

DESTINATION
TORONTO

MARKET READINESS INDEX

Data through August 16, 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

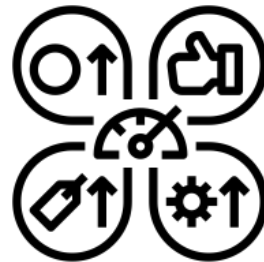


3

Markets



Factors



Levels



6 MARKETS

HYPERLOCAL

Toronto, GTA residents

REGIONAL DRIVE

2-hour distance (London, Barrie, Hamilton)

INTRA-PROVINCIAL

Rest of Ontario

INTER-PROVINCIAL

Rest of Canada, non-Ontario residents

U.S.

All U.S. markets

INTERNATIONAL

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

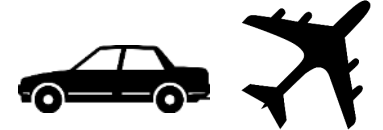
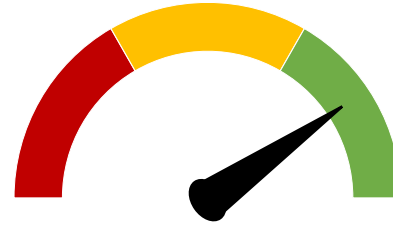
- Open
- Imminently open
- Meaningful demand
- Top 40%

ACTION

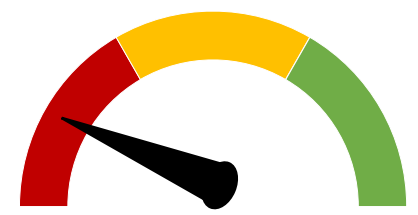
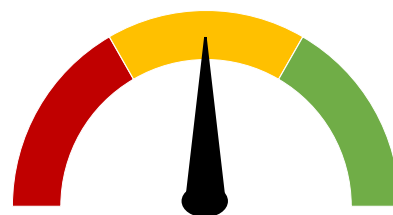
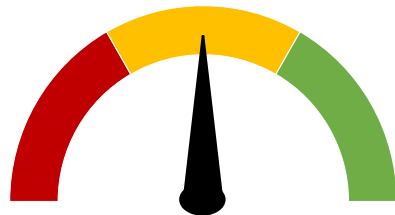
- Active sales and marketing

READINESS SUMMARY – August 16

Short-haul



Long-haul

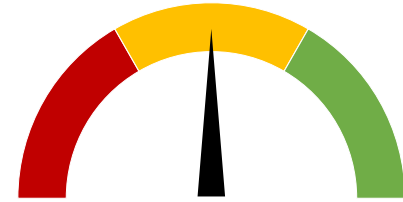




HYPER-LOCAL



***VIRUS CONTROL
Readiness***



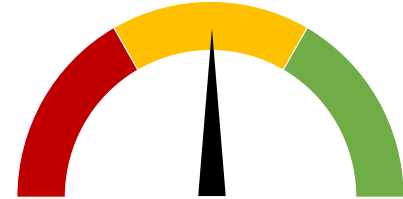
***DESTINATION
Readiness***



***ACCESS
Readiness***



***PARTNER
Readiness***



***CUSTOMER
Readiness***



VIRUS CONTROL Readiness

DESTINATION Readiness

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

123	
72.30% (at least 1 Dose)	65.30% (2 doses)

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

Reopening Step 3
No restrictions
Up to 50% capacity indoor
Up to 50% capacity
Up to 50% capacity indoor
Up to 75% capacity
N/A

*Holding at
Step 3*

Entry permission
Entry restrictions
Home quarantine requirements

None
None
None

No restrictions

ACCESS Readiness

PARTNER Readiness

Destination Canada
Destination Ontario
City of Toronto

ShowLoveTO

*September
activity planned*

CUSTOMER Readiness

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

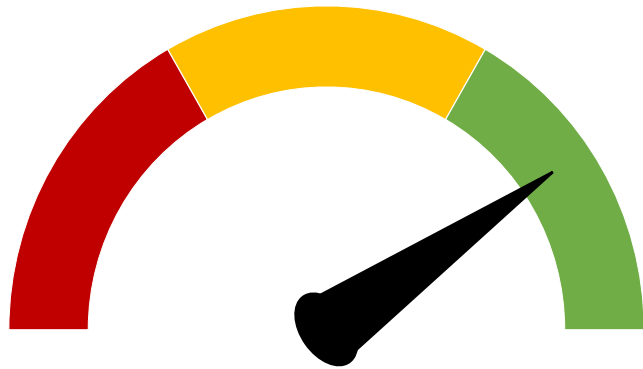
57 % ▼
22 %
30 %
64 %
Intra-provincial

*Highest comfort
with shopping*

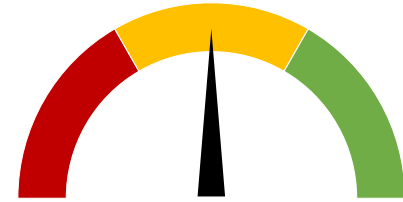




REGIONAL DRIVE



***VIRUS CONTROL
Readiness***



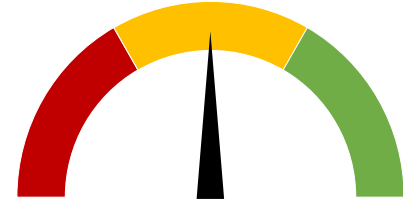
***DESTINATION
Readiness***



***ACCESS
Readiness***



***PARTNER
Readiness***



***CUSTOMER
Readiness***



VIRUS CONTROL Readiness

DESTINATION Readiness

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

249	
71.88% (at least 1 Dose)	64.80% (2 doses)

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

Reopening Step 3
No restrictions
Up to 50% capacity indoor
Up to 50% capacity
Up to 50% capacity indoor
Up to 75% capacity
67%

*Holding at
Step 3*

Entry permission
Entry restrictions
Home quarantine requirements

None
None
None

ACCESS Readiness

PARTNER Readiness

Destination Canada
Destination Ontario

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

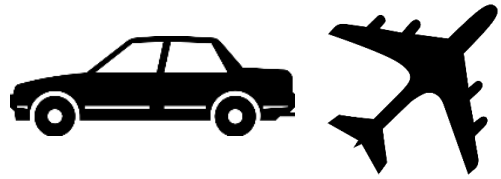
59 %	▼
19 %	
29 %	
67 %	
13 %	
-12 %	▲
Intra-provincial	

*Comfort with
some key
activities slipping*

*Travel search
close to normal*

CUSTOMER Readiness

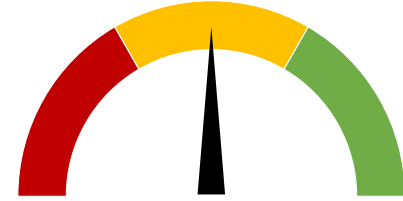




INTRA- PROVINCIAL



***VIRUS CONTROL
Readiness***



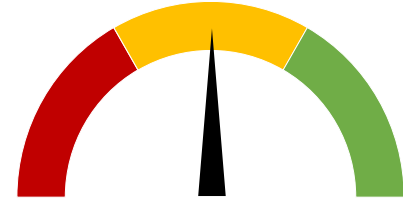
***DESTINATION
Readiness***



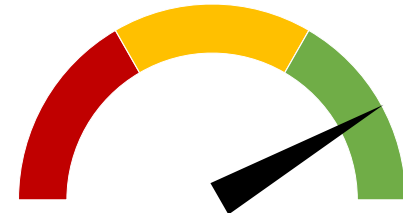
***ACCESS
Readiness***



***PARTNER
Readiness***



***CUSTOMER
Readiness***



VIRUS CONTROL Readiness

DESTINATION Readiness



INTRA-
PROV.



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
Events outdoor
Resident welcome sentiment

Entry permission
Entry restrictions
Home quarantine requirements

Destination Canada
Destination Ontario

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

434	
71.88% (at least 1 dose)	64.80% (2 doses)

Reopening Step 3
No restrictions
Up to 50% capacity indoor
Up to 50% capacity
Up to 50% capacity indoor
Up to 75% capacity
66 %

*Step 3 in effect
July 16th*

None
None
None

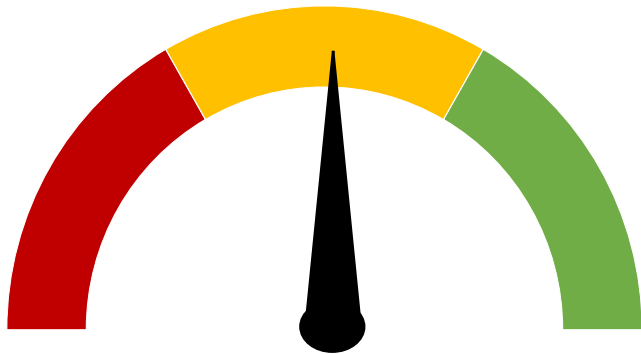
*Domestic travel
focus*

76 %
33 %
41 %
79 %
18 %
-14 % ▲
Intra-provincial

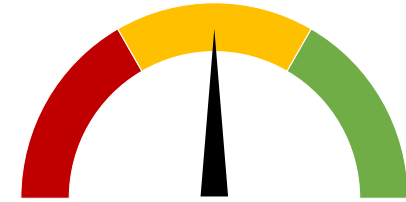
*Increase in Toronto
travel search*



INTER- PROVINCIAL



***VIRUS CONTROL
Readiness***



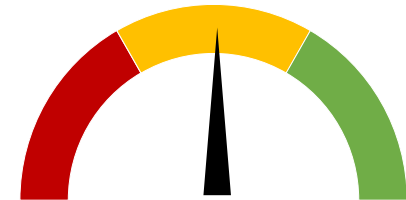
***DESTINATION
Readiness***



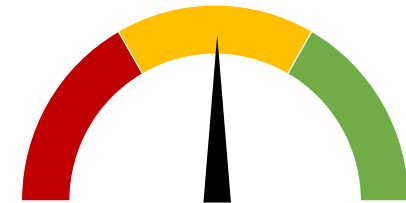
***ACCESS
Readiness***



***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
Search Interest – General Travel
Search Interest – Toronto Travel
DC Domestic Travel Assessment

1,733	
72.49% (at least 1 dose)	63.42% (2 doses)

Reopening Step 3
No restrictions
Up to 50% capacity indoor
Up to 50% capacity
Up to 50% capacity indoor
58 % ▼

*Slight increase in
hesitancy*

Open
Open
None
- 76 %

*For fully vaccinated
travellers*

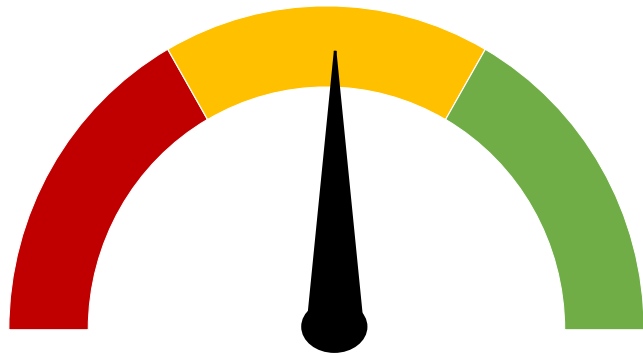
79 %
43 %
46 %
81 %
24 %
7 %
Inter-provincial ▲

*Comfort with
air travel up*

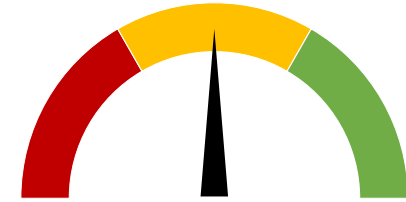




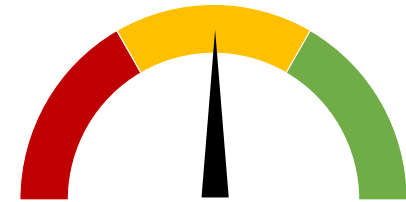
U.S.



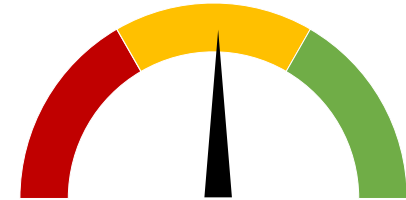
***VIRUS CONTROL
Readiness***



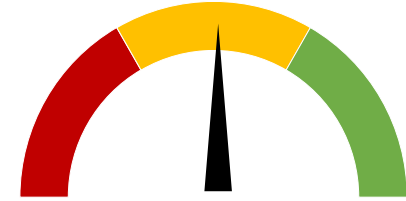
***DESTINATION
Readiness***



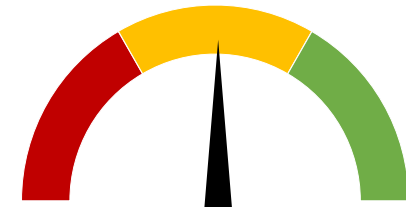
***ACCESS
Readiness***



***PARTNER
Readiness***



***CUSTOMER
Readiness***



VIRUS CONTROL Readiness

DESTINATION Readiness

ACCESS Readiness

PARTNER Readiness

CUSTOMER Readiness

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

Feel safe to travel
Feel safe to travel outside US
Excitement to travel in next month
Feel safe to fly in an airplane
Search Interest – General Travel
Search Interest – Toronto Travel

128,871	
59.02 % (at least 1 dose)	50.14 % (2 doses)

Reopening Step 3
No restrictions
Up to 50% capacity indoor
Up to 50% capacity
Up to 50% capacity indoor
18 %

Open
No quarantine required
CDC Travel Advisory
- 96 %

42 % ▼
25 %
61 %
39 %
-2 %
- 67 %

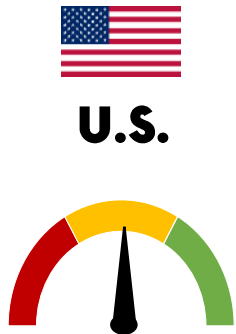
Host reluctance remains

Fully vaccinated visitors

COVID-19 concerns returning

Down 7.5% since mid July

▲▼ Change since prior index





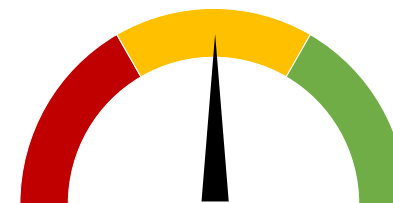
INTER- NATIONAL



***VIRUS CONTROL
Readiness***



***DESTINATION
Readiness***



***ACCESS
Readiness***



***PARTNER
Readiness***



***CUSTOMER
Readiness***



VIRUS CONTROL Readiness

DESTINATION Readiness

ACCESS Readiness

PARTNER Readiness

CUSTOMER Readiness

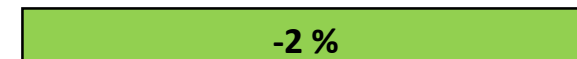
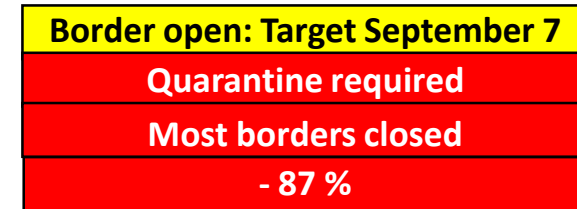
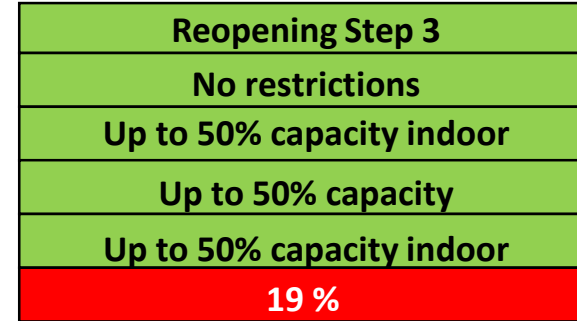
Daily new cases (last 7 day average)
Vaccine rollout (% of population)

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

Search Interest – General Travel

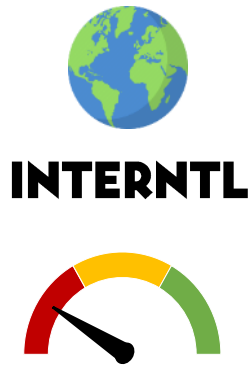


*Track by
country*

*Fully vaccinated
visitors*

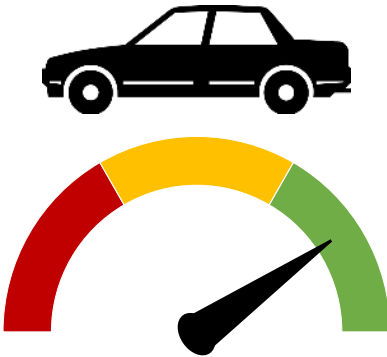
*Highly market
dependent*

▲▼ Change since prior index



READINESS SUMMARY – August 16

Short-haul



Long-haul

