

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.

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

HYPER-LOCAL (Toronto + GTA)

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



- Virus control
- Destination readiness
- Access readiness
- Partner readiness
- Customer readiness

- 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)

INTER-PROVINCIAL (Rest of Canada)

80% of Canadian respondents are willing to travel anywhere domestically



- Virus control
- Destination readiness
- Access readiness
- Partner readiness
- Customer readiness

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

REGIONAL DRIVE (2-hour drive)

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



- Virus control
- Destination readiness
- Access readiness
- Partner readiness
- Customer readiness

- 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)

UNITED STATES

Search interest for travel to Toronto holds steady



- Virus control
- Destination readiness
- Access readiness
- Partner readiness
- Customer readiness

- Level of welcome toward 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% (+0)

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



- Virus control
- Destination readiness
- Access readiness
- Partner readiness
- Customer readiness

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

INTERNATIONAL

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



- Virus control
- Destination readiness
- Access readiness
- Partner readiness
- Customer readiness

- 50% of surveyed Torontonians are happy to see the destination marketed to International visitors (+7)
- Recovery from China still lags 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% (-1)