Statistical Appendix

Downtown Toronto: Economic Importance, Challenges and Actions to Revitalize

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Statistical Appendix

Downtown Toronto: Economic Importance, Challenges and Actions to Revitalize

This appendix assembles readily available statistics up to mid February 2025 on downtown Toronto before and during the COVID-19 pandemic and explores what has happened since.

The Boundaries of Downtown Toronto

Downtown Toronto is defined in different ways by various sources. The definition adopted here reflects the boundaries delineated in the City of Toronto's Official Plan (see Figure A-1).
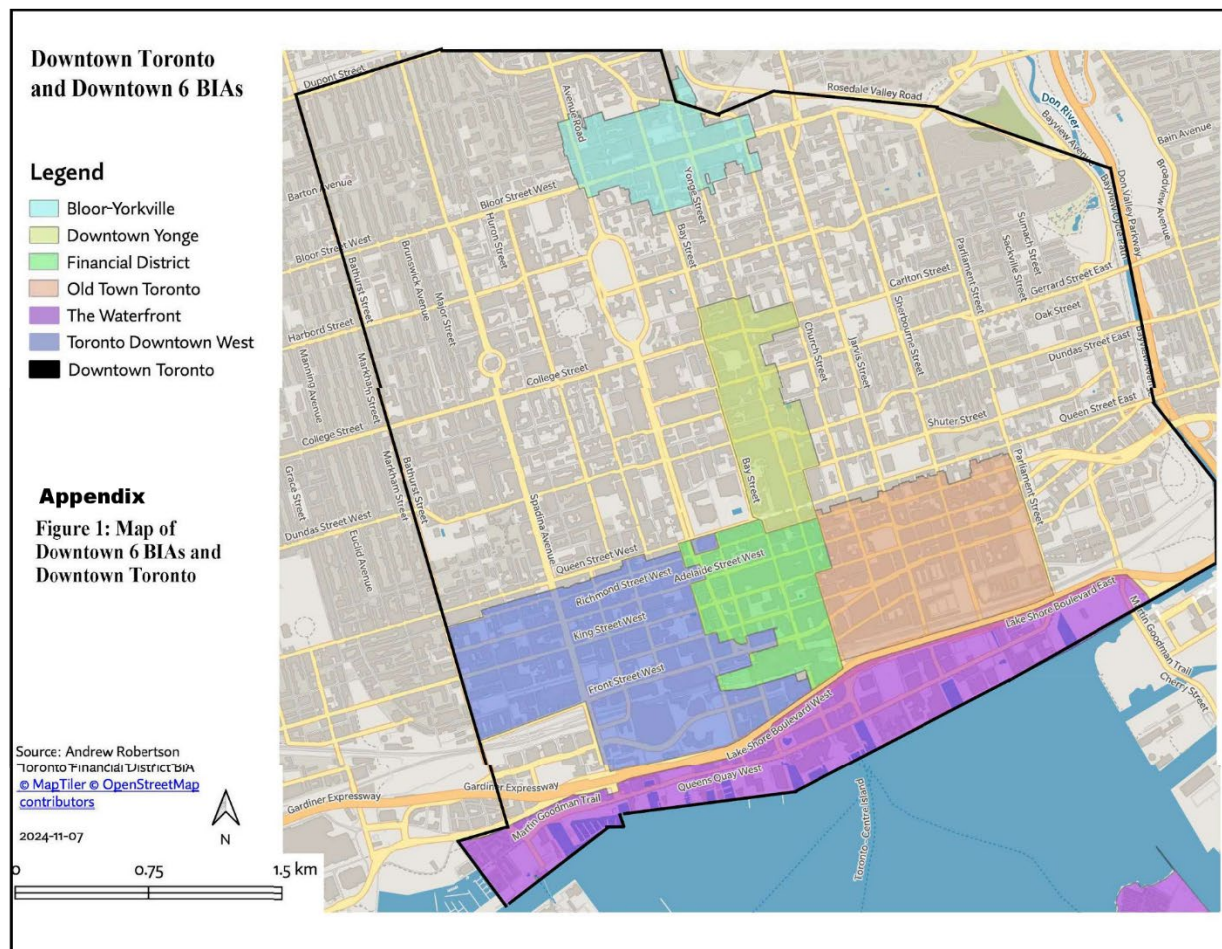
These boundaries extend from the Don Valley on the east to Bathurst Street on the west, Davenport Road on the north, and Lake Ontario to the south.

There are six BIAs covering territories within downtown Toronto. They include the Financial District, the Waterfront, the Downtown Yonge Street corridor, Yorkville and downtown areas east and west of the Financial District.

Downtown Toronto Before the Pandemic

Employment

Total employment

Figure A-2 shows the total employment in downtown Toronto and the entire city in 2019.

Figure A-2: Total Employment, Downtown Toronto and City of Toronto, 2019, Jobs (000s)

Source: City of Toronto. 2019 Employment Survey.
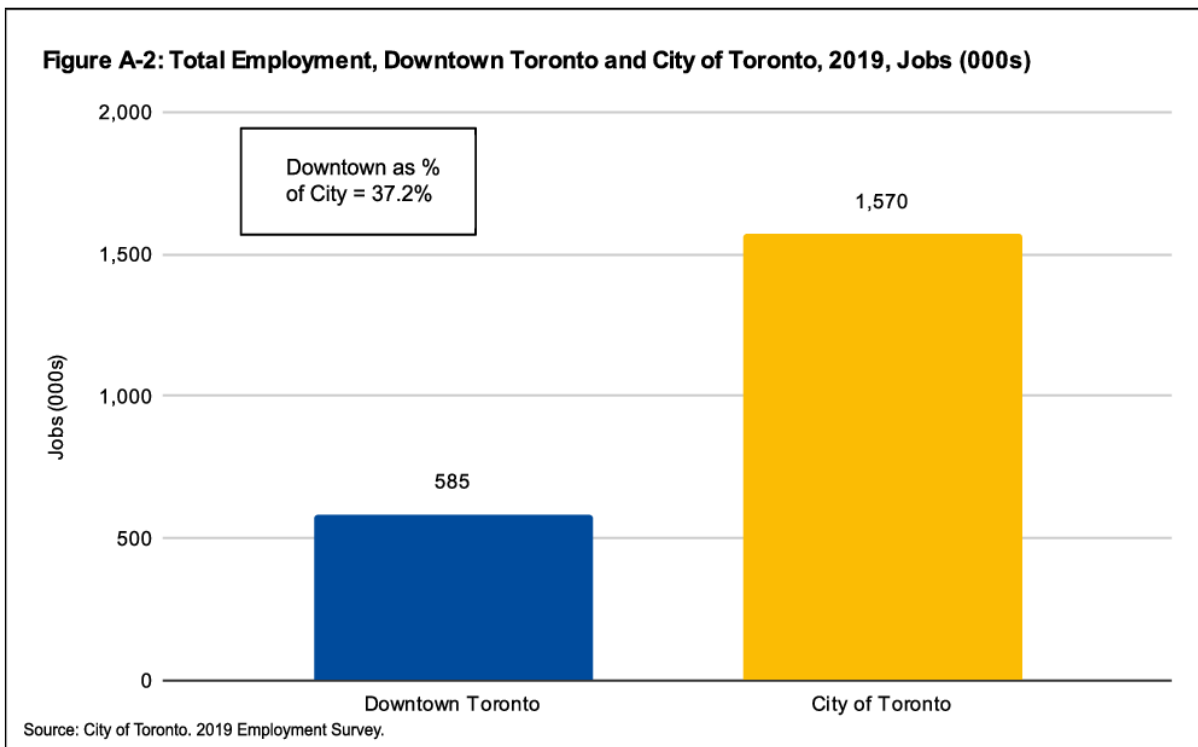
The City's 2019 Employment Survey tabulated 585,000 jobs in downtown Toronto, which amounted to 37.2% of all jobs in the city.

Employment by category

Figure A-3 presents employment by category for the downtown area and the downtown as a percent of Toronto in 2019.

Figure A-3: Employment by Category, Downtown Toronto and as a Percent of the City of Toronto, 2019, Jobs (000s)

Source: City of Toronto. 2019 Employment Survey.
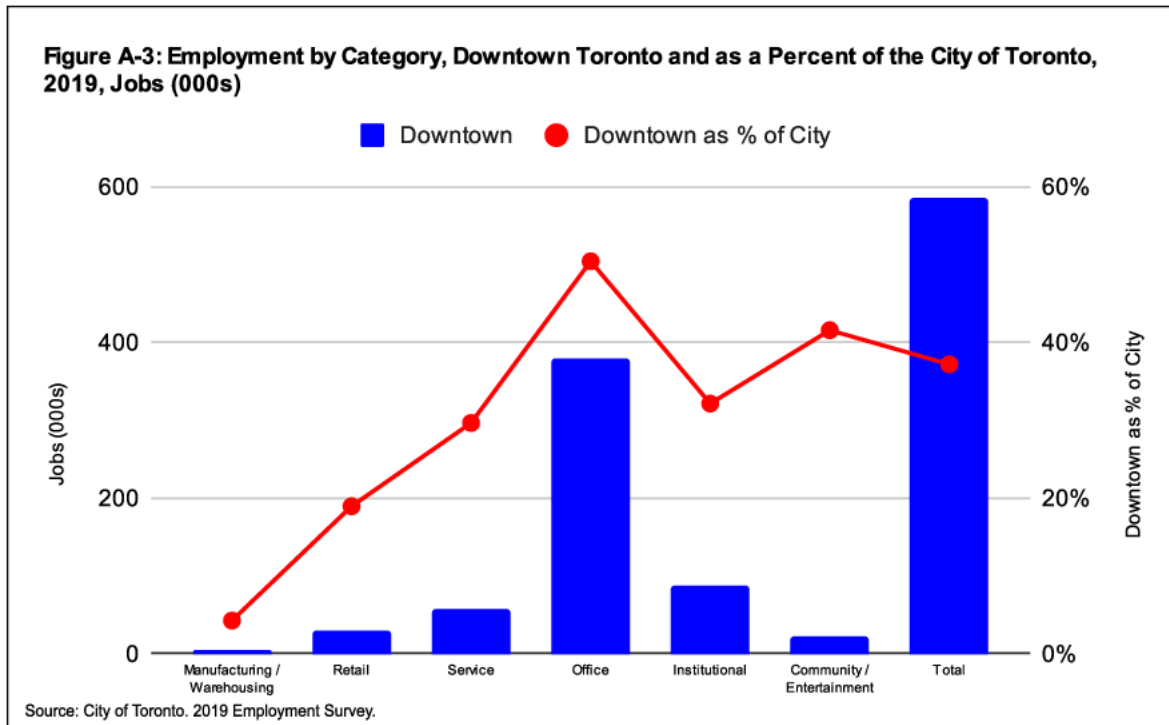
The city's jobs in the office (50.4%) and community and entertainment (41.6%) categories were concentrated downtown. Significant jobs were also in the institutional and service categories downtown (32.2% and 29.7%, respectively).[1]

Office jobs dominated downtown

Figure A-4 provides the percentage breakdown of downtown jobs by category in 2019.

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[1] Office employees include those working in building types other than office buildings.

Figure A-4: Downtown Toronto Employment by Category, 2019, Percentage Share of Total Employment

Source: City of Toronto. 2019 Employment Survey.
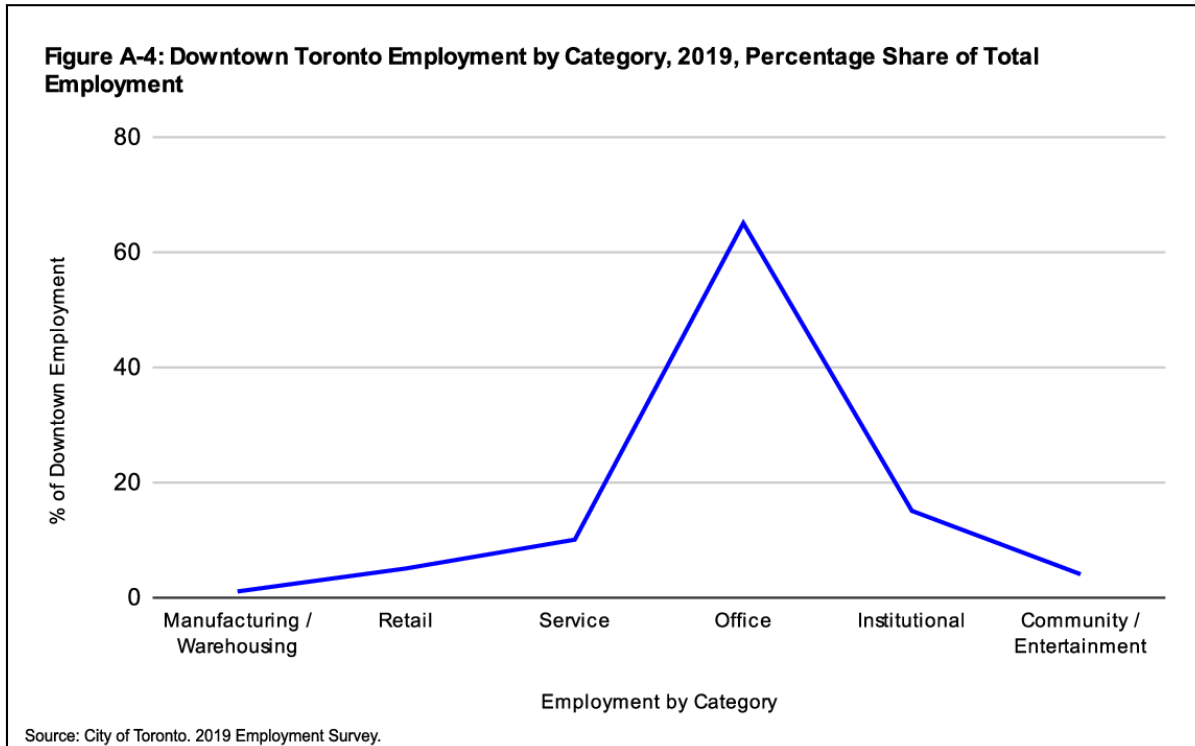
Approximately two-thirds of all downtown jobs (65%) were office jobs in 2019, followed by institutional jobs (15%) and service jobs (10%).

Economic Activity and Tax Revenue

Downtown Toronto made an even larger contribution to gross domestic product (GDP)

Figure A-5 presents the estimated gross domestic product (GDP) generated within the downtown area in 2019 and 2023 and compares it to the city as a whole, the metropolitan region, Ontario and Canada.

Figure A-5: Gross Domestic Product Generated in Downtown Toronto Compared to City of Toronto, Toronto CMA, Ontario and Canada, 2019 and 2023*		
	Gross Domestic Product	
	2019	2023
Downtown Toronto (Billions $)	$84.6	$117.7
Downtown Toronto as % of:		
City of Toronto	41.8%	43.7%
Toronto CMA**	20.0%	22.4%
Ontario	10.2%	11.3%
Canada	4.1%	4.5%

* Based on economic activity generated by downtown employees by industry including hybrid employees
** CMA = census metropolitan area
Source: Diana Petramala, Petramala Research Inc., based on Statistics Canada data, including data provided by Toronto Economic Development.

The downtown's estimated GDP was $84.6 billion in nominal dollars in 2019. This is equivalent to 41.8% of the city's GDP, 20.0% of the Toronto CMA, 10.2% of Ontario and 4.1% of Canada. Its nominal GDP climbed to $117.7 billion by 2023.

Tax revenues generated - mainly to the federal and provincial governments

Figure A-6 presents the estimated tax revenues by level of government generated by downtown Toronto's economic activity in 2019 and 2023.

Figure A-6: Tax Revenues Generated in Downtown Toronto by Level of Government, 2019 and 2023, Billions of Dollars

Source: Diana Petramala, Petramala Research Inc., based on Statistics Canada data, including data provided by Toronto Economic Development.
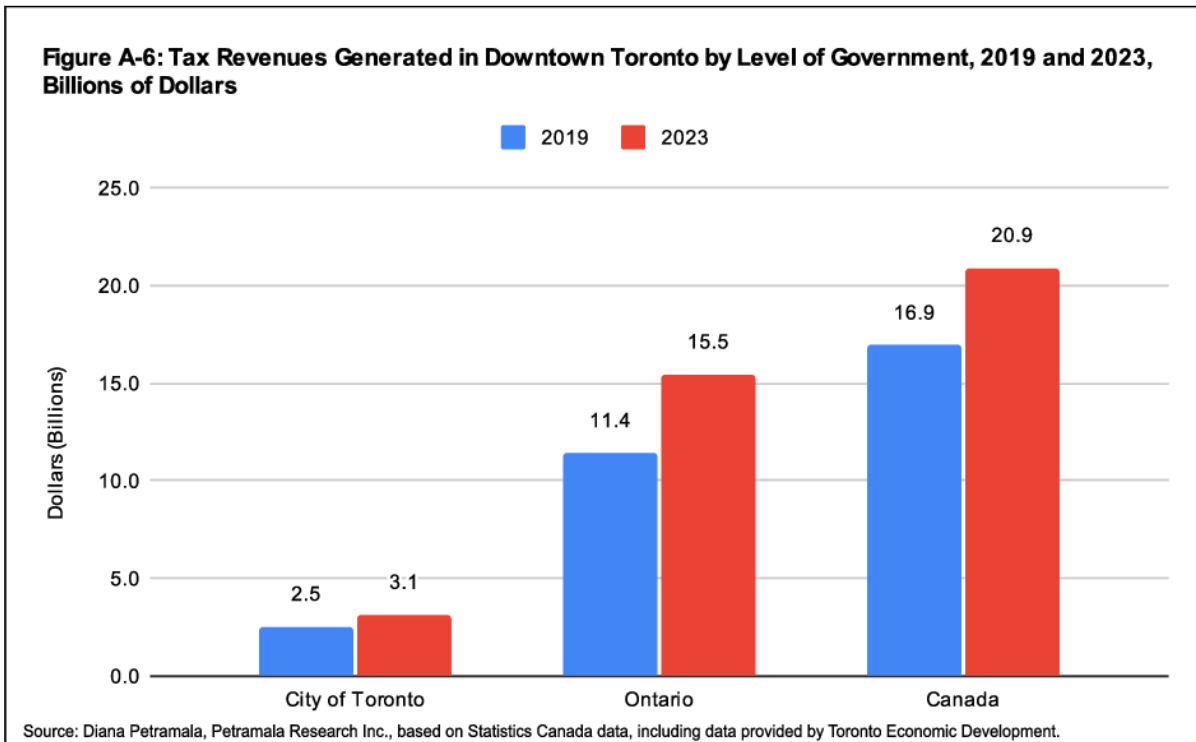
In 2019, downtown Toronto's economic activity generated $30.9 billion in tax revenue. The federal government was the largest beneficiary ($16.9 billion or 55% of the total tax revenue). The provincial government was next ($11.4 billion, or 37%). Municipal revenues were much lower at $2.5 billion (8% of the total). Tax revenue increased to $39.5 billion by 2023, with the increased revenues flowing mainly to the two senior governments.

City of Toronto property tax revenue

Figure A-7 provides estimates of pre-pandemic property tax revenues from commercial properties in downtown Toronto in two alternate ways: taxes associated with all commercial assessment (largely office and retail properties) located within the Downtown Six BIAs and office towers in the larger downtown.

Figure A-7: Commercial Property Tax Assessment, Downtown Toronto and as a Percent of City, 2019						
	Property Assessment (Billions $)	**Tax Rate**		**Property Tax Revenues (Millions $)**		
		City	**Education**	**City**	**Education**	**Total**
All Commercial Assessment - Downtown Six BIAs						
Downtown Toronto	43.5	1.2471%	1.03%	542	448	990
City of Toronto	118.1	1.2471%	1.03%	1,473	1,216	2,689
Downtown as % of City	36.8%			36.8%	36.8%	
Office Tower Assessment - Downtown Toronto						
Downtown Toronto	28.9	1.2471%	1.03%	360	298	658
City of Toronto	38.1	1.2471%	1.03%	475	392	867
Downtown as % of City	75.9%			75.9%	75.9%	

* Office tower assessment for the year 2021
Source: City of Toronto Tax Levy By-law 2019 and 2019 BIA Levy By-law and David Fitzpatrick, City of Toronto.

The portion of the downtown covered by the Downtown Six BIAs produced an estimated $990 million in property tax revenue in 2019. Of this, $542 million went into City coffers, and $448 million went to the province for education. These revenues accounted for 36.8% of all commercial tax revenues for the City.

Looking at office towers alone, the downtown generated an estimated $658 million in property tax revenue - $360 million for the City and $298 million for education. Three-quarters of all property tax revenue from office towers in Toronto came from the downtown in 2019.

Office Space Market

Figure A-8 provides a snapshot of the downtown Toronto office building space market at the end of 2019 with comparisons to the Greater Toronto Area (GTA) and Canada.

Figure A-8: Snapshot as of Q4 2019 with Net Absorption & New Supply as Total for 2019 (sum of Q1 to Q4 figures)

		Toronto					Canada				
		Inventory	Vacant Space	Vacancy Rate	Net Absorption	New Supply	Inventory	Vacant Space	Vacancy Rate	Net Absorption	New Supply
All Classes	Total Market	163,068,655	10,934,008	6.7%	1,918,838	602,714	468,579,060	50,965,291	10.9%	5,979,187	1,599,076
	Downtown	86,715,281	1,915,621	2.2%	815,213	389,317	256,776,532	25,262,602	9.8%	2,067,749	993,016
	Suburban	76,353,374	9,018,387	11.8%	1,103,625	213,397	211,802,528	25,702,689	12.1%	3,911,438	606,060
Class A	Total Market	100,180,476	6,328,500	6.3%	778,054	423,220	263,733,237	25,628,244	9.7%	3,374,050	1,283,247
	Downtown	57,298,353	1,133,992	2.0%	314,396	335,323	155,210,597	12,989,379	8.4%	859,361	939,022
	Suburban	42,882,123	5,194,508	12.1%	463,658	87,897	108,522,640	12,639,865	11.6%	2,514,689	344,225
Class B&C	Total Market	62,888,179	4,605,508	7.3%	1,140,784	179,494	204,845,823	25,337,047	12.4%	2,605,137	315,829
	Downtown	29,416,928	781,629	2.7%	500,817	53,994	101,565,935	12,274,223	12.1%	1,208,388	53,994
	Suburban	33,471,251	3,823,879	11.4%	639,967	125,500	103,279,888	13,062,824	12.6%	1,396,749	261,835

Downtown as a % of Total Market

		Toronto					Canada				
		Inventory	Vacant Space		Net Absorption	New Supply	Inventory	Vacant Space		Net Absorption	New Supply
All Classes		53.2%	17.5%		42.5%	64.6%	54.8%	49.6%		34.6%	62.1%
Class A		57.2%	17.9%		40.4%	79.2%	58.9%	50.7%		25.5%	73.2%
Class B&C		46.8%	17.0%		43.9%	30.1%	49.6%	48.4%		46.4%	17.1%

Toronto as a % of Canada

		Inventory	Vacant Space		Net Absorption	New Supply
All Classes	Total Market	34.8%	21.5%		32.1%	37.7%
	Downtown	33.8%	7.6%		39.4%	39.2%
	Suburban	36.0%	35.1%		28.2%	35.2%
Class A	Total Market	38.0%	24.7%		23.1%	33.0%
	Downtown	36.9%	8.7%		36.6%	35.7%
	Suburban	39.5%	41.1%		18.4%	25.5%
Class B&C	Total Market	30.7%	18.2%		43.8%	56.8%
	Downtown	29.0%	6.4%		41.4%	100.0%
	Suburban	32.4%	29.3%		45.8%	47.9%

Downtown Toronto's office market was incredibly tight in 2019

The downtown office vacancy rate at the end of 2019 was just 2.2%, far below a balanced market vacancy rate of around 10%. The vacancy rate in the suburban GTA and the combined major office markets across Canada was in the 10%-11% range.

Downtown Toronto accounted for the majority of office building space in the GTA and a significant share of space in Canada's largest office markets

At the end of 2019, the downtown Toronto area had a space inventory of 87.7 million square feet. This space was equivalent to 53% of the entire office building space inventory in the GTA and 28% of all space in the major office market areas across Canada.

Two-thirds of the downtown inventory consisted of Class A floor space

Much of the office inventory in downtown Toronto consisted of Class A space.

Net absorption of office space in 2019 divided among the downtown and the suburbs

In 2019, both the downtown and suburbs posted strong occupancies of office space (815,213 square feet and 1,103,625 square feet, respectively).

Population

Sizeable and growing population

Figure A-9 presents the 2016 downtown population and growth from five years earlier.[2]

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[2] The years 2011 and 2016 are years the Census of Canada was conducted.

Figure A-9: Total Population, Downtown Toronto, 2011 and 2016, Persons (000s)

Source: Census of Canada.
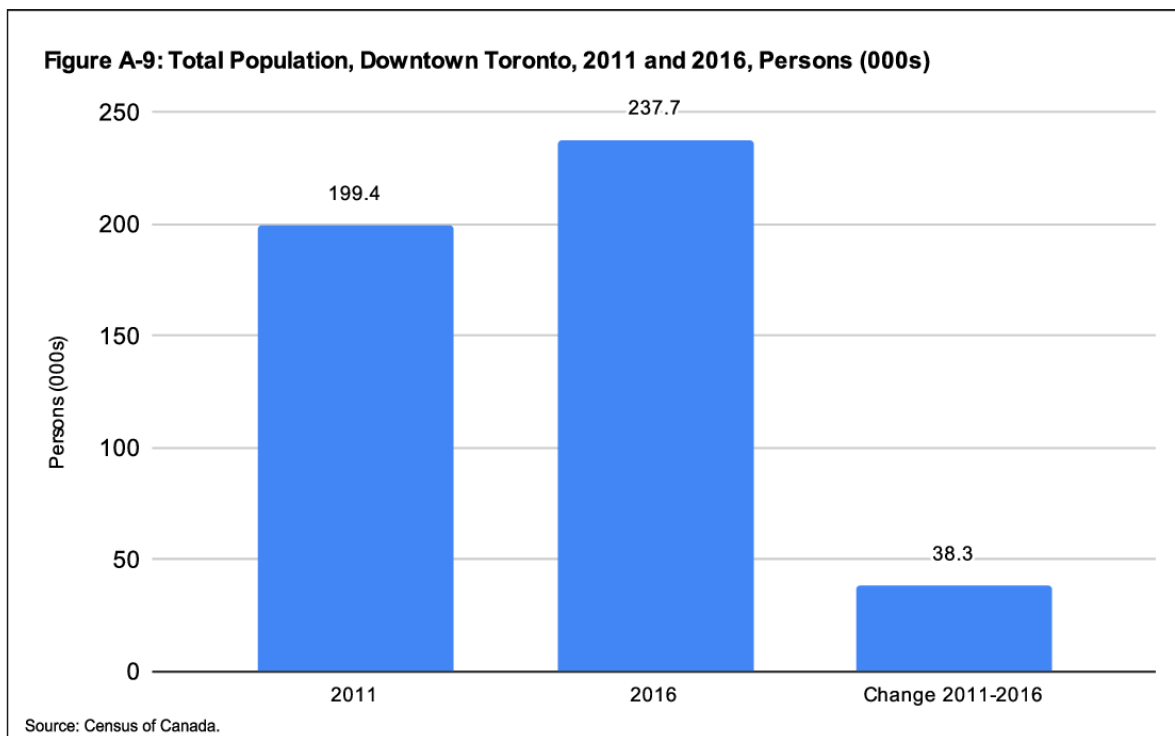
Toronto is one of North America's few large central cities with a sizable downtown population growing rapidly before the pandemic. The downtown also accounted for a sizable portion of the city's growth in the first half of the 2010s (almost one-third).

Downtown Toronto During and Post-Pandemic

Employment

The Employment Survey reports downtown employment fell sharply in 2020, though 2023 and 2024 saw recovery exceeding 2019 statistics

Figure A-10 presents the total employment in downtown Toronto from 2016 to 2024.

Figure A-10: Total Employment, Downtown Toronto, 2016-2024, Jobs (000s)

Source: City of Toronto. Annual Employment Surveys.
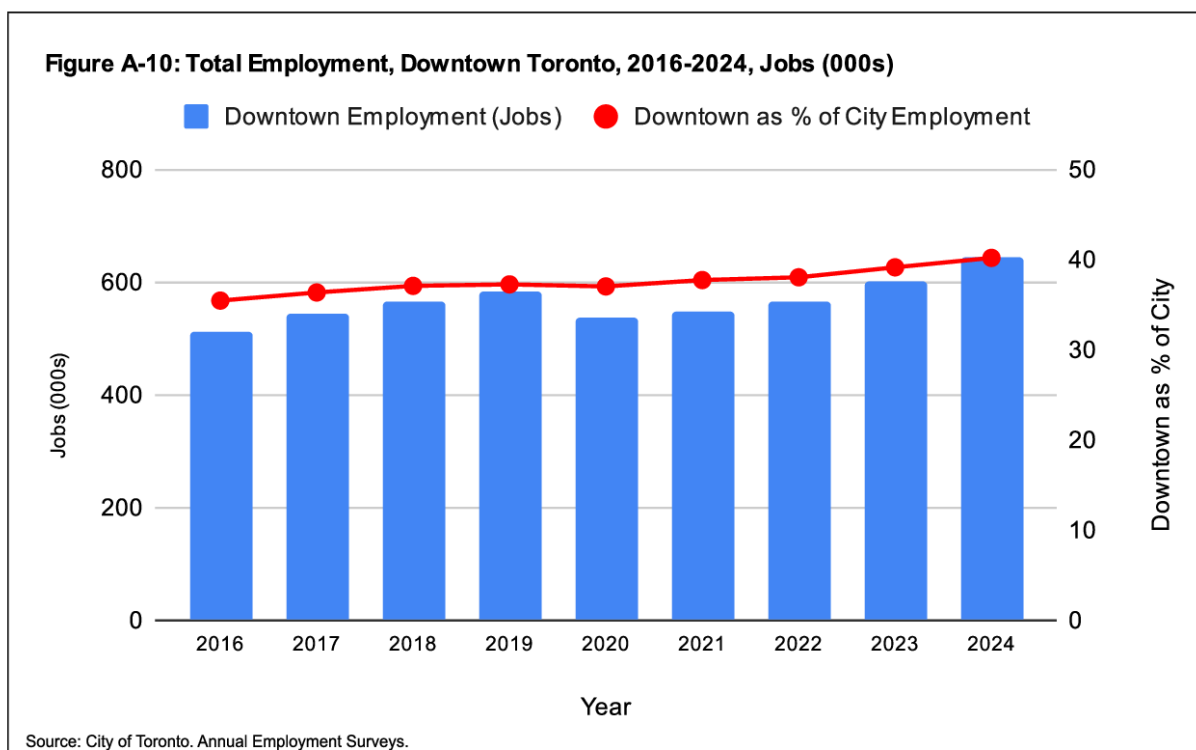
Total downtown employment, as recorded in the City's Employment Surveys, climbed rapidly between 2016 and 2019. Employment fell precipitously in 2020 when a pandemic-induced general lockdown began in March of this year - reported job losses totaled 47,350.

Downtown employment picked up in 2021-2024, and by 2024, there were 58,740 jobs surpassing 2019 numbers. In contrast, the rest of the city had not yet achieved 2019 employment levels.

These downtown employment data do not distinguish between employees on-site full-time from those with hybrid work arrangements resulting from the pandemic (see below). They did not include employees working at home.

The Employment Survey reports growth focused in office and institutional categories

Employment by category in the downtown for the years 2016-2024 is presented in Figure A-11.

Figure A-11: Employment by Category, Downtown Toronto, 2016-2024, Jobs (000s)

Source: City of Toronto. Annual Employment Surveys.
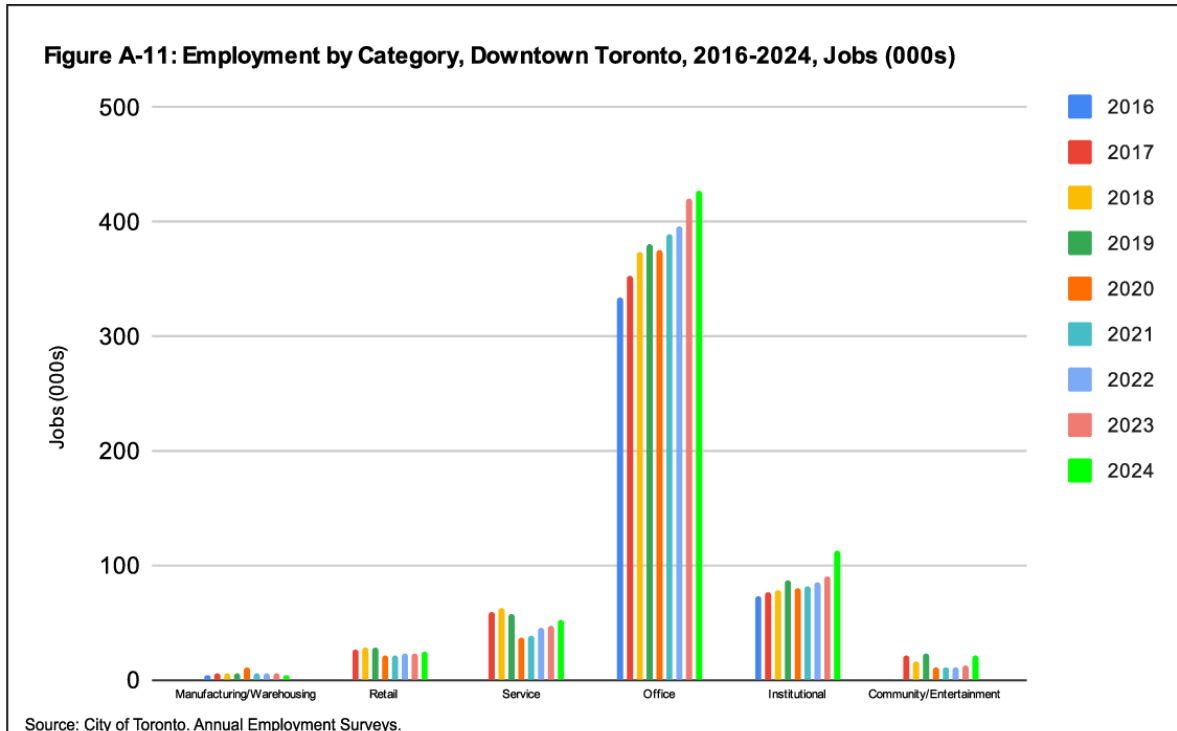
Office workers dominate downtown employment with 426,840 employees on-site or in hybrid working arrangements in 2024.

The Employment Survey results exaggerate the number of employees at places of work downtown five days a week, but the occupancy index is increasing

The 2024 Employment Survey found 126,890 employees working remotely all or part of the time.[3] This represents nearly two-thirds of all downtown employees.

Figure A-12 presents the Office Occupancy Index for downtown Toronto created by the Strategic Regional Research Alliance from 2020 through 2024. The index is intended to measure the percentage of office employees returning to the office compared to the number of employees who would normally have come to their office pre-COVID.

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[3] Toronto City Planning. "Toronto Employment Survey 2024". January 2025.

Figure A-12: Office Occupancy Index, Downtown Toronto, May 2020-December 2024
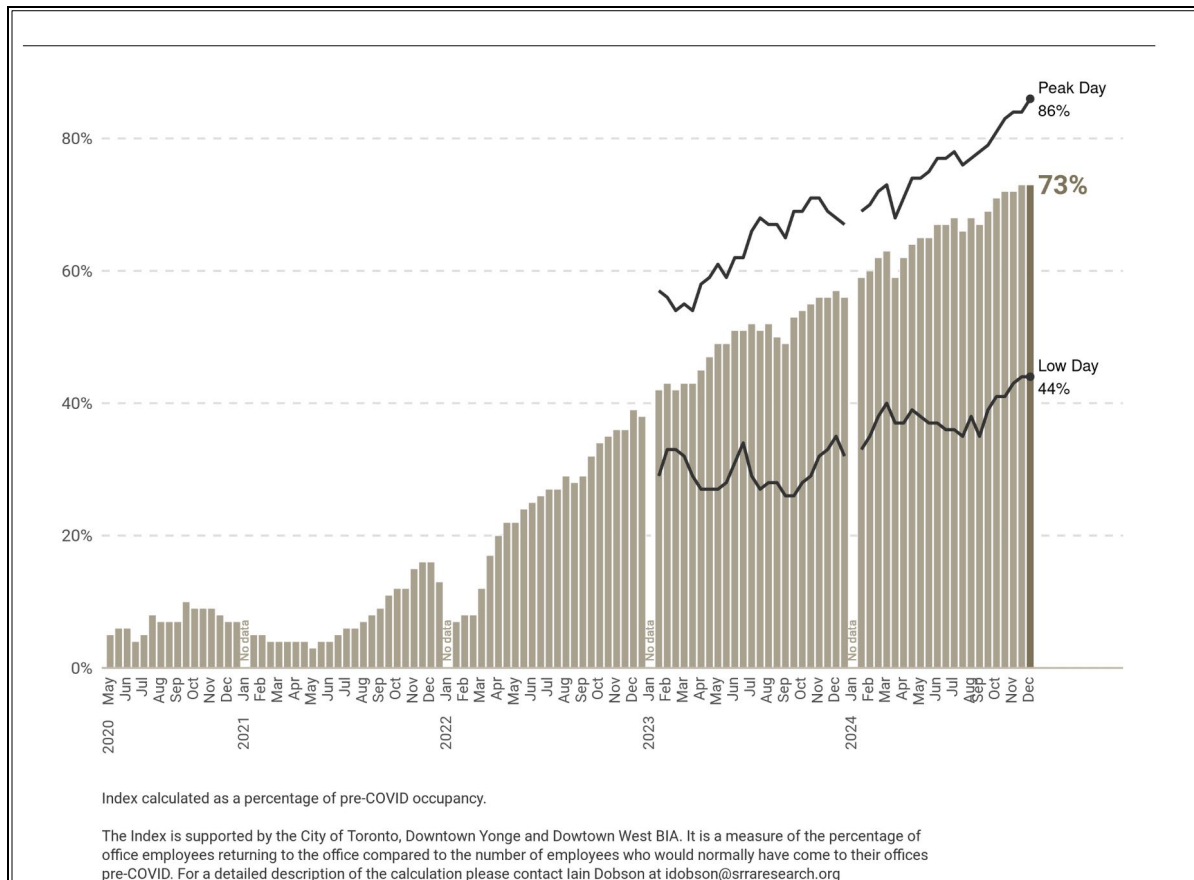
Source: Strategic Regional Research Alliance.

The estimates are that as of December 1, 2024, the average weekly occupancy has recovered to 73%, with Wednesday being the peak day at 86% on-site and Friday being the low day at 44%. The average weekly and peak day percentages have steadily risen for many months.

However, it is unlikely that the weekly average will again reach the pre-COVID average.

Office Space Market, Work from Home and Hybrid/Flexible Working Arrangements

Figure A-13 shows downtown recovery rates in many North American metropolitan areas.

Figure A-13: Downtown Recovery Rates* in North American Metropolitan Areas (through 2023)
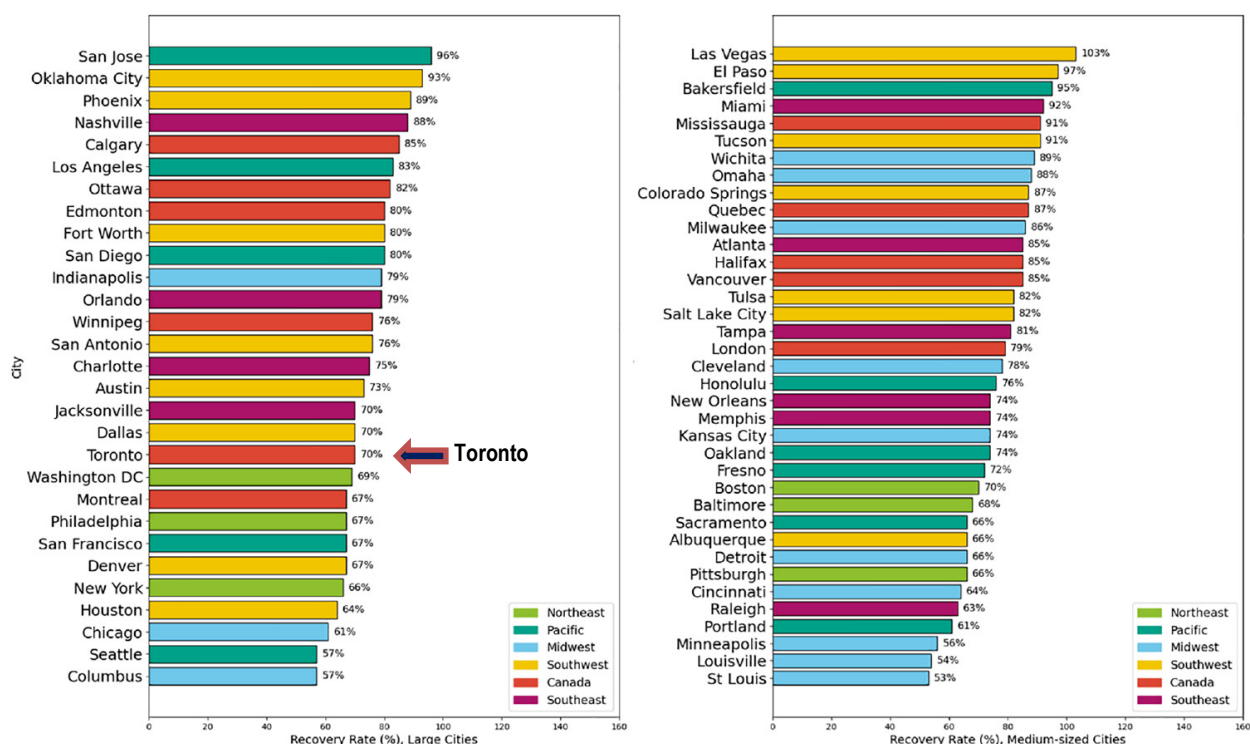
*Reflects visitor foot traffic counts to downtown area; tracked by cell phone; See publication for adjustments.

Source: Forouhar, A., Chapple, K., Allen, J., Jeong, B., & Greenberg, J. (2024). Assessing downtown recovery rates and determinants in North American cities after the COVID-19 pandemic. Urban Studies, 0(0). https://doi.org/10.1177/00420980241270987

Recent academic research on recoveries of downtowns in North America based on foot traffic counts suggests that as of 2023, Toronto was 70% recovered. This is comparable to or better than many large U.S. cities, but recovery lags other Canadian cities in the study, including Vancouver, Calgary, and Edmonton.

Figure A-14 compares downtown Toronto's office building recovery rate with that of selected cities in the United States.

Figure A-14: Downtown Toronto Office Building Recovery vs. Major U.S. Cities
Office Building Visits, Dec. 2024 Relative to Dec. 2019

City	Recovery
New York, NY	80.4%
Miami, FL	79.1%
TORONTO*	73.0%
Atlanta, GA	65.9%
Dallas, TX	64.8%
U.S. Nationwide	60.6%
Washington, D.C.	57.6%
Houston, TX	57.2%
Boston, MA	54.1%
Los Angeles, CA	52.7%
Denver, CO	50.6%
San Francisco, CA	48.0%
Chicago, IL	47.8%

*Toronto calculations based on surveys and interviews; not exactly consistent with U.S. data derived from cell phone tracking.
Sources: Toronto data from Regional Research Alliance (SRRA); U.S. data from Placier.ai

While not strictly comparable, owing to different data sources and methodologies, the extent of recovery follows similar patterns, albeit with varying magnitudes across U.S. cities. These numbers place downtown Toronto recovery ahead of many U.S. cities, though lagging behind New York City and Miami that have jockeyed for top spot over the past few months.[4]

Figures A-15 and A-16 show the share of workers working from home by industry and city size in the United States.

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[4] Placier.ai cellphone foot traffic-based data is derived from activity at more than 700 office properties in the U.S. For more information see, "The Return to the Office. White Paper on Foot Traffic Methodology and Findings". www.placer.ai/wp-form/the-return-to-office. Another widely reported source of return to the office (RTO) not shown here is the Kastle Back to Work Barometer: https://www.kastle.com/safety-wellness/getting-america-back-to-work/. Kastle's data, derived from counts of employee security card swipes, shows considerably lower recovery in major U.S. markets compared to Placier.ai. It has come to light that Kastle's coverage of office properties varies considerably across metros and tends to be skewed towards smaller Class B and C properties, and in some markets, the suburbs. For more on the challenges of measuring back to the office and evaluation of alternative sources with a NYC focus, see Boyle (2022) and Cuozzo (2023).

Figure A-15: Current working from home: All wage and salary employees

Current working from home: All wage and salary employees

Industry	Days per week
Information (incl. part of tech)	2.68
Finance & Insurance	2.23
Professional & Business Services	2.02
Wholesale Trade	1.84
Arts & Entertainment	1.68
Real Estate	1.68
Construction	1.50
Government	1.41
Utilities	1.33
Health Care & Social Assistance	1.25
Education	1.25
Other Personal Services	0.96
Manufacturing	0.90
Retail Trade	0.80
Transportation and Warehousing	0.68
Hospitality & Food Services	0.62

Working from Home is Most Prevalent in Finance, Technology & Business & Professional Services

Figure A-16: Percent of paid full days worked from home

Percent of paid full days worked from home

Work from Home More Prevalent in Big Cities

Legend: Top 10 cities by population; Cities 11 to 50; Smaller cities and towns

*We define cities using Combined Statistical Areas and use the location of the respondent's current job.
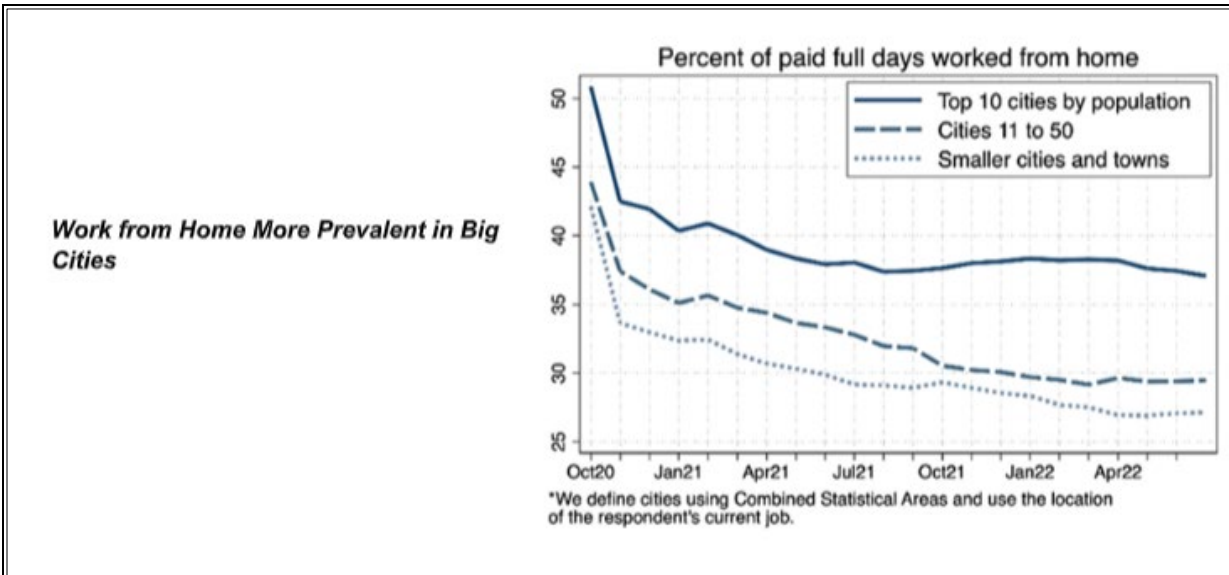
The "hybrid" or blended office work model is not a temporary phenomenon but a permanent shift in sectors where it is feasible for employees to do so. Recent research from CBRE (2024) suggests that 80% of office occupiers in the U.S. have adopted and will sustain hybrid work policies. The monthly "Survey of Working Arrangements and Attitudes" from WFH Research, along with highly

regarded academic work published by the firm's founders, provides strong support for and unique insight into the new hybrid nature of office work.[5]

Figure A-17 presents the results of a survey of workers about the benefits of working from home.

Figure A-17: What are the top benefits of working from home?
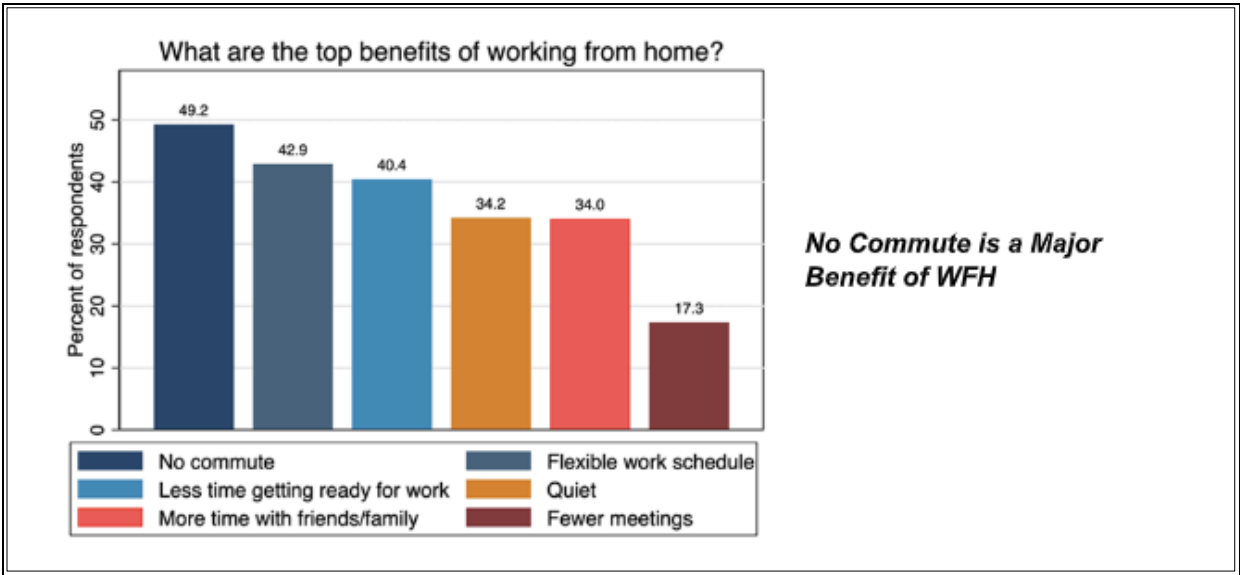
The findings that the hybrid work model is most widely adopted in firms that it concentrates on, including Finance, Tech, and Business Services, are of particular relevance to the future of downtown Toronto.[6] Moreover, hybrid work is more of a "big city" phenomenon, a finding likely driven by the length and experience of the commute; "no commute" is the number one benefit of working from home expressed by workers.[7]

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[5] WFH Research was founded in May 2020 in response to the dramatic impact of COVID-19 on working arrangements. The paper "The Evolution of Working from Home" provides insightful context about the history of working from home and the acceleration caused by the intersection of the COVID-19 pandemic and technology innovation related to video/virtual meetings and collaboration - https://wfhresearch.com/wp-content/uploads/2023/07/SIEPR1.pdf.

[6] Forouhar, Chapple, Allen, Jeong & Greenberg (2024) report statistical evidence that downtown recoveries of foot traffic were inversely related to the concentration of employment in the same top three sectors with a propensity for WFH.

[7] It is important to note that acceptance of the hybrid office & WFH model is not only coming from the employee side. The monthly SWAA conducted by WFH Research also surveys employers about their plans/policies looking ahead 1 year. The average number of days employers plan to have/allow employees WFH has stabilized at about 2.2 to 2.3 over the past two years.

Greater Toronto vacancy rates - downtown vacancy rate increased faster than the suburban rate

Figure A-18 presents office vacancy rates by year 2019-2023 and January to September 2024 for downtown Toronto and suburban GTA (GTA less downtown Toronto).
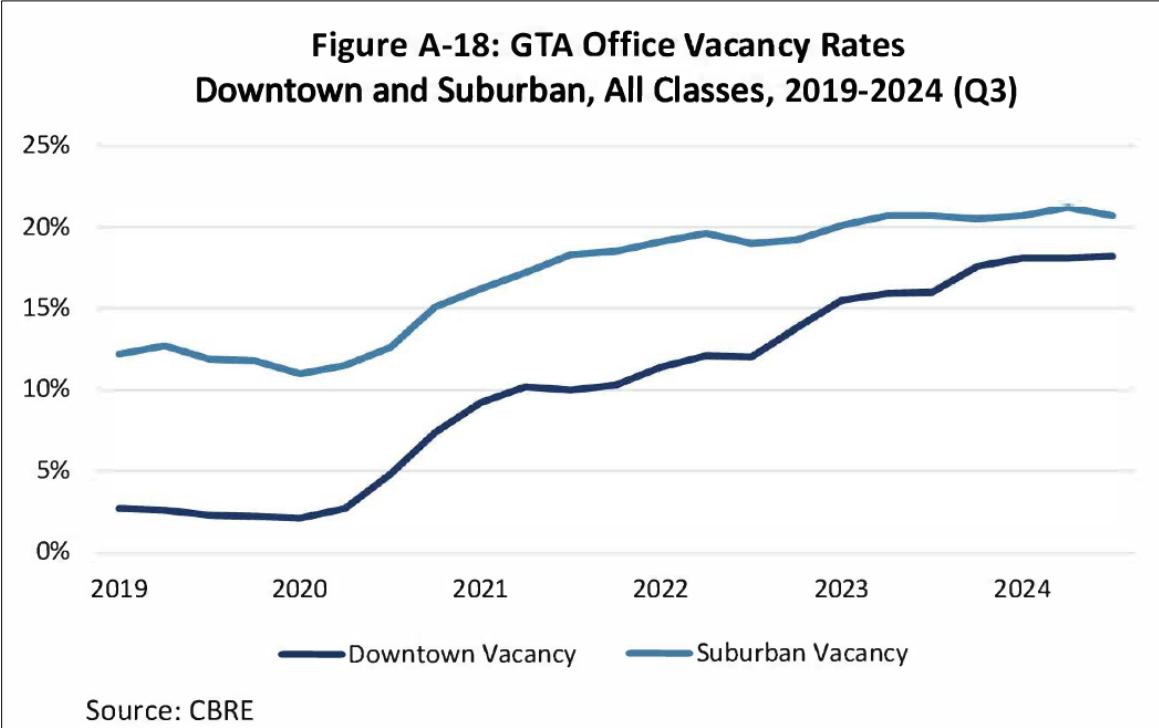
As noted earlier, just prior to the pandemic, the downtown Toronto office market was remarkably robust, with an overall vacancy rate of 3.0%. The suburbs, in contrast, had a vacancy rate of 12%, which was at the lower end of the tenants' market. The vacancy rates then increased sharply, especially for the downtown, between 2021 and 2023. The most recent data show a levelling off in vacancy rates at 17% and 20% in both areas respectively.

The downtown vacancy rate stayed below the suburbs despite a flurry of new supply

Figure A-19 summarizes the supply of new office space completed between January 1, 2019 and September 2024.

Figure A-19: GTA New Office Supply, Downtown Toronto and Suburban, 2019-2024 (Q3), Sq. Ft. (000s)

Suburban, 1,469

Downtown , 10,048
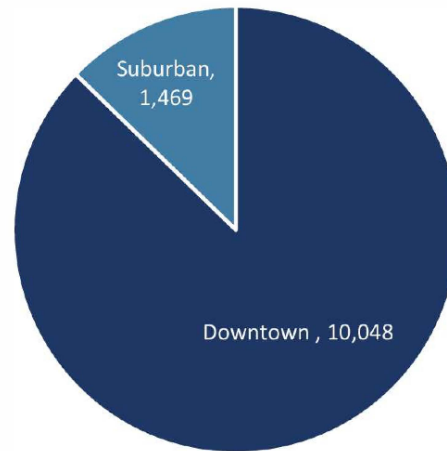
Source: CBRE

Over these almost six years, Greater Toronto completed 11.5 million sq. ft. of new office space. Of this sum, 10 million square feet was added to the downtown office stock (87%).

Considering this vast supply of new office space, the downtown office market performed exceptionally well both during and after the pandemic.

Flight to quality was a feature of the downtown office market

Figure A-20 shows the vacancy rates for Class A space and the combined B and C space in downtown and the suburbs for 2019-2024 (Q3).

Figure A-20: GTA Office Vacancy Rates Downtown & Suburban by Building Class, 2019-2024 (Q3), Percent

Source: CBRE
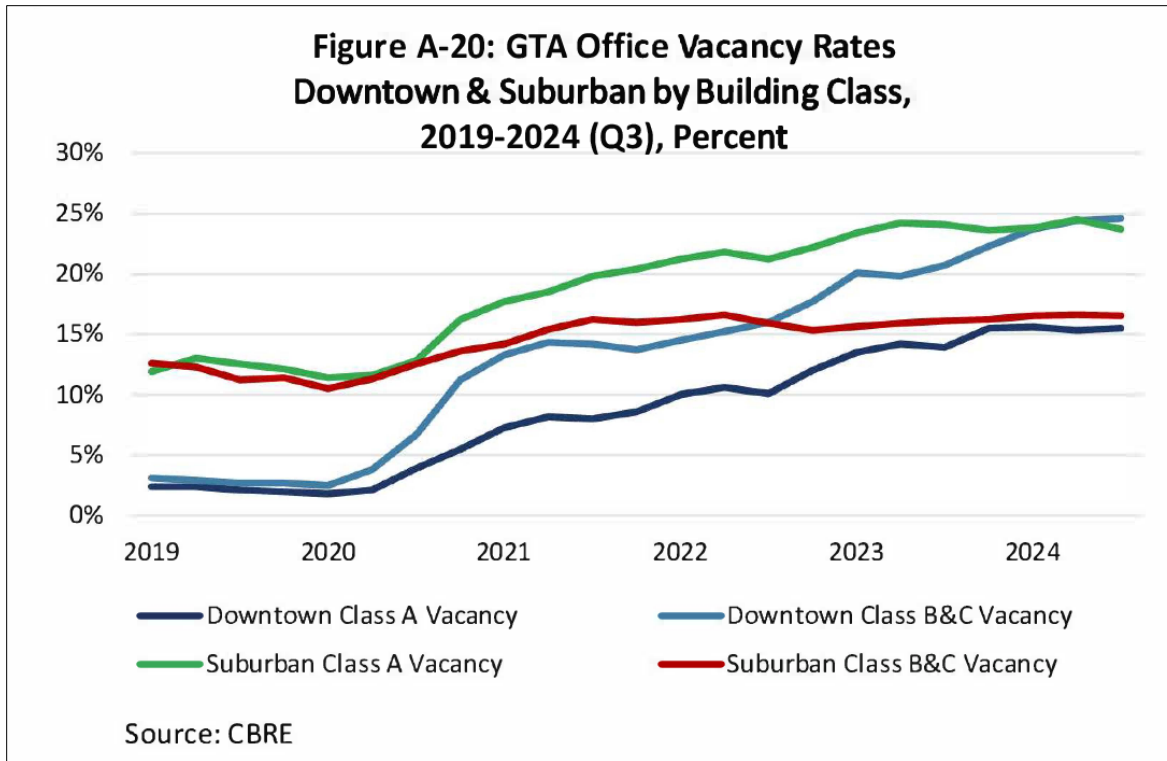
The downtown Class A space market had the lowest vacancy rate throughout the period under review, far below vacancies for Class A space in the suburbs. The vacancy rate in downtown Class B and C spaces increased much faster as tenants moved from this lower quality to new Class A space. The suburbs are the inverse to the downtown. Here, the Class B and C vacancy rate remained stable while the Class A vacancy rate climbed rapidly.

Downtown office building values have declined more than other property types since 2016

Figure A-21 plots the appraisal-based valuations of downtown office buildings and condominium sales and metropolitan-wide rental apartment building valuations since December 31, 2015. This data tracks changes since the last valuation date for property tax assessments in Ontario (January 1, 2016).

Figure A-21: Property Value Indices in the GTA and Downtown Toronto, 2015-2024*

Institutional Property Appraisals & Condo Transaction Prices

*Annual Index (December 2015 = 1.0) except for 2024 that extends through Q3.
Source: Authors based on data provided by MSCI and contained in the MSCI/REALPAC Canadian Property Index and data from the Toronto Real Estate Board (Marketwatch Reports).

All three property types had increasing values between 2015 and 2021, with the condominium and rental apartment buildings outpacing office buildings. After 2021, condominiums and office buildings experienced drops in valuations, with downtown office buildings declining by 18% and condominiums by 10%.

If a general reassessment of current property values were to occur now, there would be a shift in the share of property taxes paid away from office buildings to other types of properties, including rental apartments and single-family dwellings.

Population and Housing

The downtown accounted for a large share of Toronto's population growth during 2016-2021

Figure A-22 presents the total population of the downtown in 2016 and 2021 and the growth between these years. The data are from the Census of Canada.

Figure A-22: Total Population, Downtown Toronto, 2016 and 2021, Persons (000s)

Source: Census of Canada.
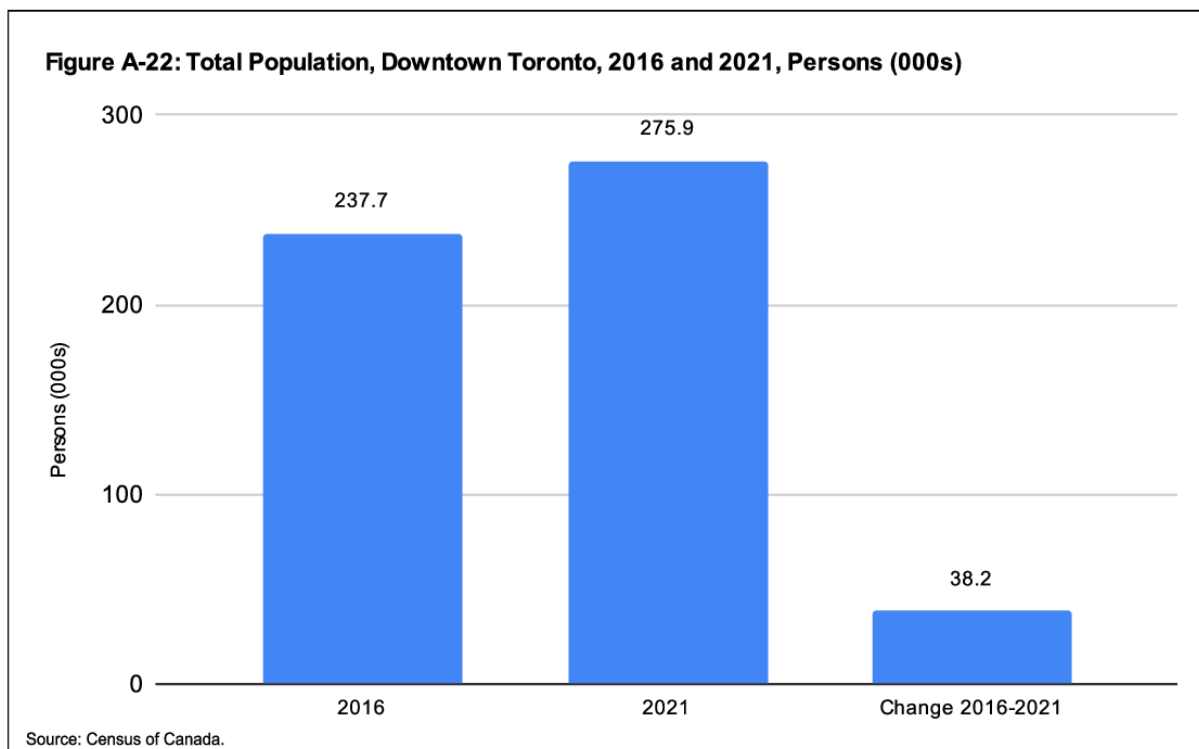
The downtown population continued to grow rapidly between 2016 and 2021. The growth of 38,200 persons was about the same as in the previous five years (see Figure A-9). The majority of Toronto's population growth occurred in the downtown - 61% of the city's growth in 2016-2021.

The large number of housing units under construction means plenty of short-term population growth in the downtown

Figure A-23 presents the number of housing units under construction in downtown Toronto and as a percentage of the entire city for 2016 to 2024 (January-November). Virtually all units are suites in high-rise apartment buildings.

Figure A-23: Housing Units Under Construction, Downtown Toronto and as Percent of City, 2016-2024 (Jan-Nov)

YTD - Jan-Nov

Source: CMHC Starts and Completion Survey.
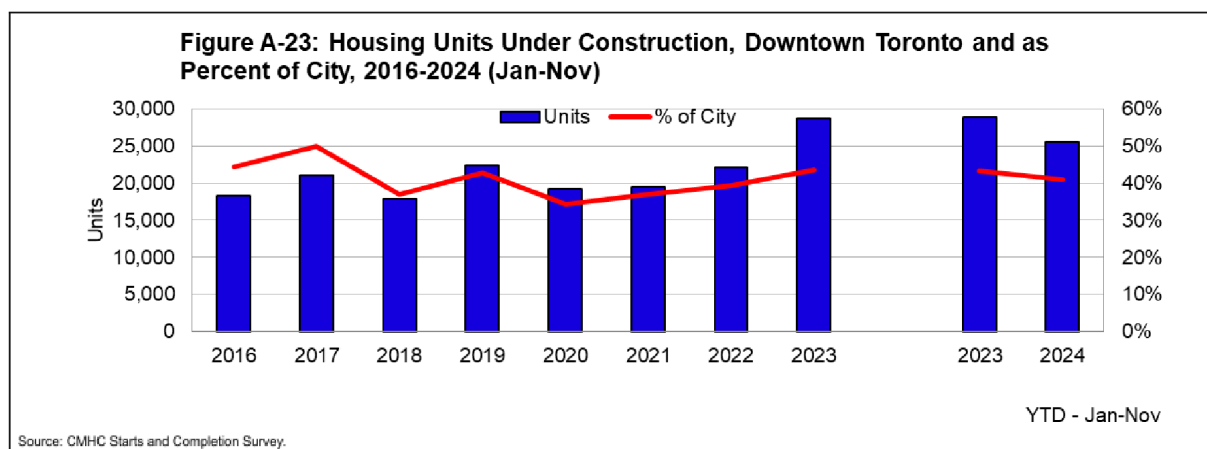
The number of housing units under construction has been extremely high over the entire period, averaging between 18,000 and 22,000. However, in 2023, the number of units surged. At that time, the downtown area accounted for over 40% of all new housing under construction in the city.

Toronto's new condominium apartment market is now oversupplied, with high completions, demand from investors, and intended owner-occupants weak. Over time, the supply will diminish, and demand will pick up.

Population growth will continue in downtown areas with the large volume of apartments under construction. Environics Analytics forecasts the population of an area within two kilometres of the Yonge and College intersection will increase to 267,561 persons in 2026 from 221,334 persons in 2021.

Retail sales – the Eaton Centre

Figure A-24 shows the average sales per square foot of retail space at the Eaton Centre in 2019 and 2023 and selected other shopping centres across Canada. The Eaton Centre is the most significant shopping node in downtown Toronto.

Figure A-24: Average Sales Per Square Foot for Top Five Shopping Centres in Canada, 2019 and 2023			
Ranking	**Name**	**Location**	**Sales Per Sq. Ft.**
2019			
1.	Yorkdale Shopping Centre	Toronto	$1,964
2.	CF Pacific Centre	Vancouver	$1,865
3.	CF Toronto Eaton Centre	Toronto	$1,542
4.	Park Royal	West Vancouver	$1,342
5.	Southgate Centre	Edmonton	$1,121
2023			
1.	Yorkdale Shopping Centre	Toronto	$2,402
2.	CF Toronto Eaton Centre	Toronto	$1,457
3.	CF Pacific Centre	Vancouver	$1,324
4.	CF Richmond Centre	Richmond	$1,323
5.	CF Chinook Centre	Calgary	$1,308

Sources: Retail Council. "Canadian Shopping Centre Study 2019." and Craig Patterson. "Canada's Top Shopping Centres by Sales Per Sq. Ft." Retail Insider. April 30, 2024.

The Eaton Centre was third in sales productivity across Canada in 2019, moving up to second in 2023. Only the Yorkdale Shopping Centre surpassed the Eaton Centre in both years.

Sales per square foot declined between the two years in the Eaton Centre (downtown Toronto) and the Pacific Centre (downtown Vancouver). In contrast, sales per square foot increased for the Yorkdale Shopping Centre between 2019 and 2023.

Top Local Issues Today in the City of Toronto

Recent surveys of Toronto residents provide feedback on what issues or problems they consider most critical in the city. While city-wide in scope, the feedback typically applies to the downtown area, given its essential role.

Figure A-25 is based on responses to an IPSOS survey conducted for the City of Toronto in the summer of 2024. Respondents were asked what was the most important "local" or "municipal" issue they felt should receive the greatest attention from local leaders in the city.

Figure A-25: Top Local Issue Today in the City of Toronto, Summer 2024, % of Respondents

Question: What is the most important "local" or "municipal" issue you feel should receive greatest attention?
Source: Ipsos. Listening to Toronto Survey 2024. A survey conducted for the City of Toronto.
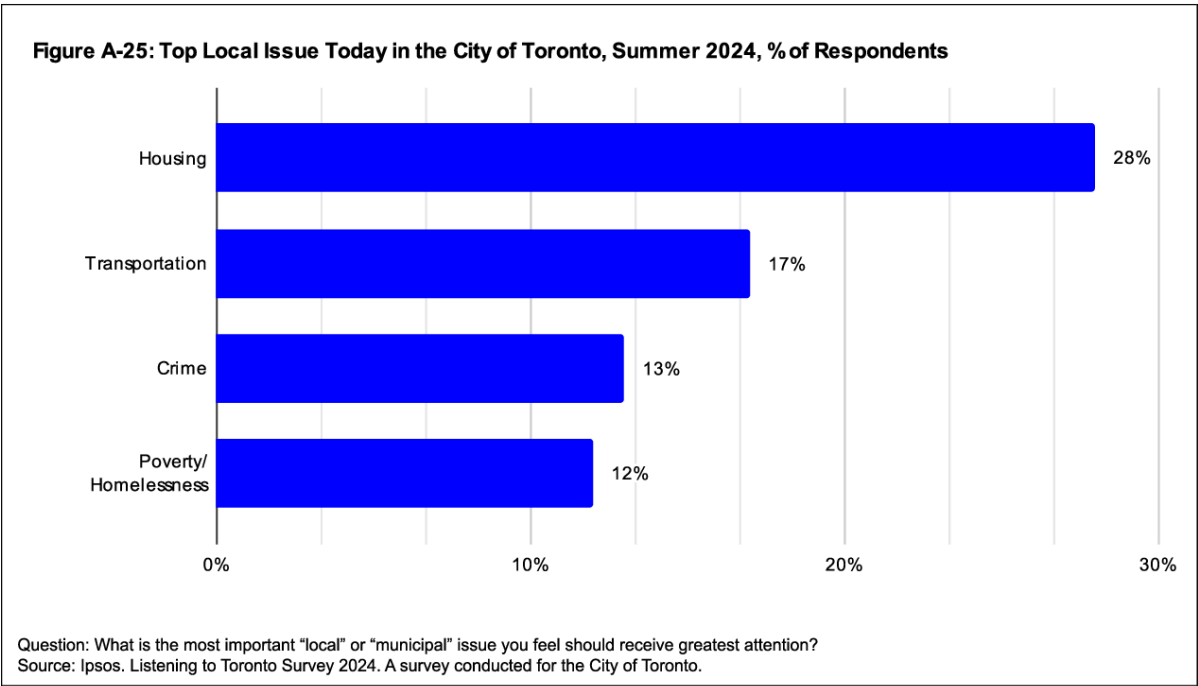
Housing (e.g. cost of housing, affordability, assisted housing) was the top local issue for 28% of respondents. Transportation (i.e. congestion, travel times, TTC) was the second top issue (17%), followed by crime (13%) and poverty/homelessness (12%).

Figure A-26 shows responses by city of Toronto residents to a Focus GTA survey conducted by Environics Analytics in the fall of 2024. They responded to the question: what, in your opinion, is the single most important local problem facing the city of Toronto today?

Figure A-26: Most Important Issue Today in the City of Toronto, Fall 2024, % of Respondents

Issue	%
Increased Cost of Living	19%
Lack of Affordable Housing	18%
Traffic / Road Congestion	9%
High Taxes	8%
Poverty / Homelessness	8%

Question: What, in your opinion, is the single most important local problem facing the City of Toronto today?
Source: Environics Research. Focus GTA: Insights from GTA Residents. Fall 2024.
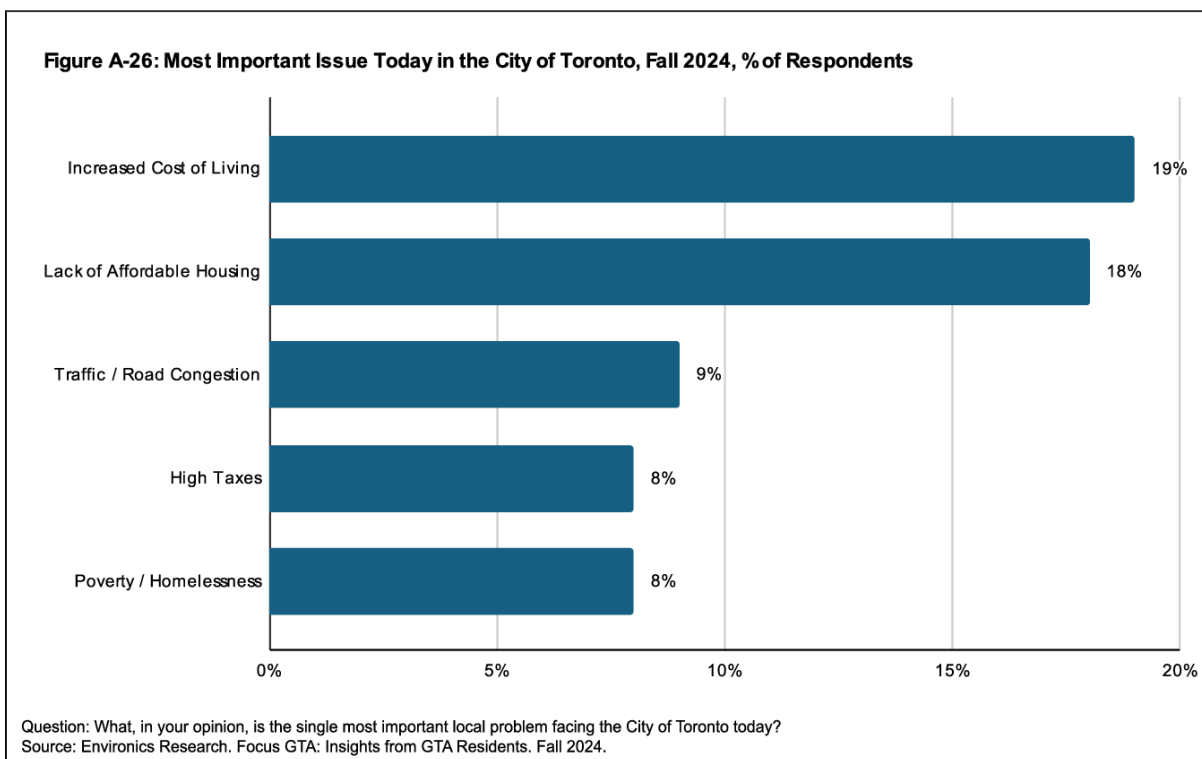
The increased cost of living (including the cost of gas and vehicle insurance) was the most important problem (19% of respondents), followed closely by the lack of affordable housing (18%). The third-ranked problem was traffic/road congestion (9%), followed by high taxes and poverty and homelessness (both at 8%). Crime, law and order was the most important problem for 5% of respondents and inadequate public transit for 1% (not shown).

Abacus Data conducted a third survey of Toronto's top issues today for the Toronto Police Association in January 2024. The survey asked respondents to pick the three top issues facing Toronto today, unlike the previous two surveys which asked respondents to identify a single top issue (see Figure A-27).

Figure A-27: Top Issues Facing the City of Toronto Today, % of Respondents

Issue	Percentage
Housing Accessibility	52%
Local Economy/Affordability	41%
Homelessness	40%
Crime and Public Safety	34%

Question: Now from the list below, what are the top 3 issues facing Toronto today?
Source: Abacus Data survey for the Toronto Police Association, January 2024
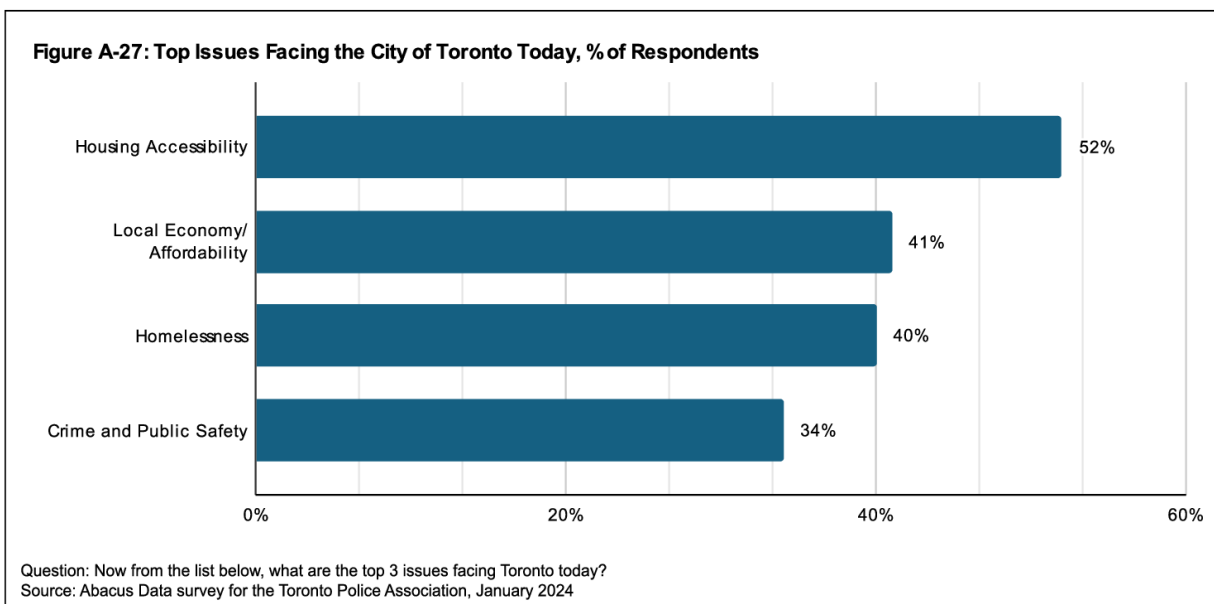
Housing accessibility (mentioned by 52% of respondents) was the top issue, followed by the local economy and affordability (41%). Homelessness (40%) and crime and public safety (34%) were the third and fourth top issues mentioned. 22% and 15% of the respondents mentioned traffic congestion and public transit, respectively (not shown).

Perceptions of Downtown Toronto – Downtown Workers, Residents and Visitors

In 2023, the Gensler Research Institute conducted a global survey of 26,007 residents in 54 cities about the future of the central business district (what we call the downtown).[8] Three groups of residents were surveyed: downtown residents, downtown employees and local visitors (city residents living outside the downtown).

The majority of respondents feel downtown Toronto provides a great experience

The survey found that 69% of the city of Toronto respondents agreed that the downtown provides a great experience (Figure A-28). While it was lower than the 76% of global respondents, it is positive that more than two-thirds of Toronto respondents agreed with this statement. Toronto's percentage may be lower because its amalgamated boundaries include postwar suburban municipalities, which many other central cities do not.

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[8] Gensler Research Institute. "City Pulse 2023: The Future of Central Business Districts". The boundaries of the Toronto CBD are not provided, but they are likely similar to the "downtown," as delineated in this report, excluding areas north of Bloor Street. Details of the Toronto sample are not provided. Qualtrics surveyed 26,007 urban residents in 54 cities for an average of 491 residents per city.

Figure A-28: Percentage of Respondents Who Agree That Their Downtown Provides a Great Experience, Selected Cities, 2023*

City	Percentage
Tokyo	48%
Seattle	64%
Toronto	69%
San Francisco	70%
Vancouver	70%
Los Angeles	73%
Chicago	77%
New York	80%
London	81%
Boston	84%

*The source report refers to Central Business District (CBD) which is called 'Downtown' here.
Source: Gensler Research Institute. City Pulse 2023: The Future of Central Business Districts

Residents rate the downtown high for many activities

The downtown also scored high on most activities in the Gensler survey, including working, dining/eating out, shopping, seeing performances/exhibits, working, discovering new things, and having fun (Figure A-29). Where it lagged in the ratings was as a place to live and especially as a place to raise children.

Figure A-29: How Would You Rate The Following Activities In Your Downtown, City of Toronto, 2023, Percent of Responses*

Activity	Percentage
Start a family	16%
Raise children	19%
Live	46%
Meet people	60%
Discover new things	69%
Have fun	71%
Work	72%
See performances/exhibits	73%
Shop	76%
Dine/eat out	79%

*The source report refers to Central Business District (CBD) which is called 'Downtown' here.
Source: Gensler Research Institute. City Pulse 2023: The Future of Central Business Districts.

Elements that would draw more Toronto residents to the downtown

The Gensler survey also included a question on which elements having a greater presence in the downtown would draw Toronto residents more often to the downtown (Figure A-30). The top four responses were safety (28%), parking (25%), the ability to discover new things (25%) and parks (21%).

Figure A-30: I Would Go To My Downtown More Often If There Were More…, City of Toronto, 2023, Percent of Responses*

Category	Percent
Accessibility	9%
Store variety	12%
Walkability	12%
Family activities /events	13%
Restaurants,cafes, and bars	14%
Culture/events	15%
Parks	21%
Ability to discover new things	25%
Parking	25%
Safety	28%

*The source report refers to Central Business District (CBD) which is called 'Downtown' here.
Source: Gensler Research Institute. City Pulse 2023: The Future of Central Business Districts.

A listing of the anchor destinations is contained in a recent report dealing with unlocking the waterfront's potential. These include Billy Bishop Toronto City Airport, St. Lawrence Market, the CN Tower, sports and music venues and public spaces like Sugar Beach and Love Park.[9]

Commuting and Transit

A pandemic-induced shift in commuter travel modes to cars has only partially reversed

Figure A-31 shows commuting by modal patterns for the Toronto census metropolitan area (CMA) for selected years from 2016 to 2024.

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[9] Toronto Region Board of Trade. "Ripple Effect: Unlocking Toronto's Waterfront Potential." Sponsored by Waterfront BIA. May 2024.

Figure A-31: Main Mode of Commuting, Toronto Census Metropolitan Area, May 2016-May 2024, Percentage Distribution

Source: Statistics Canada.
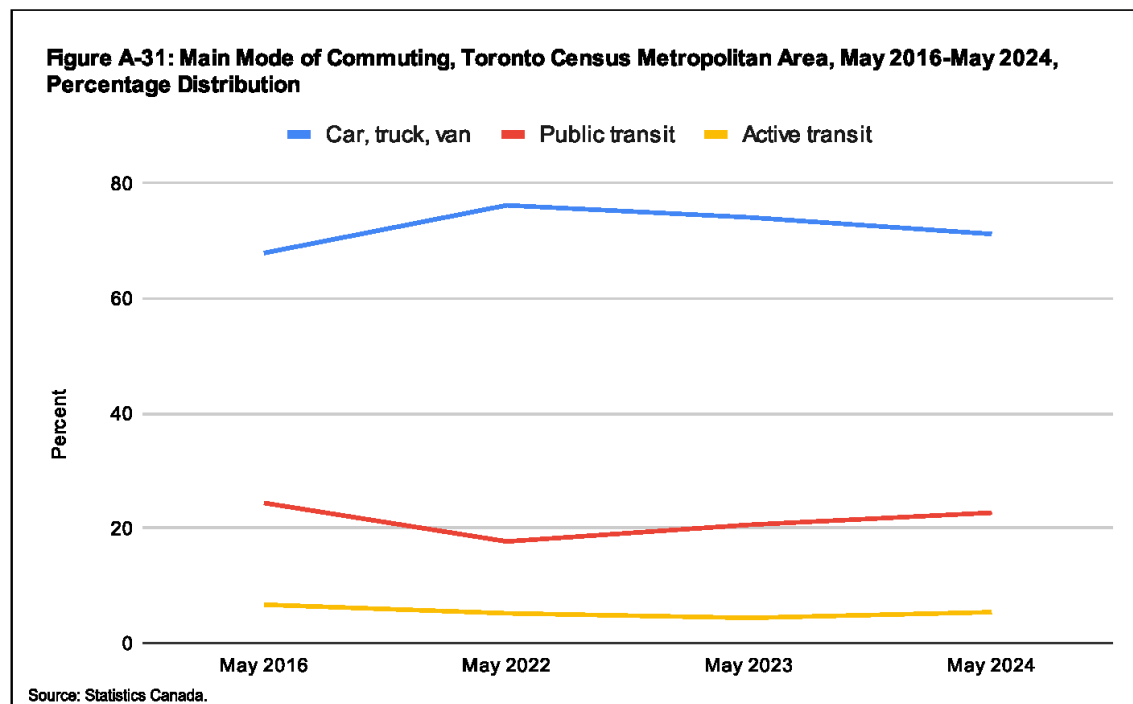
There was a marked shift away from public transit during the pandemic, which fell from 24.4% of commuting trips in mid-2016 to 17.7% in mid-2022 in favour of cars, trucks or vans, which climbed from 67.9% to 76.3%. During the last two years, the share of trips by public transit has climbed to 22.7%, and trips by car, truck or van have fallen correspondingly.

The mid-2024 modal split compared to mid-2016 showed the public transit share being roughly 1.7 percentage points lower.

Almost three-quarters of downtown commuters live in the city of Toronto

Figures A-32 and A-33 present data from the 2016 and 2022 Transportation for Tomorrow Surveys. These surveys obtained detailed information on households, demographics, and trip details, including origin, destination, travel mode, purpose and time of day.

Figure A-32 shows downtown commuters by where they lived in 2016 and 2022.

Figure A-32: Commuting Trips to Downtown Toronto by Area, All Modes, 2016 and 2022, Thousands of Trips (000s)

Source: Transportation Tomorrow Survey. Provided by Transportation Policy and Analysis, Development and Growth Services and Planning Research & Analytics, Toronto City Planning.
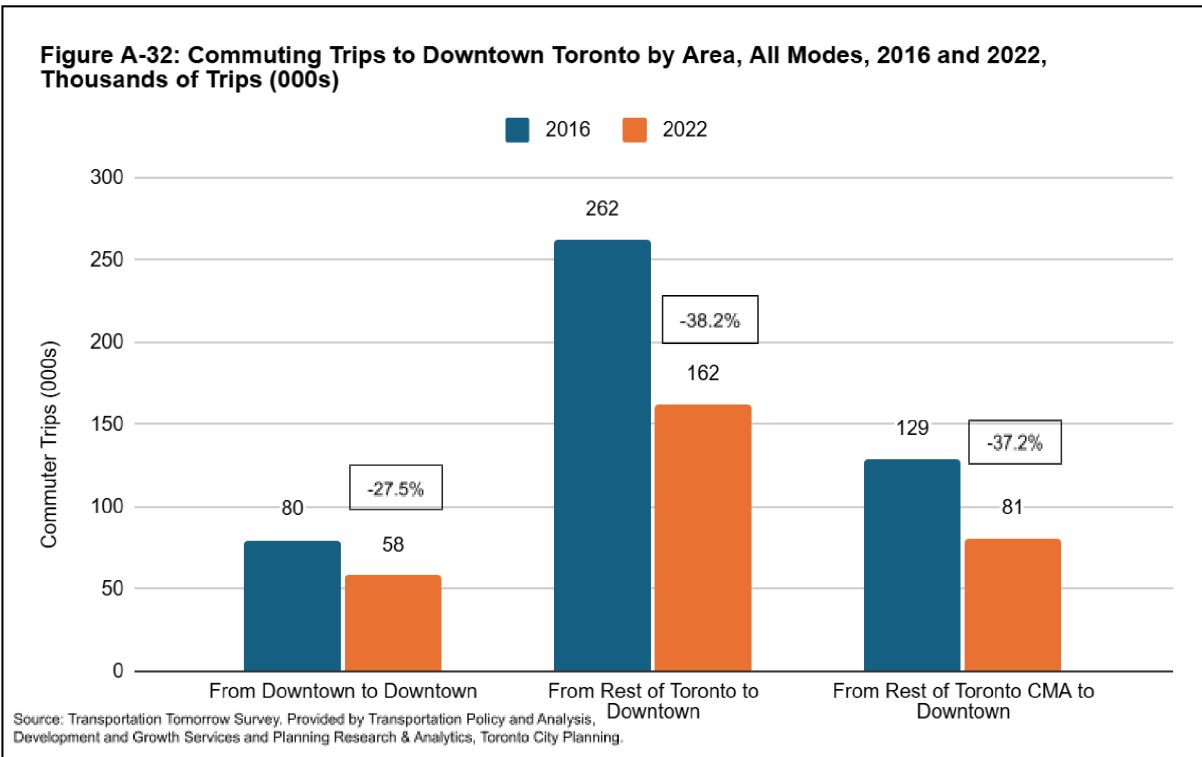
In both years, nearly three-quarters of commuters to the downtown resided in the city of Toronto.

Commuter transportation modes to downtown vary according to place of residence

Figure A-33 presents data on the travel mode of downtown commuters by area of residence in 2016 and 2022.

Figure A-33: Commuting Trips to Downtown Toronto by Area and Mode, 2016 and 2022, Percent						
	From Downtown to Downtown		From Rest of Toronto to Downtown		From Rest of Toronto CMA to Downtown	
	2016	2022	2016	2022	2016	2022
TTC	26%	28%	64%	60%	17%	14%
GO	0%	0%	4%	3%	52%	36%
Automobile	7%	7%	22%	24%	30%	49%
Walk	57%	51%	4%	4%	1%	1%
Cycle	8%	12%	6%	8%	0%	0%
All Other	2%	3%	1%	2%	0%	0%
Total	100%	100%	100%	100%	100%	100%

Source: Transportation Tomorrow Survey. Provided by Transportation Policy and Analysis, Development and Growth Services and Planning Research and Analytics, Toronto City Planning.

In general, downtown commuters living in the downtown walk or take the TTC to work. Commuters from elsewhere in the city rely heavily on the TTC, followed by driving. Commuters living in other parts of the Toronto CMA utilize GO Transit or drive to the downtown.

Shifts in travel modes between 2016 and 2022 include:

- Relatively fewer downtown commuters walked (51% vs 57%) and more cycled (12% vs 8%);

- Commuters living in other parts of the city took TTC somewhat less (60% vs 64%) and drove a car or biked more (each up by two percentage points);

- A marked shift occurred among commuters living elsewhere in the Toronto CMA from transit (especially GO) in favour of driving.

TTC passenger counts are improving but still lagging pre-pandemic

Figure A-34 provides annual passenger counts for the TTC by mode from 2016 to 2024 (January-September). Trips to and from the downtown area are common destinations for subway riders.

Figure A-34: TTC Ridership by Mode, City of Toronto, 2016-2024 (Q3), Passengers (Millions)

Source: American Public Transportation Association, Ridership Reports 2016-2024 Q3.
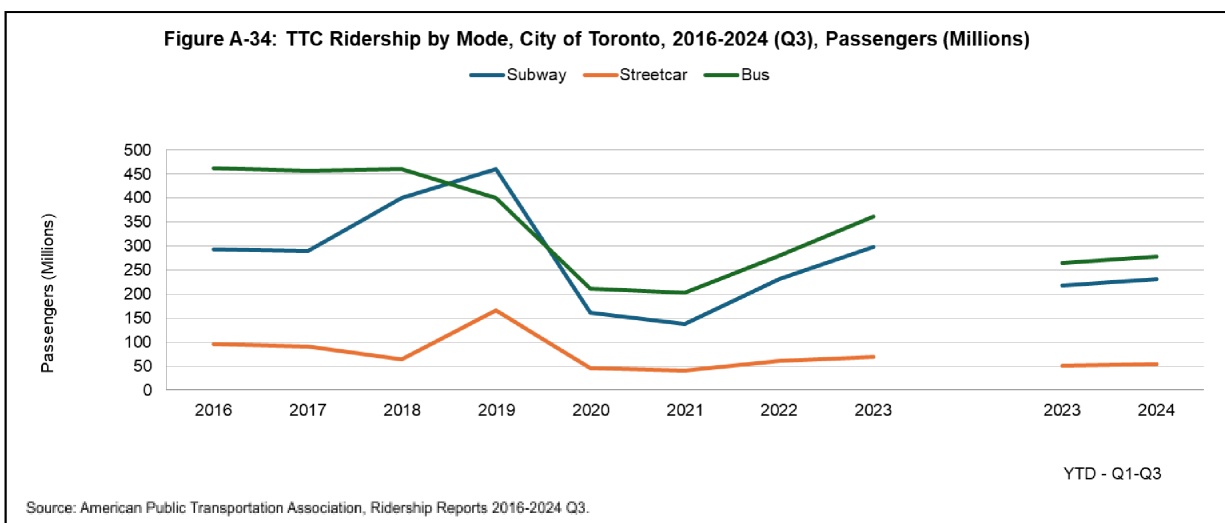
There had been a surge in subway riders in 2018 and again in 2019, which abruptly collapsed after the pandemic hit in early 2020. All three transit modes have been increasing since reaching a nadir in 2021. However, none of the modes have reached the previous 2019 passenger volumes.

The TTC CEO's November/December 2024 Report provided interesting data on downtown subway usage, highlighted in Figure A-35.

Figure A-35: Average Weekday Downtown Toronto Subway Station Usage (Entries and Exits)		
	Year-Over-Year Change (September 2023 - September 2024)	% of Pre-Pandemic Levels
Downtown Overall	+10%	83%

Source: CEO's Report, Toronto Transit Commission, November/December 2024

Average weekday customer boardings for all the downtown subway stations were up 10% between September 2023 and September 2024. This brought boardings back up to 83% of pre-pandemic levels. The CEO's Report asserts a clear relationship between downtown transit demand and office commute rates. According to the Report, the average downtown commute rates have increased from 2.5-3.0 days per week in September 2023 to 3.0-3.5 days per week a year later.[10]

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[10] Toronto Transit Commission. "CEO's Report." November/December 2024. P. 10.

GO passenger counts declined even more than the TTC

Figure A-36 presents GO Transit train and bus service ridership from 2016 to 2024 (January-September). The ridership statistics cover the entire GO network, but trips to and from Union Station account for the biggest ridership share.

Figure A-36: GO Transit Ridership, 2016-2024, Passengers (Millions)

Source: American Public Transportation Association, Ridership Reports 2016-2024 Q3.
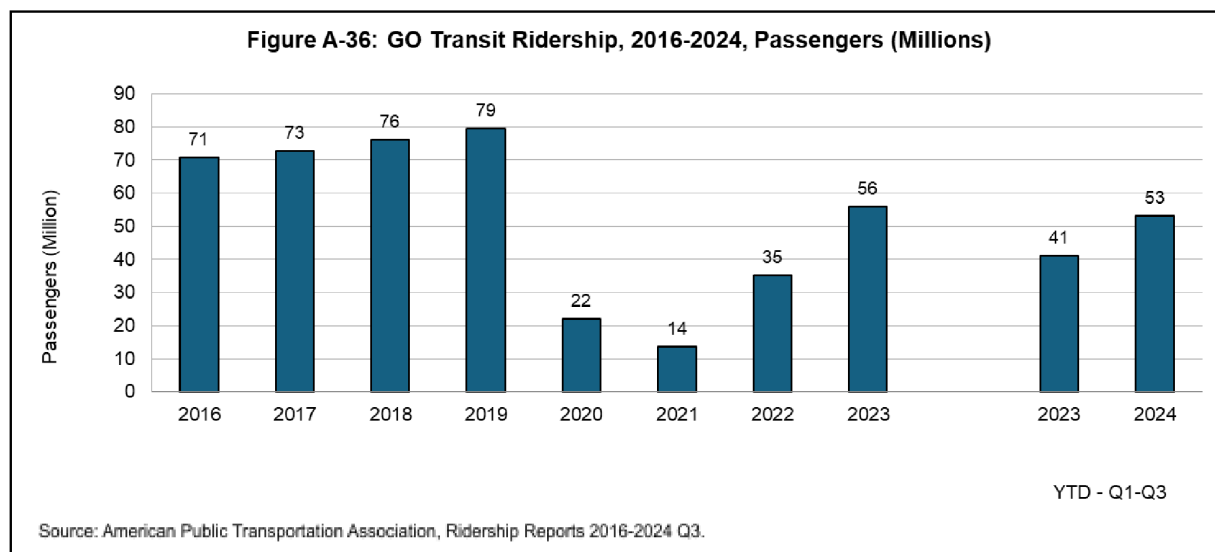
Like subway ridership, demand for GO services was increasing before the pandemic. Demand plummeted in 2020 and fell yet again in 2021. Since 2022, demand has grown, but the latest ridership figures remain short of 2019.

Slippage in satisfaction with the TTC but not GO

The TTC and GO Transit regularly survey customers to determine service satisfaction. Figure A-37 shows the responses from 2019 to the first half of 2024.

Figure A-37: Customer Satisfaction in TTC and GO Transit by Riders, 2019-2024, % of Respondents*

*Customers are surveyed on how satisfied they were overall with the quality of the GO Transit and TTC's services respectively.
**Data pertains to the 12 months ending March of each year.
Source: TTC CEO Report and Metrolinx Annual Reports.
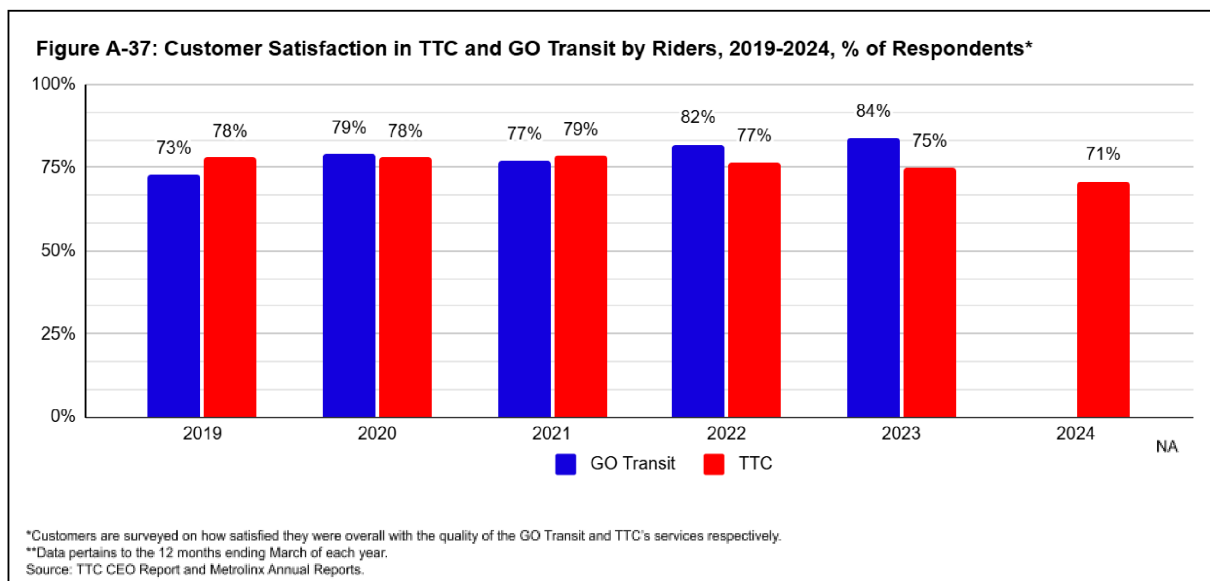
There has been a deterioration in TTC satisfaction starting in 2022, which continues into the first half of 2024. In contrast, satisfaction with GO service climbed in 2022 and again in 2023.

More Torontonians feel roads are in greater need of maintenance and improvement than transit

Figure A-38 shows responses to a question on the Environics Analytics' Focus GTA survey about the need for better maintenance and improvement of the road and transit infrastructure for 2019 to 2024.

Figure A-38: Percentage of Toronto Respondents Stating Transit and Road Infrastructure is the Infrastructure Most in Need of Maintenance and Improvement, City of Toronto, Fall 2019-2024
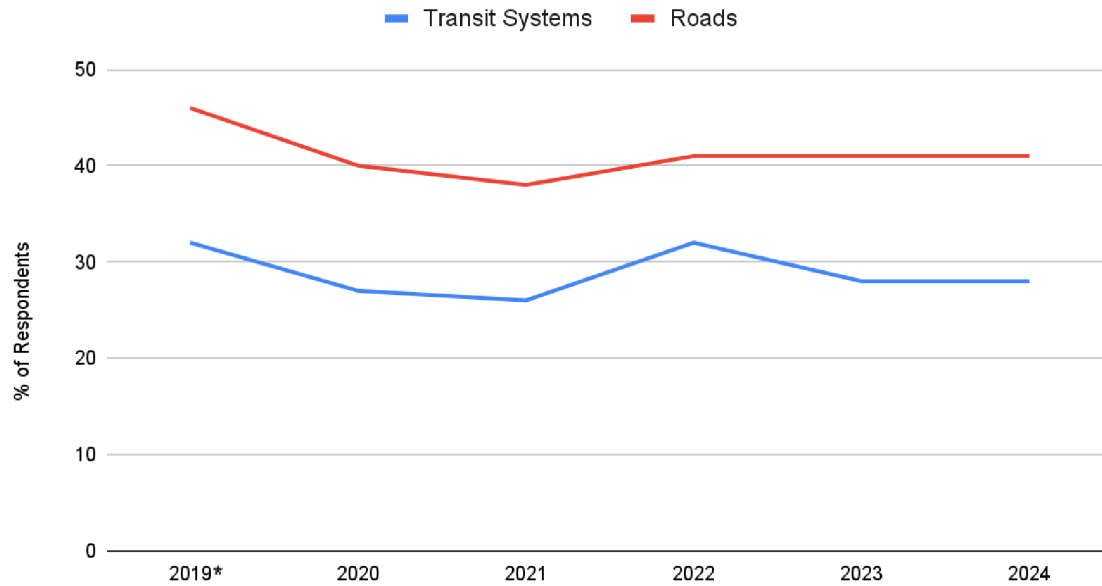
* Summer 2019
Source: Environics Research. Focus GTA. Special tabulations.

Over the 2019-2024 period, more respondents felt that road infrastructure needed more maintenance and improvement than transit.

Reasonable and timely access to the downtown - the problem of congestion

The growth in population and employment is causing traffic congestion to be a growing problem throughout the Toronto CMA. It is aggravated by road and lane closures, which are especially prevalent downtown. The issue of road congestion is increasingly a topic of discussion in Toronto.

Toronto ranks relatively high globally in the severity of its congestion problem, according to INRIX

Reviewing congestion in Toronto (the census metropolitan area) compared to other larger cities is informative. Figure A-39 presents the latest traffic data for Toronto from INRIX. The primary INRIX ranking (Impact Rank) is based on the severity of congestion (hours lost) weighted by city size. An urban area is akin to a census metropolitan area.

Figure A-39: Toronto Urban Area's Ranking Based on the Severity of Drivers' Congestion (Hours)	
	Ranking*
Toronto Urban Area's Congestion Ranking Among the 25 Most Congested Urban Areas	2022 = 21 2023 = 17
Delay Per Drive Hours	***2023 = 63 hrs***
Change from 2022	+21%
Change from Pre-COVID (2019)	+3%
Downtown Speed	11 mph

* The lower the ranking the more the congestion.

Source: INRIX. "2023 INRIX Global Traffic Scorecard with Q1 2024 Update." June 2024.

In 2023, Toronto ranked 17th in congestion severity among 25 global cities with the most severe congestion, with the 2023 delay per driver estimated at 63 hours. Toronto ranked behind New York (101 hours), London (99 hours), Paris (97 hours), Chicago (96 hours), Los Angeles (89 hours) and Boston (88 hours).

Toronto's congestion worsened relative to the other cities as it moved from 21st in 2022 to 17th in 2023.

Looking at INRIX's only data for downtowns, the speed for drivers in downtown Toronto was 11 miles per hour in the first quarter of 2024, down by 5% from the same quarter in 2023.[11] Four urban areas (London, Paris, Boston, and Brussels) had lower speeds (10 hours per hour), and four areas had the same speed as Toronto (New York, Chicago, Philadelphia, and Washington). Los Angeles (19 miles per hour), Houston (17 miles per hour), and Atlanta (16 miles per hour) all had estimated downtown speeds much higher than Toronto).

Downtown Toronto congestion levels have surpassed pre-pandemic levels

The City of Toronto tracks changing congestion levels within the city using the Travel Time Index metric. The index compares actual travel times against free-flow travel times (e.g. overnight).

Figure A-40 shows the downtown's PM Peak Travel Time (5-6 p.m.) from February 2020 to October 2024.

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[11] Downtown speed: The speed at which a driver can expect to travel one mile into the central business district during AM peak hours.

Figure A-40: Downtown PM Peak Travel Time Index
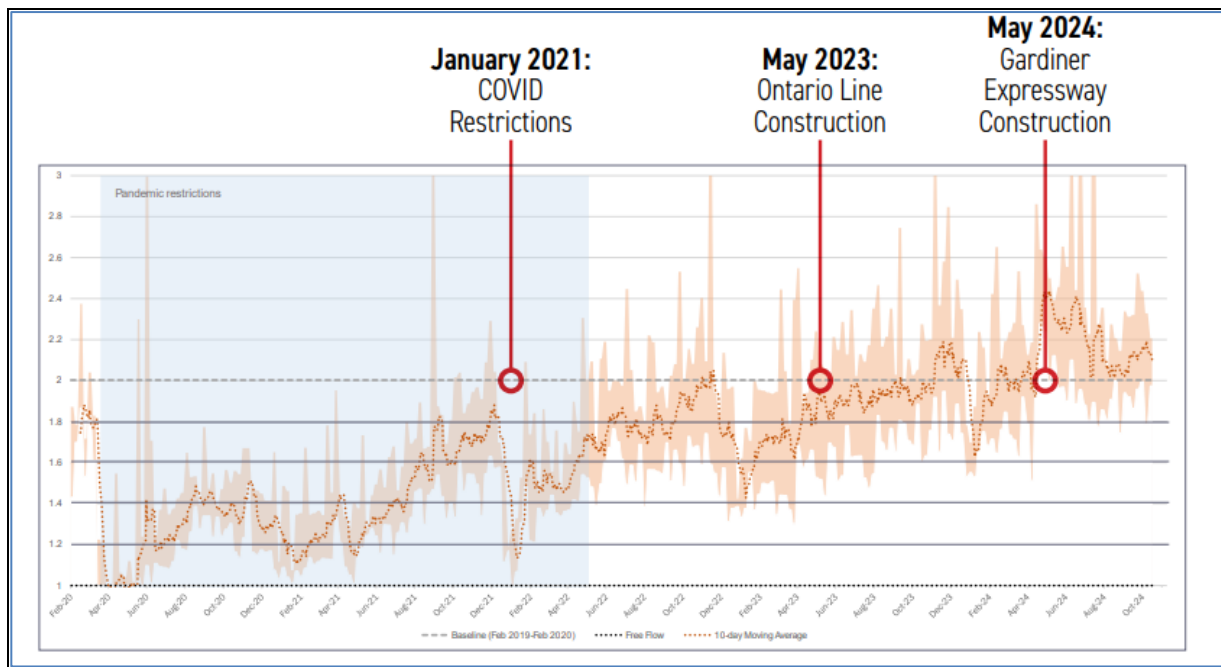
According to the City, downtown congestion levels have surpassed pre-pandemic levels largely due to significant construction, special events and population growth. To this, we would add the conversion of traffic lanes to bike lanes on arterial roads and a pandemic-inspired modal shift to automobiles away from transit as contributing factors. In contrast, city-wide congestion levels have recovered to approximately the same as pre-pandemic levels, according to the city's analysis.

Bike Share Toronto has climbed every year since 2016

Figure A-41 shows Bike Share Toronto's downtown trips from 2016 through to the first nine months of 2024.

Figure A-41: Bike Share Trips, Downtown Toronto, 2018-2024 (Q3), Trips (000s)

Source: City of Toronto. Bike Share Toronto Ridership Data.
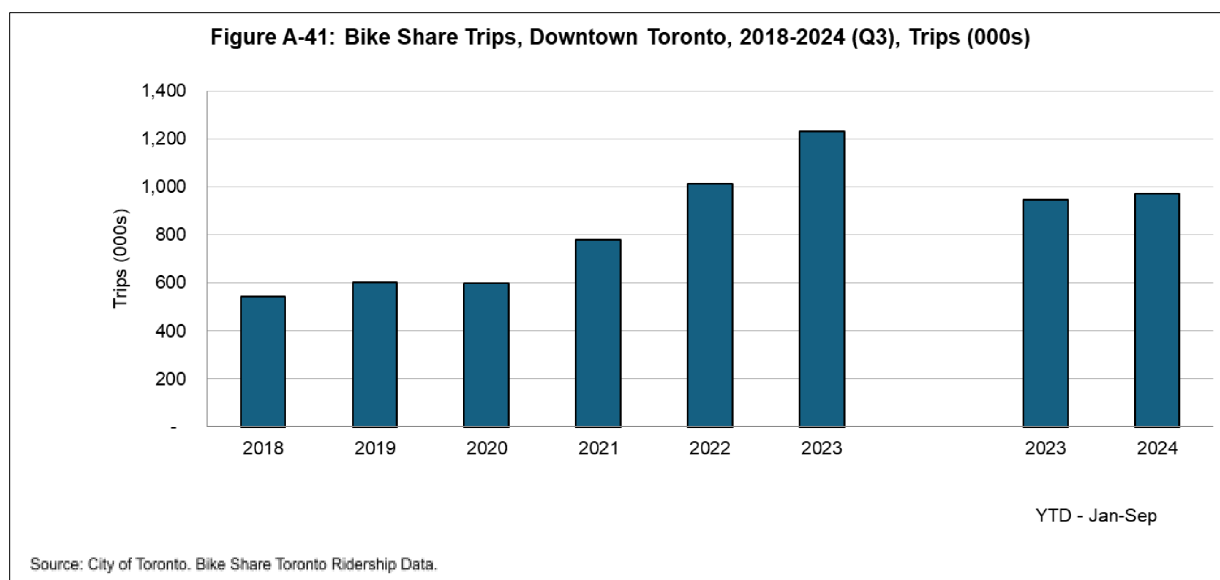
The use of bike share services surged from 2021 to 2023 and recorded more moderate growth in 2024. Most users are annual users.

Visitors to Downtown and Selected Downtown Anchors

Estimated total visitors still short of 2019

Destination Toronto regularly estimates the total number of visitors to Toronto who stay over at least one night. Estimates include international visitors and visitors from the United States and Canada.

Many of these visitors find their way downtown. Figure A-42 shows the visitor estimates for the first 11 months of 2016-2024.

Figure A-42: Total Number of Overnight Visitors, City of Toronto, 2018-2024, Persons (Millions)

Source: Destination Toronto. Accommodations Performance Summary.
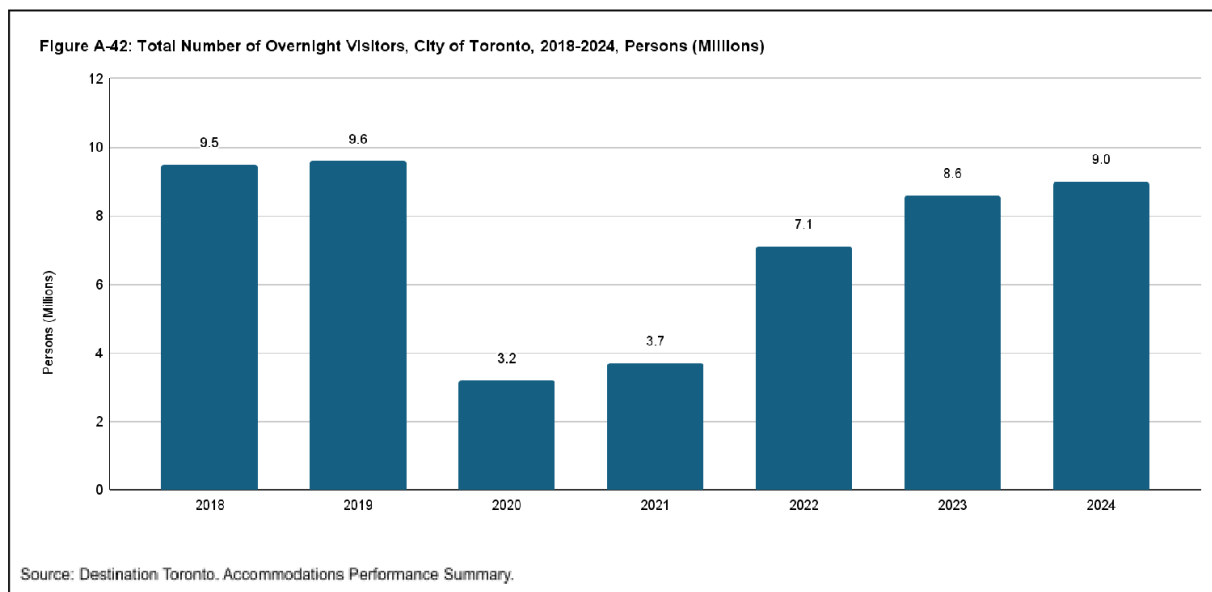
The estimated number of overnight visitors to Toronto has increased significantly from the depths reached in 2020. By 2024, 9.0 million visitors came to Toronto, although 400,000 fewer than in 2019.

The hotel market has returned to pre-pandemic conditions

Figure A-43 shows the demand for hotel rooms and the hotel occupancy rate for commercial accommodation in Toronto from 2019 to late 2024.

Figure A-43: Demand and Occupancy of Accomodations, City of Toronto, 2019-2024, Rooms (Millions)

Source: Destination Toronto. Accommodations Performance Summary.
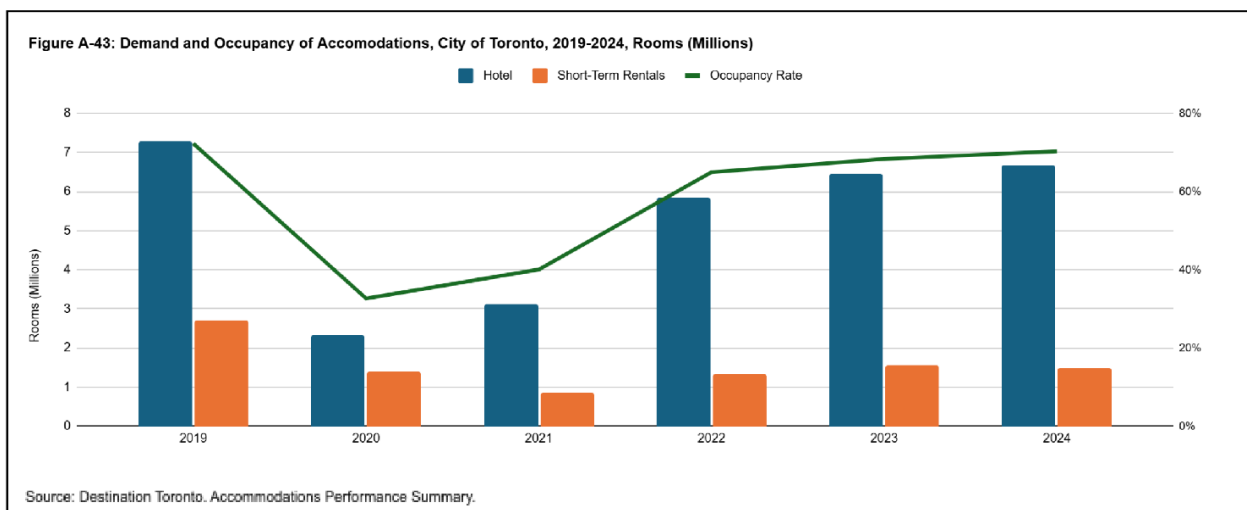
Hotel demand and occupancy rate plummeted in 2020, followed by consistent recovery over the following three years. During the first ten months of 2024, the occupancy rate averaged about 74%, indicating a strong hotel marketplace.

Island airport traffic recovery lags

Figure A-44 presents the number of passengers boarding and disembarking at the Billy Bishop Airport on the Toronto Islands from 2016 to 2024.

Figure A-44: Passenger Traffic at Billy Bishop Airport, 2016-2024, Passengers (000s)

*Estimates provided by Ports Toronto.
Source: Ports Toronto, Annual Report.
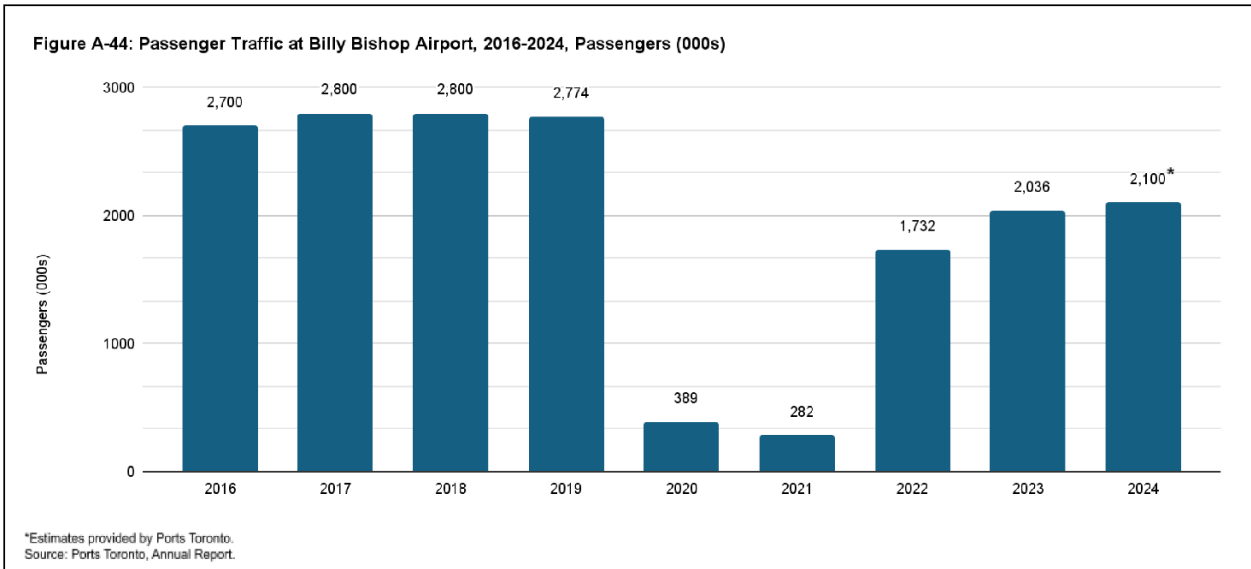
Passenger volumes collapsed in 2020 and 2021, recovering in 2022 and 2023. However, the 2024 passenger numbers remained far below 2019.

Toronto Island ferry trips recovered to pre-pandemic level

Figure A-45 shows the number of Toronto Island ferry tickets sold from 2016 to 2024 (January - November).

Figure A-45: Number of Toronto Island Ferry Tickets Sold, 2016-2024 (Millions)

Source: City of Toronto, Toronto Island Ferry Ticket Counts.
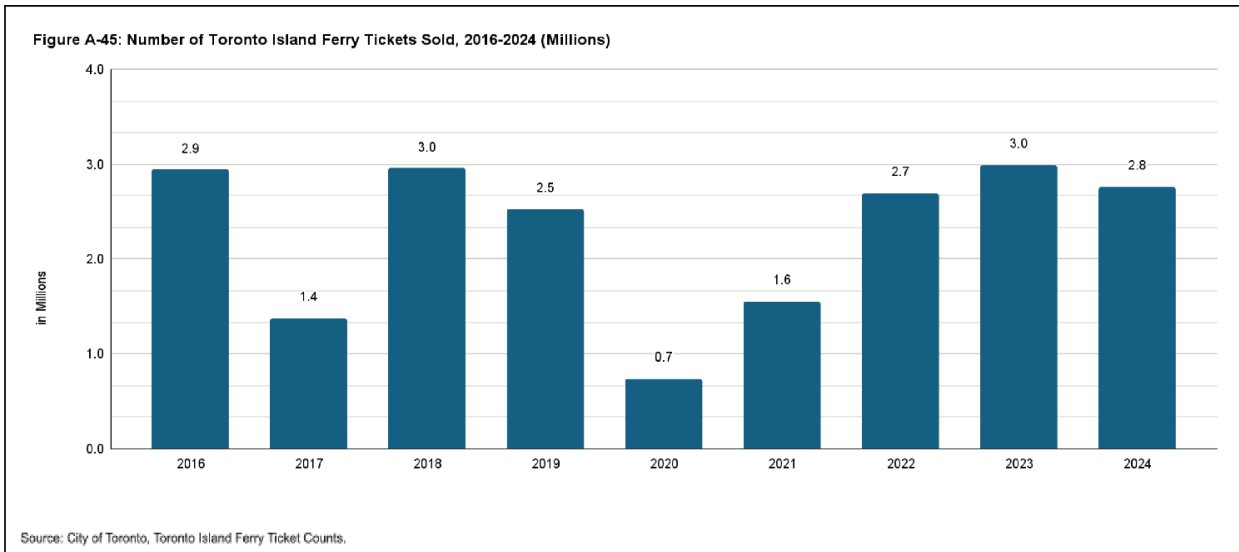
Passenger volumes have generally recovered to pre-pandemic levels, though there is volatility in the annual tickets sold.

Metro Convention Centre usage and hotel occupancies have not yet recovered

The Metro Convention Centre is a major destination for visitors to downtown Toronto. Figure A-46 shows the occupancy rate for this facility for fiscal years 2017 to 2024.

Figure A-46: Number of Events and Occupancy Rate, Metro Convention Centre, 2017-2024*

*Data pertains to the 12 months ending March of each year.
Source: Metro Toronto Convention Centre, Annual Reports.
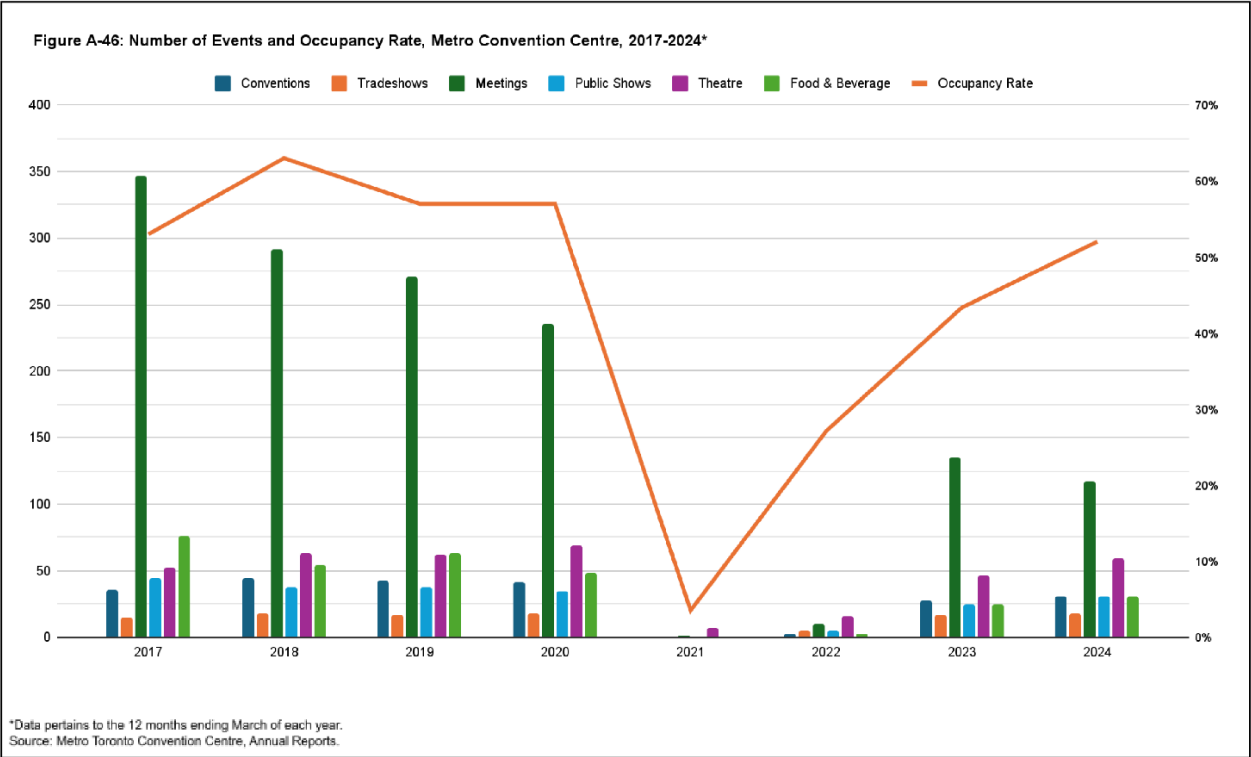
The occupancy rate remained stable in the 50%-60% range before the pandemic hit. It then plummeted in the 12 months ending in 2021 before rising over the next three years. While the occupancy rate has almost recovered to the pre-pandemic level, meetings, food and beverage events still lag the 2019 activity levels by a wide margin.

Scotiabank Centre attendance surpasses pre-pandemic levels

Figure A-47 plots the attendance for functions at Scotiabank Centre from 2017 to 2024 (the 12 months ending March of these years).

Figure A-47: Number of Attendees, Scotiabank Centre, 2017-2024, Persons (000s)

*Data pertains to the 12 months ending March of each year.
**Data not available in fiscal year 2020-2021.
Source: Scotiabank Centre, Annual Report.
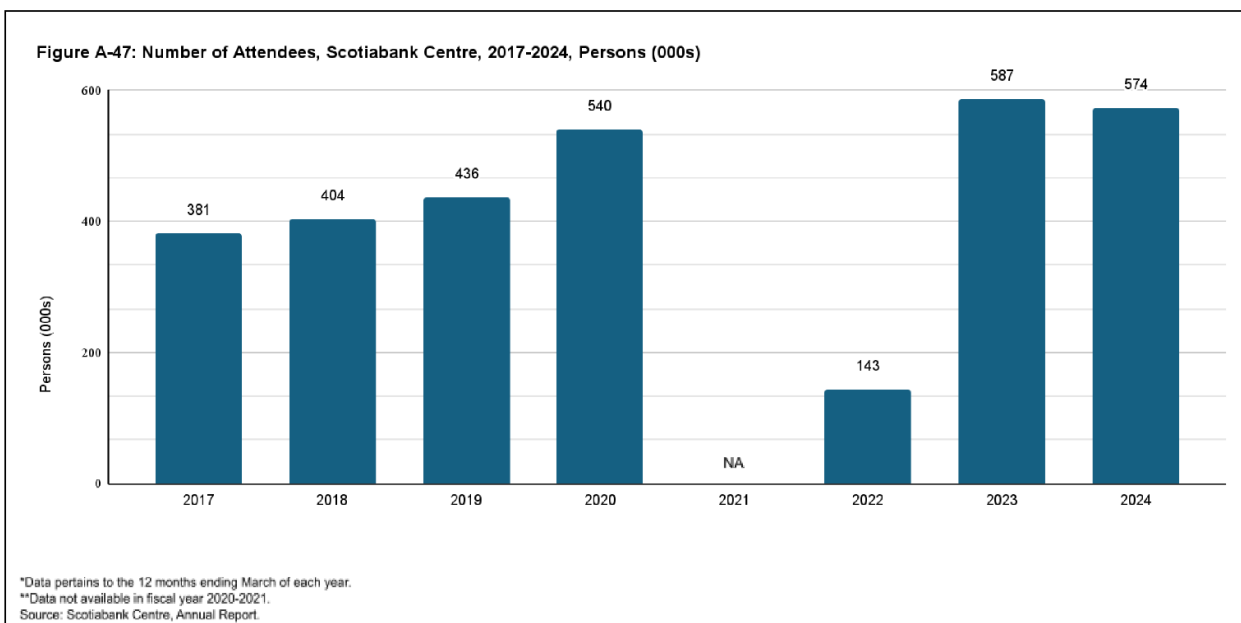
The number of attendees was increasing prior to the pandemic. However, attendees surpassed the 2019 level in 2023 and again in 2024.

Public Safety

Crime ranks third as the most important municipal issue for Toronto leaders, according to survey

The results of a survey of Toronto residents commissioned by the City recently became available. Figure A-48 lists the most important issues identified by respondents that local leaders should give the most attention to. Crime was the third-ranked most important issue mentioned by 13% of respondents. Transportation was second (17% of respondents). Housing was the top issue (28% of respondents).

Figure A-48: Survey Responses to Question: In your view, in the City of Toronto, what is the most important "local" or "municipal" issue you feel should receive the greatest attention from your local leaders?

Issue	Percentage
Housing e.g. cost of housing, affordability, assisted housing	28%
Transportation (i.e., congestion, travel times, TTC)	17%
Crime	13%
Poverty/Homelessness	12%
Cost of Living	8%
Infrastructure e.g. road maintenance	7%
Economy	7%
Healthcare	7%
Taxes	4%
Government issues e.g. support, managing spending	2%
Immigration	2%
Improving Municipal government services (i.e., garbage collection)	2%
Other issues e.g. racism, education, environment/climate	7%
Don't Know	15%

Source: Ipsos. City of Toronto 2024 Listening to Toronto survey. November 2024.

Many Toronto residents are afraid of being a victim of violence on public transit

Feeling safe on public transit is a tenet that should encourage people to utilize transit. A recent survey released by Maru Public Opinion provides insight into the public's perception regarding transit safety in the city of Toronto and the cities of Calgary, Edmonton and Vancouver (see Figure A-49).

Figure A-49: Survey Responses to Question: I am afraid of being a victim of violence on public transit, 2024, City of Toronto, September 2024, Central Cities

Legend: Somewhat Agree, Very Much Agree

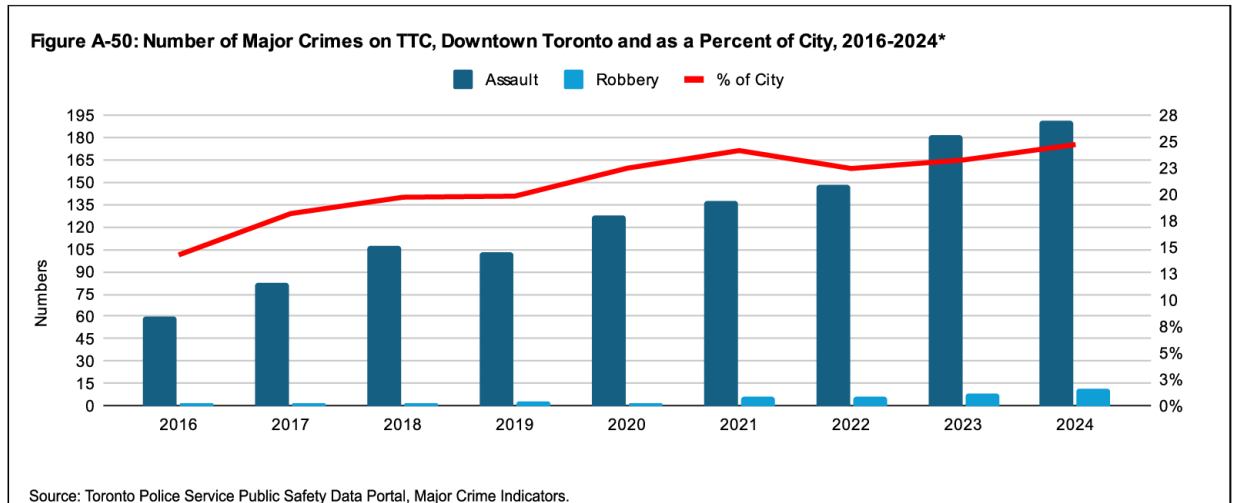| City	Total	Somewhat Agree	Very Much Agree
Toronto	64	40	24
Edmonton	75	39	36
Calgary	68	38	30
Vancouver	58	39	19

Source: Maru Public Opinion. "Perceptions on Crime and Policing." September 26, 2024

It is daunting that the majority of respondents in the city of Toronto (64%) are very or somewhat afraid of being a victim of violence on transit.[12] With a larger portion of transit trips to downtown, this is a matter of significant concern. To provide perspective, two-thirds of respondents felt very or somewhat safe walking around their neighbourhood when dark.

A bit of good news for Toronto (mainly the TTC) is that the proportion of respondents somewhat or very much agreeing that they are afraid of being a victim of violence is higher in Edmonton and Calgary. The bad news is that nearly two-thirds of Toronto residents surveyed fear being a victim of violence on public transit, with about one-quarter of all respondents very much agreeing.

Major crimes, mainly assaults, are on the rise on the TTC in the downtown

Figure A-50 plots major crimes by type (assault and robbery) reported to police on the TTC across all modes of transportation in the downtown area from 2016 to 2024.
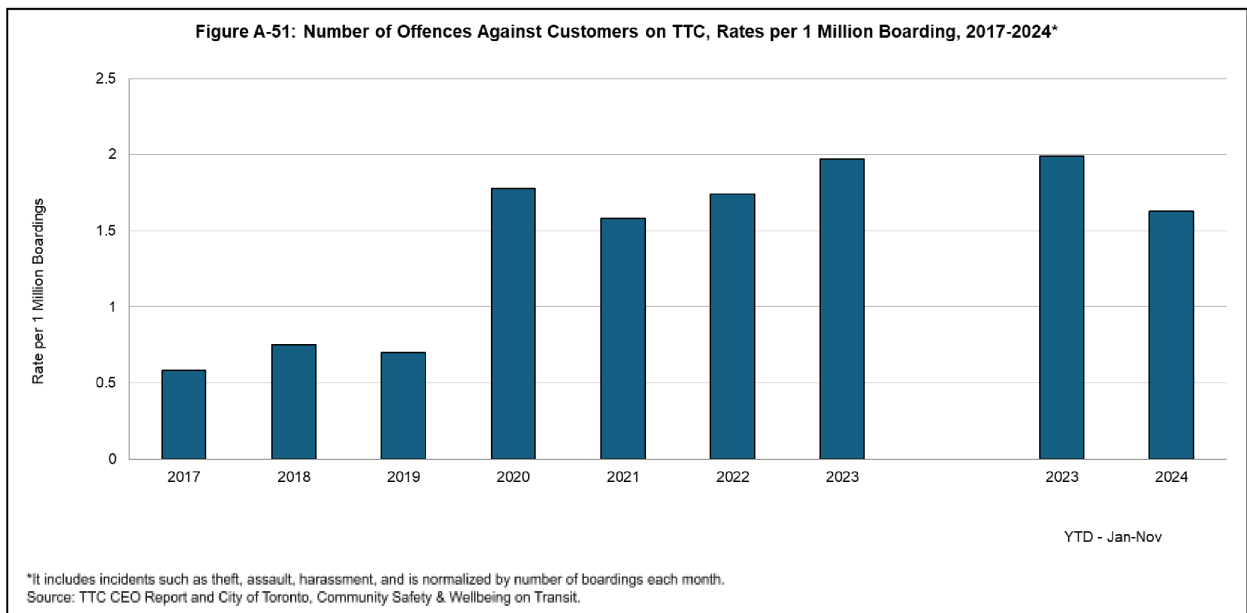
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[12] Presumably most respondents are referring to the TTC, as most Torontonians ride the TTC rather than the regional GO service.

Figure A-50: Number of Major Crimes on TTC, Downtown Toronto and as a Percent of City, 2016-2024*

Source: Toronto Police Service Public Safety Data Portal, Major Crime Indicators.

There has been a rise in major crimes, almost all assaults, on the TTC since 2016. Major TTC crimes increased in the downtown area more frequently than the rest of the city in the early years, but have levelled out at about 25% recently.

There was also a rise in TTC offences reported to TTC but not to the police

Figure A-51 shows offences against customers on the TTC, which were handled by TTC staff and were not reported to the police, from 2017 to 2024 (January-October). These offences include assault, theft, and harassment.

Figure A-51: Number of Offences Against Customers on TTC, Rates per 1 Million Boarding, 2017-2024*

YTD - Jan-Nov

*It includes incidents such as theft, assault, harassment, and is normalized by number of boardings each month.
Source: TTC CEO Report and City of Toronto, Community Safety & Wellbeing on Transit.

Reported offences jumped during the pandemic and have remained high, with a moderate decline in 2024.

Downtown major crimes declined as a percentage of the city in 2022 and 2023

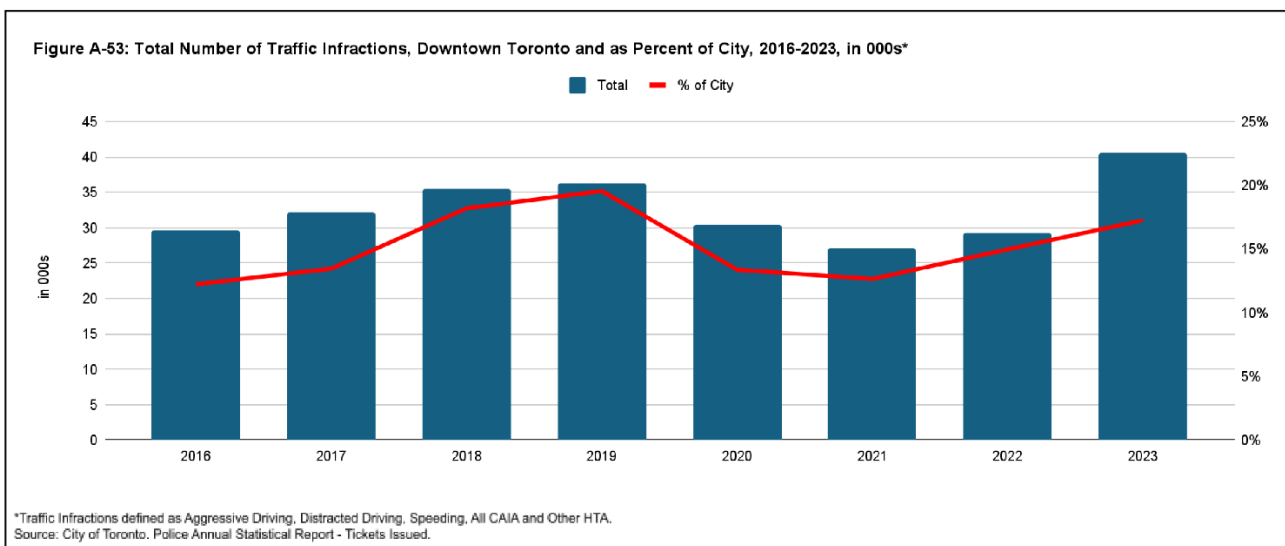Figure A-52 shows the number of major crimes handled by police in downtown Toronto 2016-2024. Assaults account for much of the major crime in downtown Toronto - auto theft is more common in the other parts of the city.

Figure A-52: Number of Major Crimes, Downtown Toronto and as a Percent of City, 2016-2024*

*Major Crimes defined as assault, auto theft, break & enter, robbery and theft over.
Source: Toronto Police Service Public Safety Data Portal, Major Crime Indicators.
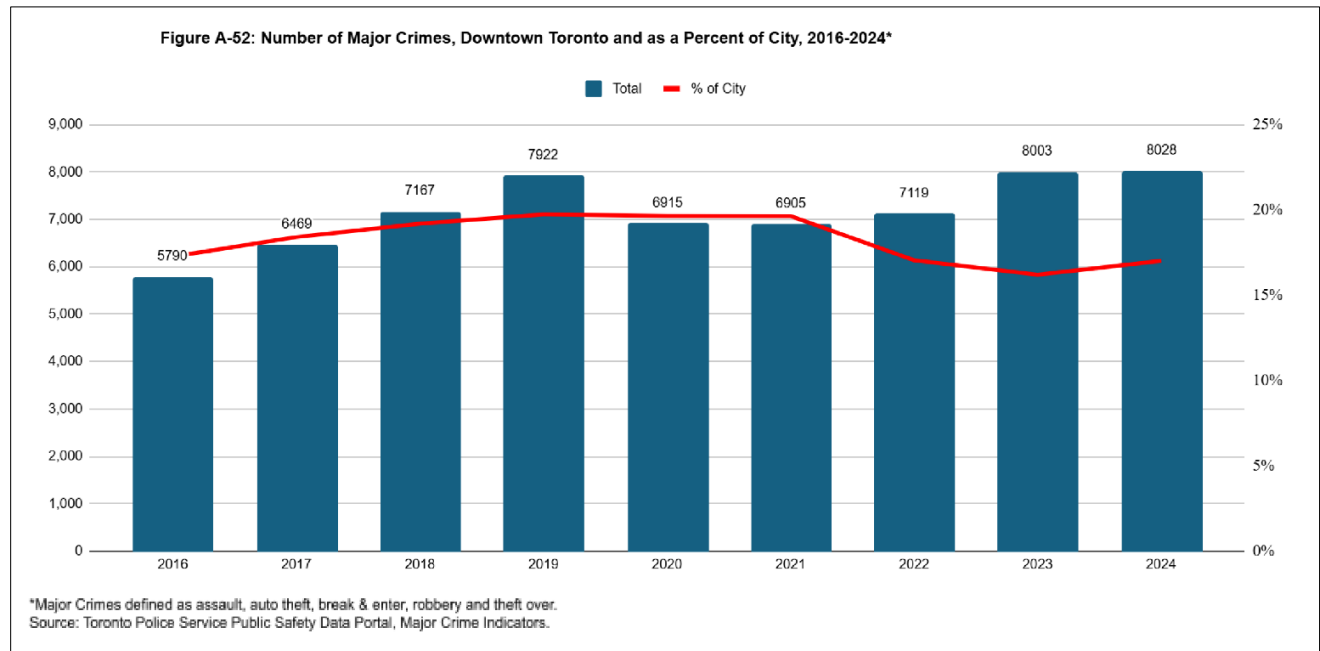
The number of major crimes (mostly assaults) declined in the downtown during the pandemic years before rising again in 2023 and 2024.

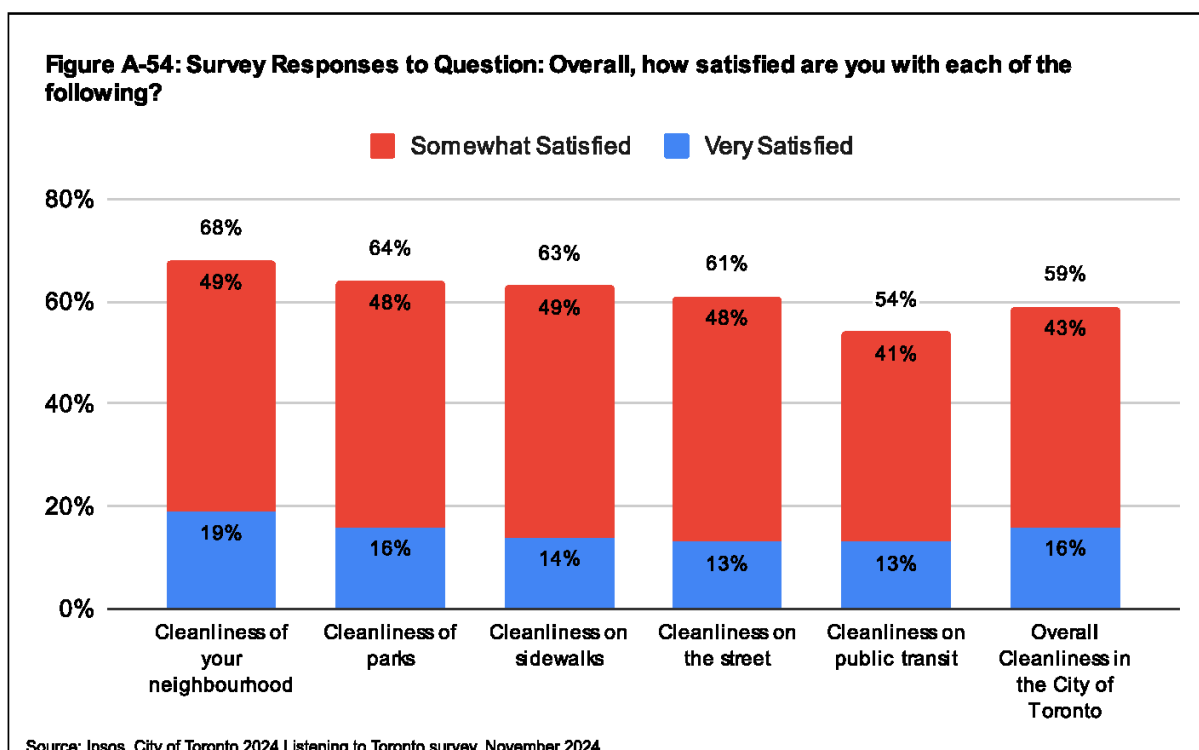***Downtown traffic infractions decreased during the pandemic but rose sharply in 2023***

Figure A-53 presents data on traffic infractions for which tickets were issued from 2016 to 2023 for downtown and as a percent of Toronto.

Figure A-53: Total Number of Traffic Infractions, Downtown Toronto and as Percent of City, 2016-2023, in 000s*

*Traffic Infractions defined as Aggressive Driving, Distracted Driving, Speeding, All CAIA and Other HTA.
Source: City of Toronto. Police Annual Statistical Report - Tickets Issued.

The number of infractions declined during the pandemic years but increased rapidly in 2023. During 2022 and 2023, they increased moderately as a percentage of city-wide infractions.

Cleanliness of the Public Realm

The recent City of Toronto residents' survey did not ask questions about the downtown. It asked about satisfaction with cleanliness in a number of areas, including public transit (see Figure A-54).

Figure A-54: Survey Responses to Question: Overall, how satisfied are you with each of the following?

Source: Ipsos. City of Toronto 2024 Listening to Toronto survey. November 2024.

According to the survey, respondents who were somewhat or very satisfied with the degree of cleanliness ranged from 68% for their neighbourhood to 54% for public transit (mostly the TTC since more Toronto residents use that service). This means that 46% of respondents were unsatisfied with the extent of cleanliness on public transit.

Overall, 59% were satisfied with the city's cleanliness, but 41% were not.

Homelessness and Addiction in the Downtown

Data on homelessness and addiction in the downtown is limited. Data is compiled for the actively homeless people for the city as a whole and via shelter bed capacity in the downtown and the city.

The number of actively homeless people is now higher than before the pandemic
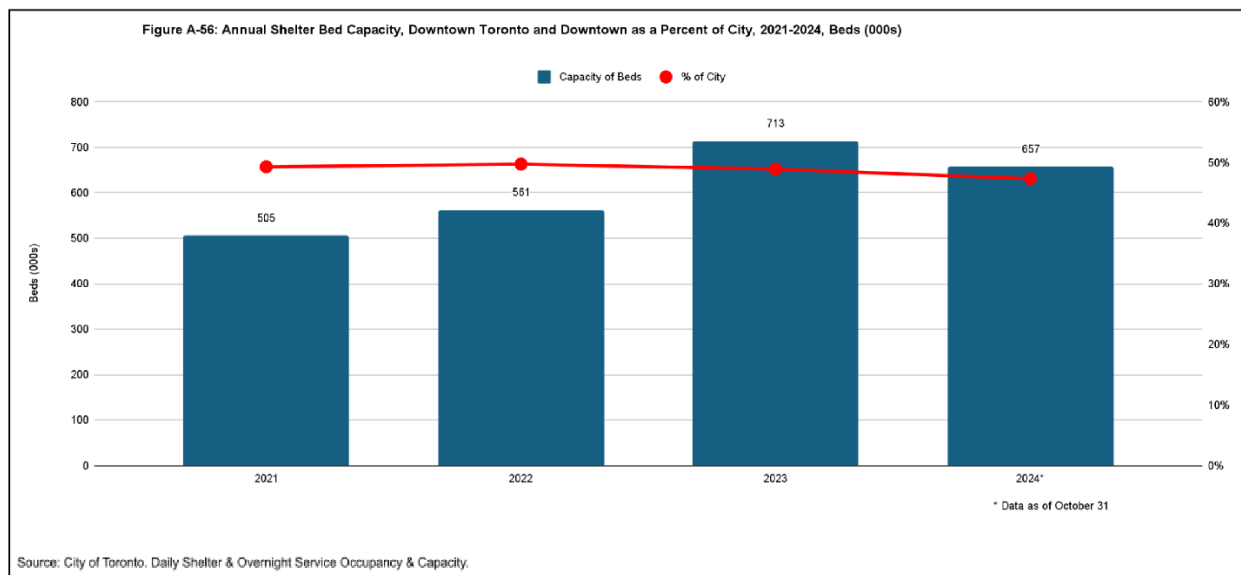
Figure A-55 shows the number of what the City refers to as 'actively homeless' people from 2018 to 2024 (January-October). Actively homeless refers to people who have used the shelter system at least once in the past three months and didn't move to permanent housing.

Figure A-55: Number of Actively Homeless, City of Toronto, 2018-2024 (January-October)*

*Actively Homeless: People who have used the shelter system at least once in the past three months and didn't move to permanent housing.
Source: City of Toronto, Toronto Shelter System Flow.
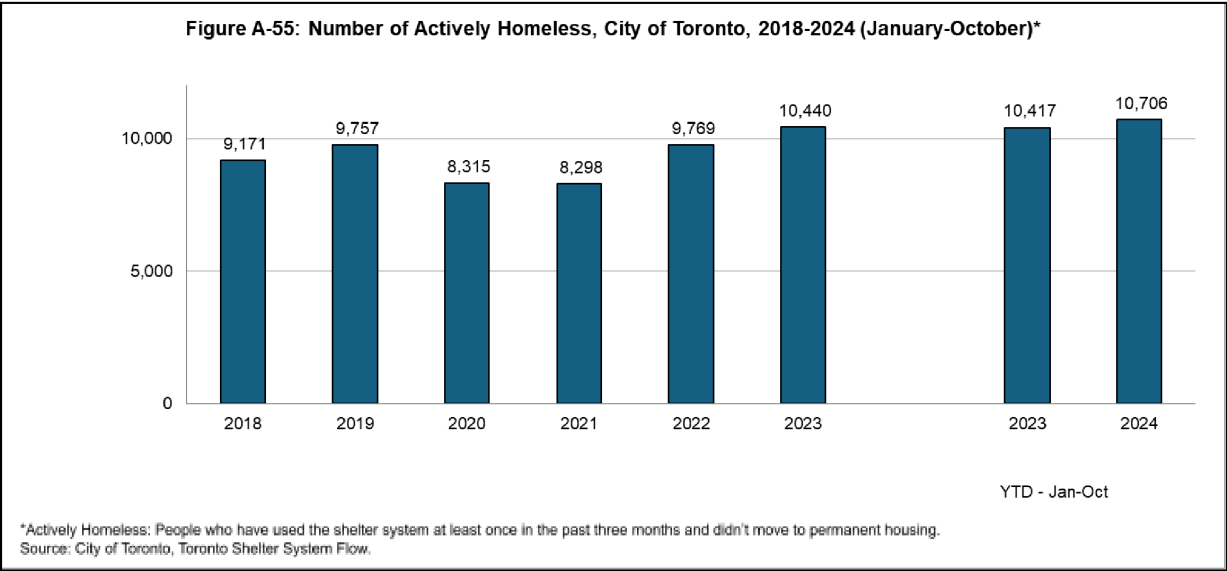
The number of actively homeless people fell during the pandemic years but has risen in 2023 and 2024.

The downtown's share of shelter beds declined in the last two years

Figure A-56 shows the number of shelter beds in the downtown as a percentage of the city for 2021 to 2024 (to October 31).

Figure A-56: Annual Shelter Bed Capacity, Downtown Toronto and Downtown as a Percent of City, 2021-2024, Beds (000s)

Source: City of Toronto. Daily Shelter & Overnight Service Occupancy & Capacity.

The number of annual bed nights of shelter beds in the downtown area increased sharply in 2023, followed by a modest decline in 2024.[13] As a percent of the city, the downtown's share of shelter beds declined marginally from 2023 to 2024.

Many Torontonians regard homelessness as a critical or serious problem

Figure A-57 presents responses to a question on the problem of homelessness in the city in Environics Analytics' Focus GTA survey from 2021 to 2024.

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[13] Annual bed nights refer to the total number of nights that shelter beds are occupied over the course of a year.

Figure A-57: Percentage of Toronto Respondents Thinking Homelessness is the Most Critical or One of the More Serious Problems in the City of Toronto, Summer 2021-2024
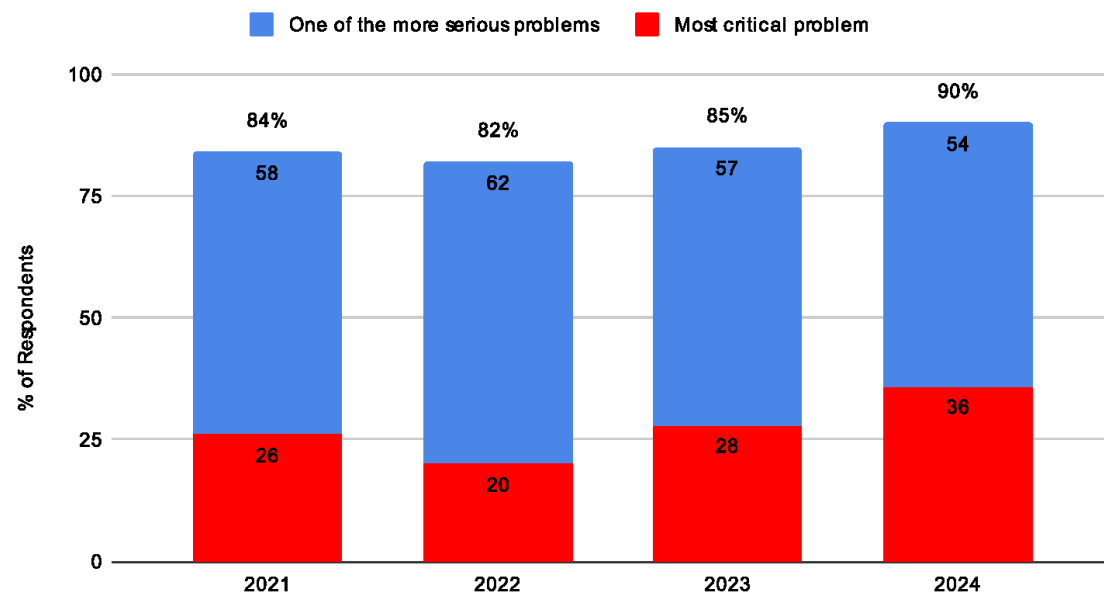
Source: Environics Research. Focus GTA. Special tabulations.

A sizable majority of Toronto residents think homelessness is a critical or serious problem, and the percentage feeling this way increased during 2023 and 2024.