

To: Dina Graser[Dina.Graser@metrolinx.com]
From: Mathew Mathew
Sent: Wed 7/20/2011 5:38:49 PM
Subject: RE: ARL Market Segmentation Study
Toronto Model Zones.kmz

Dina,

Residents around the Georgetown line will be targeted through the core survey of 4150 online respondents who will be targeted from the area defined in the map as the catchment zone. The attached map (google earth map) shows the target area from where we will be sourcing the respondents.

While the survey will be online, sourcing respondents from an online Panel who live in this target area (this is not GO's E panel), we will supplement with telephone calls directing people to the website and distribution of survey invitation cards with links at certain locations where we don't get sufficient response.

Thanks,

Mathew

From: Dina Graser
Sent: Wednesday, July 20, 2011 12:21 PM
To: Mathew Mathew
Subject: RE: ARL Market Segmentation Study

Sorry, I'm confused by your last note and the map. I'm not asking about employees - I'm asking about residents who live around the airport or along the Georgetown line...

From: Mathew Mathew
Sent: July 20, 2011 12:08 PM
To: Dina Graser; Angela Prashar
Cc: Mary Proc; Kathy Haley; Paula Edwards; Philip Safos
Subject: RE: ARL Market Segmentation Study

Thank you Dina for the feedback.

There is a general feeling that the questionnaire is lengthy. I had a discussion with the consultant earlier today with a view to reduce the length of the questionnaire by combining certain questions, deleting certain questions for which we already have information on and asking some questions in a grid format which would eliminate similar questions being asked for different options.

The net result is that we would be able to reduce at least 20 questions or so and thus keep it to around 40 odd questions. The price ladder approach will ask only 2 or 3 options based on selection. The core survey would target the catchment area defined in the forecasting study done by Daniel's group (see

attachment).

Employees would be targeted through a different survey.

Thanks,

Mathew

From: Dina Graser
Sent: Wednesday, July 20, 2011 11:42 AM
To: Angela Prashar
Cc: Mary Proc; Kathy Haley; Mathew Mathew; Paula Edwards
Subject: RE: ARL Market Segmentation Study

Sorry I'm a little late with my feedback. This is certainly thorough.

A few general comments.

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this is very long. I would be concerned about completion rates. - Taking care of this.

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Exclusion per Committee Direction

Exclusion per Committee Direction

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Will people really remember if they travelled on a Monday or a Thursday six months ago? How crucial is this information? This can be removed

-

Are we going to be polling residents who near the airport area or along the Georgetown line at all, or only those who work at or near the airport? Pls see map. Employees will be targeted through a different survey

Thanks,

Dina

From: Angela Prashar

Sent: July 19, 2011 4:43 PM

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; Mathew Mathew; Paula Edwards

Subject: FW: ARL Market Segmentation Study

Importance: High

Thank you to those who have offered your feedback to Mathew

For those who haven't had an opportunity to respond, please note that we require your feedback by tomorrow at 11am (Wednesday July 20th)

Much appreciated!

Regards,

Angela Prashar

Manager, Research and Business Solutions

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"Working together with our stakeholders to provide value added insights and solutions that drive business transformation to enhance the customer experience"

From: Paula Edwards

Sent: Friday, 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 <<mailto: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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