



WATERFRONT
BIA

WATERFRONT VISITOR SUMMARY 2022

EnviroNics MobileScapes Data for
Waterfront Visitor Demographics, Origins, and Counts

In Partnership with Waterfront Toronto

January 2023
Version 1.1



AREAS OF STUDY

Study objective, data sources, and privacy compliance

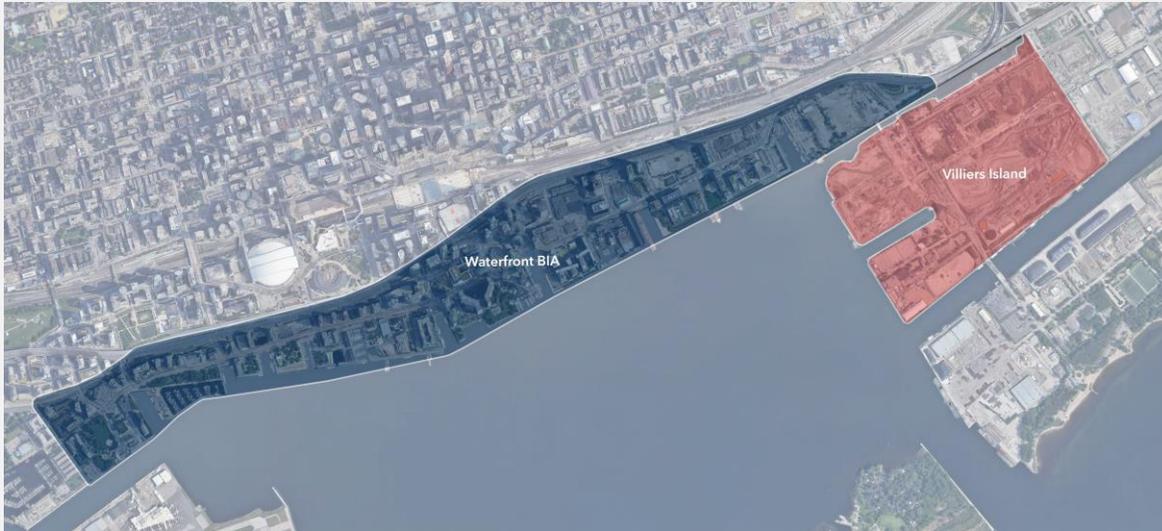


Table of Contents:

02 Areas of Study	08 2022 Unique Visitors by Age
03 Total Unique Visits by Month	09 Visitor Penetration
04 Visitor Origins	10 Cross-Shop Analysis
05 Average Waterfront Visitors	11 Villiers Island
06 2022 Top Six Visitor Profiles	

This study uses Environics MobileScapes Mobile Movement Data to understand visitation to the Waterfront, the differences between visitation to the East, Central, and West areas of the Waterfront BIA area, and visitation to Villiers Island to the east of the Waterfront BIA. These data were procured from Environics by the Waterfront BIA in partnership with Waterfront Toronto.

Environics MobileScapes data is developed from anonymized permission-based cellphone data collected from trusted suppliers using location-enabled apps that are compliant with privacy laws. These data are de-identified by their suppliers, and are modeled by Environics Analytics to understand visitation to the Waterfront. The Environics PRIZM profiles are developed from those data to describe broad groups of people who come to the Waterfront most often, and how they think and behave as consumers.

In this report, all data is for the period of January - October 2022, and is for the Waterfront BIA boundaries, excluding the Toronto Islands, unless otherwise stated.

Definitions:

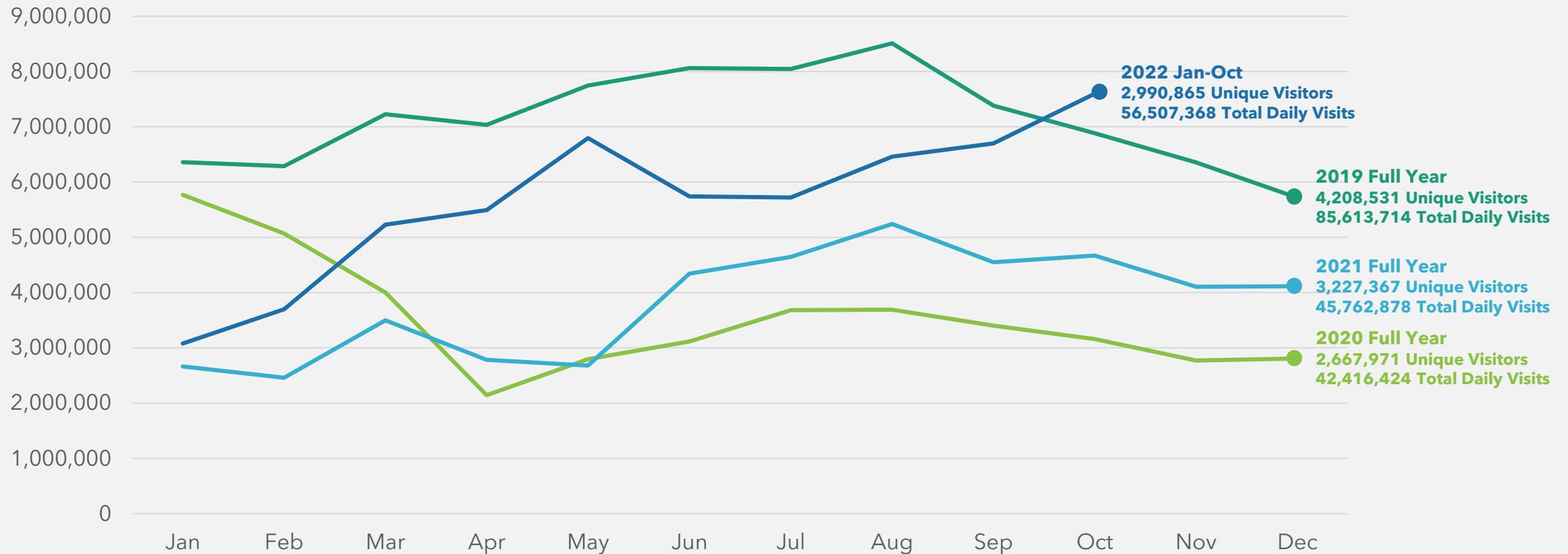
Unique Visitors: The number of distinct visitors who come to the Waterfront from a location in Ontario during the time period, regardless of how often they visit, excluding the people who work or live in the area boundaries.

Daily Visits: The number of distinct visitors who come to the Waterfront from a location in Ontario at least once during the period of a day, regardless of how often they visit, excluding people who work or live in the area boundaries.

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



TOTAL DAILY VISITS BY MONTH 2019-2022



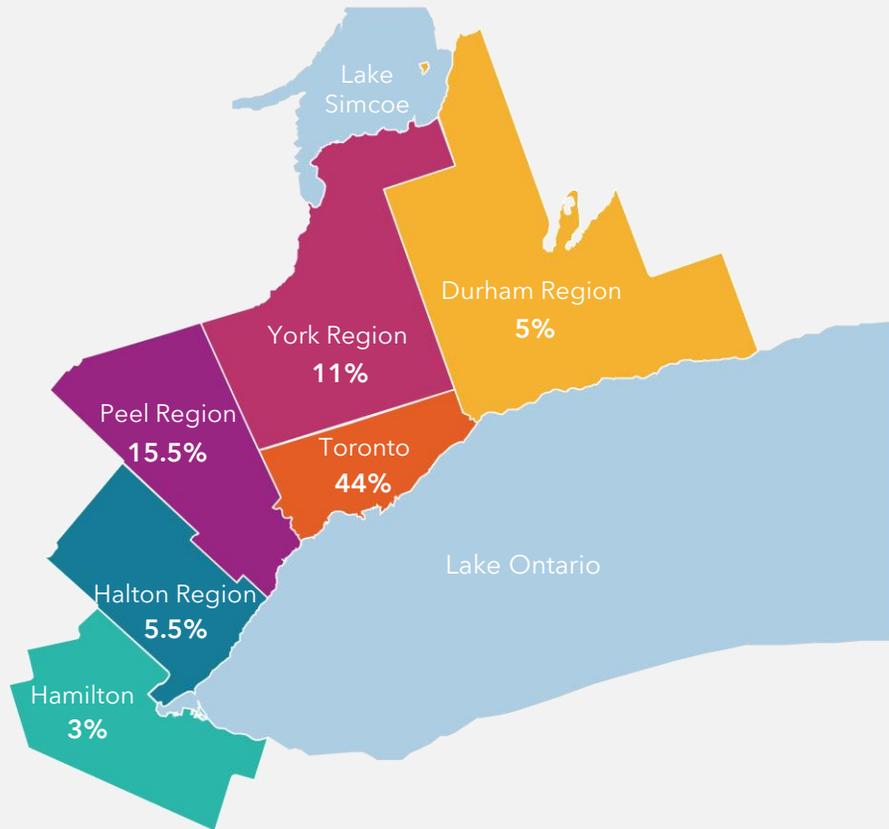
This graph of total daily visits to the Waterfront over the past four years illustrates the impacts of the pandemic starting in early 2020, and the steady climb towards recovery in 2022. In October of 2022, the total daily visits count exceeded those recorded in 2019 for the first time since the start of the pandemic as visitors began to get out more, and as events and festivals such as Nuit Blanche return.



VISITOR ORIGINS – GREATER TORONTO AND HAMILTON AREA (GTHA)

January to October 2022

Unique Visitors from the GTHA

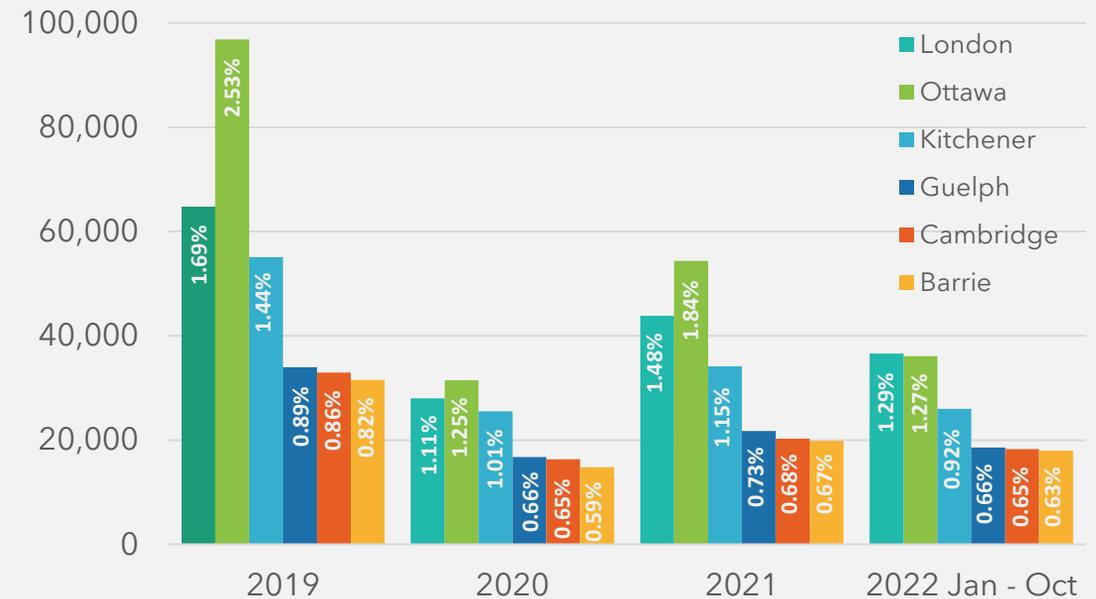


The majority of unique visitors to the Waterfront are from Toronto, making up 44% of the unique visitors to the area, or 1,247,308 total unique visitors during the period. The GTHA however accounted for a cumulative 40% of unique visitors, illustrating the significant draw of the Waterfront from outside of the City's boundaries.

Visitors from outside of the GTHA have been slow to recover from the pandemic impacts, with only a little more than half of visitors coming to the Waterfront from these regions in 2022 as did in 2019.

More than 15,000+ visitors came from each of these six cities from Jan to Oct 2022, making up 5.6% of all visitors to the Waterfront, as compared to 8.23% of all visitors in FY 2019

Unique Visitors from Cities Outside of the GTHA



AVERAGE WATERFRONT VISITORS FROM TORONTO

How they compare to the City's average.

05



55% of visitors to the Waterfront rent, which is 16% more likely as compared to Toronto as a whole.



37% of visitors to the Waterfront have children at home, which is 15% below average for the city.



84% of visitors to the Waterfront live in an apartment or condo building (low and high rise). This is 30% above average for the city.



The household income of visitors to the Waterfront is an average of **\$117,529**, which is 11% lower than average for the city.



16% of visitors to the Waterfront live in a house. This is 55% below the city average.



55% of visitors to the Waterfront have a university certificate, diploma or degree at the bachelors level or above, 13% above the average for the city.



2022 TOP SIX VISITORS AND THEIR PROFILES

For more information on these PRIZM profiles, visit the [Environics PRIZM Website](#)

Eat Play Love



An average of 42 visits per visitor to the Waterfront

\$124,418 Average Household Income

17% of visitors to the Waterfront

Eat Play Love represents very young, singles and couples who live within the urban core. They are the most educated of the social segments, with more than 60% having a university degree. About 90% of them live in high-rise condominiums, and over 60% of them commute to work via public transit, biking, or walking. They value health and fitness, organic nutrition and sexual permissiveness.

191,308 unique visitors

Metro Melting Pot



An average of 22.5 visits per visitor to the Waterfront

\$100,322 Average Household Income

14% of visitors to the Waterfront

Metro Melting Pot segment is dominated by middle-aged, diverse families who are generally living along the urban fringe. More than half of the households contain immigrants, and they are one of the more diverse social segments. They mostly consist of families and lone-parent households with age ranges between 45 and 75 or older living in older single-detached and row houses, semis, and apartment buildings. While some may have young children, others have children in their twenties that contribute to the family's household income.

162,471 unique visitors

Came From Away



An average of 26 visits per visitor to the Waterfront

\$65,982 Average Household Income

14% of visitors to the Waterfront

Came From Away is a social segment home to multi-ethnic, middle-aged urban renters. Most of them are single or lone-parents that live in high-rise apartments in Toronto and other large cities. Their age ranges between 25 and 44 with 60% of them being foreign-born. Their education level range from grade school to university, but most of them hold low-paying jobs in manufacturing, services, and the trades. They still enjoy leisurely activities like going to nightclubs, jazz concerts and billiard halls and families frequent theme parks, aquariums and zoos in their free time.

156,708 unique visitors



2022 TOP SIX VISITORS AND THEIR PROFILES

For more information on these PRIZM profiles, visit the [Environics PRIZM Website](#)

Downtown Verve



An average of 27 visits per visitor to the Waterfront

\$179,524 average household income

11% of visitors to the Waterfront

The *Downtown Verve* segment represents young and middle-aged upscale city dwellers who rent or own in large urban cores where they have quick access to all the services and activities they may need. They are a mix of young and middle-aged singles, couples, and families, and they are mostly first and second-generation Canadians. They are one of the most educated groups and are employed in well-paying management and white-collar positions, and with little to no dependants, they possess high purchasing power. Living in the entertainment district, they frequent bars, restaurants and cinemas and they value health and fitness and ecological well-being.

126,384 unique visitors

Indieville



An average of 24 visits per visitor to the Waterfront

\$114,359 average household income

9% of visitors to the Waterfront

Indieville consists of younger and middle-aged singles and couples who are drawn to big cities. About 40% of them are university educated and twice as likely as average Canadians to hold a master's degree. Even with their high education, they maintain an average income in their white-collar and service-sector jobs in the arts, education and sciences. This segment is considered a transition segment as almost 45% of them have moved in the past five years. They enjoy the latest technology and online shopping for books, music, fashion and groceries

103,677 unique visitors

Multicultural Corners



An average of 22 visits per visitor to the Waterfront

\$132,833 average household income

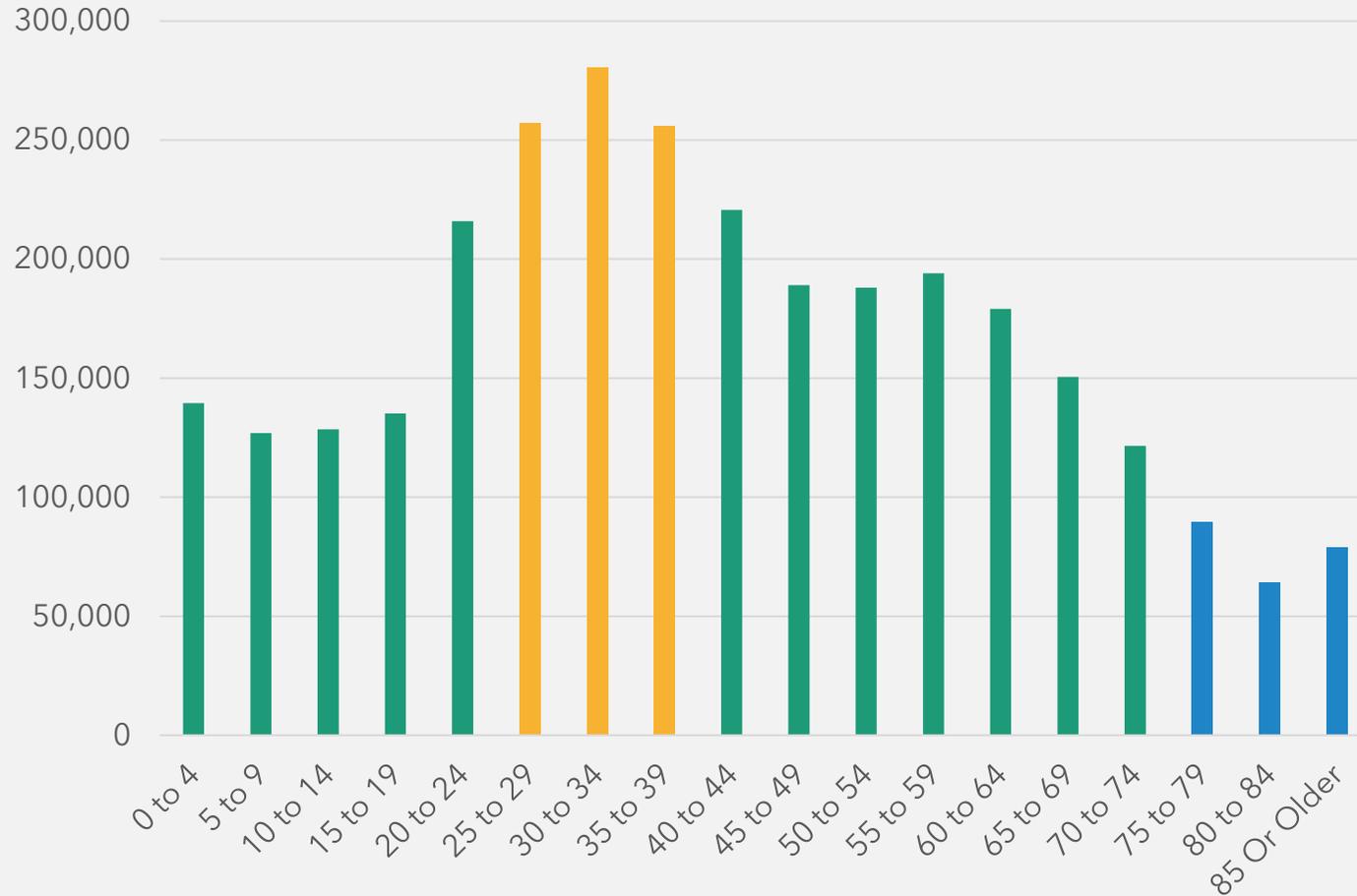
6.5% of visitors to the Waterfront

Multicultural Corners are exceptionally diverse segment, with more than a third of the households containing foreign-born residents. These first- and second-generation Canadians have moved beyond the gateway communities to the urban fringe of the big Canadian cities, and they have secured upper-middle-class incomes with their moderate education levels. With their relatively large families, they mostly reside in row houses and single detached houses that they own. In their free time they enjoy team and aerobic sports and physical activity.

74,020 unique visitors



2022 UNIQUE VISITORS BY AGE



Visitors to the Waterfront tend to be younger than compared with the rest of the City of Toronto Census Metropolitan Area (CMA), with visitors aged 25-29, 30-34, and 35-39 coming to the area 34%, 37% and 22% more than the city average, respectively.

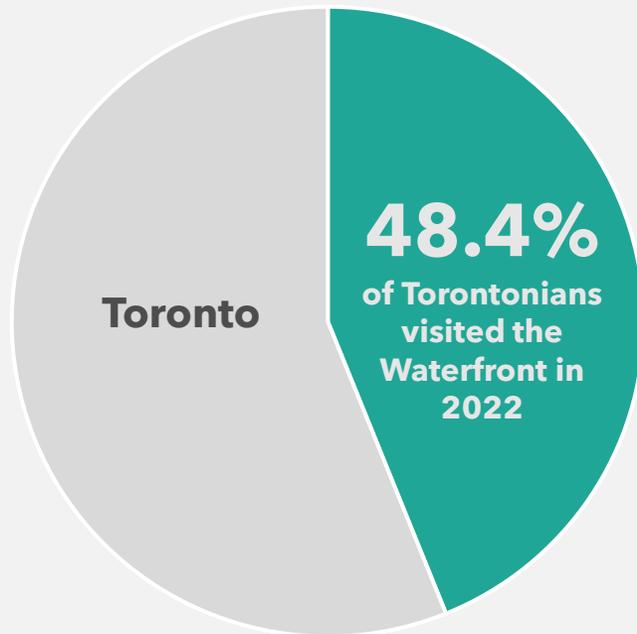
Conversely, seniors aged 70-74, 80-84, and 85+ are 22%, 25%, and 26% less likely than the city average to come to the area. Much of this is likely due to the distance away from the Waterfront where these populations tend to live.



VISITOR PENETRATION

Visitor penetration is the percentage of the sample customer base (such as the total population a city) that is seen within the Waterfront BIA Area within the period of a year. These numbers illustrate how significant the draw to the Waterfront is for populations in the GTHA.

Visitor Penetration by
Census Subdivision Areas within the GTHA
With >50,000 visitors in 2022



	% of population that visited	Unique Visitors
Toronto	48.4%	1,247,308
Mississauga	38.0%	246,342
Brampton	28.5%	172,499
Markham	31.2%	93,602
Vaughan	31.4%	85,959
Hamilton	17.1%	83,931
Oakville	39.9%	71,332
Richmond Hill	31.5%	59,374



CROSS-SHOP ANALYSIS

Where do visitors go to on the Waterfront?



Zone 1 - Western Waterfront

Total unique visitors 2022 Jan to Oct	2,002,081
Exclusively visit Western Waterfront	10%
Also visit <u>Central</u> Waterfront	86%
Also visit <u>Eastern</u> Waterfront	69%

Zone 2 - Central Waterfront

Total unique visitors 2022 Jan to Oct	2,512,493
Exclusively visit Central Waterfront	14%
Also visit <u>Western</u> Waterfront	68%
Also visit <u>Eastern</u> Waterfront	69%

Zone 3 - Eastern Waterfront

Total unique visitors 2022 Jan to Oct	1,964,591
Exclusively visit Eastern Waterfront	8%
Also visit <u>Western</u> Waterfront	70%
Also visit <u>Central</u> Waterfront	88%

This Cross-Shop analysis illustrates if visitors to the Waterfront over the course of a year visit just one zone of the neighbourhood, or if they visit multiple areas across the district. Exclusive Visitors are visitors who only visit one specific zone through the course of the year and not any of the other zones.

Zone 1 - Central Waterfront is the location with the highest number of exclusive visitors, at 14% of visitors spending their time exclusively in that district. Overall, these data illustrate that a high number visitors to the Waterfront will typically go to multiple areas of the district through the course of a year.



VILLIERS ISLAND



When Waterfront Toronto completes the Port Lands Flood Protection project, Villiers Island is expected to be a site of significant visitation growth on the Waterfront, with the development of a new river, destination playground, recreation facilities, businesses and housing. Over the past four years an average of 312,354 visits per month have been observed to Villiers Island.

Villiers Island Daily Visits, 2019 - 2022

