

NORTHSTAR

Advancing Understanding



UP Express Airport Employee Study

Presentation of Findings

September 24, 2013

INTRODUCTION

BACKGROUND

Over 35,000 people work at Toronto Pearson Airport, representing a significant potential market for UP (Union-Pearson) Express.

Using GTAA data, the Metrolinx Team calculated that 9,000 Airport workers live in the City of Toronto Exclusion per Committee Direction the Downtown catchment areas alone. At present, Metrolinx has only limited information about the demographics and commuting habits of this specific group. There is also a renewed need to understand interest in using UP Express to travel to work and in understanding price sensitivity.

RESEARCH OBJECTIVES

To address these information needs and inform an updated ridership strategy, this research will quantify the proportion of Airport Workers living in Toronto who are willing to consider using UP Express.

This will be achieved by:

- Understanding current mode of commuter travel for these workers, origin location, mode choice and travel experience, and the time of day they usually travel to/from work; and
- Understanding the appeal of UP Express to Airport Workers living in the key Catchment Areas – and the expected price for such a service.

Methodology

	Data Collection Method	The survey was conducted online. In order to recruit respondents, we leveraged a two-pronged approach: a) GTAA and key employers at Pearson notifying staff of the survey and providing a link to the study, and b) Over the course of 3 days, Northstar positioned 3 teams of 2 interviewers at key access/egress points along the Terminal Link (T1, T3 and Viscount Parking Station). These teams handed out 5,000 postcard invitations in addition to collecting email addresses in order to directly email respondents the invitation to participate in the study.
	Sample Size	376 completes • Employee Work Locations • 265 working at Terminal 1 • 71 working at Terminal 3 • 40 working at other locations • Employers Represented • 240 working for Air Canada • 26 working for West Jet • 110 working for other employers
	Qualifying Criteria	• Age: 18+ • Currently living in Toronto • Airport employee
	Fieldwork	June-September 2013

Reporting Perspective

Throughout this presentation, circles and squares have been used to distinguish results which are statistically or directionally significant.*

○ = Findings which are statistically higher (calculated at a 95% confidence level) between comparative sub-groups (e.g., those who recall seeing the advertising vs. those who did not).

□ = Findings which are statistically lower (calculated at a 95% confidence level) between sub-groups.

○ □ = Directional differences (calculated at an 80-90% confidence level).

➔ = Highlights findings of interest



*Note: To distinguish results which are statistically significant among sub-regions, superscript letters (e.g. ^{ABC}) have been used. The letters correspond to specific columns (e.g. A = Downtown Core, B= Downtown East, etc.). To understand which column each letter refers to, simply check the title of the column which is labelled with its associated letter.

Sub-groups

The following sub-groups will be used periodically throughout the report to demonstrate variations within the total sample.

Current Mode In/Out of Airport—Employee's main way of getting to/from the Airport for work

- Drive
- Transit—Net includes TTC, GO bus & MiWay (Mississauga/Brampton Transit)

Age

- 18-34
- 35-44
- *45+

Gender

- Male/Female

Region—Where the employee currently lives within Toronto

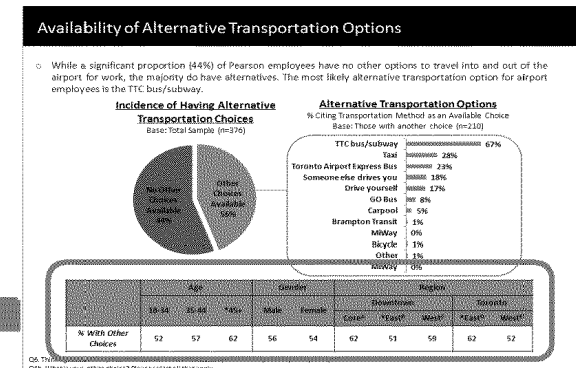
- Downtown (Core, *East or West)
- Toronto (*East or West)
- **Scarborough

Shift Work—Whether or not the employee does shift work at the Airport

- Yes/No

Employer

- Air Canada
- *West Jet
- Other



	Age			Gender		Region				
	18-34	35-44	*45+	Male	Female	Downtown			Toronto	
						Core ^A	*East ^B	West ^C	*East ^D	West ^E
% With Other Choices	52	57	62	56	54	62	51	59	62	52

* These subgroups have small bases sizes (<50) and should be interpreted as directional only. A single asterisk (*) will be used through the report to highlight these subgroups.

**NOTE: Due to extremely small sample size for Scarborough sub-group (13 respondents), results for this sub-group have been omitted from this report.

SUMMARY & IMPLICATIONS

Summary & Implications

- Currently, one-third of Pearson Employees living in Toronto take public transit when commuting to work – particularly those living Downtown (ranging from 43-51%).
 - Among drivers, when considering secondary options for transit to/from work, TTC is by far the most likely to be considered as an alternative.
 - In general, Employees prefer their chosen transportation method for convenience; how this is defined, however, differs by drivers vs. public transportation users. For drivers, convenience is about how quickly they can get between home and work, while for those who take public transit, it is about the convenience of location.
- There is a strong potential market for UP Express among Pearson Employees...*
 - Overall, about 40% of Employees claim they definitely/probably would take UP Express to commute to/from work;
 - Exclusion per Committee Direction
 - Among transit users, this proportion increases to 50%, and among those living in the Downtown Core, likelihood rises to 60%;
 - Among those open to using UP Express, the majority (nearly 60%) would take it regularly, suggesting that this method is more than likely going to be a replacement for their current transit method (specifically the TTC Airport Rocket). The segment who are 'on the fence' about taking UP Express (primarily drivers) anticipate using this service more as a secondary/back-up option, rather than as a replacement.

*Based on assumption of \$10 per one-way journey.

Summary & Implications (continued)

- One of the key drivers of likelihood to take UP Express is the perception that it will be the fastest way to get to/from work.
 - Given that transit riders report it takes them nearly an hour to get to work, it makes sense that the “25 minute ride” service proposition for UP Express is highly compelling, as it cuts their commute time in half.
- Overall, all three stations (Union, Weston and Bloor) have the potential to attract substantial traffic, based on anticipated access/egress points. This has significant infrastructure implications, as these stations will need to ensure that they can sufficiently accommodate potential demand and increased traffic.
 - Interestingly, each of the three stations have unique infrastructure needs, based on anticipated usage.
 - For Union, they will need to accommodate increased TTC and foot traffic (which speaks to the requirement for convenient access/egress points and clear signage);
 - For Bloor, they will need to accommodate increased TTC usage (which will require clear signage and a smooth service integration);
 - For Weston, there will be parking infrastructure implications, as one-third of those who plan on using Weston station plan to drive and park there. TTC traffic will also increase.

Summary & Implications (continued)

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Exclusion per Committee Direction

- V
c
v

- Driving this willingness to pay a premium is the perceived value of the service – that while it may cost more, it will significantly cut down on commuting time, especially for those who take public transit (a key driver of potential). As well, the convenience of UP is also factored into this willingness to pay a premium over the TTC: it is seen as reliable, would drop them off directly at work and is conveniently located.

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.80 per one-way fare) on
loyees are willing to pay
s/egress point.

pate paying more for the

a relationship between
a single, one-way ticket
pay \$5.20.

Summary & Implications (continued)

- The majority of Pearson Employees are shift workers, many of whom work non-traditional hours.
 - The implication is that, should UP Express choose to accommodate the varying shifts of Pearson Employees, extending the anticipated hours of service may be required, as nearly 15% of employees leave work between 1am and 5am - those times UP is not running.
- Many Pearson Employees will be a key point of communication for passengers looking for information about UP Express.
 - Over 50% of Pearson Employees are currently making ground transportation recommendations to passengers.
 - As such, it will be necessary to have education programs for Pearson Employees so that they can provide passengers with clear, concise and accurate information about UP Express.

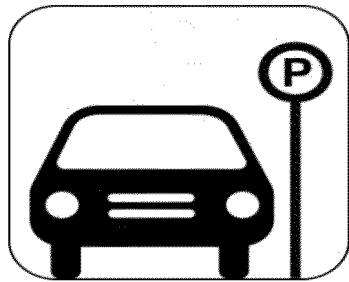
Current Travel To & From Airport

Main Method of Travel To/From Pearson

- Nearly all Employees (95%) use the same method of transportation to get to work as they use to get home after work.
- Almost two-thirds of Employees (63%) drive themselves to and from Pearson.
- Of the one-third who take the TTC, the Airport Rocket route is the most popular.

Main Method of Travel To/From Pearson

Base: Total Sample (n=376)



Someone drops you off/picks you up

Toronto Airport Express Bus

Drive yourself & park 0%

TTC 0%

0%

1%

Taxi 1%

GO Bus 1%

MiWay 3%

Brampton Transit 4%

Carpool 32%

Bicycle 63%

Route

Base: Total Sample

58

- Into: 4%
- Out of: 4%

192 (Airport Rocket)

- Into: 26%
- Out of: 26%

300A

- Into: 2%
- Out of: 2%

307

- Into: 2%
- Out of: 2%

95%
of the Employees use
the **same method** to
travel to and from
work at Pearson

Q5. What is the main way that you travel into Pearson Airport when going to work? And what is the main way that you travel out of Pearson Airport when returning home at the end of your work day?

Q5b. Please specify the specific route(s) that you take into and out of Pearson Airport. Check all that apply.

Main Method of Travel To/From Pearson –By Key Sub-Group

- Those who drive themselves and park are most likely to be 35-44 and live in either the east or west ends of Toronto, while those who take the TTC are more likely to live downtown.

	Age			Gender		Region					Employer		
	18-34	35-44	*45+	Male	Female	Downtown			Toronto		Air Canada	West Jet*	Other
						Core ^A	*East ^B	West ^C	*East ^D	West ^E			
Drive yourself & park	55	72	49	61	66	46	68	55	85 ^{ABC}	76 ^{ABC}	57	50	80
TTC	38	25	43	32	31	44 ^E	51 ^E	43 ^E	13	19	36	50	18
Someone else drops you off/picks you up	4	2	11	5	2	0	8	2	3	7	4	4	4
Toronto Airport Express Bus	4	3	4	3	5	12	3	2	3	2	5	0	0
Taxi	0	1	2	1	0	0	5	0	3	0	1	0	0
GO Bus	4	1	2	1	0	0	3	1	3	0	0	0	2
MiWay	0	1	0	0	1	3	0	0	0	0	0	0	1

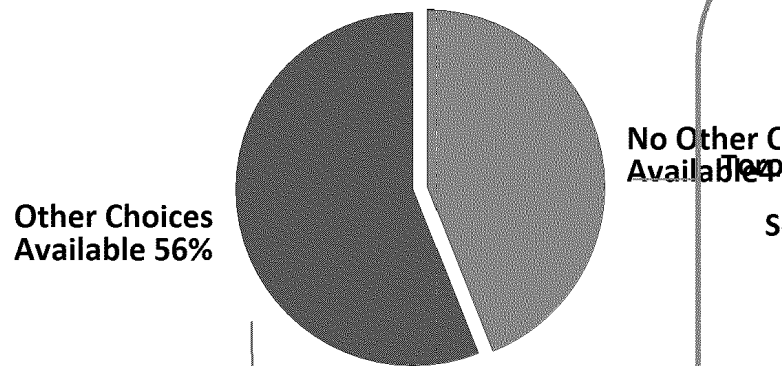
Q5. What is the main way that you travel into Pearson Airport when going to work? And what is the main way that you travel out of Pearson Airport when returning home at the end of your work day?

Availability of Alternative Transportation Options

- Nearly half (44%) of Pearson Employees claim to have no other options when commuting to/from the Airport for work, with most of the Employees without any other options using public transportation.
- Among those who do feel they have another option, the most likely alternative is the TTC.

Incidence of Having Alternative Transportation Choices

Base: Total Sample (n=376)

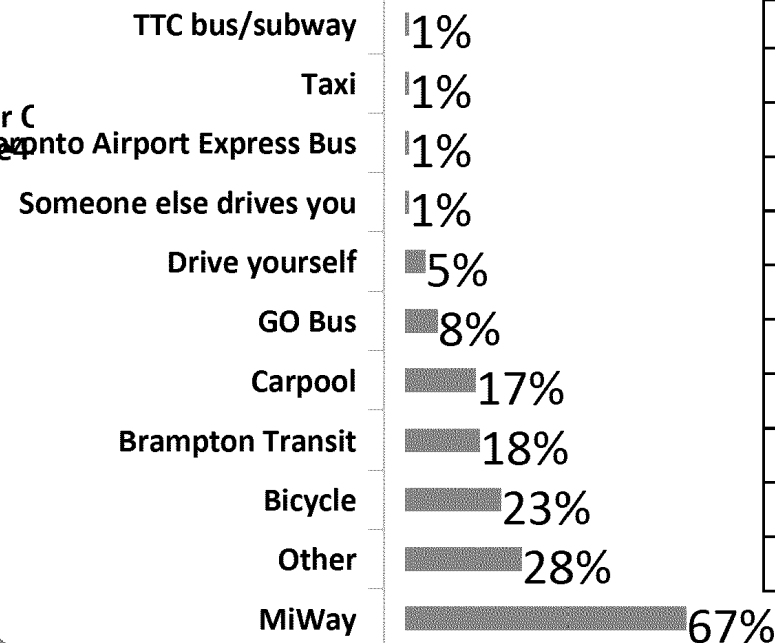


Current Travel Mode		Region				
		Downtown			Toronto	
Drivers	Transit	Core	East	West	East	West
38	60	38	49	41	39	48

Alternative Transportation Options

% Citing Transportation Method as an Available Choice

Base: Those with another choice (n=210)



Drive	Transit
87	2
25	37
22	29
14	27
3	59
7	10
5	4
1	0
2	0
0	2
1	0

Q6. Thinking about how you travel into and out of Pearson Airport for work, would you say that you...

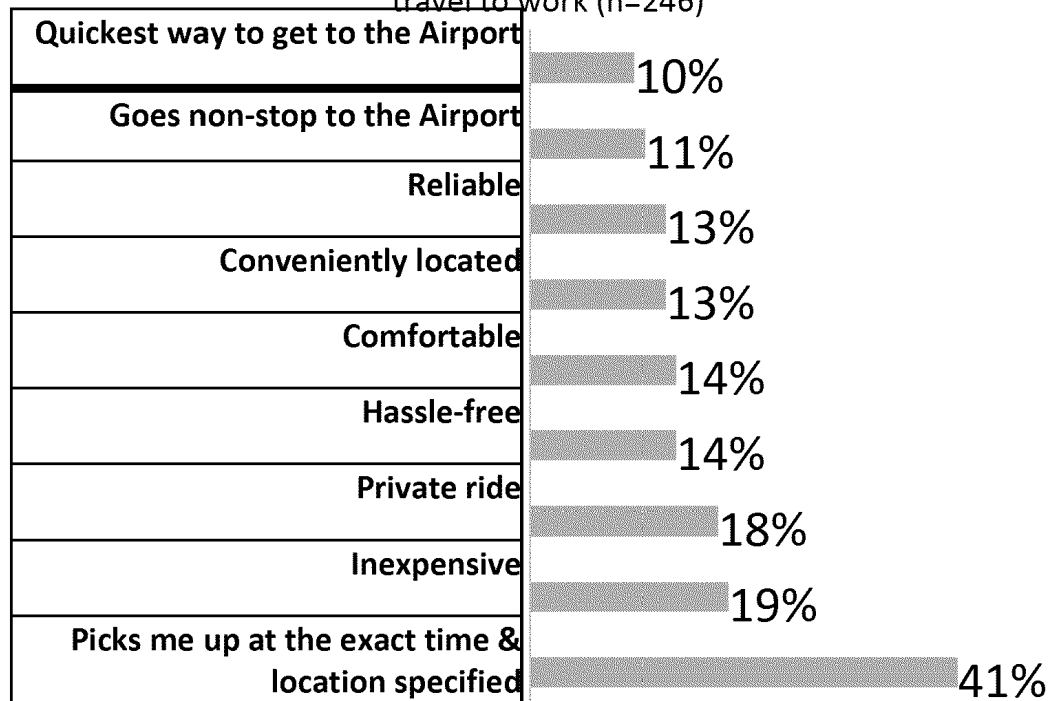
Q6b. What is your other choice? Please select all that apply.

Reasons for Choosing Mode of Transport

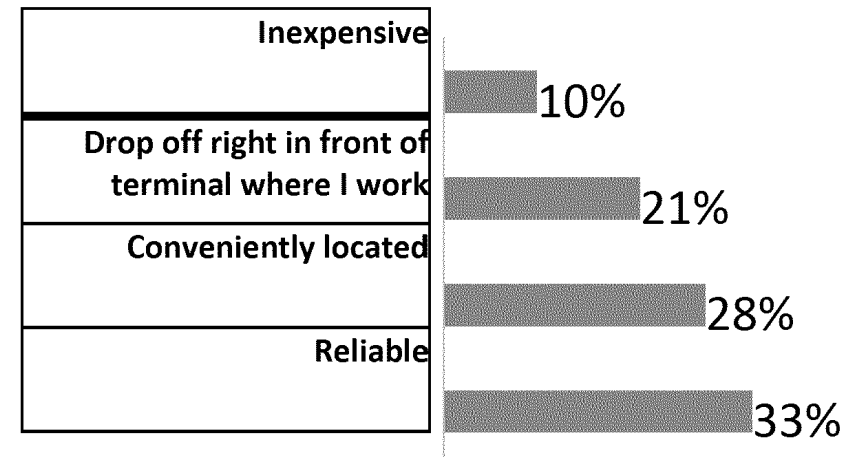
- Among those who drive to work, the top reason providing for choosing this method is that it is the quickest way to get to work.
- Among those who to use the TTC as their primary method of getting to work, the top reasons include price (it's inexpensive) and convenience (it drops them off at their terminal/it's conveniently located).

% Agreeing with Statement as Top 3 Reason vs. Alternatives—Top Mentions*

Base: Those who drive as primary method of travel to work (n=246)



Base: Those who use TTC as primary method of travel to work (n=116)



*Top mentions—cited by at least 10% of respondents

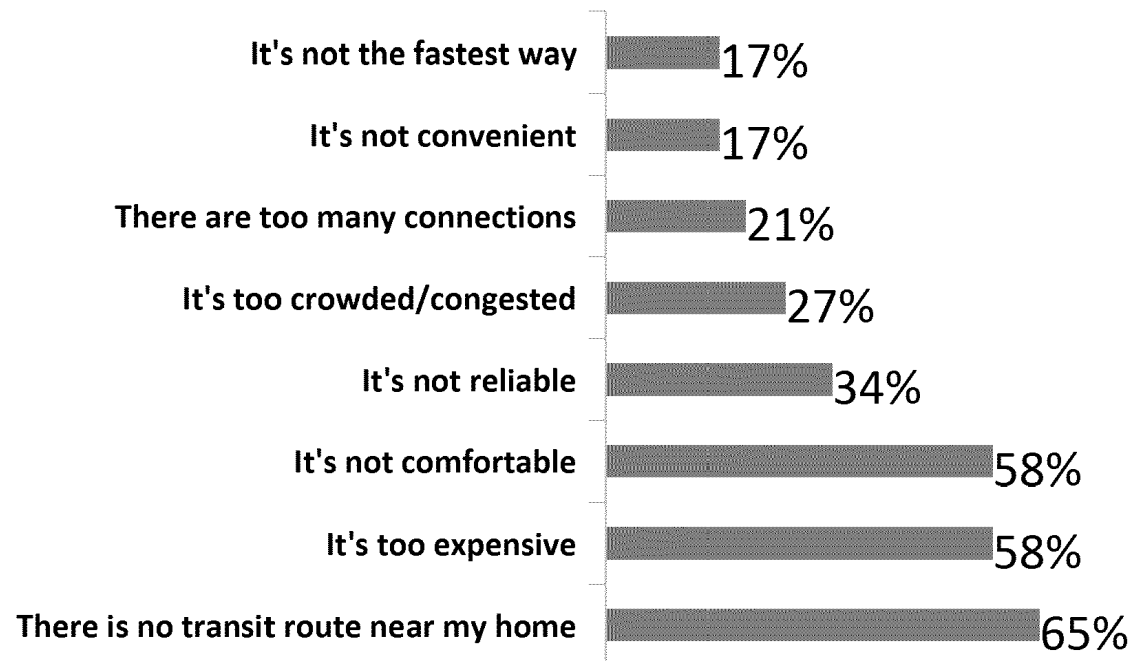
Q42. Please rank, from the list below, the top 3 reasons you choose (INSERT CURRENT METHOD) as your primary method of transportation to and/or from Pearson Airport for work over the alternative options you have. Please use the following ranking: 1 is the top reason you choose this method, 2 is the second reason you choose this transportation, and 3 is the third reason.

Reasons for Not Taking Public Transit

- The primary reason given for **not** taking public transit is that it is not the fastest way, followed by it being inconvenient and requiring too many connections.

Incidence of Agreeing with Reason for Not Taking Public Transit to Pearson—Top Mentions*

Base: Among those who do not take public transit to work (n=257)



*Top mentions—cited by at least 10% of respondents

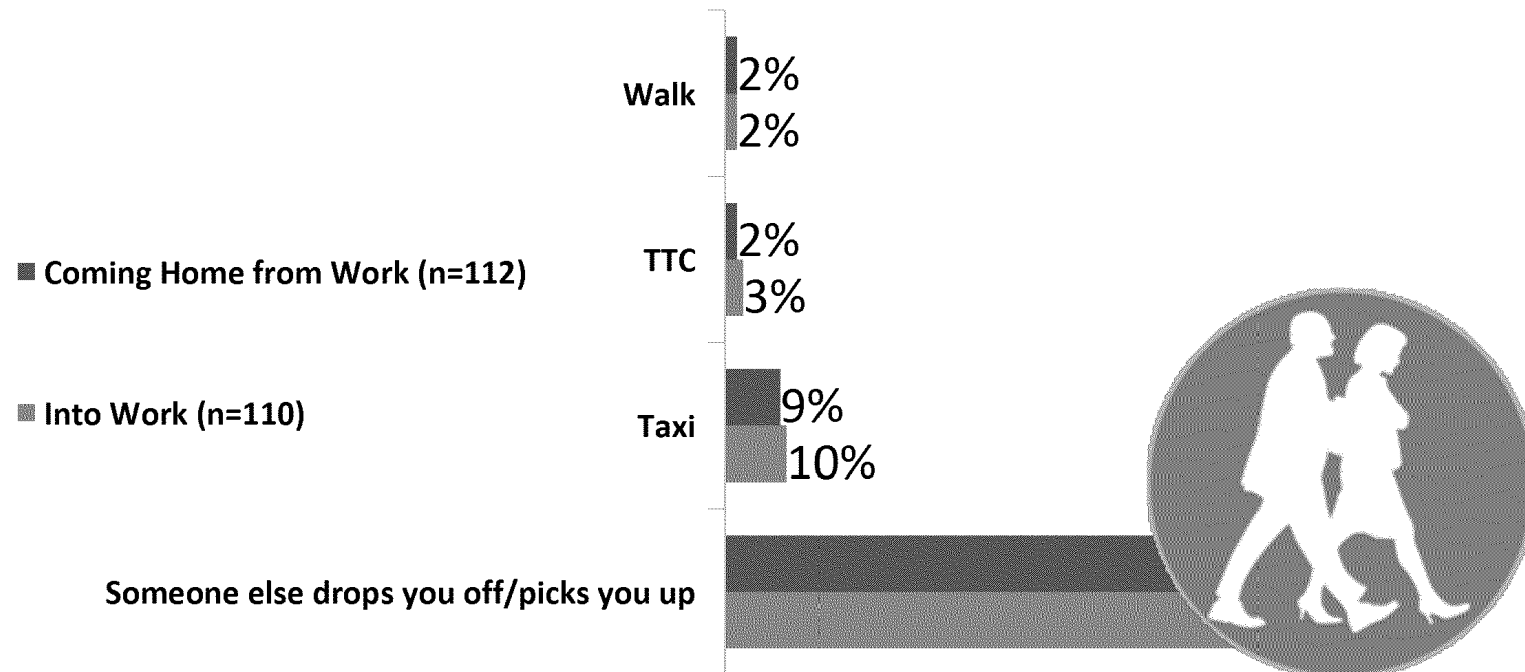
Q42b. From the following list, which of the following are reasons why you do not take public transit to commute to or from Pearson Airport? Please select all that apply.

Main Method of Travelling Between Home and Transit Station *(and vice versa)*

- Nearly all Pearson Employees who use public transit as their main way of getting to/from the Airport for work say that they walk from their home to the transit station (and vice versa).

Main Method of Travelling Between Home and Transit Station

Base: Among those asked (see legend for individual base sizes)

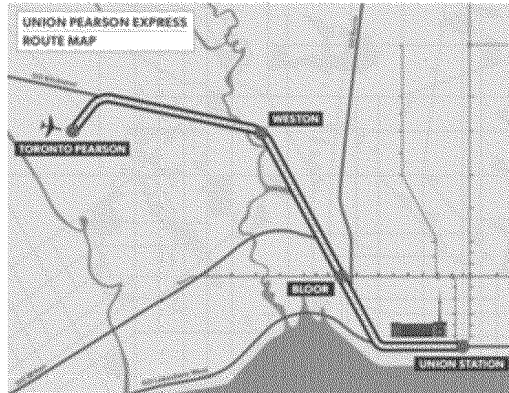


Q5c. How do you get from your home to [Insert from Q5a] when you travel into Pearson Airport going to work? And what is the main way you get from [insert from Q5b] to your home after work? Please select all that apply.

Market Assessment

Detailed Description of UP Express Service

Union Pearson Express (UP Express) will connect Canada's two business transportation hubs, Toronto Pearson International Airport and Union Station in downtown Toronto. It will be built just in time for the 2015 Pan Am and Parapan American Games.



In addition to Union Station, there will be two brief stops at Bloor GO (at the intersection of Bloor Street and Dundas Street West near the Dundas West TTC subway station) as well as at Weston, near the current GO station. The entire trip from Union Station to Pearson Airport will take approximately 25 minutes. The travel time will be less for the other two stations: approximately 16 minutes to travel between the Bloor GO station and Pearson, and approximately 10 minutes to travel between the Weston GO station and Pearson. It is anticipated that UP Express will operate every 15 minutes between approximately 5AM and 1AM, seven days a week.

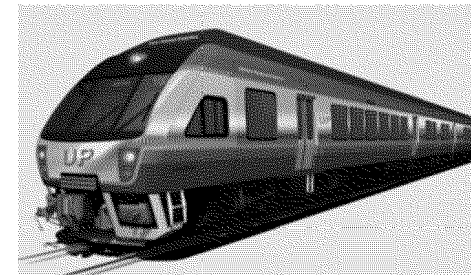
UP Express will transform the way we travel between Union Station and Toronto Pearson. It will enable a stress-free and seamless travel experience that is fast, reliable, convenient and comfortable. It will provide a high-speed, state-of-the-art service with the latest technology, comfortable interior, luggage racks, WiFi, restrooms and information about Toronto attractions.

The train will provide a high-speed, state-of-the-art service with the latest technology, comfortable interior including a guaranteed seat, luggage racks, WiFi, and restrooms.

At Pearson International Airport, UP Express will connect directly with Terminal 1, and will provide an easy and seamless connection to Terminal 3 through a direct transfer with the Airport's LINK people mover train.

The stations at Union and Pearson will have comfortable lounges that will have an open, modern feel. These lounges will have a variety of amenities, including:

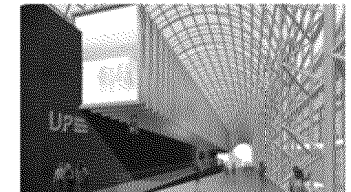
- Charging stations for electronics
- Attendants to provide assistance
- Innovative retail offerings
- Interactive information kiosks
- Food & beverage product samples from local Toronto and Ontario companies



Rendering of UP Express vehicle



Pearson Terminal 1 Station Rendering



Union Station Rendering

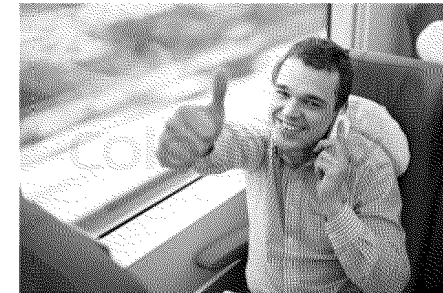
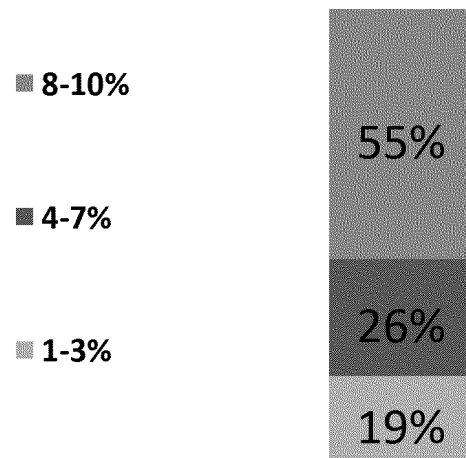
Appeal of the UP Express

- In general, Employees find the UP Express an appealing proposition, with Employees 18-34 and those residing downtown rating the service the most appealing.

Appeal of the UP Express

On a 1 to 10 Scale From Not at All Appealing to Very Appealing

Base: Total sample



	Current Mode In/Out of Airport		Age			Gender		Region					Employer		
	Drive	Transit	18-34	35-44	*45+	Male	Female	Downtown			Toronto		Air Canada	West Jet*	Other
								Core ^A	*East ^B	West ^C	*East ^D	West ^E			
% 8-10	52	57	61	53	45	56	53	72 ^{CDE}	65 ^E	57 ^E	44	43	54	73	52

Q7. Based on what you just read, how appealing is UP Express to you, personally, as a method of transportation to or from work at Pearson Airport?

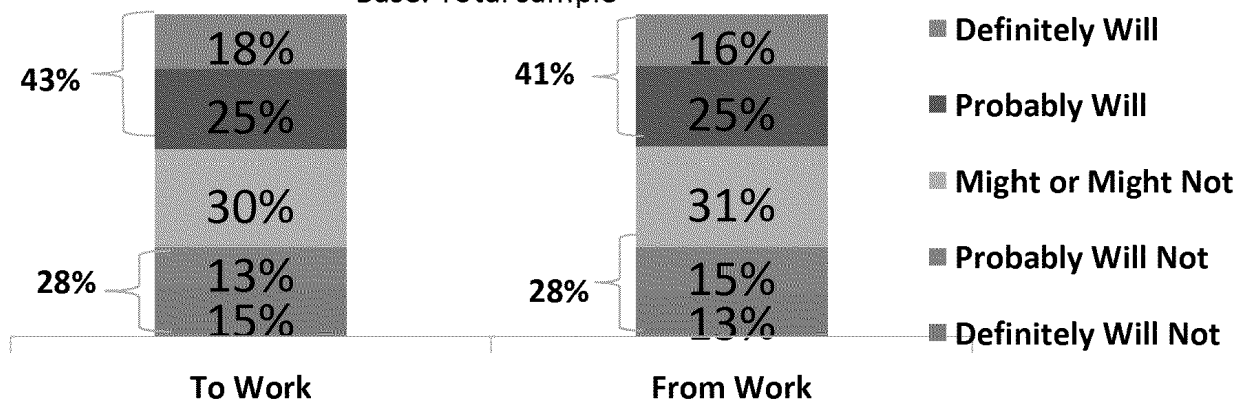
Likelihood to Use the UP Express

- Interest among Pearson Employees is moderately strong, with about four-in-ten saying they definitely or probably will use the UP Express, with interest highest among Employees who take public transit, live in the Downtown Core, and are shift workers. That being said, about one-third are rejecters of the service (primarily those who drive or live outside the Downtown).



Likelihood to Use the UP Express

Base: Total sample



	Current Travel Mode In/Out of Airport		Age			Gender		Region					Shift Work		Employer		
To Work	Drive	Transit	18-34	35-44	*45+	Male	Female	Downtown			Toronto		Yes	No	Air Canada	West Jet*	Other
								Core ^A	*East ^B	West ^C	*East ^D	West ^E					
Likely to Use**	38	48	44	42	38	46	39	61	43	43	36	34	47	35	44	50	36
Unlikely to Use**	33	21	21	31	36	25	30	13	14	17	36	47	23	36	24	19	38

**NOTE: "Likely" combines results for "Definitely Will" & "Probably Will", while "Unlikely" combines results for "Probably Will Not" & "Definitely Will Not".

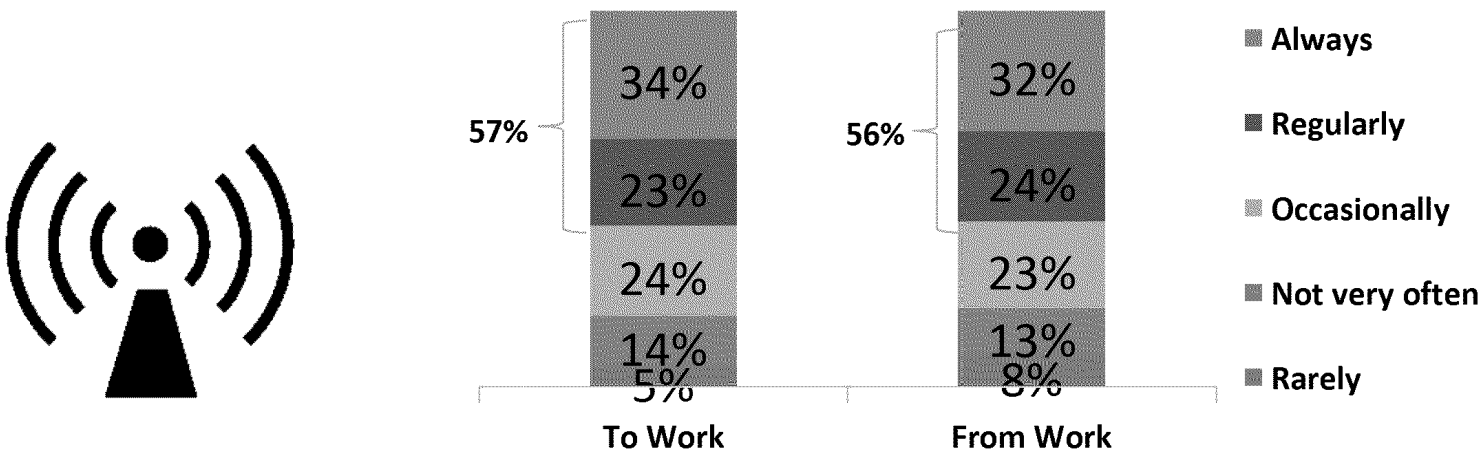
Q8. How likely would you be to use the UP Express to travel into or out of Pearson Airport for work?

Expected Frequency of Using the UP Express

- The majority of Pearson Employees who are open to using the UP Express say they plan to use it frequently (always/regularly). This is especially true among those Employees residing in the Downtown Core, those who take transit, and males.

Expected Frequency of Using UP Express

Base: Those open to taking UP Express (n=271)



	Current Travel Mode In/Out of Airport		Age			Gender		Region					Employer		
	Drive	Transit	18-34	35-44	*45+	Male	Female	Downtown			Toronto		Air Canada	West Jet*	Other
								Core ^A	*East ^B	West ^C	*East ^D	West ^E			
To work	48	70	59	56	57	62	50	72 ^{DE}	59	56	48	53	60	71	43
From work	47	71	59	54	55	61	49	73 ^{CDE}	58	55	46	51	61	68	41

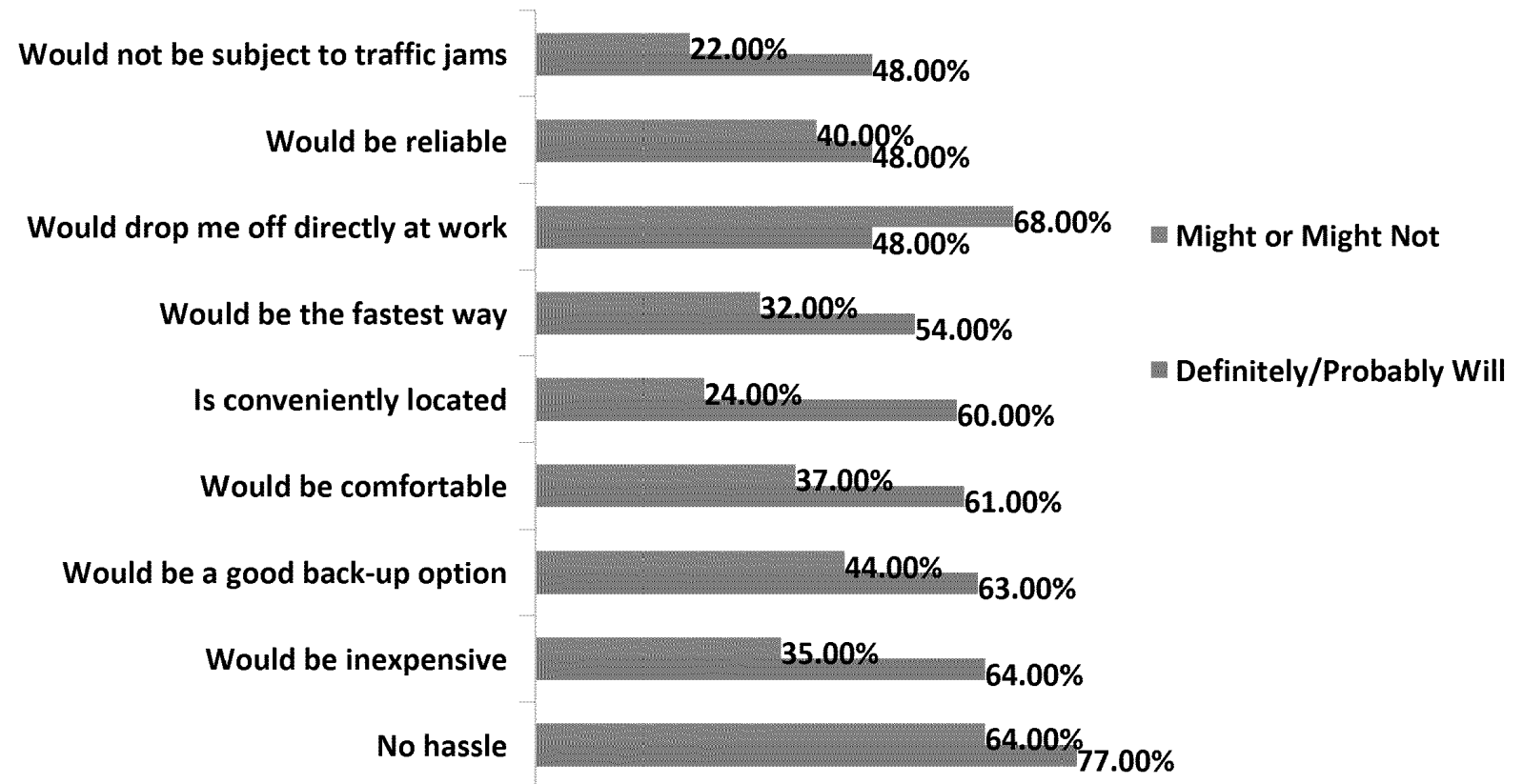
Q9. How often do you think you would use the UP Express to commute to/from Pearson Airport for work?

Top Reasons for Taking UP Express to/from Work

- Among those most likely to use UP Express, the top reason is that they can avoid traffic jams. Other top reasons include reliability and convenience.
- Among those who may or may not use the service, the top reason is as a back-up option to their current transportation method, which aligns with their anticipated frequency of usage (see previous slide).

Reasons for Taking UP Express to/from Work—Top Mentions*

Base: Among those open to taking UP Express (n=271)



*Mentioned by at least 48% of respondents who said they "Definitely Will" use the UP Express. See appendix for full list of reasons among total sample.

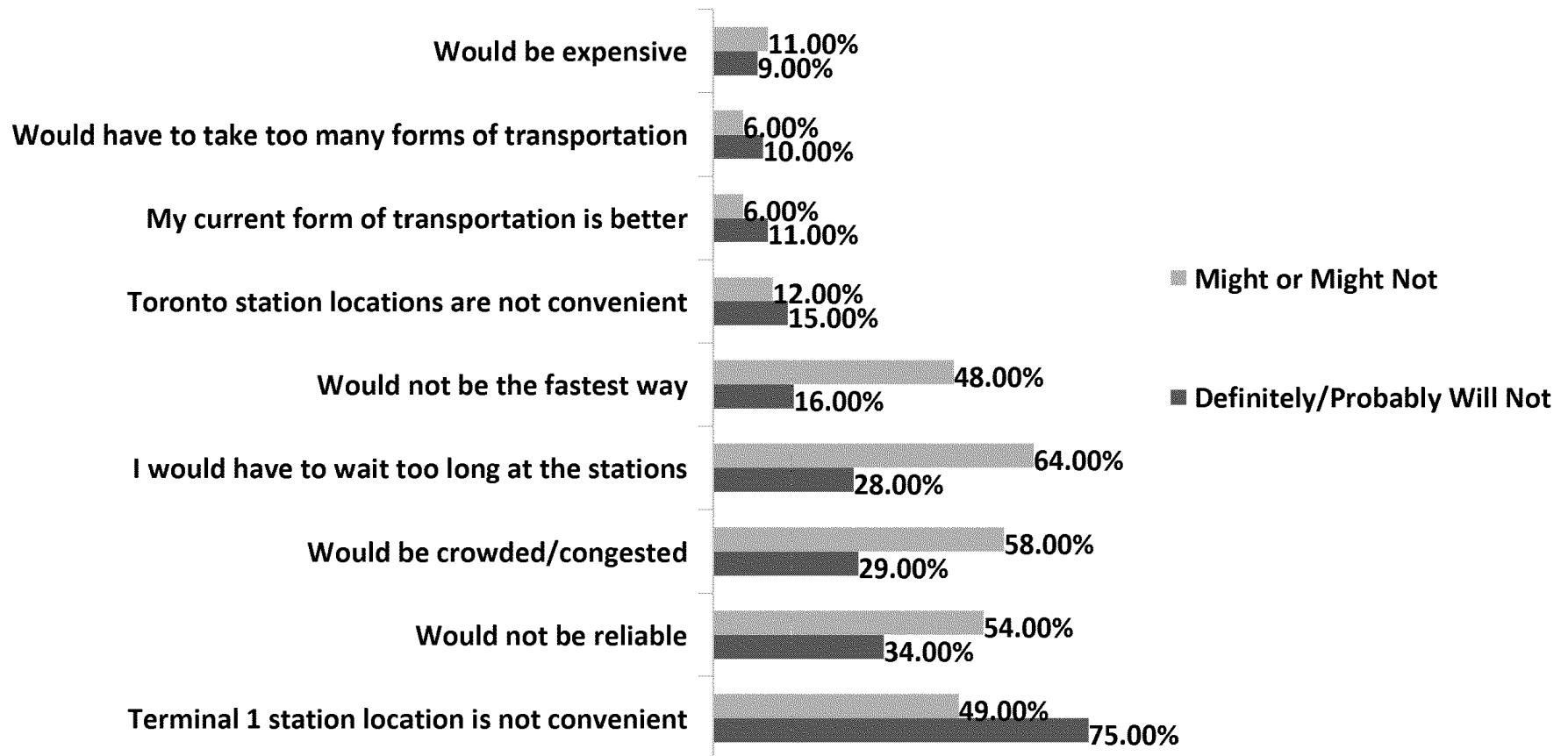
Q10. Which of the following are some of the reasons that you would consider taking the UP Express to travel into or out of Pearson Airport for work? Please select all that apply.

Top Reasons **Against** Taking UP Express to/from Work

- Among those who would not use UP Express, the top (and only) barrier is the perceived expense.
- For those who may or may not use the service, their reasons are primarily based around perceiving UP as less convenient.

Reasons Against Taking UP Express to/from Work—Top Mentions*

Base: Among those who may not be open to taking UP Express to/from work (n=217)



*Mentioned by at least 9% of respondents who said they “Definitely Will Not” use the UP Express. See appendix for full list of reasons among total sample.

Q11. Which of the following are some of the reasons that you would **not** consider taking the UP Express to travel into or out of Pearson Airport for work? Please select all that apply.

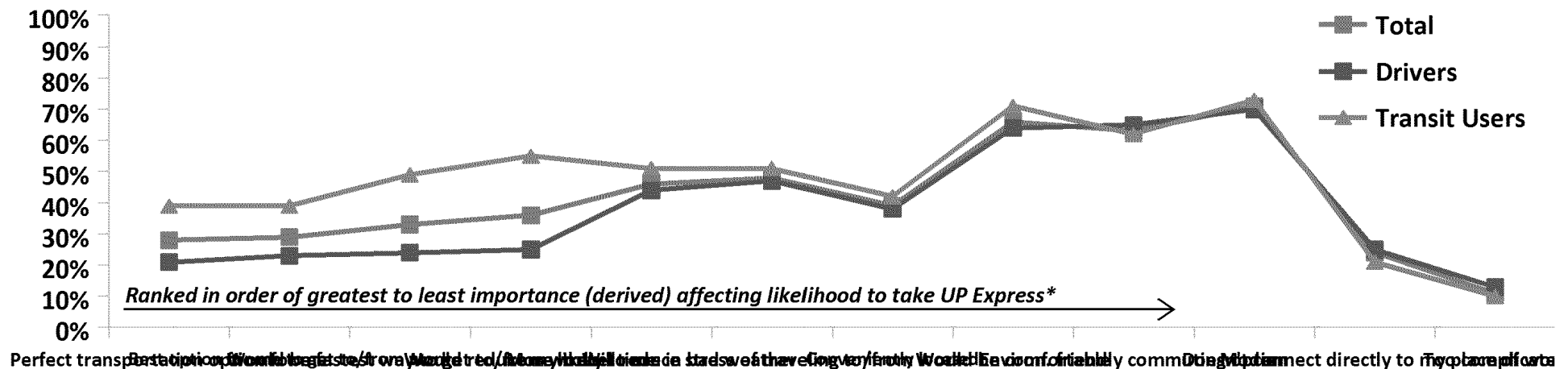
Perceptions of the UP Express

- Pearson Employees appreciate that the UP Express will be modern, comfortable, environmentally friendly and will reduce their commuting stress. That said, these are not the key drivers for using UP Express.
- Current transit users are the most likely to see this as being a good option for them – and in particular, in reducing commute time. The lower ratings on these metrics among drivers aligns with previous results, and further highlights the barriers to enticing drivers to use UP Express as an alternative to driving.

Perceptions of the UP Express

% Rating 8-10 on a 10-Point Scale From Does Not Describe At All to Describes Perfectly

Base: Total sample/Drivers/Transit Users



*See appendix for definition of derived importance.

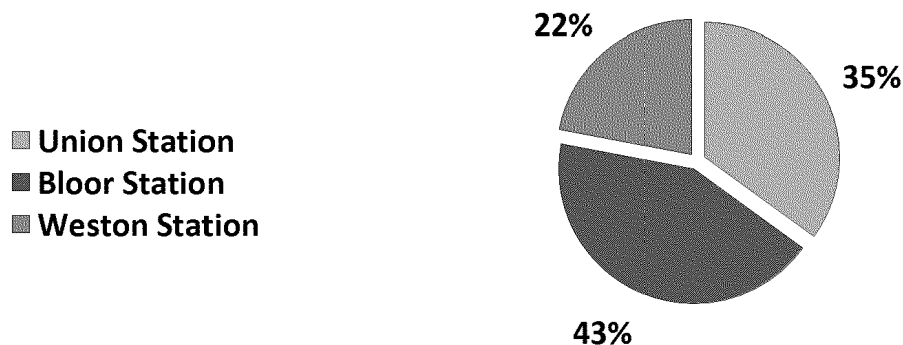
Q12. Based on what you have just read today about the UP Express, how well do the following statements describe the UP Express? Please use a 10-point scale, where 1 means 'Does Not Describe At All' and 10 means 'Describes Perfectly'.

Likely Access & Egress Points

- The majority of respondents anticipate using Bloor Station as both access and egress points for the UP Express, while just over one third anticipate using Union Station.
- For nearly all occasions, the access/egress point is anticipated to be the same when taking the UP Express.
- Those who drive to the Airport are more likely to get on/off at Weston Station, while those using transit are most likely to use Bloor Station.

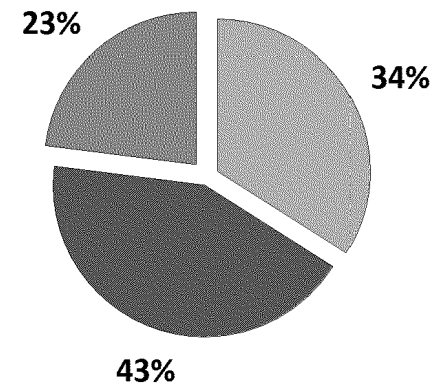
Access Point for UP Express

Base: Among those open to using UP



Egress Point for UP Express

Base: JP



**93% of the time
the
access/egress
point is the
same**

Station to get on/off at	Current Travel Mode In/Out of Airport		Age			Gender		Region					Employer		
	Drive	Transit	18-34	35-44	*45+	Male	Female	Downtown			Toronto		Air Canada	West Jet*	Other
								Core ^A	*East ^B	West ^C	*East ^D	West ^E			
Union	33	38	36	34	43	39	29	89 ^{CD}	74 ^{CD}	8	46 ^C	6	40	48	21
Bloor	38	54	48	42	33	39	52	11	24	78 ^{ABDE}	46	32	47	48	28
Weston	33	9	20	26	27	23	23	0	3	14	19	65 ^C	13	5	52

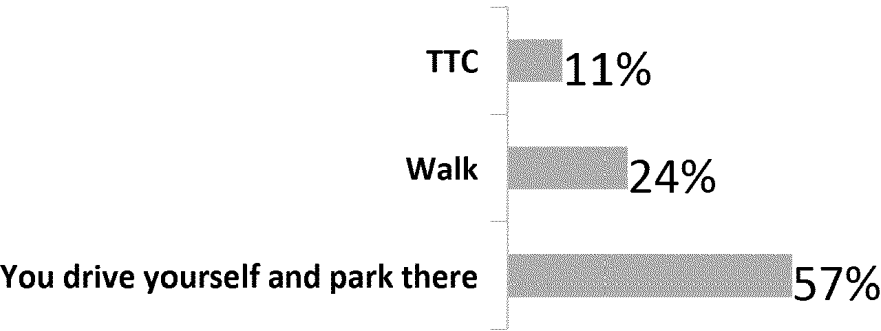
Q13. Thinking about when you would take the UP Express into Pearson Airport for work, from which station would you take the UP Express? And when returning home from Pearson via the UP Express, which station would you get off at?

Main Method of Travel to/from Preferred UP Express Station

- The TTC is anticipated to be the most likely mode to get Employees to their preferred UP Express stations (57%) – this is particularly true for those anticipating using Bloor Station, while those using Weston are the most likely to want to drive and park there (having implications on parking infrastructure in the area).

Main Method of Travel to Preferred UP Express Station—Top Mentions*

Base: Among those open to using UP



Bloor	Union	Weston
66	55	40
20	32	18
7	3	33

Note: Results regarding Main Method of Travel FROM Preferred UP Express Station have been omitted as 97% of the time they reflect the same results as Main Method of Travel TO Preferred UP Express Station.

*Top mentions—mentioned by at least 10% of respondents

Q14. How do you anticipate you would get to (INSERT RESPONSE FROM Q13a) when taking the UP Express from this point? And how do you anticipate you would get from (INSERT RESPONSE FROM Q13B) to your final destination when returning home from Pearson Airport via the UP Express?

Exclusion per Committee Direction

Pricing

Exclusion per Committee Direction

Exclusion per Committee Direction

Exclusion per Committee Direction

Current Travel Behaviour

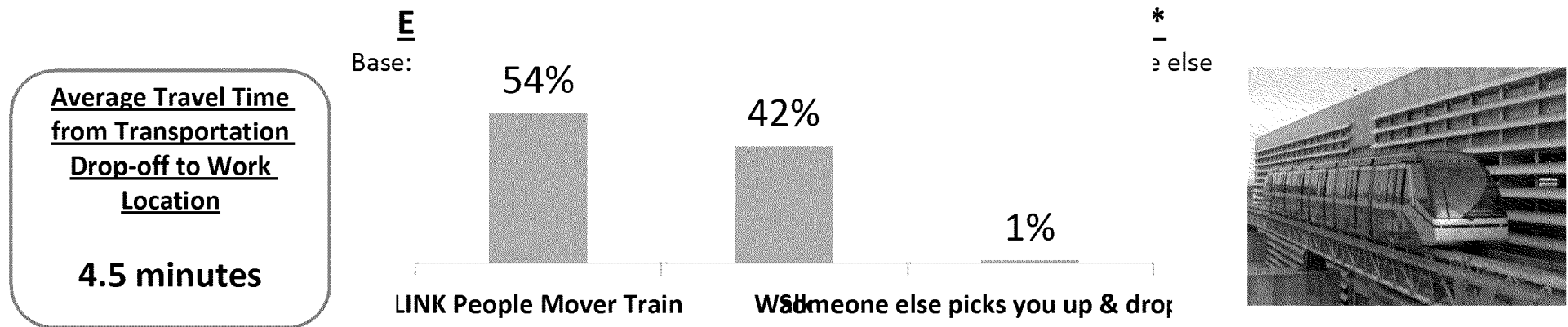
Exclusion per Committee Direction

Exclusion per Committee Direction

Travelling Between Transportation Drop-off and Work Location

- On average, it takes Employees about 5 minutes to get from their drop-off location to their place of work, with about 50% taking the LINK and slightly fewer (about 40%) walking.
- This split is driven primarily by transportation method, with those who drive taking the LINK and transit users walking.

Method of Travelling Between Transportation Drop-off Location and



	Terminal 1 (77%)		Terminal 3 (23%)		Preferred Transportation Method	
	Groundside	Airside	Groundside	Airside	Drivers	Transit Users
LINK People Mover Train	55	53	52	67	81	0
Walk	39	42	52	47	16	93
Someone picks you up & drops you off	1	1	0	0	2	0

*Top mentions—cited by at least 1% of respondents

Q26. How do you get from (INSERT DTS) to where you work at the Airport?

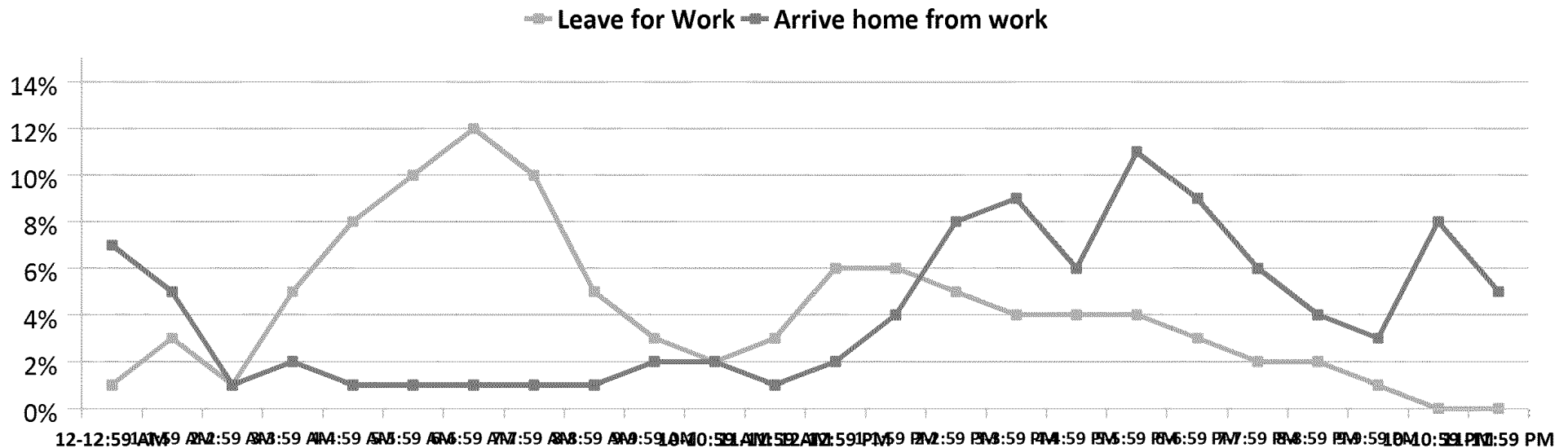
Q27. How many minutes does it take to get from (INSERT DTS) to where you work at the Airport?

Time of Day Employees Typically Travel To/From Work

- The majority of Employees heading to work leave their homes between 5-8 AM, with evening workers leaving in the early afternoon (between 12-2 PM).
- The majority of Employees heading home from work leave around the time school ends for the day (2-4 PM) or just around dinner time (between 5 and 7 PM). There is another group of late night workers who leave work around midnight (between 12-2 AM).

Time Of Day Employees Typically Travel Leave For/Arrive Home From Work

Base: Total sample (n=376)



Q28. What time do you currently leave for work most often?

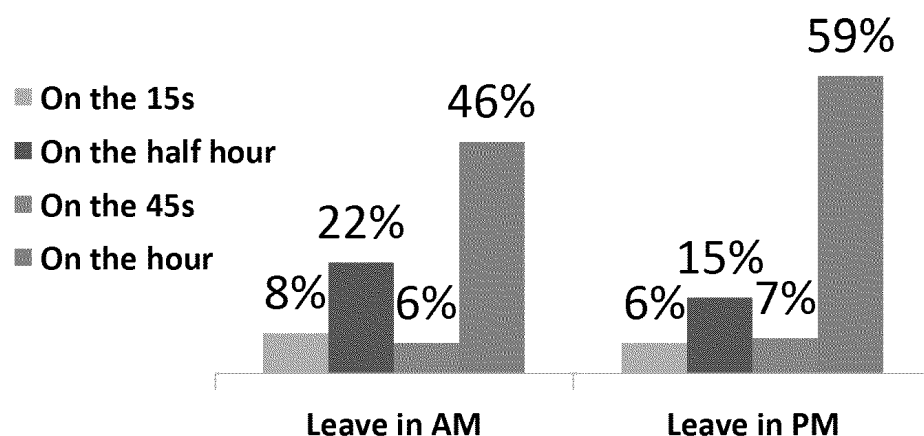
Q30. And approximately what time do you currently leave work to return home most often...?

Time of Day Employees Typically Travel To/From Work (continued)

- Regardless of whether Employees head to work in the AM or PM, most leave work on the hour. The same is true of Employees heading home from work.
- It generally takes drivers just over 30 minutes to travel to/from work, while it takes transit users almost double that time.

Time Employees Typically Leave For Work By Quarter Hour

Base: Total Sample (n=376)



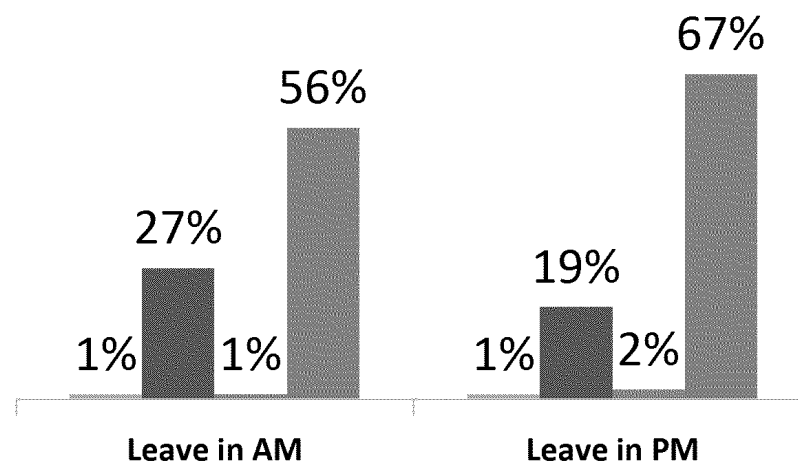
Average Travel Time From Home to Work

Overall: 40.9 minutes

Drivers: 32 minutes

Transit Users: 58 minutes

Time Employees Typically Head



Average Travel Time From Work to Home

Overall: 42.6 minutes

Drivers: 35 minutes

Transit Users: 58 minutes

Q28. What time do you currently leave for work most often?

Q29. How long would you say it typically takes you from the time you leave for work to the time you arrive?

Q30. And approximately what time do you currently leave work to return home most often...?

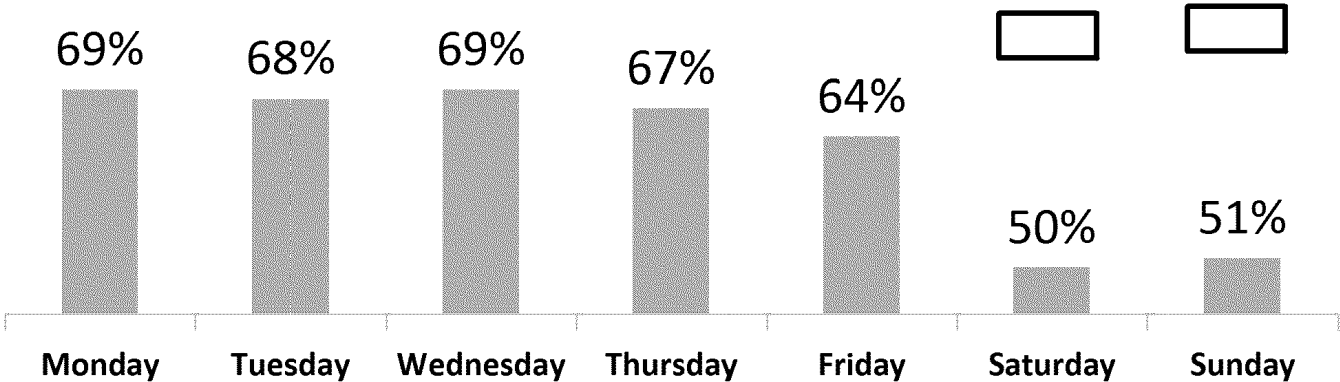
Q31. How long would you say it typically takes you from the time you leave work to the time you arrive home?

Employee Scheduling

- Employees' schedules are constantly changing – not only on a weekly basis, but also on a daily basis.
- While significantly fewer Employees work on weekends, at least half of all Airport Employees do report working Saturdays and Sundays.

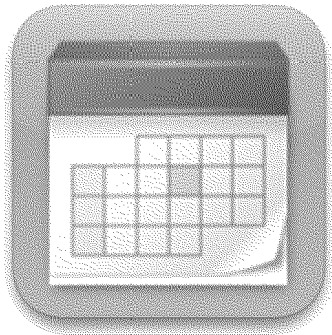
Days of the Week Worked By Employees

Base: Total sample



70% of Pearson Employees say their schedule changes from week to week

60% of Pearson Employees say they work different time shifts depending on the day of the week



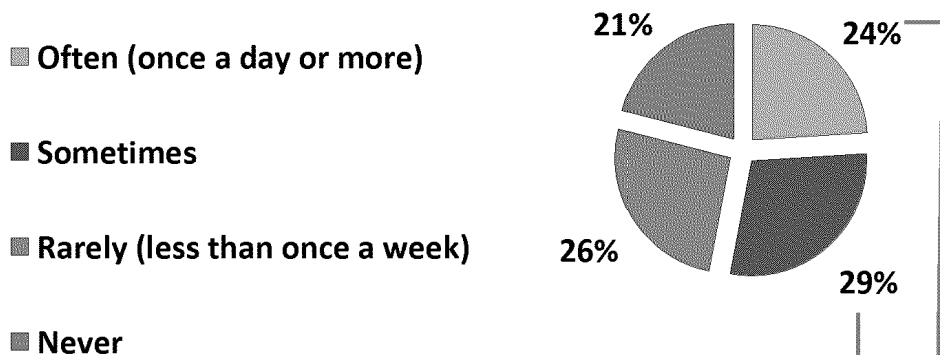
- Q32. In the last seven days, what days of the week did you work at Pearson Airport? Please select all that apply.
- Q33. Do you always work these same days of the week, or do you work different days during different weeks of the year?
- Q34. Do you currently work the same shift each day that you work, or do you work different time shifts on different days of the week?

Passenger Recommendations

- About half of all Employees agree that they recommend ground transportation to passengers. That said, Air Canada employees report recommending ground transportation significantly less frequently than employees of West Jet and other employers.
- Among those who *ever* make recommendations to passengers, the most likely form of ground transportation recommended is the TTC, followed by the Toronto Airport Express bus.

Frequency of Recommending Ground Transportation to Passengers

Base: Total sample

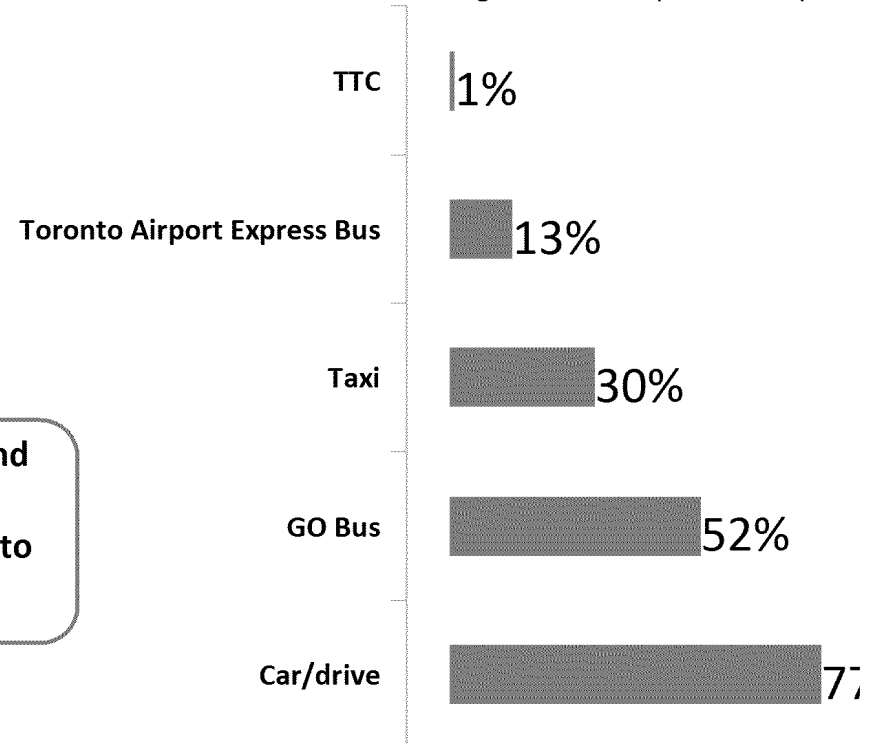


	Air Canada	West Jet*	Other
% Often	16	50	35

53% recommend ground transportation to passengers

Ground Transportation Currently Recommended to Passengers—Top Mentions*

Base: Those who ever recommend ground transportation (n=296)



*Top mentions—cited by at least 1% of respondents

Q41a. In your day to day role, do you recommend ground transportation options to passengers on how to get from Pearson Airport to their final destination in downtown Toronto?

Q41b. Which modes of ground transportation do you currently recommend for passengers travelling from Pearson Airport to downtown Toronto? Please select all that apply.

APPENDIX 1: Demographics

Respondent Profile

Gender	Male	66%
	Female	34%
Age	18 to 24	6%
	25-34	29%
	25-44	26%
	45-54	26%
	55-64	11%
	65+	1%
	Average	40.7
Catchment Area	Downtown Core	16%
	Downtown East	10%
	Downtown West	28%
	Toronto East	10%
	Toronto West	32%
	Scarborough	4%

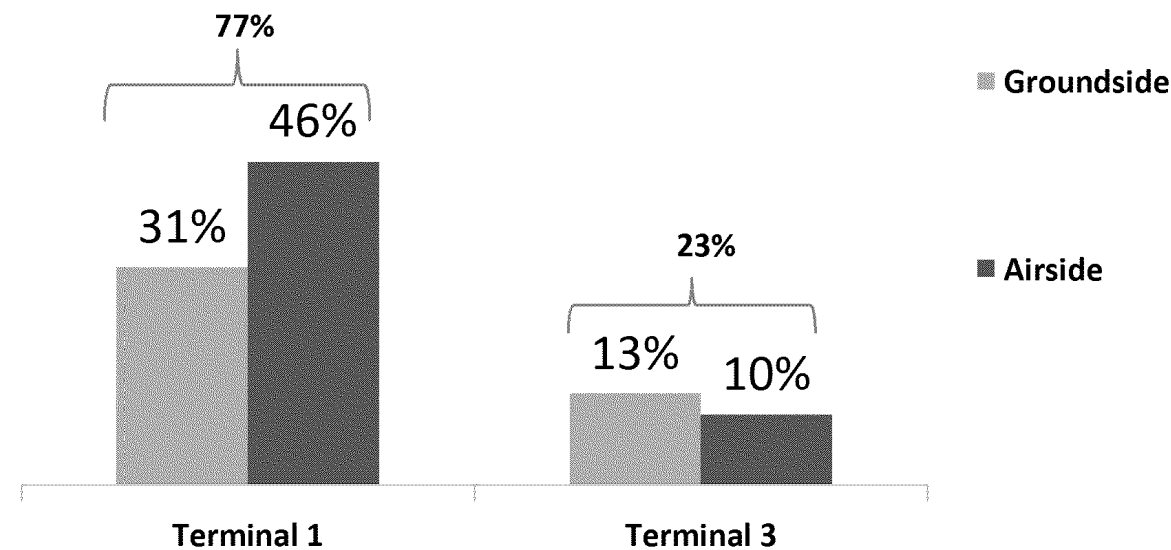
Respondent Profile (continued)

Current Job	Airline staff/crews	59%
	Management	11%
	Ground crew	7%
	Baggage handling	5%
	Security	4%
	Canada Border Service Agency (CBSA)	3%
	Air craft maintenance	3%
	Hospitality/restaurants	1%
	Greater Toronto Airports Authority (GTAA)	1%
Employer at Pearson	Air Canada	64%
	West Jet	7%
	Greater Toronto Airports Authority (GTAA)	5%
	Canada Border Services Agency (CBSA)	4%
	Garda of Canada	2%
	Swissport	2%
	Servisair Inc.	1%
	Cathay Pacific Airways	1%
Shift Work	Yes	60%
	No	40%

Employment Location at Pearson

Employment Location at Pearson

Base: Total sample



*Based on results for Likelihood to Take UP Express INTO Pearson (results for OUT OF Pearson have been omitted).

Q25. Where, at the Airport, do you work?

APPENDIX 2: Statistical Analysis

Definition of Derived Importance

- Derived importance measures the degree of influence various factors have on Employees' likelihood to use the UP Express in the future.
- The principle behind 'derived' importance is that what people say is important to them may, and often does, differ from what drives their behaviour. The reasons being...
 - Consumers often do not know what is driving their behaviour; and / or
 - Consumers often feel a need to offer what they believe are the desired responses.
- Derived importance determines the importance of an attribute (e.g. is modern, is comfortable, would be the fastest way for me to get to the Airport, etc.) by looking at the relationship between that attribute & overall likelihood to take the UP Express.
- The output is a series of correlation coefficients indicating the direction of the relationship (positive or negative) between likelihood to take the UP Express and each independent variable, and the relative strength of the relationship.
- Correlations can range from +1 to -1. A correlation of 0.40 or higher indicates an identifiable relationship. The higher the correlation, the more that variable influences overall impression.

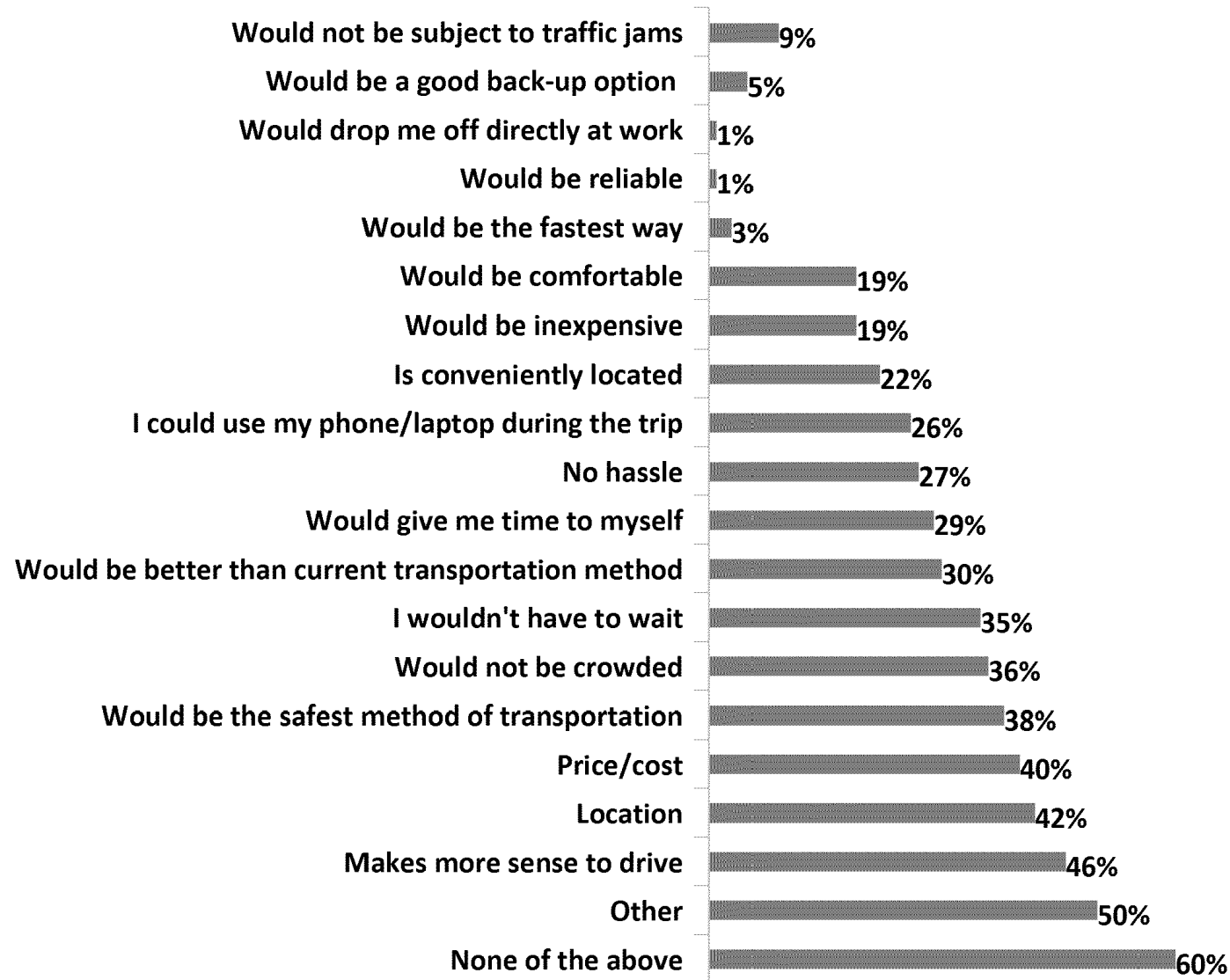
Derived Importance Correlations

Is the perfect transportation option for me	0.71
Is the best option for me to get to/from the Airport for work	0.71
Would be the fastest way for me to get to/from the Airport for work	0.68
Would reduce my travel time	0.65
Is a transportation method I'm more likely to use when the weather is bad	0.57
Will reduce the stress of traveling to or from the Airport for work	0.55
Conveniently located	0.53
Would be comfortable	0.21
An environmentally friendly commuting option	0.19
Is modern	0.17
Doesn't connect directly to my place of work	-0.13
Is too complicated	-0.17

Reasons for Taking UP Express to/from Work

Reasons for Taking UP Express to/from Work

Base: Total sample

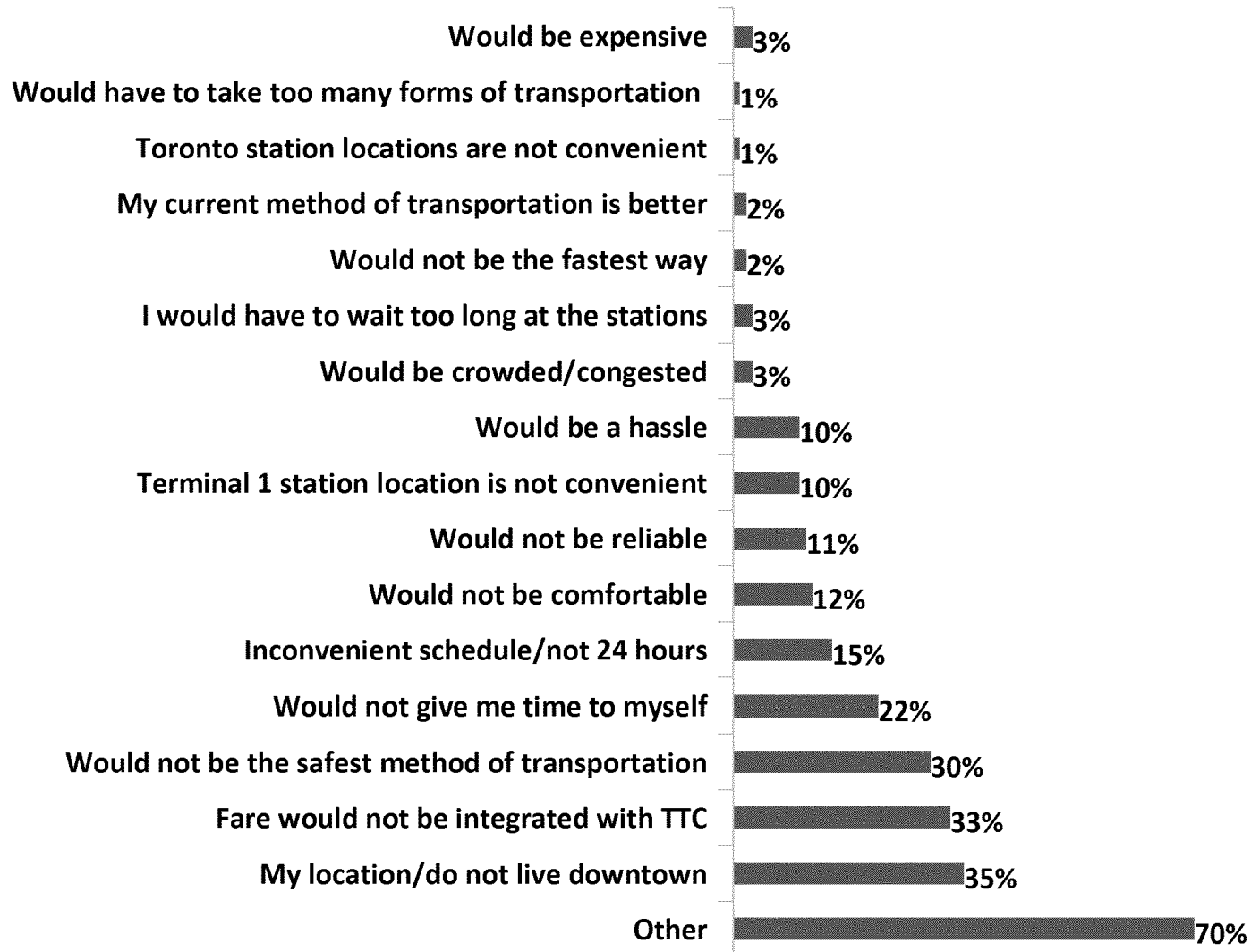


Q10. Which of the following are some of the reasons that you would consider taking the UP Express to travel into or out of Pearson Airport for work? Please select all that apply.

Reasons Against Taking UP Express to/from Work

Reasons Against Taking UP Express to/from Work

Base: Total sample



Q11. Which of the following are some of the reasons that you would **not** consider taking the UP Express to travel into or out of Pearson Airport for work? Please select all that apply.

Exclusion per Committee Direction

AP

Models

Exclusion per Committee Direction

Pricing

Exclusion per Committee Direction

Exclusion per Committee Direction

Exclusion per Committee Direction

Exclusion per Committee Direction