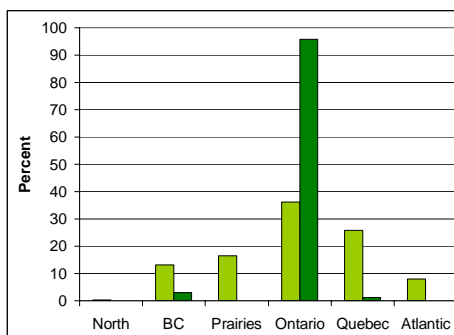


There's a self-reliant streak in Rods & Wheels, a cluster of older, upper-middle-class households that have started to empty-nest. Concentrated in the small towns of Ontario, most households have two wage-earners who typically hold skilled blue-collar jobs or own their own small businesses. They've parlayed high school and trade school diplomas into comfortable, outdoorsy lifestyles, complete with vacation cottages, late-model pickup trucks and plenty of adult toys like motorcycles, snowmobiles and boats. Rods & Wheels residents may not be into the latest fashion or the newest technology, but they're good with their hands and content to enjoy old-fashioned pursuits like hunting, making crafts and gardening. And as their cluster name implies, residents rank at the top as fans of fishing and auto racing.

Look beyond the modest educations and working-class status. The couples and families of Rods & Wheels have financial wherewithal to shop at stores like Jack Fraser and Tabi International, use high-end golf clubs at their local country club and buy fancy riding mowers for navigating their large lawns. In fact, Rods & Wheels residents are twice as likely as the general population to have \$250,000-\$500,000 in securities and savings. Apparently, one of the few indoor sports they pursue with a passion is personal finance.

WHERE THEY LIVE

South Frontenac, Thames Centre, Oro-Medonte, Bracebridge, Rideau Lakes, Kincardine, Cobourg, Penetanguishene, Huntsville, Ingersoll, Kawartha Lakes, Lac-Brome



HOW THEY THINK

Rods & Wheels residents' *Adaptability to Complexity in Life* and *Need for Personal Achievement* have served them well, propelling them to comfortable lifestyles despite their modest levels of education. These Canadians manifest some flexible and inner-directed values as well: strong on *Equality of the Sexes* and *Openness Toward Others* and weak on *Need for Status Recognition* and *Ostentatious Consumption*, Rods & Wheels residents demonstrate a tendency to look for substance and merit in others and an effort to cultivate these things in themselves. In light of these other values *Religiosity* serves as an inner-directed quest for meaning, as opposed to a means of understanding the world in stark good-versus-evil terms. This cluster's belief in the *Importance of National Superiority* is surprising given its other values, but because Rods & Wheels residents have succeeded and prospered in the Canadian environment (despite modest beginnings), their somewhat hard-edged nationalism is perhaps understandable. Marketing that tugs at nationalist heartstrings (à la Tim Horton's) is a good bet for this cluster.

WHO THEY ARE

Population	Cluster %	Index Canada	Households	Cluster %	Index Canada
Age			Maintainer Age		
0-4	4.67	83	< 25	0.87	25
5-14	13.79	103	25-34	8.38	62
15-24	12.27	92	35-44	20.35	94
25-44	25.57	84	45-54	23.26	111
45-64	28.67	118	55-64	18.61	121
65-74	9.13	128	65-74	16.31	124
75-84	4.88	110	75+	12.22	103
85+	1.02	73	Size		
Mother Tongue			1 person	16.31	63
English	89.03	152	2 people	38.92	119
French	2.82	12	3 people	16.13	99
Non-Official	8.16	46	4+ people	28.64	113
Immigration			Family Status		
Immigrant	11.68	64	Non-family	18.00	61
Arrived < 1961	44.34	270	Couples w/ kids	39.23	116
1961-1970	23.26	170	Couples no kids	35.76	139
1971-1980	16.33	95	Lone parent	7.01	63
1981-1990	10.34	54	Age of Children		
1991-1995	3.30	21	Non-family	18.00	61
> 1996	2.43	14	No children	35.76	139
Visible Minority			< 6	8.46	88
Yes	1.78	13	6-14	17.99	107
Adult Population			15-17	6.38	114
	Cluster %	Index Canada	18-24	9.48	113
Marital Status			25+	3.92	92
Single	23.61	70	Dwellings		
Married	62.58	127	Tenure		
W/D/S	13.81	81	Own	90.86	138
Mode of Transport			Rent	9.13	27
Car	86.47	117	Band	0.01	1
Public Transport	1.44	14	Period of Construction		
Class of Worker			< 1946	15.47	108
Paid	88.48	98	1946-1960	15.18	96
Employed	84.36	98	1961-1970	17.83	112
Self-Employed	14.22	121	1971-1980	21.10	99
Unpaid	0.53	138	1981-1990	17.10	95
Occupation			1991-1995	7.03	92
Primary	3.29	92	> 1996	6.24	88
Blue collar	32.27	109	Type		
Service sector	37.47	96	Single	92.08	161
White collar	29.37	99	Semi	1.61	33
Education			Row	1.34	25
< Grade 9	6.54	63	Duplex	0.98	27
Grade 9-13	33.81	108	Low Rise	2.68	15
Trade	13.53	115	High Rise	0.46	5
College	27.31	121	Mobile	0.54	39
Some University	18.82	79	Average Value		
University Degree	13.18	78		170,076	105

HOW THEY LIVE

Leisure	Cluster %	Index Canada
fishing		
crafts		
sporting events		
sportsmen exhibitions		
pets		
Shopping		
riding lawn mowers		
books		
bulk food stores		
department stores		
Jack Fraser		
Media		
Outdoor Life Network		
NASCAR on TV		
"Coronation Street"		
New Country radio		
Internet for real estate information		
Food/Drink		
frozen fish and seafood		
frozen vegetables		
baking mixes		
crackers		
domestic beer		
Financial		
\$250,000-\$500,000 in securities and savings		
Canadian bond funds		
mortgages		
life insurance		
TD Canada Trust		
Automotive		
households with 2+ vehicles		
SUVs		
luxury cars		
service at department store auto centres		
Mercury models		
Attitudes		
"I am good at fixing mechanical things"		
"I've written to a public official"		
"Behaviour problems in school should receive zero tolerance"		
"I disagree that premarital sex improves the later success of a marriage"		
"Being a Canadian is important to me"		