

PUBLIC SPACE VISITOR ORIGIN SUMMARY

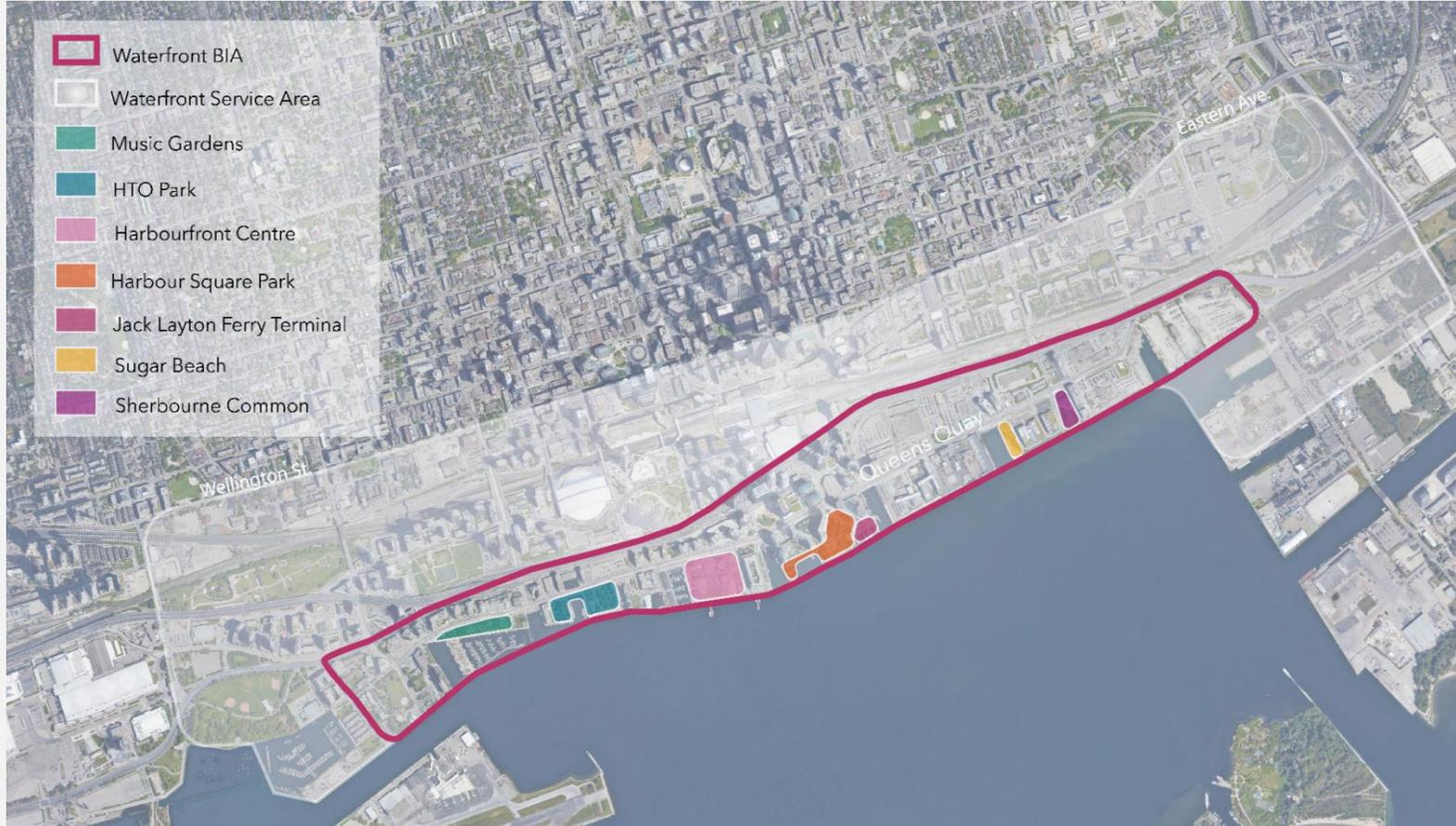
12 months pre and post pandemic.
Where do visitors to waterfront public spaces live?



WATERFRONT
BIA

ABOUT THE DATA

Study objective, data sources, and privacy compliance



The objective of this study was to determine where visitors to the waterfront originate, i.e. where they live.

A visit is counted if a person entered one of the public spaces marked at left, with duplicate visitors to multiple parks on a single day removed from cumulative counts.

All data collected meets privacy compliance guidelines of EU GDPR, California CCPA, and Canadian PIPEDA standards and best practices. Counts were cross-referenced with data from WBIA pedestrian counts, Jack Layton Ferry Terminal and Billy Bishop Toronto City Airport passenger data, Toronto Region Board of Trade traffic data and the Harbourfront Centre visitor counts. Research was completed by GEOmarketing Solutions Group, Inc, Reach Communities Group and Three Sixty Collective.

If you have any questions about this study, please contact oliver@waterfrontbia.com.



Waterfront visitor patterns changed drastically since the COVID-19 pandemic began in March 2020. To understand these changes, data was collected from cellular details for visits to waterfront public spaces.

In looking at 'where visitors come from' for a year before and after the pandemic, the following highlights emerged:

- **Toronto's waterfront is enjoyed by visitors from all over the City of Toronto and the GTA.** In the year prior to the pandemic, 42% of visitors to our public spaces were from outside City of Toronto boundaries (Pg. 4).
- Although down from 18 million visits in the year prior to the pandemic, there were **8 million total visits logged to waterfront public spaces in the first year after the pandemic** (Pg. 4). International visits were down more than 90% during this period (Pg. 4)
- During the pandemic period when people were looking for more local recreation opportunities, **waterfront parks served as a backyard for the people of Toronto, only seeing a moderate decline in visitation.** (Pg. 7).

For additional waterfront visitor information, Queens Quay pedestrian counts are shared after long weekends in the summer and at year-end. www.waterfrontbia.com

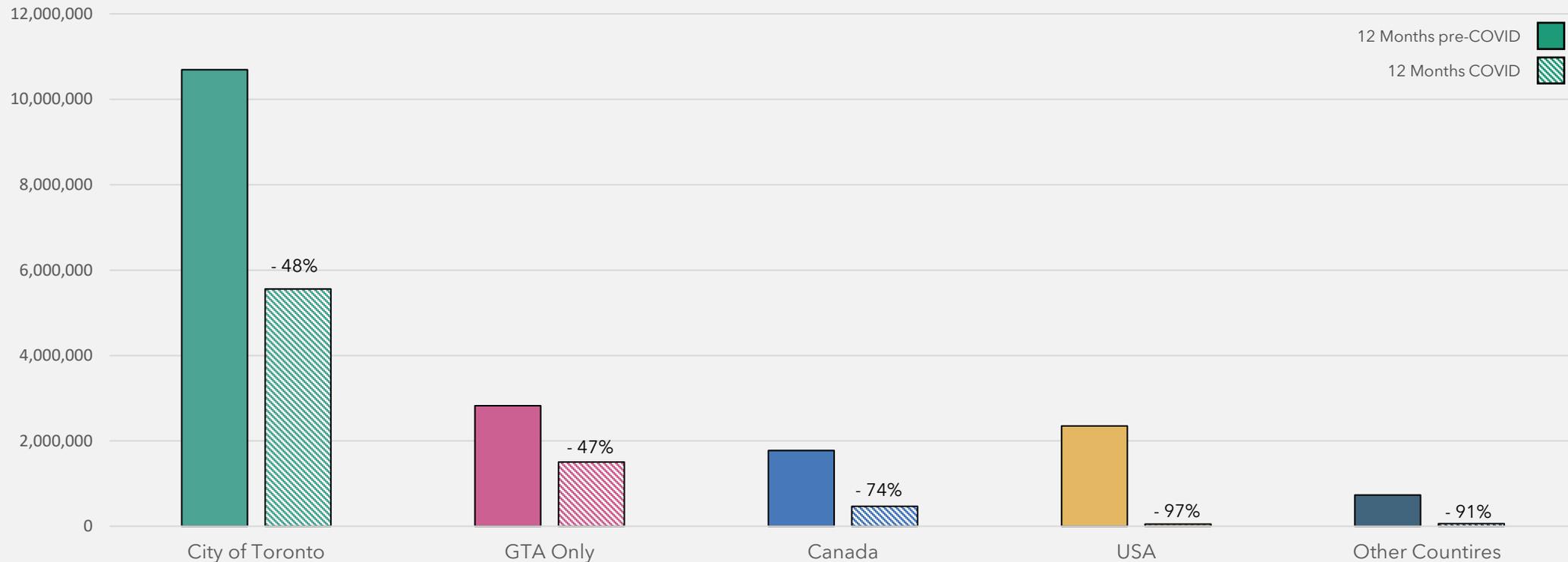


TOTAL VISITS TO WATERFRONT PUBLIC SPACES

Cumulative number of visitations to the waterfront, for the full year pre and post pandemic

12-months Pre COVID
March 1, 2019 - March 1, 2020
18,220,800

12-months COVID
May 1, 2020 - May 1, 2021
7,929,900



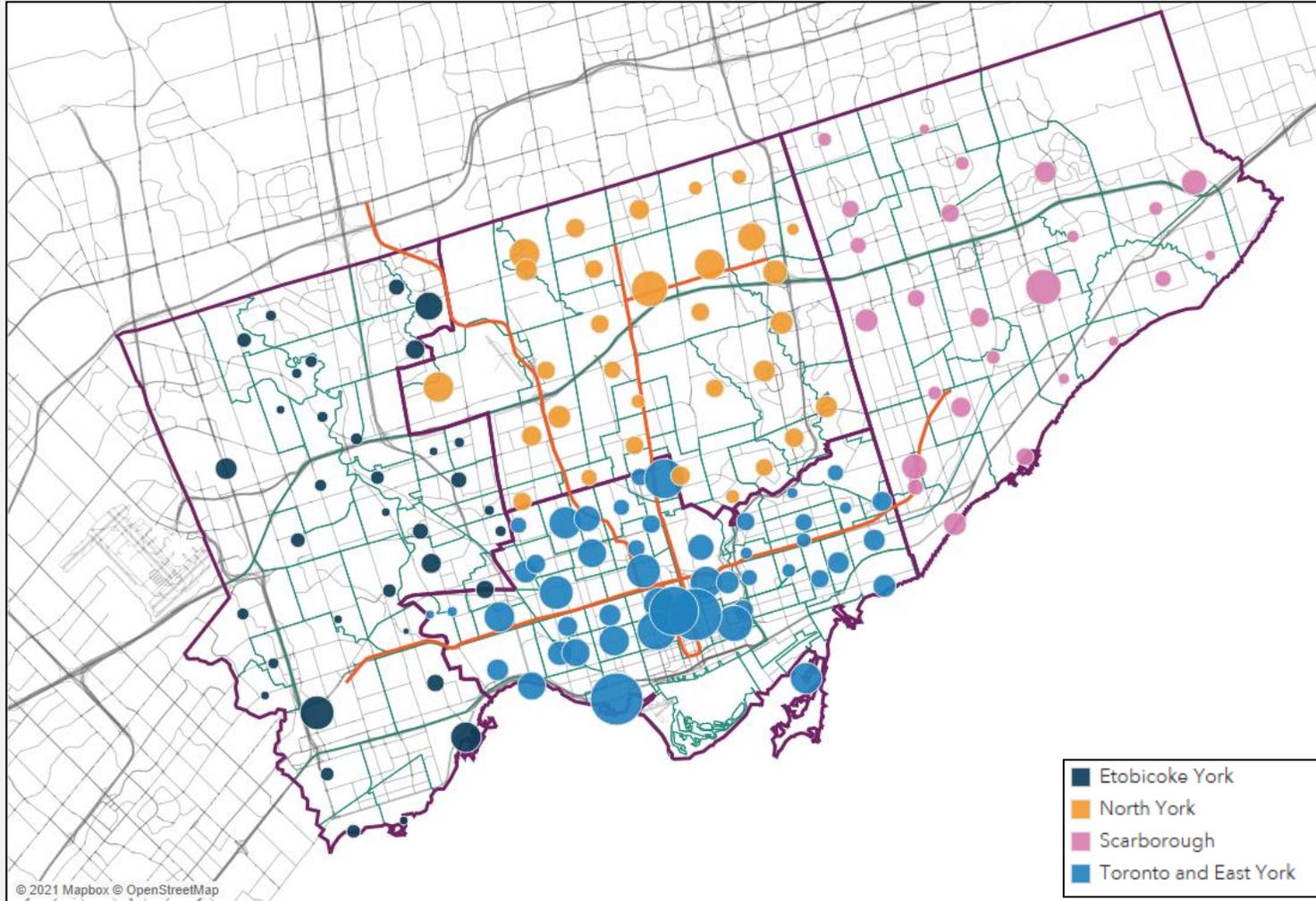
In the 12 months Pre-COVID, International destinations represented 17% of visitations, and 42% of all visitations were from outside of the City of Toronto. During the 12 months following the start of the COVID-19 pandemic, when there were varying degrees of government-mandated stay-at-home orders and lockdowns, 2% of visitations originated from international destinations, and visitation from outside of the City of Toronto decreased to 27% of all visitors.



ORIGIN OF VISITORS, CITY OF TORONTO

Waterfront visitation by City of Toronto Community Council Area and Neighbourhood

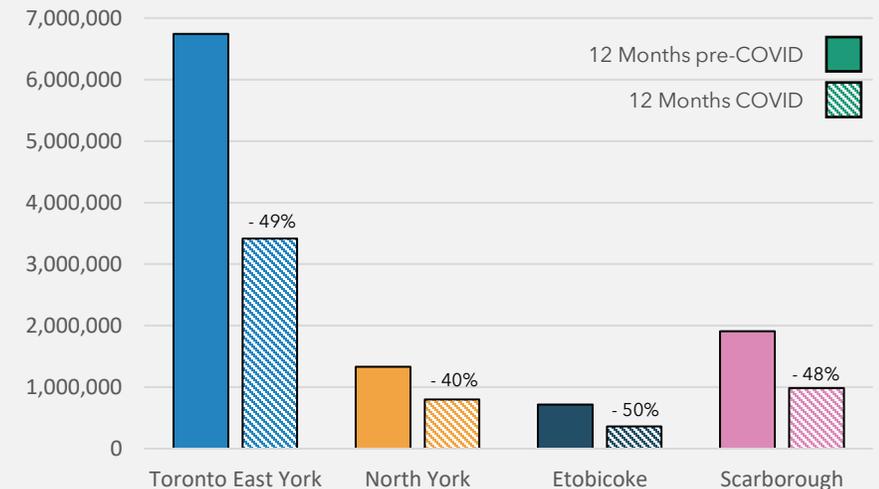
Pre-COVID visitation by Toronto neighbourhood, to waterfront study locations, excluding BIA trade area



For 12 months pre-COVID, there was an estimated **10,695,000** total visitations to the cumulative public space destinations on the waterfront from residents in the City of Toronto. By Community Council Area, visitation was comprised of:

- 63% - Toronto East York (*Metro Toronto*)
- 12% - North York
- 7% - Etobicoke
- 18% - Scarborough

Public Space Visitation from Toronto Community Council Areas

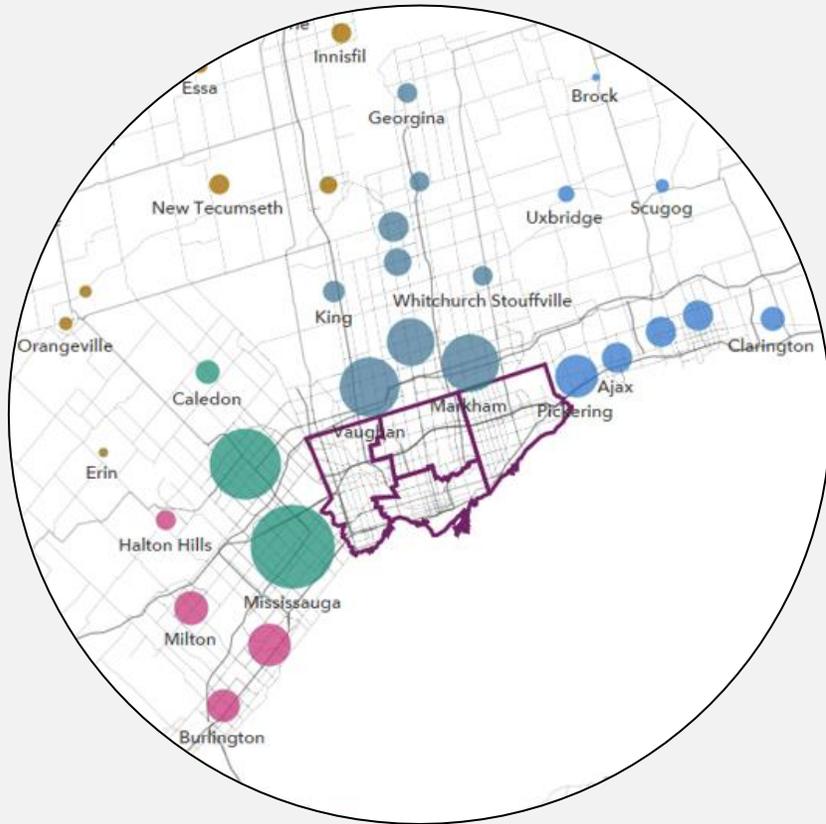


Pre-COVID: 12 months pre-pandemic; March 1, 2019, to March 1, 2020.
COVID: 12 months following pandemic start: May 1, 2020, to May 1, 2021

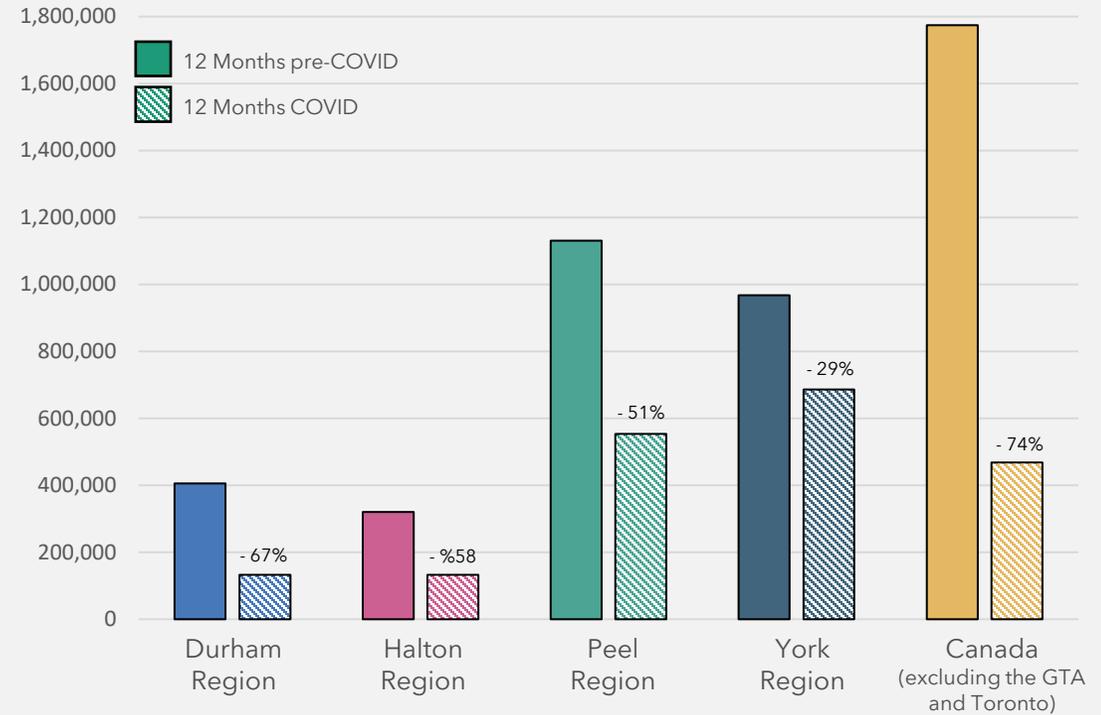


ORIGIN OF VISITORS, GTA

Waterfront visitation from outside of the rest of the Greater Toronto Area, not including City of Toronto residents



Waterfront public space visitations from GTA excluding Toronto, and the rest of Canada



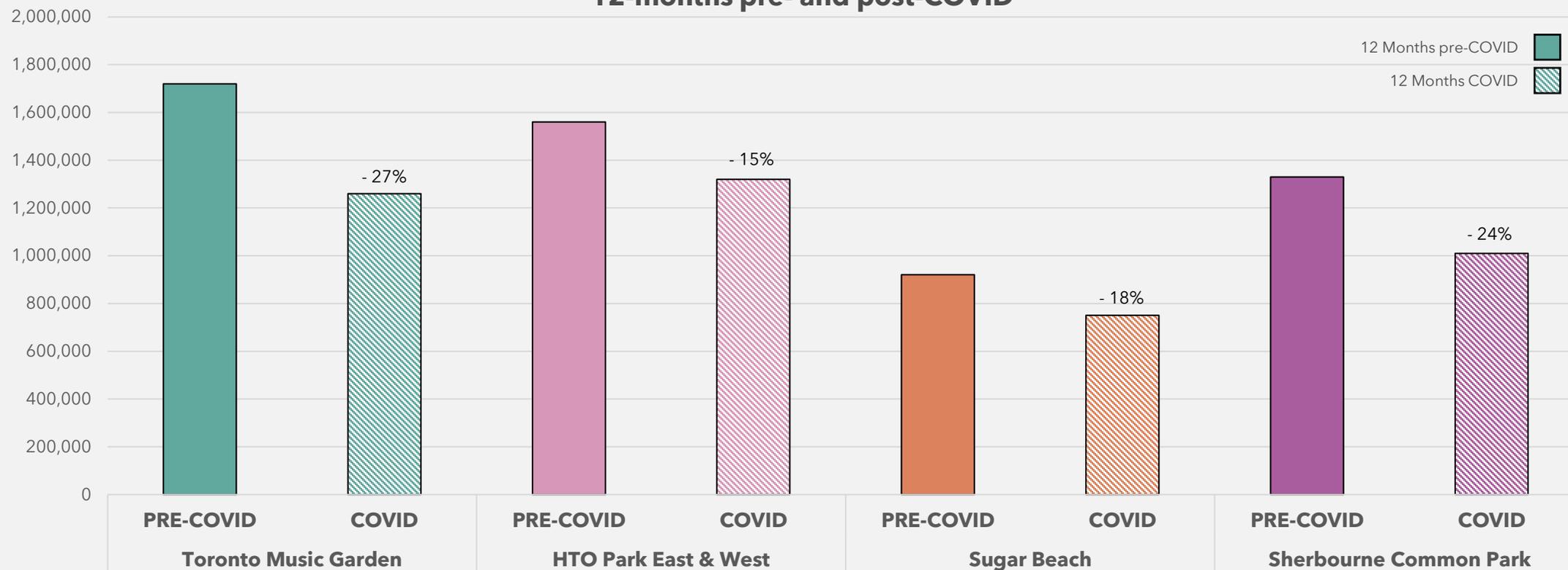
Visitations to the waterfront from the GTA, excluding the City of Toronto, accounted for an estimated 2,823,600 visitations, about 15% of total cumulative visitations, while visitations from Canada excluding the GTA accounted for approximately 1,773,900 visitations, 10% of total visitations. For the 12 months following the start of the pandemic, visitation from the GTA excluding the City of Toronto dropped by 47% as stay-at-home measures came into place, while visitation from Canada excluding the GTA fell by 74%.



PARK VISITATION, PRE AND POST COVID

Visitation to non-programmed public spaces saw a lower drop off in usage

Visitation to recreational waterfront park spaces 12-months pre- and post-COVID



These sample parks, which remained largely open during the 12 months following the start of COVID, show the continued demand for outdoor recreational space during the pandemic, as the decreases in visitation were relatively small. Visitation to these public spaces during this period was primarily comprised of residents living in Toronto East York (52%, 47%, 52%, 51%), however significant visitation also came from North York, Etobicoke and Scarborough cumulatively (26%, 28%, 33%, 24%) and the GTA (16%, 18%, 12%, 30%).

