

From: Paula Edwards
Sent: Wed 7/20/2011 12:46:38 PM
Subject: Fw: ARL Market Segmentation Study

Fyi

Sent from my BlackBerry

From: Michael Wolczyk
To: Daniel Haufschild; Paula Edwards; Mathew Mathew
Cc: Mary Proc; Kathy Haley; Dina Graser; Vasie Papadopoulos; Leslie Woo; Judy Knight; Nick Spensieri; Greg Percy; Mike Cyr; Francis Hui; Gary McNeil; William Jenkins
Sent: Wed Jul 20 07:24:24 2011
Subject: RE: ARL Market Segmentation Study

Really good comments Daniel. I had a lot of similar ones.

I was thrown by the title (Market Segmentation Study). It seems to be more of a usage and pricing questionnaire than segmentation. It doesn't seem to try to break down business, employment and recreational travellers into sub-segments to identify factors important to that particular sub-segment. It tends to focus on what one currently does, not how the ARL might change how and when one travels. For example, somebody who works downtown and is leaving Toronto for a business trip probably wouldn't go to the office for the morning and catch an early afternoon flight today, but might when the ARL is available.

I think separate questionnaires are required for Toronto area residents and for visitors to Toronto. Each one should drill down on aspects of the trip, either from home/work to/from airport or airport to/from final destination. Somebody unfamiliar with Toronto is going to have very different considerations. For example, getting from Union Station to a business meeting 2 blocks from Union is a huge consideration for someone who has never been to Toronto.

Sorry to say this, but I don't think the questionnaire as-is is going to give the quality of information that we need.

From: Daniel Haufschild
Sent: Tuesday, July 19, 2011 11:17 PM
To: Paula Edwards; Dina Graser; Vasie Papadopoulos; Leslie Woo; Judy Knight; Michael Wolczyk; Nick Spensieri; Greg Percy; Mike Cyr; Francis Hui; Gary McNeil; William Jenkins
Cc: Mary Proc; Kathy Haley
Subject: RE: ARL Market Segmentation Study

Paula,

Thanks again for the opportunity to review the survey.

In general comments relate to sharpening of language to avoid ambiguity for respondents. The other main comment is that you are asking people for quite a lot of information – for example in Q19 the percentage of times you left at each of 5 time bands over the past year. I am not sure I could answer this even for last 3 months. Is this level of information needed?

The content is similar to what was asked in the 2009 survey, so I am trying fully understand the intended use of the survey, which I understand is more marketing focused. From the length of section 4, it appears how much people will pay seems a strong focus.

Exclusion per Committee Direction

Exclusion per Committee Direction

You might want to consider some more qualitative questions around what would incentivize people to use the service, i.e.

- are they more/less likely to use it when it's snowing?
- Will they use it once just to try it out and if its good tell all their friends?
- Would being sold a ticket on the plane like some other operators do be appealing?
- Is it something they would only use when travelling alone? Or with family or for business etc etc

Specific comments below:

1. The Methodology appears to be a combination of online survey and intercept which I think is face to face. The interview length seems relatively long at 61 questions for on-line. What is the estimated survey duration? 61 questions might be ok if face to face as people cannot get away from you and they are captive in the airport – however on-line it might be more tricky.

a. How will respondents be incentivized to take part on-line?

b. How will “drop-outs” be minimized. You might want to consider reorganising the questions a bit to have the most important ones up front (i.e. perceptions of ARL, appeal, pricing exercise etc), then follow up with the more contextual information.

c. If you are using a combination of methodologies for recruitment how will methodological biases be addressed?

2. Questions 16 through 29 are fairly repetitive – there may be a more interesting way to formulate these in order to minimize drop-outs through these initial sections
3. Q14 number of bags – is this for the individual, the whole group, what if people are travelling with small children, should you count their bags?
4. Q15 group size – suggest adding a question after this to determine how many people were actually flying to estimate how many meters/greeters in the group
5. Q17 primary access mode – what does primary mean here? The one you used last time, the one you used most of the time in the past 12 months, your favourite? Suggest making this clearer.
6. Q17 primary access mode – suggest clarifying when this mode was used to pick up any seasonal variation?

Exclusion per Committee Direction

9. Q19/Q20 time/day left for airport – see general comment above, this is quite a lot to recall for the past 12 months
10. Q24 primary mode for travel from airport – see comment to Q17 above

Exclusion per Committee Direction

12. Q26/27 time/day left for home /office – see comments above for Q19/Q20

Exclusion per Committee Direction

14. Pre Q33, the text says between 5am and 2am. We are assuming 5am to 1am for the forecasting
15. Pre Q33 what does special luggage capacity mean. I would be clearer in the language here. Luggage racks might be better.
16. Q35 ARL descriptions. I would suggest making it clear that this is a description that applies to the individual, just in-case you get some altruistic responses.
17. Section 4 – I would make it clear in this section what circumstances you are travelling in. In other words are you travelling on your own or in the group referred to in Q15. This may have a bearing on how people respond.
18. Q47b through Q47e and Q49b/49c access/egress modes – this is a little repetitive, perhaps formulate as a grid to ease the burden on respondents
19. End of questionnaire – I would include an open response box for all other comments either about this survey or the ARL

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

Paula Edwards

Director, Customer Care

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