

Cc: Mary Proc; Kathy Haley
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
From: Daniel Haufschild
Sent: Tue 7/19/2011 2:15:36 AM
Subject: RE: ARL Market Segmentation Study

Thanks Paula, good to see the sample size has increased.

As a note, the ridership forecasts being done by GO Planning **Exclusion per Committee Direction**
Exclusion per Committee Direction based on competitiveness of overall travel time **Exclusion per Committee Direction** against other travel options. **Exclusion per Committee Direction** we should have good reference points.

I would like to examine how this survey and questions could be used to update our ridership model, the turnaround time is tight, but I will see what we can do.

Daniel

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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