

NORTHSTAR

Advancing Understanding



UP Express Meeters & Greeters Study

Presentation of Findings

October, 2013

INTRODUCTION

BACKGROUND

As the UP Express gets nearer to completion, Metrolinx is looking to better understand the potential ridership opportunities for UP Express. Specifically, for this phase, Metrolinx needs to understand how likely ‘Meeters & Greeters’ (those who drop and/or pick people up from the Airport) are to take the UP Express as opposed to using their current transportation methods (such as driving, taking transit, cabs, etc).

RESEARCH OBJECTIVES

To address these information needs and inform an updated ridership strategy, this research piece will quantify the proportion of Meeters & Greeters who are willing to consider using UP Express.

Additio **Exclusion per Committee Direction**

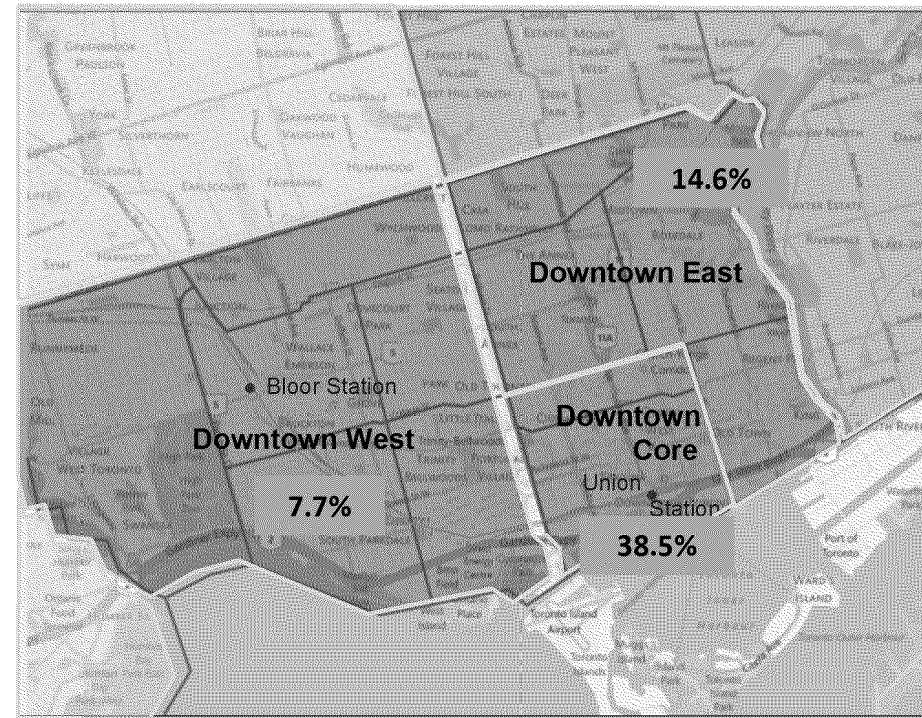
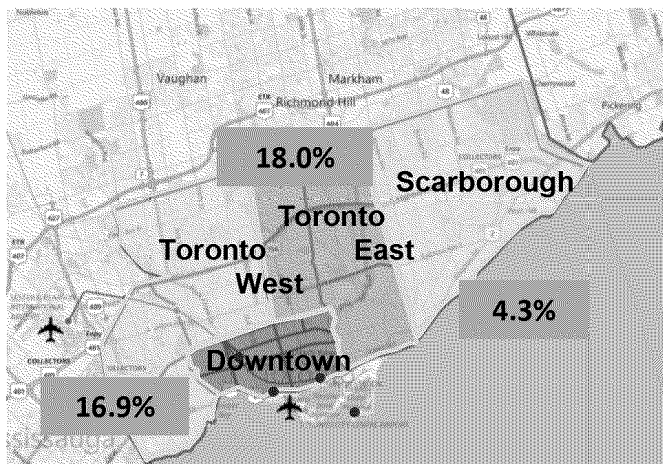
- Understanding current travel behaviour (what proportion of those living in Downtown drop off and/or pick up someone from the Airport; what transportation method is used; where they pick up/drop off the passenger, etc);
- Measuring anticipated likelihood of switching to UP Express;
- Identifying the drivers and barriers to taking UP Express; and
- Measuring the ticket price sensitivity (*note: analysis to be conducted by Metrolinx*)

Methodology

	Data Collection Method	An online survey distributed by email through on-line panels
	Sample Size	1,000 completes
	Qualifying Criteria	• Age: 18+ • Currently living in Toronto • Travelled to Pearson Airport to pick up and/or drop off a passenger
	Fieldwork	August & September 2013

A Note on Toronto Sample Distribution and Weighting

- As with previous market research on UP Express, results from Toronto have been weighted to match the 'catchment area' defined by the updated 2013 ridership forecast
- This weighting was used as a 'best estimate' only, as this weighting represents the ridership, but not necessarily meeter and greeter behaviour
- Furthermore, results from Toronto do not reflect the City of Toronto population – instead they represent the UP Express target market
- Results presented at an overall level include this balancing weight



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—Respondents' main way of getting to/from the airport

- Drive
- Transit—Net includes TTC, GO bus & MiWay (Mississauga/Brampton Transit)
- MiWay and Brampton Transit were combined and are shown as “Other Transit”

Age

- 18-34
- 35-44
- 45-55
- 55+

Gender

- Male/Female

Region—Where respondents currently live within Toronto

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

SUMMARY & IMPLICATIONS

Summary & Implications

- Currently, nearly 70% of Toronto residents have dropped off or picked up a passenger from Pearson Airport in the past year. Nearly all those who drop off passengers also pick them up, and they do so, on average, about 3 times per year.
- Toronto residents tend to rely on a single transportation method when dropping off or picking up passengers from Pearson Airport.
 - Over 70% of Toronto residents rely only on driving when picking up/dropping off, while about 10% rely solely on transit. The remainder use a mix of driving, transit, taxis and limousines.
 - **The implication is that while UP Express may not become the exclusive choice for Meeters & Greeters for all occasions, there are opportunities to win share from a wide variety of sources. In fact, we see Meeters & Greeters anticipating using UP Express instead of driving or TTC for some of their occasions.**
- As we have seen in previous research, the vast majority of Toronto residents leave from their home when traveling to the Airport. This fact helps explain the higher than anticipated usage of Bloor and Weston stations, as those are closer to many residential communities.
 - Furthermore, in terms of station usage, approximately half of Toronto residents say they may use the UP Express station as a meeting point, **suggesting the need to have clearly labeled meeting points at each of the stations.**
- Interestingly, half of those who drop off passengers accompany them into the terminal, while almost 70% of those picking up passengers meet the passenger inside the terminal. **This suggests a need for UP Express signage in both the Arrivals and Departures areas.**
 - Paired with the significant amount of time spent by Meeters & Greeters within the terminal (again, in both the Arrivals and Departures levels), **this suggests a significant retail opportunity for Pearson, and communication opportunities for Metrolinx and UP Express.**

Summary & Implications

- On average, Torontonians spend about 80 minutes traveling round trip to/from the Airport. As speed of travel is one of the top reasons given for taking UP Express, **the amount of travel time saved should continue to be a key message for UP Express advertising.**

- One of the reasons people drive to the Airport is the convenience of residing close to the Airport.

Exclusion per Committee Direction

tickets. Currently, those who drive to the Airport are at on-par with what Toronto residents pay for a taxi (about \$16.00).

- The idea of offering same day return tickets for Meeters & Greeters, to incentivize them to use this method of transportation, particularly relative to driving. Furthermore, as nearly 90% may purchase a one-way ticket for the passenger, **another potential idea to consider is creating a 'Meeter & Greeter Bundle,'** in which a same day return ticket plus a one-way ticket (for the passengers) can be purchased at a discounted rate. As well, UP Express may wish to consider offering a 'Family/Group Bundle' for those who go to the Airport in large groups.

same day return tickets for

Meeters & Greeter, to incentivize them to use this method of transportation, particularly relative to driving. Furthermore, as nearly 90% may purchase a one-way ticket for the passenger, **another potential idea to consider is creating a 'Meeter & Greeter Bundle,'** in which a same day return ticket plus a one-way ticket (for the passengers) can be purchased at a discounted rate. As well, UP Express may wish to consider offering a 'Family/Group Bundle' for those who go to the Airport in large groups.

- Overall, appeal and potential of using UP Express for the purpose of 'Meeting and Greeting' is strong, with **approximately 60% of Toronto residents saying they definitely or probably would use** (and one-third claiming they definitely would use) UP Express when dropping off/picking someone up at the Airport.
- Those who currently use transit for this purpose are the most likely to claim they would use UP Express (about 85% saying definitely/probably would use), although more than half of those who drive are also open to using this method of travel. **This suggests that early adopters of the service will most likely come from those who currently use transit when dropping off/picking up passengers (a relatively small proportion of the population), although there is certainly potential among the larger population of those who drive.**

Summary & Implications

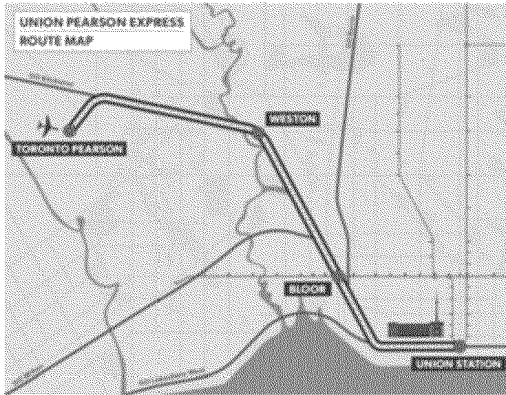
- In fact, the presence of UP Express is likely to influence Toronto residents to accompany/meet passengers in the terminal, with approximately two-thirds saying they would be much or somewhat more likely to do so. In other words, **the existence of UP Express has the potential to create meaningful and memorable moments, which otherwise may have simply been missed (if the pick up/drop off was only at curbside).**
- This provides opportunities to build communication strategies around personal relevance and build an emotional reason for taking UP Express.



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.

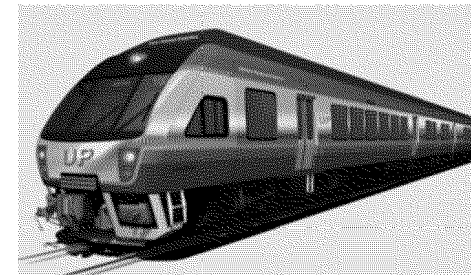
UP Express will transform the way we travel between Union Station and Toronto Pearson. It will enable a stress-free and seamless travel experience that is fast, reliable, convenient and comfortable. It will provide a high-speed, state-of-the-art service with the latest technology, comfortable interior,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

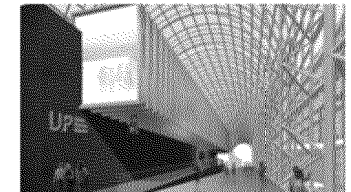
- Charging stations for electronics
- Attendants to provide assistance
- Innovative retail offerings
- Interactive information kiosks
- Food & beverage product samples from local Toronto and Ontario companies



Rendering of UP Express vehicle



Pearson Terminal 1 Station Rendering



Union Station Rendering

Appeal of the UP Express

- Overall, Toronto residents react very positively to the proposition of the UP Express, with nearly 60% finding it very appealing. Those in the Toronto Core are especially likely to find the idea of the UP Express appealing.

Appeal of the UP Express

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

Base: Total sample (n=1,000)

Have Heard of UP Express

59%

■ 8-10%

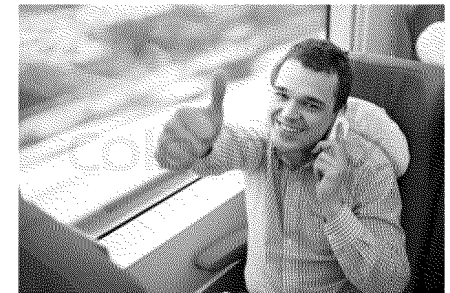
■ 4-7%

■ 1-3%

59%

30%

11%



	Drop off/Pick up		Age				Gender		Current Travel Mode		Region					
	Drop Off	Pick Up	18-34	35-44	45-54	55+	Male	Female	Drive	Transit	Downtown			Toronto		Scarborough ^F
											Core ^A	East ^B	West ^C	East ^D	West ^E	
% 8-10	58	60	59	64	63	54	57	61	58	72	68 ^{BCDE}	57	47	58	48	61 ^C

Q18. The UP Express service will be a dedicated train that will connect Pearson Airport with Union Station in downtown Toronto, and is scheduled to begin service in 2015. Prior to today, have you heard of the Union Pearson Express?

Q19. Based on what you just read, how appealing is UP Express to you, personally, as a method of transportation to take to Pearson when you are **dropping someone off** or **picking someone up** at the Airport?

Likelihood to Use the UP Express

- About 50-60% of Toronto residents say they would definitely/probably use the UP Express when picking up or dropping someone off at the Airport.
- Fewer than 20% of residents are rejectors – with drivers, older Toronto residents and those living outside the downtown core the least likely to be interested in using the UP Express (see Appendix).
- Transit users are significantly more likely than drivers to take UP Express, between 75-90% saying they would use it as when picking up/dropping off passengers.

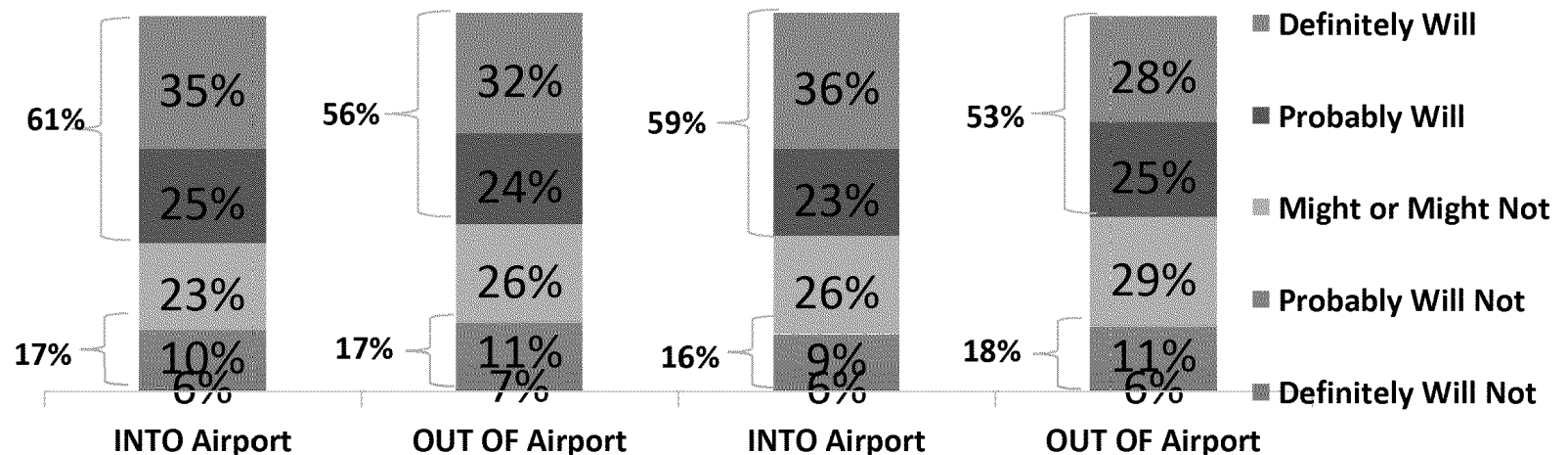
Likelihood to Use the UP Express

Drop Off

Base: Among those dropping off (n=509)

Pick Up

Base: Among those picking up (n=491)



Approximately **55%** of those who ONLY drive are likely to use UP Express



Approximately **85%** of those who ONLY use transit are likely to use UP Express

Q20. How likely would you be to use the UP Express to travel to Pearson when you are **dropping someone off at the Airport?**

Q21. How likely would you be to use the UP Express to travel to Pearson when you are **picking someone up at the Airport?**

Switch From Current Travel Mode to UP Express

- Toronto residents estimate that about one-quarter to one-third of the trips taken to/from the Airport would now be via UP Express – with UP Express primarily taking share from driving occasions; interestingly, behaviour is more likely to change among those who drop off than those who pick up.
- As would be expected, share shift is driven primarily by current method, with share for driving declining specifically for drivers, and TTC among those who take transit (see appendix).

	DROPPING OFF		PICKING UP	
	INTO Airport	OUT OF Airport	INTO Airport	OUT OF Airport
Union Pearson (UP) Express	+33%	+32%	+25%	+25%
Drive and drop off/pick up the person curbside	-10%	-8%	-5%	-6%
Drive, park and accompany into/meet at the terminal	-6%	-9%	-9%	-5%
TTC	-5%	-6%	-2%	-2%
Passenger in a car, where someone else drives and parks at the airport	-2%	-2%	-3%	-5%
Passenger in a car, where someone else drives and we drop off/pick up the person curbside	-2%	-2%	-4%	-3%
Taxi	-3%	-3%	--	-1%
GO Bus	-1%	--	-1%	--
Limousine/car service	-1%	-1%	-1%	-1%
Toronto Airport Express Bus	-1%	--	--	--
Other Transit	--	-1%	-1%	-1%

Q23/Q23b/Q24/Q24b. Assume that in the **next 12 months** you will drop people off at the airport the same number of times as you did in the past 12 months. That said, of the [INSERT RESPONSE FROM Q4] time(s), how often will you use each of the following forms of transportation to travel into Pearson Airport with the person you were dropping off?-

Top 3 Reasons **FOR** and **AGAINST** using UP Express

- The top three reasons **FOR** taking the UP Express are: no traffic jams, quick and reliable (irrespective of whether they are dropping off or picking up passengers).
- The top reason Toronto residents would not consider using UP Express is the anticipated expense. Other reasons include concerns about crowding on the train, the need to take multiple forms of transit, the hassle of going on the train with luggage, and the belief that some of the stations are inconveniently located.



Base: Among those dropping off

56% Would not be subject to traffic jams

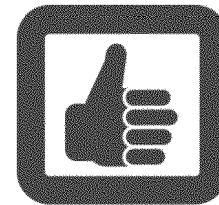
39% Would be expensive

47% Would be the quickest way to get to the Airport

27% Would be crowded/congested

47% Would be reliable

26% Would have to take too many forms of transit



Base: Among those picking up

69% Would not be subject to traffic jams

42% Would be expensive

53% Would be the quickest way to get to the Airport

35% Would have to take too many forms of transit

48% Would be reliable

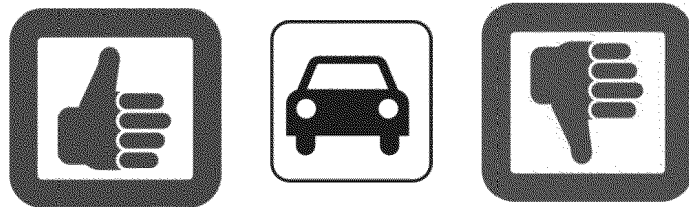
27% Hassle with luggage/station locations inconvenient

Q25. Which of the following are some of the reasons that you would consider taking the UP Express when traveling to/from Pearson to pick someone up or drop someone off? Please select all that apply.

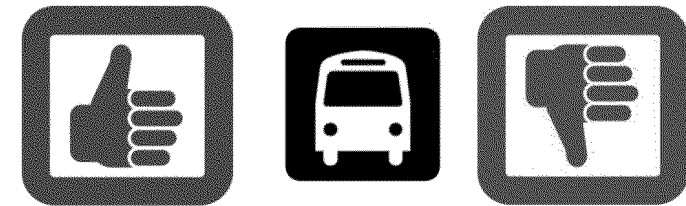
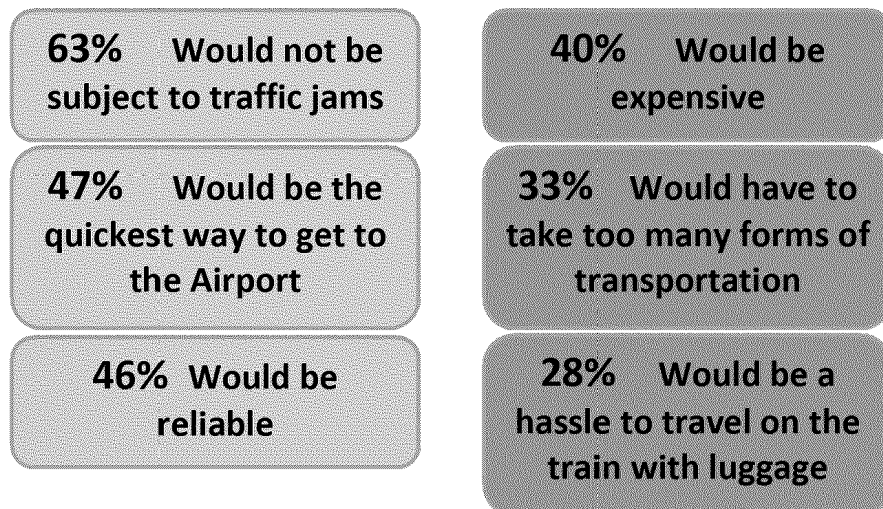
Q26. Which of the following are some of the reasons that you would **not** consider taking the UP Express when traveling to/from Pearson to pick someone up or drop someone off? Please select all that apply.

Top 3 Reasons **FOR** and **AGAINST** using UP Express Among Drivers & Transit Users

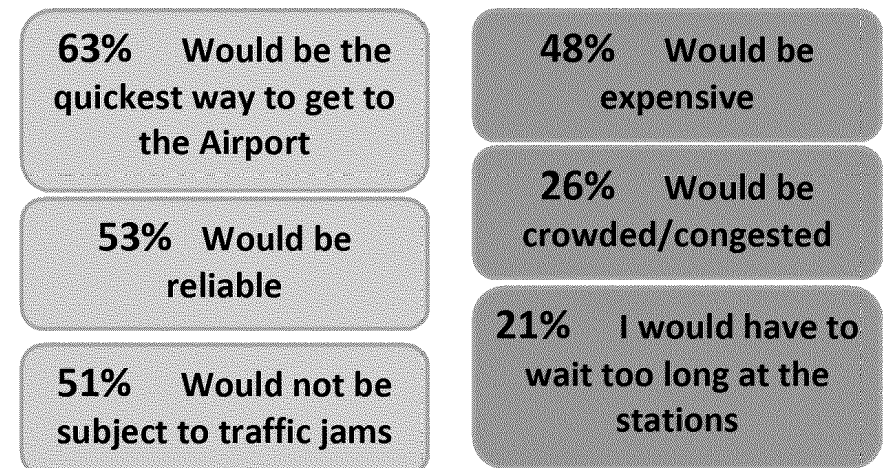
- The top three reasons **FOR** taking the UP Express are also the same for both drivers and transit users. That being said, transit users are far more likely to mention the speed of the UP Express as a positive, while drivers are more interested in the ability to bypass traffic jams.
- The price of the ticket is the main deterrent, with 40% of drivers and 48% of transit users believing it would be expensive. Hassle with the luggage, too many forms of transportation, crowding and long wait times at the stations are also mentioned as reasons **AGAINST** taking UP Express.



Base: Among drivers (n=868)



Base: Among Transit users (n=194)

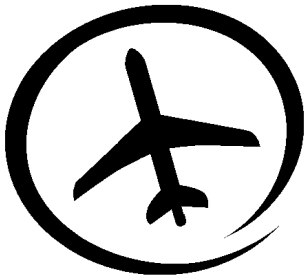


Q25. Which of the following are some of the reasons that you would consider taking the UP Express when traveling to/from Pearson to pick someone up or drop someone off? Please select all that apply.

Q26. Which of the following are some of the reasons that you would **not** consider taking the UP Express when traveling to/from Pearson to pick someone up or drop someone off? Please select all that apply.

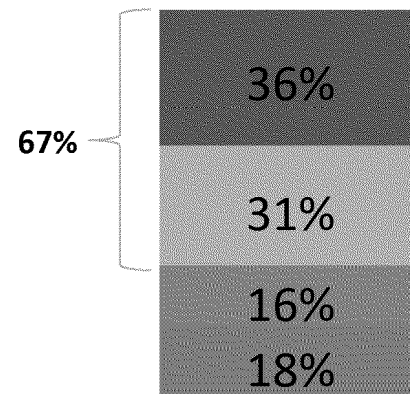
Impact on Likelihood to Accompany / Meet Someone at the Airport

- More than 60% of Toronto residents claim that, because of the UP Express, they will now be more likely to accompany and/or meet someone at the Airport.
- Transit users, younger Toronto residents and those in Scarborough are the most likely to say the UP Express will have a positive impact on their likelihood to accompany passengers to the Airport.



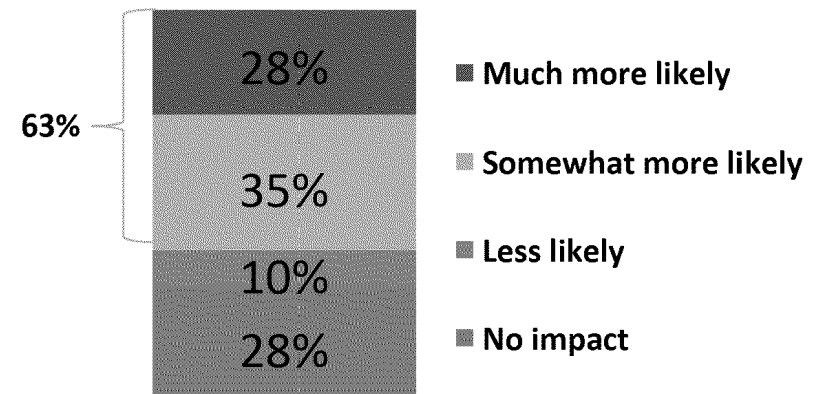
Likelihood to Accompany

Base: Among those dropping off (n=509)



Likelihood to Meet

Base: Among those picking up (n=491)



	Age				Gender		Current Travel Mode		Region					
Accompany	18-34 ^A	35-44 ^B	45-54 ^C	55+ ^D	Male	Female	Drive	Transit	Downtown			Toronto		Scarborough ^F
									Core ^A	East ^B	West ^C	East ^D	West ^E	
Likely*	80 ^{BD}	63 ^D	69 ^D	39	66	67	64	85	67	62	74	69	56	87 ^{ABDE}
Meet														
Likely*	69 ^D	70 ^D	58 ^D	44	65	60	59	85	59	85	59	85	59	85 ^{ABC}

*NOTE: "Likely" combines results for "Much more likely" & "Somewhat more likely"

Q20b. How would the UP Express impact your likelihood to accompany someone to the airport when he/she departs? Would you now be...

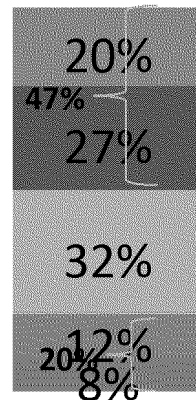
Q21b. How would the UP Express impact your likelihood to meet someone up at the airport when he/she arrives? Would you now be...

Likelihood to Use the UP Express Stations as a Meeting Point

- Respondents were asked if they would use the UP Express stations (Bloor, Weston or Union) as meeting points rather than going to the Airport to drop off and/or pick up. About half of respondents would use the UP Express stations as a meeting point – particularly those who currently use transit when picking up/dropping off passengers.
- Older residents (those 55+) and those living in Downtown West are the least likely to use UP Express stations for this purpose.

Likelihood to Use the UP Express Stations as Meeting Point

Base: Total sample (n=1,000)



- Definitely Will
- Probably Will
- Might or Might Not
- Probably Will Not
- Definitely Will Not

	Age				Gender		Current Travel Mode		Region					
INTO Airport	18-34 ^A	35-44 ^B	45-54 ^C	55+ ^D	Male	Female	Drive	Transit	Downtown			Toronto		Scarborough ^F
									Core ^A	East ^B	West ^C	East ^D	West ^E	
Likely to Use*	51 ^D	58 ^{CD}	46 ^D	31	50	45	47	62	43	48	51	49	51	49
Unlikely to Use*	11	19 ^A	20 ^A	41 ^{ABC}	19	22	20	13	22 ^C	22 ^C	8	24 ^C	19 ^C	15

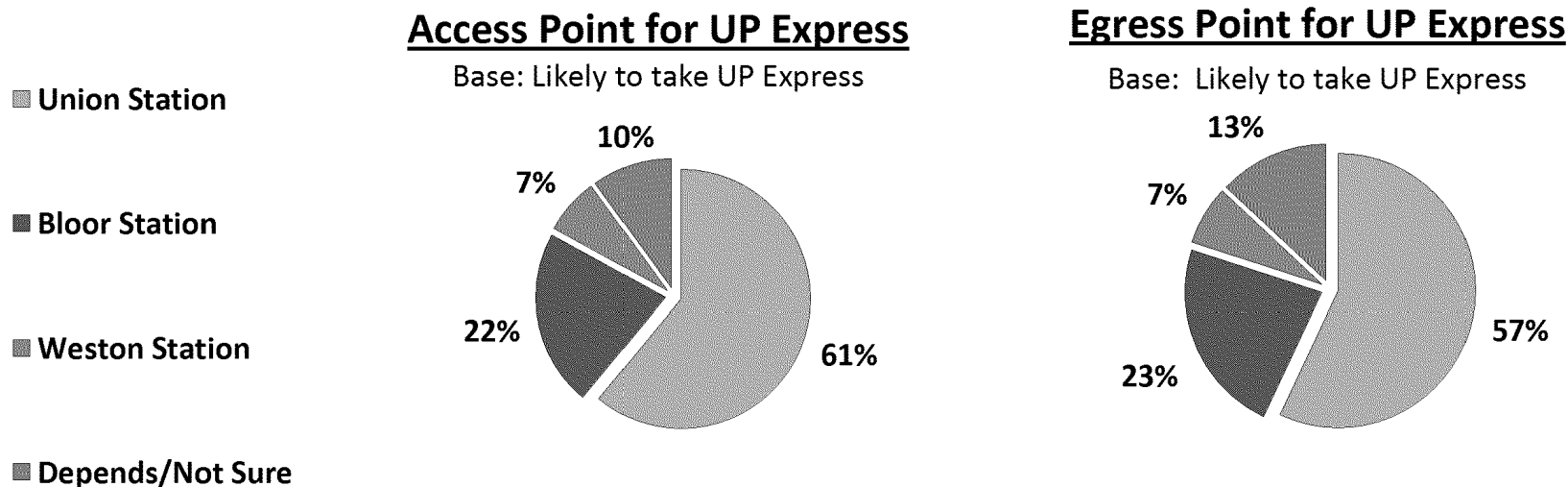
*NOTE: "Likely" combines results for "Definitely Will" & "Probably Will", while "Unlikely" combines results for "Probably Will Not" & "Definitely Will Not".

Q22. Some people have mentioned that rather than taking the UP Express to pick someone up or drop them off, that they would use the UP Express stations (Bloor, Weston or Union) as meeting points (when picking someone up) or drop-off points (when dropping someone off). Given this, how likely would you be to pick up/drop someone off at one of the stations (Bloor, Weston or Union) along the UP Express route?

Access & Egress Points

Likely Access & Egress Points

- While about 60% of Toronto residents likely to take UP Express anticipate using Union Station as an access/egress point, nearly one-quarter anticipate using Bloor Station.
- Given that the majority leave from home when going to Pearson, residents will use the UP Express station closest to them. Therefore, it comes as no surprise then that residents of the Downtown Core are more likely to use Union Station as an access point, while Downtown West residents are more likely to use the Bloor Station and Toronto West residents the Weston Station (see appendix for slide).
- For the vast majority, the access and egress station will be the same.



**86% of the time
the
access/egress
point is the
same**

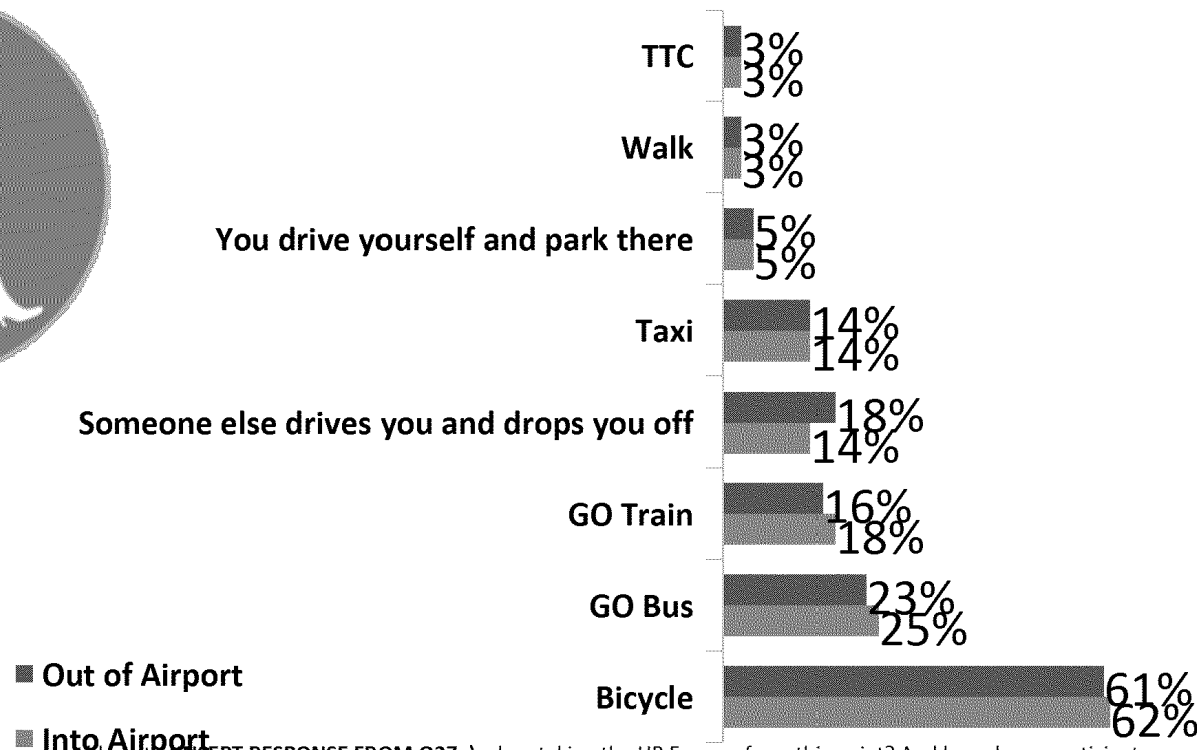
Q27. Thinking about when you would take the UP Express into Pearson Airport to (CELL 1: drop someone off; CELL 2: pick someone up), from which station would you take the UP Express? And when returning from Pearson via the UP Express after (CELL 1: dropping someone off; CELL 2: picking someone up), which station would you get off at?

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

- The majority of respondents say they would most likely take the TTC to and from the Transit station. This is followed, by a wide margin, by walking or driving/parking at the station.
- Residents of the Downtown Core are more likely to say that they would walk to and from the transit station than residents in other catchment areas (see appendix).
- Transit users will take the TTC over other modes, as will drivers, although significantly less so (see appendix).

Main Method of Travelling Between Home/Work and Transit Station

Base: Among those who would use UP Express



Q28. How do you anticipate you would get to (INSERT RESPONSE FROM Q27a) when taking the UP Express from this point? And how do you anticipate you would get from (INSERT RESPONSE FROM Q27B) to your final destination when returning from Pearson Airport via the UP Express? Please select all that apply.

Exclusion per Committee Direction

Pricing

(Note: Metrolinx to provide Van Westendorp analysis)

Understanding Pricing

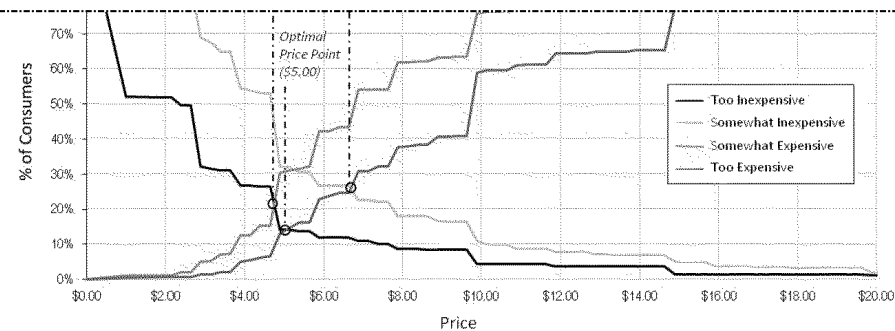
- In order to determine the optimal price point, we utilized two methods:
 1. Conjoint analysis
 2. Van Westendorp pricing

Express, we utilized two

a ticket would cost)

analysis to understand the consumer perceptions of value: how is the price scale that is created by the airline as providing three key

Exclusion per Committee Direction



- Based on return passes
- Those using

or a same day
pick up/drop off



Exclusion per Committee Direction

										Toronto						Scarb. ^F
										Core ^A	East ^B	West ^C	East ^D	West ^E		
Avg. Price	\$16.50	\$14.70	\$12.80	\$16.60	\$15.20	\$15.60	\$14.90	\$15.50	\$16.10	\$17.30 ^{BDE}	\$14.70	\$18.30 ^{BDE}	\$13.90	\$14.20	\$16.70	

Q15. How much do you think a same day return ticket for the UP Express, from (INSERT STATION) to Pearson Airport and back to (INSERT STATION) would cost?

Like

- Slight
a f
on

enger's ticket – although
ger ticket expect to pay

Exclusion per Committee Direction

	18-34 ^A	35-44 ^B	45-54 ^C	55+ ^D	Drive	Transit	Downtown			Toronto		Scarb. ^F
							Core ^A	East ^B	West ^C	East ^D	West ^E	
Likely to pay for passenger*	46 ^D	48 ^D	48 ^D	36	43	56	45 ^C	45 ^C	36	42	48 ^C	54 ^{CD}
Cost of ticket	\$13.00 ^{bCD}	\$11.90	\$10.50	\$10.10	\$12.10	\$11.30	\$12.60 ^B	\$9.80	\$13.50 ^B	\$11.10 ^b	\$11.80 ^b	\$12.90 ^B

*NOTE: "Likely" combines results for "Definitely Will" and "Probably Will"

Q34. How likely would you be to pay for the UP Express fare for your passenger you would be picking up and/or dropping off at the Airport? IF DEFINITELY/PROBABLY/MIGHT...Q35. And how much do you think the traveler's single, one-way ticket for the UP Express, from INSERT STATION) to Pearson Airport would cost?

out half of Meeters &

s prior to the pricing
he trip, with about a

Exclusion per Committee Direction

e-pricing section)

■ Definitely Will

■ Probably Will

■ Might or Might Not

■ Probably Will Not

■ Definitely Will Not

	Age				Travel Mode		Region					
	18-34 ^A	35-44 ^B	45-54 ^C	55+ ^D	Drive	Transit	Downtown			Toronto		Scarb. ^F
							Core ^A	East ^B	West ^C	East ^D	West ^E	
Likely* to take UP if paying for both tickets	52	56	57	50	53	71	56	53	49	55	45	57

*NOTE: "Likely" combines results for "Definitely Will" and "Probably Will"

IF DEFINITELY/PROBABLY/MIGHT...36b. Assuming that you would be paying (AMOUNT FROM Q29+Q35) for 2 tickets – one for yourself and one for the passenger you are picking up/dropping off, how likely are you to take UP Express for this trip?

- The
ret

ound \$14.75 per one day

Exclusion per Committee Direction

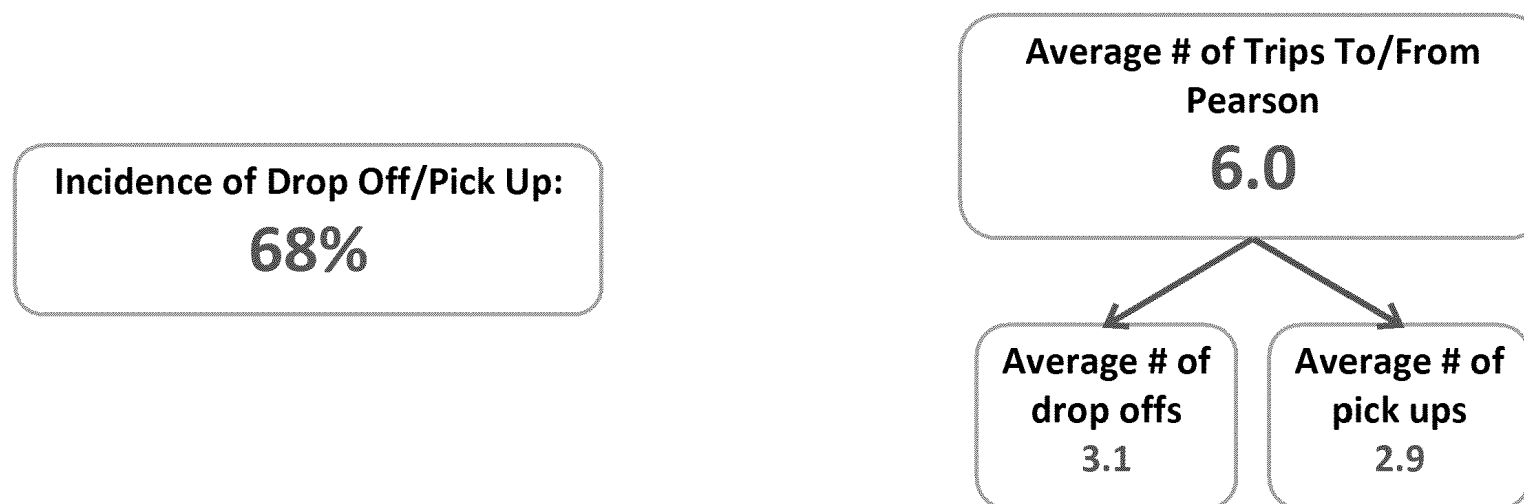


Q30. At what price might you begin to feel that a **same day return ticket** for the UP Express, from **(INSERT STATION)** to Pearson Airport and back to **(INSERT STATION)**, is so inexpensive that you would not trust the quality of service (i.e. safety, reliability, on-time service, comfort, seat availability)? Q31. At what price might you begin to feel that a **same day return ticket** for the UP Express, from **(INSERT STATION)** to Pearson Airport and back to **(INSERT STATION)**, is inexpensive, but probably of acceptable quality of service (i.e. safety, reliability, on-time service, comfort, seat availability)? Q32. At what price might you begin to feel that a **same day return ticket** for the UP Express, from **(INSERT STATION)** to Pearson Airport and back to **(INSERT STATION)**, is expensive, but still a possible purchase? Q33. At what price might you begin to feel that a **same day return ticket** for the UP Express, from **(INSERT STATION)** to Pearson Airport and back to **(INSERT STATION)**, is too expensive to purchase, regardless of its quality of service (i.e. safety, reliability, on-time service, comfort, seat availability)?

Current Travel To & From Airport

Drop Off and Pick Up Behaviour in the Past 12 Months

- Approximately 70% of Toronto residents have dropped off or picked up a passenger from the airport in the past year.
- Among those who do, nearly all (89%) Toronto residents both drop off and pick up passengers, and on average, people drop off/pick up passengers about 3 times a year.



	Total	Current Travel Mode		Region					
		Drive	Transit	Downtown			Toronto		Scarborough ^F
				Core ^A	East ^B	West ^C	East ^D	West ^E	
Average # of drop offs	3.1	3.2	5.0	2.8	2.8	3.1	2.9	4.1	4.2 ^{AD}
Average # of pick ups	2.9	3.0	4.5	2.7	2.4	3.0	2.5	3.8 ^{BD}	3.9 ^{BD}
Both pick up and drop off (%)	88	91	87	87	88	91	85	92 ^D	95 ^{AD}
Drop off only (%)	7	5	9	7 ^E	9 ^E	6	11 ^{EF}	3	4
Pick up only (%)	4	4	4	5 ^F	3	3	4	5	1

Q4. How many times in the past 12 months have you **dropped someone off** at Toronto Pearson International Airport?

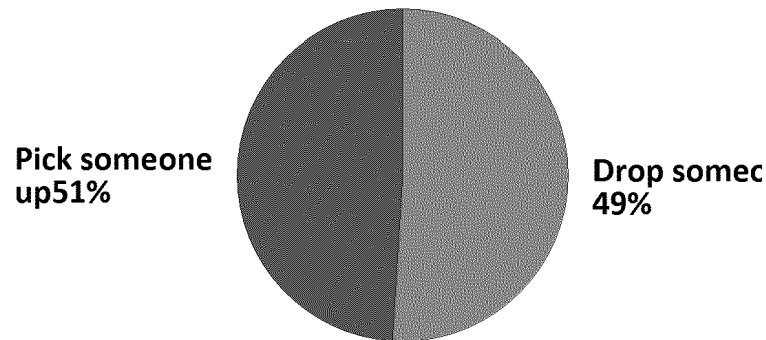
Q5. How often, if ever, have you **picked someone up** at Toronto Pearson International Airport in the **past 12 months**?

Most Recent Trip to the Airport

- The vast majority (nearly 70%) of those who both pick up and drop off passengers provide 'round trip service' for the passenger – both dropping them off at the airport and picking them up.

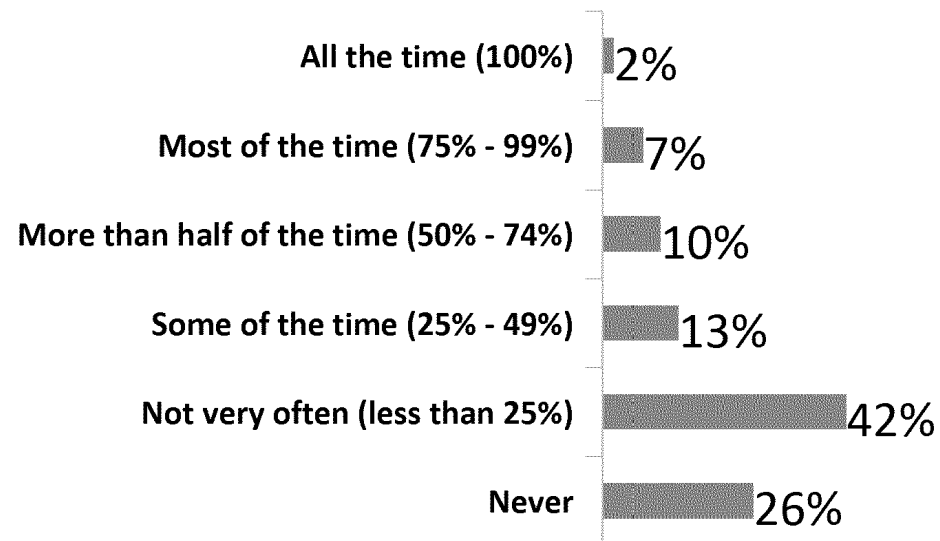
Most recent trip

Base: Among those who pick up and drop off (n=887)



Pick Up and Drop Off Same Person

Base: Among those who pick up and drop off (n=887)



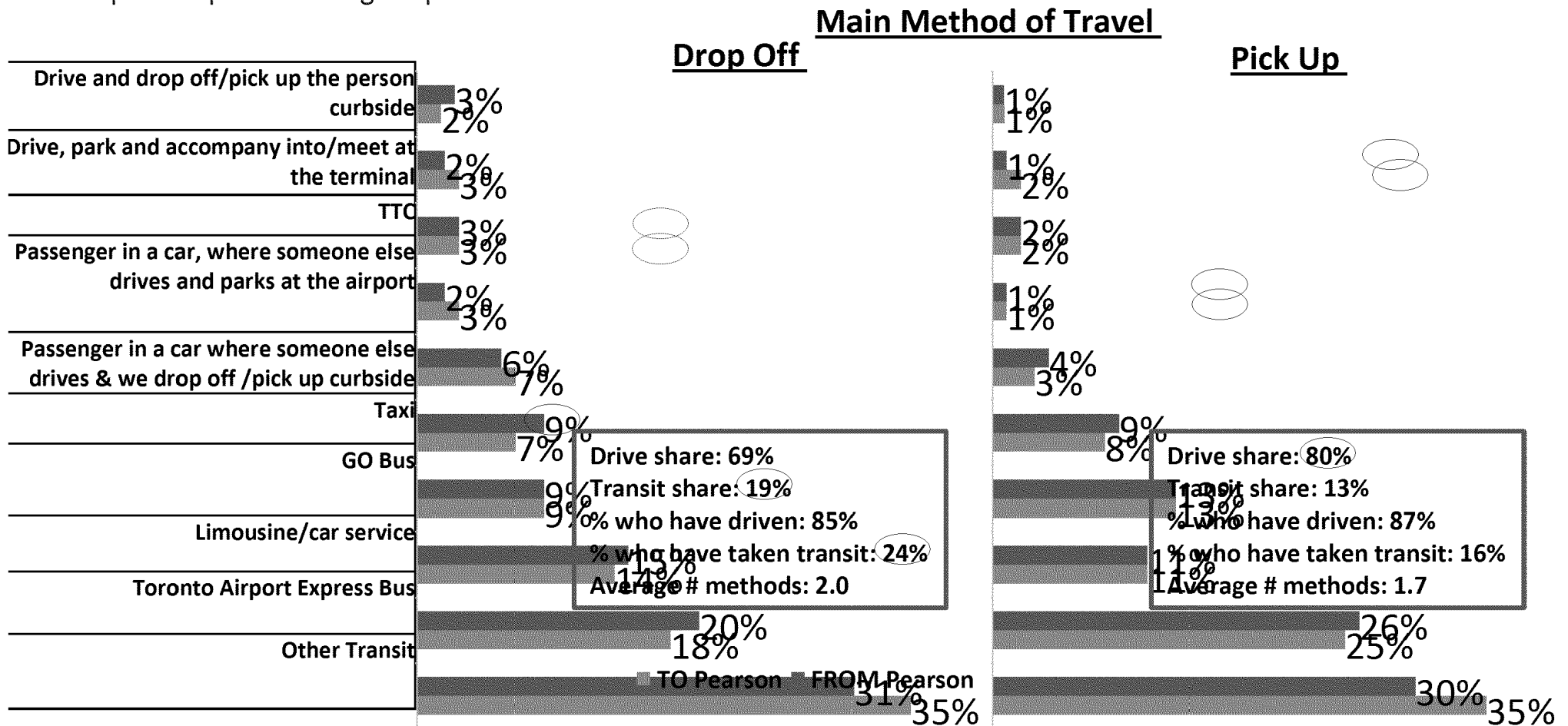
Same person drop off and pick up	Total	Gender		Current Travel Mode		Region					
		Male	Female	Drive	Transit	Downtown			Toronto		Scarborough ^F
						Core ^A	East ^B	West ^C	East ^D	West ^E	
All the time	26	28	24	26	24	22	24	34 ^A	30	29	26
Most of the time	42	39	45	44	43	41	40	38	45	47	42

Q5b. Was your most recent trip to Toronto Pearson International Airport to pick someone up at the airport, or to drop them off?

Q5c. Approximately, what proportion of the time do you both drop a person off and pick that same person up from the Airport when they return?

Main Method of Travel TO/FROM Pearson

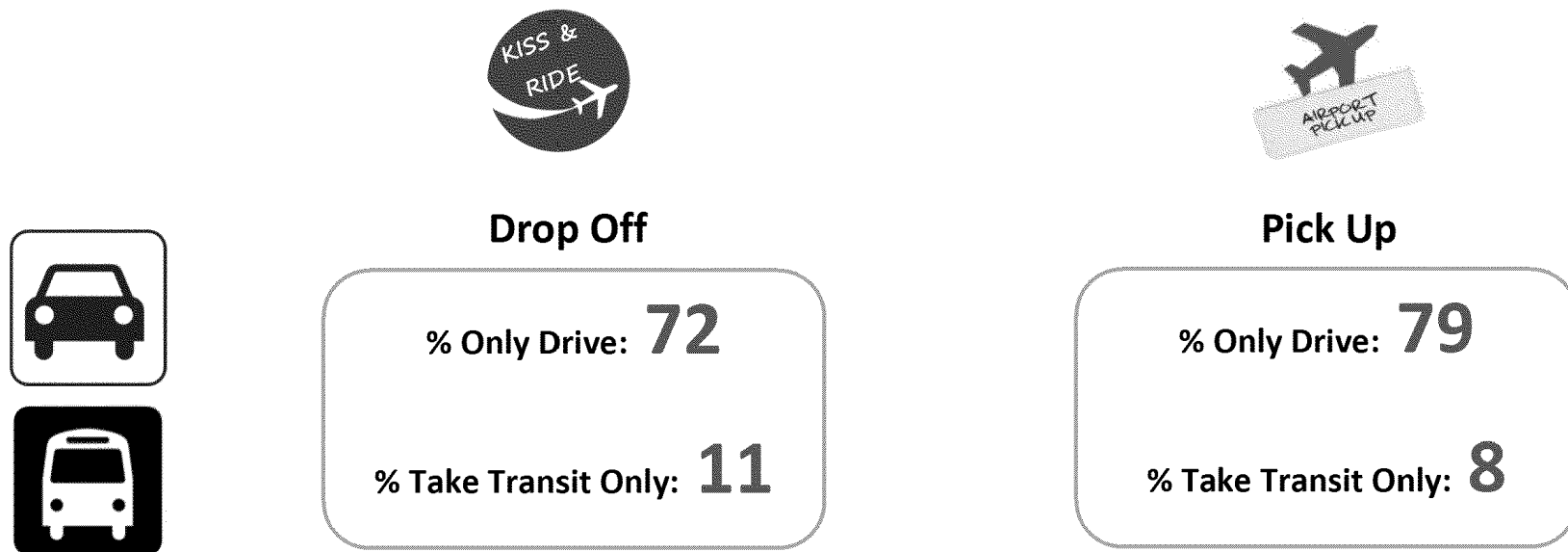
- Curbside drop-off/pick-up accounts for about one-third of the trips to/from the airport, while about 20-25% of trips involve driving and parking to accompany the passenger/meet him in the terminal.
- Driving captures a greater share of pick-ups than it does drop-offs, with a greater proportion of Toronto residents taking transit when dropping off than when picking up, suggesting that there may be more opportunities for UP Express 'uptake' during drop-off occasions.



Q8. Of the time(s) that you dropped a person off at the airport, how many times did you use the following methods of transportation to travel into Pearson Airport with the person you were dropping off?
 Q8b. Of the time(s) that you dropped a person off at the airport, how many times did you use the following methods of transportation when leaving Pearson Airport, after you had dropped off the person?
 Q14. Of the time(s) that you picked someone up at the airport, how many times did you use the following methods of transportation to travel into Pearson Airport when **picking someone up** at the Airport?

Main Method of Travel – Cross-Usage

- While there is some cross-usage between modes of transportation (see following slides), in general, the majority of Toronto residents rely on a single form of transportation when picking up or dropping off passengers – specifically, driving. In fact, over 70% of Toronto residents only drive when dropping off or picking up passengers.
- The implication is that while UP Express may not become the exclusive choice for Meeters & Greeters for all occasions, there are opportunities to win share from a wide variety of sources. In fact, as noted previously, Meeters & Greeters anticipate using UP Express instead of driving or TTC for some of their occasions.



Drop Off / Pick Up Sequence of Events

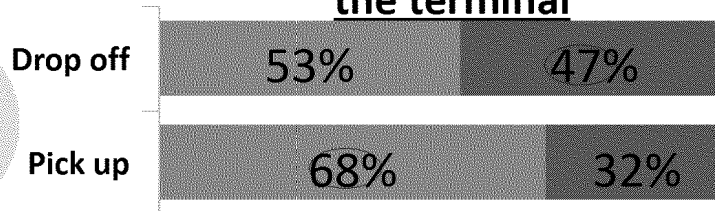
- For drop off, the majority of respondents leave from home with their passenger(s), with about half accompanying the passenger into the terminal and half dropping them off curbside.
- For pick-up, while they are also likely to leave from home and return to the same destination, Meeters/Greeters are more likely to go inside the terminal when picking up a passenger compared with when dropping them off.



Left from...

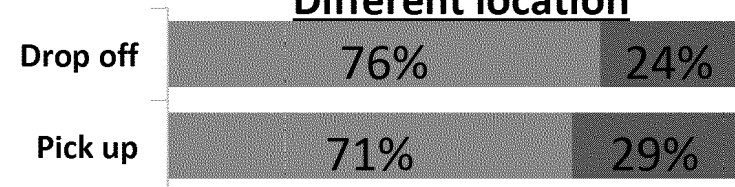


Accompanied into/met in the terminal



■ Yes ■ No

Same location vs. Different location



■ The same location
■ Along the way/Different location

Q6. When traveling into Pearson Airport to drop someone off at Toronto Pearson International Airport, do you mainly leave from your home or from your place of business?

Q7. Thinking about the last time you dropped someone off at the Airport, did that person leave from the same location as you, or did you pick him/her up along the way?

Q9. Thinking about the last time you dropped someone off at the airport, did you accompany him/her into the terminal?

Q12. When traveling into Pearson Airport to pick someone up at Toronto Pearson International Airport, do you mainly leave from your home or from your place of business?

Q13. Thinking about the last time you picked someone up at the Airport, did that person go to the same destination as you or did you drop off at a different location?

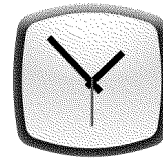
Travel Time to the Airport

- Overall, Toronto residents spend about 40 minutes traveling to the airport when dropping off/picking up passengers.
- Transit users spend about 10-15 minutes longer traveling to or from the airport compared with drivers.

When Dropping Off

Average travel time to the Airport (minutes)

41

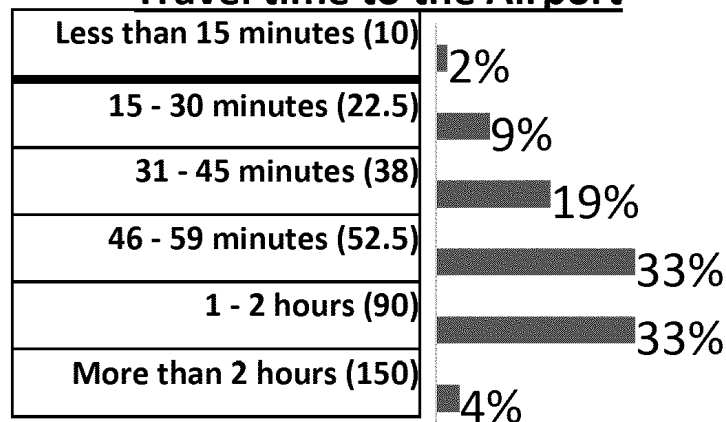


When Picking Up

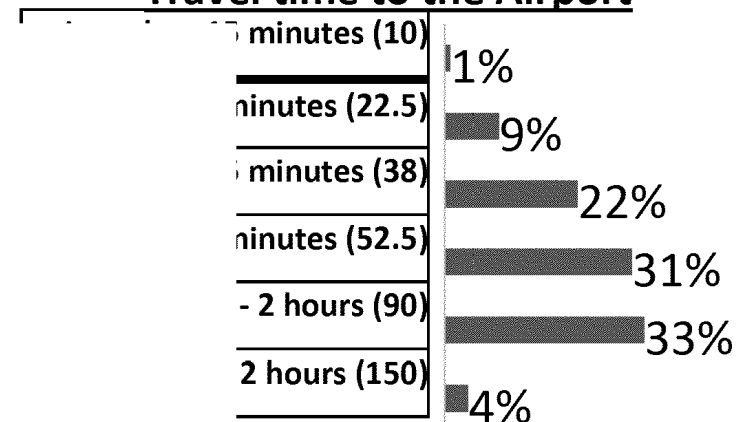
Average travel time to the Airport (minutes)

41

Travel time to the Airport



Travel time to the Airport



Average travel time to the Airport (minutes)	Total	Current Travel Mode		Region					
		Drive	Transit	Downtown			Toronto		Scarborough ^F
				Core ^A	East ^B	West ^C	East ^D	West ^E	
When dropping off	41	39	47	46 ^{CE}	44 ^E	38 ^E	40 ^E	29	45 ^E
When picking up	41	39	55	45 ^E	41 ^E	43 ^E	42 ^E	30	48 ^E

Q11. Thinking about the last time you dropped someone off at the airport, how much time did it take you to get from your starting point (home, office, etc) to the Airport? (n=509)

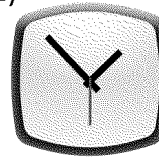
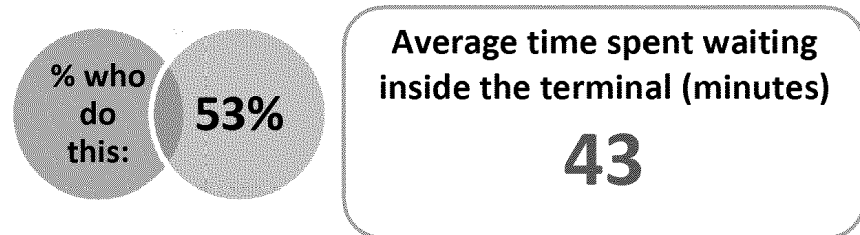
Q17. Thinking about the last time you picked someone up at the Airport, how much time did it take you to get from your starting point (home, office, etc) to the Airport? (n=491)

Time Spent at the Terminal

- For those who go into the terminal, on average, 43 minutes are spent inside the terminal with the person they were dropping off, compared with 36 minutes when waiting to pick up their passenger(s). Downtown East residents spend the most time at the terminal at drop off (52 minutes).

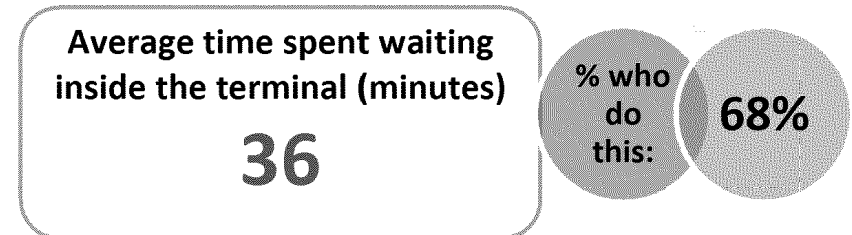
When Dropping Off

Base: Among those who go into terminal (n=271)

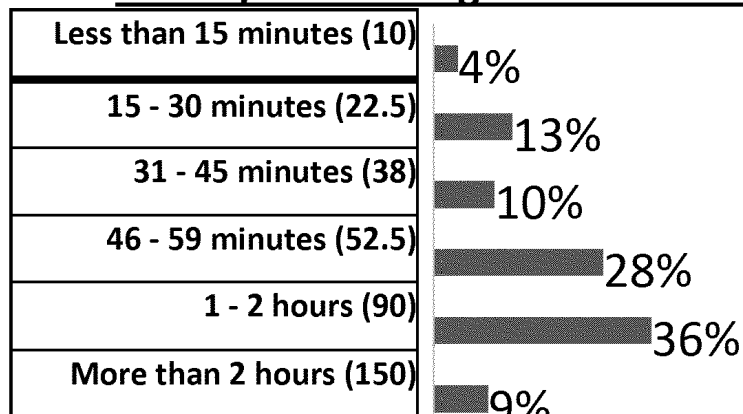


When Picking Up

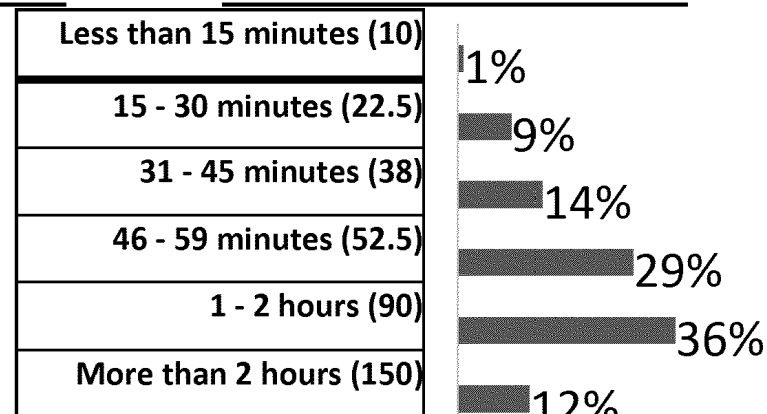
Base: Among those who go into terminal (n=336)



Time spent waiting inside the terminal



Time inside the terminal



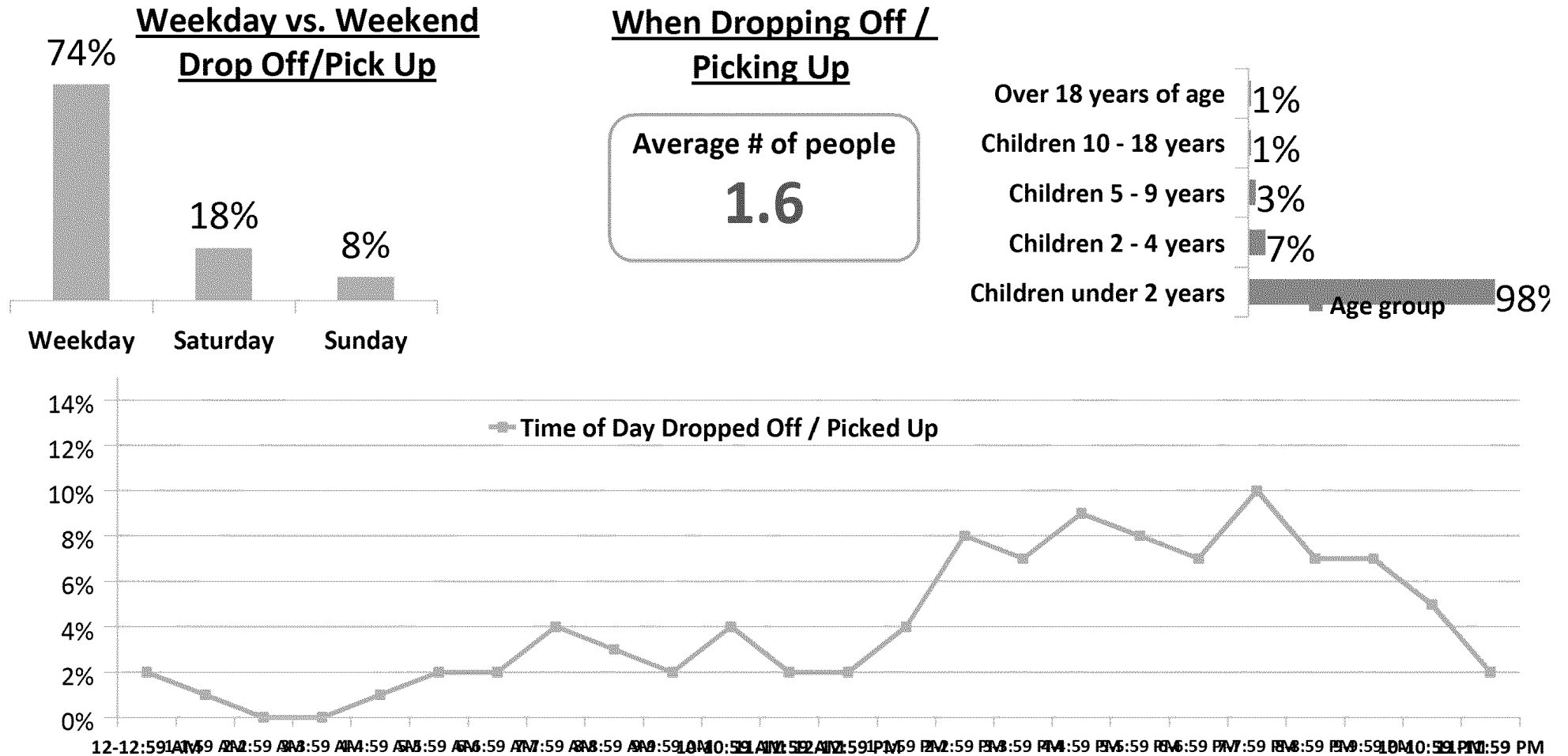
Average time spent inside the terminal (minutes)	Total	Current Travel Mode		Region					
		Drive	Transit	Downtown			Toronto		Scarborough ^F
				Core ^A	East ^B	West ^C	East ^D	West ^E	
When dropping off	43	44	40	41	52 ^{DF}	40	38	47 ^F	34
When picking up	36	36	38	36	37	42	35	36	37

Q10. And how much time did you spend waiting inside the terminal with the person you were dropping off? Q16. And how much time did you spend waiting inside the terminal for the person to arrive?

Q16. And how much time did you spend waiting inside the terminal for the person to arrive?

Drop Off and Pick Up Days and Times

- Nearly all passengers dropped off/picked up are adults, and on average, Meeters/Greeters drop off or pick up about 2 passengers.
- The bulk of passenger drop offs and pick ups occur weekdays between 2:00PM and 10:00PM.



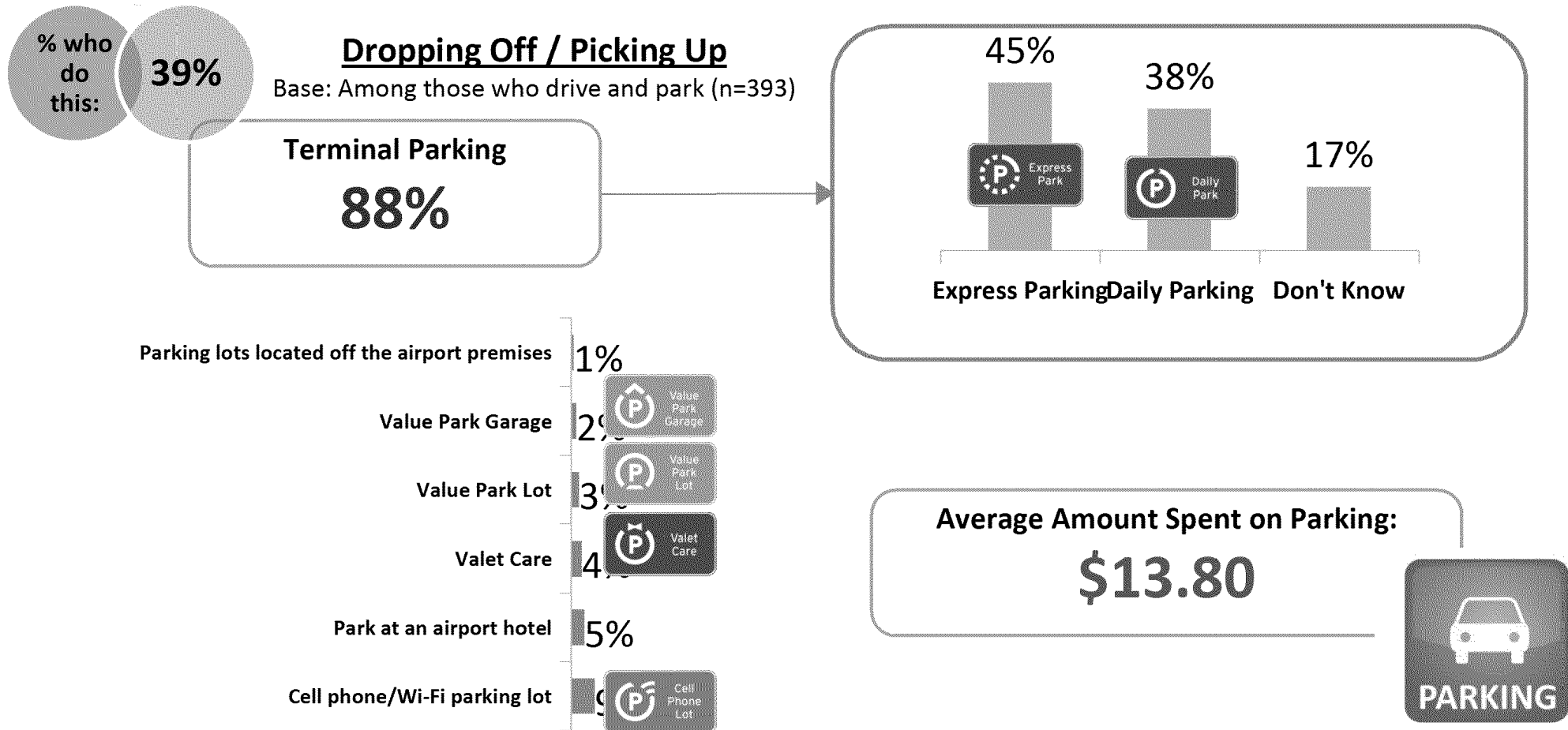
Q36. Thinking about this last time, how many people did you (CELL 1: drop off; CELL 2: pick up)?

Q37. Of the (INSERT NUMBER FROM Q36) people you (CELL 1: dropped off; CELL 2: picked up), how many were...

Q38. Still thinking about this last occasion, approximately what time of day did you (CELL 1: drop off; CELL 2: pick up) the person/people? Please round to the nearest 30 minute increment. Q39. And was it a...

Parking at Pearson

- The vast majority of those who drive and park use Terminal Parking – and the Express Parking option in particular.
- On average, about \$14 is spent on parking.



Q40. IF DRIVE THEMSELVES & PARK AT Q8/Q14 ASK... Which parking option do you usually select when you drive and park at the Airport, when (CELL 1: dropping someone off; CELL 2: picking someone up)? Please select all that apply.

Q41. IF TERMINAL PARKING AT Q40, ASK... And at the Terminal, do you park in the Express or Daily parking lot?

Q42. IF DRIVE & PARK AT TERMINAL AT Q8/Q14, ASK: And how much did you pay for parking? Please give your best estimate.

APPENDIX 1: Demographics

Respondent Profile

Gender	Male	46%
	Female	54%
Age	18 to 24	13%
	25-34	32%
	35-44	17%
	45-54	16%
	55-64	14%
	65+	8%
	Average	40.5
Catchment Area	Downtown Core	39%
	Downtown East	15%
	Downtown West	8%
	Toronto East	18%
	Toronto West	17%
	Scarborough	4%

Respondent Profile *continued*

Employment status	Employed full time	57%
	Employed part time	9%
	Self-employed	9%
	Student	7%
	Full time homemaker	4%
	Retired	10%
	Unemployed	3%
	Prefer not to answer	2%
Income	Under \$25,000	8%
	\$25,000 to \$49,999	24%
	\$50,000 to \$74,999	19%
	\$75,000 to \$99,999	14%
	\$100,000 to \$124,999	15%
	\$125,000 to \$149,999	4%
	\$150,000 or more	6%
	Prefer not to answer	10%
	Average	\$74.4K

Respondent Profile *continued*

Marital status	Single, never married	38%
	Married/common law	52%
	Widowed	2%
	Divorced/separated	7%
Household composition	Children under 2 years	5%
	Children 2-4 years	6%
	Children 5-9 years	13%
	Children 10-18 years	15%
	No children	70%

APPENDIX 2: Take rate

Switch From Current Travel Mode to UP Express Among those who drive to/from Airport



	DROPPING OFF		PICKING UP	
	INTO Airport	OUT OF Airport	INTO Airport	OUT OF Airport
Union Pearson (UP) Express	+31%	+32%	+24%	+25%
Drive and drop off/pick up the person curbside	-12%	-10%	-6%	-7%
Drive, park and accompany into/meet at the terminal	-7%	-10%	-10%	-6%
TTC	-3%	-3%	-1%	-1%
Passenger in a car, where someone else drives and parks at the airport	-2%	-2%	-3%	-6%
Passenger in a car, where someone else drives and we drop off/pick up the person curbside	-2%	-2%	-4%	-4%
Taxi	-1%	-2%	--	--
GO Bus	-1%	--	--	--
Limousine/car service	-1%	-1%	--	-1%
Toronto Airport Express Bus	-1%	--	--	--
Other Transit	--	-2%	--	-1%

Q23/Q23b/Q24/Q24b. Assume that in the **next 12 months** you will drop people off at the airport the same number of times as you did in the past 12 months. That said, of the [INSERT RESPONSE FROM Q4] time(s), how often will you use each of the following forms of transportation to travel into Pearson Airport with the person you were dropping off?-

Switch From Current Travel Mode to UP Express

Among those who take public transit to/from Airport



	DROPPING OFF		PICKING UP	
	INTO Airport	OUT OF Airport	INTO Airport	OUT OF Airport
Union Pearson (UP) Express	+40%	+38%	+22%	+23%
Drive and drop off/pick up the person curbside	-2%	-2%	+2%	-3%
Drive, park and accompany into/meet at the terminal	-4%	-5%	-3%	+2%
TTC	-16%	-19%	-8%	-9%
Passenger in a car, where someone else drives and parks at the airport	-2%	+1%	-3%	-6%
Passenger in a car, where someone else drives and we drop off/pick up the person curbside	--	+1%	-5%	-1%
Taxi	-6%	-6%	--	-1%
GO Bus	-4%	-2%	-1%	-2%
Limousine/car service	-3%	-1%	-1%	-1%
Toronto Airport Express Bus	-4%	-1%	-3%	--
Other Transit	-1%	-4%	-1%	-2%

Q23/Q23b/Q24/Q24b. Assume that in the **next 12 months** you will drop people off at the airport the same number of times as you did in the past 12 months. That said, of the [INSERT RESPONSE FROM Q4] time(s), how often will you use each of the following forms of transportation to travel into Pearson Airport with the person you were dropping off?-

Likelihood to Use the UP Express – by Key Subgroups

DROP OFF	Age				Gender		Current Travel Mode		Region					
INTO Airport	18-34 ^A	35-44 ^B	45-54 ^C	55+ ^D	Male	Female	Drive	Transit	Downtown			Toronto		Scarborough ^F
									Core ^A	East ^B	West ^C	East ^D	West ^E	
Likely to Use*	66 ^D	64 ^D	66 ^D	42	62	58	57	80	66 ^C	56	53	65 ^C	44	71 ^C
Unlikely to Use*	11	12	16	33 ^{ABC}	18	16	18	7	14	18	8	19 ^C	26 ^C	13
OUT OF Airport														
Likely to Use*	59 ^D	63 ^D	64 ^D	42	57	56	55	74	63 ^{CE}	54 ^E	45	63 ^{CE}	37	67 ^{CE}
Unlikely to Use*	14	13	15	32 ^{ABC}	19	17	18	11	14	20 ^F	15	19 ^F	31 ^{ACF}	7

PICK UP	Age				Gender		Current Travel Mode		Region					
INTO Airport	18-34 ^A	35-44 ^B	45-54 ^C	55+ ^D	Male	Female	Drive	Transit	Downtown			Toronto		Scarborough ^F
									Core ^A	East ^B	West ^C	East ^D	West ^E	
Likely to Use*	60	58	59	57	58	60	55	90	60	63	50	60	54	69
Unlikely to Use*	8	17 ^A	18 ^A	27 ^A	19	13	17	5	10	22 ^A	14	17	20	15
OUT OF Airport														
Likely to Use*	52	56	53	54	54	52	49	84	57	57	44	49	50	52
Unlikely to Use*	12	17	20	28 ^A	18	17	20	2	12	22 ^A	18	23 ^A	21	17

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

Q20. How likely would you be to use the UP Express to travel to Pearson when you are **dropping someone off at the Airport?**

Q21. How likely would you be to use the UP Express to travel to Pearson when you are **picking someone up at the Airport?**

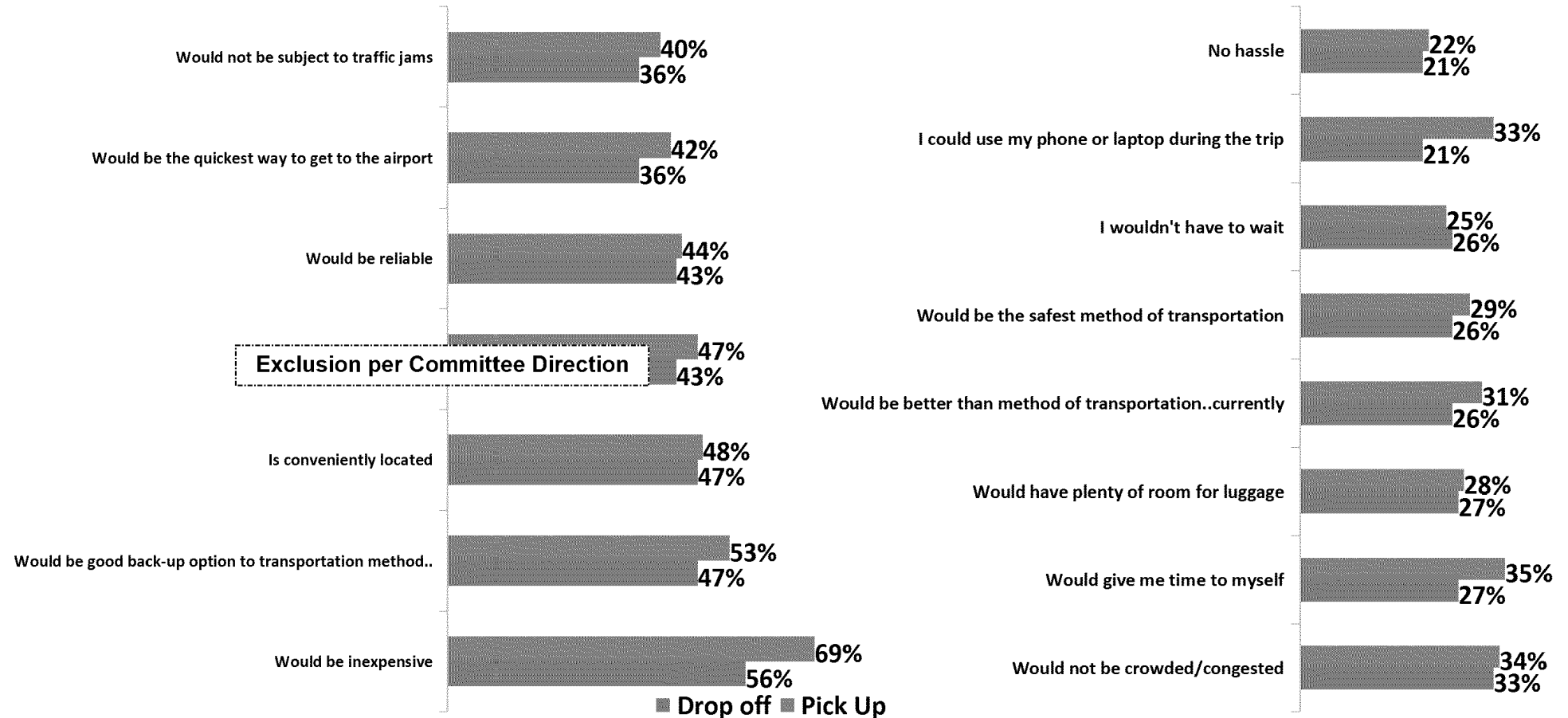
APPENDIX 3: Reasons for Taking UP

Top Reasons FOR Taking UP Express

- Avoiding traffic jams, it would be quick, reliable and comfortable are the top reasons Toronto residents would take the UP Express.

Reasons for Taking UP Express

Base: Total sample (n=1,000)



Q25. Which of the following are some of the reasons that you would consider taking the UP Express when traveling to/from Pearson to pick someone up or drop someone off? Please select all that apply.

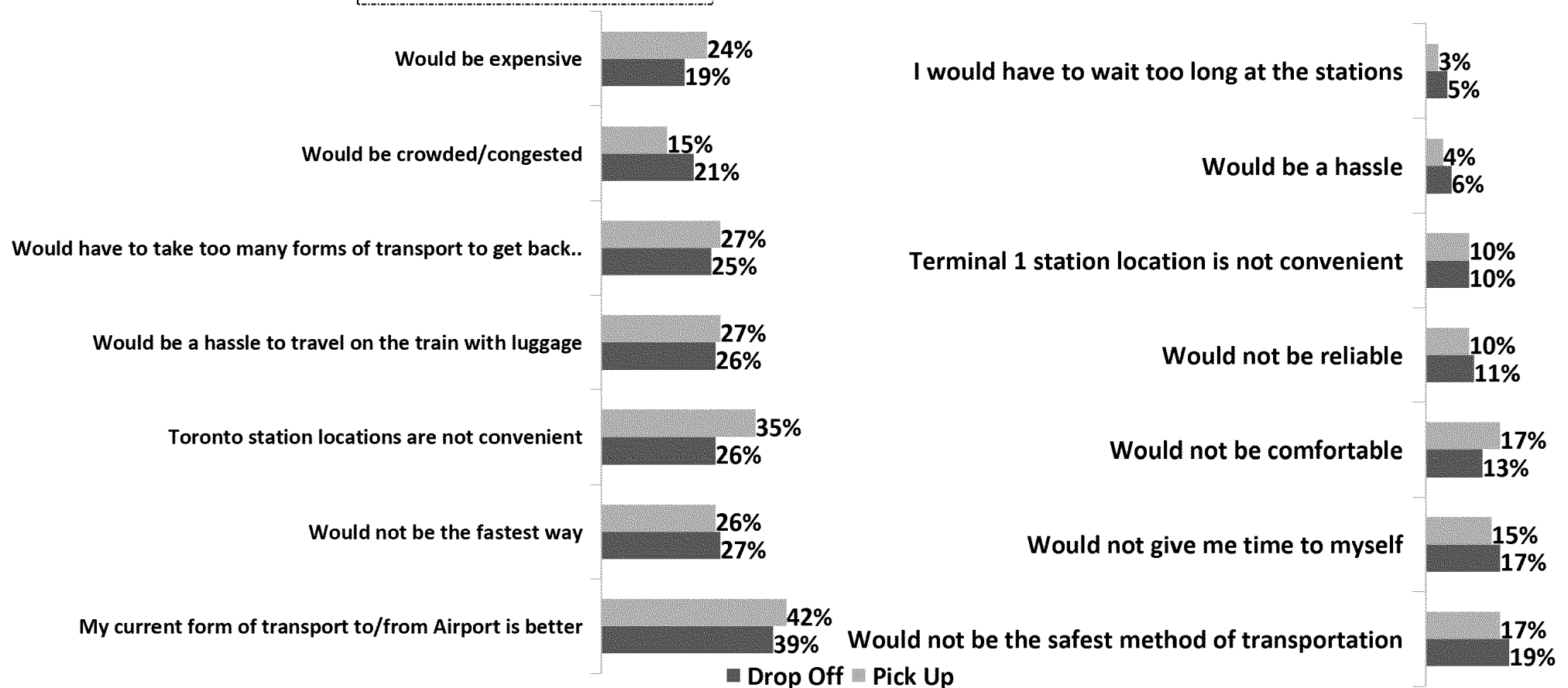
Top Reasons **AGAINST** Taking UP Express

- On the other hand, the perception UP Express would be expensive, crowded and riders would have to take too many forms of transport are the main reasons **AGAINST** taking the UP Express.

Reasons Against Taking UP Express

Base: Total sample (n=1,000)

Exclusion per Committee Direction



Q26. Which of the following are some of the reasons that you would **not** consider taking the UP Express when traveling to/from Pearson to pick someone up or drop someone off? Please select all that apply.

APPENDIX 4: Journey Details

Drop Off / Pick Up Sequence of Events by Key Sub-Groups

- Transit users are significantly more likely than drivers to accompany passengers into the terminal building at drop off as well as meet them inside the terminal at pick up.
- Interestingly, those from Scarborough are the most likely of all Toronto residents to accompany passengers into the terminal when dropping them off. One potential hypothesis is that this group may be more inclined, due to cultural values, to accompany friends/relatives into the terminal.

	Age				Gender		Current Travel Mode		Region					
Left from home	18-34 ^A	35-44 ^B	45-54 ^C	55+ ^D	Male	Female	Drive	Transit	Downtown			Toronto		Scarborough ^F
									Core ^A	East ^B	West ^C	East ^D	West ^E	
Drop Off	97	96	98	97	96	98	97	92	98	98	96	98	95	93
Pick Up	97	94	97	92	93	97	95	95	97	91	96	96	96	94
Same location														
Drop Off	80 ^D	72	83 ^D	68	72	80	75	79	76	82	81	73	74	78
Pick Up	75	69	66	67	68	74	70	79	79 ^{BD}	65	68	63	69	65
Accompanied into/met at the terminal														
Drop Off	62 ^{BD}	44	57 ^D	41	55	51	49	80	48	55	60	54	55	76 ^{ABDE}
Pick Up	68	72	68	67	72	65	65	96	69	67	66	65	71	75

Q6. When traveling into Pearson Airport to drop someone off at Toronto Pearson International Airport, do you mainly leave from your home or from your place of business?

Q7. Thinking about the last time you dropped someone off at the Airport, did that person leave from the same location as you, or did you pick him/her up along the way?

Q9. Thinking about the last time you dropped someone off at the airport, did you accompany him/her into the terminal?

Q12. When traveling into Pearson Airport to pick someone up at Toronto Pearson International Airport, do you mainly leave from your home or from your place of business?

Q13. Thinking about the last time you picked someone up at the Airport, did that person go to the same destination as you or did you drop off at a different location?

Likely Access & Egress Points

- Given that the majority leave from home when going to Pearson, residents will use the UP Express station closest to them. Therefore, it comes as no surprise then that residents of the Downtown Core are more likely to use Union Station as an access point, while Downtown West residents are more likely to use the Bloor Station and Toronto West residents the Weston Station.

	Age				Gender		Current Travel Mode		Region					
Station to get ON at	18-34 ^A	35-44 ^B	45-54 ^C	55+ ^D	Male	Female	Drive	Transit	Downtown			Toronto		Scarborough ^F
									Core ^A	East ^B	West ^C	East ^D	West ^E	
Union	56	67 ^A	59	69	61	60	60	59	79 ^{BCDEF}	70 ^{CEF}	26	57 ^{CE}	25	49 ^{CE}
Bloor	26 ^{BD}	16	22	14	25	19	20	27	16	17	62 ^{ABDEF}	23	20	23
Weston	8	6	6	7	7	7	8	5	1	4	8 ^A	4	35 ^{ABCDF}	5 ^A

	Age				Gender		Current Travel Mode		Region					
Station to get OFF at	18-34 ^A	35-44 ^B	45-54 ^C	55+ ^D	Male	Female	Drive	Transit	Downtown			Toronto		Scarborough ^F
									Core ^A	East ^B	West ^C	East ^D	West ^E	
Union	49	65 ^A	60 ^A	66 ^A	60	55	45	49	76 ^{BCDEF}	62 ^{CE}	22	51 ^{CE}	22	42 ^{CE}
Bloor	29 ^{BD}	18	21	13	23	23	19	29	17	20	65 ^{ABDEF}	23	24	27 ^A
Weston	9	3	7	5	7	6	10	6	1	6 ^A	9 ^A	5 ^A	26 ^{ABCDF}	7 ^A

Q27. Thinking about when you would take the UP Express into Pearson Airport to (CELL 1: drop someone off; CELL 2: pick someone up), from which station would you take the UP Express? And when returning from Pearson via the UP Express after (CELL 1: dropping someone off; CELL 2: picking someone up), which station would you get off at? AMONG THOSE LIKELY TO TAKE UP EXPRESS

Main Method of Travelling Between Home/Work and Transit Station *(and vice versa)* — By Key Subgroups

- Residents of the Downtown Core are more likely to say that they would walk to and from the transit station than residents in other catchment areas.
- Transit users will take the TTC over other modes, as will drivers, although significantly less so.

Home/Work to Transit Station	Age				Gender		Current Travel Mode		Region					
	18-34 ^A	35-44 ^B	45-54 ^C	55+ ^D	Male	Female	Drive	Transit	Downtown			Toronto		Scarborough ^F
									Core ^A	East ^B	West ^C	East ^D	West ^E	
TTC	65 ^C	64 ^C	49	66 ^C	60	64	59	74	61 ^E	65 ^E	67 ^E	73 ^{AE}	45	75 ^{AE}
Walk	25	29	27	21	25	25	25	31	44 ^{BCDEF}	19 ^D	15 ^D	4	11	11
Drive & Park	19	14	20	17	22	14	20	13	9	18 ^A	26 ^{AD}	14	40 ^{ABD}	30 ^{AD}
Taxi	11	20 ^A	20 ^A	13	15	14	14	15	14	16	19	13	12	14

Transit Station to final destination	Age				Gender		Current Travel Mode		Region					
	18-34 ^A	35-44 ^B	45-54 ^C	55+ ^D	Male	Female	Drive	Transit	Downtown			Toronto		Scarborough ^F
									Core ^A	East ^B	West ^C	East ^D	West ^E	
TTC	62 ^C	63 ^C	49	66 ^C	59	62	58	73	58	62	63	70 ^{AE}	51	70 ^E
Walk	22	27 ^D	26	17	22	23	22	27	40 ^{BCDEF}	13 ^D	11	4	11	13
Drive & Park	16	17	20	15	19	14	19	10	9	17 ^A	26 ^A	15	32 ^{ABD}	22 ^A
Taxi	15	19	25 ^A	20	20	17	18	17	22 ^{DE}	23 ^{DE}	24 ^{DE}	11	10	19

Q28. How do you anticipate you would get to (INSERT RESPONSE FROM Q27a) when taking the UP Express from this point? And how do you anticipate you would get from (INSERT RESPONSE FROM Q27B) to your final destination when returning from Pearson Airport via the UP Express? Please select all that apply.

Main Method of Travel **TO/FROM** Pearson – Among those Dropping Off



Cross-Usage

INTO AIRPORT	Drive & Drop	Drive & Park	TTC	Passenger & Park	Passenger & Drop	Taxi	TAE Bus	Limousine/ Car service
	n=245	n=140	n=83	n=81	n=76	n=72	n=34*	n=28*
Drive & Drop	100	33	➡ 24	30	32	34	➡ 45	34
Drive & Park	19	100	25	29	22	24	➡ 44	➡ 42
TTC	➡ 8	15	100	22	14	➡ 44	➡ 46	33
Passenger & Park	10	17	21	100	16	17	➡ 34	25
Passenger & Drop	10	12	13	16	100	18	➡ 19	10
Taxi	10	12	➡ 38	15	17	100	➡ 38	➡ 52
Toronto Airport Express Bus	6	11	➡ 19	14	9	➡ 18	100	32
Limousine/ Car service	4	8	11	9	4	➡ 20	➡ 26	100
GO Bus	4	9	18	9	7	➡ 15	➡ 32	➡ 36
Other Transit	3	6	10	8	2	➡ 7	➡ 26	➡ 25

OUT OF AIRPORT	Drive & Drop	Drive & Park	TTC	Passenger & Park	Passenger & Drop	Taxi	TAE Bus	Limousine/ Car service
	n=217	n=141	n=92	n=78	n=91	n=56	n=24*	n=28*
Drive & Drop	100	30	20	26	26	25	➡ 37	➡ 38
Drive & Park	19	100	➡ 18	28	27	23	➡ 46	➡ 44
TTC	8	12	100	22	9	➡ 39	➡ 60	➡ 40
Passenger & Park	➡ 9	15	19	100	19	18	➡ 35	➡ 32
Passenger & Drop	➡ 11	17	➡ 9	22	100	21	➡ 41	24
Taxi	7	9	24	13	13	100	➡ 55	➡ 38
Toronto Airport Express Bus	4	8	16	11	11	24	100	➡ 37
Limousine/ Car service	5	9	12	11	7	19	➡ 42	100
GO Bus	3	8	16	13	9	19	➡ 50	➡ 30
Other Transit	4	7	17	11	8	12	➡ 45	➡ 46

Q8. Of the time(s) that you dropped a person off at the airport, how many times did you use the following methods of transportation to travel into Pearson Airport with the person you were dropping off?'

*Caution small base size.

Main Method of Travel TO/FROM Pearson – Among those Picking Up Cross-Usage



- Those who pick up passengers are more likely to rely on a single form of transit.

INTO AIRPORT	Drive & Pick Up n=223	Drive & Park n=178	TTC n=65	Passenger & Park n=54	Passenger & Pick Up n=65	Taxi n=29*	TAE Bus n=23*	Limousine/ Car service n=20*
Drive & Pick Up	100	27	19	24	23	→ 38	→ 36	26
Drive & Park	21	100	21	16	23	27	→ 36	32
TTC	6	8	100	20	15	12	→ 31	21
Passenger & Park	6	5	→ 17	100	→ 19	5	12	9
Passenger & Pick Up	7	8	16	23	100	24	17	20
Taxi	5	4	5	3	11	100	→ 21	→ 18
Toronto Airport Express Bus	4	5	11	5	6	→ 17	100	14
Limousine/ Car service	2	4	7	3	6	12	12	100
GO Bus	2	2	3	3	4	14	15	→ 20
Other Transit	1	1	2	3	2	5	6	7

OUT OF AIRPORT	Drive & Pick Up n=202	Drive & Park n=177	TTC n=53	Passenger & Park n=64	Passenger & Pick Up n=59	Taxi n=40*	Limousine/ Car service n=21*
Drive & Pick Up	100	22	→ 12	28	21	21	20
Drive & Park	19	100	17	19	20	18	26
TTC	3	5	100	19	10	9	14
Passenger & Park	9	7	23	100	17	21	26
Passenger & Pick Up	6	7	12	16	100	11	6
Taxi	4	4	7	13	7	100	12
Toronto Airport Express Bus	3	3	9	9	5	10	12
Limousine/ Car service	2	3	6	9	2	7	100
GO Bus	2	2	6	7	3	6	10
Other Transit	1	1	1	5	3	3	6

Q14. Of the time(s) that you picked someone up at the airport, how many times did you use the following methods of transportation to travel into Pearson Airport when picking someone up at the Airport?

Main Method of Travel To/From Pearson Among Those Dropping Off by Key Sub-Groups



- Older Torontonians (those 55+) are the most likely to drive and drop the passengers off curbside.
- Men are almost twice as likely as women to use the TTC as a means to get to/from the Airport when dropping off passengers.

	Total	Age				Gender	
		18-34 ^A	35-44 ^B	45-54 ^C	55+ ^D	Male	Female
Drive and drop the person off curbside	33	26	27	37	50 ^{ABC}	32	35
Drive, park and accompany into the terminal	19	20	16	20	21	19	20
TTC	14	15	17	10	13	18	10
Passenger in a car, where someone else drives and parks at the airport	9	11	8	8	5	7	11
Passenger in a car, where someone else drives and we drop the person off curbside	8	9	7	9	7	7	10
Taxi	6	7 ^D	9 ^D	7 ^D	1	7	6
Limousine/car service	3	2	5	3	2	3	3
GO Bus	3	4	3 ^D	1	--	3	2
Toronto Airport Express Bus	2	2	4 ^D	3	1	3	2
Other Transit	2	3	3	1	--	3	1

Q8. Of the time(s) that you dropped a person off at the airport, how many times did you use the following methods of transportation to travel into Pearson Airport with the person you were dropping off? (n=509). 8b. Of the time(s) that you dropped a person off at the airport, how many times did you use the following methods of transportation when leaving Pearson Airport, after you had dropped off the person? (n=509)

Main Method of Travel To/From Pearson Among Those Dropping Off by Key Sub-Groups



- Those living in the Downtown Core and Downtown East respondents are the most likely to use the TTC when dropping off passengers at Pearson compared with those living in other areas of the city.

	Total	Current Travel Mode		Region					
				Downtown			Toronto		Scarborough ^F
		Drive	Transit	Core ^A	East ^B	West ^C	East ^D	West ^E	
Drive and drop the person off curbside	33	39	8	36 ^F	31 ^F	25 ^F	29 ^F	41 ^F	19
Drive, park and accompany into the terminal	19	23	10	14	24	21	23	19	27
TTC	14	5	39	22 ^{CDEF}	22 ^{CDEF}	9	6	9	4
Passenger in a car, where someone else drives and parks at the airport	9	10	6	6	7	17 ^{ABEF}	13	8	8
Passenger in a car, where someone else drives and we drop the person off curbside	8	10	4	6	5	12	12	8	8
Taxi	6	4	10	7	3	6	7	5	7
Limousine/car service	3	2	4	3	3	3	2	1	10 ^{ABCDE}
GO Bus	3	3	7	2	3	3	3	3	6
Toronto Airport Express Bus	2	2	5	3	1	2	3	2	5
Brampton Transit	2	2	6	2	--	2	2	3	6

Q8. Of the time(s) that you dropped a person off at the airport, how many times did you use the following methods of transportation to travel into Pearson Airport with the person you were dropping off?

Q8b. Of the time(s) that you dropped a person off at the airport, how many times did you use the following methods of transportation when leaving Pearson Airport, after you had dropped off the person?

Main Method of Travel To/From Pearson Among Those Picking Up by Key Sub-Groups



- The youngest Torontonians (18-34 year olds) are the most likely to use the TTC or be a passenger in a car while another is driving.
- Interestingly, males are more likely than females to greet the passenger in the terminal, while females are more likely to be a passenger in a car while picking up someone curbside.

	Total	Age				Gender	
		18-34 ^A	35-44 ^B	45-54 ^C	55+ ^D	Male	Female
You drive and pick the person up curbside	32	32	28	36	37	31	34
You drive and park there and meet the person in the terminal building	26	18	29	33 ^A	38 ^A	31	22
A passenger in a car, where someone else drives and we pick the person up curbside	13	17 ^{BD}	8	11	7	7	17
TTC	11	15 ^{CD}	9	5	5	10	11
A passenger in a car, where someone else drives and parks at the airport..	9	10 ^D	8	8	5	9	8
Taxi	4	3	6	4	3	4	3
Limousine/car service	2	2	3	2	3	3	2
Toronto Airport Express Bus	2	2	2	--	2	2	2
GO Bus	1	1	3	--	--	2	--
Other Transit	1	1	3	--	--	2	--

Q14. Of the time(s) that you picked someone up at the airport, how many times did you use the following methods of transportation to travel into Pearson Airport when **picking someone up** at the Airport? (n=491)

Q14b. Of the time(s) that you picked someone up at the airport, how many times did you use the following methods of transportation when **leaving** Pearson Airport with the person you have picked up? (n=491)

Main Method of Travel To/From Pearson Among Those Picking Up by Key Sub-Groups



- Half of Toronto's East end residents drive and pick up the passenger(s) curbside, significantly higher than residents in other catchment areas. One-third of West-end residents report being a passenger in a car (their most frequently used mode of travel, and higher than residents in other catchment areas).

	Total	Current Travel Mode		Region					
				Downtown			Toronto		Scarborough ^F
		Drive	Transit	Core ^A	East ^B	West ^C	East ^D	West ^E	
You drive and pick the person up curbside	32	36	11	32	25	29	49 ^{ABCEF}	30	24
You drive and park there and meet the person in the terminal building	26	28	9	28	31	23	30	18	20
A passenger in a car, where someone else drives and we pick the person up curbside	13	14	18	9	6	2	6	33 ^{ABCDF}	13
TTC	11	7	36	16 ^{DE}	9	21	2	5	12
A passenger in a car, where someone else drives and parks at the airport..	9	10	11	6	7	22 ^{ABDE}	7	7	21 ^{ABDE}
Taxi	4	2	3	3	10 ^{ACDE}	2	3	3	5
Limousine/car service	2	1	3	3	5	1	2	1	-
Toronto Airport Express Bus	2	1	3	2	4	1	-	1	-
GO Bus	1	1	3	1	1	-	1	2	1
Other Transit	1	-	3	-	1	-	-	2	3

Q14. Of the time(s) that you picked someone up at the airport, how many times did you use the following methods of transportation to travel into Pearson Airport when **picking someone up** at the Airport?

Q14b. Of the time(s) that you picked someone up at the airport, how many times did you use the following methods of transportation when **leaving** Pearson Airport with the person you have picked up?