

# Toronto Population Movement Fall 2020



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## INTRODUCING.....

**Environics Analytics MobileScapes Out & About** uses mobile movement data to analyze Canadians moving beyond 500 meters from their homes at different geographical levels, from the Dissemination Area (DA), Census Metropolitan Area (CMA) to the province.

Mobile Movement data are anonymized, permission-based data collected from location-enable apps on mobile devices.

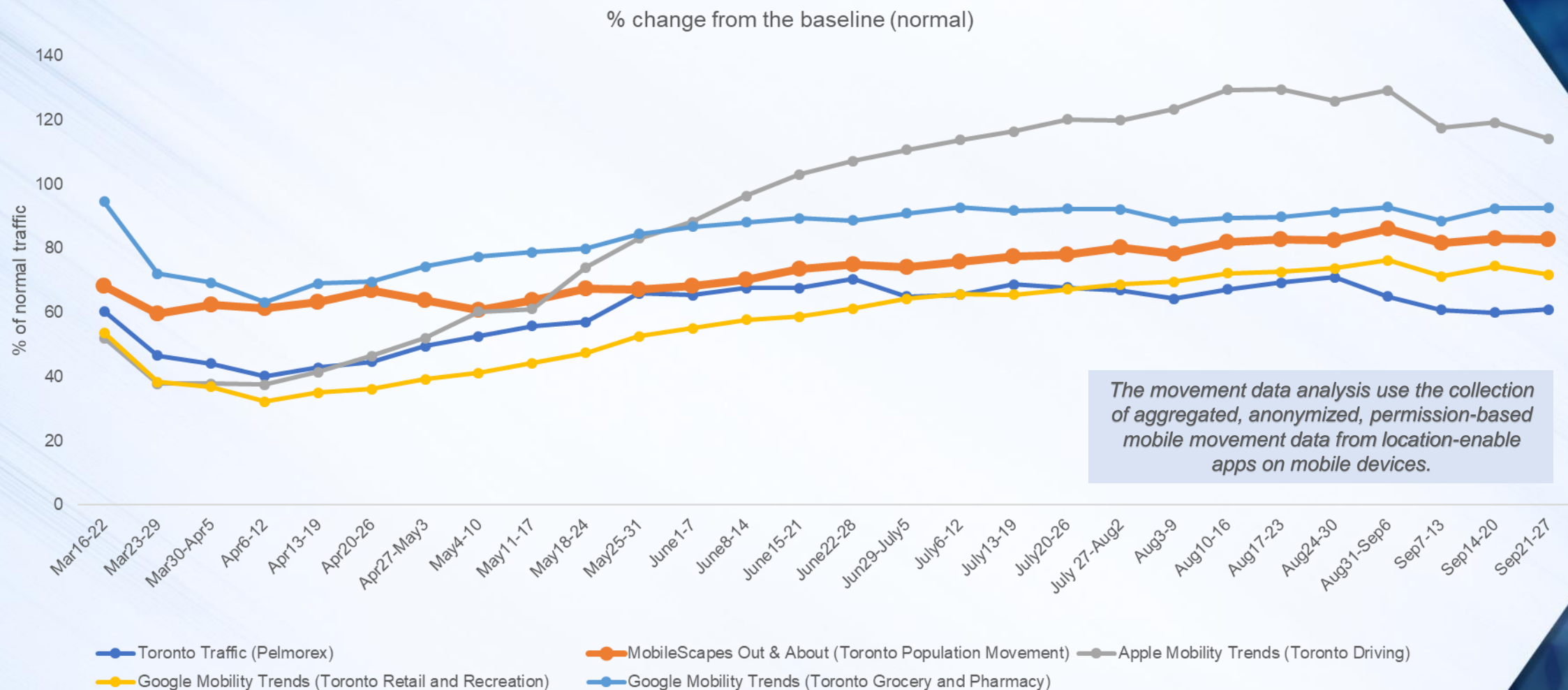
It measures:

- The number people who leave from home
- The daily furthest distance (in km's) that they travel
- The average time (in hours) that they spend outside their home
- The time of day that people are going out

These metrics can be analyzed by month, week, weekday and weekend. The data is weighted to Household Population A15+.

- *Baseline: January 1<sup>st</sup>, 2019 to December 31<sup>st</sup>, 2019*

# MobileScapes Out & About movement data shows a consistent pattern to our Pelmorex data, and to the Apple and Google mobility data.



Pelmorex Location Insights data is taken from January 1<sup>st</sup>, 2020 to September 27<sup>th</sup>, 2020 (Baseline: January 1<sup>st</sup>, 2020 to March 15<sup>th</sup>, 2020)  
 MobileScapes Out & About is taken from March 16<sup>th</sup>, 2020 to September 27<sup>th</sup>, 2020 (Baseline: March 11<sup>th</sup>, 2019 to September 22<sup>nd</sup>, 2020)  
 Apple Mobility Data is taken from March 1<sup>st</sup>, 2020 to September 27<sup>th</sup>, 2020 (Baseline: January 13<sup>th</sup>, 2020)  
 Google Mobility Data is taken from March 1<sup>st</sup>, 2020 to September 27<sup>th</sup>, 2020 (Baseline: January 3<sup>rd</sup>, 2020 to February 3<sup>rd</sup>, 2020)

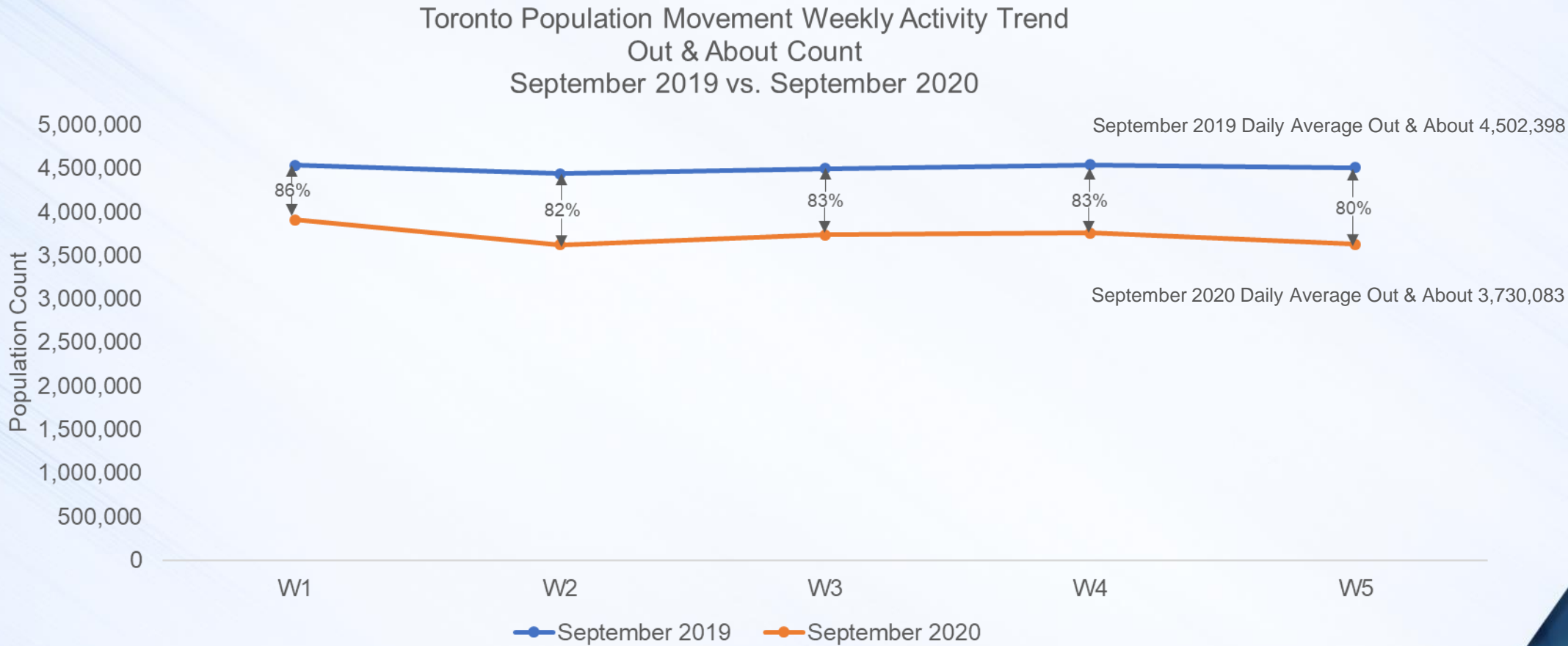
\*The information presented here is anonymous, aggregated, and permission-based GPS location data. At this time, the data is intended to be used for anecdotal purposes only. Readers are to be aware that this data only looks at those who have travelled during the months of January 1<sup>st</sup>, 2020 to September 27<sup>th</sup>, 2020



# Highlights

- Out-of-Home is a mass reach medium – more than 80% of the market population today is out and about everyday
- Distances travelled and hours spent outside the home are currently reduced, but frequency of local trips may have increased
- All ages and incomes are out and about
- More than 3.7 million Torontonians were out and about in September
- The “9 to 5” weekly work day is still true
- Activity after 6pm this September almost equaled the same timeframe last year.
- “Active TO” on the weekends was a success this year
- Both Suburban and Urban areas are active

**Numbers** – On average, over 3.7 million Torontonians were out & about in September 2020, 83% of the total for the same month last year.

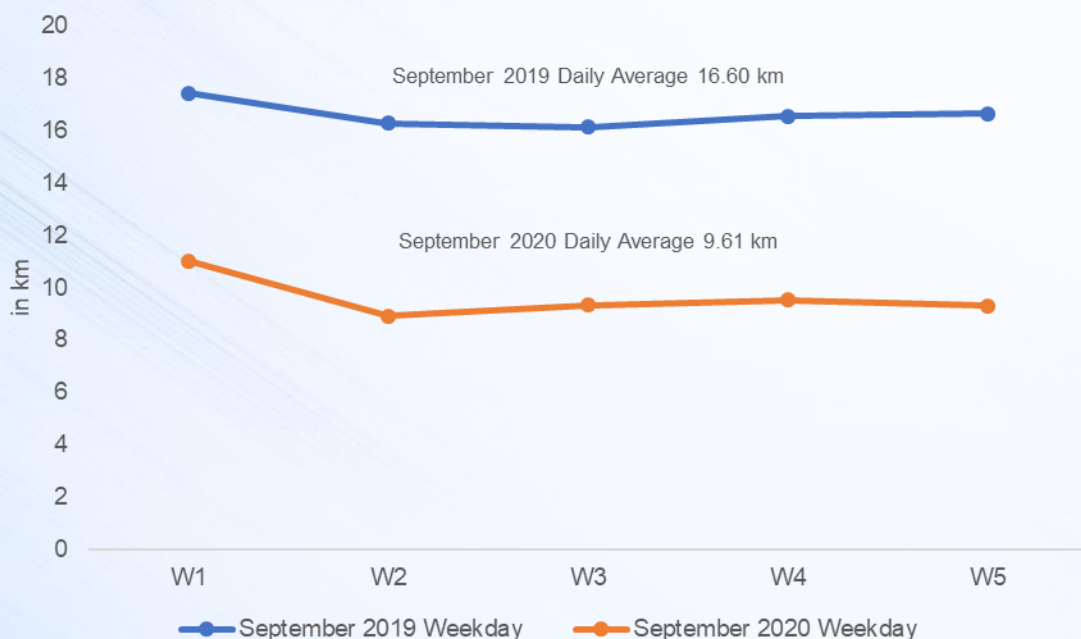


**Distances Travelled** – The daily commute has temporarily changed. Statistics Canada reported last Spring that 39%<sup>1</sup> of people were working from home. And we have all been requested to keep our travels to essential tasks. In September, we travelled 58% of the average daily distance during the weekday and 64% of the average daily distance during the weekend compared to year ago.

**58%**

of the daily weekday average in September 2019

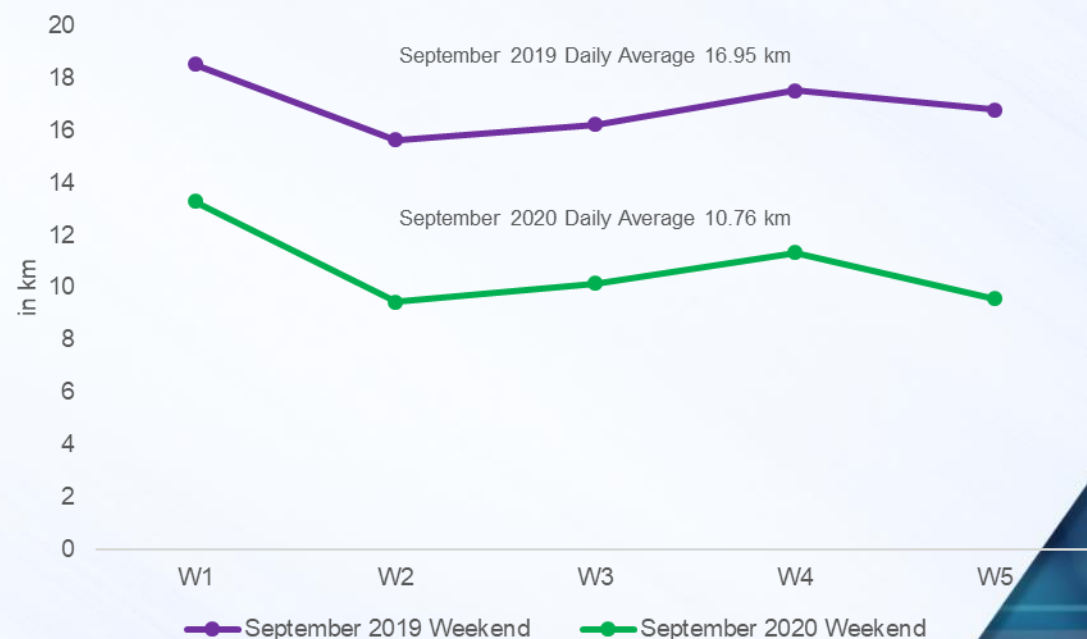
Toronto Population Movement Activity Trend  
Furthest distance travelled away from home in km  
September 2019 vs. September 2020  
(Weekday)



**64%**

of the daily weekend average in September 2019

Toronto Population Movement Activity Trend  
Furthest distance travelled away from home in km  
September 2019 vs. September 2020  
(Weekend)



EnviroNics Analytics MobileScapes Out & About Activity Trend (September 2019 vs. September 2020)

2019 = August 31<sup>st</sup>, 2019 to October 4<sup>th</sup>, 2019

2020 = August 26<sup>th</sup>, 2020 to September 29<sup>th</sup>, 2020

<sup>1</sup>Running the economy remotely: Potential for working from home during and after COVID-19\*, <https://www150.statcan.gc.ca/n1/pub/45-28-0001/2020001/article/00026-eng.htm>, May 28<sup>th</sup>, 2020

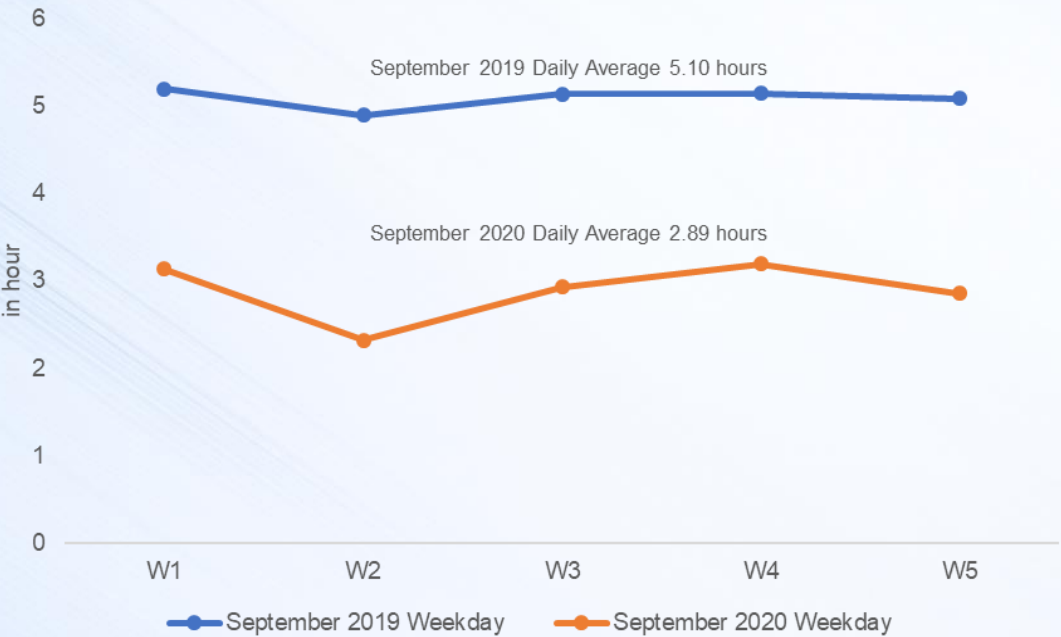
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**Time Away From Home** – The average daily time spent outside of the home in September was 57% during the weekday and 62% during the weekend compared to year ago.

57%

of the daily weekday average in September 2019

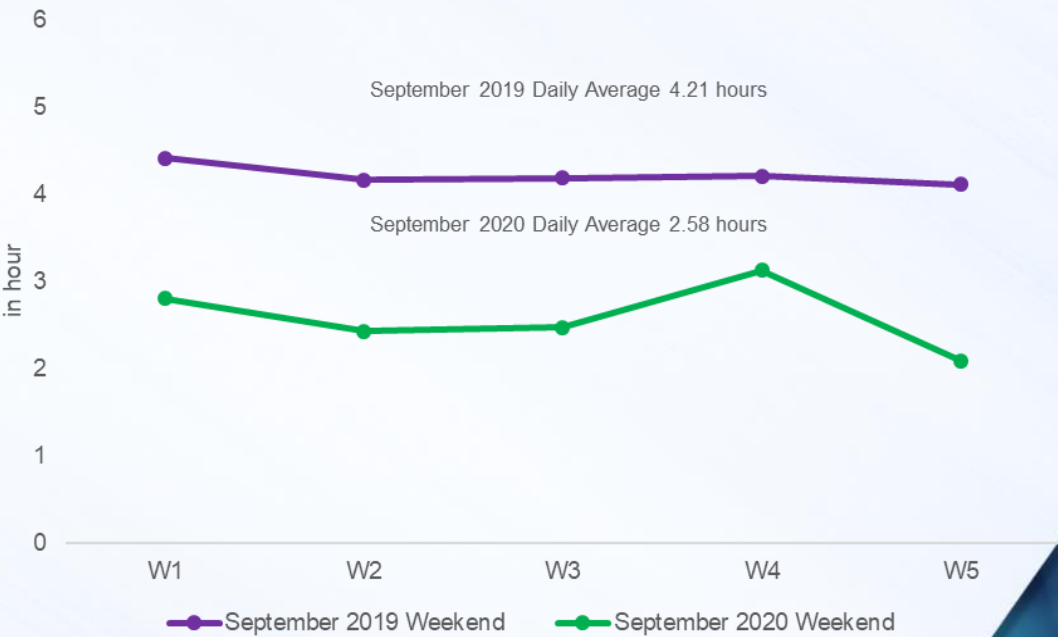
Toronto Population Movement Weekly Activity Trend  
Time spent away from home in hour  
September 2019 vs. September 2020  
(Weekday)



62%

of the daily weekend average in September 2019

Toronto Population Movement Weekly Activity Trend  
Time spent away from home in hour  
September 2019 vs. September 2020  
(Weekend)



Environics Analytics MobileScapes Out & About Activity Trend (September 2019 vs. September 2020)  
2019 = August 31<sup>st</sup>, 2019 to October 4<sup>th</sup>, 2019  
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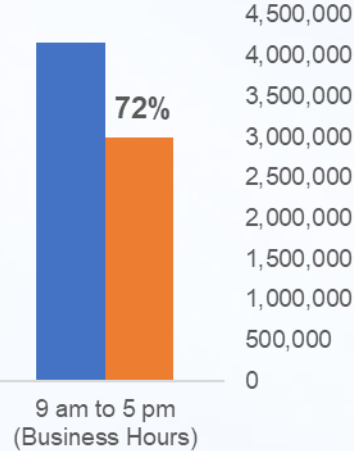
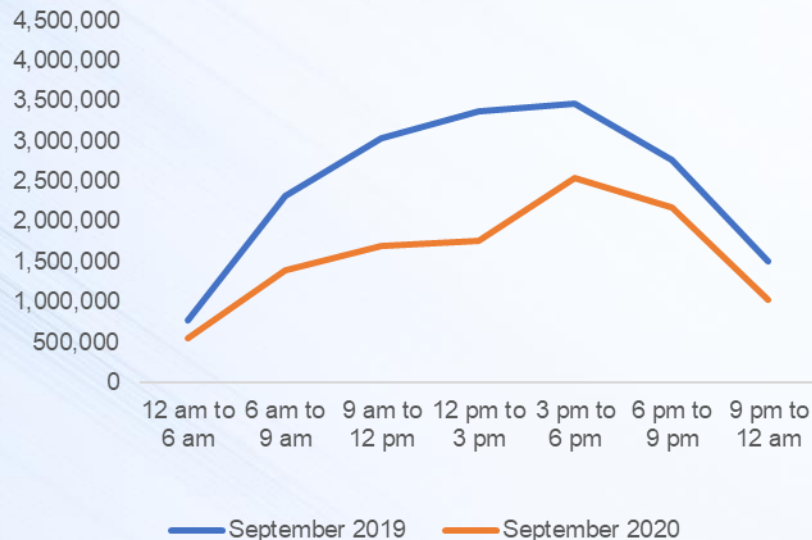




## 2019 and 2020 time away from home patterns are similar:

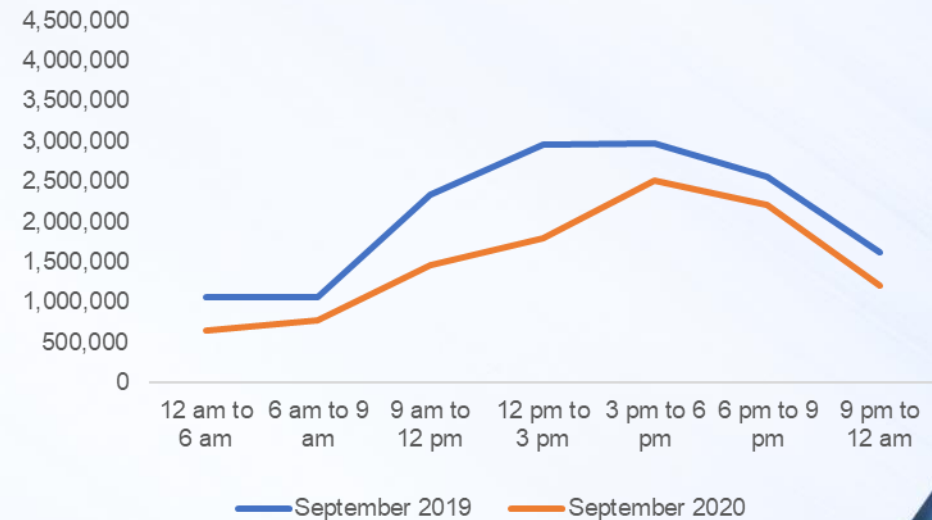
- Both during the week and on weekends, the number of people out & about from 6pm onward was almost the same this September compared to last year.
- The “9 to 5” workday is 72% of what it was a year ago. People are traveling to physical work locations; going to school; running errands during the day. We are out of our homes everyday.

Toronto Population Movement Activity Trend  
Out & About Count  
September 2019 vs. September 2020  
(Weekday by daypart)



■ September 2019  
■ September 2020

Toronto Population Movement Activity Trend  
Out & About Count  
September 2019 vs. September 2020  
(Weekend by daypart)

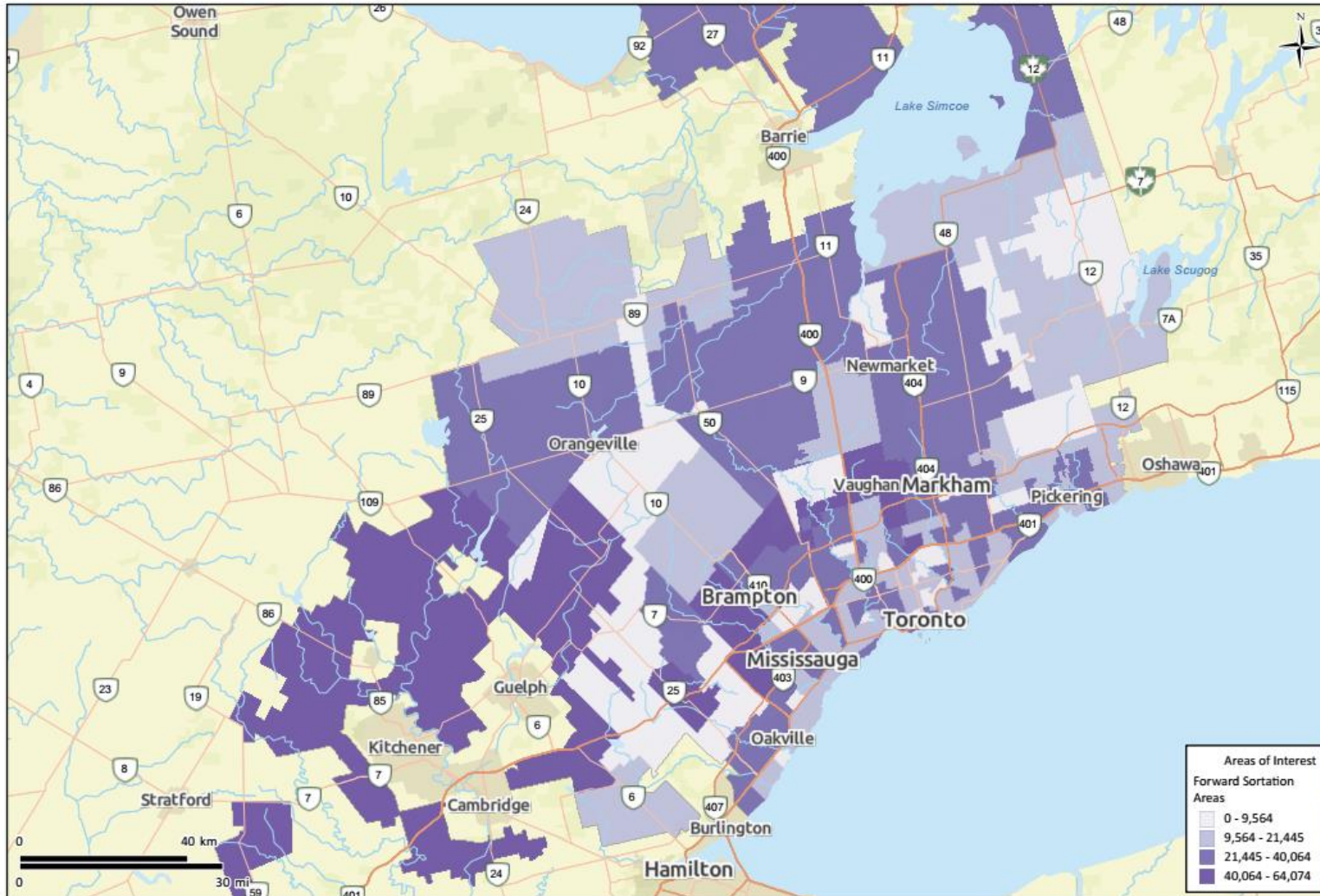


— September 2019 — September 2020



2020- September- Total Month- Out & About  
Toronto, ON (Count)

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Variable Description: 2020- September- Total Month- Out & About | About Page: <https://en.enviroanalytics.ca/Envision/About/1/2020>  
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Additional Sources: Province of Ontario, Esri, HERE, Garmin, FAD, MET/NASA, USGS, EPA, NPS, NRCan, Parks Canada, Powered By ESRI  
Disclaimer: Scale bar is for reference only.

Throughout the Toronto CMA, people are on the move. Suburban areas do see more movement – commuting to work, going to school, running errands, kids’ activities – but the Toronto core is seeing also significant movement.

How to read:

Darker the colour means more people are out & about

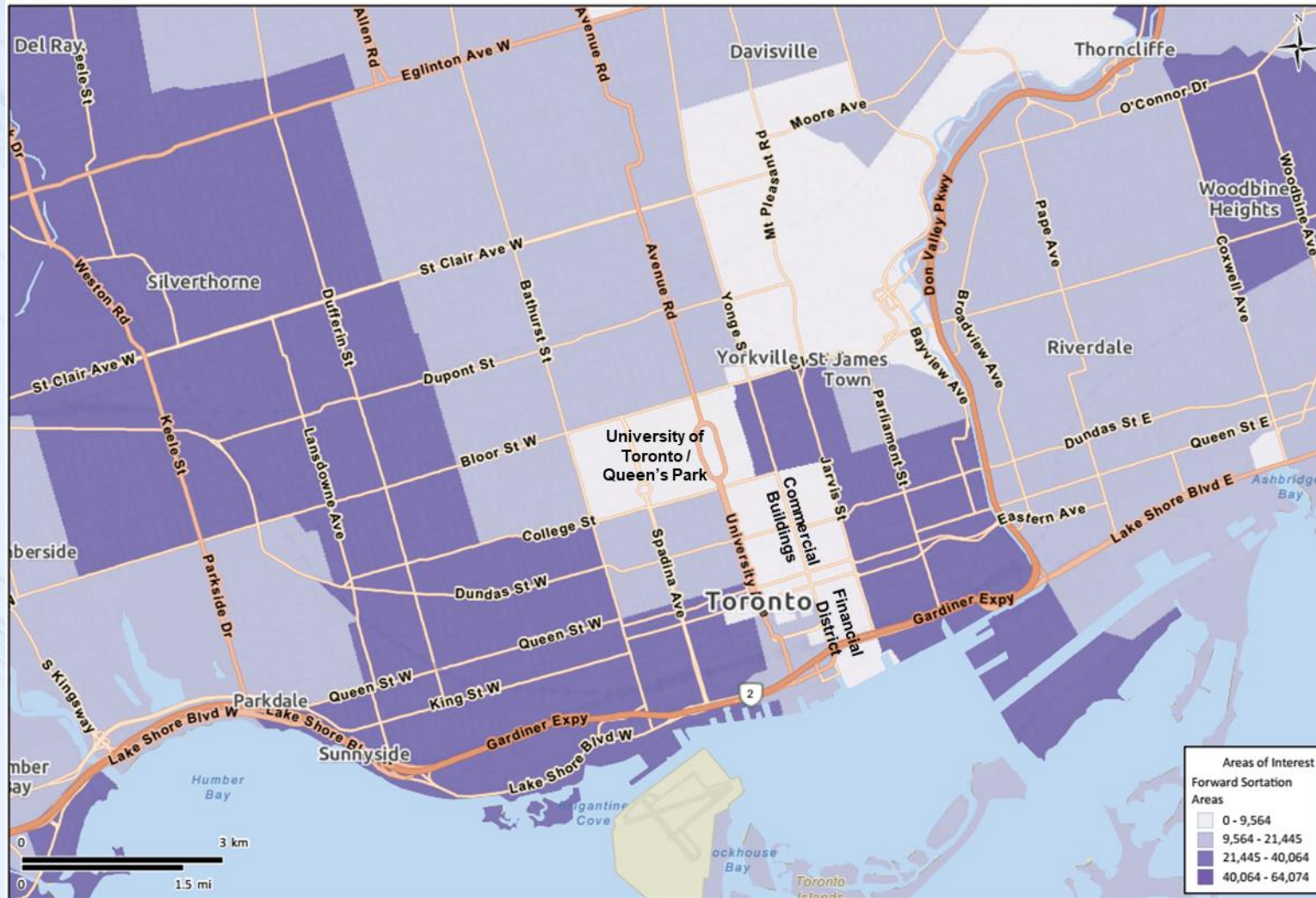
Lighter the colour means less people are out & about

Whiter areas have minimal or no population in them (eg industrial, offices, greenspace)



2020- September- Total Month- Out & About  
Toronto, ON (Count)

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Variable Description: 2020- September- Total Month- Out & About | About Page: <https://en.enviro-nicsanalytics.ca/Envision/About/1/2020>  
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Additional Sources: City of Toronto, Province of Ontario, Esri, HERE, Garmin, MIETI/NASA, USGS, EPA, NPS, USDA, NRCan, Parks Canada, Powered By ESRI  
Disclaimer: Scale bar is for reference only.

Torontonians continue to travel into and around the downtown core. High density neighbourhoods such as Liberty Village, Corktown, Queen West, Entertainment district are all busy, especially after 6pm and on weekends.

How to read:

Darker the colour means more people are out & about

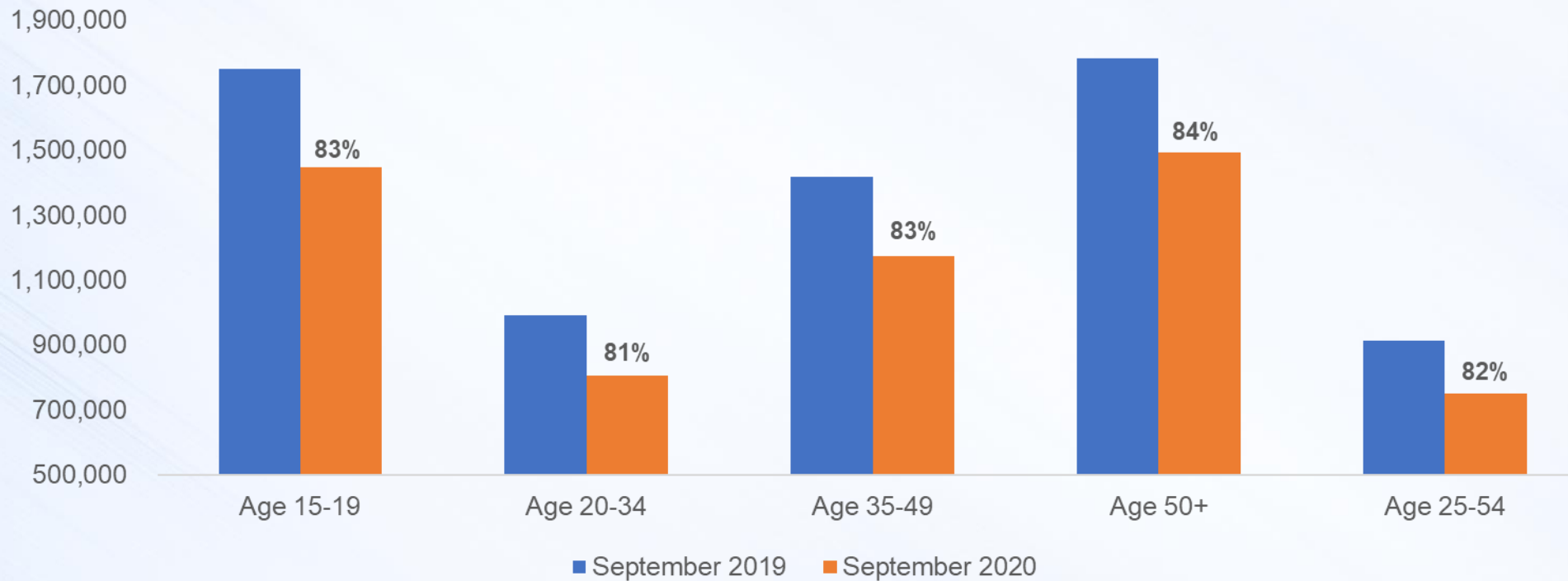
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# Population Movement Trends of **Torontonians** by Age

Toronto Average = 83%

Toronto Population Movement Activity Trend  
Out & About Count  
September 2019 vs. September 2020  
(by Age)

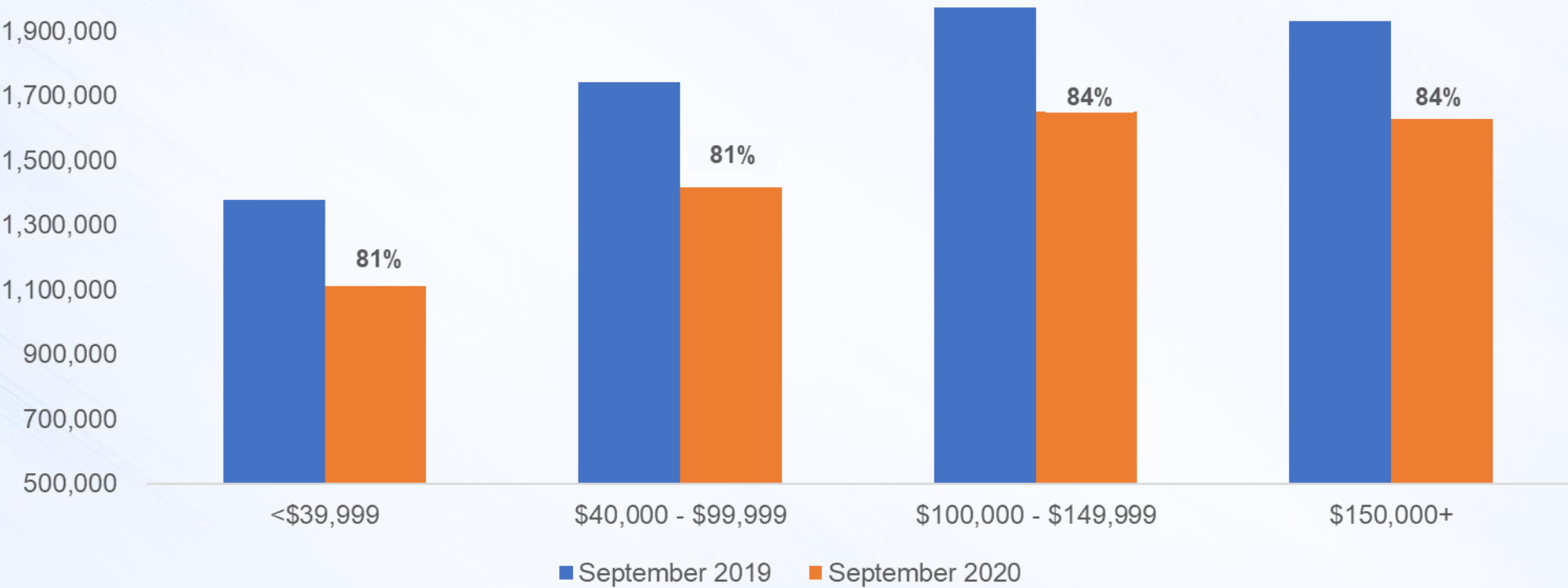




# Population Movement Trends of **Torontonians** by Household Income

Toronto Average = 83%

Toronto Population Movement Activity Trend  
Out & About Count  
September 2019 vs. September 2020  
(by Household Income)



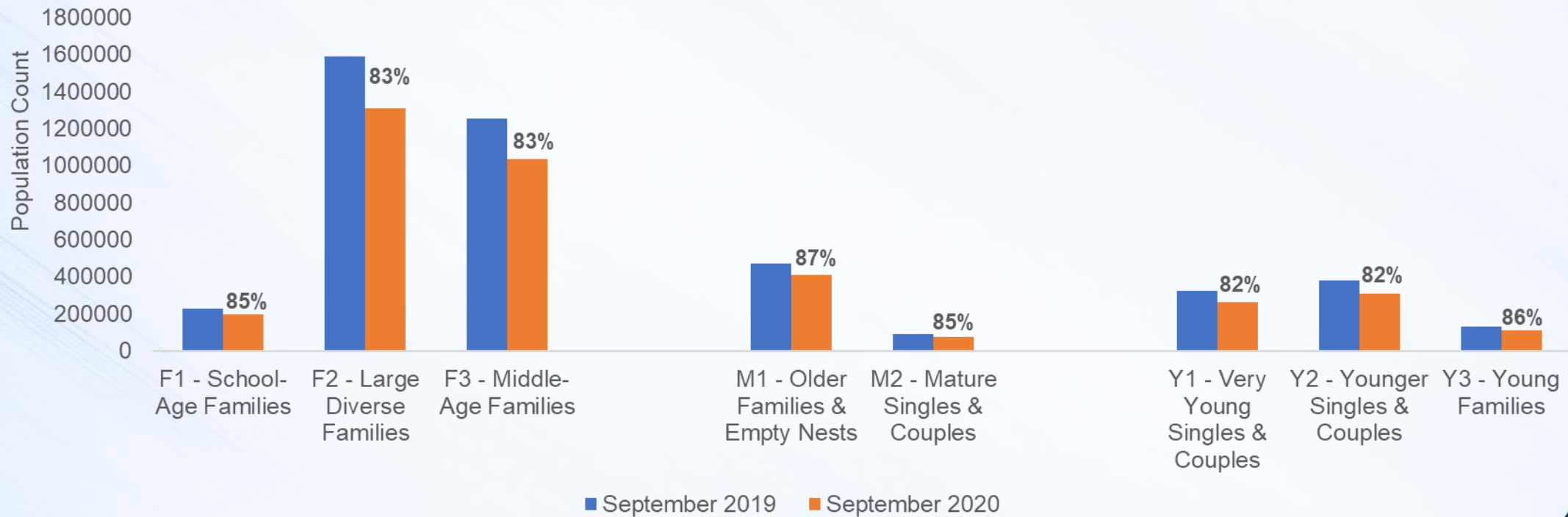
EnviroNics Analytics MobileScapes Out & About Activity Trend (September 2020 vs. September 2019)  
2019 = August 31st, 2019 to October 4th, 2019  
2020 = August 26th, 2020 to September 29th, 2020  
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# Population Movement Trends of Torontonians by Life Stage

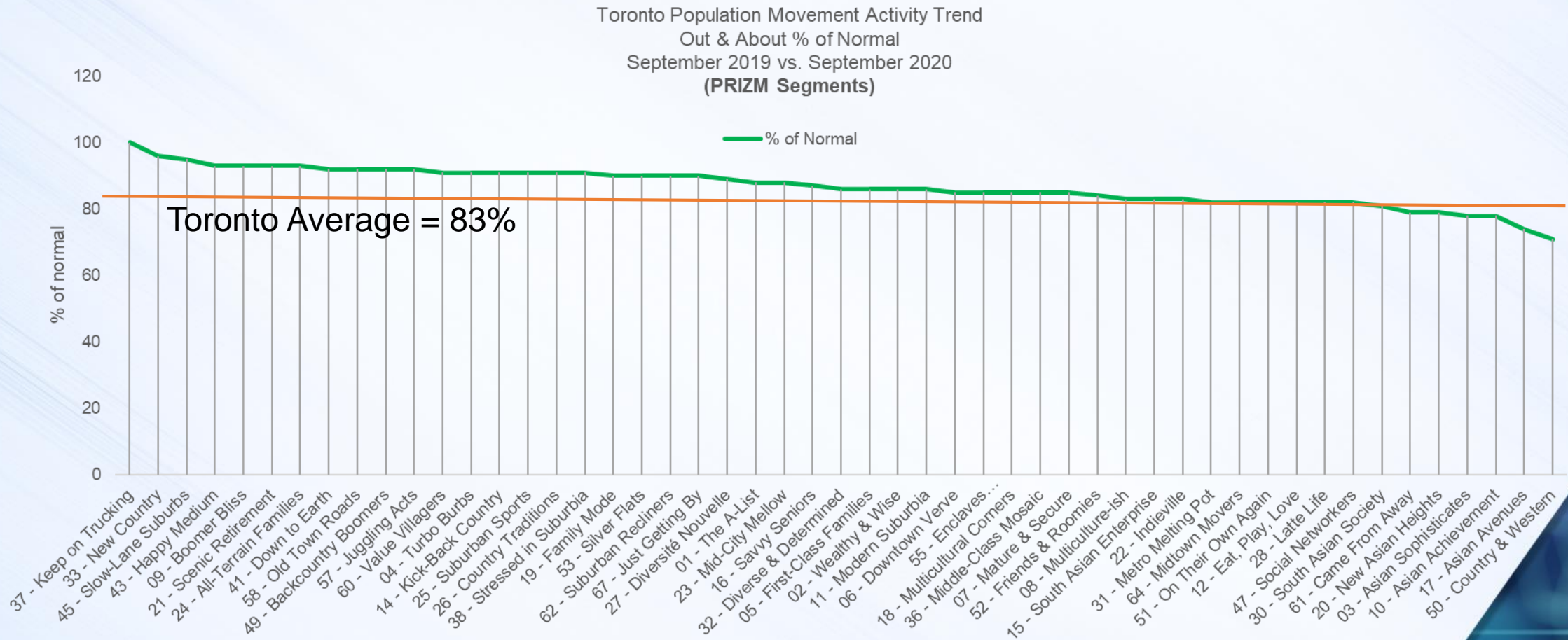
Toronto Average = 83%

Toronto Population Movement Activity Trend  
Out & About Count  
September 2019 vs. September 2020  
(by Life Stage)



## In the Toronto area:

- Suburban PRIZM segments are out and about the most (many 90%+) as they attend to their varied family activities, errands, commuting and school.
- Urban PRIZM segments are also actively out and about (80 – 85%+); they travel less than the suburban segments, but they have always traveled fewer KMs because their commute times are less.



EnviroNics Analytics MobileScapes Out & About Activity Trend (September 2019 vs. September 2020)

2019 = September 1<sup>st</sup> 2019 to September 30<sup>th</sup> 2019

2020 = September 1<sup>st</sup> 2020 to September 30<sup>th</sup> 2020

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# Summary

- Out-of-Home has always been a mass reach medium; with 80%+ of the market population out and about everyday, Out-of-Home is still offering that reach opportunity.
- Distances travelled and hours spent outside the home are currently reduced, but we are still out and about; frequency of travel may have increased in local neighbourhoods.
- Everyone is out and about. Analyzed by age, income, PRIZM segment, we see consistent results.
- Torontonians in September were actively out of their homes -- 83% compared to year ago, equaling more than 3.7 million people.
- The “9 to 5” weekly work day is still true – 72% of the time compared to year ago – as people are travelling to physical work locations, running errands during the day, going to school, adapting to living their lives in new ways.
- Activity after 6pm this September almost equaled the same timeframe last year.
- “Active TO” was a success this year – Torontonians spent more time out of their homes on weekends than on weekdays.
- Both Suburban and Urban areas are active. It is important to look to neighbourhoods in the Urban core to see where the busiest activity is.

# Key Learnings

- Movement (out and about) vs commuting – the daily commute is reduced, at least temporarily. But people are still out and about everyday: travelling to work, going to school, running daily errands, participating in family activities:
  - GRPs make sense: more locations in more neighbourhoods to reach people where they live
  - Torontonians live downtown, not just work there. Downtown is a neighbourhood! Reaching people where they live includes all neighbourhoods
  - Various OOH formats will be required to properly cover all neighbourhoods within the market; posters, street level, transit, digital networks all have a role to play.
  - Landmark locations still make sense; but they should be part of a larger plan.
  - Commuter routes also still make sense; they reach your target audience. Expanding your media plan to include more locations, though, will improve it

# Key Learnings (cont'd)

- Consider new areas for your messaging where more and new people may be receptive to your offer
- Hyper-local creative may make sense for your campaign:
  - Multiple creatives can help tailor your messaging to various areas of the market
- There is room for both branding and promotional messaging:
  - How people are buying today has shifted – brand awareness is critical
  - Effectiveness vs efficiency: OOH drives effectiveness



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# Supplementary Data Source Details



## Pelmorex Mobility Location Daily Data

- Pelmorex geo-fenced over 24,000 PATTISON locations across Canada. The traffic data derived from these locations are being used to gauge traffic volume
- Baseline: January 1<sup>st</sup>, 2020 to March 15<sup>th</sup>, 2020
- January 1<sup>st</sup> to September 27<sup>th</sup>, 2020 traffic data was used as a supplement to show the projection of traffic trend



## Apple Mobility Daily Data (Driving)

- March 1<sup>st</sup> to September 27<sup>th</sup>, 2020 traffic data was used as a supplement to show the projection of traffic trend
- A relative volume of directions requests per country/region, sub-region or city compared to a baseline volume on January 13<sup>th</sup>, 2020
- <https://www.apple.com/covid19/mobility>



## Google Mobility Daily Data

- March 1<sup>st</sup> to September 27<sup>th</sup>, 2020 traffic data was used as a supplement to show the projection of traffic trend
- The baseline day is the median value from the 5-week period January 3<sup>rd</sup>, 2020 to February 3<sup>rd</sup>, 2020
- *Retail & Recreation* includes restaurants, cafes, shopping centres, theme parks, museums, libraries and movie theaters
- *Grocery & Pharmacy* includes grocery markets, food warehouses, farmers markets, specialty food shops, drug stores and pharmacies
- <https://www.google.com/covid19/mobility/>



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# THANK YOU



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