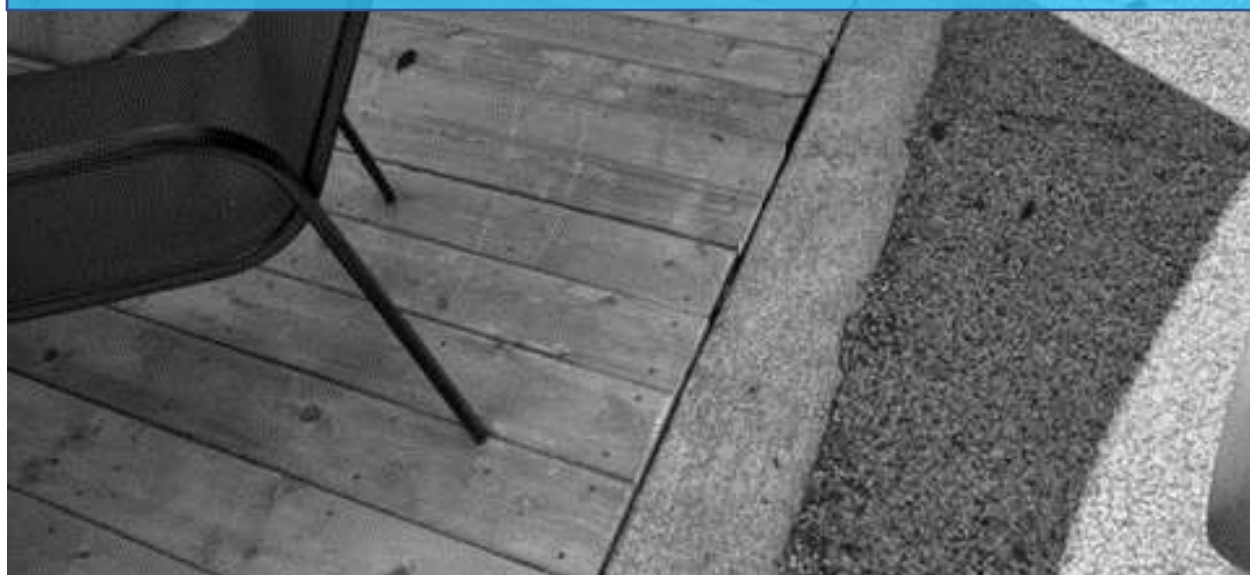




2022 CaféTO Impact Survey Summary



Methodologies

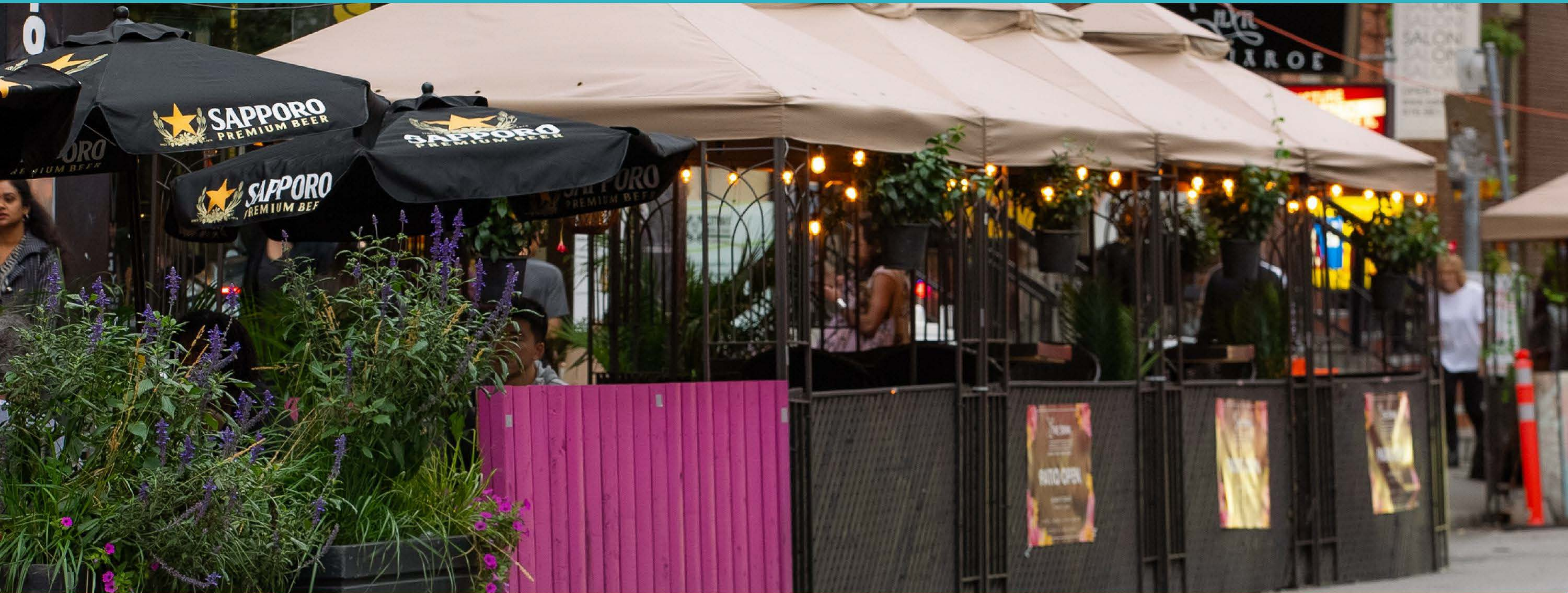
The 2022 CaféTO Impact Survey received submissions from participating businesses between November 24th and December 8th, 2022. Of the 1,300 participating restaurants, 200 participants completed a 22 question survey asking for their business' results and comments about their experience in the CaféTO initiative. Participating restaurants were sent an email requesting a submission with multiple reminders, the final notice of which was issued on the morning of December 5th, and the survey was closed on December 8th. The researchers who curated the survey and compiled the data were Geoff Slemon, Michael Harker and Raj Vihari Kongara of Community Researchers.

Highlights

1. CaféTO delivered \$203M in economic benefits to Toronto in 2022. Participating restaurants invested \$24M on patio upgrades and maintenance CaféTO diners spent an estimated \$179M on patios from May through September.
2. Average investment per participating restaurant estimated Participant survey determined that average restaurant spent \$18,160 throughout season Restaurants invested thousands on furniture, property upgrades, and related expenses.
3. CaféTO accounted for nearly one-third of aggregate restaurant revenue Respondents estimated revenue derived from indoor, CaféTO, permanent outdoor, and take-out Analysis estimated that 31% of total \$573M revenue was related to CaféTO patios.
4. Restaurants shared reasons for participating in program Vast majority participated to generate additional revenue or give more options to customers Many larger restaurants also participated to provide more hours for their staff.
5. Participants provided CaféTO services throughout the day 81% opened CaféTO patios for dinner and 65% opened for lunch Some provided breakfast and evening services; 7% had amplified live music.
6. The vast majority of participants want to resume CaféTO for 2023 Overall, 80% were "very likely" and 8% "somewhat likely" to return for 2023 Those who were unlikely to return reported maintenance, staffing, and vandalism as their reasons.
7. Most CaféTO participants would consider a user fee Respondents were asked to propose a reasonable participation fee for future programs Overall, 75% were willing to pay a user fee for participation in CaféTO 2023.
8. Respondents shared suggestions for changes and improvements Three-quarters want assistance with procuring and fencing; half want more BIA collaboration Specific comments from dozens of respondents are compiled at the end of the report.

2022 CaféTO Impact Survey

May to September 2022



COMMUNITY RESEARCHERS



Methodology Summary



Survey Methodology

Field dates	November 24 through December 8
Survey target	Approximately 1,300 participating restaurants
Survey methodology	Email survey with multiple reminders
Survey sample size	Approximately 200 completed surveys
Lead researchers	Geoff Slemon, Michael Harker, and Raj Vihari Kongara



Highlights



1. CaféTO delivered \$203M in economic benefits to Toronto in 2022

- Participating restaurants invested \$24M on patio upgrades and maintenance
- CaféTO diners spent an estimated \$179M on patios from May through September

2. Average investment per participating restaurant estimated

- Participant survey determined that average restaurant spent \$18,160 throughout season
- Restaurants invested thousands on furniture, property upgrades, and related expenses

3. CaféTO accounted for nearly one-third of aggregate restaurant revenue

- Respondents estimated revenue derived from indoor, CaféTO, permanent outdoor, and take-out
- Analysis estimated that 31% of total \$573M revenue was related to CaféTO patios

4. Restaurants shared reasons for participating in program

- Vast majority participated to generate additional revenue or give more options to customers
- Many larger restaurants also participated to provide more hours for their staff



Highlights



5. Participants provided CaféTO services throughout the day

- 81% opened CaféTO patios for dinner and 65% opened for lunch
- Some provided breakfast and evening services; 7% had amplified live music

6. The vast majority of participants want to resume CaféTO for 2023

- Overall, 80% were "very likely" and 8% "somewhat likely" to return for 2023
- Those who were unlikely to return reported maintenance, staffing, and vandalism as their reasons

7. Most CaféTO participants would consider a user fee

- Respondents were asked to propose a reasonable participation fee for future programs
- Overall, 75% were willing to pay a user fee for participation in CaféTO 2023

8. Respondents shared suggestions for changes and improvements

- Three-quarters want assistance with procuring and fencing; half want more BIA collaboration
- Specific comments from dozens of respondents are compiled at the end of the report



Section 1: CaféTO Total Economic Benefits



CaféTO Total Economic Benefits

Average
per participant

Total
economic benefits

Restaurant expenditures and investments in 2022

\$18,160

\$24.1M

Estimated sales from CaféTO patios in 2022

\$135,000

\$179M

Total spending related to CaféTO in 2022

\$153,000

\$203M



Section 2: CaféTO Participant Expenditures



CaféTO Expenditures by Participating Restaurants

Total Expenditures

Average Expenditures per Participant

Total furniture expenditures



\$11.4M

\$8,640

Total property expenditures



\$8.1M

\$6,090

Total other expenditures



\$4.6M

\$3,430

Total CaféTO expenditures by participants

\$24,100,000

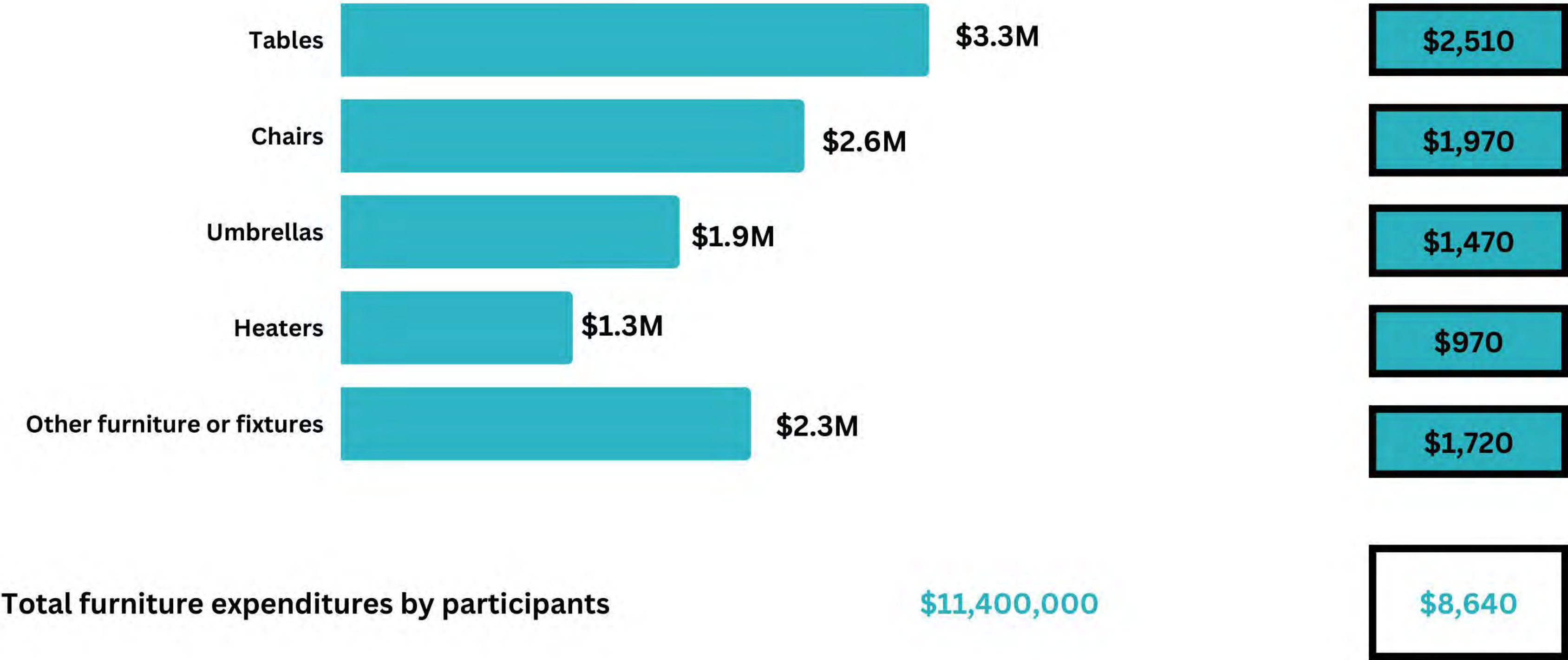
\$18,160



Furniture Expenditures by Participating Restaurants

Total Expenditures

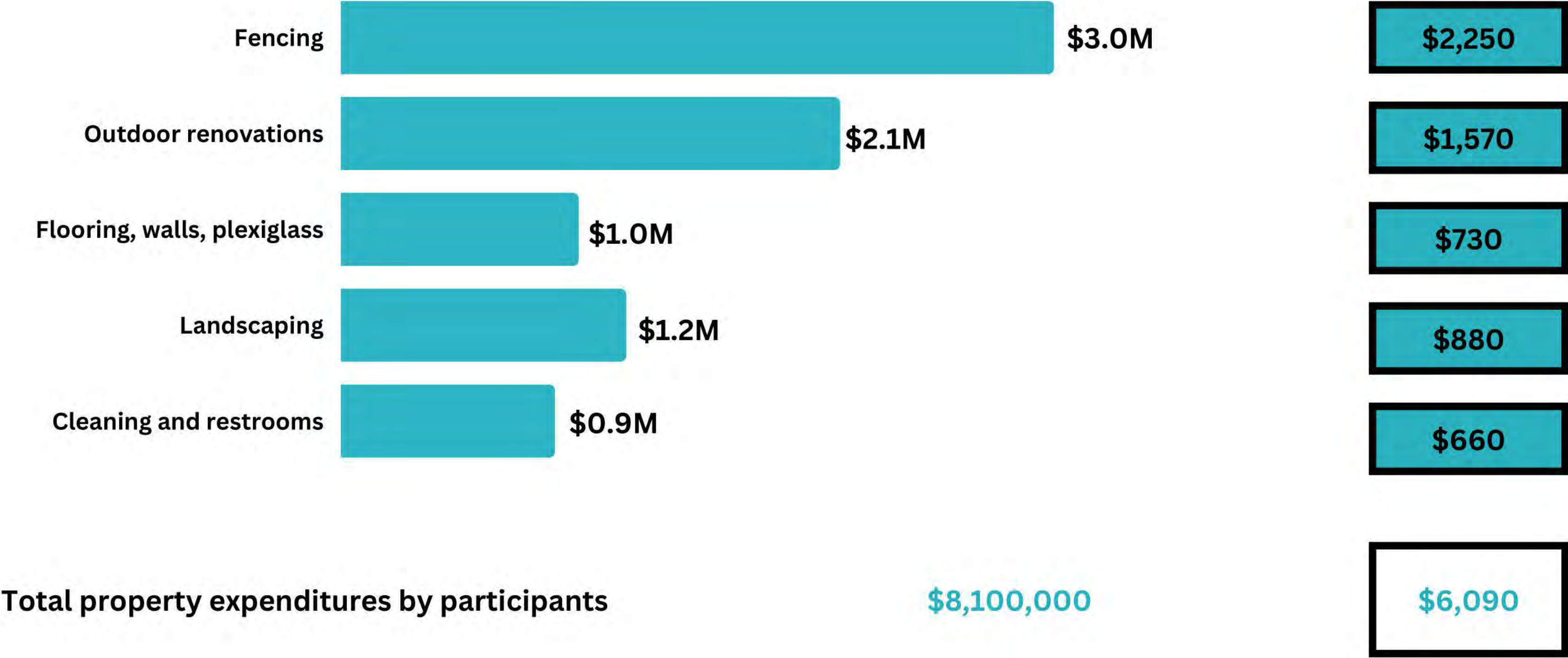
Average Expenditures per Participant



Property Expenditures by Participating Restaurants

Total Expenditures

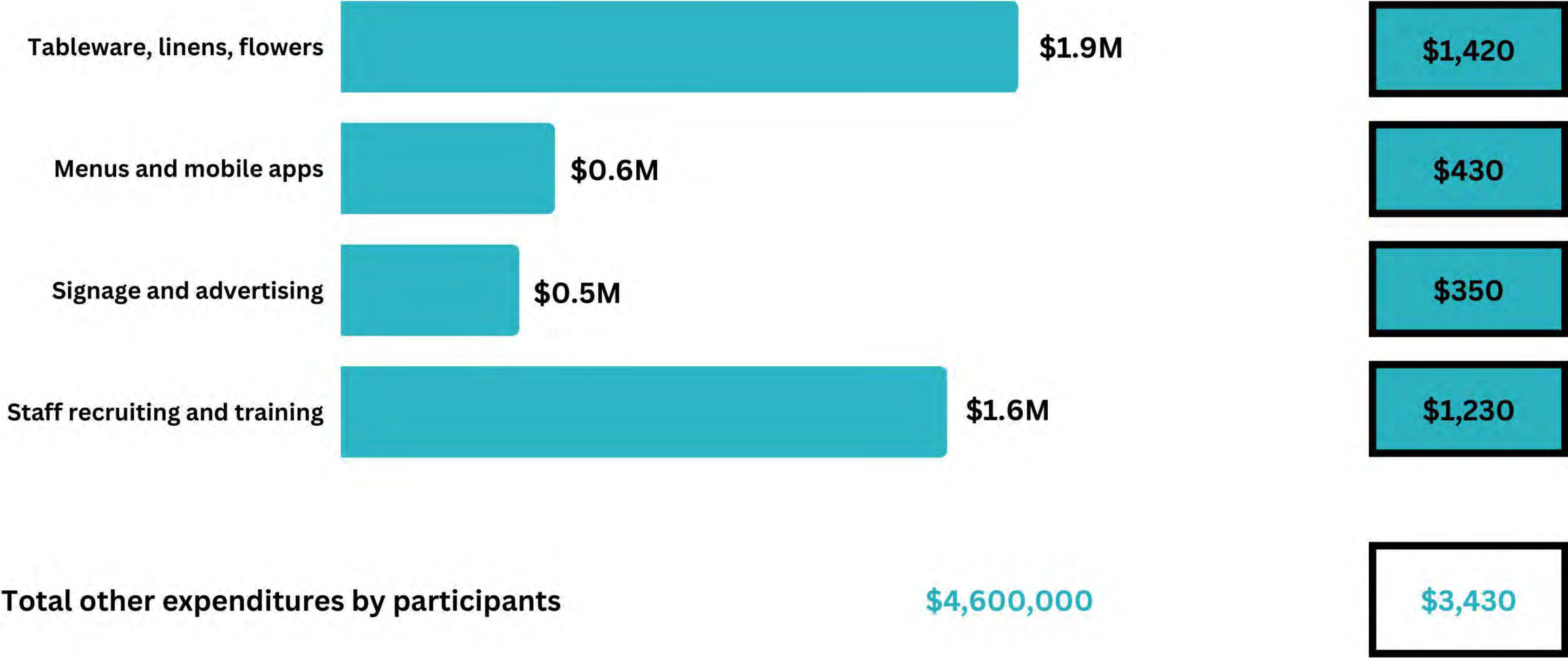
Average Expenditures
per Participant



Other Expenditures by Participating Restaurants

Total Expenditures

Average Expenditures per Participant



Average Expenditures by Municipal Ward	Furniture	Property	Others	Total
Toronto Centre	\$9,200	\$6,600	\$1,470	\$17,270
Spadina-Fort York	\$8,890	\$5,610	\$1,590	\$16,090
Toronto-Danforth	\$9,000	\$6,090	\$1,000	\$16,090
Parkdale-High Park	\$8,570	\$4,860	\$1,480	\$14,910
Toronto-St. Paul's	\$6,880	\$5,430	\$1,530	\$13,840
University-Rosedale	\$11,660	\$6,530	\$2,530	\$20,660
Davenport	\$5170	\$4,000	\$580	\$9,750
Beaches-East York	\$8,200	\$10,500	\$1,200	\$19,900
Willowdale	\$8,800	\$5,000	\$800	\$14,600
Etobicoke Centre	\$6,400	\$7,800	\$1,200	\$15,400
Eglinton-Lawrence	\$5,250	\$2,000	\$500	\$7,750

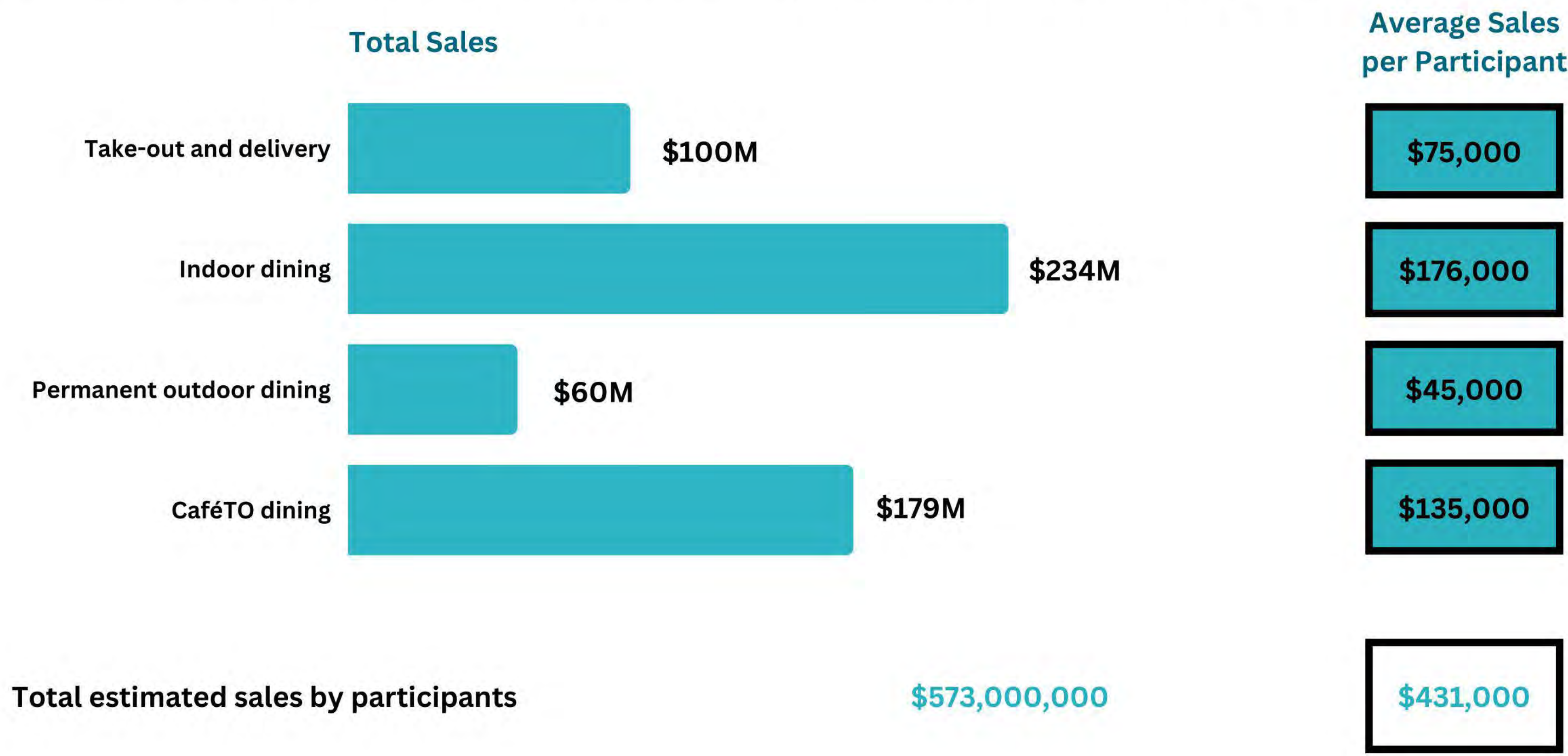
Note: Municipal Wards with 5 or more responses are included.



Section 3: CaféTO Program Revenues



Estimated Total Sales by Participants (May through September)



Average Revenue by Municipal Ward	Take-out and delivery	Indoor	Outdoor	CaféTO	Total
Toronto Centre	\$85,200	\$220,000	\$50,000	\$145,000	\$500,000
Spadina-Fort York	\$65,380	\$210,150	\$65,380	\$126,090	\$467,000
Toronto-Danforth	\$48,750	\$130,000	\$48,750	\$97,500	\$325,000
Parkdale-High Park	\$70,980	\$104,780	\$27,040	\$135,200	\$338,000
Toronto-St. Paul's	\$60,300	\$123,950	\$36,850	\$113,900	\$335,000
University-Rosedale	\$83,800	\$419,000	\$83,800	\$251,400	\$838,000
Davenport	\$58,170	\$108,030	\$19,390	\$91,410	\$277,000
Beaches-East York	\$30,800	\$141,680	\$21,560	\$113,960	\$308,000
Willowdale	\$67,800	\$257,640	\$54,240	\$72,320	\$452,000
Etobicoke Centre	\$137,600	\$167,700	\$17,200	\$107,500	\$430,000
Eglinton-Lawrence	\$128,700	\$78,000	\$62,400	\$120,900	\$390,000

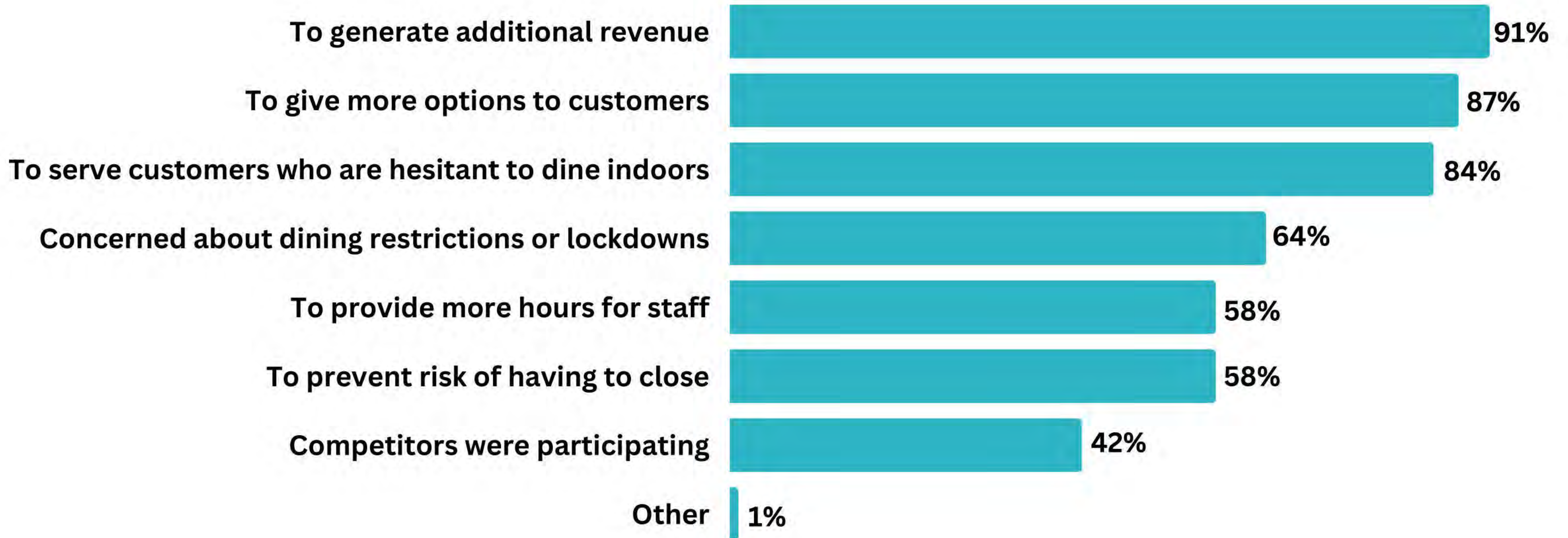
Note: Municipal Wards with 5 or more responses are included.



Section 4: CaféTO Program Participation



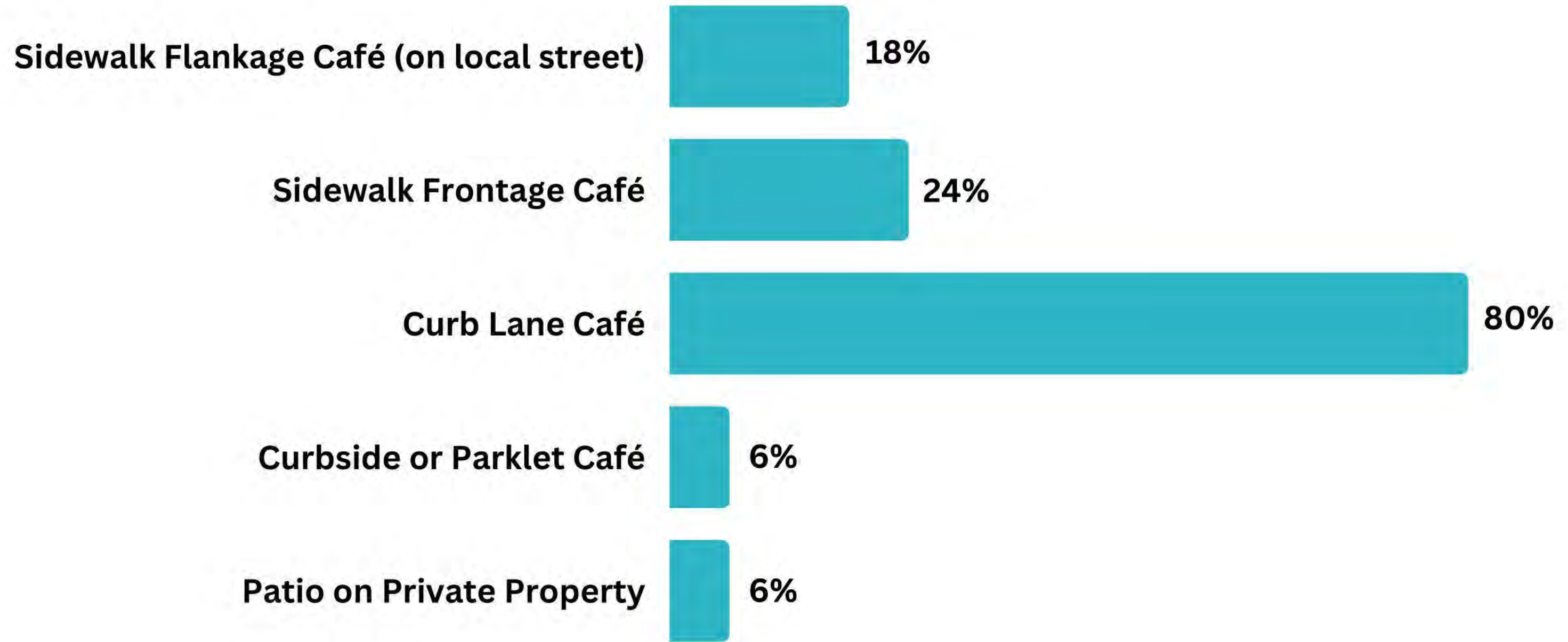
Reasons for Participation



Reasons for participation	Up to \$250,000	\$250,000 - \$500,000	Over \$500,000	No parking spaces	1 to 2 spaces	3 or more spaces	All
To generate additional revenue	88%	92%	94%	91%	90%	91%	91%
To give more options to customers	88%	94%	84%	83%	92%	87%	87%
To serve customers who are hesitant to dine indoors	79%	86%	91%	78%	87%	84%	84%
Concerned about more restrictions or lockdowns	59%	64%	72%	50%	70%	68%	64%
To provide more hours for staff	40%	74%	78%	61%	59%	56%	58%
To prevent risk of having to close	60%	60%	60%	44%	59%	67%	58%
Competitors were participating	43%	52%	28%	39%	46%	41%	42%
Other	2%	0%	0%	0%	0%	1%	0%



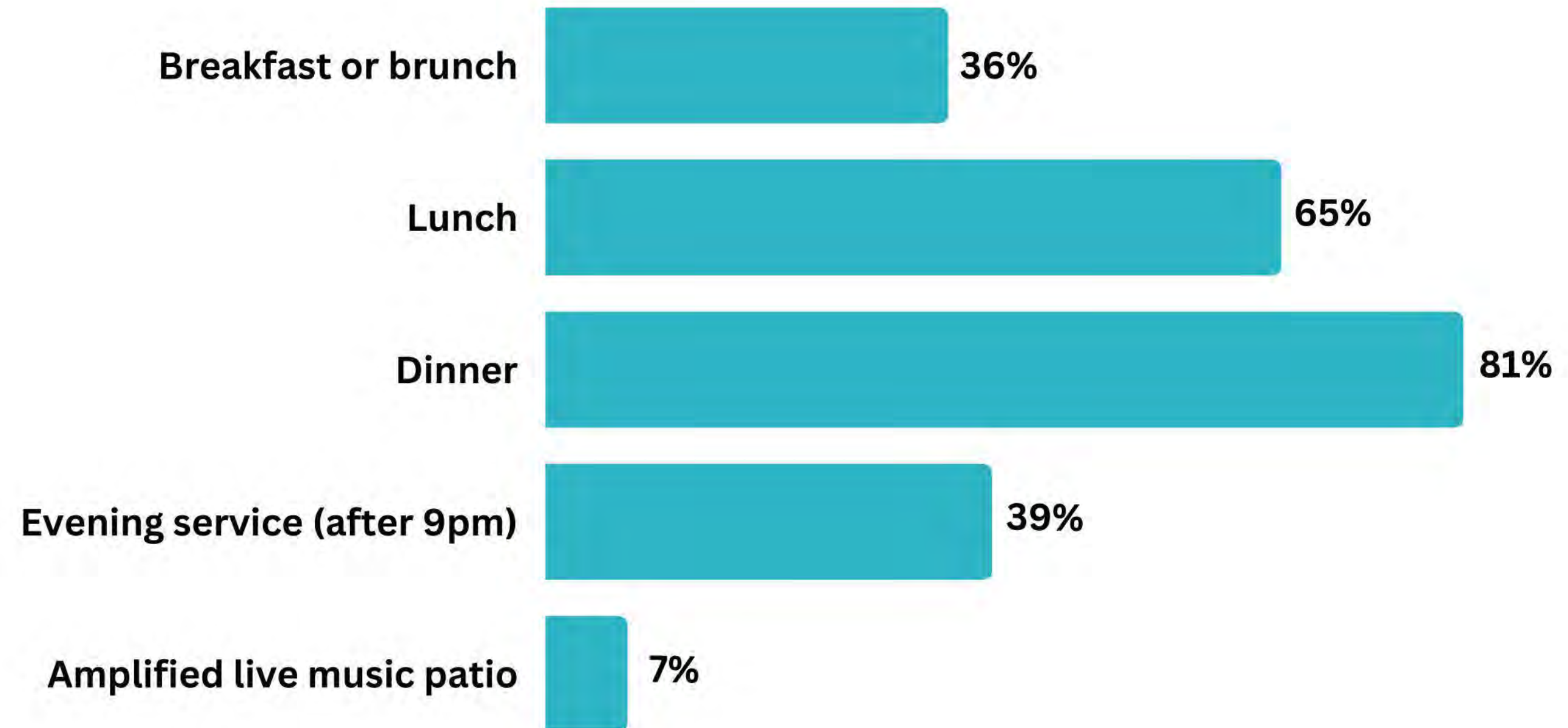
CaféTO Experiences Featured at Restaurant



CaféTO Experiences Featured	Up to \$250,000	\$250,000 - \$500,000	Over \$500,000	No parking spaces	1 to 2 spaces	3 or more spaces	All
Sidewalk Flankage Café (on local street)	10%	10%	16%	28%	11%	16%	18%
Sidewalk Frontage Café	17%	14%	28%	17%	23%	28%	24%
Curb Lane Café	76%	88%	97%	72%	89%	79%	80%
Curbside or Parklet Café	10%	4%	3%	4%	7%	7%	6%
Patio on Private Property	3%	6%	9%	11%	5%	3%	6%



CaféTO Services Offered by Restaurant



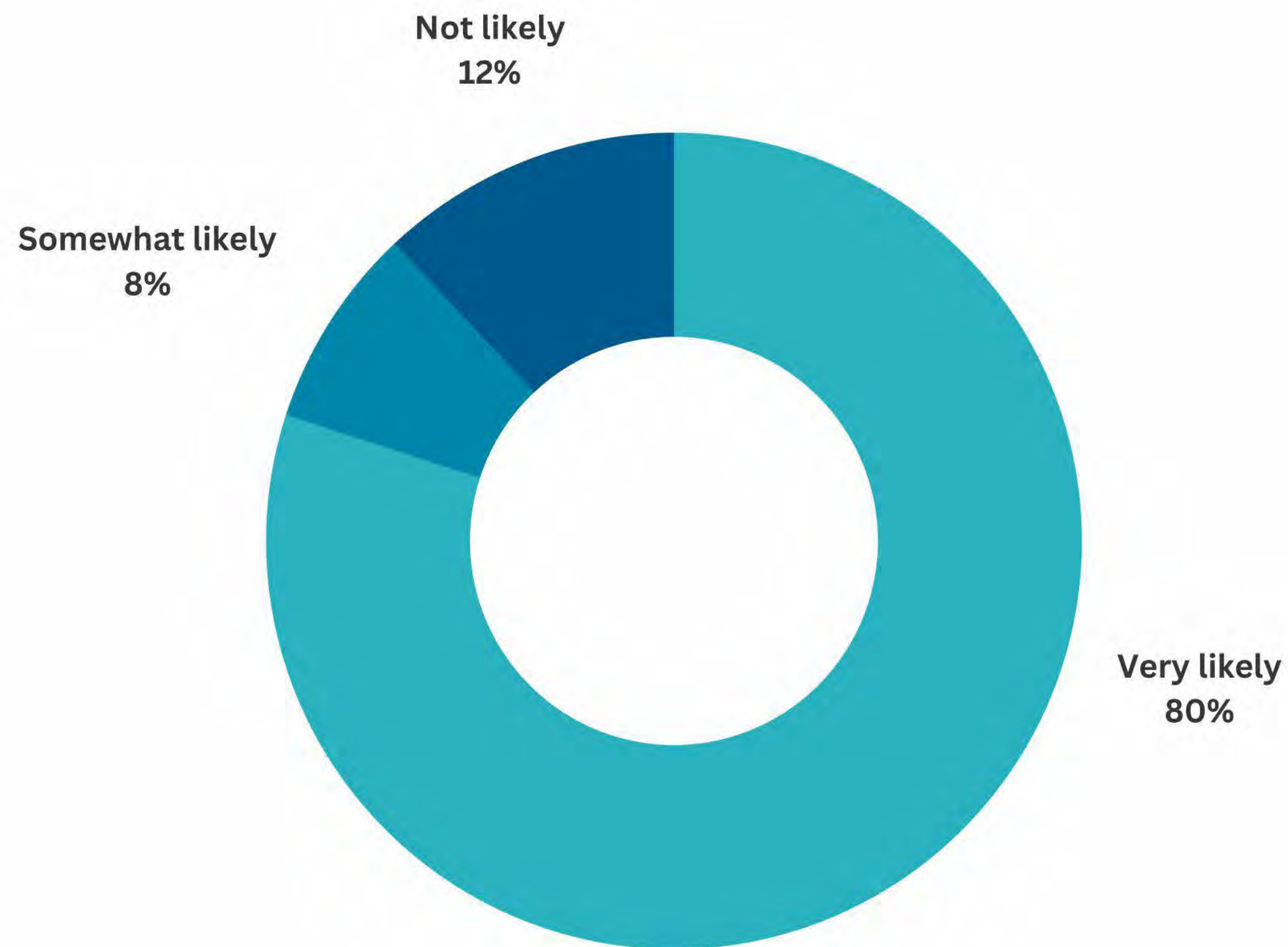
CaféTO Services Offered	Up to \$250,000	\$250,000 - \$500,000	Over \$500,000	No parking spaces	1 to 2 spaces	3 or more spaces	All
Breakfast or brunch	29%	33%	41%	41%	41%	28%	36%
Lunch	62%	59%	75%	67%	59%	68%	65%
Dinner	69%	88%	97%	78%	74%	88%	81%
Evening service (after 9pm)	40%	33%	56%	46%	43%	32%	39%
Amplified live music patio	7%	0%	6%	13%	3%	7%	7%



Section 5: Future Participation



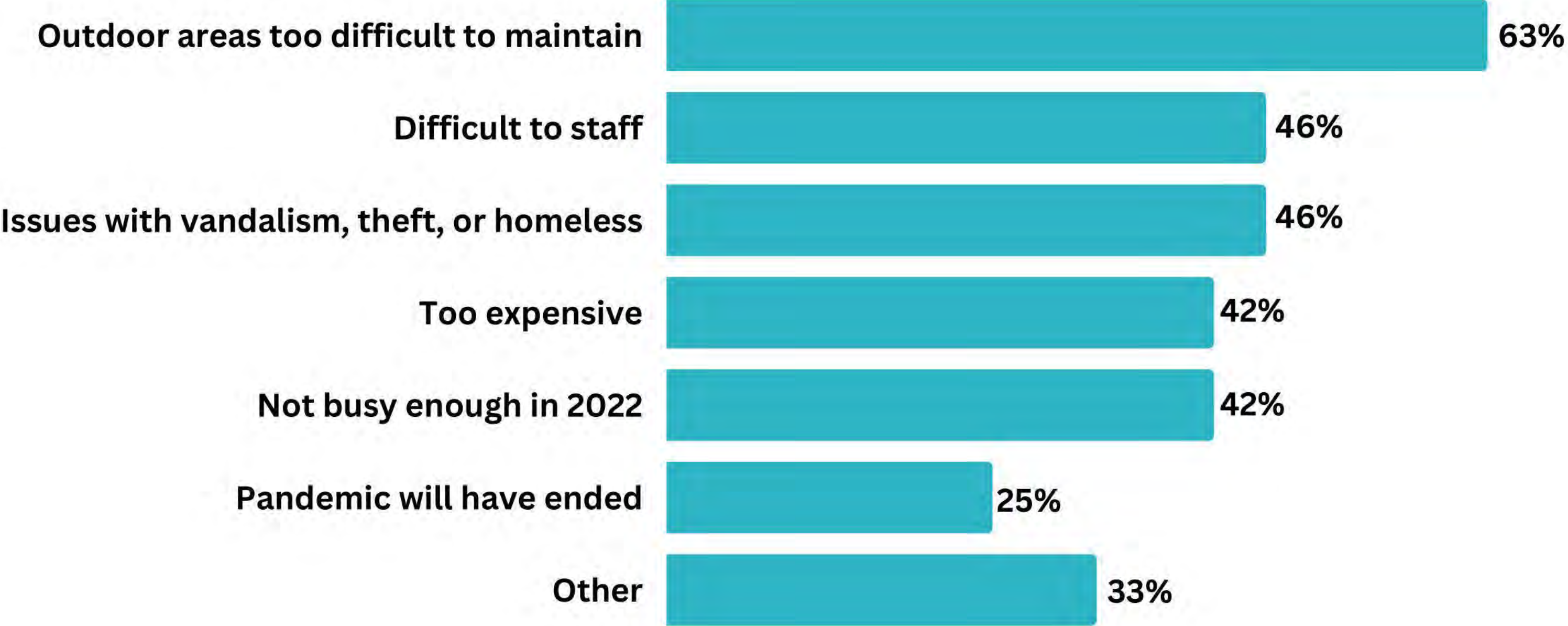
Likelihood of Participation in 2023



Participation in 2023	Up to \$250,000	\$250,000 - \$500,000	Over \$500,000	No parking spaces	1 to 2 spaces	3 or more spaces	All
Very likely	76%	88%	91%	85%	80%	87%	80%
Somewhat likely	17%	2%	3%	9%	10%	8%	8%
Not likely	7%	10%	6%	7%	10%	5%	12%

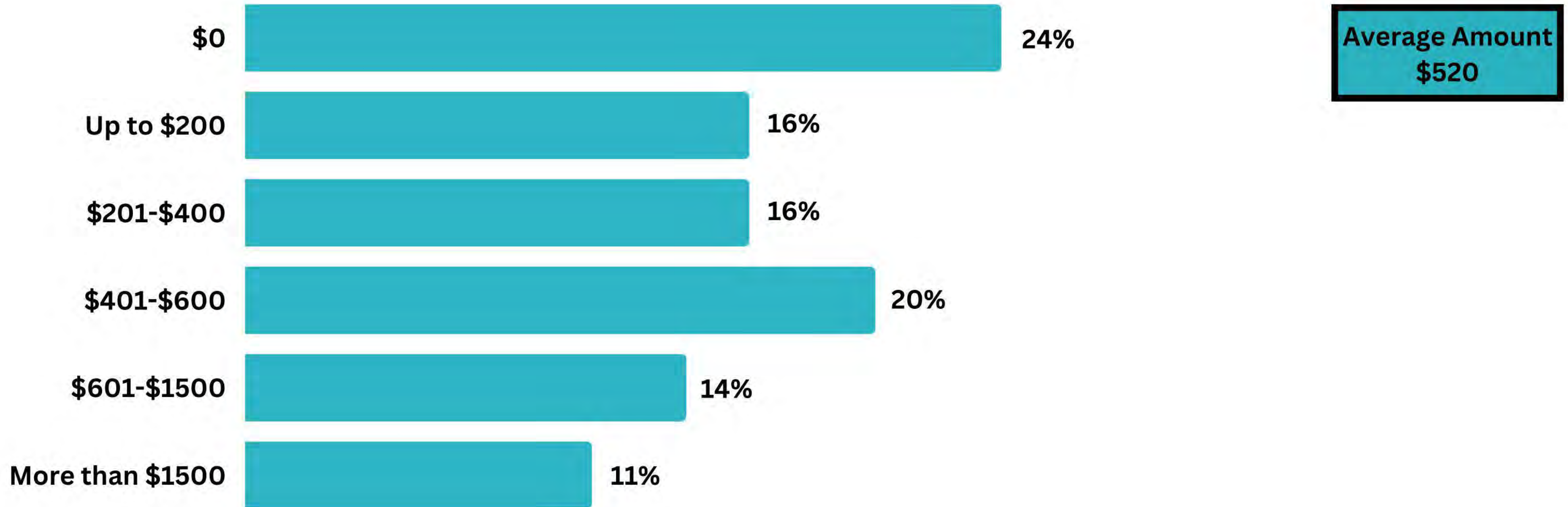


Reasons would not Participate in 2023 (among those not likely)



"Other" reasons involve accessibility with allocated space and limited parking

Suggested CaféTO Participant Fee for 2023 (unaided)



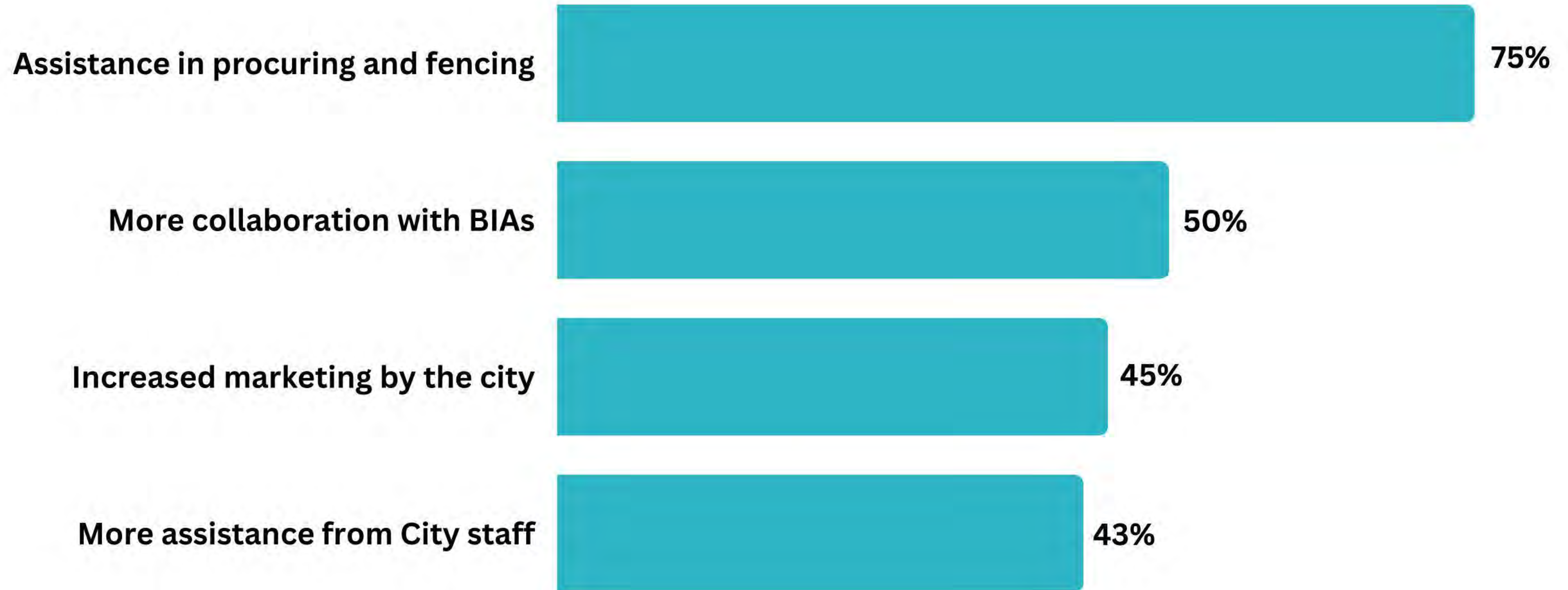
Note: Survey participants were asked open-ended question and were unaided in their fee suggestions



Suggested CaféTO Annual Fee 2023 (unaided)	Up to \$250,000	\$250,000 - \$500,000	Over \$500,000	No parking spaces	1 to 2 spaces	3 or more spaces	All
\$0	26%	17%	23%	26%	27%	21%	24%
Up to \$200	21%	19%	7%	18%	13%	19%	16%
\$201 to \$400	19%	15%	13%	10%	18%	14%	16%
\$401 to \$600	19%	15%	27%	23%	16%	21%	20%
\$601 to \$1500	11%	21%	13%	10%	16%	14%	14%
More than \$1500	4%	13%	17%	8%	11%	11%	11%
Average amount suggested	\$349	\$590	\$643	\$433	\$517	\$585	\$520



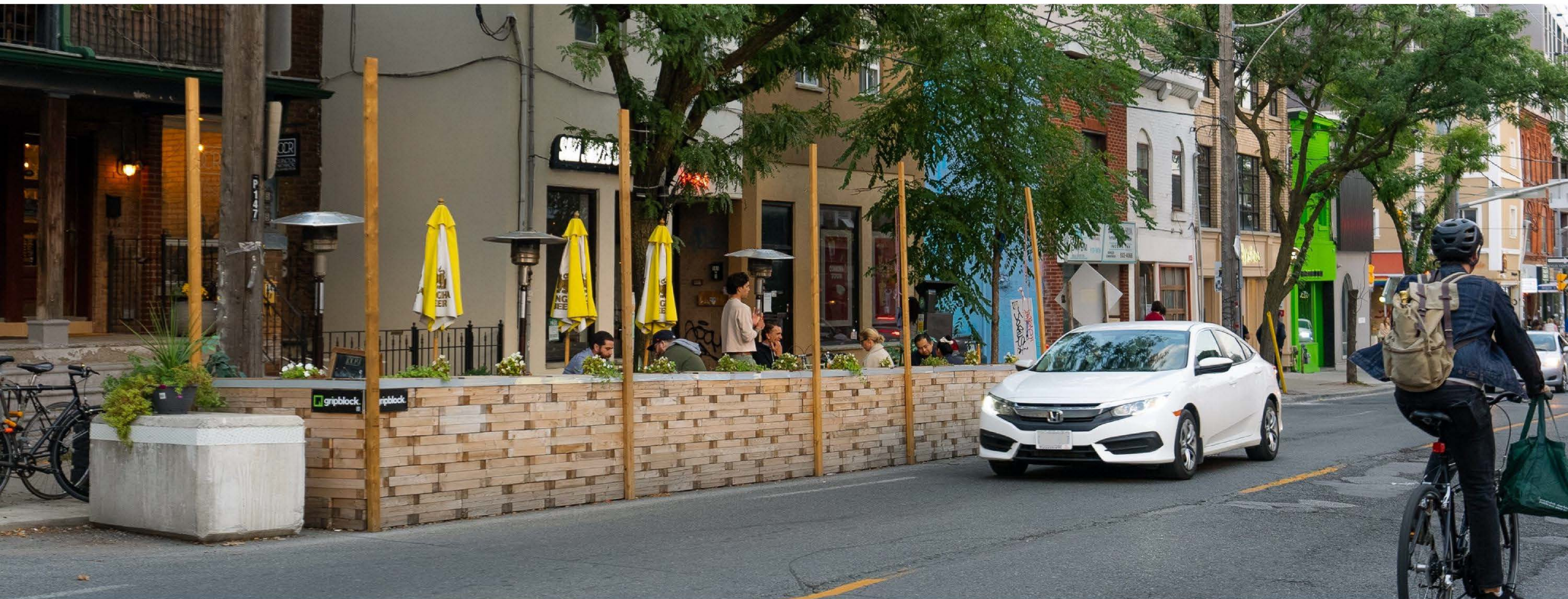
Interest in Changes and Improvements for 2023



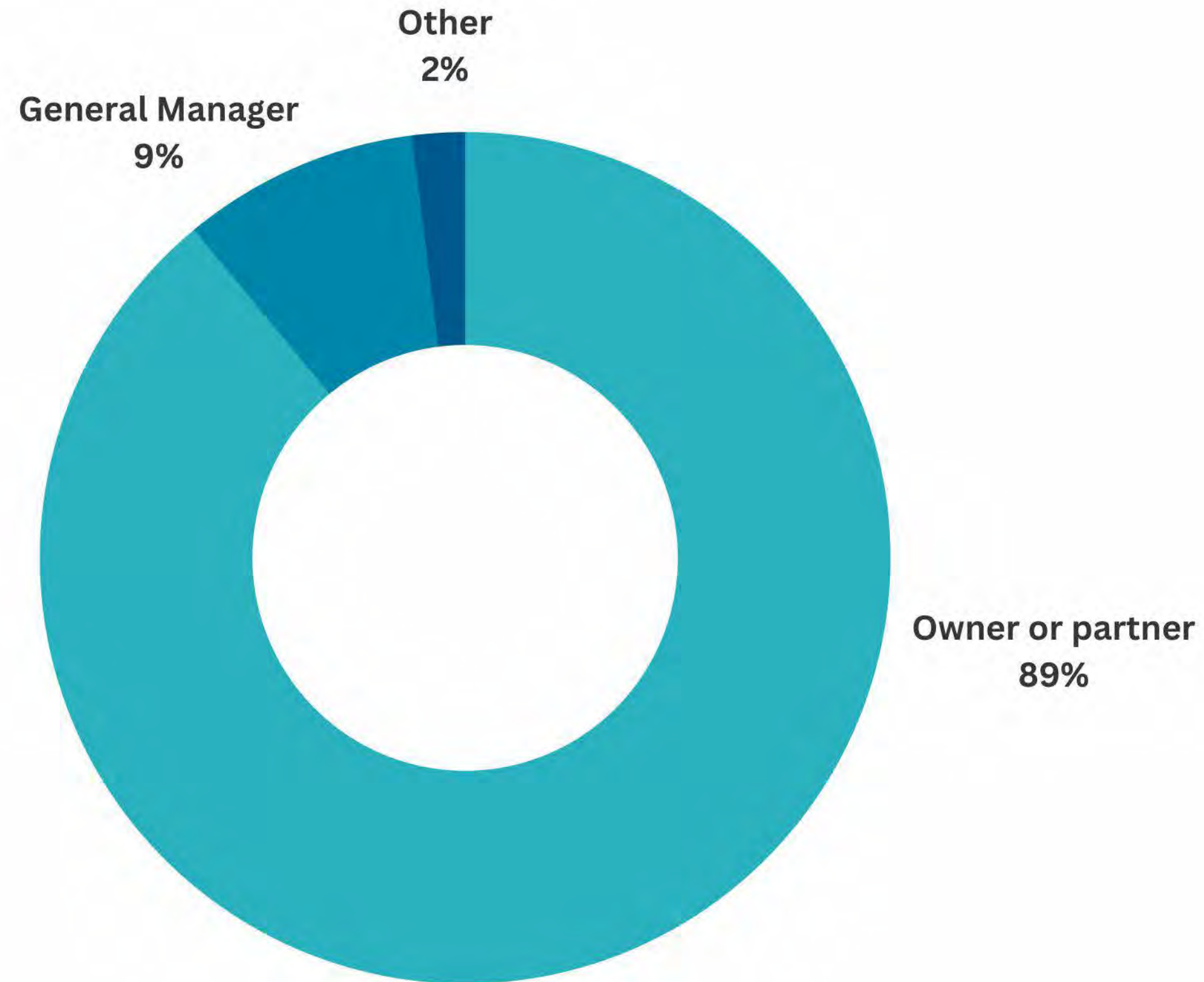
	Up to \$250,000	\$250,000 - \$500,000	Over \$500,000	No parking spaces	1 to 2 spaces	3 or more spaces	All
Assistance in procuring and fencing	80%	28%	43%	40%	35%	50%	43%
More collaboration with BIAs	50%	49%	32%	40%	44%	61%	50%
Increased marketing by the city	48%	45%	29%	43%	39%	56%	45%
More assistance from City staff	80%	70%	75%	79%	78%	70%	75%



Section 5: Organizational Information



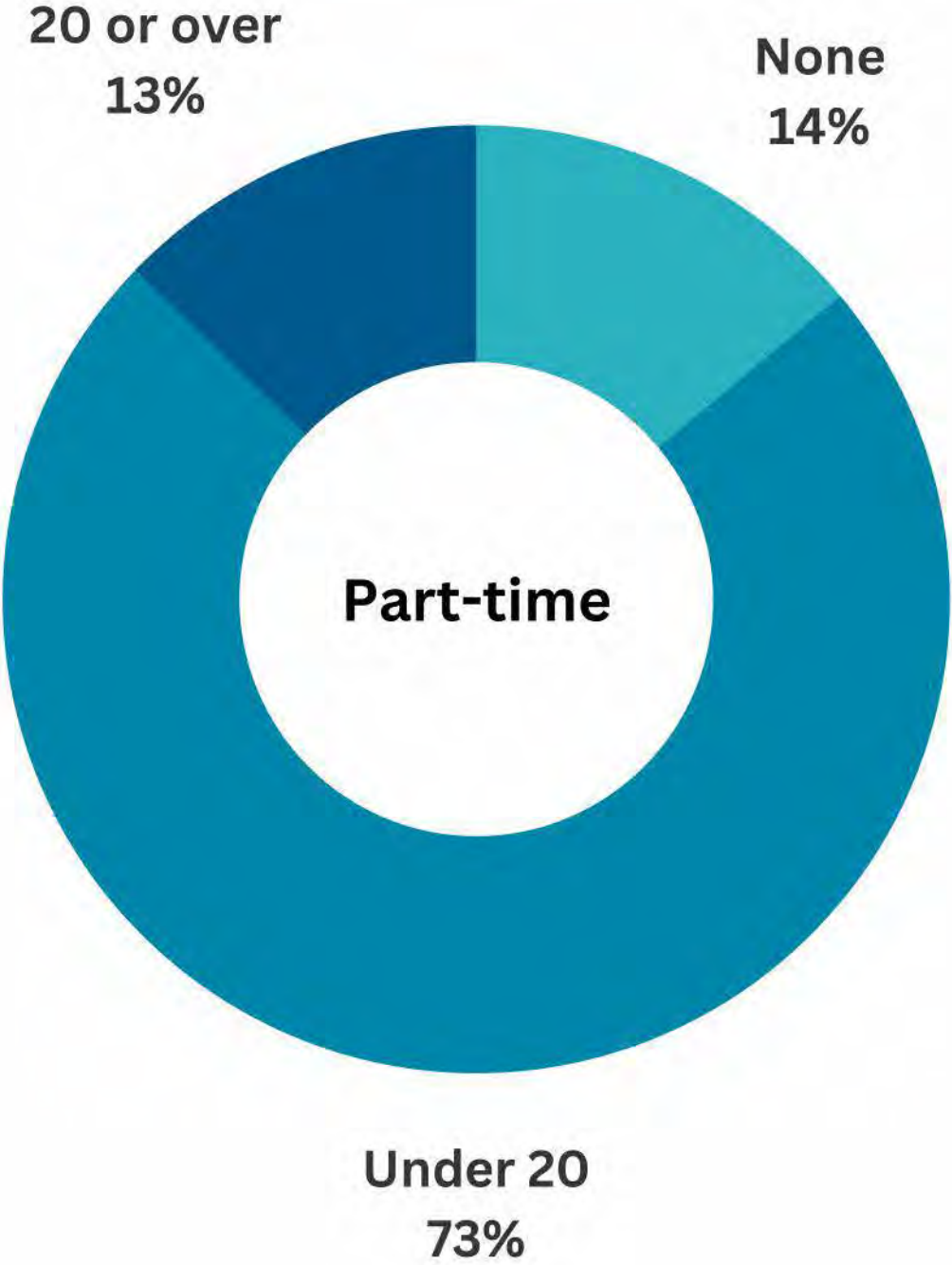
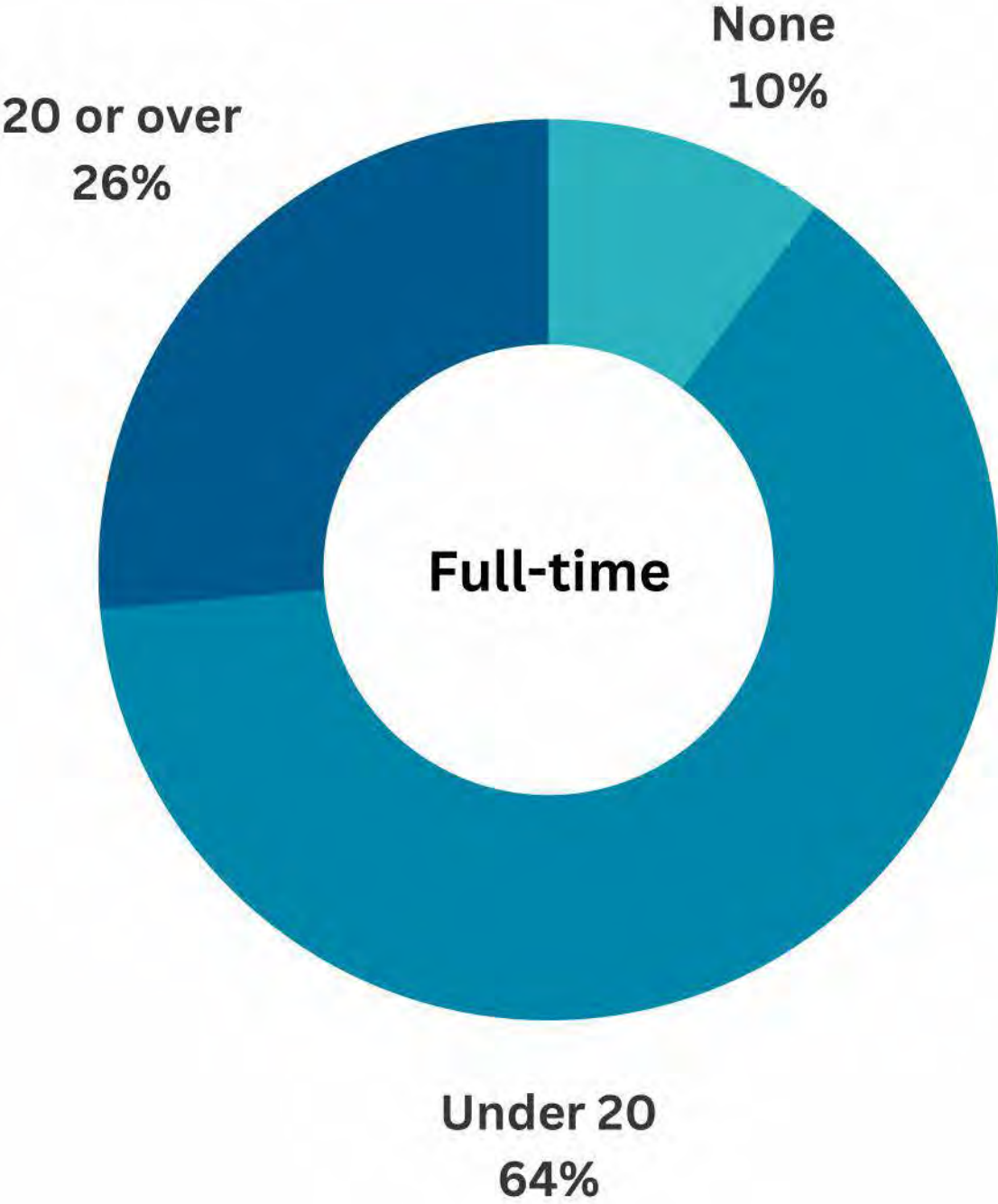
Respondent Role in Restaurant



Role in restaurant	Up to \$250,000	\$250,000 - \$500,000	Over \$500,000	No parking spaces	1 to 2 spaces	3 or more spaces	All
Owner or partner	87%	94%	87%	94%	97%	80%	89%
General Manager	9%	4%	13%	4%	3%	16%	9%
Other	4%	2%	0%	2%	0%	4%	2%



Full and Part-time Staff Levels



Average Staff
per Participant

Full-time
14

Part-time
11

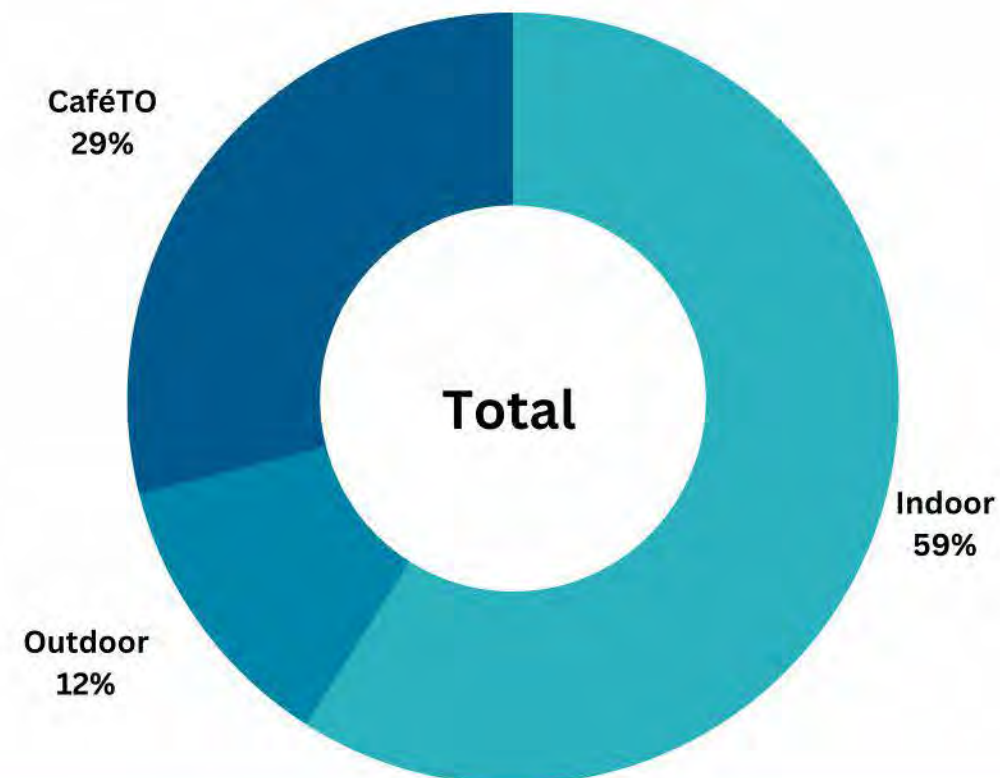
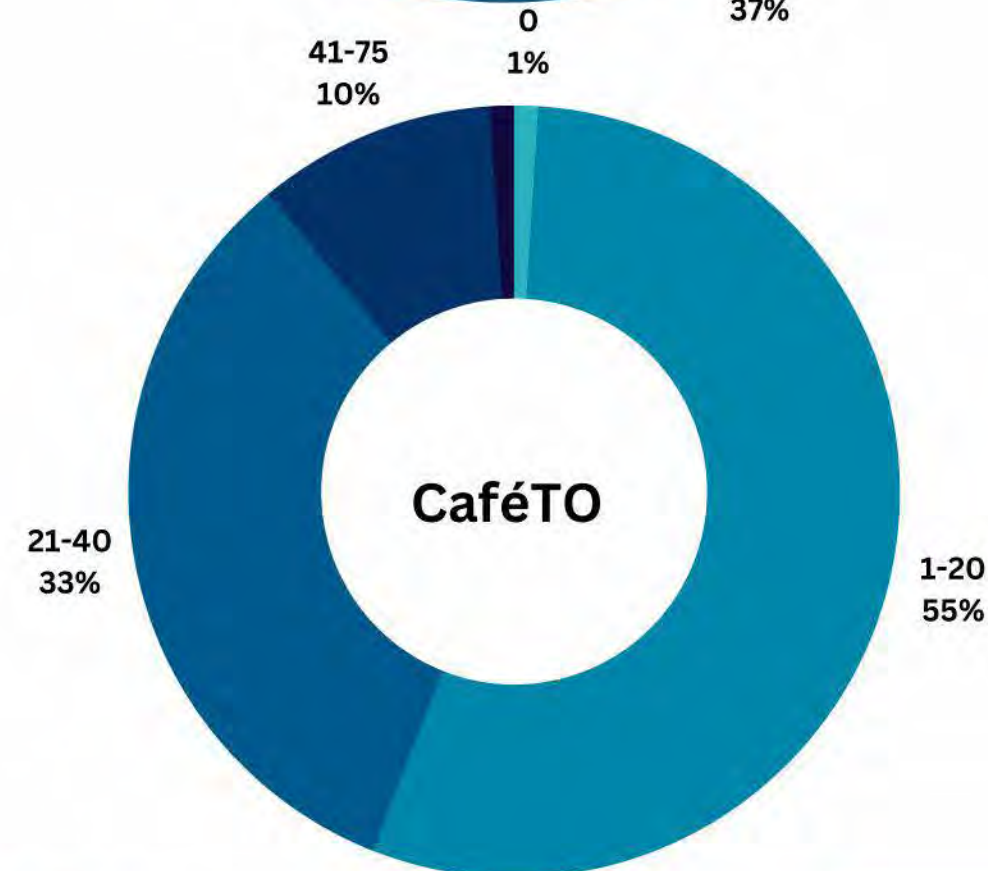
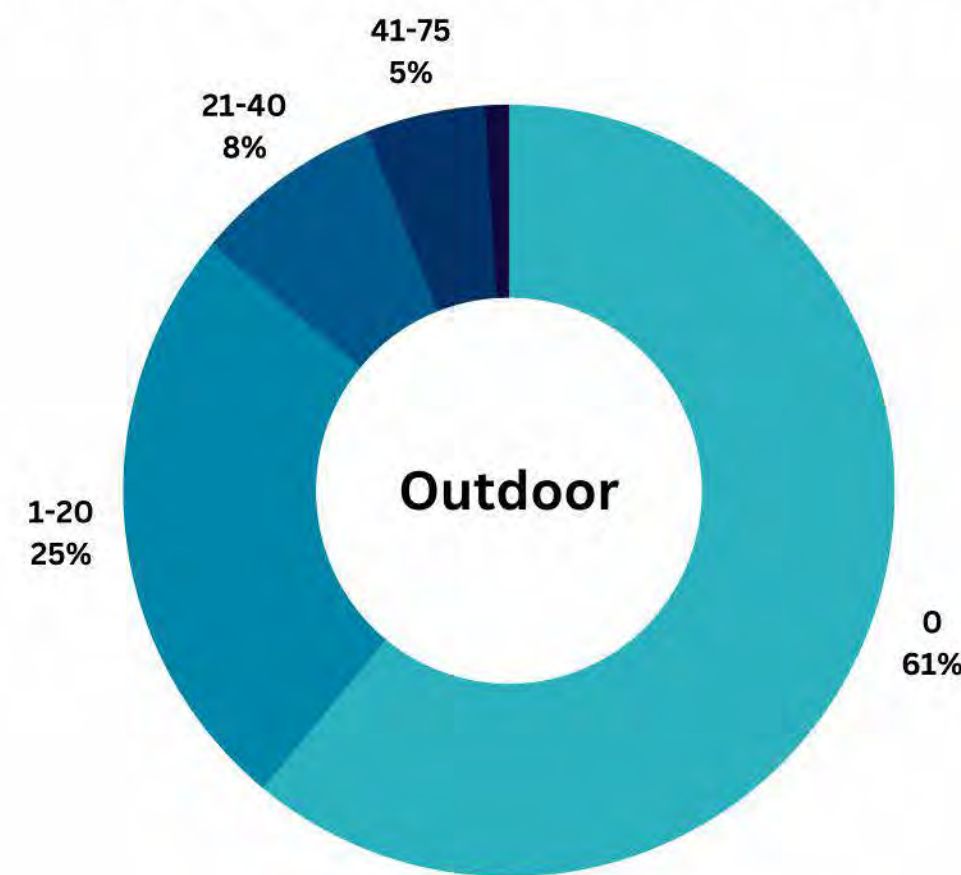
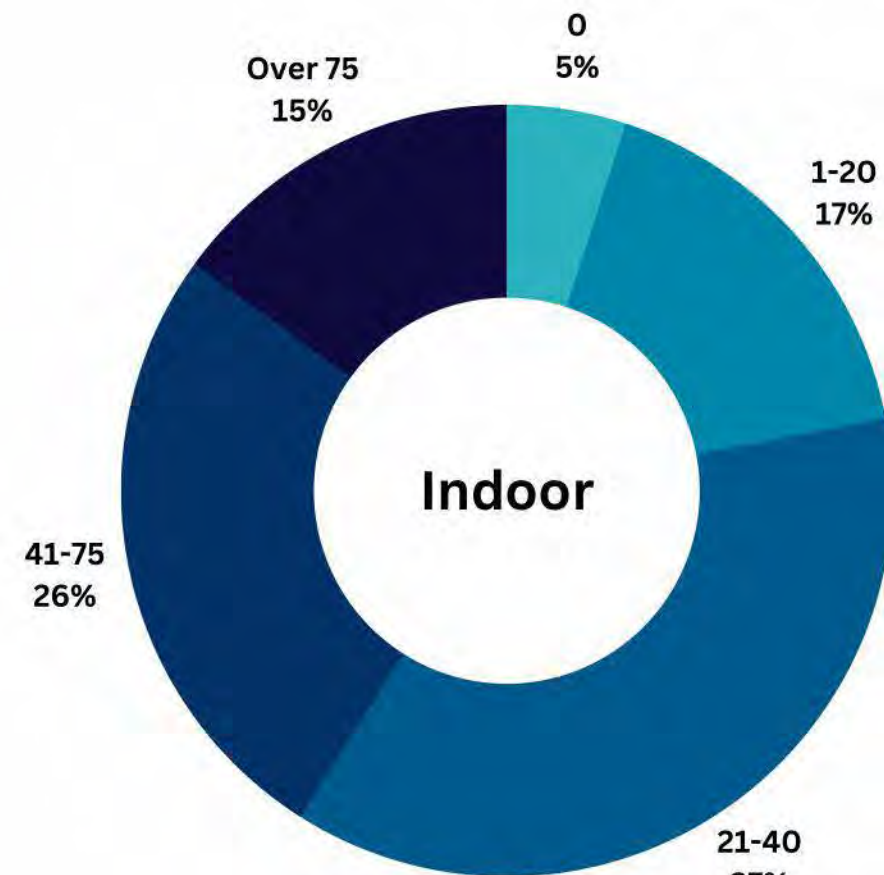
Total
25



Average Staff Levels	Up to \$250,000	\$250,000 - \$500,000	Over \$500,000	No parking spaces	1 to 2 spaces	3 or more spaces	All
Full-time	10	11	21	17	12	13	14
Part-time	10	9	16	14	10	11	11
Total staff	20	20	37	31	22	24	25



CaféTO Seating Capacity by Participating Restaurants



Average Seating
per Participant

Indoor
55

Outdoor
11

CaféTO
27

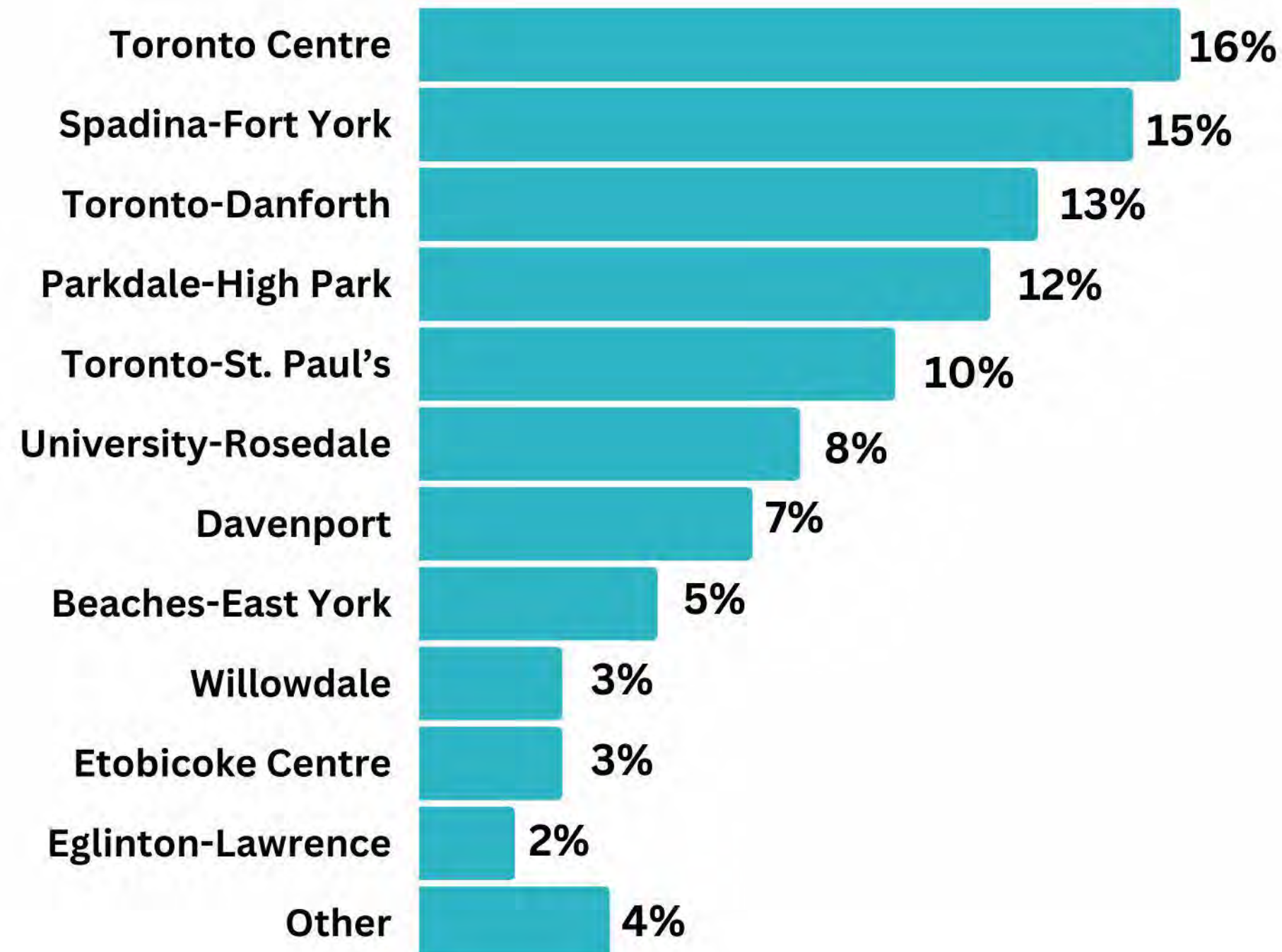
Total
93



Average Seating Capacity	Up to \$250,000	\$250,000 - \$500,000	Over \$500,000	No parking spaces	1 to 2 spaces	3 or more spaces	All
Indoor	38	44	95	57	45	59	55
Outdoor	7	10	22	18	7	9	11
CaféTO	23	25	36	26	25	27	27
Total Average	68	79	153	101	77	95	93



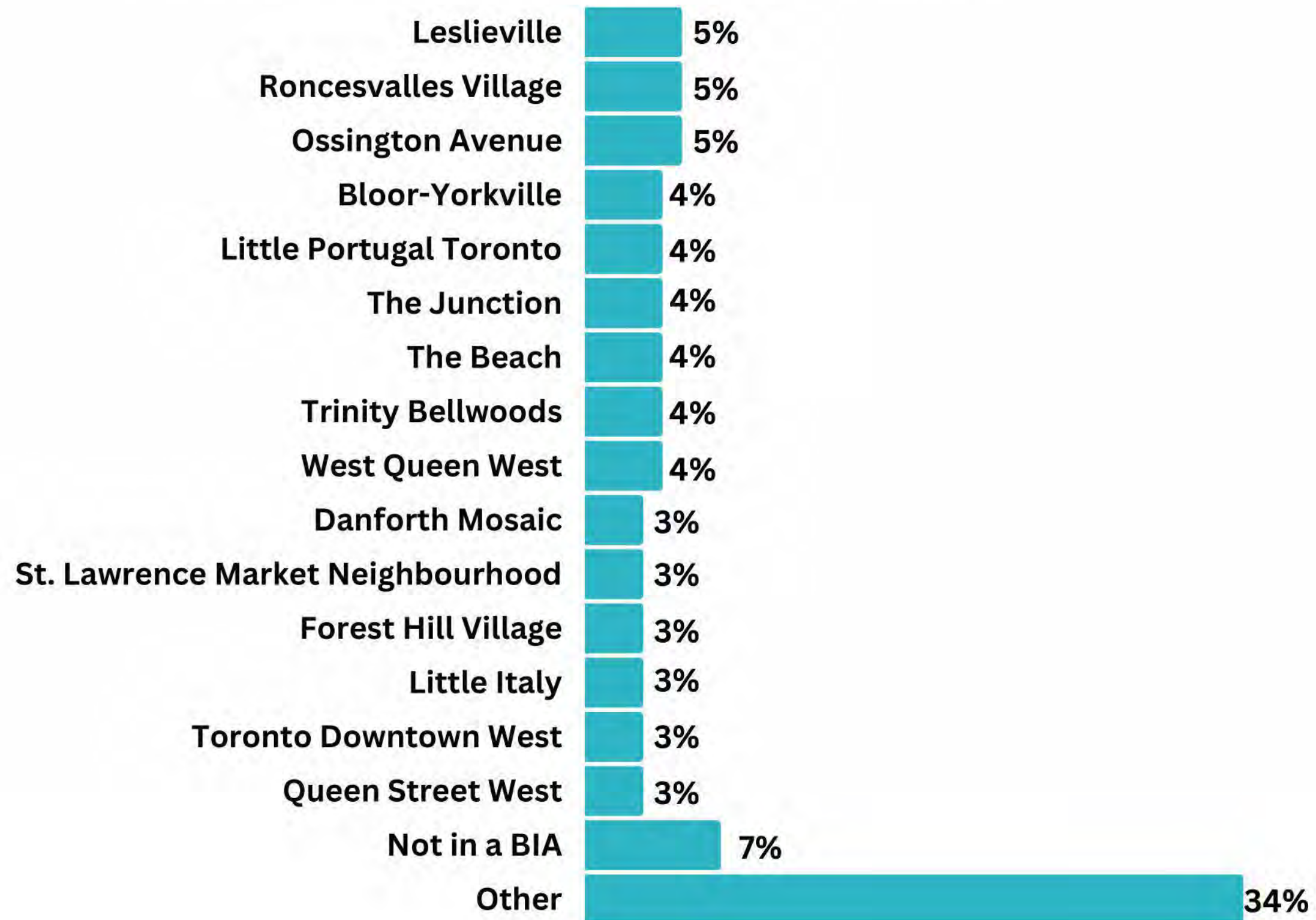
Restaurant Location by Municipal Ward



Restaurant Location by Municipal Ward	Up to \$250,000	\$250,000 - \$500,000	Over \$500,000	No parking spaces	1 to 2 spaces	3 or more spaces	All
Toronto Centre	12%	12%	22%	22%	13%	15%	16%
Spadina-Fort York	18%	14%	16%	22%	10%	15%	15%
Toronto-Danforth	12%	16%	6%	11%	12%	16%	13%
Parkdale-High Park	12%	18%	6%	9%	7%	17%	12%
Toronto-St. Paul's	9%	12%	3%	4%	15%	9%	10%
University-Rosedale	5%	8%	19%	9%	13%	4%	8%
Davenport	11%	4%	6%	4%	10%	5%	7%
Beaches-East York	5%	4%	3%	2%	5%	8%	5%
Willowdale	4%	2%	6%	7%	2%	1%	3%
Etobicoke Centre	2%	6%	3%	2%	3%	3%	3%
Eglinton-Lawrence	2%	0%	3%	4%	2%	4%	2%
Other	2%	2%	3%	4%	3%	1%	3%



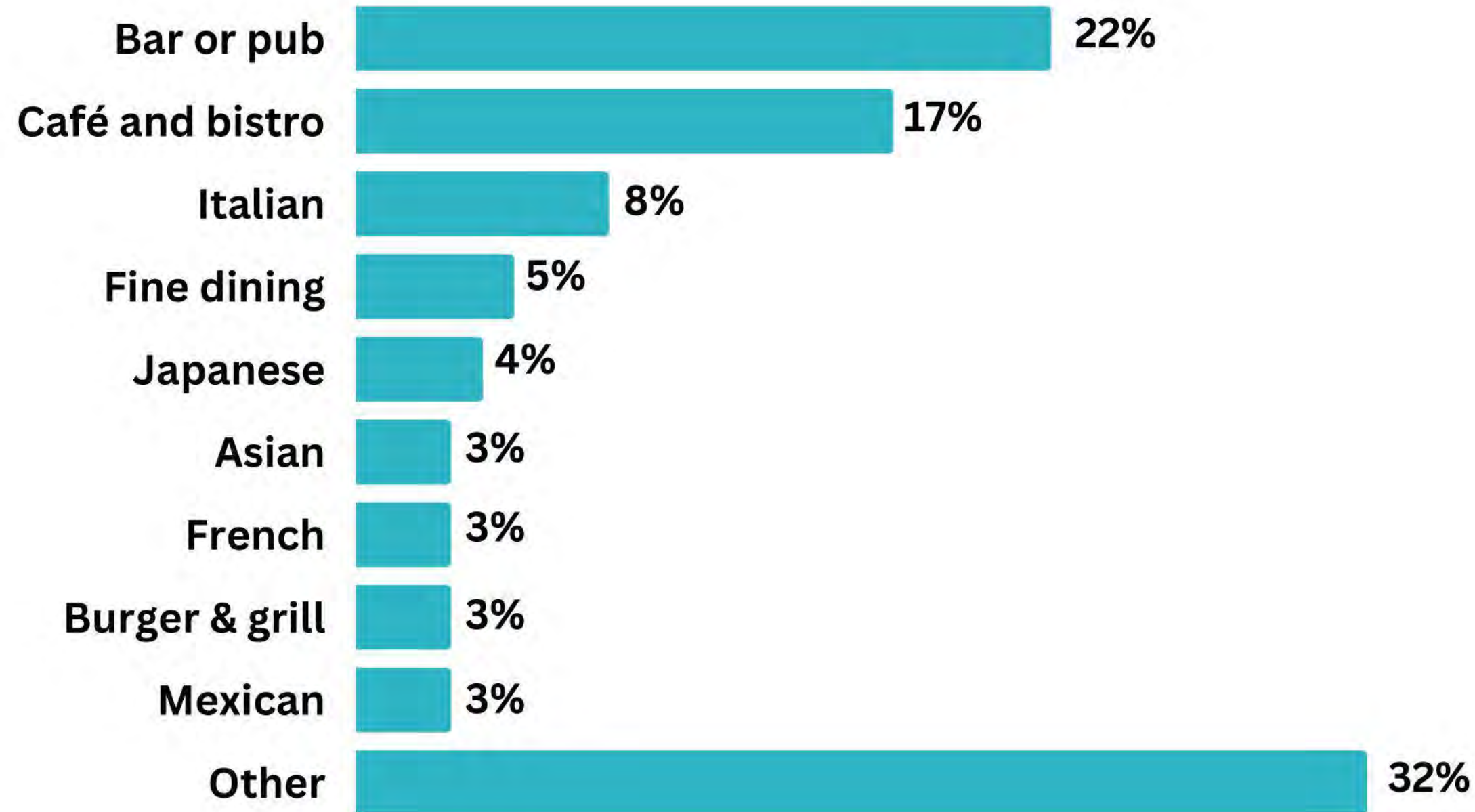
Restaurant Location by BIA



Restaurant Location by BIA	Up to \$250,000	\$250,000 - \$500,000	Over \$500,000	No parking spaces	1 to 2 spaces	3 or more spaces	All
Leslieville	7%	4%	3%	9%	5%	4%	5%
Roncesvalles Village	5%	8%	3%	4%	0%	11%	5%
Ossington Avenue	2%	8%	6%	4%	3%	7%	5%
Bloor-Yorkville	3%	2%	13%	7%	7%	1%	4%
Little Portugal Toronto	9%	6%	0%	4%	7%	3%	4%
The Junction	9%	2%	3%	4%	2%	7%	4%
The Beach	5%	4%	3%	0%	5%	5%	4%
Trinity Bellwoods	5%	6%	0%	2%	7%	3%	4%
West Queen West	2%	4%	13%	11%	3%	0%	3%
Danforth Mosaic	2%	4%	3%	0%	5%	4%	3%
St. Lawrence Market	0%	6%	0%	2%	5%	3%	3%
Forest Hill Village	2%	2%	3%	0%	3%	4%	3%
Little Italy	0%	4%	3%	0%	2%	5%	3%
Toronto Downtown West	3%	0%	3%	7%	0%	1%	3%
Queen Street West	3%	2%	0%	4%	5%	1%	3%
Not in a BIA	9%	8%	3%	9%	11%	3%	7%
Other	35%	29%	41%	33%	31%	38%	34%



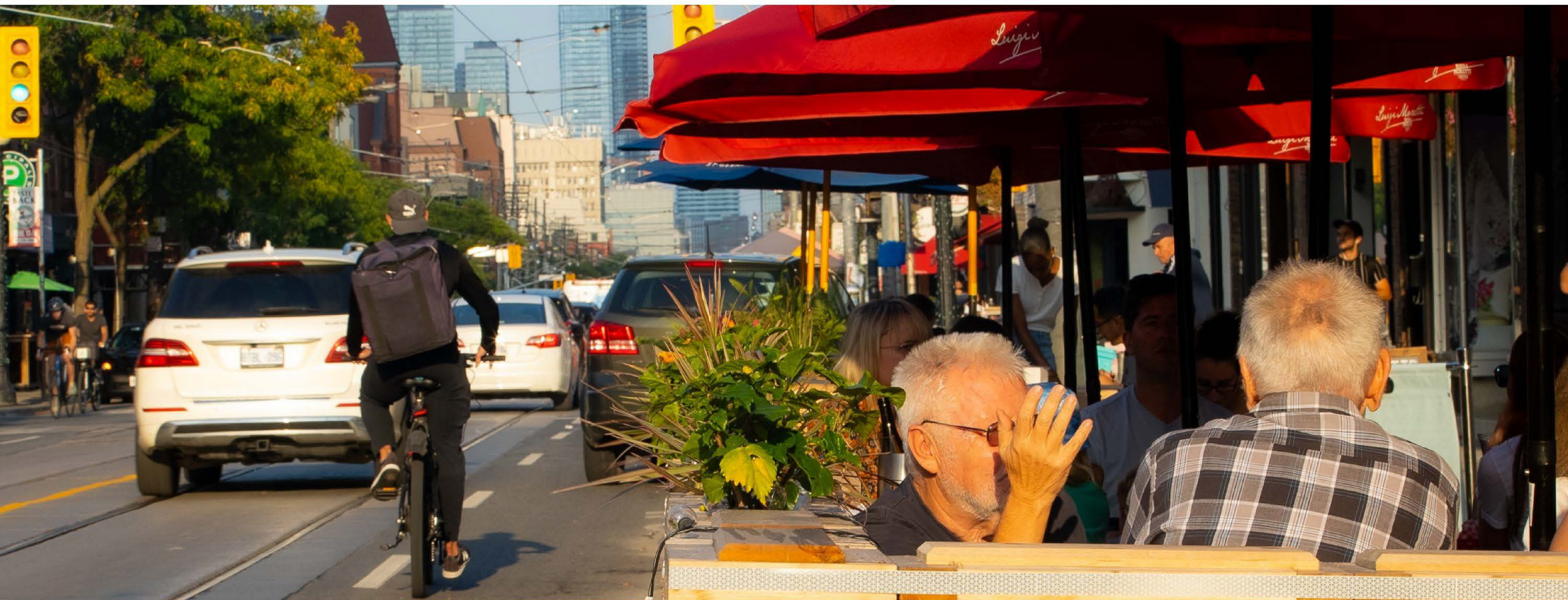
Type of Restaurant



Restaurant Type	Up to \$250,000	\$250,000 - \$500,000	Over \$500,000	No parking spaces	1 to 2 spaces	3 or more spaces	All
Bar or pub	29%	10%	28%	29%	20%	19%	22%
Café and bistro	24%	17%	6%	13%	23%	14%	17%
Italian	7%	10%	3%	4%	8%	10%	8%
Fine dining	3%	4%	13%	2%	3%	8%	5%
Japanese	3%	2%	6%	7%	5%	1%	4%
Asian	3%	4%	3%	0%	3%	6%	3%
French	0%	4%	6%	2%	5%	1%	3%
Burger and grill	3%	2%	3%	4%	2%	3%	3%
Mexican	3%	4%	0%	2%	3%	3%	3%
Other	22%	42%	31%	36%	28%	35%	32%



Section 6: Comments and Suggestions from Participants



Comments about Fees and Costs

"After two years of being open and closed, it will take many years to make up for all the closures. CaféTO will help but with a fee and the labour cost, it will make a lot of places to close down. Everyone is struggling to pay bills." (Bar or pub, Toronto-Danforth)

"Fantastic program and makes the city more vibrant. Businesses are still hurting and recuperating from Covid-19 closures and any additional fees or higher incurred costs makes that process more difficult. My business is in debt \$60,000 because of closures. Keep Patio T.O. free for all those participating for another 5 years minimum" (Bar or pub, University-Rosedale)

"Getting decking built was prohibitively expensive even with the 50% program " (Bar or pub, Don Valley East)

"If there is a cost associated with participating in the future, better barriers between patios and traffic need to be provided. And ramps (accessibility is a necessity) must be included again as in 2021. Thanks!" (Restaurant, Parkdale-High Park)

"If there is a fee, I would base it on the type of CaféTO permit needed. Smaller business don't need on-street patios, so the fee (if any) should be lower." (Café and bistro, Toronto-Danforth)



Comments about Fees and Costs

"It cost us a fortune to buy and make a beautiful patio for our customers. Then the cost of breaking it down and storing it for the winter, then the cost of rebuilding it and moving expenses etc. are a lot. I would be dismayed to have to pay a fee to participate..." *(Latin restaurant, Spadina-Fort York)*

"Please do not turn CaféTO into an additional revenue stream for the city. Keep it free or as low cost as possible."
(Restaurant, Davenport)

"Please don't charge too much we are in a terrible recession. We are struggling and the summer can save us and many restaurants in the beach. The beach makes money in the summer time for the rest of the year" *(Mexican restaurant, Beaches-East York)*

"We understand that there may be a cost associated with CaféTO for the following year, however, we all must understand that restaurants already work on razor thin margins. It cost our business close to 20K in expenditures just to set up the patio and that doesn't even take into account all hiring costs associated with staffing. It would not be helpful if the cost was exorbitant (anything over \$1,000/month in our opinion is exorbitant)." *(French restaurant, University-Rosedale)*



Comments about Blocks and Pylons

"Concrete blocks were unnecessarily large and very ugly. They also took up space that could otherwise have been used for more tables." *(Italian restaurant, Spadina-Fort York)*

"The current barriers, signage, pylons etc. that the city deploys to cordon off curbside patios need to change. They are an eyesore and serve to detract from these patios that otherwise add to the vibrancy of urban city life." *(Fine dining, University-Rosedale)*

"It's a wonderful program and like many things can be improved but it's in its first stages. The concrete blocks can be better done to not create a concrete jungle. Also the fencing options to do with city are too generic and should have different options. All in all it's a program we feel should continue to grow and provides an opportunity for businesses to get creative. Nothing is perfect so we should try to continue this dialogue to get to the best situation possible." *(Restaurant, Spadina-Fort York)*

"Please let's omit the concrete blocks and orange pylons as a permanent feature." *(Italian restaurant, University-Rosedale)*



Comments about Blocks and Pylons

"The cement blocks are ugly and block off more parking than necessary."

"The orange pylons are a disgrace, we need our CaféTO to more closely mimic NYC." *(Café and bistro, Spadina-Fort York)*

"Would be great not to see concrete blocks and orange pylons anymore." *(Vegetarian restaurant, Davenport)*

"Would love to see the city make the cement blocks prettier and more reflective for cars. A lot of us used Griplock for extra security and uniformity; it would be great to have those costs offset by the city." *(Indonesian, Toronto-St. Paul's)*



Comments Regarding Interaction with City or BIA

"Communicate when the patios will be set up by the city. We had no idea when we would be able to start service on the patio which makes planning and staffing difficult. Also, our area does not have a BIA and it appeared the city dropped off planters for patios in some areas but not others. We learned later that this is due to the BIA in that area. Why is this? Should it not be an equal playing field? I noticed some establishments on Queen Street were not even using the planters, we certainly could have used them." *(Latin restaurant, Spadina-Fort York)*

"I believe there is a lack of consistency and communication between the city and the many dozens of neighbourhoods and BIAs that make this such a wonderful city to live in." *(Bar, Spadina-Fort York)*

"I think the biggest help would be to know is CaféTO going to be permanent with 100% guarantee and if so what are the cost going to be from the city. This would allow me to feel confident in investing in fencing and other things to improve the look of the space and feel of the neighbourhood. It would also be helpful if we knew what kind of fencing we can install and not have to use an architect for the drawings. It would also help if we were giving drawings of the space that we are allowed to occupy so when we submit drawings for fence permits we know where we can install the fence. " *(Fine dining, University-Rosedale)*

"Make it easier to obtain the permit. I submitted my application 5 times, each time being told of something else to change. Why wouldn't I have been told of all the things once instead of 5 separate times? It's so inefficient it's a joke"



Comments Regarding Interaction with City or BIA

"Please work together with businesses and BIAs to find a common workable program. The last two years of the CaféTO program did NOT generate revenue for businesses that had their patios located further from their establishments. It WASN'T feasible/cost effective to generate revenue with the extra staffing for the program." *(Bar or pub, Toronto Centre)*

"Simplify application process. Give reminders about deadlines for applications" *(Burger and grill Restaurant, Toronto-Danforth)*

"There has been very little interaction on the CaféTO Grant, which we did apply for. We don't know if we qualified or not. No timeline was offered, or correspondence or feedback of this grant program. I'd like better support from the BIA org or city on whether they are continuing with the grant. Further guidance would be helpful." *(Restaurant, Davenport)*

"We joined too late to take advantage of the grant to build a platform and fencing but this would be super helpful in the future." *(Vegetarian restaurant, Beaches-East-York)*

"Would love more notice regarding when we can operate the curb patio so we can hire and train staff. Not a week before more like a month." *(Restaurant, Toronto Centre)*

"Would like to know the day we start at least a month in advance so we can hire and train our new staff." *(Etobicoke-Lakeshore, Fine dining)*



Other Comments

"Amazing program, helped business so much. No one has a single negative thing to say about the program. Please continue with the program even if there is a cost to businesses. It has a huge positive impact on the city and small businesses. Don't need any additional support, what you did was perfect." (Restaurant, Spadina-Fort York)

"Easily the single most successful program for the industry. It has become absolutely crucial for us." (Bar or pub, Spadina-Fort York)

"If this will be permanent, make it easier for restaurants to move from curb to existing building property. In other words, to make changes that have simplified ML&S and AGCO approvals where such changes would allow the city to keep the existing street parking." (Bar or pub, Spadina-Fort York)

"Make these sidewalk cafés a permanent fixture. They help make Toronto more vibrant and it's a nice unique feature for a North American city." (Café and bistro, Toronto-St. Paul's)

"Review how patios are set up based on street location. Remove barriers for restaurants not utilizing their cafe roadside as this becomes a bit missing with all the cones all over the road and walkways. Restaurant should be allowed to cover flooring with grass, as grass is not an hindrance to accessibility. Should be allowed to set up a flooring/deck on roadside of a certain height without having to pay for expensive drafts and approvals." (Restaurant, Toronto Centre)



Other Comments

"The CaféTO program is an integral part of our business. The majority of customers are uncomfortable sitting indoors and the outdoor patios are the only way to keep my staff employed." *(Bar or pub, Parkdale-High Park)*

"The continuation of CaféTO is integral to our existence. Our patio creates jobs and gives us the revenue we need to pay off debts incurred by Covid" *(Bar or pub, Toronto-Danforth)*

"This program takes away parking spaces already squeezed by bike lane. Furthermore this program must be designed to let families enjoy outdoor sitting and not to be extended to bar hours till 2 in the morning with noise. And lastly there was an establishment that did not use the space all summer, but we lost the parking space that was beneficial to others"

"This year there were grants and/or subsidies available for purchasing fencing etc. Similar programs should be made available for rentals (e.g. GripBlok). Most small restaurants do not have space to store these installations and their only option is to rent." *(Seafood restaurant, Parkdale-High Park)*

"We need CaféTO to keep going, it makes a huge difference for my business and the street comes alive like never before" *(Mexican restaurant, Parkdale-High Park)*

