

To: Angela[Prashar]
From: Dina Graser
Sent: Wed 7/20/2011 3:41:00 PM
Subject: RE: ARL Market Segmentation Study

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

A few general comments.

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

Exclusion per Committee Direction

Exclusion per Committee Direction

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

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

e: angela.prashar@metrolinx.com <<mailto:angela.prashar@metrolinx.com>>

t: 416.869.3600 ext 5512
c: 416.949.0151
PIN: 221F3557
Fax: 416.869.3615

"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

Paula Edwards
Director, Customer Care
Metrolinx / GO Transit
416-869-3600 Ext 5503
paula.edwards@gotransit.com