

## **Executive Summary**

### **Top 5 Insights:**

1. Top 5 cities with the most number of programs in order are: Whitby (510), Markham (500), Vaughan (479), Town of Newmarket (479), and Milton (310). Top 5 cities with the fewest number of programs in order are: Uxbridge (53), Aurora (58), Town of East Gwillimbury (65), Municipality of Clarington (77), and Brock (78).
2. The top 3 age groups with the most programs from a grand total of 5120 (in order) were 10-12 (44.33%), 7-9 (41.25%), and 13-15 (40.86%). The most underserved age group was 0-3 with only 11.76% of programs falling within the age band.
3. The top 5 most common general categories were: Sports, Swimming, Art, Fitness, and Education. Top 5 most rare general categories were: Singing, Parent & Tot, Chess, Piano, and Volunteer.
4. The Top 5 cities with the highest average fee per program are: Aurora (\$224.88), Vaughan (\$187.30), Brampton (\$173.74), Markham (\$166.63), and Town of Newmarket (\$148.48). On the other hand, the Top 5 cities with the lowest average fee per program are: Town of Georgina (\$20.45), Milton (\$53.94), Brock (\$59.19), Oshawa (\$73.80), and Burlington (\$74.52). The GTA grand total average fee per program is \$115.88.
5. The Top 5 cities with the highest program average cost per hour are: Oakville (\$49.79), Ajax (\$49.79), Aurora (\$23.78), Town of Newmarket (\$18.24), and Town of Halton Hills (\$18.18). The Top 5 cities with the lowest program average cost per hour are: Town of Georgina (\$4.04), Town of East Gwillimbury (\$4.68), Whitchurch-Stouffville (\$4.78), Brock (\$5.10), and Uxbridge (\$5.88). The GTA grand total average cost per hour is \$13.30.

### **Top 5 Recommendations:**

1. Focus near-term program expansion in municipalities with the lowest number of existing programs, particularly Uxbridge, Aurora, East Gwillimbury, Clarington, and Brock. These cities show significantly lower program saturation compared to high-supply markets such as Whitby, Markham, and Vaughan.
2. Develop and pilot early childhood programs, such as Parent & Tot, movement-based play, and early learning programs, to address the significant gap in offerings for ages 0–3.
3. Introduce programs in rare or niche categories (like Singing, Chess, Piano, and Volunteer-based programs), particularly in cities where sports and swimming dominate existing offerings. These programs should be positioned as specialty or enrichment options.
4. Use the GTA average fee per program (\$115.88) as the primary pricing anchor when designing new programs. Programs launched in higher-cost markets (e.g., Aurora, Vaughan, Brampton, Markham) can be priced modestly above the GTA average, while programs in lower-cost markets (e.g., Georgina, Milton, Brock, Oshawa) should be priced at or below the GTA average to remain competitive and accessible.
5. Use the GTA average cost per hour (\$13.30) as a general guideline when designing new programs. Programs should aim to remain close to this benchmark, with flexibility to offer slightly higher-priced programs in markets that already support higher costs per hour and more affordable options in lower-cost markets.

### **Links:**

- <https://lookerstudio.google.com/s/vK4m1IXFOfw> (Looker Studio dashboard)
- <https://docs.google.com/spreadsheets/d/1HJkjPU7JzRJUPUIMzRa4aqXcPJDNFXEj8wVOiuMyK4U/edit?usp=sharing> (master sheet)