

DESTINATION  
**TORONTO**

# MARKET READINESS INDEX

Data through July 15, 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

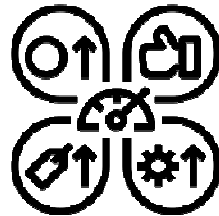


3

Markets



Factors



Levels



## **6 MARKETS**

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

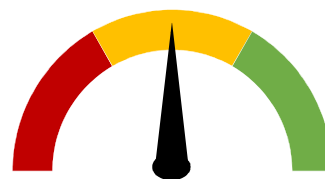
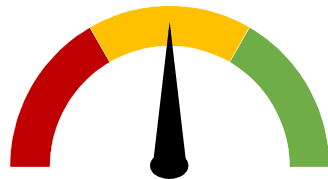
- Active sales and marketing

# READINESS SUMMARY – July 15

***Short-haul***



***Long-haul***

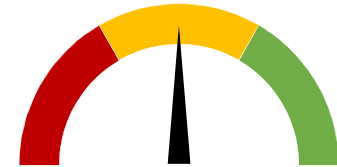




# HYPER-LOCAL



***VIRUS CONTROL  
Readiness***



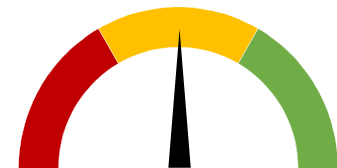
***DESTINATION  
Readiness***



***ACCESS  
Readiness***



***PARTNER  
Readiness***



***CUSTOMER  
Readiness***



## VIRUS CONTROL Readiness

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

29	
79.00% (at least 1 Dose)	63.00% (2 doses)

## DESTINATION Readiness

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	

Step 3 in effect  
July 16th

## ACCESS Readiness

Entry permission  
Entry restrictions  
Home quarantine requirements

None	
None	▲
None	

No restrictions

## 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  
DC Domestic Travel Assessment

63 %
36 %
39 %
74 %
Intra-provincial

Highest comfort  
with shopping

▲▼ Change since prior index

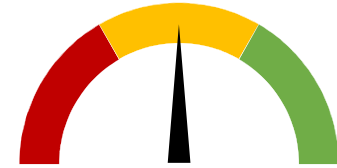




# REGIONAL DRIVE



***VIRUS CONTROL  
Readiness***



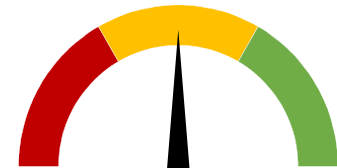
***DESTINATION  
Readiness***



***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)

94	
79.65% (at least 1 Dose)	59.46% (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	▲
77%	▲

*Step 3 in effect  
July 16th*

Entry permission  
Entry restrictions  
Home quarantine requirements

None
None
None

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

63 %	
23 %	
33 %	▼
72 %	
-3 %	▲
-43 %	▲
Intra-provincial	▲

*Restaurants,  
shopping lead*

*Travel search  
back to normal*

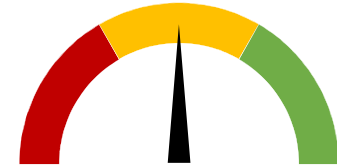
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# INTRA- PROVINCIAL



***VIRUS CONTROL  
Readiness***



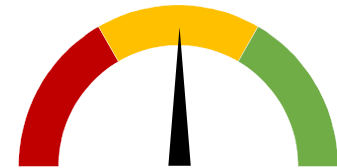
***DESTINATION  
Readiness***



***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)

155	
79.65% (at least 1 dose)	59.46% (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	▲
74 %	▲

*Step 3 in effect  
July 16th*

Entry permission  
Entry restrictions  
Home quarantine requirements

None
None
None

Destination Canada  
Destination Ontario


*Domestic travel  
focus*

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

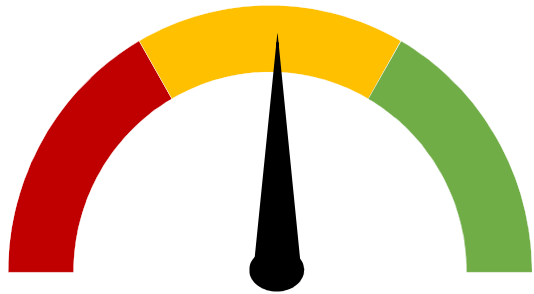
78 %	▲
35 %	
42 %	▲
81 %	
-8 %	▲
-43 %	▲
Intra-provincial	▲

*Increase in Toronto  
travel search*

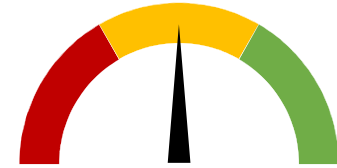
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# INTER- PROVINCIAL



*VIRUS CONTROL  
Readiness*



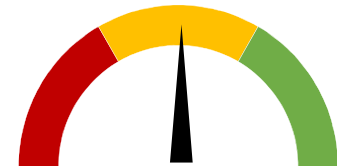
*DESTINATION  
Readiness*



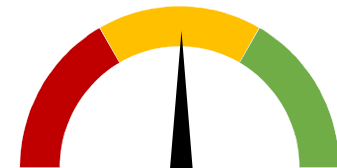
*ACCESS  
Readiness*



*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)

455	
69.81% (at least 1 dose)	46.39% (2 doses)

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

Reopening Step 3	▲
No restrictions	▲
Up to 50% capacity indoor	▲
Up to 50% capacity	▲
Up to 50% capacity indoor	▲
64 %	▲

Resistance to visitors declining

Entry permission  
Entry restrictions  
Home quarantine requirements  
Available flight capacity

Open	▲
Open	▲
None	
- 76 %	

For fully vaccinated travellers

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

81 %	
43 %	▲
43 %	
84 %	
6%	
- 35 %	▲
Intra-provincial	▲

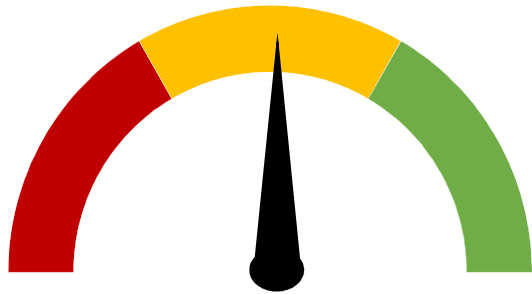
Comfort with air travel up



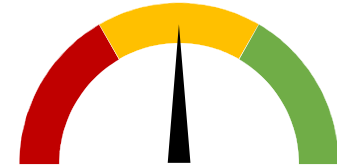
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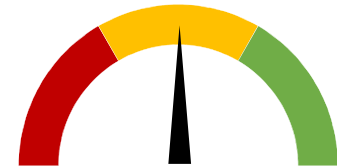
**U.S.**



***VIRUS CONTROL  
Readiness***



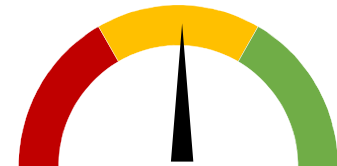
***DESTINATION  
Readiness***



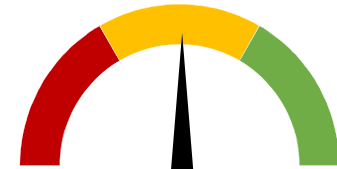
***ACCESS  
Readiness***



***PARTNER  
Readiness***



***CUSTOMER  
Readiness***



## VIRUS CONTROL Readiness

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

25,255	
55.27 % (at least 1 dose)	47.88 % (2 doses)

## DESTINATION Readiness

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

Reopening Step 3	▲
No restrictions	▲
Up to 50% capacity indoor	▲
Up to 50% capacity	▲
Up to 50% capacity indoor	▲
34 %	

*Host reluctance remains*

## ACCESS Readiness

Entry permission  
Entry restrictions  
Home quarantine requirements  
Available flight capacity

Border open: Target August 9
Quarantine required
CDC Travel Advisory
- 96 %

*Fully vaccinated visitors*

## PARTNER Readiness

Destination Canada  
Destination Ontario


## CUSTOMER Readiness

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

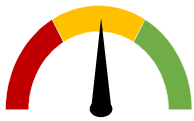
75 %	
56 %	
37 %	▲
32 %	▲
1 %	
- 77 %	

*Domestic travel returning*

▲▼ Change since prior index

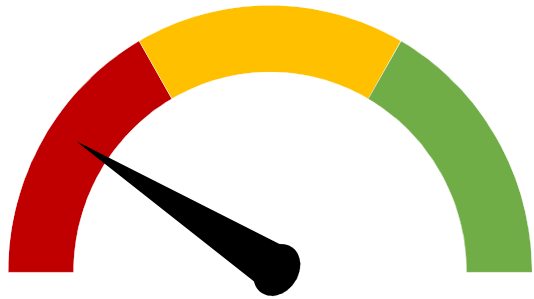


U.S.





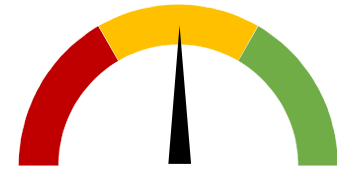
# INTER- NATIONAL



***VIRUS CONTROL  
Readiness***



***DESTINATION  
Readiness***



***ACCESS  
Readiness***



***PARTNER  
Readiness***



***CUSTOMER  
Readiness***



## VIRUS CONTROL Readiness

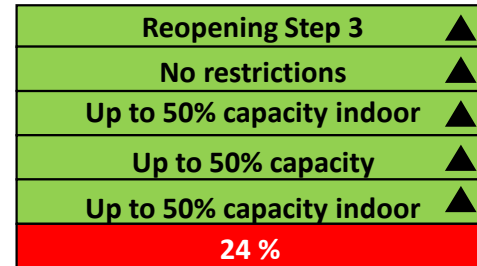
Daily new cases (last 7 day average)  
Vaccine rollout (% of population)



Track by  
country

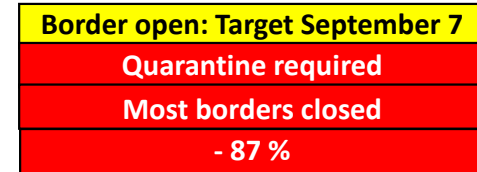
## DESTINATION Readiness

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



Fully vaccinated  
visitors

## PARTNER Readiness

Destination Canada  
Destination Ontario



## CUSTOMER Readiness

Search Interest – General Travel



Highly market  
dependent

▲▼ Change since prior index



# READINESS SUMMARY – July 15

***Short-haul***



***Long-haul***

