This document provides a summary of market signals and leading indicators assessing 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 NOVEMBER 2022**

(*DATA AS OF OCTOBER 31, 2022 *)

**HYPER-LOCAL** *(Toronto + GTA)*

Torontonians’ support of a strong tourism industry grows to 86% as the winter holiday season approaches

- 86% of surveyed Torontonians agree that a strong tourism industry is good for their community (+6)
- Search interest for travel within Toronto surpasses the 2019 level by 45% (-1)

**REGIONAL DRIVE** *(2-hour drive)*

Most residents in the GTA area remain comfortable travelling to communities near them

- Public Health Ontario recommends masking in indoor public settings as flu-related illnesses and hospitalizations increase throughout October
- 91% comfortable with travel to communities near them (+3)

**INTRA-PROVINCIAL** *(Rest of Ontario)*

The level of comfort in travel and major travel-related activities within the province jumped as it enters winter holiday season

- Ontario Covid-19 hospitalization rates stable at 3.2 per 100k, at the early November
- 89% are comfortable in travel within Ontario (+5)

**INTER-PROVINCIAL** *(Rest of Canada)*

80% of Canadian respondents are willing to travel anywhere domestically

- GTAA (Pearson) domestic air capacity at 83% of 2019 levels
- 80% are comfortable traveling within Canada (+1)

**UNITED STATES**

Search interest for travel to Toronto holds steady

- Level of welcome towards US travelers improved to 65% (+4)
- GTAA (Pearson) US air capacity at 73% of 2019 levels
- Search interest for travel to Toronto surpasses the 2019 level by 6% (+6)

**INTERNATIONAL**

As the anxiety toward Covid fades, more Torontonians are happy to see International visitors

- 50% of surveyed Torontonians are happy to see the destination marketed to international visitors (+7)
- Recovery from China still lag behind other international markets due to COVID-related border restrictions
- GTAA (Pearson) international air capacity at 76% of 2019 levels
- China at 5% of 2019, Japan at 45% of 2019
- International search interest for travel to Toronto surpasses 2019 level by 12% (+4)

**3 READINESS LEVELS**

**HOLD AND MONITOR:**
Closed, unavailable, low demand

**PLAN AND PREPARE:**
Clear shift, increased demand for reengagement

**ACTIVE SALES AND MARKETING:**
Meaningful demand, imminently open and fully open

(*DATA AS OF OCTOBER 31, 2022 *)