

DESTINATION
TORONTO

MARKET READINESS INDEX

Data through June 2, 2021



MARKET READINESS INDEX

OBJECTIVE:

Identify and consolidate market signals and leading indicators to assess the readiness of key source markets for Toronto's visitor economy.

This assessment – and the underlying data that powers it – enables informed decisions on the timing and approach to reactivate sales and marketing in key markets.

MARKET READINESS INDEX

6



5

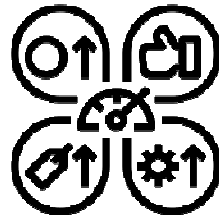


3

Markets



Factors



Levels



6 MARKETS

<i>HYPERLOCAL</i>	Toronto, GTA residents
<i>REGIONAL DRIVE</i>	2-hour distance (London, Barrie, Hamilton)
<i>INTRA-PROVINCIAL</i>	Rest of Ontario
<i>INTER-PROVINCIAL</i>	Rest of Canada, non-Ontario residents
<i>U.S.</i>	All U.S. markets
<i>INTERNATIONAL</i>	All international markets beyond U.S.

5 READINESS FACTORS

VIRUS CONTROL Readiness

DESTINATION Readiness

ACCESS Readiness

PARTNER Readiness

CUSTOMER Readiness



Case count

Vaccination progress

5 READINESS FACTORS

VIRUS CONTROL Readiness

DESTINATION Readiness 

ACCESS Readiness

PARTNER Readiness

CUSTOMER Readiness

**State of restrictions
What's open?
How open?
Resident sentiment**

5 READINESS FACTORS

VIRUS CONTROL Readiness

DESTINATION Readiness

ACCESS Readiness

PARTNER Readiness

CUSTOMER Readiness



**Entry restrictions
Outbound/Return
restrictions
Flight availability**

5 READINESS FACTORS

VIRUS CONTROL Readiness

DESTINATION Readiness

ACCESS Readiness

PARTNER Readiness

CUSTOMER Readiness



Marketing/sales activity

5 READINESS FACTORS

VIRUS CONTROL Readiness

DESTINATION Readiness

ACCESS Readiness

PARTNER Readiness

CUSTOMER Readiness 

Safety sentiment
Travel search
Booked travel

3 READINESS LEVELS



STATUS

- Closed
- Unavailable
- Low demand
- Bottom 40%

ACTION

- Hold and monitor



STATUS

- Clear shift
- Path to opening
- Increased demand
- Middle 20%

ACTION

- Plan and prepare to restart engagement



STATUS

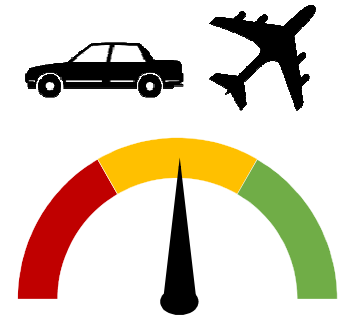
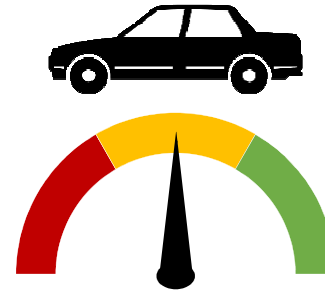
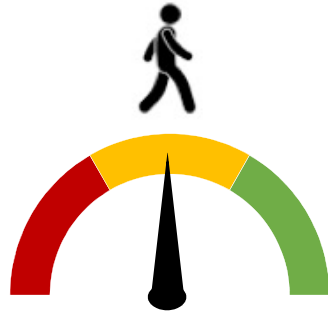
- Open
- Imminently open
- Meaningful demand
- Top 40%

ACTION

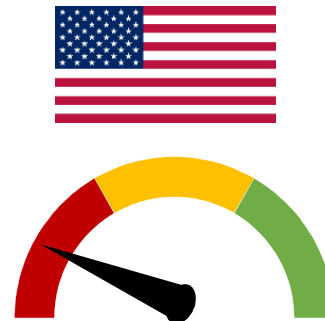
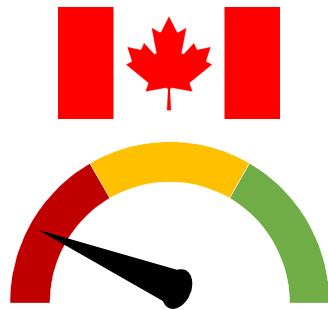
- Active sales and marketing

READINESS SUMMARY – June 2

Short-haul

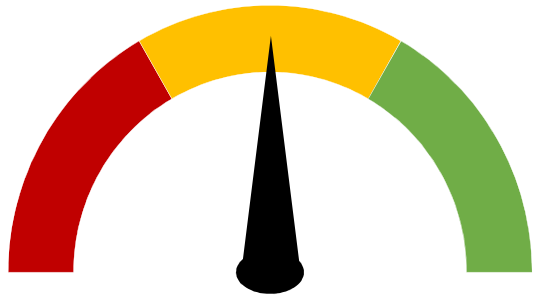


Long-haul

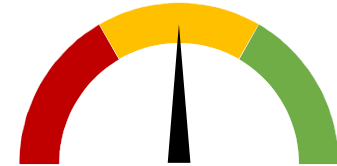




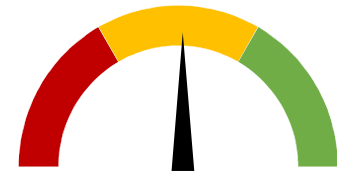
HYPER-LOCAL



***VIRUS CONTROL
Readiness***



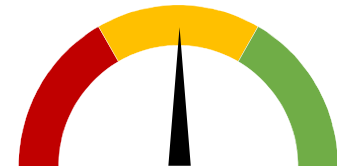
***DESTINATION
Readiness***



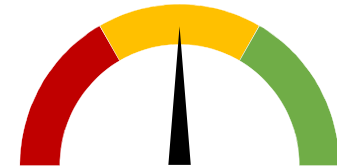
***ACCESS
Readiness***



***PARTNER
Readiness***



***CUSTOMER
Readiness***



VIRUS CONTROL Readiness

Daily new cases (last 7 day average)
Vaccine rollout (% of population)

234	
61.40% (at least 1 Dose)	6.70% (2 doses)

DESTINATION Readiness

Public health measure
Restaurants
Attractions
Business events/Meetings
Live Spectator Events
Events outdoor
Resident welcome sentiment

Reopening Phase 1 – June ▲
Patios to open phase 1 ▲
Closed
Prohibited
Prohibited
Prohibited
N/A

*Phase 1
expected by
mid-June*

ACCESS Readiness

Entry permission
Entry restrictions
Home quarantine requirements

None ▲
None ▲
None

*Stay-at-home
order lifted*

PARTNER Readiness

Destination Canada
Destination Ontario
City of Toronto

Late summer

*Resumption of
ShowLoveTO*

CUSTOMER Readiness

Comfortable - Restaurants
Comfortable - Bars
Comfortable – Live Events
Comfortable – Shopping Malls
Travel Within 30 km
DC Domestic Travel Assessment

54 %
23 %
28 %
65 % ▲
17 %
Hyper-local

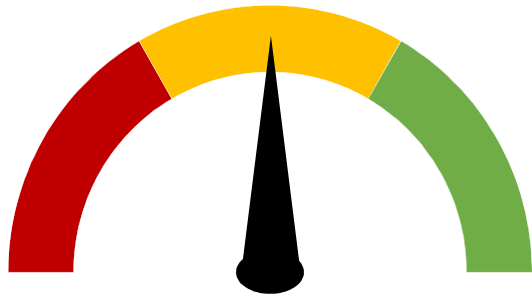
*Highest comfort
with shopping*

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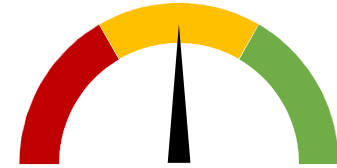




REGIONAL DRIVE



***VIRUS CONTROL
Readiness***



***DESTINATION
Readiness***



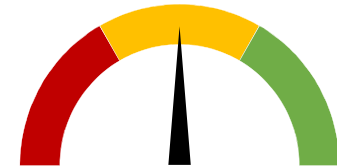
***ACCESS
Readiness***



***PARTNER
Readiness***



***CUSTOMER
Readiness***



VIRUS CONTROL Readiness

DESTINATION Readiness



REGIONAL
DRIVE

ACCESS Readiness

PARTNER Readiness

CUSTOMER Readiness

Daily new cases (last 7 day average)
Vaccine rollout (% of population)

596	
58.77% (at least 1 Dose)	5.67% (2 doses)

Public health measure
Restaurants
Attractions
Business events/Meetings
Live Spectator Events
Events outdoor
Resident welcome sentiment

Reopening Phase 1 – June ▲
Patios to open in Phase 1 ▲
Closed
Prohibited
Prohibited
Prohibited
49 %

*Phase 1
expected by
mid-June*

Entry permission
Entry restrictions
Home quarantine requirements

None ▲
None ▲
None

Destination Canada
Destination Ontario

No timing announced

Comfortable - Restaurants
Comfortable - Bars
Comfortable – Live Events
Comfortable – Shopping Malls
Travel to City Destination
Search Interest – General Travel
Search Interest – Toronto Travel
DC Domestic Travel Assessment

69 %
36 %
43 % ▲
74 %
13 %
-48 %
-67 %
Hyper-local

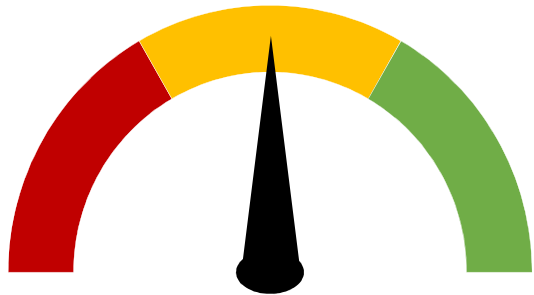
*Restaurants,
shopping lead*

*City interest
still low*

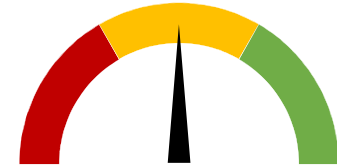
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INTRA- PROVINCIAL



***VIRUS CONTROL
Readiness***



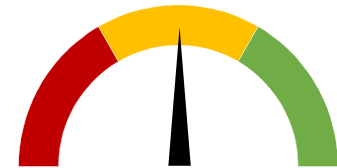
***DESTINATION
Readiness***



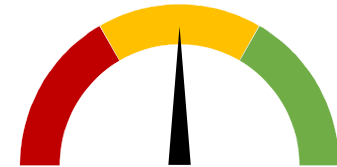
***ACCESS
Readiness***



***PARTNER
Readiness***

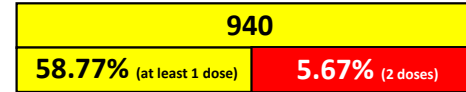


***CUSTOMER
Readiness***



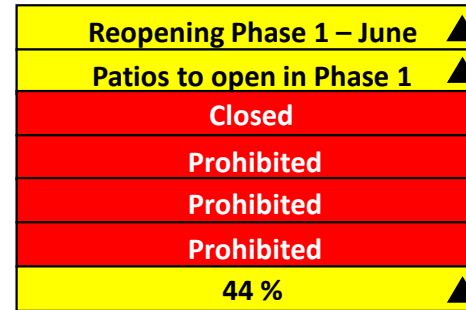
VIRUS CONTROL Readiness

Daily new cases (last 7 day average)
Vaccine rollout (% of population)



DESTINATION Readiness

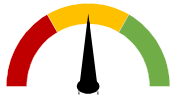
Public health measure
Restaurants
Attractions
Business events/Meetings
Live Spectator Events
Events outdoor
Resident welcome sentiment



Patios open in Phase 1

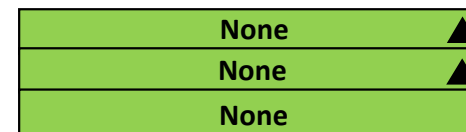


**INTRA-
PROV.**



ACCESS Readiness

Entry permission
Entry restrictions
Home quarantine requirements



Movement in Ont. permitted

PARTNER Readiness

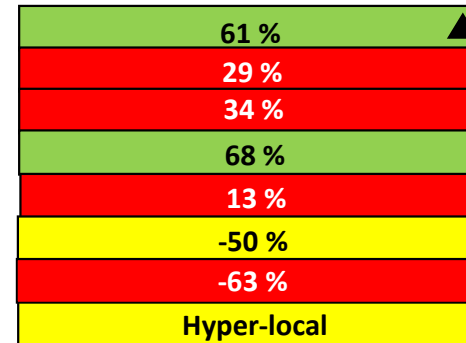
Destination Canada
Destination Ontario



Domestic travel focus

CUSTOMER Readiness

Comfortable - Restaurants
Comfortable - Bars
Comfortable – Live Events
Comfortable – Shopping Malls
Travel to City Destination
Search Interest – General Travel
Search Interest – Toronto travel
DC Domestic Travel Assessment



Current focus still local

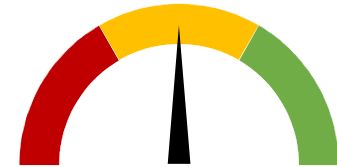
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INTER- PROVINCIAL



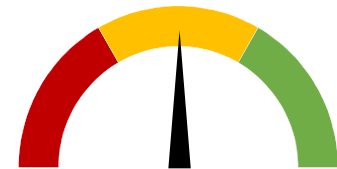
***VIRUS CONTROL
Readiness***



***DESTINATION
Readiness***



***ACCESS
Readiness***



***PARTNER
Readiness***



***CUSTOMER
Readiness***



VIRUS CONTROL Readiness

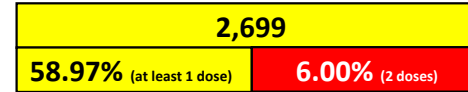
DESTINATION Readiness

ACCESS Readiness

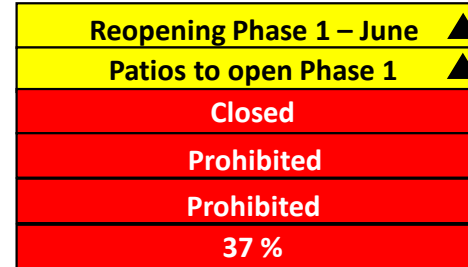
PARTNER Readiness

CUSTOMER Readiness

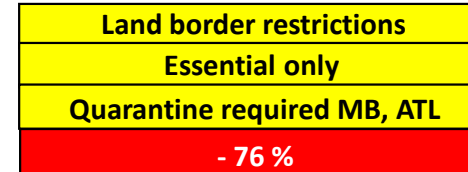
Daily new cases (last 7 day average)
Vaccine rollout (% of population)



Public health measure
Restaurants
Attractions
Business events/Meetings
Live Spectator Events
Resident welcome sentiment



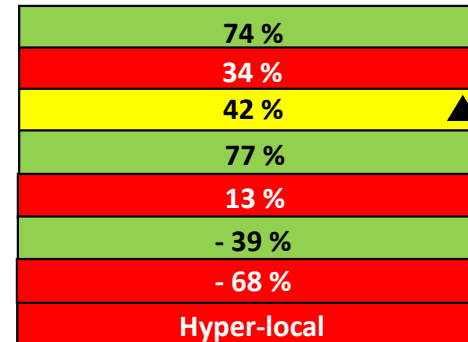
Entry permission
Entry restrictions
Home quarantine requirements
Available flight capacity



Destination Canada
Destination Ontario



Comfortable - Restaurants
Comfortable – Live Events
Comfortable – Plane
Comfortable – Shopping Mall
Travel to City Destination
Search Interest – General Travel
Search Interest – Toronto Travel
DC Domestic Travel Assessment



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Restrictions remain

Reduced air capacity

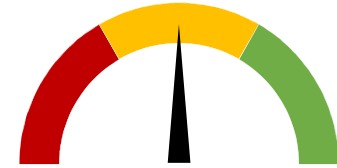
Comfort with air travel up



U.S.



***VIRUS CONTROL
Readiness***



***DESTINATION
Readiness***



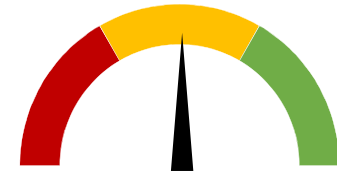
***ACCESS
Readiness***



***PARTNER
Readiness***



***CUSTOMER
Readiness***



VIRUS CONTROL Readiness

DESTINATION Readiness

ACCESS Readiness

PARTNER Readiness

CUSTOMER Readiness



U.S.



Daily new cases (last 7 day average)
Vaccine rollout (% of population)

16,239	
50.45 % (at least 1 dose)	40.71 % (2 doses)

Public health measure
Restaurants
Attractions
Business events/Meetings
Live Spectator Events
Resident welcome sentiment

Reopening Phase 1 – June ▲
Patios to open Phase 1 ▲
Closed
Prohibited
Prohibited
20 %

Significant host reluctance

Entry permission
Entry restrictions
Home quarantine requirements
Available flight capacity

Border closed
Quarantine required
CDC Travel Advisory
- 96 %

Strict 14-day rules

Destination Canada
Destination Ontario

Feel safe to travel
Next 3 months - Travel
Next 3 months – NO Hotel
Next 3 months – NO Plane
Search Interest – General Travel
Search Interest – Toronto Travel

72 %
54 %
40 %
49 %
21 %
- 78 %

Domestic travel returning

▲▼ Change since prior index



INTER- NATIONAL



***VIRUS CONTROL
Readiness***



***DESTINATION
Readiness***



***ACCESS
Readiness***



***PARTNER
Readiness***



***CUSTOMER
Readiness***



VIRUS CONTROL Readiness

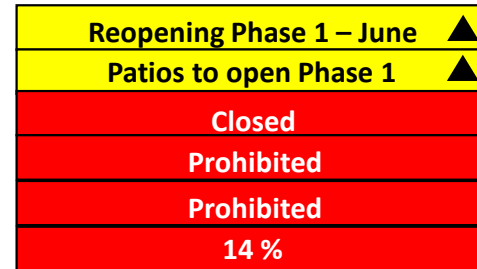
Daily new cases (last 7 day average)
Vaccine rollout (% of population)



Track by country

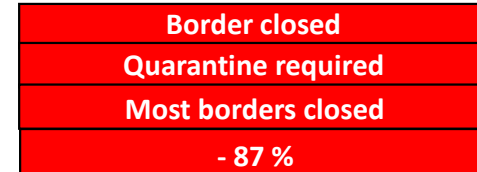
DESTINATION Readiness

Public health measure
Restaurants
Attractions
Business events/Meetings
Live Spectator Events
Resident welcome sentiment



ACCESS Readiness

Entry permission
Entry restrictions
Home quarantine requirements
Available flight capacity



Varies; key markets closed

PARTNER Readiness

Destination Canada
Destination Ontario



CUSTOMER Readiness

Search Interest – General Travel



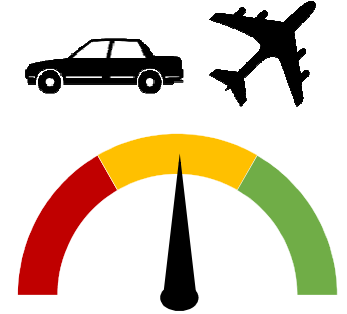
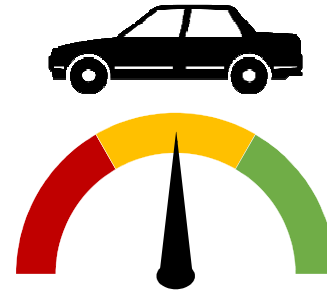
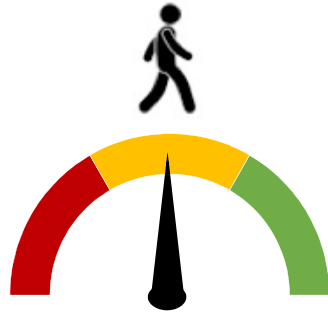
Highly market dependent

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READINESS SUMMARY – June 2

Short-haul



Long-haul

