

From: Paula Edwards
Sent: Fri 7/15/2011 4:51:37 PM
Subject: FW: ARL Market Segmentation Study

Any update?
Thanks

From: Mathew Mathew
Sent: Friday, July 15, 2011 12:50 PM
To: Paula Edwards; Philip Safos; Angela Prashar
Subject: RE: ARL Market Segmentation Study

Thanks Paula,

We were hoping on Tony's support to get to employer clusters represented by the Toronto Board of Trade.
Unfortunately, haven't seen any progress on this.

Thanks,

Mathew

From: Paula Edwards
Sent: Friday, July 15, 2011 12:39 PM
To: Philip Safos; Mathew Mathew; Angela Prashar
Subject: FW: ARL Market Segmentation Study

Things to consider please.

From: Paula Edwards
Sent: Friday, July 15, 2011 12:38 PM
To: Greg Percy
Cc: Mary Proc; Kathy Haley; Gary McNeil
Subject: RE: ARL Market Segmentation Study

Good thoughts Greg. We have started an industry scan of other ARL providers. This research is happening in tandem to this.
You've also raised some other areas that we can look as well.
Thanks for the feedback.
Paula

From: Greg Percy
Sent: Friday, July 15, 2011 9:11 AM
To: Paula Edwards
Cc: Mary Proc; Kathy Haley; Gary McNeil
Subject: RE: ARL Market Segmentation Study

Paula, this looks very good. Would there also be value in selectively reaching out to related professional groups, versus individuals, such as

- the International Air Transport Association (IATA), International Air Rail Organization (IARO)
- downtown Toronto financial district employer clusters as represented by the Toronto Board of Trade or Greater Toronto Marketing Alliance (GTMA)
- global same industry players
Heathrow Express, Hong Kong Airport Express, Oslo Airport Express, Stockholm Arlanda Express
- conference planners - National Business Travel Association (NBTA) or Professional Convention Management Association (PCMA)
- tourism /hotels - Toronto Tourism, Hotel Association of Canada

These groups may see our future ARL service offering through a different lens, enough to warrant a parallel survey - same travel expectations probing, but higher level questions.

Food for thought.
Greg

From: Paula Edwards
Sent: July 15, 2011 8:04 AM
To: Dina Graser; Vasie Papadopoulos; Leslie Woo; Daniel Haufschild; Judy Knight; Michael Wolczyk; Nick Spensieri; Greg Percy; Mike Cyr; Francis Hui; Gary McNeil; William Jenkins
Cc: Mary Proc; Kathy Haley
Subject: ARL Market Segmentation Study
Importance: High

As you may be aware, various studies are underway for the ARL. Below is a brief summary of these activities:

- Branding - Strategic Communications Lead - Period: June - August'11
- Market Segmentation - Research and Business Solutions Lead - Period: June - August'11
- Ridership Forecasts - GO Planning Lead - Period: June-August'11
- Customer Experience Mapping - Research and Business Solutions Lead - Period: August - September'11

The ARL market segmentation research has started and is being carried out by our research partner Northstar Research, consultants for the study. We are now in the survey design stage, finalizing the questionnaire through feedback from key stakeholders within the organization and others such as GTAA. Broadly, this research is expected to answer the following core questions:

-
- Current travel behaviour to and from Airport
-
- Awareness of ARL
-
- Perceptions and expectations of ARL
-
- Appeal and likelihood to use
-
- Barriers to use
-
- Concept evaluation to help with design elements and configurations – Amenities desired/expected, number of luggage carried, etc.

Exclusion per Committee Direction

High-level segmentation and assessment of potential targets

The research would target 4 key potential target segments as below:

**Target
Sample
Methodology
Target Dates**

Business Travelers 2075

Online survey, respondents sourced from online panel in GTHA + phone-to-web recruit + distribution of survey postcards that direct people to a URL for taking the survey.

Geographic coverage for sample catchment area defined by the Ridership Forecast study + York, Peel, Halton and Hamilton

Late July

Non-business Travelers 2075

Commuters/Employees of GTAA and other tenants at Pearson Airport 500

Online survey, Email Blast to employees of GTAA, Air Canada, West Jet etc. Distribution of invitation cards with survey link among team leaders of staff without access to PCs

Non-GTHA Travelers 500

Passenger intercept surveys at Terminals 1 and 3 August 5th, 6th, 7th, 8th, 9th, 15th and 17th

Among other things, this survey is expected to provide us with feedback for terminal and in-coach facilities and services, amenities desired and can indirectly provide us inputs for deciding on certain design elements such as luggage space (Numbers of carry-on luggage and checked-in luggage which can help determine the luggage space/rack size required). However, since we have to limit the length of the survey to a reasonable time limit of under 20 minutes, the survey will not attempt to ask details on design elements such as say, fabric type, leather etc for seats, colours for seats, interior etc. Also since

ridership forecasts have been determined by Planning, the market segmentation will not cover short and long-term demand estimations from the different target groups identified above.

Attached here please find two documents: 1) The Research Methodology to give you an overview of the sampling and approach for the study and 2) The Draft Online Survey for Business and Non-business travelers within the catchment areas of interest (An extract of this would be used for the intercept survey at the airport).

GTAA needs a two week window to get Police/security clearances and issue a survey permit for conducting the survey and will require the survey questionnaire by the afternoon of July 20th so that we can conduct the survey on the dates specified.

As a key stakeholder in this project, your feedback would add much value to this research. So please review the attached questionnaire and provide Mathew Mathew (mathew.mathew@metrolinx.com) of Research and Business Solutions directly with your comments by 11 AM on Wednesday, 20th July.

I would greatly appreciate your prompt reply.

Regards,

Paula

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