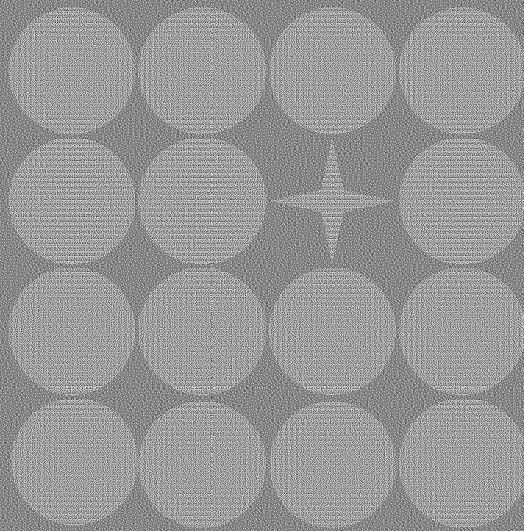




METROLINX
LINKING PEOPLE TO PLACES • ON Y VA

An agency of the Government of Ontario

ARL Market Assessment --Final Report--

November 7, 2011

 **NORTH STAR**
research partners

BACKGROUND & OBJECTIVES

Background/Research Objectives

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In 2015, Metrolinx will commence operations on the Air Rail Link, a direct rail connection between Pearson Airport and downtown Toronto Union Station, with stops at Bloor and Weston GO stations.

While Metrolinx has already undertaken a ridership forecast study, the objectives of this research are to:

- TM Understand the overall appeal and potential uptake of the ARL;
- TM Measure key perceptions of the ARL among key target segments;
- TM **Exclusion per Committee Direction**
- TM Ascertain levels of appeal of potential additional amenities;
- TM Finally, understand current transportation methods to and from Pearson Airport and the potential impact of the ARL on this competitive set.



Study Design

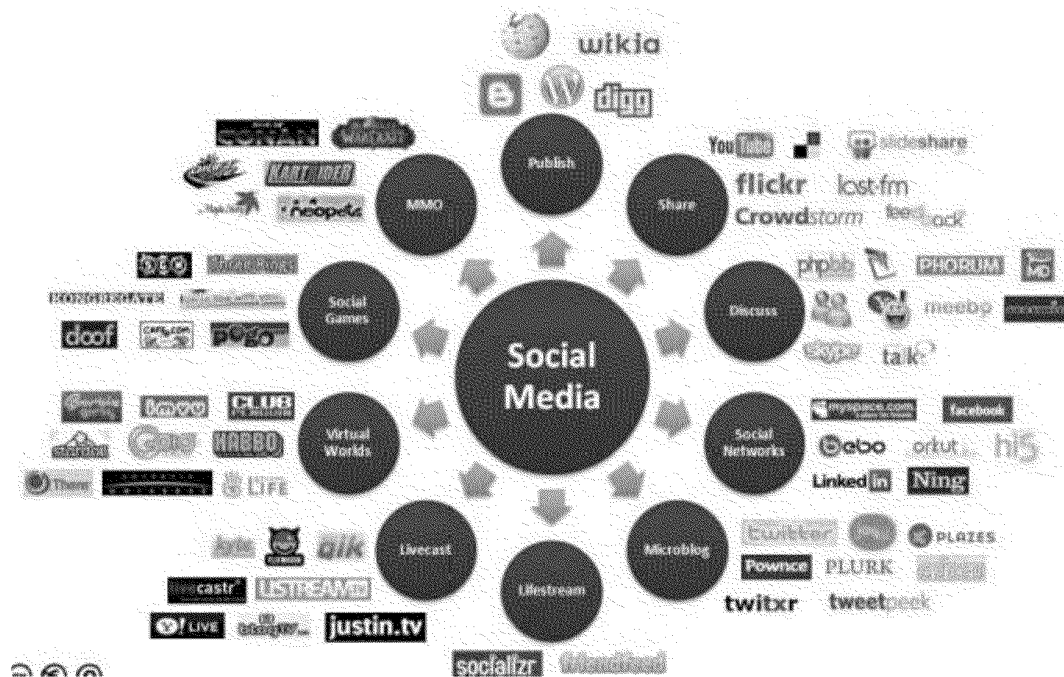
As the potential ARL ridership consists of a number of different populations, we leveraged a three-prong approach to capture the interest and perceptions of all potential riders:

- ™ GTHA Residents: an on-line study was conducted among those who live and/or work in the GTHA. We primarily leveraged on-line panels to complete this phase, although we also incorporated other recruitment methods, such as: social media, passing out invitation post-cards, and partnering with Oxford Properties and The Toronto Board of Trade. In order to qualify, respondents either had to have flown out of Pearson Airport in the past 12 months or plan on doing so in the next 12 months (incidence = 60%).
- ™ Visitors to Toronto: we conducted intercept interviews in Pearson International Airport among non-Ontario residents who were traveling to/from Toronto for either business or leisure purposes. Those on connecting flights were excluded. Quotas were set based on terminal and flight type (international, US-bound, domestic) to ensure the sample was representative of airport passenger traffic. These figures were provided to Northstar by the GTAA.
- ™ Pearson Employees: as some who work at Pearson may use the ARL to commute to/from work, this segment was also included. E-mails and flyers were sent around to Pearson employees to participate in this survey, which was available on-line.

All fieldwork was conducted in August, 2011.



Using Alternative Recruitment Tools



In addition to standard recruitment methods, we also leveraged social media sites to bolster the number of completions in the GTHA survey.

Members of Northstar and Metrolinx staff sent out 'invitations' via LinkedIn, Twitter, Facebook and Google+.

Forty-nine completions were attained via social media.

Furthermore, we also leveraged Metrolinx's partnership with Oxford Properties and The Toronto Board of Trade, who sent out additional e-mails and posted materials inviting their members to participate in this survey. This methodology netted an additional 38 completions.



Business vs. Non-Business Travellers



Furthermore, as the experience can differ significantly based on purpose of travel, we further segmented the data by business vs. non-business travelers.

For the survey among GTHA residents, those who travel 30% or more of the time for business purposes were defined as 'business travellers,' and all questions were in reference to their travel for business. Those who travel less than 30% of the time for business purposes were defined as 'non-business' travellers and again, all questions were in reference to their travel for non-business purposes.



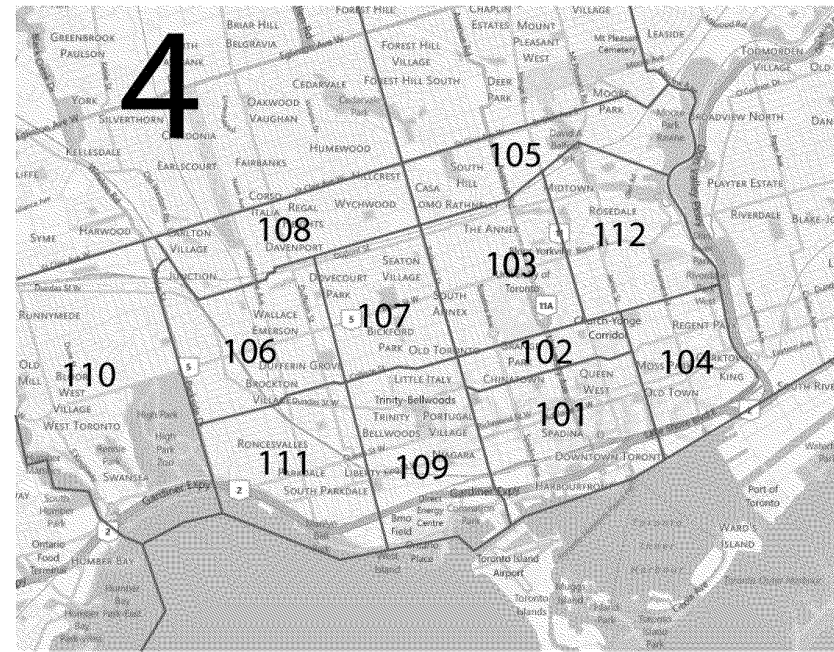
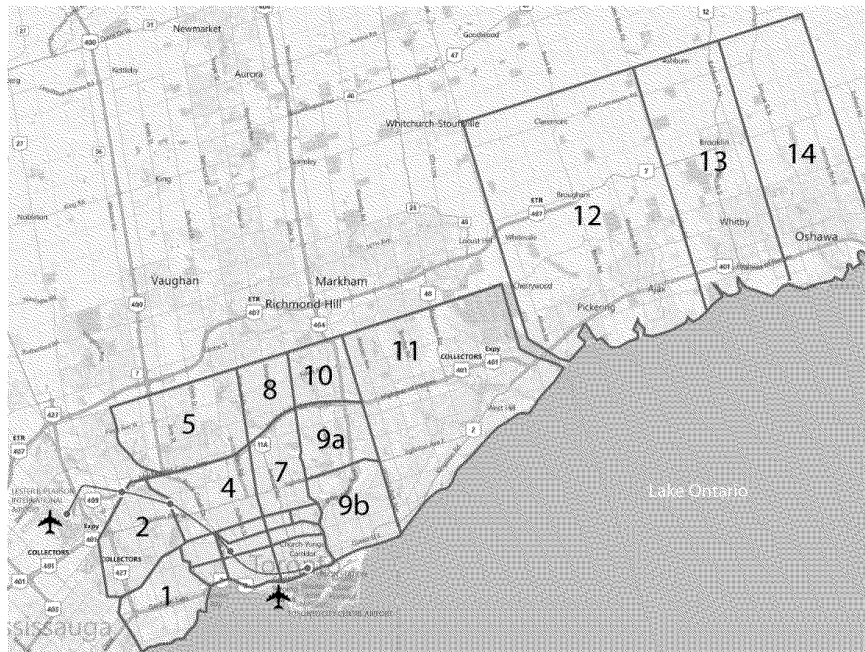
For the Pearson Intercept phase, to qualify as a business traveller, the respondent had to travel 50% or more of the time for business purposes. While this was the cut-off point to qualify as a business traveller, quotas ensured that business travellers accounted for only 30% of the total sample composition.

This 70/30 split between non-business and business travel is based on past 3 year travel data, supplied by the GTAA. Note: actual usage split will be wholly dependent on a number of factors, including pricing and marketing elements. At this stage, there is nothing to suggest that one segment would be more likely to use the ARL than another.



Catchment Areas

For the survey among GTHA residents, respondents were shown the following maps and then assigned to catchment areas based on where they live and/or work. These catchment areas mirror those used to determine the ARL ridership forecast. Furthermore, catchment areas were prioritized based on this ridership forecast.



As Metrolinx will never target individual catchment areas for marketing purposes, we have combined a number of catchment areas to create the following zones: Downtown Core (101+102), Downtown West (106-111), Downtown East (103-105 + 112), Toronto West (1+2+4+5), Toronto East (7-10), Scarborough (11), Pickering/Whitby/Oshawa (12-14), plus York Region and the West (Halton/Hamilton, etc). By combining these catchment areas, we also strengthen the analytic rigour with which we examine the results within each region.



Sample: GTHA Residents Survey

A total of 4,150 interviews were completed among residents of the GTHA.

Data were weighted based on catchment area (to match the ridership forecast) and to match business vs. non-business travel (30% and 70%, accordingly) based on guidance provided by the GTAA. Below are the **weighted completions**, and all results are based on weighted data.

Area	Catchment Area Grouping	Weighted Business Traveler Completions	Weighted Non-Business Traveler Completions	TOTAL
Downtown Core	101+102	195	455	650
Downtown West	106+107+108+109+110+111	270	630	900
Downtown East	103+105+112+104	180	420	600
Toronto West	1+2+4+5	165	385	550
Toronto East	7+8+9a+9b+10	225	525	750
Scarborough	11	30	70	100
Pickering/Whitby/Oshawa	12+13+14	90	210	300
York		45	105	150
West (Halton/ Hamilton, etc)		45	105	150
TOTAL		1245	2905	4150



Sample: Pearson Intercept Survey

A total of 829 interviews were completed in the Pearson Intercept phase of the project, broken out as follows:

Country of Residence	Weighted Business Traveler Completions	Weighted Non-Business Traveler Completions	TOTAL
Another Canadian Province	122	203	325
United States	106	151	257
Another Country	24	223	247
TOTAL	252	577	829

And by terminal:

Terminal	Weighted Business Traveler Completions	Weighted Non-Business Traveler Completions	TOTAL
Terminal 1	184	316	500
Terminal 3	68	261	329
TOTAL	252	577	829

All results are based on weighted data.



Sample: Pearson Employee Survey

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A total of 323 interviews were completed among employees of Pearson Airport. E-mails were sent to the staff requesting participation. There were no requirements to qualify for the survey. Results have not been weighted.



Reporting Perspective

Circles and squares have been used to distinguish results which are statistically or directionally significant.

 = findings which are statistically higher (calculated at a 95% confidence level) between sub-groups.

 = findings which are statistically lower between sub-groups.

 = highlights findings of interest

Select margins of error at 95% confidence:

n = 4,150 $\pm 1.52\%$

n = 2,000 $\pm 2.19\%$

n = 1,000 $\pm 3.10\%$

n = 500 $\pm 4.38\%$

n = 250 $\pm 6.20\%$

n = 150 $\pm 8.00\%$

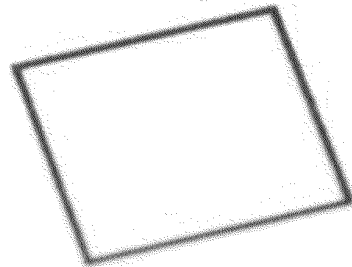
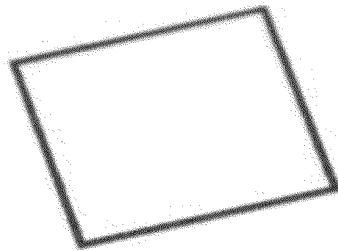
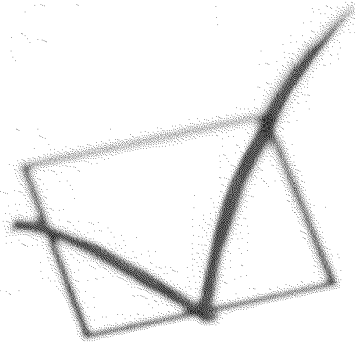


KEY FINDINGS



Profile of a Traveller

Sample Demographics: At A Glance

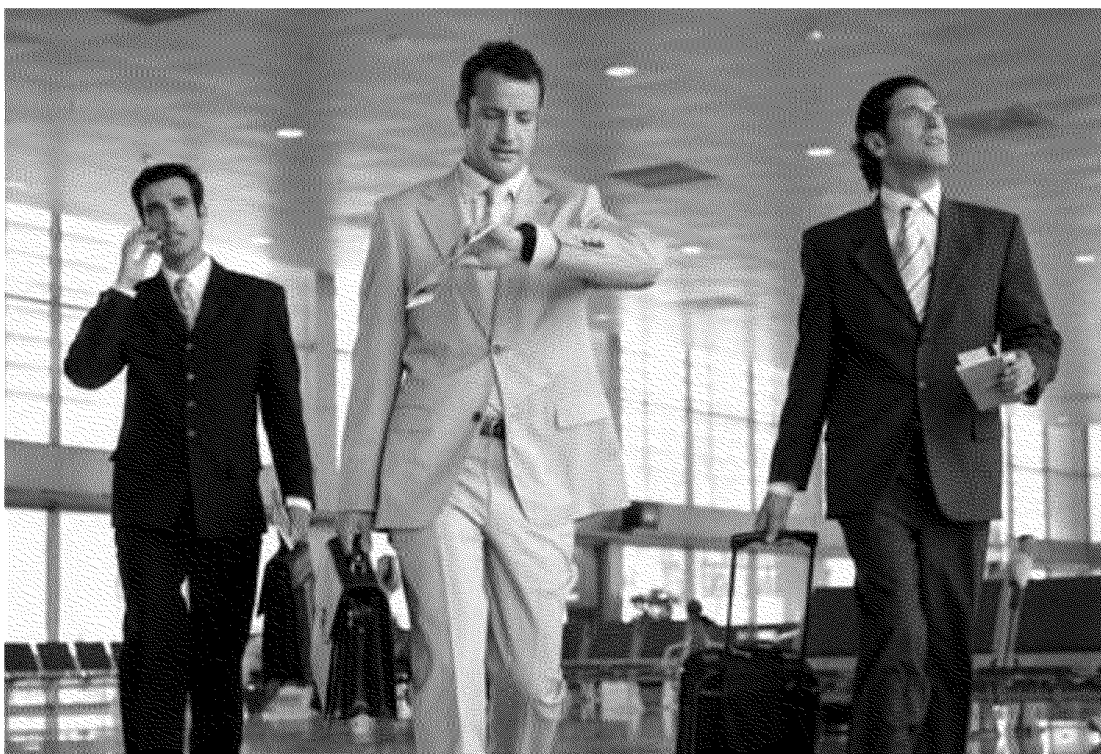


Average Age: 40 for travellers, 43 for Pearson Employees

Male/Female: 46/54 for GTHA residents, 59/41 for Pearson Intercepts, and 73/27 for Pearson Employees

GTHA resident additional demos: 53% are married, and 23% have kids

Pearson Intercepts: Fairly evenly split between non-Ontario, US, and International



Business vs. Non-Business Travellers

Business Travellers are more likely to be male

Business travellers have flown out of Pearson an average of 5-6 times last year vs. about 2 times for non-business travellers

In the GTHA, business travellers are more likely to be married, earn higher incomes, and have children vs. non-business travellers

Business travellers from the Pearson Intercepts are more likely to be travelling from other provinces or from the US compared with non-business travellers, who are more likely to be travelling from international destinations

Travel Behaviour



Average # times flown from Pearson in P12M:
3 times

Luggage: 69% of GTHA residents check in 1 standard sized bag, and 75% carry on 1 piece of luggage; non-Ontario residents tend to travel lighter, checking in fewer bags.

Seasonality: Fairly equally split across the year

Travel destination for GTHA residents: Business travellers tend to travel within Canada and to the US, whereas the majority (75%) of non-business travellers fly to International locations (including the US)

Travel companions: Among GTHA residents, 59% of business travellers travel on their own, and 76% of non-business travellers are joined by a companion. For non-Ontario residents, 73% of business travellers travel solo, while over half (53%) of non-business travellers have at least one companion traveling with them.

Airport usage: While only a minority of travellers fly into and out of Billy Bishop Airport (10% of business and 7% of non-business travellers), interestingly, those who leave for the airport from work are more likely to use the Island Airport compared with those who leave from home (14% vs. 8%).



Current Travel to & from the Airport

Summary

Over 90% of GTHA residents leave from, and return to, their home when travelling.

This has enormous implications for the ARL, both in terms of communications, as well as in terms of logistics.





Summary *(continued)*

Most travellers (about 80%) use the same transportation method to get to and from the airport.

GTHA residents generally get to and from the airport via: someone else driving, limo/car service, or taxi. On the other hand, nearly half (48%) of non-Ontario residents have someone drop them off/pick them up at Pearson, and 13% rent a car. And over two-thirds (68%) of Pearson employees drive themselves and park at the airport.

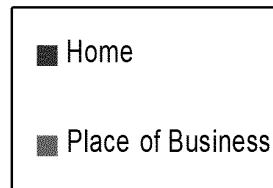
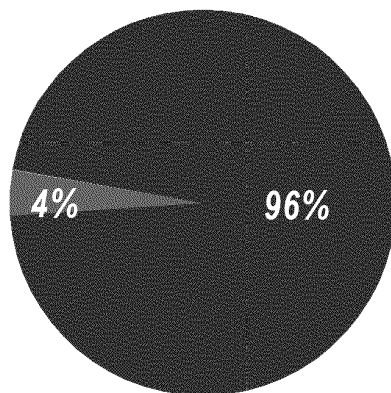
On average, a GTHA resident will spend slightly more than \$40 on transportation one-way to the airport (business travellers are closer to \$50, whereas non-business pay slightly below \$40). Not surprisingly, three-quarters of business travellers are reimbursed for their travel expenses.

While speed and convenience are the top reasons for selecting specific transportation methods (inexpensive is mentioned primarily for public transportation options and 'someone else driving me'), GTHA residents most dislike traffic jams. The expense is also mentioned for taxi and limousines, and the amount of time is a concern for public transportation methods.

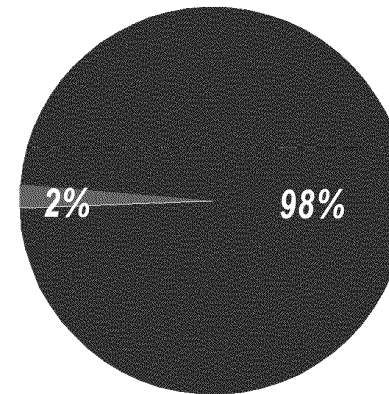
Pearson Departure and Arrival Points - GTHA Residents

‰ Virtually all travellers (95%) both depart from, and return to, their home when travelling by air.

Point of Departure to Pearson



Point of Arrival from Pearson



95%
of the time the
departure/arrival
point is the same

Business Travellers who leave from home: 91%

Non-Business Travellers who leave from home: 98%

Business Travellers who return to home: 95%

Non-Business Travellers who return to home: 99%



Q8. When traveling into Pearson Airport for (business/non-business) travel, do you mainly leave from your home or from your place of business?

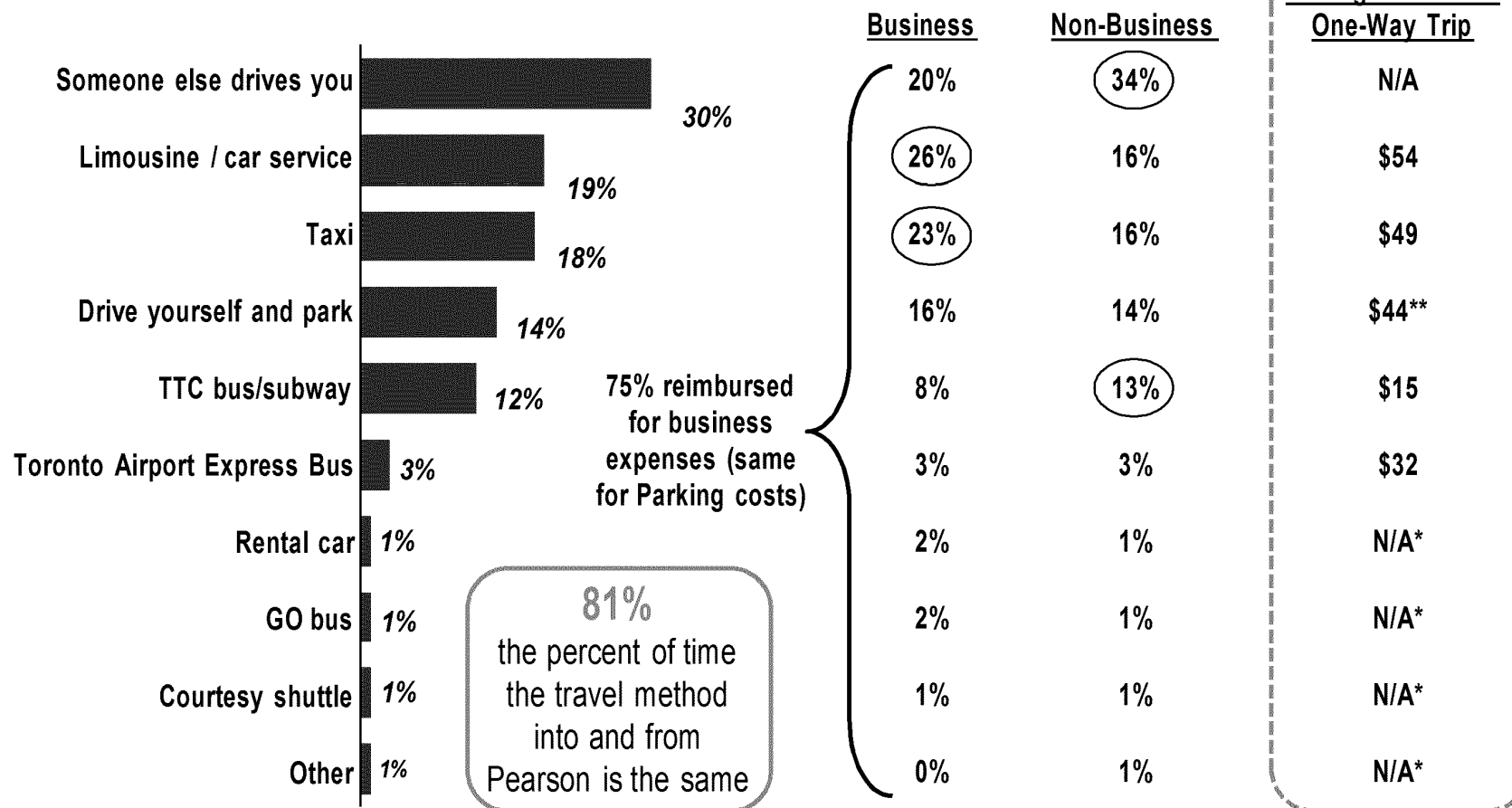
Q9. When traveling out of Pearson Airport for (business/non-business) travel, do you mainly return to your home or to your place of business?

Main Method of Travel To/From Pearson: GTHA Residents

‰ Getting picked up and dropped off by someone else is the most common travel method among GTHA residents, particularly among Non-Business travellers; taking a limo or taxi are the next most popular methods (and the most expensive), especially among Business travellers.

Main Method of Travel To/From Pearson

Base: GTHA Residents



Q10. What is the main way that you travel into Pearson Airport? And what is the main way you travel out of Pearson Airport?
 Q63. How much do you typically pay for your transportation into Pearson Airport?
 Q65. How much do you typically pay for your transportation out of Pearson Airport?

* Sample size too small to analyze

** Average cost of parking. Does not include other costs such as gas or vehicle expenses.

Main Method of Travel To/From Pearson – Among GTHA Residents (By Key Sub-Group)

‰ Younger travellers, females, and those living farthest from downtown are the most likely to have someone else drive them to or pick them up from Pearson.

	Age				Gender	
	18-34	35-44	45-54	55+	Male	Female
Someone else drove you	37	26	25	27	25	34
Limousine / car service	12	18	27	30	21	18
Taxi	19	23	16	12	18	18
Drove yourself and parked	12	16	17	17	17	12
TTC bus/subway	15	11	9	8	13	11

	Region								
	Downtown Core	Downtown West	Downtown East	Toronto West	Toronto East	Scar- borough	Pickering etc	York	West
Someone else drove you	25	26	25	39	30	44	37	36	41
Limousine / car service	21	21	19	14	23	10	18	18	18
Taxi	21	23	19	21	17	10	4	15	13
Drove yourself and parked	13	8	11	131	62	43	5	24	22
TTC bus/subway	13	18	19	9961				3	2



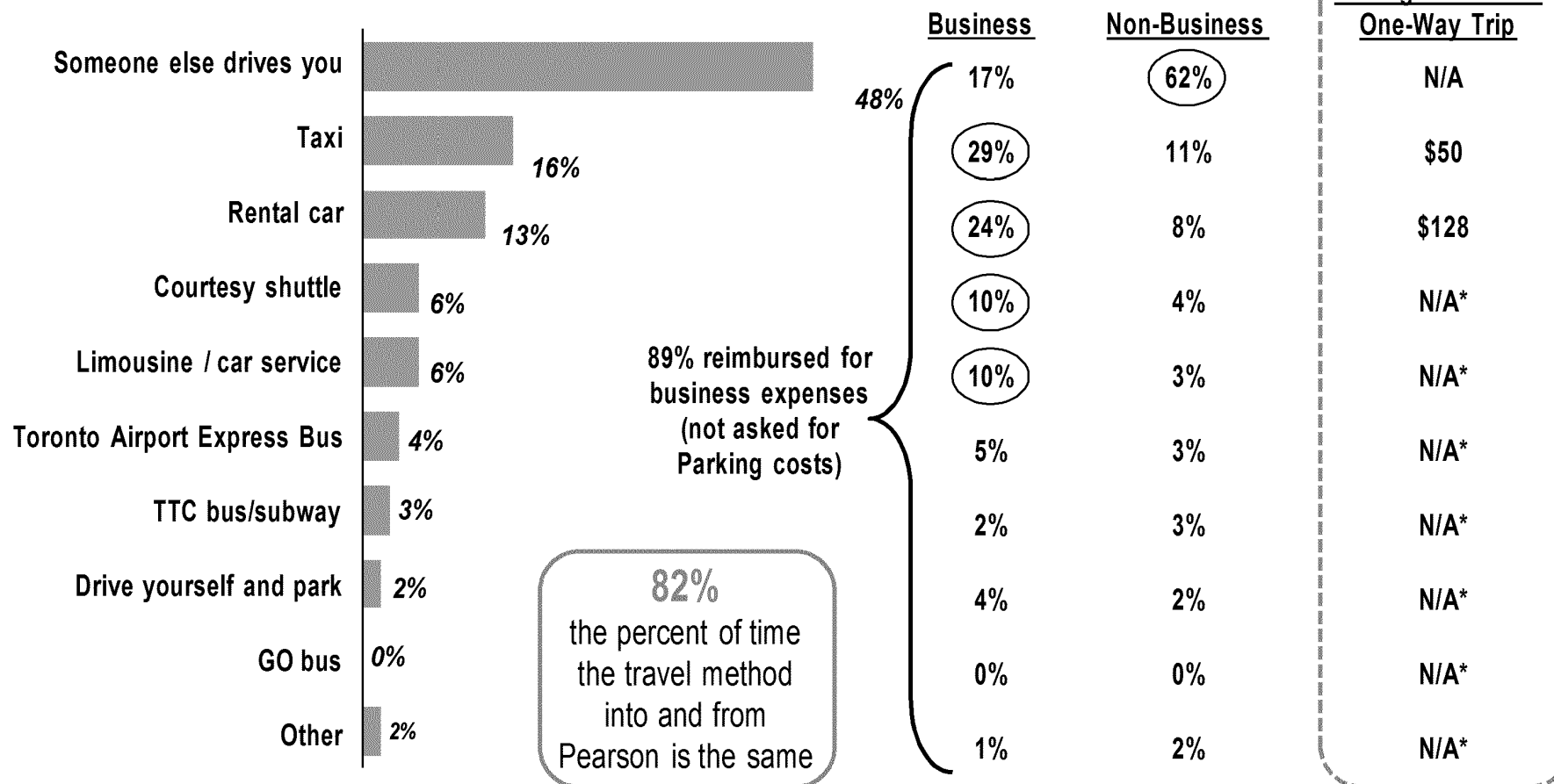
Q10. What is the main way that you travel into Pearson Airport? And what is the main way you travel out of Pearson Airport?

Main Method of Travel To/From Pearson: Pearson Intercepts

- ‰ Among non-Ontario residents, nearly two-thirds (62%) of Non-Business travellers are picked up or dropped of at Pearson by someone else; Business travellers most likely to take either a taxi (29%) or limo/car service (24%).
- ‰ A rental car was by far the most expensive option (\$128.10), followed by a taxi (\$50.05).

Main Method of Travel To/From Pearson

Base: Pearson Intercepts



- Q10. What is the main way that you travel into Pearson Airport? And what is the main way you travel out of Pearson Airport?
- Q63. How much do you typically pay for your transportation into Pearson Airport?
- Q65. How much do you typically pay for your transportation out of Pearson Airport?

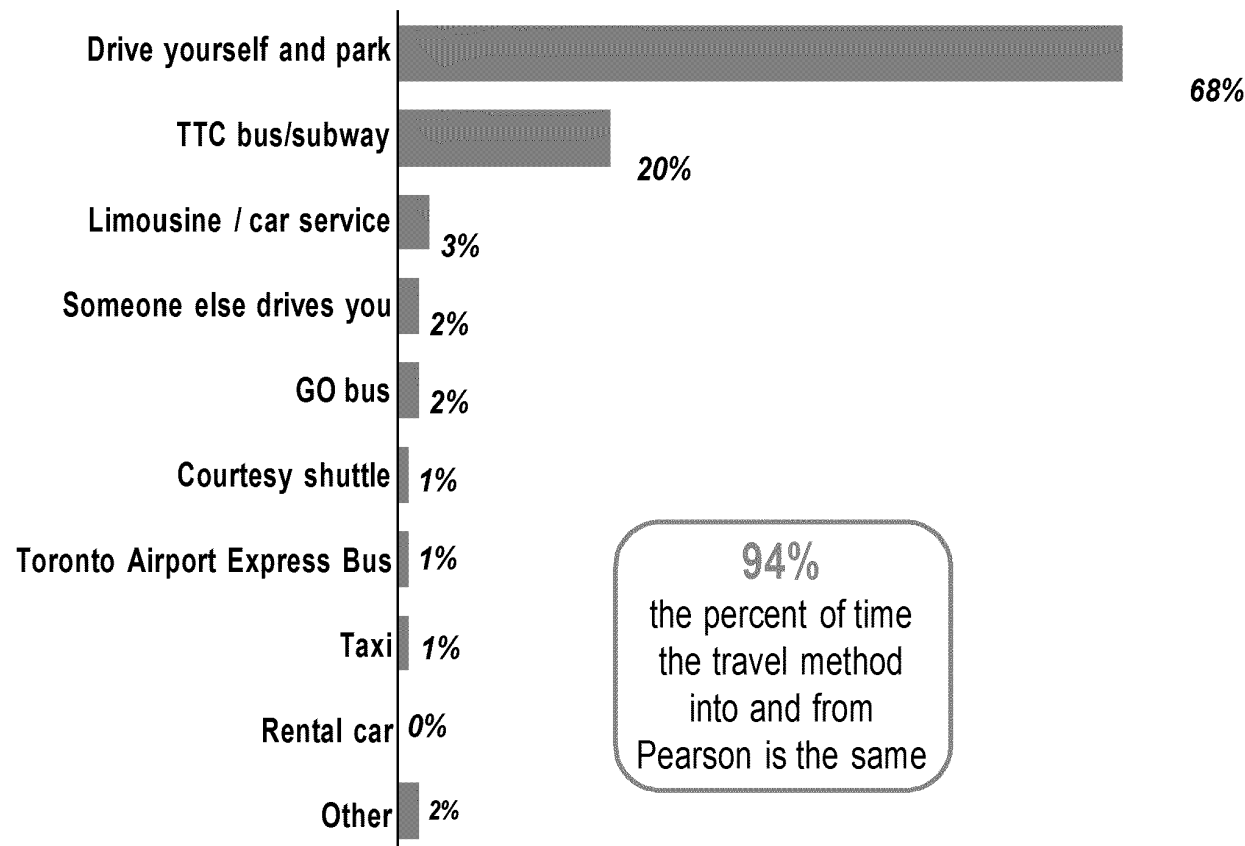
* Sample size too small to analyze

Main Method of Travel To/From Pearson: Pearson Employees

- Over two-thirds (68%) of Employees drive themselves to and from Pearson; the majority of remaining Employees use the TTC to travel to and from work.
- Nearly all Employees (94%) use the same method of transportation to get to and from Pearson.

Main Method of Travel To/From Pearson

Base: Pearson Employees



Q10. What is the main way that you travel into Pearson Airport? And what is the main way you travel out of Pearson Airport?

Amount Spent on Transportation – Among Employees

‰ The TTC provides the least expensive method of travel per week for Pearson Employees (\$26.90), followed by gas expenses of driving oneself (\$47.30) and Other methods (\$62.10).

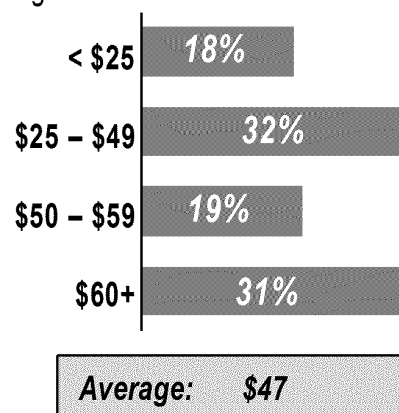
Weekly Amount Spent on Transportation To/From Pearson

Base: Among those not driving self or having someone else drive them to/from Pearson

		Primary Transportation Method Into Pearson	
		TTC	All Other Methods
<i>Employee</i>	\$39	\$27	\$62

Weekly Amount Spent on Gas Driving To/From Pearson

Base: Among those who drive themselves to/from Pearson



Q63a. How much do you typically pay on a weekly basis for your transportation into and out of Pearson Airport for work?

Q63b. How much money do you typically spend on gas, on a weekly basis, to drive into and out of Pearson for work?

Top Reasons for Choosing Transportation Method

‰ Convenience ('drops me off/picks me up right at the terminal,' 'picks me up at the exact time/location,' and 'quickest') tend to be the top reasons for selecting a transportation method, along with 'inexpensive.'

Reasons for Choosing Primary Method of Transportation Into Pearson (% Top 3 Reasons)

Base: GTHA Residents

Someone else drove (30%)



Inexpensive: 41%
Drops me off right at the terminal: 41%
Quickest: 39%

Limo/Car Service (19%)



Picks me up at exact time/location: 60%
Drops me off right at the terminal: 47%
Quickest: 38%

Taxi (18%)



Picks me up at exact time/location: 46%
Drops me off right at the terminal: 46%
Quickest: 42%

Drive Themselves (14%)



Quickest: 53%
No hassle: 28%
Inexpensive: 23%

TTC (12%)



Inexpensive: 80%
Convenient location: 47%
Drops me off right at the terminal: 44%

Airport Express Bus (3%)



Convenient location: 46%
Drops me off right at the terminal: 44%
Inexpensive: 41%

Q67. People prefer specific methods of transportation for different reasons. Below are a number of different reasons that could be used to describe why a person would choose one type of transportation over another to get to Pearson Airport. Please rank, from the list below, the top 3 reasons you choose (INSERT DTS) as your primary method of transportation into (IF Q10A=Q10B, ADD: or out of) Pearson Airport. Please use the following ranking: 1 is the top reason you choose this method, 2 is the second reason you choose this transportation, and 3 is the third reason.

Top Reasons for Disliking Transportation Method

‰ Traffic jams is one of the top dislikes for all transportation methods selected. For taxi and car services, the expense is also mentioned to a fairly high degree.

Reasons for Disliking Primary Method of Transportation Into Pearson (% Top 3 Reasons)

Base: GTHA Residents

Someone else drove (30%)



Subject to traffic jams: 44%
Too expensive: 22%
Takes too much time: 21%

Limo/Car Service (19%)



Subject to traffic jams: 64%
Too expensive: 63%
Takes too much time: 16%

Taxi (18%)



Too expensive: 73%
Subject to traffic jams: 66%
Rude personnel: 17%

Drive Themselves (14%)



Subject to traffic jams: 66%
Too expensive: 35%
Cannot use phone/laptop: 24%

TTC (12%)



Too crowded/congested: 48%
Takes too much time: 43%
Subject to traffic jams: 41%

Airport Express Bus (3%)



Subject to traffic jams: 57%
Takes too much time: 38%
Too expensive: 34%

Q68/Q70: Not every transportation method is perfect. Below are some things that people have mentioned they dislike about the transportation method they use to get to Pearson Airport. Please rank, from the list below, the top 3 aspects that you dislike about [INSERT PRIMARY TRANSPORTATION] into / out of Pearson Airport. Please use the following ranking: 1 is the #1 aspect you dislike about this transportation method, 2 is the second-most reason you dislike this method, and 3 is the #3 reason you dislike this transportation method.

Top Reasons for Choosing / Disliking Transportation Method

- %o Employees driving themselves to/from Pearson like that it is quick, but dislike its susceptibility to traffic jams.
- %o Employees taking the TTC to/from Pearson do so for its low cost, but dislike the crowds and the time it takes.

Reasons for Choosing / Disliking Primary Method of Transportation Into Pearson (% Top 3 Reasons)

Base: Employees

Drive Themselves (68%)



Reasons for Choosing:

- Quickest: 62%
- No other alternative: 37%
- Goes non-stop to the airport: 32%

Reasons for Dislike:

- Subject to traffic jams: 72%
- Too expensive: 39%
- Takes too much time: 30%
- Cannot use phone/laptop: 30%

Take TTC (20%)



Reasons for Choosing:

- Inexpensive: 69%
- No other alternative: 35%
- Convenient location: 34%

Reasons for Dislike:

- Too crowded / congested: 51%
- Takes too much time: 51%
- Have to take too many forms of transportation: 34%
- Does not go non-stop to the airport: 34%
- Not reliable: 34%

Q67/Q69: People prefer specific methods of transportation for different reasons. Below are a number of different reasons that could be used to describe why a person would choose one type of transportation over another to get to Pearson Airport. Please rank, from the list below, the top 3 reasons you choose [INSERT PRIMARY TRANSPORTATION] as your primary method of transportation into / out of Pearson Airport.

Please use the following ranking: 1 is the top reason you choose this method, 2 is the second reason you choose this transportation, and 3 is the third reason.

Q68/Q70: Not every transportation method is perfect. Below are some things that people have mentioned they dislike about the transportation method they use to get to Pearson Airport. Please rank, from the list below, the top 3 aspects that you dislike about [INSERT PRIMARY TRANSPORTATION] into / out of Pearson Airport. Please use the following ranking: 1 is the #1 aspect you dislike about this transportation method, 2 is the second-most reason you dislike this method, and 3 is the #3 reason you dislike this transportation method.

Awareness & Appeal of the Air Rail Link





Summary

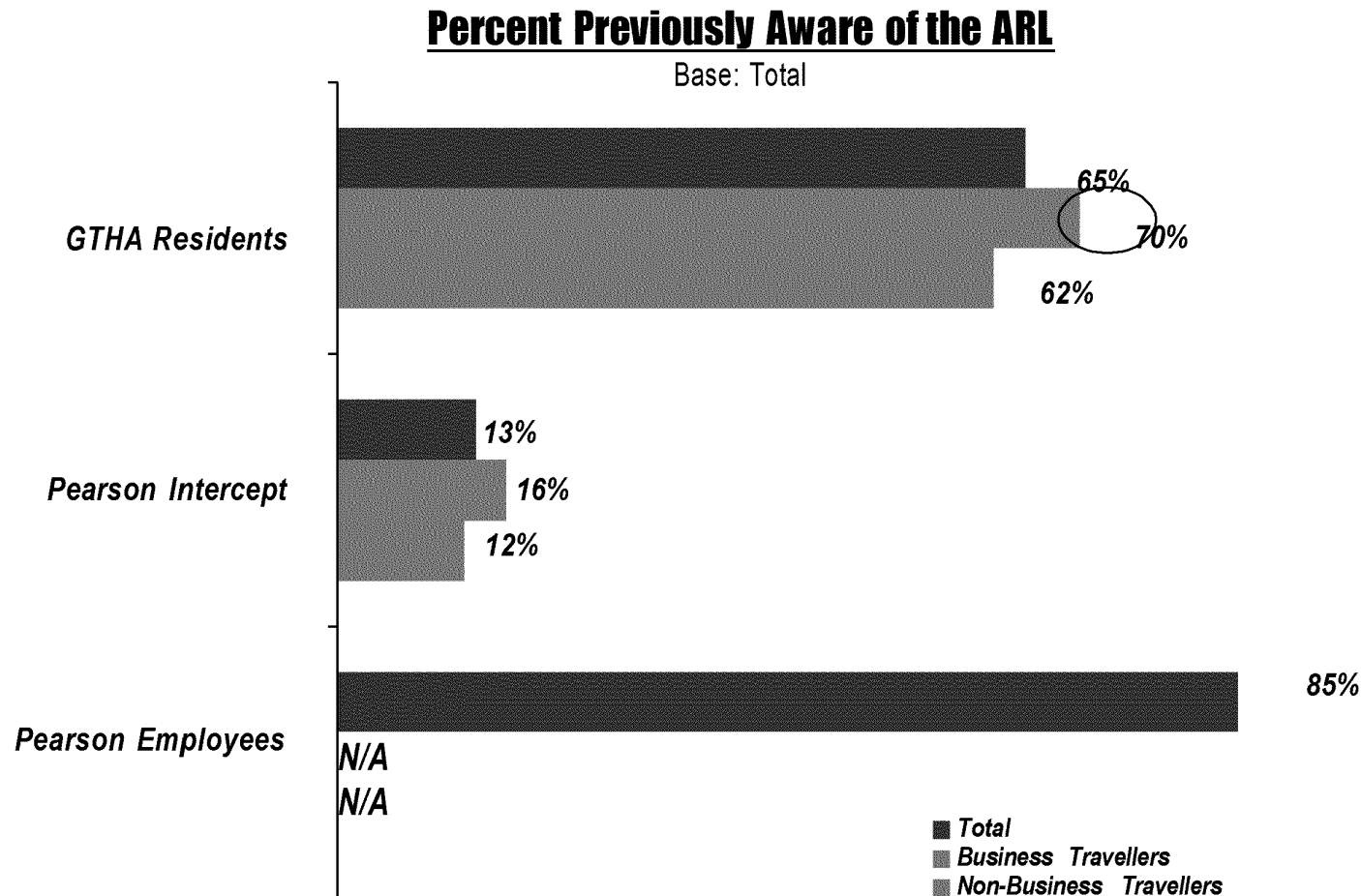
Given that the ARL isn't going to be operational for another 4 years, awareness is extremely high – 65% of GTHA residents and 85% of Pearson Employees are aware of the project. Awareness is, not surprisingly, lower among non-Ontario residents (13%).

Furthermore, interest in taking the ARL is quite high, with 65% of GTHAA travellers and 62% of non-Ontario travellers saying they definitely/probably would take the ARL in the future. Employees are less interested in using the ARL to commute to work – 41% say they would be likely to take it, and the same percentage claim they would not use it.

The most interested GTHA residents are: younger (under 45) and those who live or work in downtown Toronto. Those who live or work in the surrounding areas (particularly in the Halton/Hamilton region) are the least likely to anticipate using the ARL.

Prior Awareness of the ARL

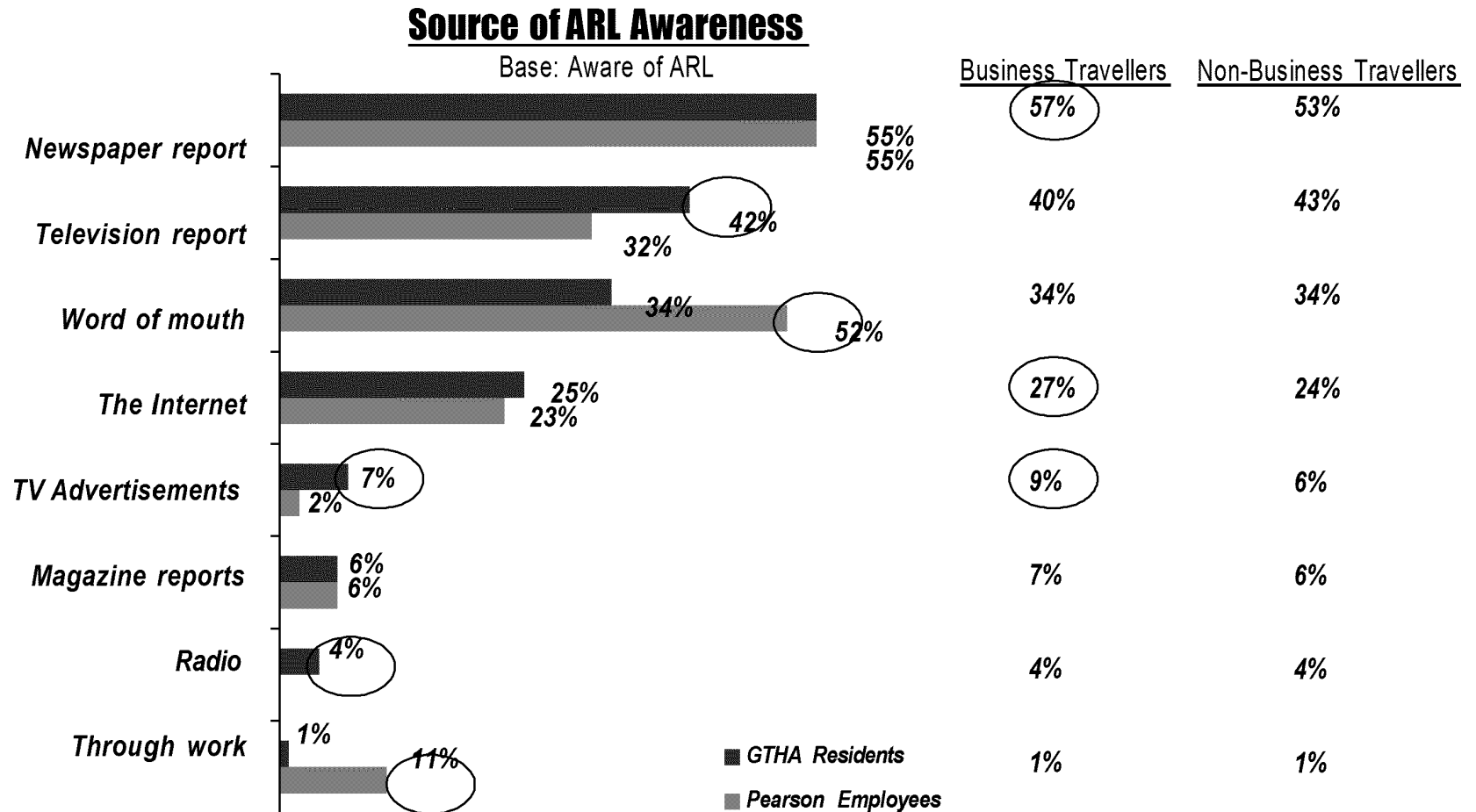
- ‰ Awareness of the ARL among GTHA residents is already very high (65%), even though the project itself won't be completed until 2015.
- ‰ Only a handful of non-Ontario residents (13%) are aware of the plans to build the Air Rail Link.



Q11. The Airport Rail Link (ARL) is a proposed dedicated train that will connect Pearson Airport with Union Station in downtown Toronto, and is scheduled to begin service in 2015. Prior to today, have you heard of the Airport Rail Link (ARL)?

Source of ARL Awareness

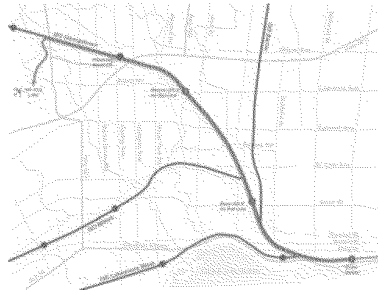
‰ Newspaper reports is the top source of awareness for the ARL, followed by word of mouth (for Pearson Employees) and television reports (for GTHA residents).



Q12. And how did you hear about the ARL, prior to today? Please select all that apply.
 * Note: question not asked during Pearson Intercepts

ARL Description (as shown to respondents)

The Airport Rail Link (the ARL) offers a direct rail connection between Pearson Airport and downtown Toronto Union Station, with stops at Bloor and Weston GO stations. It will commence operations in 2015



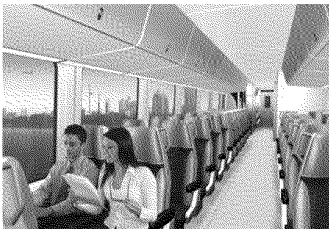
At Pearson Airport, the ARL will connect directly with Terminal 1, and will provide an easy connection to the Airport People Mover, which services the Pearson remote parking lots and Terminal 3. At Union Station, a new platform will be built specifically for the ARL. The line will have 4 stations: Union Station, Bloor GO station, Weston GO station, Toronto Pearson International Airport.

It is anticipated that the ARL will operate every 15 minutes between 5am and 1am, seven days a week, and travel time between the airport and downtown will be approximately 25-30 minutes.

The service will be a premium high-speed, state-of-the-art service with plush interior, luggage racks, onboard monitors displaying flight information on trips to Pearson and information about Toronto sites on the trip to Union.

The terminal stations at Union and Pearson will have comfortable lounges, which will have an open, modern feel. The terminal at Pearson will have centralized multi-language passenger information and platform edge doors for safety.

Other planned services and amenities include: lounge attendants, PRESTO (Electronic Farecard), linkage of ticketing with airlines.



Rendering of ARL vehicle



Rendering of Union Entrance Lounge



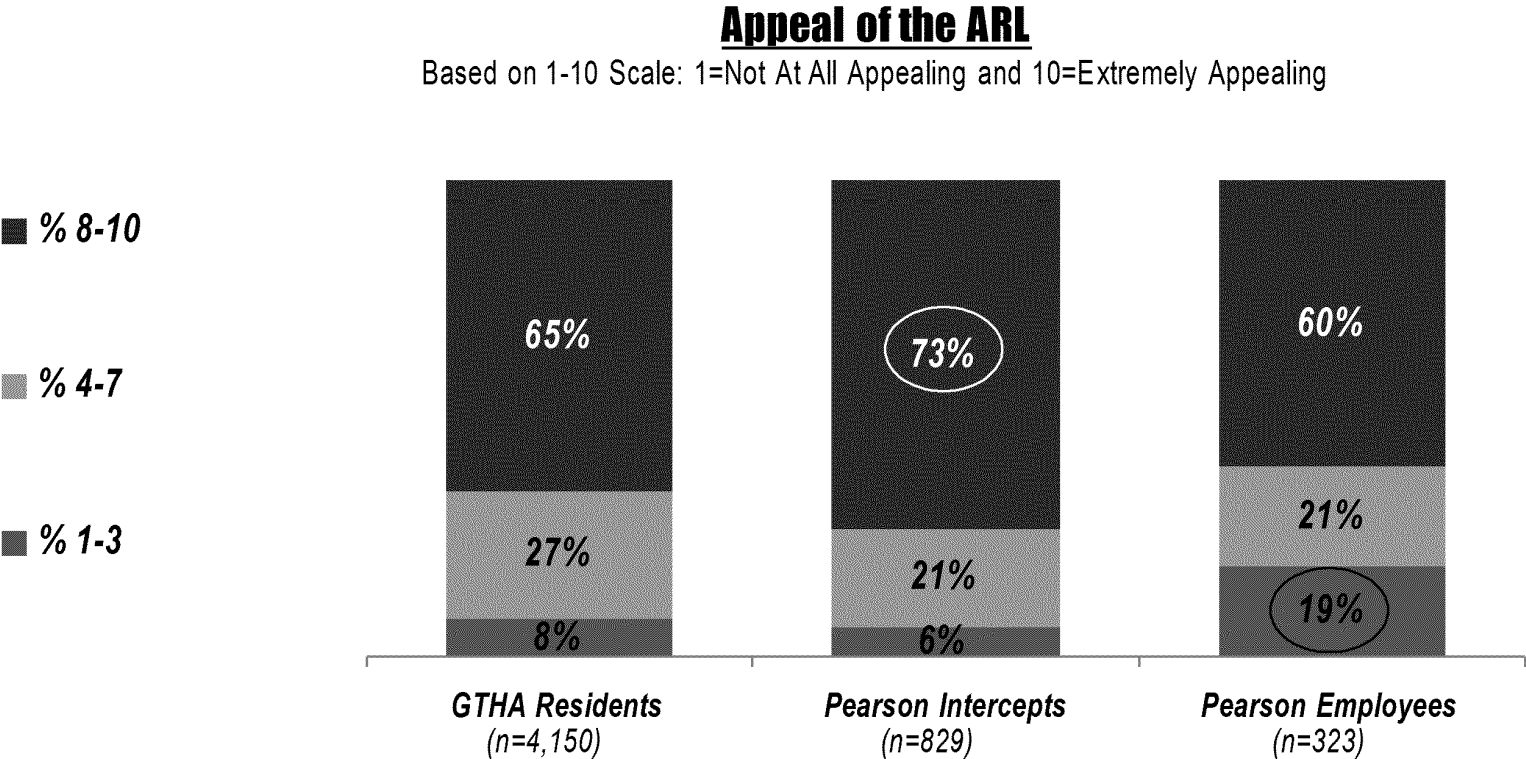
Rendering of Union Waiting Area



Rendering of Pearson Terminal

Appeal of the ARL

Appeal is very high across all target groups, with non-Ontario residents finding the ARL the most appealing.



Q14. Based on what you just read, how appealing is the Airport Rail Link to you, personally?

Appeal of the ARL: By Key Sub-Group

- Among GTHA residents, appeal is highest among younger respondents, females, and those who live in Downtown East. Those living in Pickering find the ARL the least appealing.
- Juxtaposed to this is the results among Pearson Employees, in which older employees (55+) find the ARL the most appealing.

% 8-10	Traveller Type		Age				Gender	
	Business	Non-Business	18-34	35-44	45-54	55+	Male	Female
<i>GTHA Residents</i>	61	66	68	66	60	59	63	66
<i>Pearson Intercepts</i>	68	75	73	72	73	74	71	77
<i>Pearson Employees</i>	N/A	N/A	53	60	58	71	60	61

% 8-10	Region								
	Downtown Core	Downtown West	Downtown East	Toronto West	Toronto East	Scar-borough	Pickering etc	York	West
<i>GTHA Residents</i>	67	68	75	61	62	60	50	55	56
<i>Employees</i>	*	49	*	54	66	*	*	*	56

Pearson Intercepts	Country of Origin			Terminal	
	Canada	US	Other	1	3
<i>% 8-10</i>	72	72	76	72	76

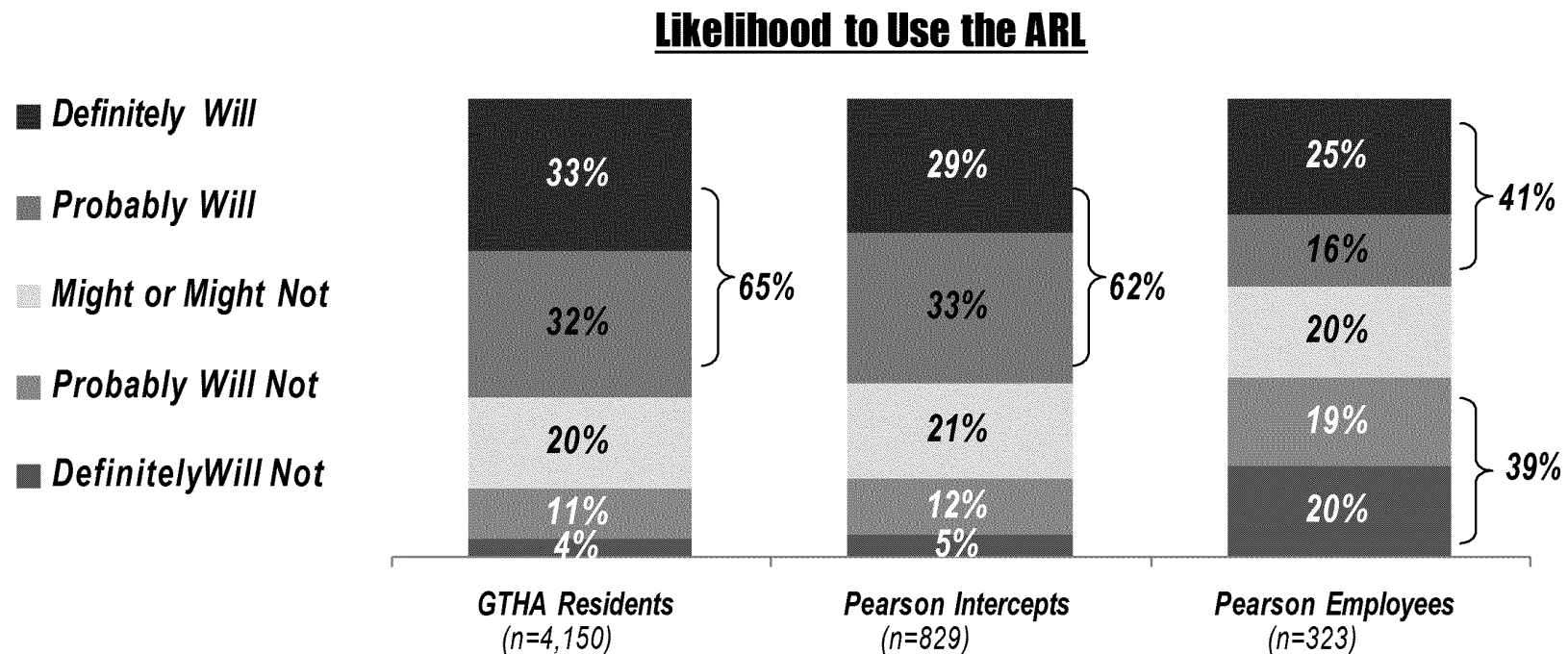


Q14. Based on what you just read, how appealing is the Airport Rail Link to you, personally?

* Note: Base sizes too small (<35) to show results

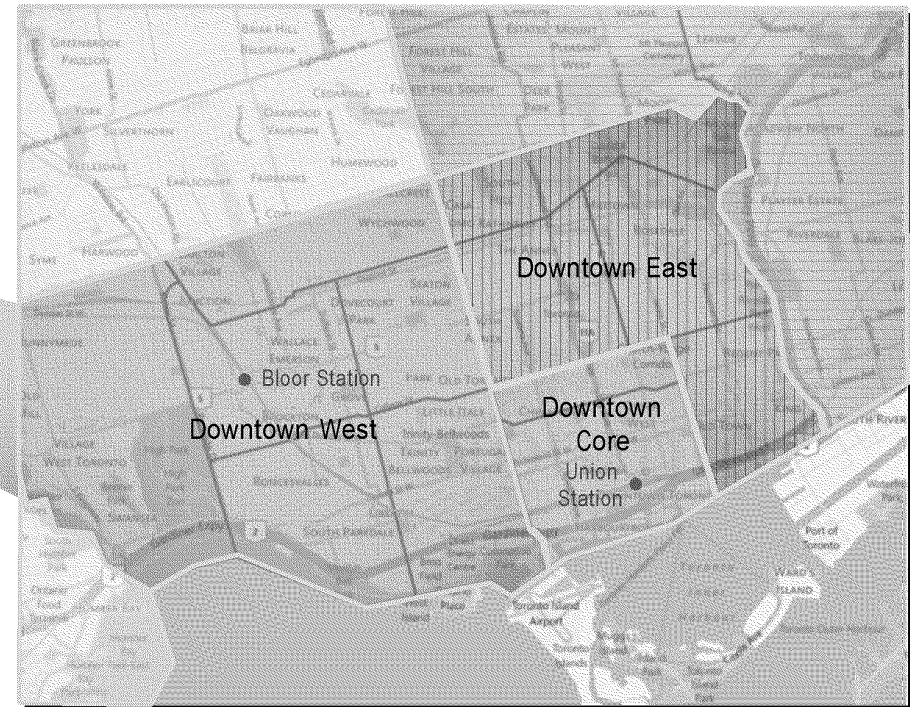
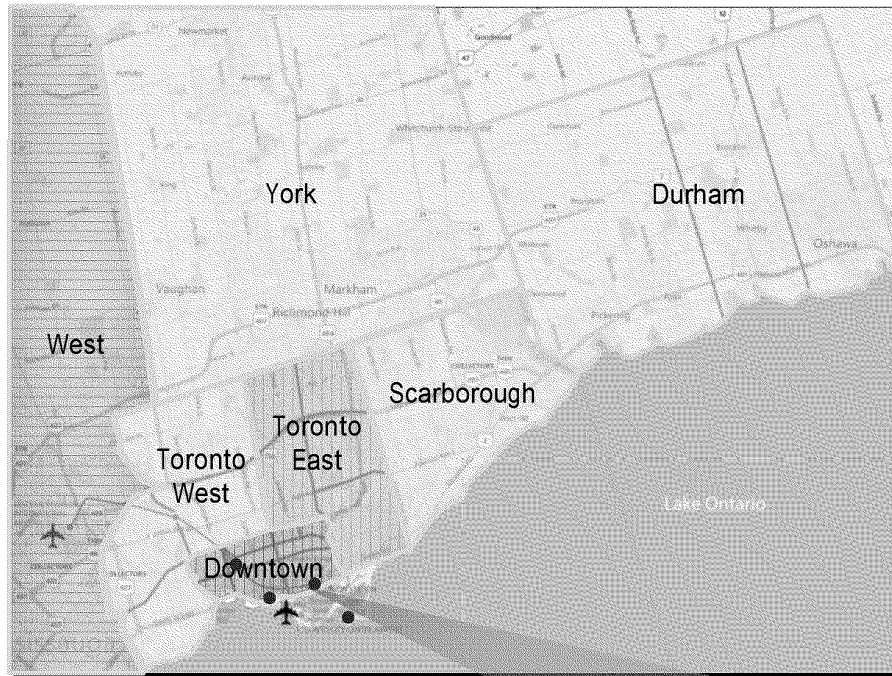
Likelihood to Use the ARL

- Interest among travellers – both GTHA and non-Ontario residents – is high, with 65% saying they definitely or probably would use the ARL in the future.
- Interest is more modest among Pearson employees, with 41% anticipating they would use the ARL. Rejection among this group is fairly high, with a significant number (39%) saying they would not take the ARL.



Q15. How likely would you be to use the ARL to travel into or out of Pearson Airport?

Likelihood to Use the ARL – By Region



Lowest likelihood to use Highest likelihood to use



T2B=<40%

T2B=70% +

Likelihood to Use the ARL – By Key Sub-Group

% Focusing on GTHA residents, those who are younger and live in downtown Toronto are the most likely to claim they would take the ARL in the future. Those living in the West (both travellers and Pearson employees) are the least likely to anticipate using the ARL.

% Def/Prob Would Use ARL	Traveller Type		Age				Gender	
	Business	Non-Business	18-34	35-44	45-54	55+	Male	Female
<i>GTHA Residents</i>	66	64	71	68	55	53	64	65
<i>Pearson Intercepts</i>	63	62	62	61	65	61	66	57
<i>Pearson Employees</i>	N/A	N/A	47	42	33	50	41	42

% Def/Prob Would Use ARL	Region								
	Downtown Core	Downtown West	Downtown East	Toronto West	Toronto East	Scarborough	Pickering etc	York	West
<i>GTHA Residents</i>	70	73	76	55	64	55	49	45	35
<i>Pearson Employees</i>	*	46	*	40	64	*	*	*	23

Pearson Intercepts	Country of Origin			Terminal	
	Canada	US	Other	1	3
<i>% Def/Probably Would Use ARL</i>	59	65	64	63	61



Q15. How likely would you be to use the ARL to travel into or out of Pearson Airport?

* Note: Base sizes too small (<35) to show results



Perceptions of the ARL

Summary



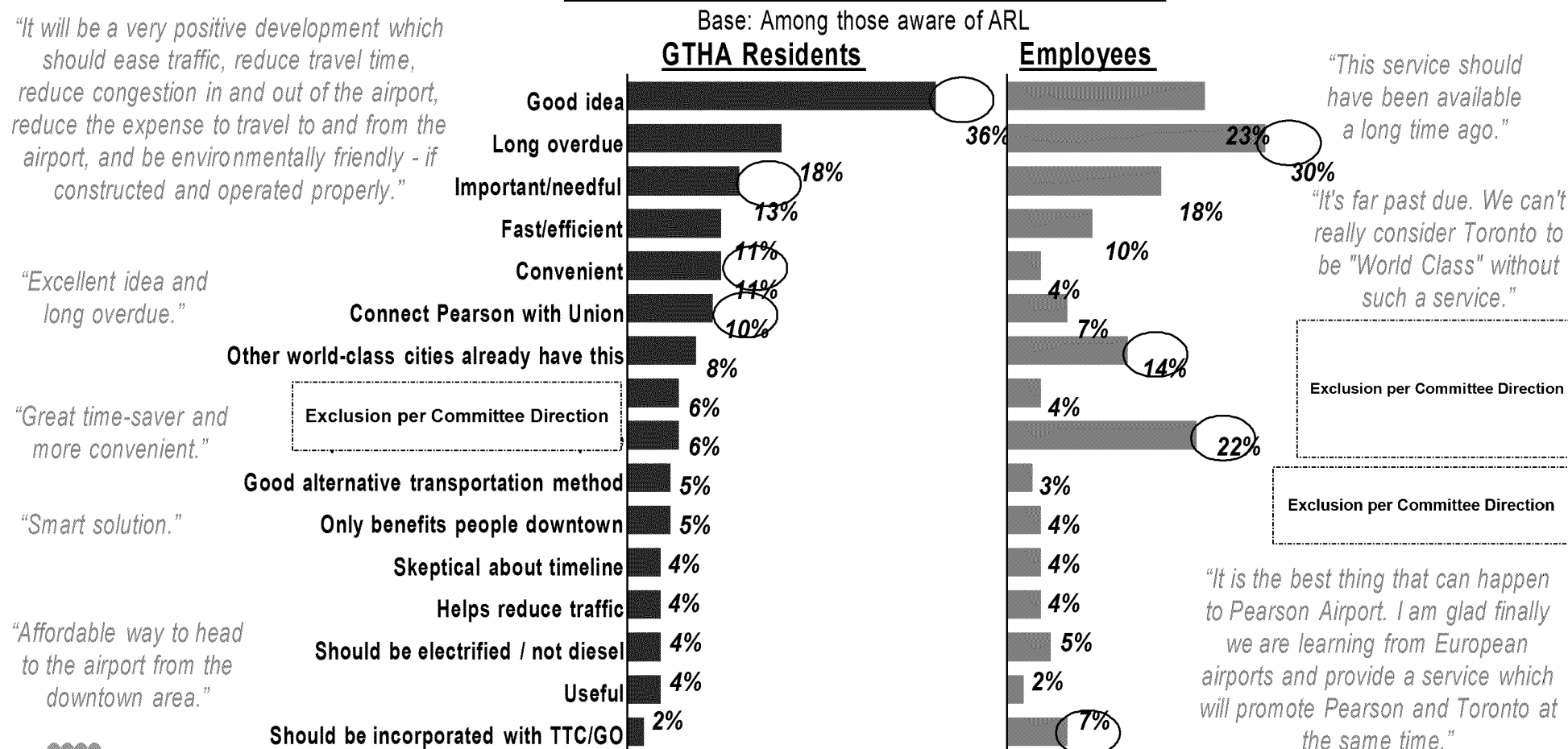
The most important attributes – those most highly correlated with likelihood to take the ARL – are those associated with convenience and speed and ease of service.

Given that the ARL is still at the early development stage, it is not surprising that survey participants rate these functional attributes more modestly. The current strengths of the ARL are its ability to improve perceptions of the city and Pearson. It is also rated very highly for being comfortable, modern, and the environmentally friendly choice.

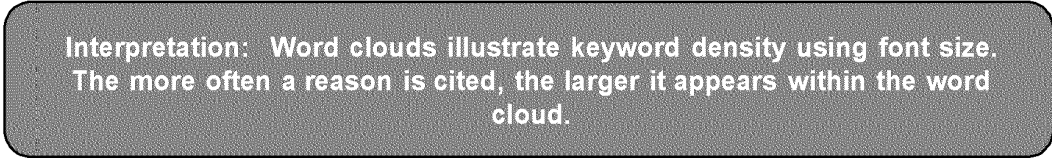
Top of Mind Impressions of ARL Service

- %% Prior to concept exposure, those aware of the ARL were asked, open-ended, to provide their impressions of the service.
- %% Both GTHA residents and Employees feel that the ARL is a good idea, though long overdue.
- %% GTHA residents appear to be more positive towards the ARL than Employees (good idea, important, convenient), while Employees are more pessimistic and functional driven (overdue, behind other cities, expensive, should connect with TTC/GO).

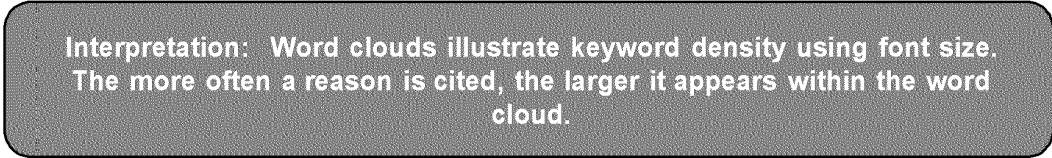
Impressions of ARL Service (Open-Ended)



Marketing Communications



Marketing campaign proposal

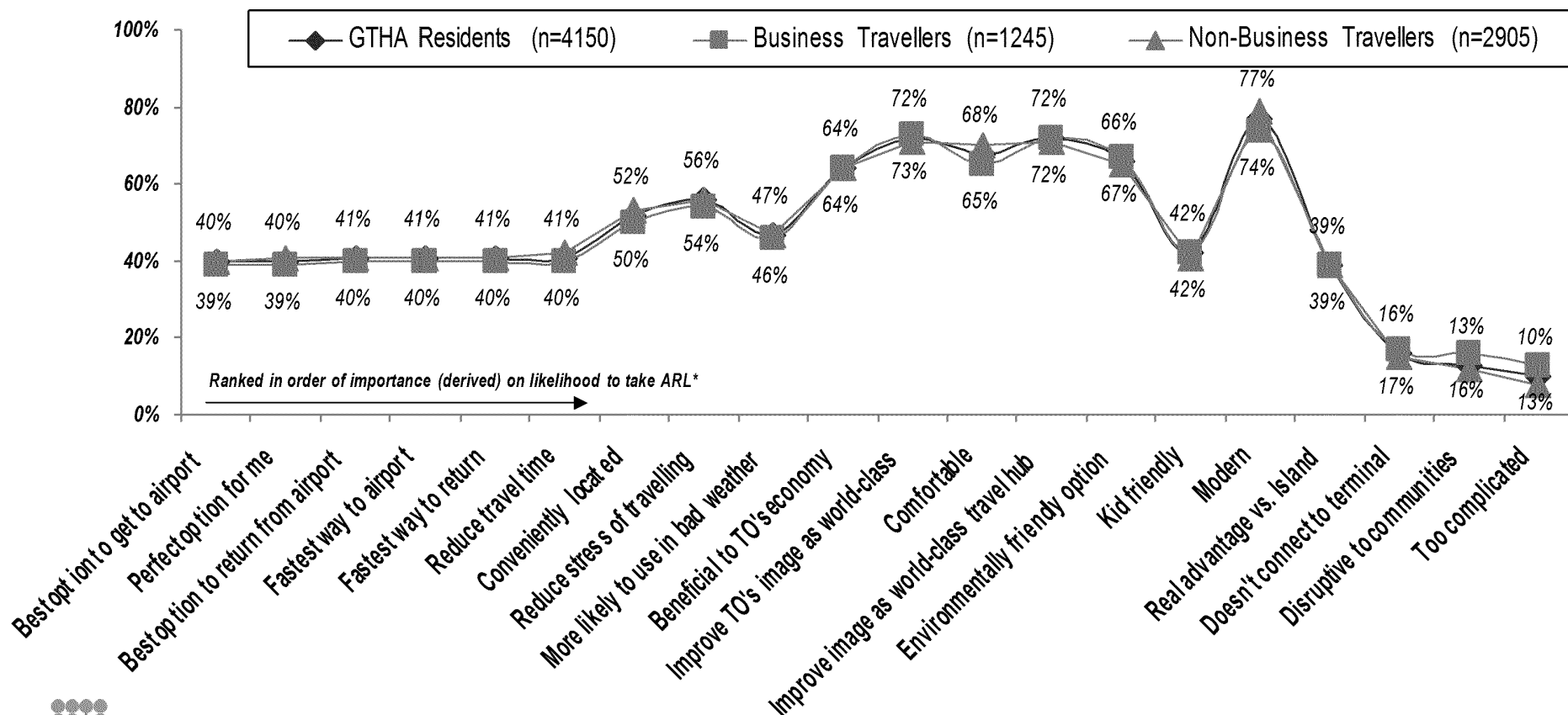


Perceptions of the ARL – Among GTHA Residents

- ‰ The ARL receives modest scores on attributes most important to GTHA residents - those associated with ease and speed of getting to and from the airport.
- ‰ The ARL's current key strengths are in its ability to improve perceptions of the city and Pearson airport. As well, in terms of design elements, the ARL is seen as modern and comfortable.

Perceptions of ARL

% Rating 8-10 on a 10-Point Scale From Does Not Describe At All to Describes Perfectly

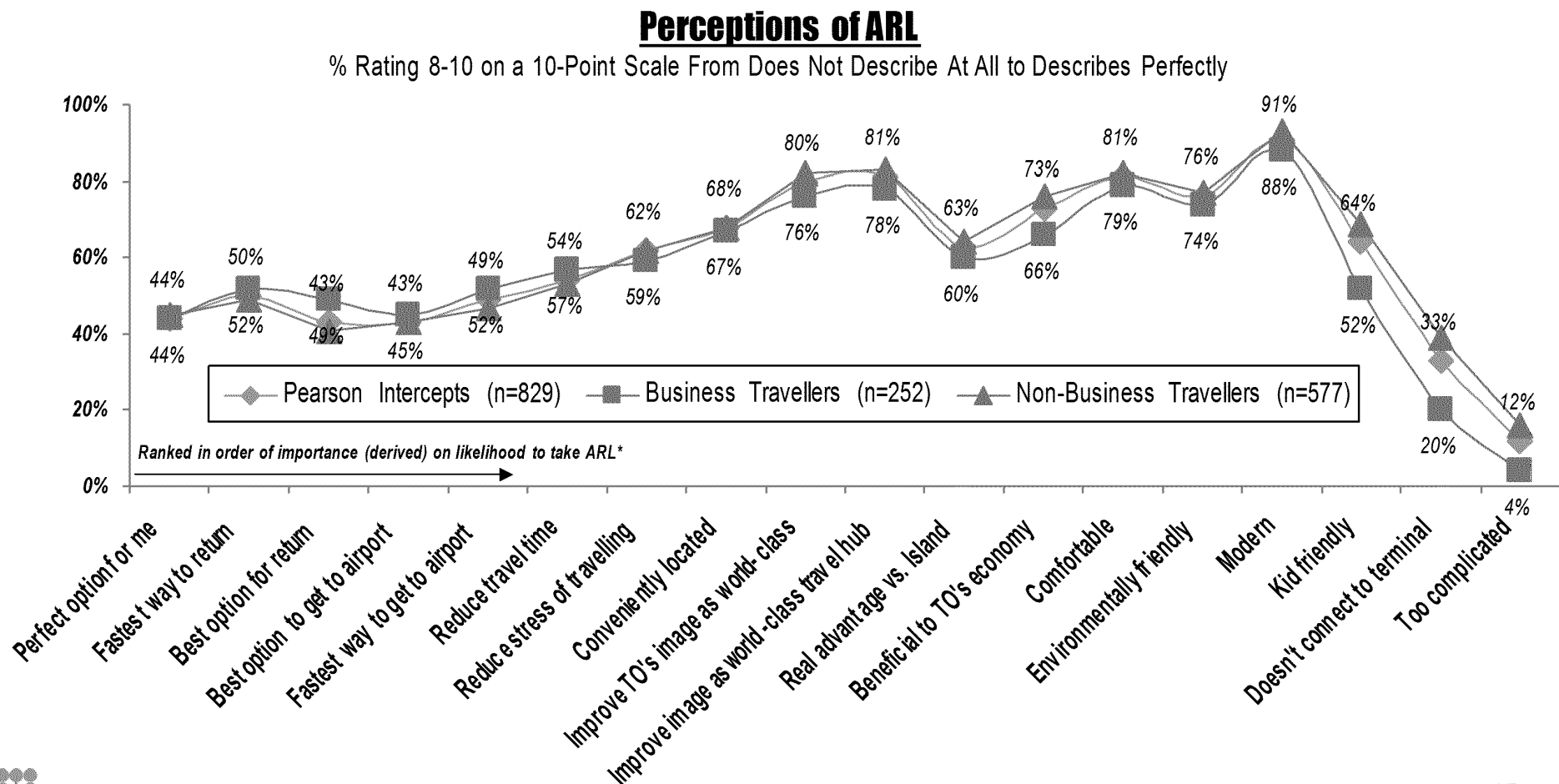


Q16. Based on what you have just read today about the ARL, how well do the following statements describe the ARL? Please use a 10-point scale, where 1 means 'Does Not Describe At All' and 10 means 'Describes Perfectly'.

*See appendix for definition of derived importance

Perceptions of the ARL – Pearson Intercepts

- ‰ The key drivers of likelihood to take the ARL among non-Ontario residents mirror those of GTHA residents.
- ‰ Business travellers are slightly more likely than non-business travellers to see the ARL as the best transportation option (although ratings, overall, are moderate on these metrics), whereas non-business travellers are more likely to appreciate the design elements (modern) and anticipate that it will be child friendly.



Q16. Based on what you have just read today about the ARL, how well do the following statements describe the ARL? Please use a 10-point scale, where 1 means 'Does Not Describe At All' and 10 means 'Describes Perfectly'.

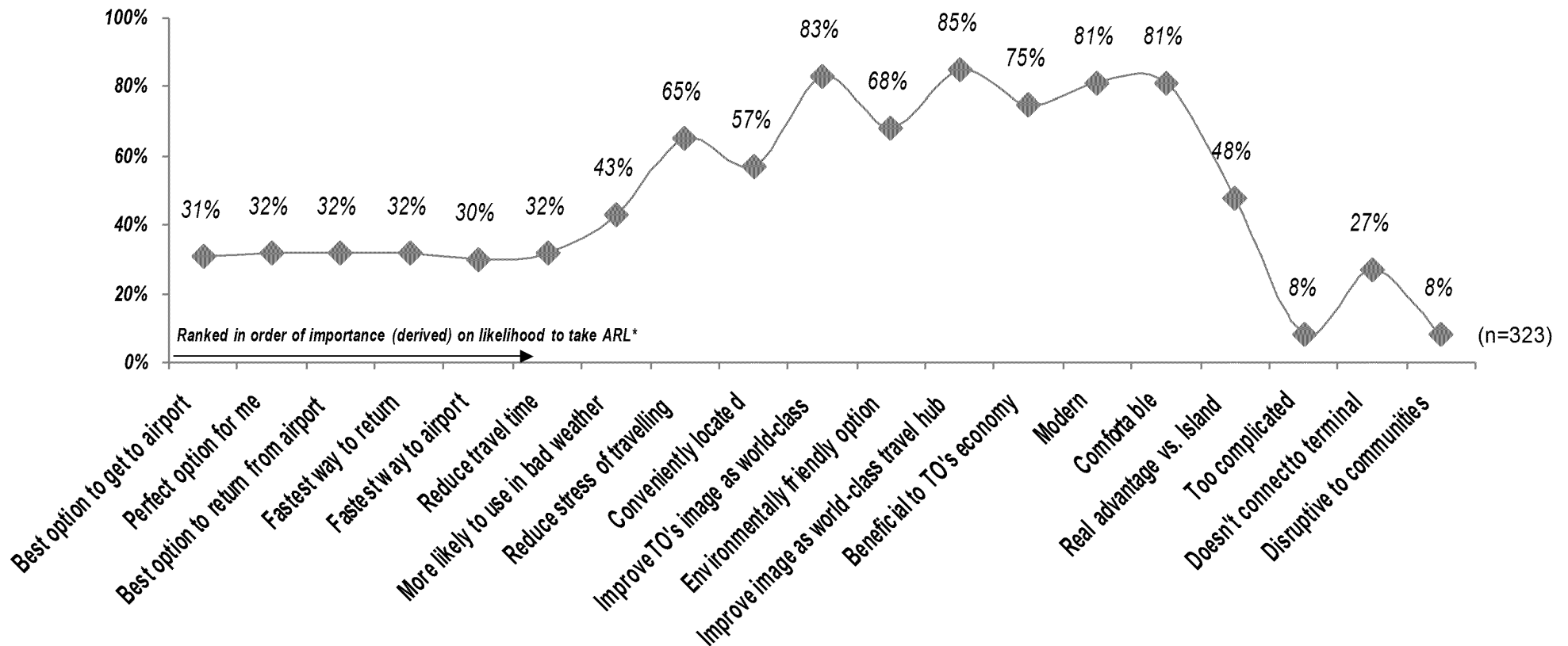
*See appendix for definition of derived importance

Perceptions of the ARL – Among Pearson Employees

‰ Pearson Employees, while appreciating that the ARL will reduce commuting stress and appreciating the benefit of the ARL to the city overall, do not see it as the best method to get them to and from the airport for work on a daily basis.

Perceptions of ARL

% Rating 8-10 on a 10-Point Scale From Does Not Describe At All to Describes Perfectly



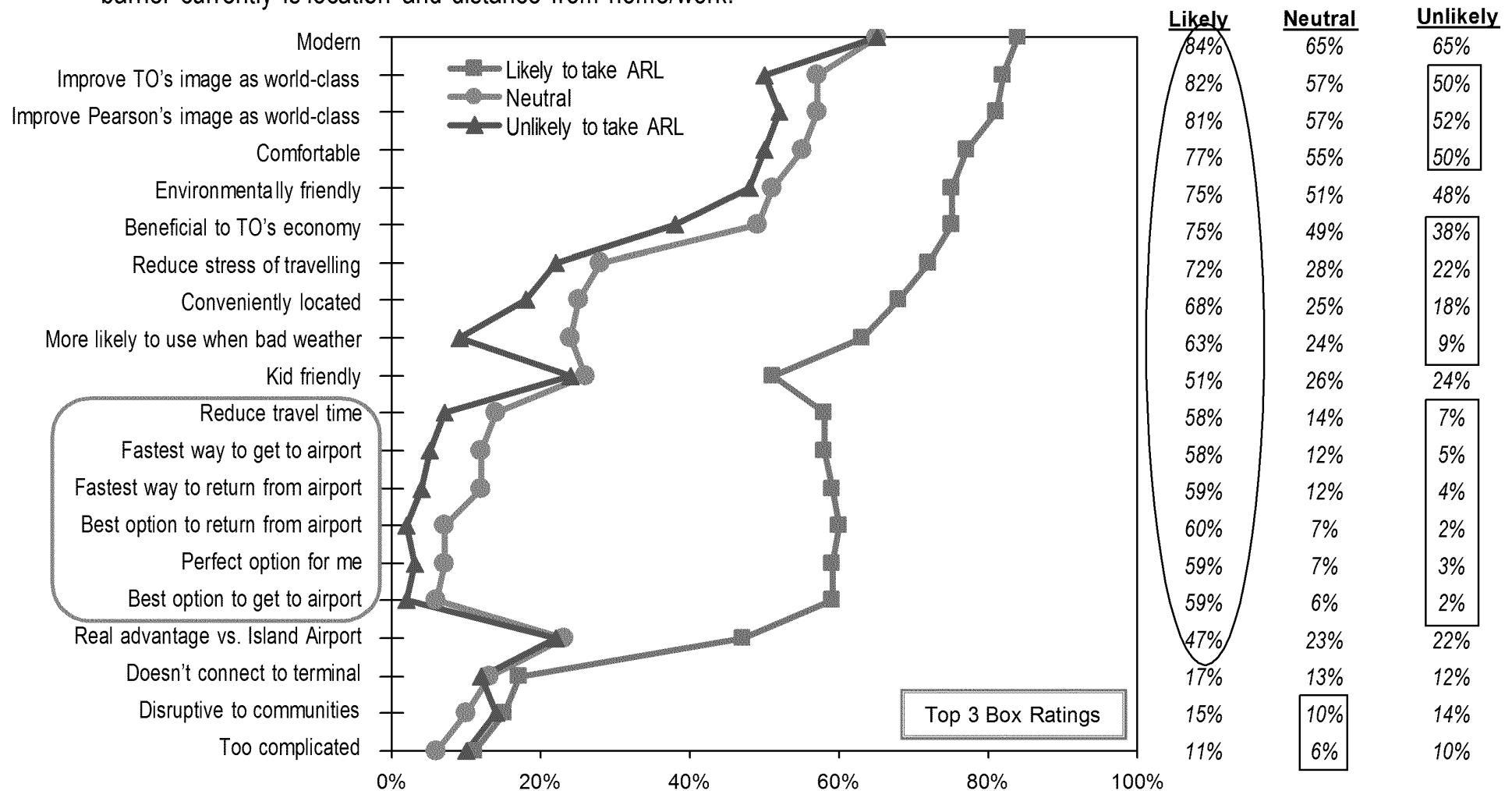
Q16. Based on what you have just read today about the ARL, how well do the following statements describe the ARL? Please use a 10-point scale, where 1 means 'Does Not Describe At All' and 10 means 'Describes Perfectly'.

*See appendix for definition of derived importance

Perceptions of the ARL – Among GTHA Residents

By Likelihood to Take the ARL

% The gap in perceptions of the ARL between those who may or may not take the service and those who are unlikely to take it is small, suggesting that there is more at play in terms of barriers to usage than simply perceptions; specifically, the key barrier currently is location and distance from home/work.

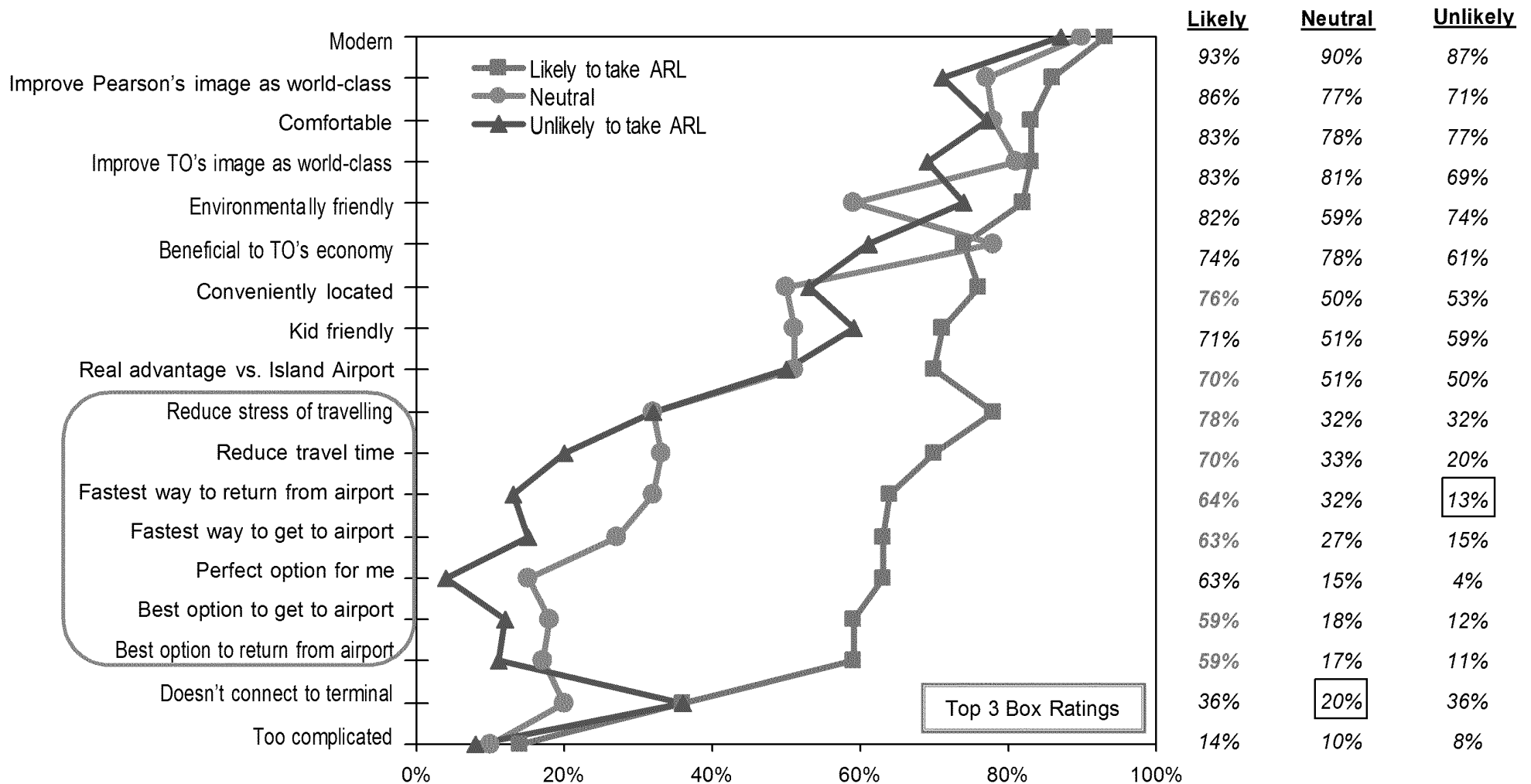


Q16. Based on what you have just read today about the ARL, how well do the following statements describe the ARL? Please use a 10-point scale, where 1 means 'Does Not Describe At All' and 10 means 'Describes Perfectly'.

Perceptions of the ARL – Pearson Intercepts

By Likelihood to Take the ARL

While there are few differences in terms of the imagery benefits associated with the ARL, as with GTHA residents, a key inhibitor for non-Ontario travellers is the concern around the speed of the service, particularly relative to other options.

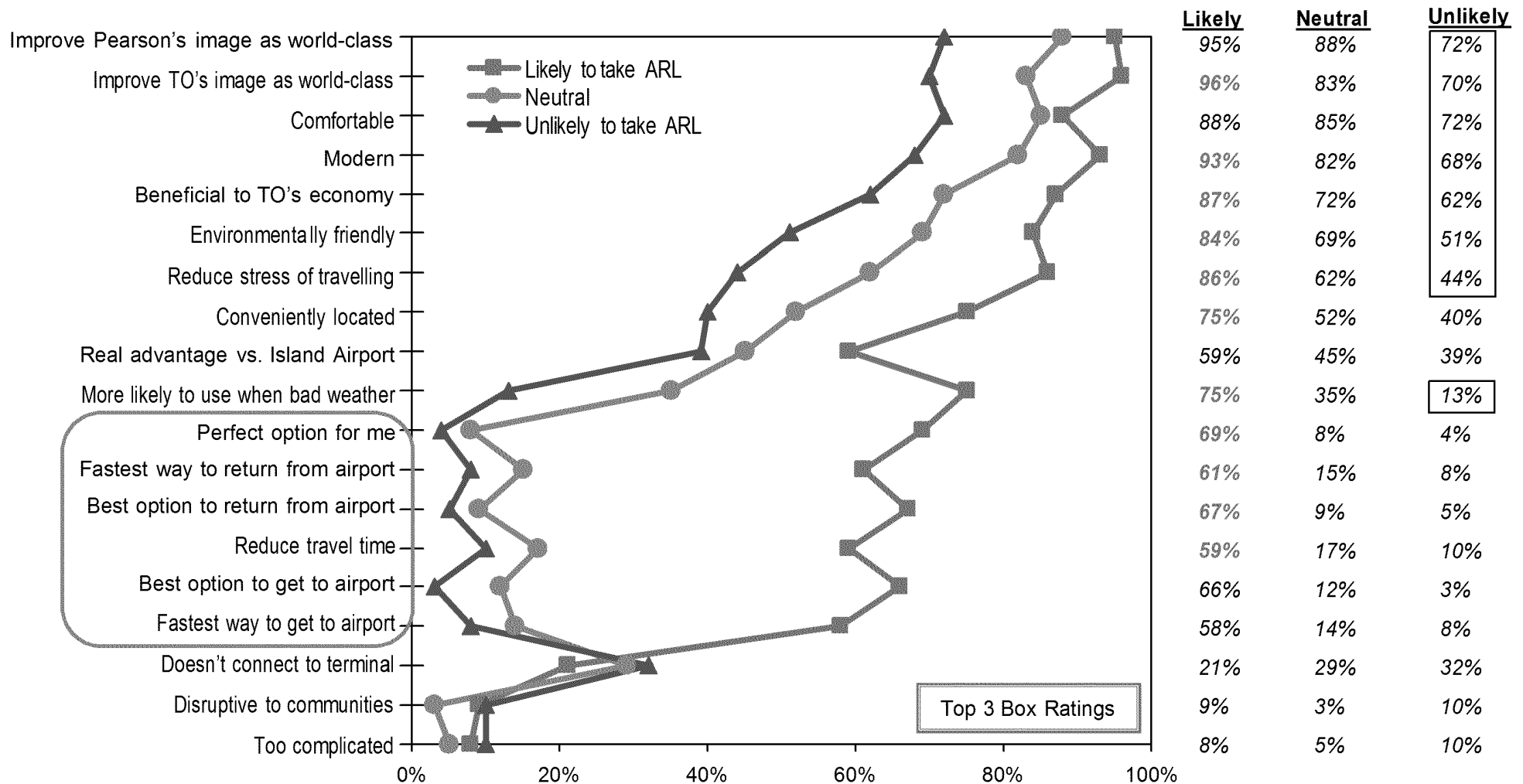


Q16. Based on what you have just read today about the ARL, how well do the following statements describe the ARL? Please use a 10-point scale, where 1 means 'Does Not Describe At All' and 10 means 'Describes Perfectly'.

Perceptions of the ARL – Among Pearson Employees

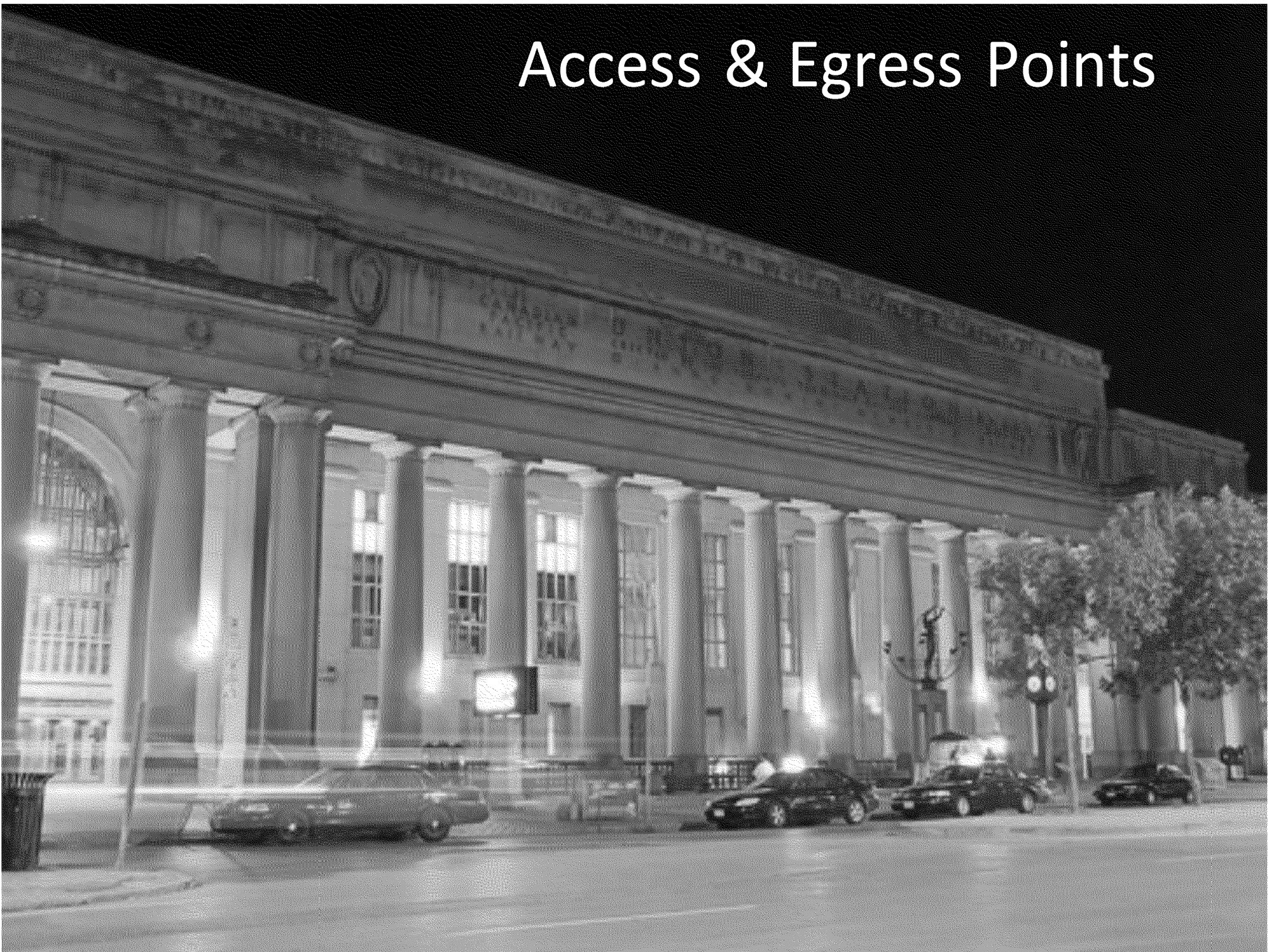
By Likelihood to Take the ARL

As with GTHA residents, the biggest 'gap' between likely users of the service and Pearson Employees who are either unsure, or unlikely, to take the ARL is ratings on convenience and speed of travel to and from the airport.



Q16. Based on what you have just read today about the ARL, how well do the following statements describe the ARL? Please use a 10-point scale, where 1 means 'Does Not Describe At All' and 10 means 'Describes Perfectly'.

Access & Egress Points



Summary



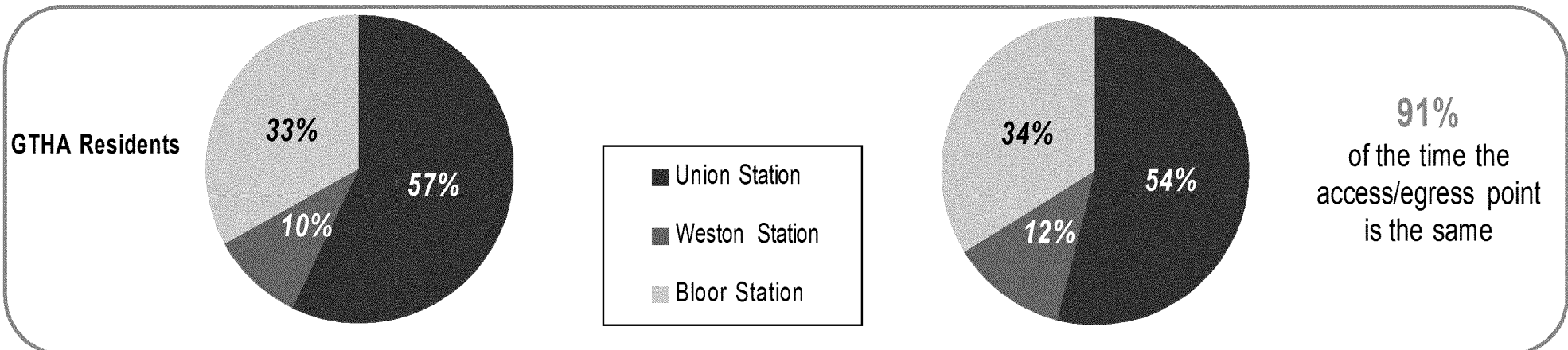
As we saw with transportation methods to and from the airport, nearly all respondents (over 90%) anticipate using the same access/egress points to get to the ARL, and about the same percentage anticipate using the same method (primarily the TTC) to get to and from the station.

Given that nearly everyone travels to Pearson from home, and given where survey respondents live, it isn't overly surprising that one-third of GTHA residents anticipate using Bloor Station, and more than half plan to use Union.

Likely Access & Egress Points

- Over half of respondents anticipate using Union Station, while nearly one-third plan on using Bloor Station.
- For nearly all occasions, the access/egress point will be the same when taking the ARL.

Access Point for ARL



Egress Point for ARL



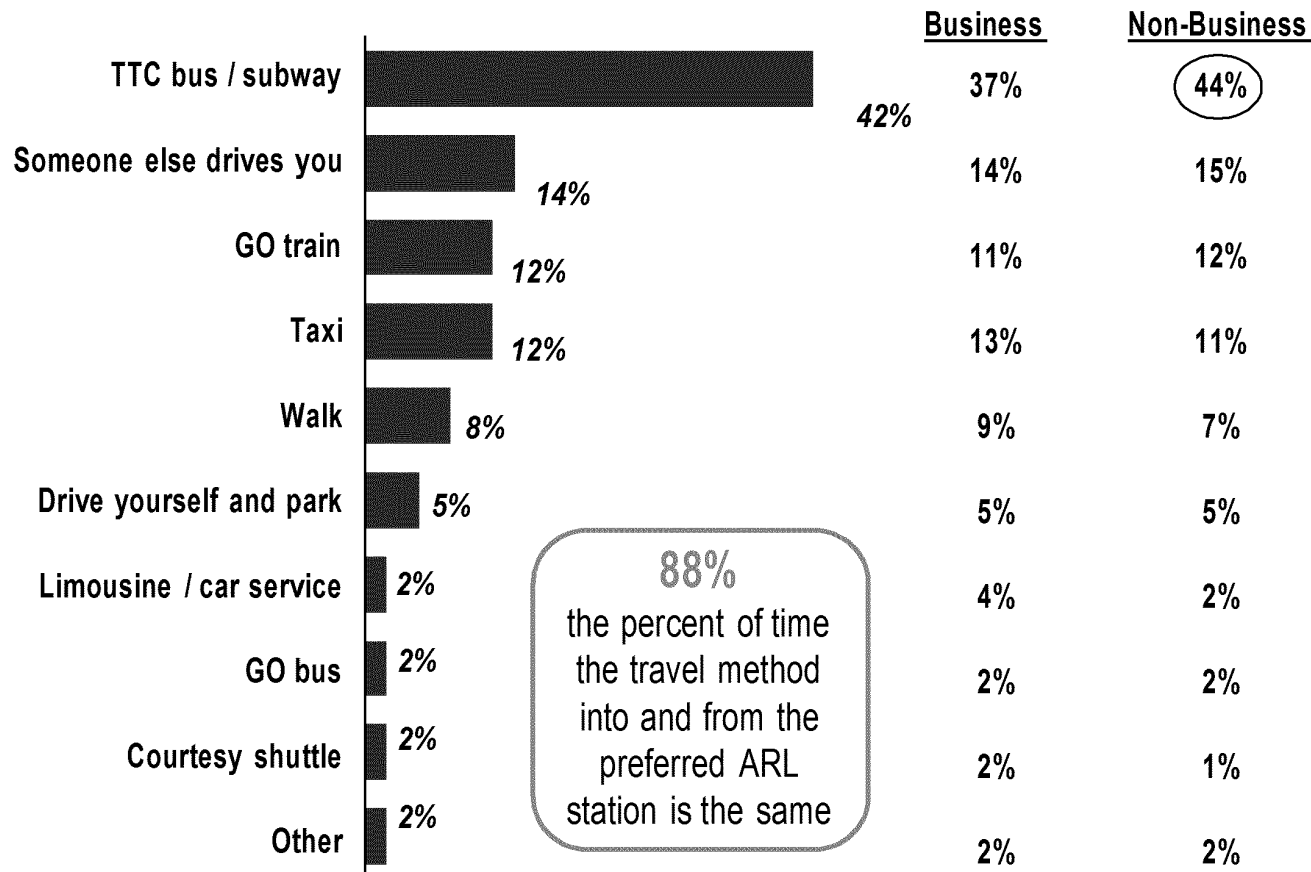
Q17. Thinking about when you would take the ARL into Pearson Airport, from which station would you take the ARL? And when returning home or to your office out of Pearson via the ARL, which station would you get off at? * Note: this question was not asked in the Pearson Intercept study.

Main Method of Travel To/From Preferred ARL Station

Among GTHA residents, the TTC would be the most commonly used transportation method to get to and from a traveller's preferred ARL station, particularly among Non-Business travellers.

Main Method of Travel To/From Preferred ARL Station

Base: GTHA Residents



Q18. How do you anticipate you would get to [INSERT STATION] when taking the ARL from this point? And how do you anticipate you would get from [INSERT STATION] to your final destination when returning home from Pearson Airport via the ARL?

Main Method of Travel To/From Preferred ARL Station

- ‰ Younger travellers and those living downtown are the most likely to use the TTC to get to and from their ARL station.
- ‰ Pickering residents far more likely than other regions to use the GO train.

GTHA Survey	Age				Gender	
	18-34	35-44	45-54	55+	Male	Female
TTC bus / subway	48	42	38	36	43	42
Someone else drives you	15	13	15	17	12	17
GO train	10	11	15	14	12	12
Taxi	91	41	51	4	12	12
Walk	10	10	6	5	9	8

GTHA Survey	Region								
	Downtown Core	Downtown West	Downtown East	Toronto West	Toronto East	Scarborough	Pickering etc	York	West
TTC bus / subway	43	51	53	38	52	29	4	30	14
Someone else drives you	8	12	7	27	14	27	14	27	23
GO train	10	4	7	5	7	24	65	13	22
Taxi	14	15	16	12	11	4	2	6	8
Walk	19	9	14	5	2	2	2	2	2

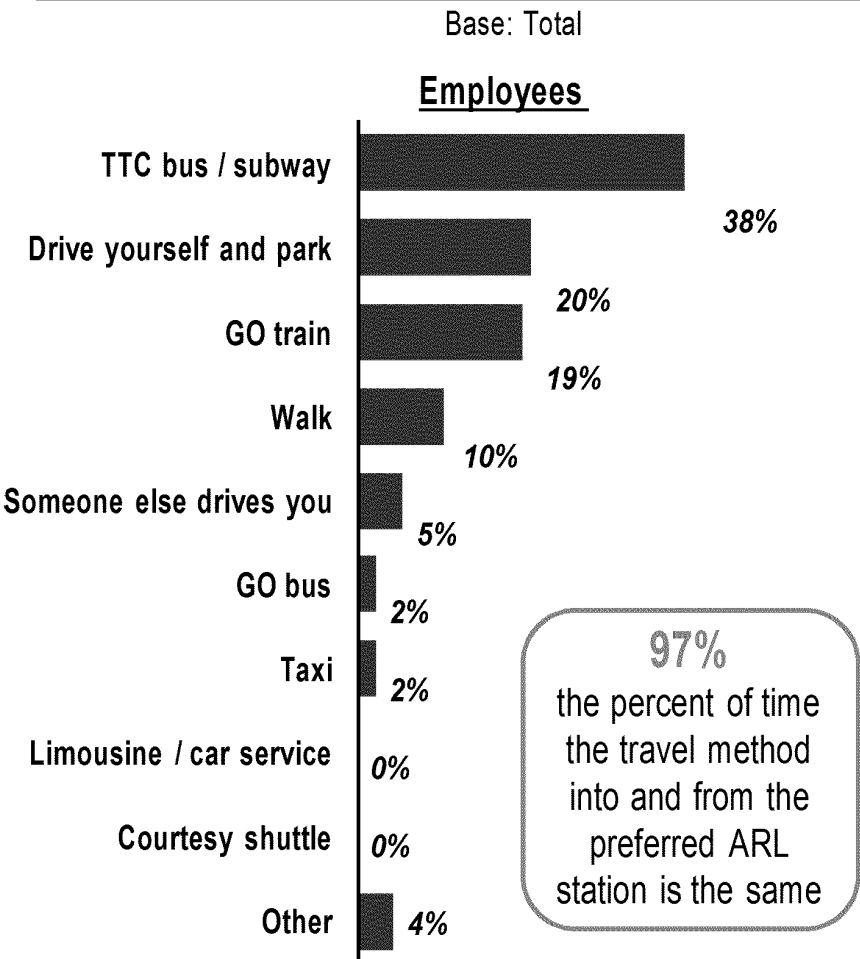


Q18. How do you anticipate you would get to [INSERT STATION] when taking the ARL from this point? And how do you anticipate you would get from [INSERT STATION] to your final destination when returning home from Pearson Airport via the ARL?

Main Method of Travel To/From Preferred ARL Station

Among Employees, the TTC would be the most commonly used transportation method to get to and from a traveller's preferred ARL station (38%), followed by driving themselves (20%) and taking the GO train (19%).

Main Method of Travel To/From Preferred ARL Station



Q18: How do you anticipate you would get to [INSERT STATION] when taking the ARL from this point? And how do you anticipate you would get from [INSERT STATION] to your final destination when returning home from Pearson Airport via the ARL?



Exclusion per Committee Direction

Exclusion per Committee Direction

Exclusion per Committee Direction

Exclusion per Committee Direction

Exclusion per Committee Direction

Exclusion per Committee Direction

Exclusion per Committee Direction

Exclusion per Committee Direction

Exclusion per Committee Direction

Exclusion per Committee Direction

Exclusion per Committee Direction

Exclusion per Committee Direction

Exclusion per Committee Direction

The ARL vs. The Competition



Summary



While it's important to understand overall appeal of the ARL, it equally important to understand the consideration set, and how likely travellers would be to take the ARL compared with what they are currently using to get to and from Pearson.

When asked this question directly, only 28% of GTHA residents say they would prefer their current method. While 34% of non-Ontario residents would prefer their current method, that is driven primarily by the large proportion who are picked up/dropped off by a friend/family member/colleague – although over half (53%) would still consider taking the ARL. Among Pearson Employees, 39% would stick with their current method of transportation (primarily driving themselves and parking at the airport).

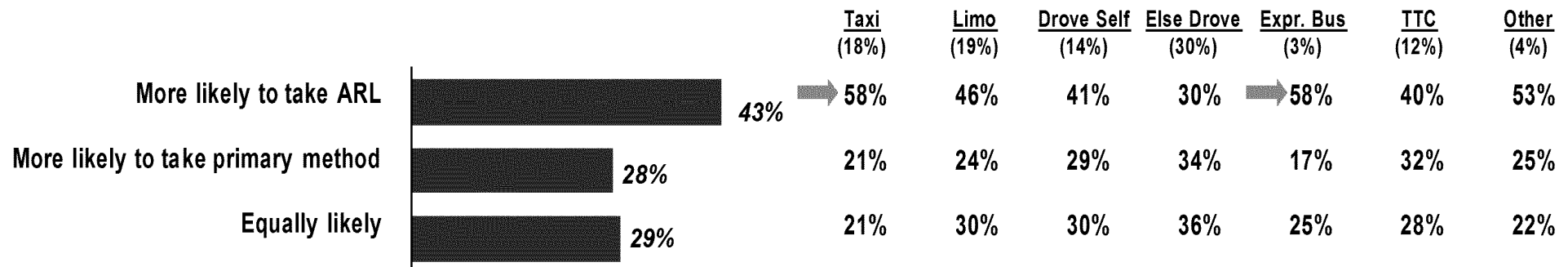
Preferred Travel Method – Among GTHA Residents

‰ GTHA residents, and business travellers in particular, are most likely to prefer the ARL over their current method of transportation to and from the airport – particularly those who take a taxi or the Airport Express Bus.

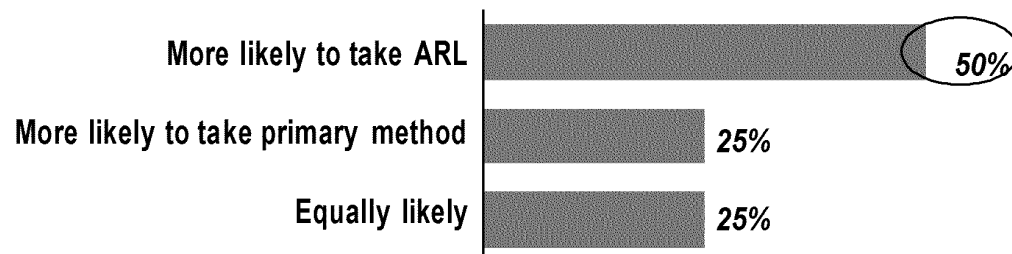
Most Likely Travel Method Into/Out of Pearson

Base: GTHA Residents

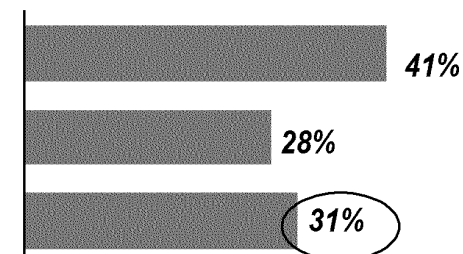
Primary Transportation Method



Base: Business Travellers



Base: Non-Business Travellers



Exclusion per Committee Direction

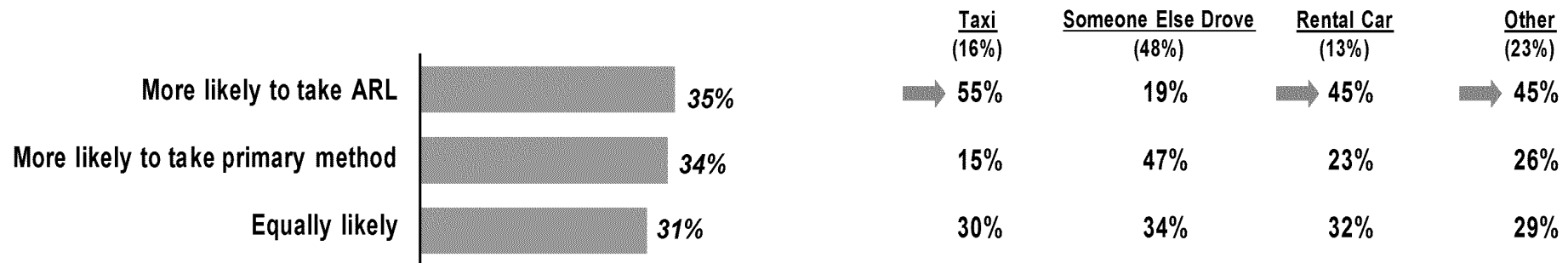
Preferred Travel Method – Among Pearson Intercepts

‰ Business travellers, and those who use a taxi or rental car to get to and from the airport are the most likely to say they would use the ARL over their current preferred transportation method.

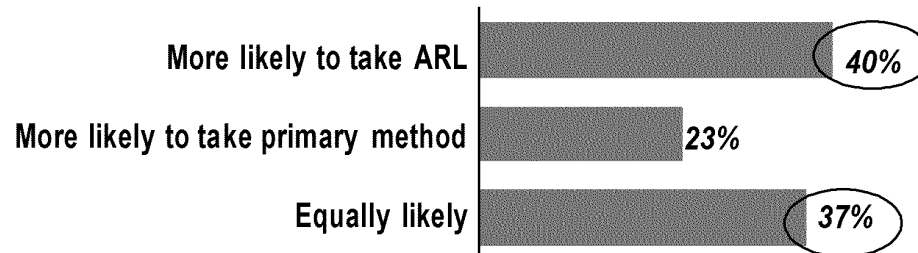
Most Likely Travel Method Into/Out of Pearson

Base: Pearson Intercepts

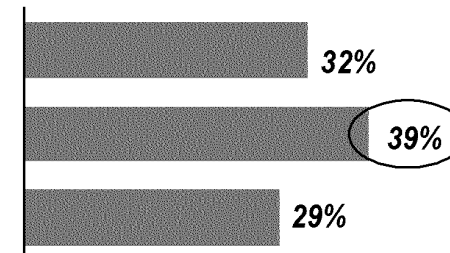
Primary Transportation Method



Base: Business Travellers



Base: Non-Business Travellers



Exclusion per Committee Direction

Preferred Travel Method – Among Pearson Employees

‰ Pearson employees, particularly those who drive themselves (which constitutes 68% of those who participated in the survey) are most likely to continue driving themselves to work. However, those who take the TTC or another method of transportation are very likely to consider taking the ARL when commuting.

Most Likely Travel Method Into/Out of Pearson

Base: Pearson Employees

Primary Transportation Method

	<u>Drove Self</u> (68%)	<u>TTC</u> (20%)	<u>Other</u> (12%)
More likely to take ARL	28%	39%	44%
More likely to take primary method	43%	39%	17%
Equally likely	29%	22%	39%

More likely to take ARL 32%

More likely to take primary method 39%

Equally likely 29%

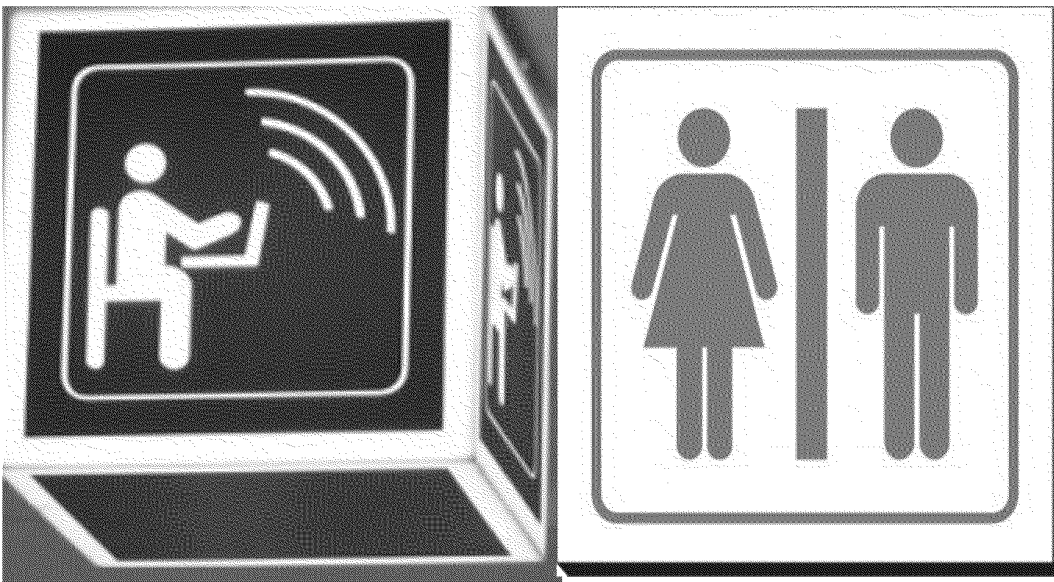
Exclusion per Committee Direction

Amenities



Note: This section not asked in the Pearson Intercepts

Summary



Finally, towards the end of the study, we asked respondents about a number of potential additional amenities that are being considered for the ARL.

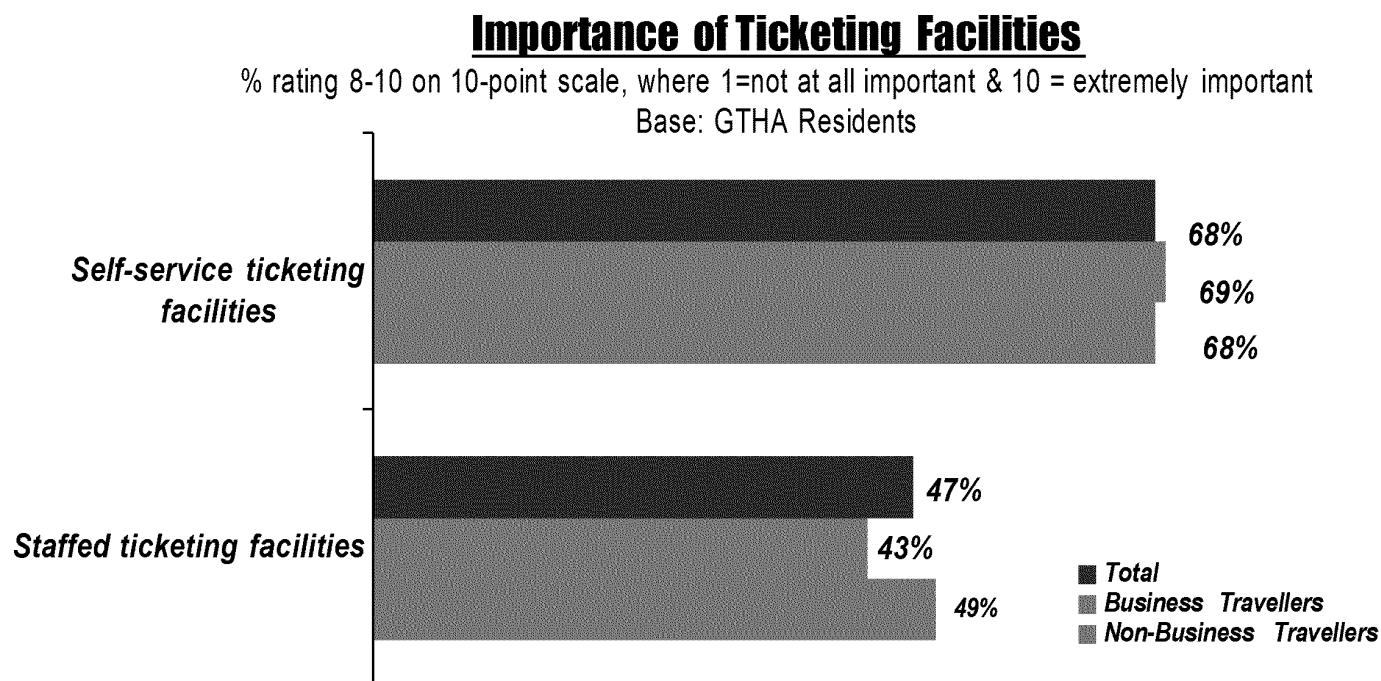
The most popular, across the board, are: onboard washrooms, free Wi-Fi, large luggage racks, onboard flight information display screens, and the ability to collect loyalty points. The least important amenities are: leather seats, free newspapers, public telephones, and refreshments/snacks (at stations, at lounges, and on-board).

These amenities go beyond 'nice to haves' – the inclusion of the most popular amenities has the potential to increase ridership significantly.

When asked specifically about ticketing facilities, self-service is seen as far more important than staff facilities.

Importance of Ticketing Facilities

- Having self-service ticketing facilities is seen as more important than staff ticketing facilities.
- Across the board, both types of facilities are seen as more important among females and those who are likely to take the ARL. Older respondents (55+) are the least likely to feel a self-service kiosk is important.



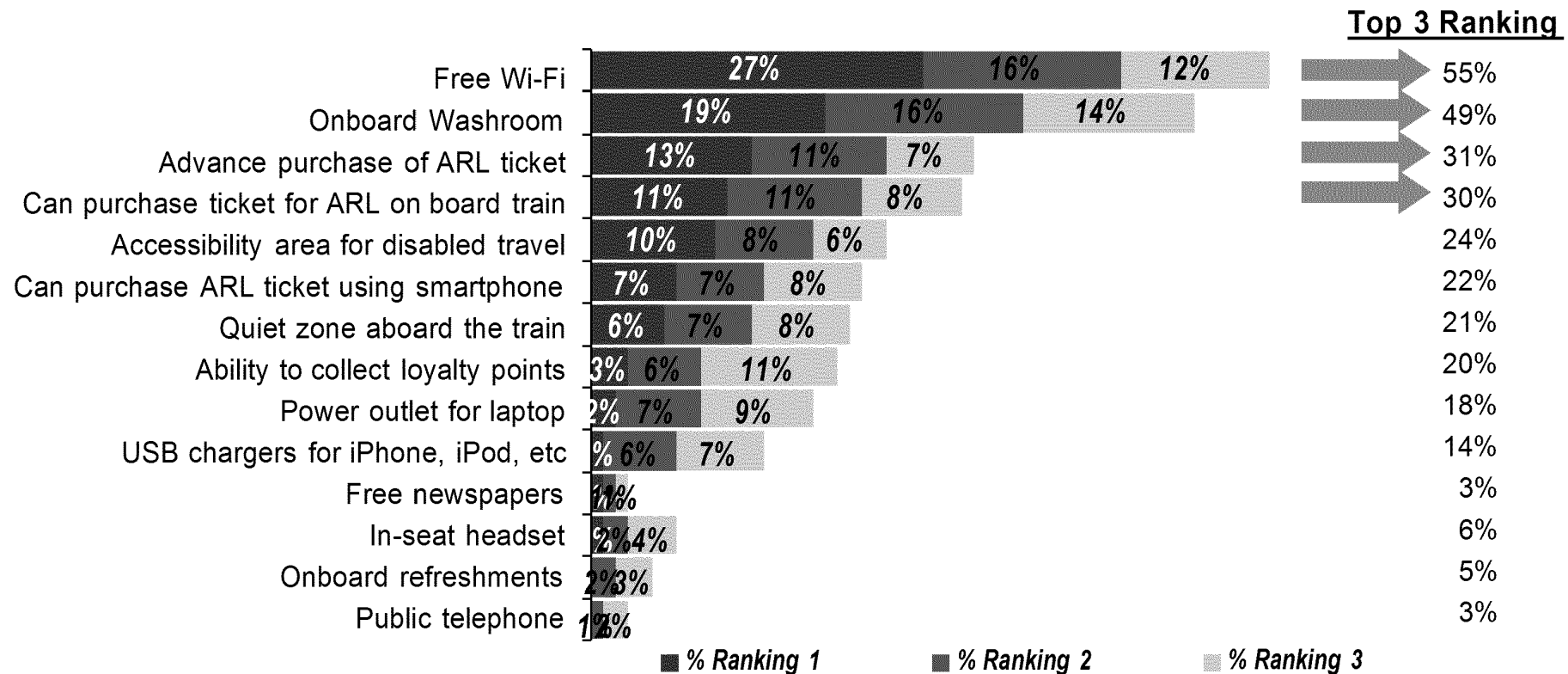
% 8-10	Gender		Likelihood to Take ARL		Age			
	Male	Female	Likely	Not Likely	18-34	35-44	45-54	55+
Self-service	64	72	74	58	70	72	67	60
Staffed	41	53	49	42	45	45	49	53

Q55. How important is it that the ARL have the following options at each of the stations? Please use a 10-point scale where 1 is 'not at all important' and 10 is 'extremely important'.
 * Note: question only asked of GTHA residents

Top Ranked Amenities – Among Pearson Employees

As with GTHA residents, the most important amenities among Pearson employees are: free Wi-Fi, an onboard washroom, and the ability to purchase an ARL ticket in advance.

Pearson Employees Ranking Following Amenities as Important

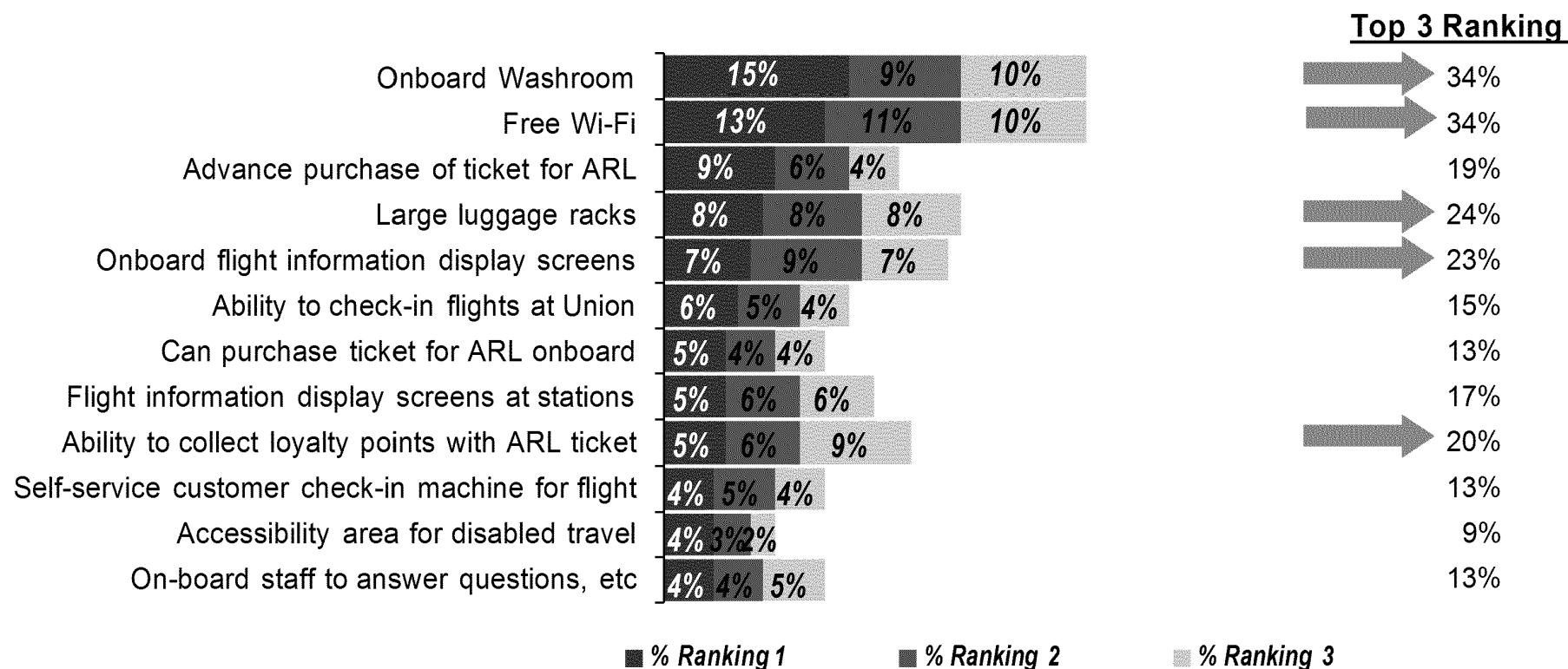


Q54. Of these potential options, please rank the 3 options you find most important, where 1 is the option you find the most important, 2 is the option you find the second most important, and 3 is the option you find the third most important. 77

Top Ranked Amenities – Among GTHA Residents

‰ The most important amenities are onboard washrooms and free Wi-Fi. This is followed by large luggage racks and onboard flight information display screens.

GTHA Residents Ranking Following Amenities as Important

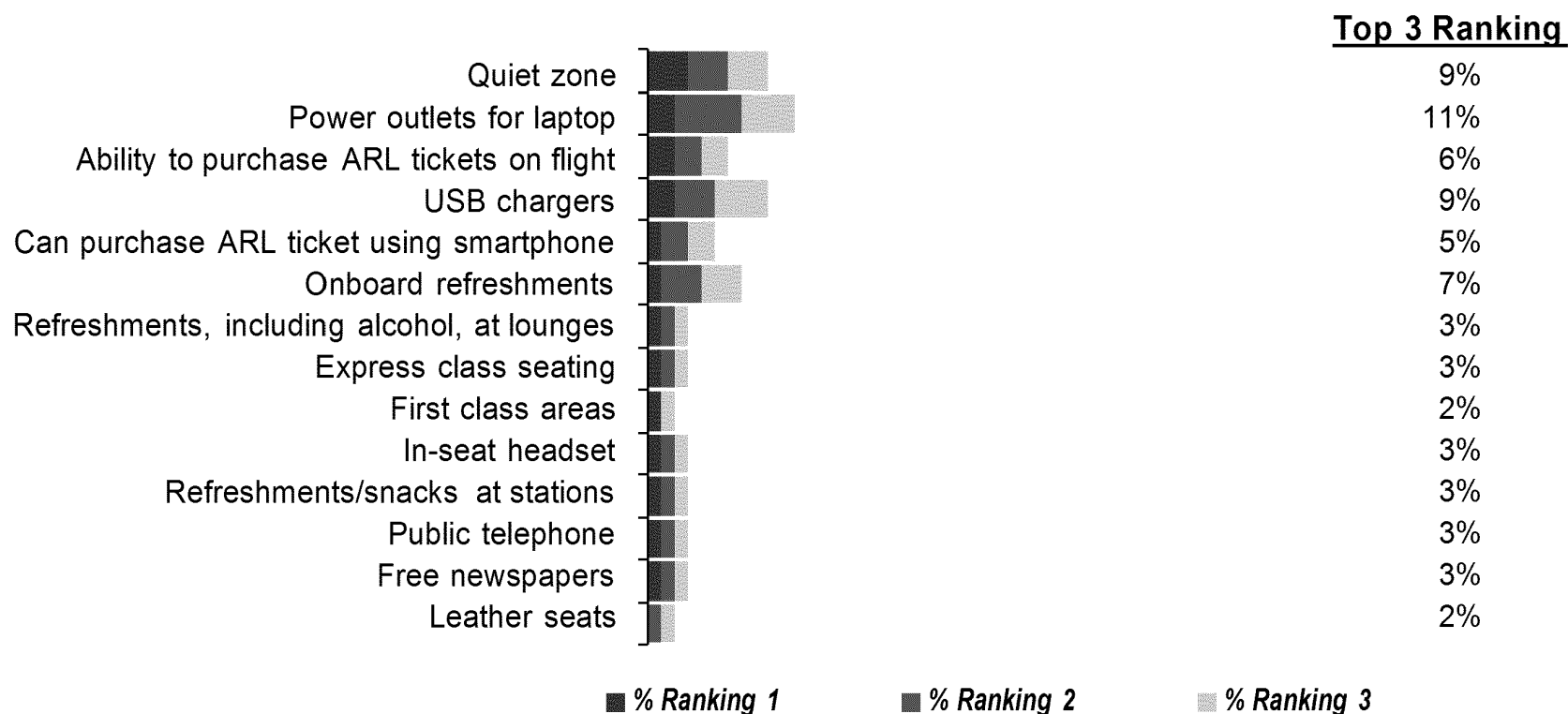


Q54. Of these potential options, please rank the 3 options you find most important, where 1 is the option you find the most important, 2 is the option you find the second most important, and 3 is the option you find the third most important. 78

Top Ranked Amenities – Among GTHA Residents (continued)

Some of the more ‘basic’ amenities, such as free newspapers and refreshments, are deemed relatively unimportant, as are express seating and first class areas. Some potentially expensive upgrades, such as leather seats and in-seat headsets, are also not seen as important to the overall ARL experience.

GTHA Residents Ranking Following Amenities as Important



Q54. Of these potential options, please rank the 3 options you find most important, where 1 is the option you find the most important, 2 is the option you find the second most important, and 3 is the option you find the third most important.

Top Ranked Amenities – Among GTHA Residents

While there are some significant differences between business and non-business travellers, the most important amenities remain the same: onboard washrooms and free Wi-Fi.

% ranking following amenities as most important (1-3)	GTHA Residents		
	Total (n=4150)	Business Travellers (n=1245)	Non-Business Travellers (n=2905)
Onboard washroom	34	31	36
Free Wi-Fi	34	39	32
Large luggage racks	24	23	25
On-board flight information display screens	23	20	23
Ability to collect loyalty program points with purchase	20	21	19
Advance purchase of ticket for ARL	19	15	20
Flight information display screens at stations	17	15	18
Ability to check-in flights at Union Station	15	16	16
Can purchase ticket for ARL aboard train	13	12	15
On-board staff to answer questions, etc	13	11	13
Self-service customer check-in machines for select airlines	13	12	12
Power outlet for laptop	11	16	9
Quiet zone aboard train	9	9	9



Q54. Of these potential options, please rank the 3 options you find most important, where 1 is the option you find the most important, 2 is the option you find the second most important, and 3 is the option you find the third most important.

Top Ranked Amenities – Among GTHA Residents (continued)

% ranking following amenities as most important (1-3)	GTHA Residents		
	Total (n=4150)	Business Travellers (n=1245)	Non-Business Travellers (n=2905)
Accessibility area for disabled travel	9	8	9
USB chargers for iPhone, iPod, etc	9	8	8
Onboard refreshments	7	7	8
Ability to purchase tickets for ARL on flight	6	7	6
Can purchase ARL tickets on smartphone	5	6	5
Refreshments, including alcohol, available at lounges	3	3	3
Refreshments/snacks at stations	3	3	3
Express class seating	3	3	3
Free newspapers	3	3	3
Public telephone	3	2	3
In-seat headset for listening to news/announcements	3	3	2
Has leather seats	2	3	2
First class areas	2	3	2



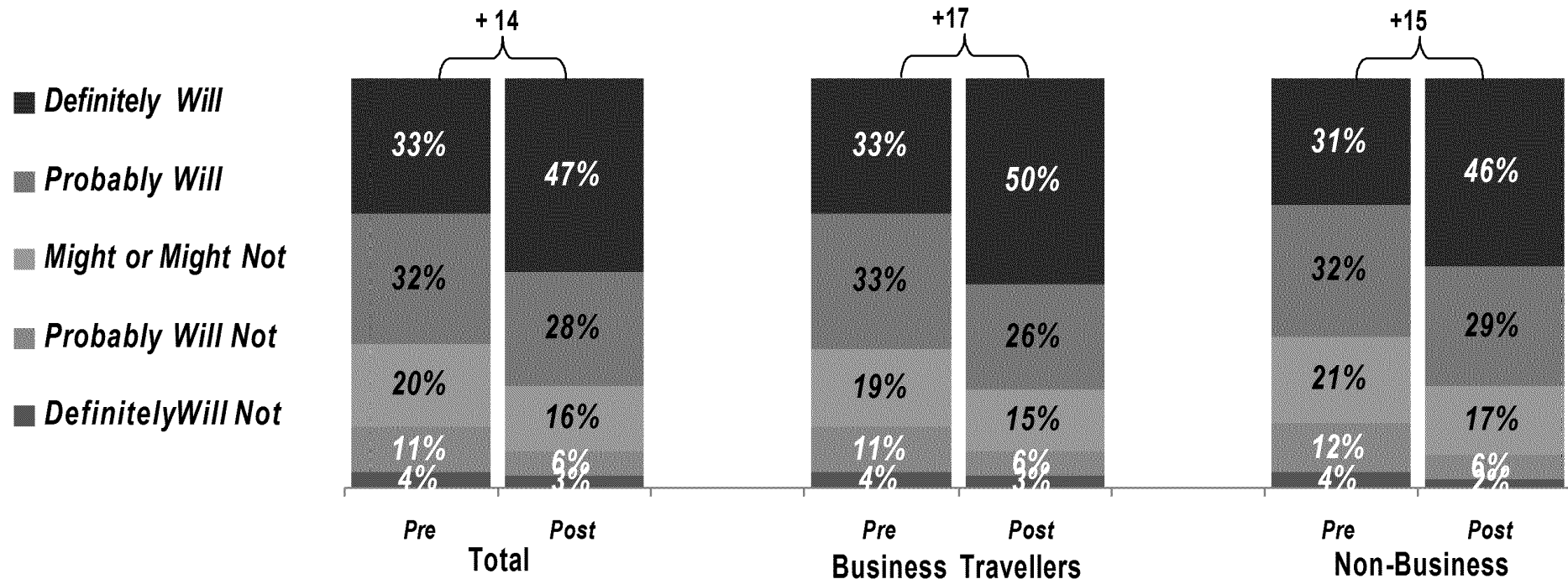
Q54. Of these potential options, please rank the 3 options you find most important, where 1 is the option you find the most important, 2 is the option you find the second most important, and 3 is the option you find the third most important.

Impact of Amenities on Likelihood to Use the ARL

- After ranking their top 3 amenities, respondents were then asked, if those 3 amenities were part of the ARL, how likely they would now be to use the ARL.
- As can be seen from the results below, the impact of the inclusion of these amenities is dramatic, suggesting that Metrolinx should pursue the inclusion of these items, as they are not just seen as 'nice to have,' but could increase ridership.

Impact of Amenities on Likelihood to Use ARL

Base: GTHA Residents



Q56. Earlier, you mentioned that you (INSERT RESPONSE FROM Q15) use the ARL to travel into or out of Pearson Airport. If the ARL had the following amenities (TOP 3 FROM Q54), how likely would you be to use the ARL? *Note: This question was only asked of GTHA residents.

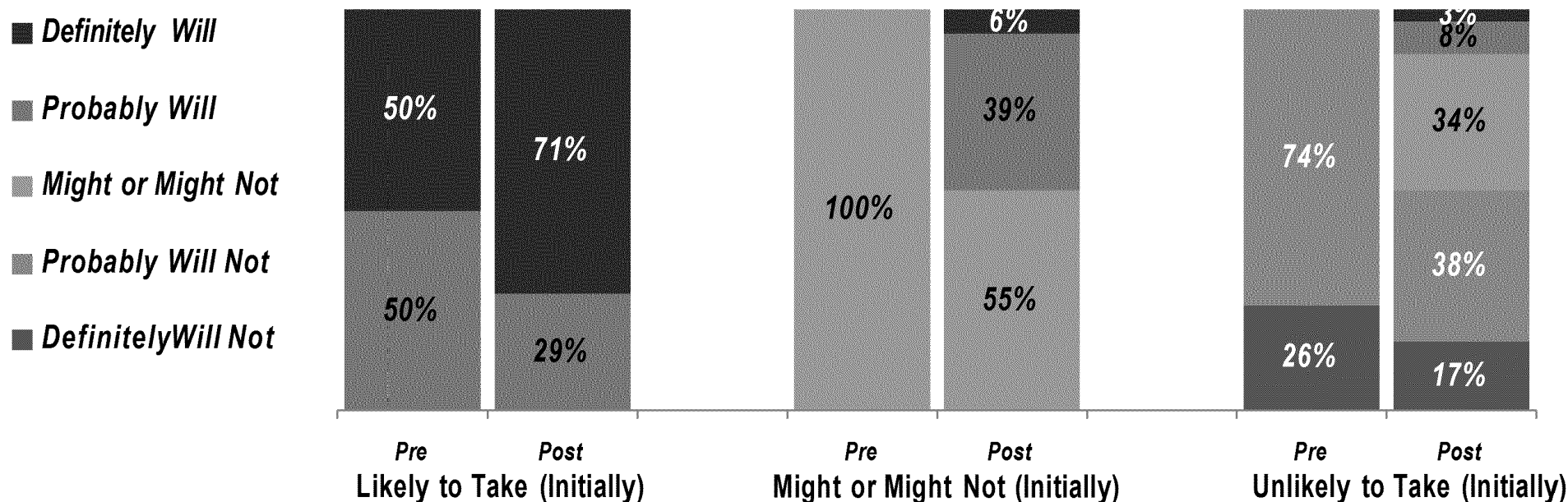
Impact of Amenities on Likelihood to Use the ARL

- By Likelihood to Use ARL

‰ The inclusion of amenities not only will make those who already are interested in taking the ARL more interested, but also have the capability to shift rejecters to potential riders.

Impact of Amenities on Likelihood to Use ARL

Base: GTHA Residents

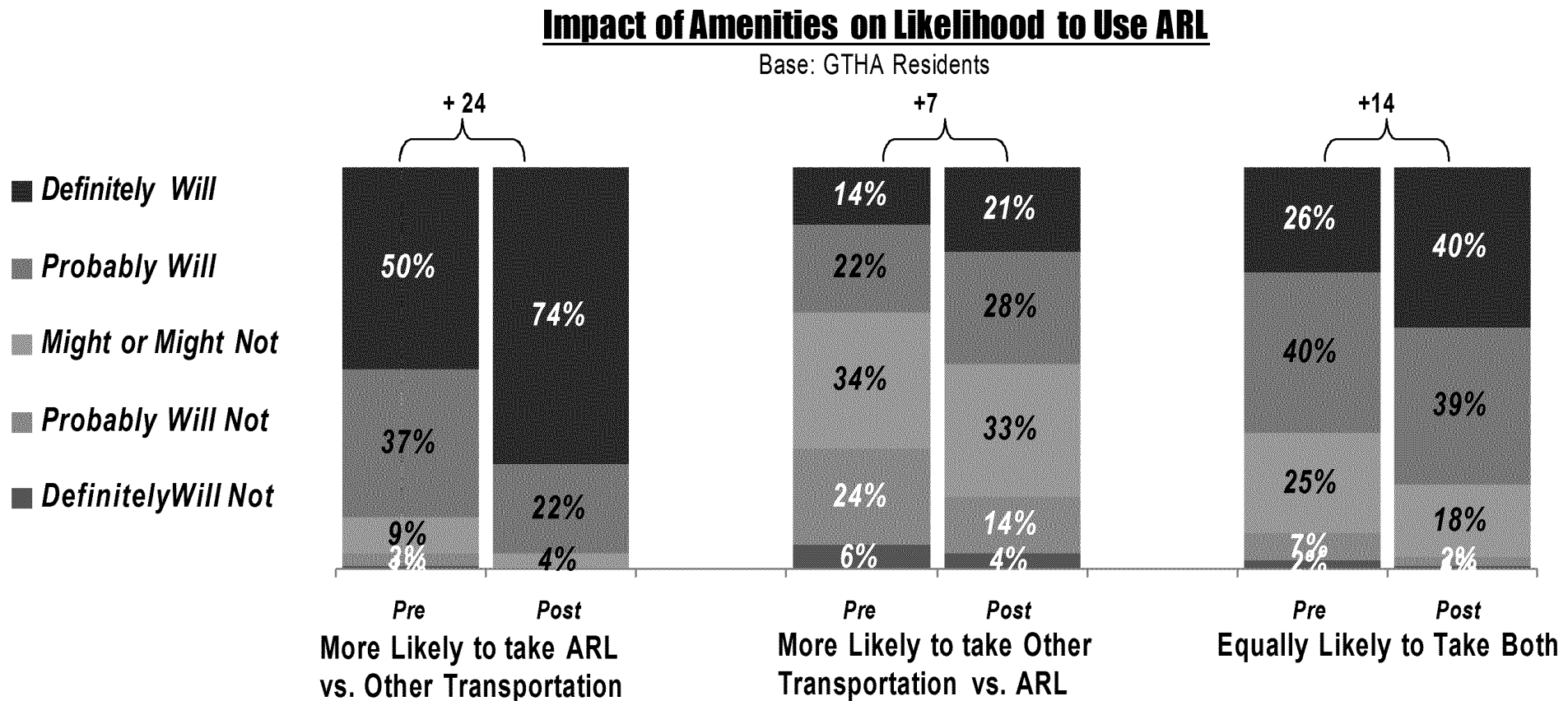


Q56. Earlier, you mentioned that you (INSERT RESPONSE FROM Q15) use the ARL to travel into or out of Pearson Airport. If the ARL had the following amenities (TOP 3 FROM Q54), how likely would you be to use the ARL? *Note: This question was only asked of GTHA residents.

Impact of Amenities on Likelihood to Use the ARL

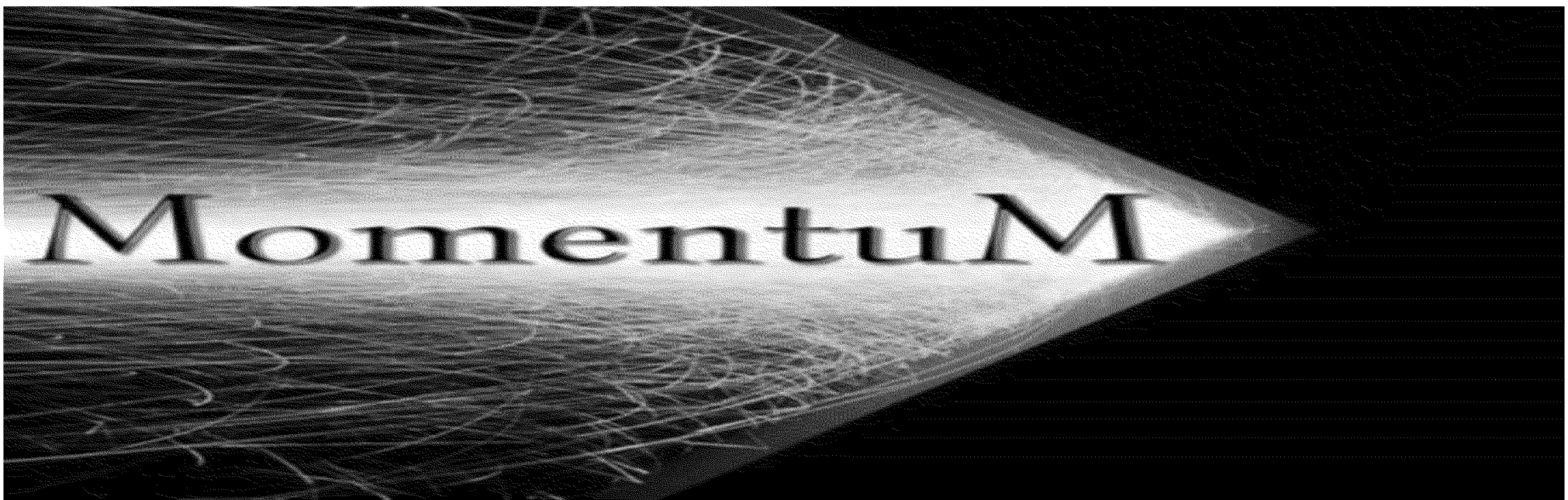
- By Likelihood to Use ARL vs. Other Transportation Modes

Furthermore, these amenities have the potential to improve the likelihood of taking the ARL among those who are 'on the fence' regarding preference of ARL vs other transportation options.



Q56. Earlier, you mentioned that you (INSERT RESPONSE FROM Q15) use the ARL to travel into or out of Pearson Airport. If the ARL had the following amenities (TOP 3 FROM Q54), how likely would you be to use the ARL? *Note: This question was only asked of GTHA residents.

IMPLICATIONS & CONSIDERATIONS



Awareness and appeal of the ARL is high. The ARL is seen as more than just an A-to-B rail service: it is seen as benefiting not only the individual, but the city and the airport. Metrolinx needs to keep up the positive momentum.

In order to do this, Metrolinx should:

- TM continue communicating the key benefits and reasons to believe
- TM keep a consistent message
- TM be as transparent as possible: address both the good and the bad
- TM consider creating communities – both actual and within social media platforms – to be ambassadors

Clearly there is excitement and high expectations around the service. With this comes the need to meet these expectations.



Nearly all GTHA residents leave from, and return to, their home when travelling. Place of work, as the point of departure, is limited.

This will impact communications and advertising strategies (and possibly logistics).

Metrolinx will need to build a compelling story that incorporates this insight, either in terms of messaging or even visuals. Or... attempt to change behaviour by reframing the work place as a point of departure (as Porter has successfully done).

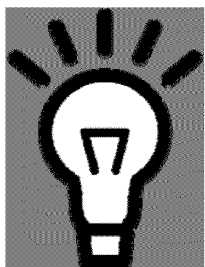
Furthermore, TTC would be the number one way GTHA residents would to get to their preferred ARL station.

Given its connection along the subway line, this is one of the reasons why Bloor Station is emerging as a more popular than anticipated station.

This means a feeder strategy will be crucial. Most travellers will have baggage with them – how will the TTC accommodate this?

Exclusion per Committee Direction

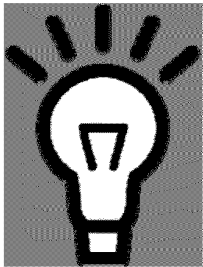
Exclusion per Committee Direction



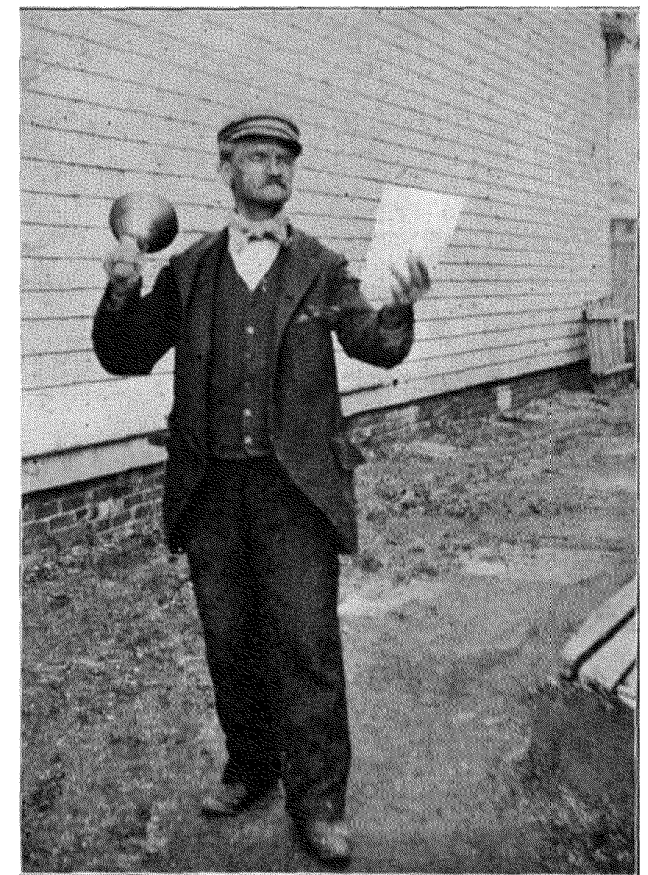
Would it be possible to provide a designated ARL shuttle bus (similar to what is currently provided by Porter Airlines) within a specific kilometer radius to the key access/egress points? GO Buses currently have capacity for luggage, and would be perfectly suited to this task – just re-brand for the ARL.

Messaging Strategies – Some Suggestions

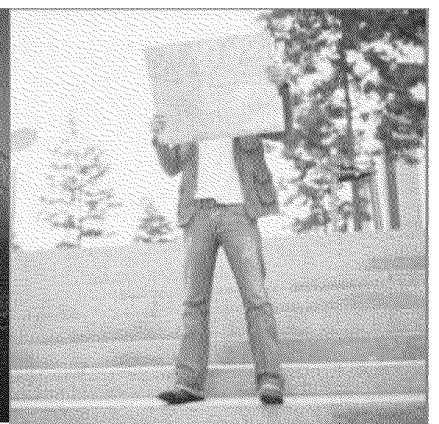
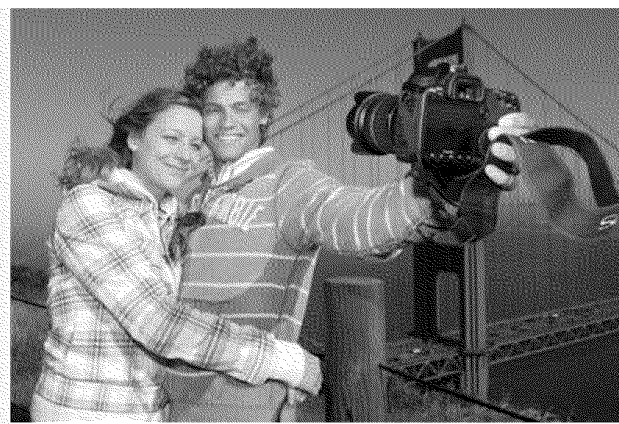
Traffic jams are a clear pain point for those travelling to and from the airport. Out of a person's control, traffic jams create unneeded stress and anxiety. Service consistency is an excellent point of differentiation for the ARL, and one that should be harnessed and communicated against.



Emphasize the **speed and convenience** of the ARL. Given that the ARL is still in the development phase, it is not surprising that travellers are more cautious of their perceptions of the ARL as the best or fastest way to the airport. However, it will be concerning if these doubts continue, and Metrolinx should consider communication that is designed to address these concerns directly.

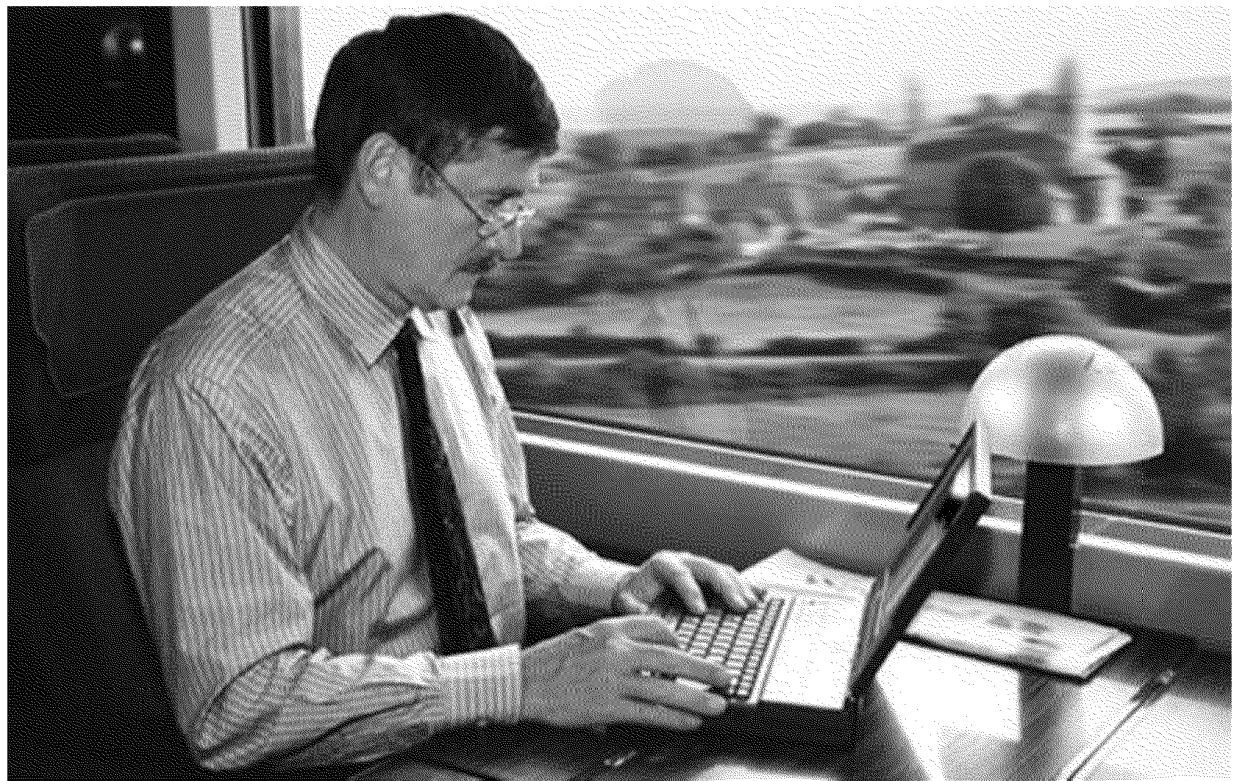


Exclusion per Committee Direction



Awareness Building: Non-GTHA Residents

While awareness is fairly low among non-Ontario residents, interest is very high. It may be worth it to get ahead of the curve, and begin raising awareness of the upcoming service. As many of those who fly into Toronto do so on a semi-regular basis (about twice per year), it may be worth-while to place advertisements in Pearson terminals, include articles in in-flight magazines, etc. This segment represents a potential excellent opportunity for ARL ridership.



Amenities: More Than Just Nice to Have

The most important amenities (onboard washroom, free Wi-Fi, large luggage racks, onboard displays, etc) are not only are deemed important by travellers, but also have the potential to increase demand for the ARL. This makes these amenities more than just nice to have, but real drivers of ridership.

Therefore, not only is it important to include them in the service, but it will be even more important to communicate the inclusion of these amenities to travellers. These amenities enhance the value of the service.

Exclusion per Committee Direction



Pearson Employees

While overall interest among those working at Pearson Airport is modest, those living in downtown and those in Toronto East, in particular, demonstrate strong likelihood to use the service to commute to work. ☐

Exclusion per Committee Direction

Interest and usage among employees at Pearson Airport may increase once the service is available in 2015, and particularly if it has been seamlessly integrated with the TTC.

Thinking Ahead...

The ARL is off to a tremendous start with considerable positive brand momentum and imagery.

It will be important to track changes in a number of key metrics over time, especially as we near 2015. This will allow Metrolinx to refine messaging and the brand image over time, and course-correct if any issues arise. Some key topics that should be measured over time include:

- ™ Aided and unaided awareness of the ARL;
- ™ Top of mind impressions of the ARL;
- ™ Likelihood to use;
- ™ Perceptions of the ARL

Some additional research opportunities exist, including: a consumer segmentation in order to hone the key target market and determine influential messaging strategies, testing alternative positioning and marketing messages, **Exclusion per Committee Direction** etc.

THANK YOU

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Derived Importance

- ‰ Derived importance measures the degree of influence various factors have on a individual's likelihood to use the ARL in the future.
- ‰ The principle behind 'derived' importance is that what people say is important to them may, and often does differ from what drives their behaviour. The reasons being...
 - Consumers often do not know what is driving their behaviour; and / or
 - Consumers often feel a need to offer what they believe are the desired responses.
- ‰ Derived importance determines the importance of an attribute (e.g. *is modern, is comfortable, would be the fastest way for me to get to the airport, etc.*) by looking at the relationship between that attribute & overall likelihood to take the ARL.
- ‰ The output is a series of correlation coefficients indicating the direction of the relationship (positive or negative) between likelihood to take the ARL and each independent variable, and the relative strength of the relationship.
- ‰ Correlations can range from +1 to -1. A correlation of 0.40 or higher indicates an identifiable relationship. The higher the correlation, the more that variable influences overall impression.



Derived Importance Correlations – Among GTHA Residents

	Total	Business	Non-Business
Is the best option for me to get to the airport (for work)	0.77	0.77	0.77
Is the perfect transportation option for me	0.77	0.75	0.78
Is the best option for me to return (home) from (work at) the airport	0.76	0.75	0.76
Would be the fastest way for me to get to the airport (for work)	0.70	0.72	0.70
Would be the fastest way for me to return (home) from (work at) the airport	0.70	0.71	0.70
Would reduce my travel time	0.67	0.68	0.66
Conveniently located	0.60	0.60	0.60
Will reduce the stress of traveling to or from the airport	0.59	0.57	0.60
Is a transportation method I'm more likely to use when the weather is bad	0.54	0.57	0.52
Will be beneficial to Toronto's economy	0.40	0.41	0.39
Will help improve Toronto's image as a world-class city	0.39	0.36	0.41
Would be comfortable	0.35	0.33	0.35
Would improve the image of Pearson Airport as a world class travel hub	0.35	0.34	0.35
An environmentally friendly option	0.33	0.29	0.34
Would be kid friendly	0.32	0.34	0.31
Is modern	0.31	0.28	0.33
Would provide a real advantage over Toronto Island Airport	0.27	0.34	0.24
Doesn't connect directly to the terminal I typically fly out of/work at	0.03	0.12	0.00
Is disruptive to communities along the route	-0.05	0.03	-0.09
Is too complicated	-0.10	0.05	-0.17



Derived Importance Correlations – Pearson Intercepts

	Total	Business	Non-Business
Is the perfect transportation option for me	0.70	0.78	0.66
Would be the fastest way for me to return (home) from (work at) the airport	0.64	0.65	0.64
Is the best option for me to return (home) from (work at) the airport	0.64	0.69	0.61
Is the best option for me to get to the airport (for work)	0.63	0.75	0.57
Would be the fastest way for me to get to the airport (for work)	0.62	0.64	0.61
Would reduce my travel time	0.54	0.62	0.49
Will reduce the stress of traveling to or from the airport	0.52	0.57	0.49
Conveniently located	0.37	0.47	0.32
Will help improve Toronto's image as a world-class city	0.23	0.28	0.21
Would improve the image of Pearson Airport as a world class travel hub	0.21	0.23	0.21
Would provide a real advantage over Toronto Island Airport	0.21	0.36	0.12
Will be beneficial to Toronto's economy	0.20	0.27	0.15
Would be comfortable	0.17	0.18	0.17
An environmentally friendly option	0.17	0.15	0.18
Is modern	0.16	0.23	0.11
Would be kid friendly	0.15	0.11	0.17
Doesn't connect directly to the terminal I typically fly out of/work at	0.05	-0.05	0.12
Is too complicated	0.02	-0.05	0.06



Derived Importance Correlations – Among Pearson Employees

Q16G - Is the best option for me to get to the airport (for work)	0.80
Q16C - Is the perfect transportation option for me	0.80
Q16H - Is the best option for me to return (home) from (work at) the airport	0.76
Q16F - Would be the fastest way for me to return (home) from (work at) the airport	0.71
Q16E - Would be the fastest way for me to get to the airport (for work)	0.70
Q16R - Would reduce my travel time	0.65
Q16T - Is a transportation method I'm more likely to use when the weather is bad	0.61
Q16I - Will reduce the stress of traveling to or from the airport	0.46
Q16D - Conveniently located	0.40
Q16J - Will help improve Toronto's image as a world-class city	0.39
Q16B - An environmentally friendly option	0.38
Q16P - Would improve the image of Pearson Airport as a world class travel hub	0.35
Q16O - Will be beneficial to Toronto's economy	0.35
Q16A - Is modern	0.32
Q16L - Would be comfortable	0.28
Q16Q - Would provide a real advantage over Toronto Island Airport	0.23
Q16K - Is too complicated	-0.03
Q16N - Doesn't connect directly to the terminal I typically fly out of/work at	-0.08
Q16M - Is disruptive to communities along the route	-0.14



Profile of GTHA Residents

	GTHA Residents (n=4150)	Business Travellers (n=1245)	Non-Business Travellers (n=2905)
Average Age	40.2	40.3	40.2
Gender			
Male	46	59	41
Female	54	41	59
Average # Times Flown Out of Pearson in P12M	3.2	5.7	2.1
Employment			
Employed full time	71	77	69
Employed part time	9	5	11
Self-employed	12	14	11
Student	4	2	5
Salary			
Under \$50,000	18	12	21
\$50,000-\$99,999	37	35	38
\$100,000+	32	41	28
Marital Status			
Married	53	58	51
Single/Never Married	37	32	39
Have Children in Household	23	28	21

Travel Destination Out of Pearson

- Travel out of Pearson is split fairly evenly among travel to an international destination, the U.S., and Canada.
- Non-business travellers are the most likely to travel to an international destination, whereas business travellers tend to travel within the U.S. and Canada.

Travel Destination Out of Pearson (Average)

Base: GTHA Residents



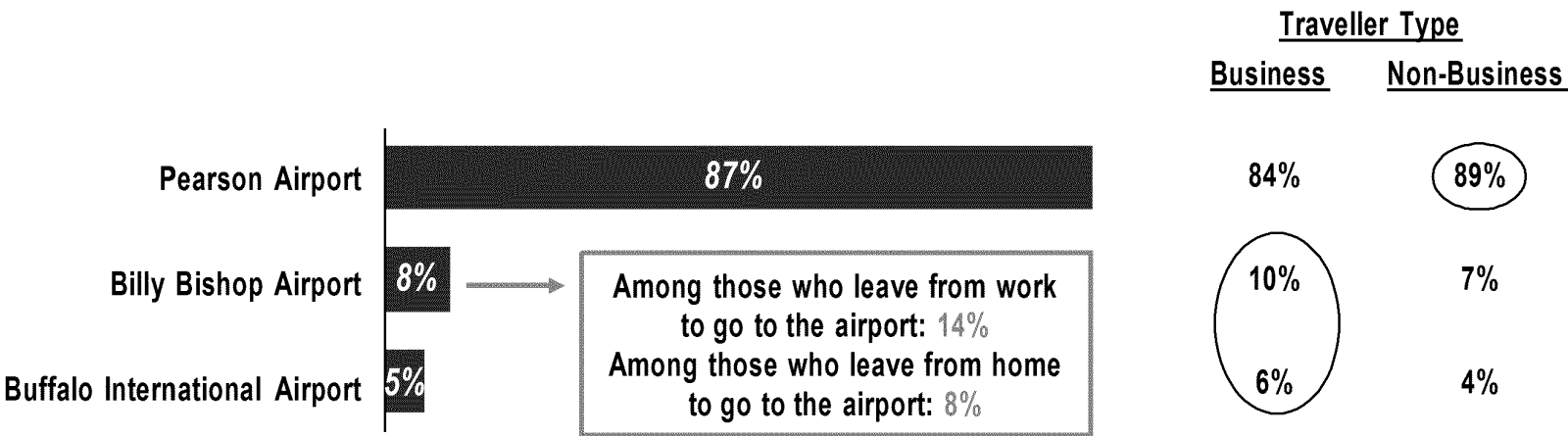
Q57. Thinking about your [BUSINESS/NON-BUSINESS] travel over the past 12 months from Pearson Airport, approximately what percentage of the time were you travelling...?

Airport Usage

- Only a minority of travellers have flown into/out of Billy Bishop Airport within the past 12 months.
- However, among those who tend to leave from their place of work to go to the airport, this percentage nearly doubles.

Airports Flown Into/Out Of in Past 12 Months (Average)

Base: GTHA Residents



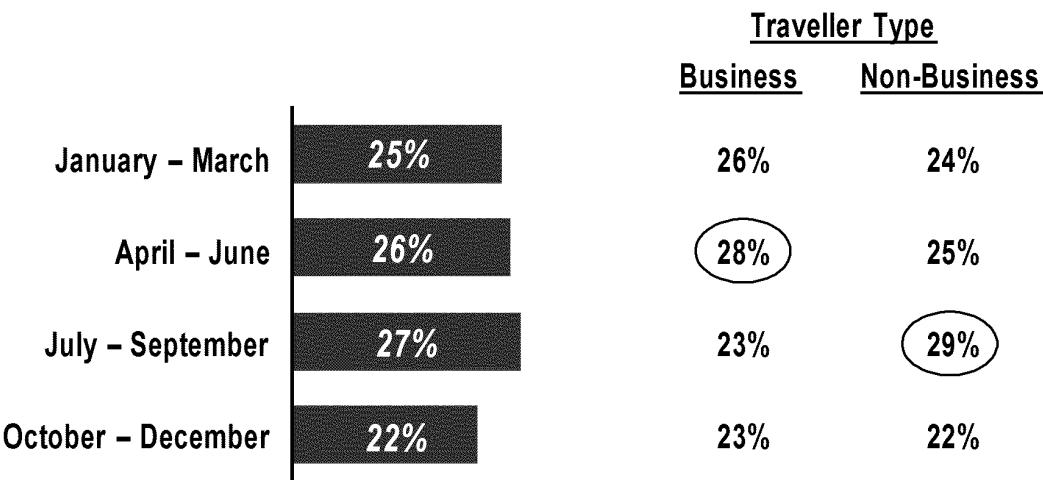
Q75. Thinking about all of your travel over the past 12 months, approximately what percentage of the time did you fly out of...?

Seasonality of Travel

- ‰ Travel generally occurs all year around, although there is a relatively small dip in travel from October to December.
- ‰ Business travellers are slightly more likely to travel from April to June, while Non-Business travellers are most likely to travel between July and September.

Time Frame of Travel Out of Pearson (Average)

Base: GTHA Residents

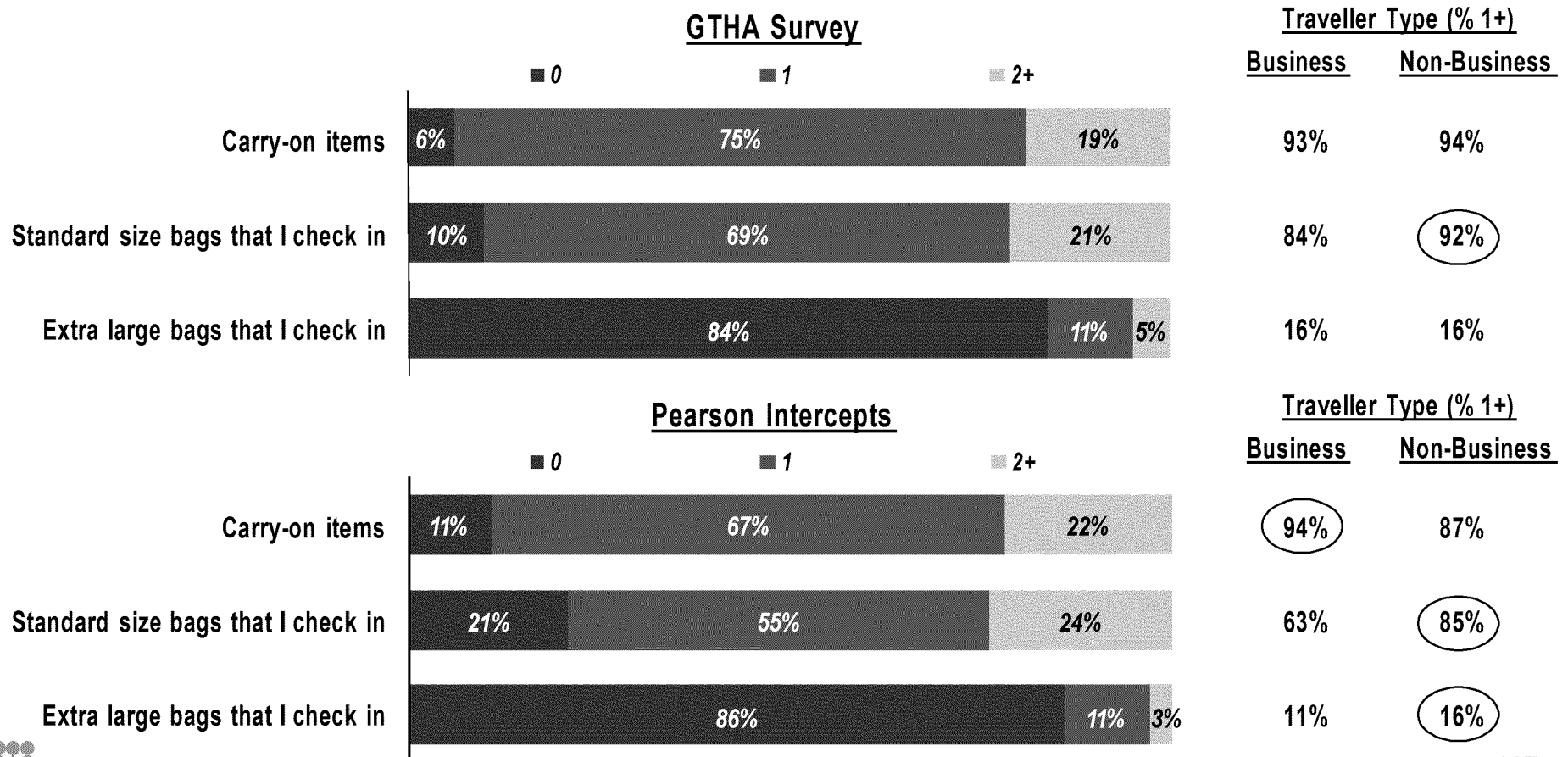


Luggage

- ‰ The majority of both GTHA residents and Pearson Intercepts bring at least one carry-on item and one standard bag.
- ‰ Non-business travellers are more likely than Business travellers to bring a standard bag that they check in; among Pearson Intercepts, Non-Business travellers are also more likely to bring an extra-large bag, and less likely to bring a carry-on item.

Number of Bags Brought Per Trip (Average)

Base: Total



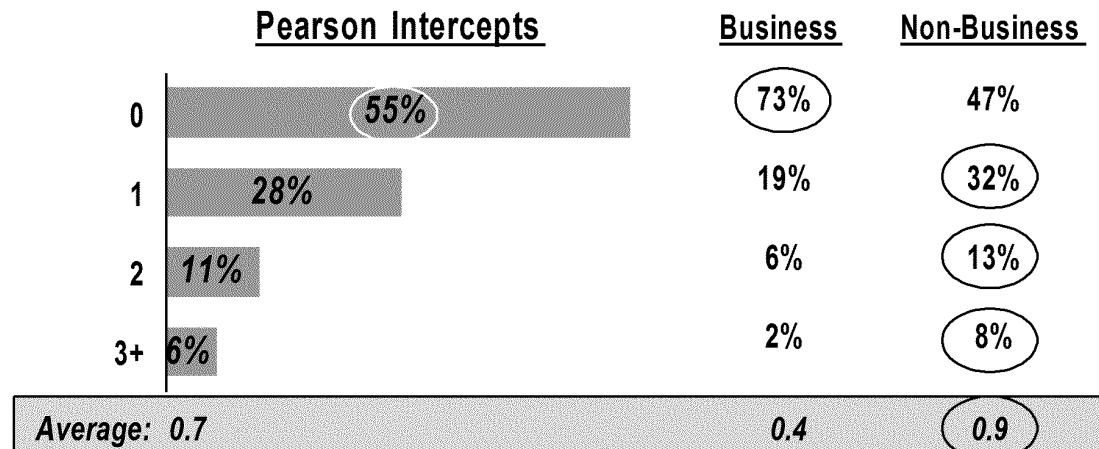
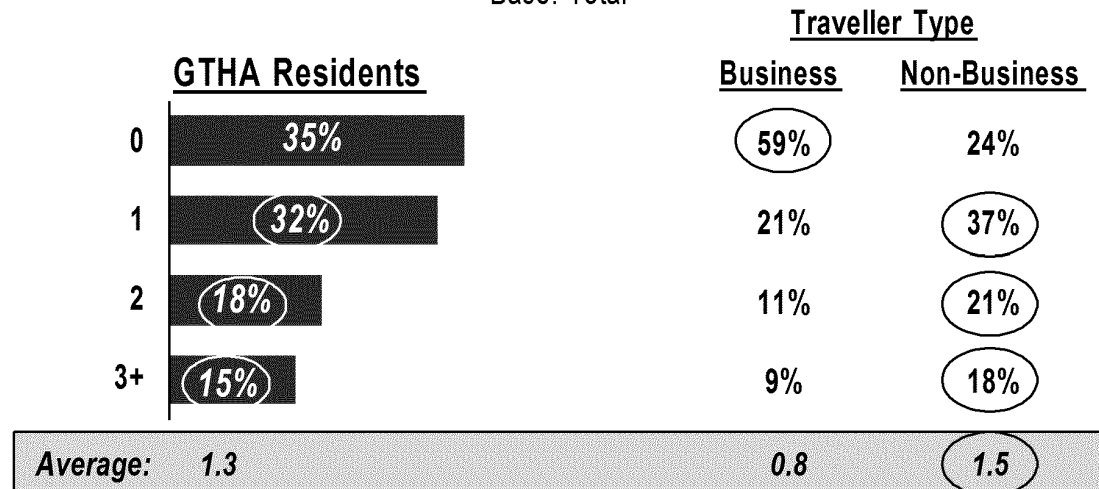
Q59. Thinking about an average [BUSINESS/NON-BUSINESS] into Pearson Airport, approximately how many bags do you, personally, usually bring with you?

Number of People Travel to Airport With

‰ Business travellers, particularly those coming into Toronto for business, tend to fly alone. Nearly three-quarters of GTHA residents, and slightly more than half of non-Ontario residents, fly with at least one companion

Number of People Travel to Airport With

Base: Total



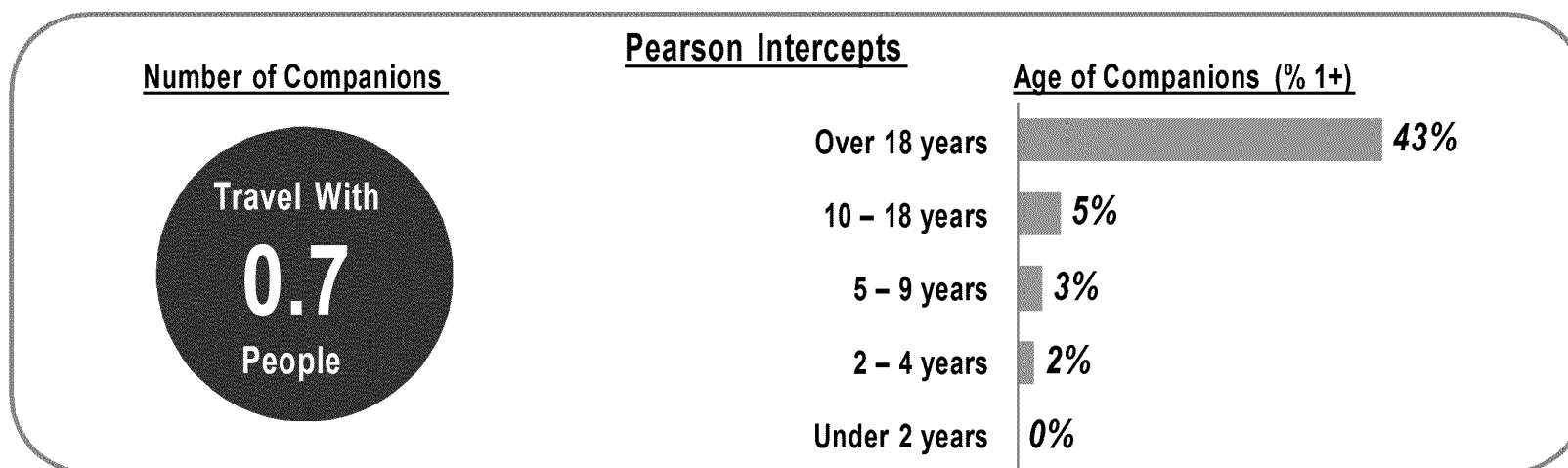
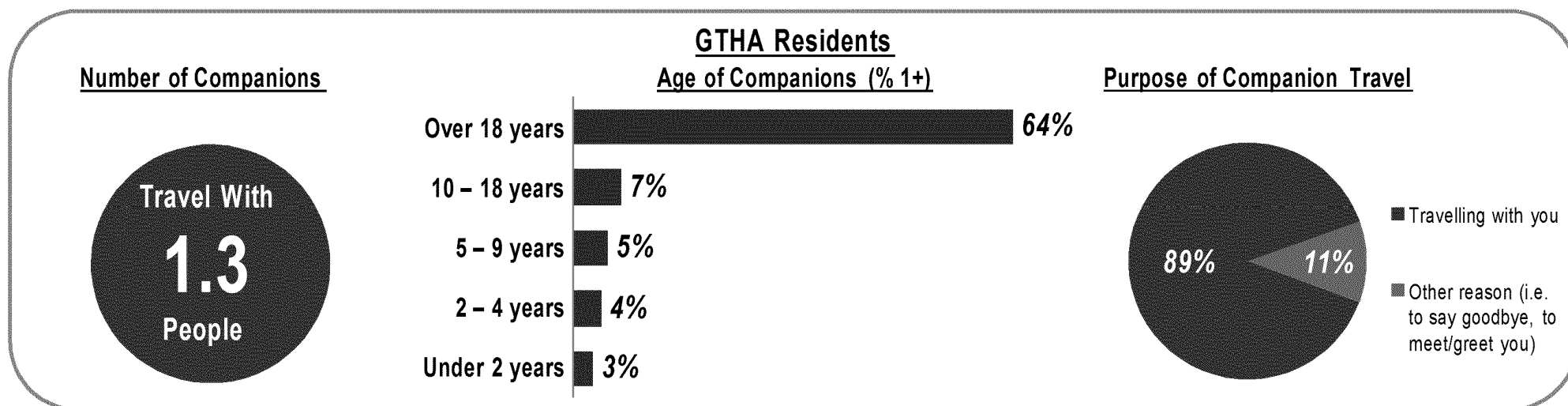
Q60. Thinking about an average [BUSINESS/NON-BUSINESS] into Pearson Airport, approximately how many people travel with you into or out of the airport?

Travel Companion Description

Among those travelling into Pearson Airport with both GTHA residents and Pearson Intercepts, most are over 18 years old.

Travel Companion Description

Base: Total



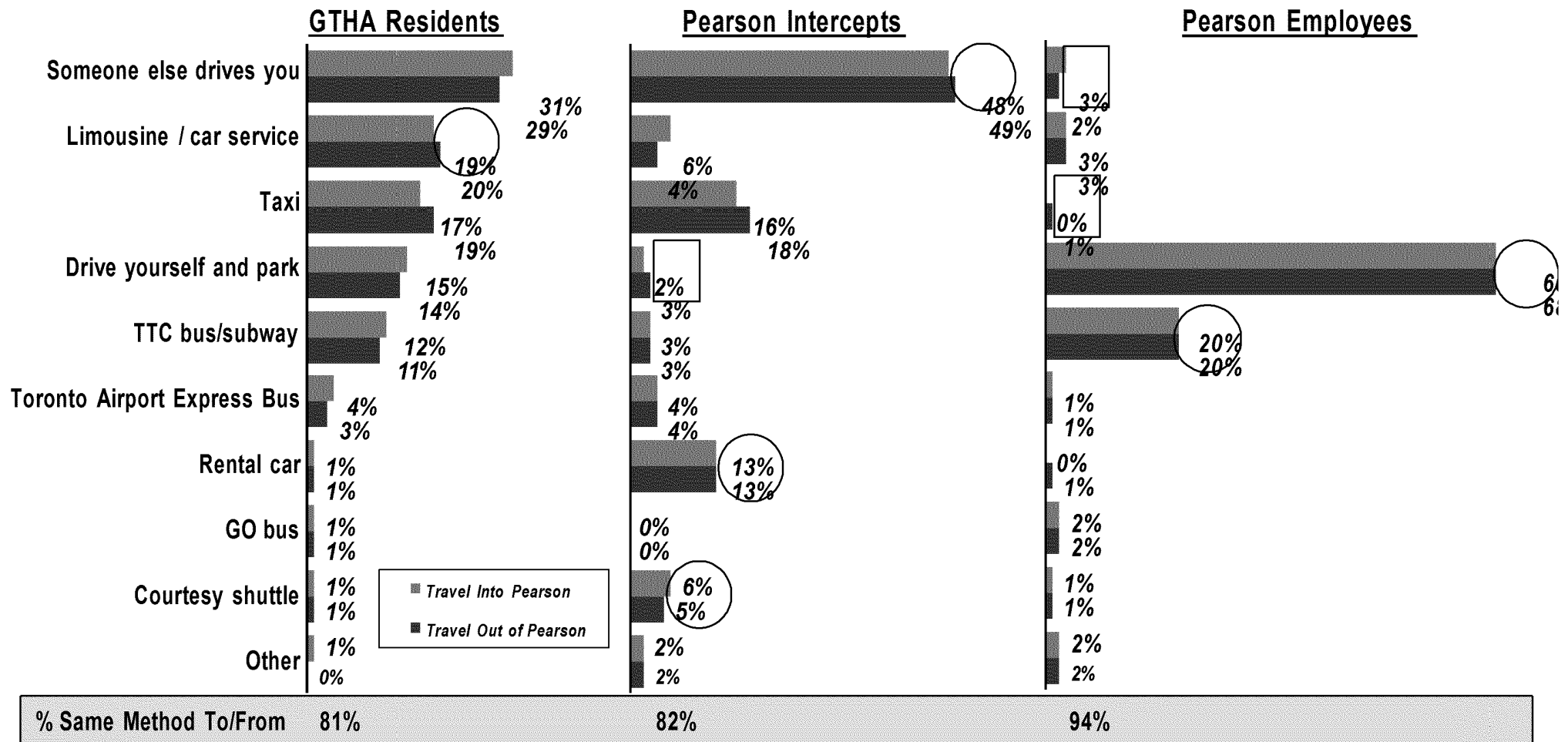
Q61/62. Of the [INSERT] people who travel with you on an average [BUSINESS/NON-BUSINESS] trip into Pearson Airport, how many are...?

Main Method of Travel To/From Pearson

‰ Getting picked up and dropped off by someone else is the most common travel method among GTHA and non-Ontario residents; Employees tend to drive themselves and park at the airport.

Main Method of Travel To/From Pearson

Base: Total



Q10. What is the main way that you travel into Pearson Airport? And what is the main way you travel out of Pearson Airport?

Amount Paid for Travel Into/Out of Pearson – Among GTHA Residents

‰ Among GTHA residents, those travelling from Scarborough, Pickering, and the West spend the most on transportation.

Amount Paid For Travel Into / Out of Pearson (Average)

Base: Among those not driving self or having someone else drive them to/from Pearson

GTHA Residents	Region								
	Downtown Core	Downtown West	Downtown East	Toronto West	Toronto East	Scar- borough	Pickering etc	York	West
<i>Travel Into Pearson</i>	\$41.90	\$39.10	\$33.90	\$37.00	\$48.50	\$57.50	\$73.10	\$47.20	\$58.30
<i>Travel Out of Pearson</i>	\$43.90	\$41.10	\$36.60	\$38.10	\$47.50	\$68.50	\$64.70	\$54.70	\$49.30



Q64. How much do you typically pay for your transportation into Pearson Airport?

Q65: How much do you typically pay for your transportation out of Pearson Airport?

Profile of Pearson Intercept Respondents

	Pearson Intercepts (n=829)	Business Travellers (n=252)	Non-Business Travellers (n=577)
Average Age	39.9	43.1	38.5
Gender			
Male	59	74	53
Female	41	26	47
Average # Times Flown Out of Pearson in P12M	2.8	5.1	1.9
Country of Residence			
Another province in Canada	39	48	35
The United States	31	42	26
Another country	30	10	39



Reasons for Choosing Primary Method of Transportation

- ‰ Travellers take taxis & limos because they are quick, provide access to the terminal, and have an exact time/place for pick-up.
- ‰ Speed (53%) is the primary reason for driving oneself to Pearson, though cost also comes into play when someone else drives them (41%).
- ‰ Main reason for taking the TTC is that it is inexpensive (80%); over half (59%) listed this as their top reason.

Reasons for Choosing Primary Method of Transportation Into / Out of Pearson (% Top 3 Reasons)

Base: GTHA Residents

	Primary Transportation Method Into Pearson						
	Taxi	Limo / Car Service	Drove Self	Someone Else Drove	Airport Express Bus	TTC	Other
<i>Drops me off right in front of the terminal</i>	46%	47%	17%	41%	44%	44%	40%
<i>Quickest</i>	42%	38%	53%	39%	38%	28%	33%
<i>Picks me up at exact time and location specified</i>	46%	60%	22%	35%	29%	14%	21%
<i>Inexpensive</i>	14%	9%	23%	41%	41%	80%	43%
<i>Goes non-stop to the airport</i>	33%	28%	23%	18%	29%	19%	22%
<i>No hassle</i>	26%	27%	28%	22%	19%	15%	23%
<i>Reliable</i>	17%	20%	23%	26%	28%	22%	21%
<i>Convenient location</i>	21%	12%	19%	18%	46%	47%	29%
<i>Comfortable</i>	16%	22%	20%	19%	15%	12%	23%
<i>Provides a private ride</i>	16%	20%	16%	17%	7%	6%	19%

Q67/Q69: People prefer specific methods of transportation for different reasons. Below are a number of different reasons that could be used to describe why a person would choose one type of transportation over another to get to Pearson Airport. Please rank, from the list below, the top 3 reasons you choose [INSERT PRIMARY TRANSPORTATION] as your primary method of transportation into / out of Pearson Airport. 113

Please use the following ranking: 1 is the top reason you choose this method, 2 is the second reason you choose this transportation, and 3 is the third reason.

Top Reasons for Choosing Transportation Method

Among Business travellers, Convenience ('drops me off/picks me up right at the terminal,' 'picks me up at the exact time/location,' and 'quickest') tend to be the top reasons for selecting a transportation method, along with 'inexpensive' for getting a ride with someone else and taking the TTC.

Reasons for Choosing Primary Method of Transportation Into/Out of Pearson (% Top 3 Reasons)

Base: GTHA Business Travellers

Limo/Car Service (26%)



Picks me up at exact time/location: 63% ←
Drops me off right at the terminal: 46%
Quickest: 39%

Taxi (23%)



Drops me off right at the terminal: 48%
Picks me up at exact time/location: 46%
Quickest: 40%

Someone else drove (20%)



Drops me off right at the terminal: 40%
Picks me up at exact time/location: 37%
Inexpensive: 35%

Drive Themselves (16%)



Quickest: 52%
No hassle: 31%
Goes non-stop to airport: 29%

TTC (8%)



Inexpensive: 79% ←
Convenient location: 43%
Drops me off right at the terminal: 42%

Airport Express Bus (3%)



Drops me off right at the terminal: 42%
Convenient location: 41%
Goes non-stop to airport: 40%

Q67/Q69: People prefer specific methods of transportation for different reasons. Below are a number of different reasons that could be used to describe why a person would choose one type of transportation over another to get to Pearson Airport. Please rank, from the list below, the top 3 reasons you choose [INSERT PRIMARY TRANSPORTATION] as your primary method of transportation **into / out of** Pearson Airport. Please use the following ranking: 1 is the top reason you choose this method, 2 is the second reason you choose this transportation, and 3 is the third reason. 114

Top Reasons for Choosing Transportation Method

- ‰ Among Non-Business travellers, 'inexpensive' plays more of a role, including for driving themselves, someone else driving them, taking the Airport Express Bus, and taking the TTC.
- ‰ That said, Convenience factors ('drops me off/picks me up right at the terminal,' 'picks me up at the exact time/location,' and 'quickest') still tend to be the top reasons for selecting a transportation method.

Reasons for Choosing Primary Method of Transportation Into/Out of Pearson (% Top 3 Reasons)

Base: GTHA Non-Business Travellers

Someone else drove (34%)



Inexpensive: 43%
Drops me off right at the terminal: 41%
Quickest: 40%

Limo/Car Service (16%)



Picks me up at exact time/location: 58%
Drops me off right at the terminal: 49%
Quickest: 37%

Taxi (16%)



Picks me up at exact time/location: 46%
Drops me off right at the terminal: 45%
Quickest: 43%

Drive Themselves (14%)



Quickest: 54%
No hassle: 26%
Inexpensive: 25%

TTC (13%)



Inexpensive: 80%
Convenient location: 48%
Drops me off right at the terminal: 45%

Airport Express Bus (3%)



Convenient location: 49%
Inexpensive: 47%
Drops me off right at the terminal: 45%

Q67/Q69: People prefer specific methods of transportation for different reasons. Below are a number of different reasons that could be used to describe why a person would choose one type of transportation over another to get to Pearson Airport. Please rank, from the list below, the top 3 reasons you choose [INSERT PRIMARY TRANSPORTATION] as your primary method of transportation **into / out of** Pearson Airport. Please use the following ranking: 1 is the top reason you choose this method, 2 is the second reason you choose this transportation, and 3 is the third reason.

Reasons for Choosing Primary Method of Transportation

- Employees primarily drive themselves for speed (62%), as do those taking other methods of transportation (56%).
- Employees taking the TTC do so because it is inexpensive (69%), quick (31%), convenient (34%), drops them off at the terminal (37%), and there is no other alternative (35%).

Reasons for Choosing Primary Method of Transportation Into / Out of Pearson (% Top 3 Reasons)

Base: Pearson Employees

	Primary Transportation Method Into Pearson		
	Drove Self	TTC	Other
<i>Quickest</i>	62%	31%	56%
<i>No other alternative</i>	37%	35%	21%
<i>Goes non-stop to the airport</i>	32%	11%	31%
<i>Inexpensive</i>	14%	69%	28%
<i>Reliable</i>	22%	9%	36%
<i>Convenient location</i>	16%	34%	18%
<i>Drops me off right in front of the terminal</i>	7%	37%	28%
<i>Picks me up at exact time and location specified</i>	16%	8%	26%
<i>No hassle</i>	18%	3%	18%
<i>Gives me time to myself</i>	11%	12%	13%
<i>Not subject to traffic jams</i>	8%	15%	15%
<i>Comfortable</i>	12%	2%	13%

Q67/Q69: People prefer specific methods of transportation for different reasons. Below are a number of different reasons that could be used to describe why a person would choose one type of transportation over another to get to Pearson Airport. Please rank, from the list below, the top 3 reasons you choose [INSERT PRIMARY TRANSPORTATION] as your primary method of transportation into / out of Pearson Airport. 116

Please use the following ranking: 1 is the top reason you choose this method, 2 is the second reason you choose this transportation, and 3 is the third reason.

Reasons for Disliking Primary Method of Transportation

- ‰ Traffic jams and costliness are the main reasons for disliking taxis and limos, while traffic jams are the primary cause of concern among those driving, having someone else drive, or taking the bus.
- ‰ In addition to traffic jams, those taking the TTC also dislike the time it takes (43%) and the congestion (48%).

Reasons for Disliking Primary Method of Transportation Into / Out of Pearson (% Top 3 Reasons)

Base: GTHA Residents

	Primary Transportation Method Into Pearson						
	Taxi	Limo / Car Service	Drove Self	Someone Else Drove	Airport Express Bus	TTC	Other
<i>Subject to traffic jams</i>	66%	64%	66%	44%	57%	41%	37%
<i>Too expensive</i>	73%	63%	35%	22%	34%	20%	28%
<i>Takes too much time</i>	16%	16%	22%	21%	38%	43%	24%
<i>Too crowded / congested</i>	6%	5%	11%	10%	14%	48%	20%
<i>Have to take too many forms of transportation</i>	7%	4%	20%	8%	16%	27%	21%
<i>Not enough room for my luggage</i>	9%	5%	7%	10%	11%	27%	17%
<i>Not reliable</i>	13%	6%	7%	10%	11%	16%	14%
<i>Cannot use phone/laptop during trip</i>	8%	8%	24%	8%	6%	9%	11%
<i>Rude personnel</i>	17%	12%	3%	8%	9%	11%	9%
<i>Does not go non-stop to the airport</i>	3%	2%	5%	5%	29%	25%	20%

Q68/Q70: Not every transportation method is perfect. Below are some things that people have mentioned they dislike about the transportation method they use to get to Pearson Airport. Please rank, from the list below, the top 3 aspects that you dislike about [INSERT PRIMARY TRANSPORTATION] **into / out of** Pearson Airport. Please use the following ranking: 1 is the #1 aspect you dislike about this transportation method, 2 is the second-most reason you dislike this method, and 3 is the #3 reason you dislike this transportation method. 117

Top Reasons for Disliking Transportation Method

Among Business travellers, traffic jams is one of the top dislikes for all transportation methods selected. Expensiveness is also mentioned for all methods other than the TTC, while taking too much time is mentioned for all except driving themselves.

Reasons for Disliking Primary Method of Transportation Into/Out of Pearson (% Top 3 Reasons)

Base: GTHA Business Travellers

Limo/Car Service (26%)



Subject to traffic jams: 66%
Too expensive: 59%
Takes too much time: 17%

Taxi (23%)



Too expensive: 73%
Subject to traffic jams: 69%
Takes too much time: 19%

Someone else drove (20%)



Subject to traffic jams: 39%
Too expensive: 28%
Takes too much time: 23%

Drive Themselves (16%)



Subject to traffic jams: 65%
Too expensive: 33%
Cannot use phone/laptop: 29%

TTC (8%)



Too crowded/congested: 39%
Takes too much time: 40%
Subject to traffic jams: 41%

Airport Express Bus (3%)



Subject to traffic jams: 61%
Too expensive: 39%
Takes too much time: 33%

Q68/Q70: Not every transportation method is perfect. Below are some things that people have mentioned they dislike about the transportation method they use to get to Pearson Airport. Please rank, from the list below, the top 3 aspects that you dislike about [INSERT PRIMARY TRANSPORTATION] into / out of Pearson Airport. Please use the following ranking: 1 is the #1 aspect you dislike about this transportation method, 2 is the second-most reason you dislike this method, and 3 is the #3 reason you dislike this transportation method. 118

Top Reasons for Disliking Transportation Method

‰ Traffic jams is one of the top dislikes for all transportation methods selected among non-business travellers. Among those taking a taxi, 'rude personnel' was listed as a dislike, whereas Business travellers were more concerned that it took too much time.

Reasons for Disliking Primary Method of Transportation Into/Out of Pearson (% Top 3 Reasons)

Base: GTHA Non-Business Travellers

Someone else drove (34%)



Subject to traffic jams: 45%
Too expensive: 20%
Takes too much time: 20%

Limo/Car Service (16%)



Too expensive: 67%
Subject to traffic jams: 64%
Takes too much time: 15%

Taxi (16%)



Too expensive: 73%
Subject to traffic jams: 63%
Rude personnel: 19%

Drive Themselves (14%)



Subject to traffic jams: 66%
Too expensive: 36%
Not dropped off directly at terminal: 29%

TTC (13%)



Too crowded/congested: 47%
Takes too much time: 44%
Subject to traffic jams: 42%

Airport Express Bus (3%)



Subject to traffic jams: 55%
Takes too much time: 40%
Too expensive: 31%

Q68/Q70: Not every transportation method is perfect. Below are some things that people have mentioned they dislike about the transportation method they use to get to Pearson Airport. Please rank, from the list below, the top 3 aspects that you dislike about [INSERT PRIMARY TRANSPORTATION] **into / out of** Pearson Airport. Please use the following ranking: 1 is the #1 aspect you dislike about this transportation method, 2 is the second-most reason you dislike this method, and 3 is the #3 reason you dislike this transportation method. 119

Reasons for Disliking Primary Method of Transportation

- Employees driving themselves mainly dislike the fact that they are subject to traffic jams (72%), as do those who take other forms of transportation (54%).
- Employees taking the TTC mainly dislike that it is crowded (51%) and takes too much time (51%).

Reasons for Disliking Primary Method of Transportation Into / Out of Pearson (% Top 3 Reasons)

Base: Pearson Employees

	Primary Transportation Method Into Pearson		
	Drove Self	TTC	Other
<i>Subject to traffic jams</i>	72%	15%	54%
<i>Takes too much time</i>	30%	51%	46%
<i>Too expensive</i>	39%	6%	28%
<i>Cannot use phone/laptop during trip</i>	30%	3%	0%
<i>Too crowded / congested</i>	9%	51%	23%
<i>Have to take too many forms of transportation</i>	14%	34%	21%
<i>Does not go non-stop to the airport</i>	4%	34%	18%
<i>Not reliable</i>	3%	34%	10%
<i>Does not drop me off at terminal / destination</i>	11%	3%	5%
<i>Not enough room for my luggage</i>	0%	23%	10%

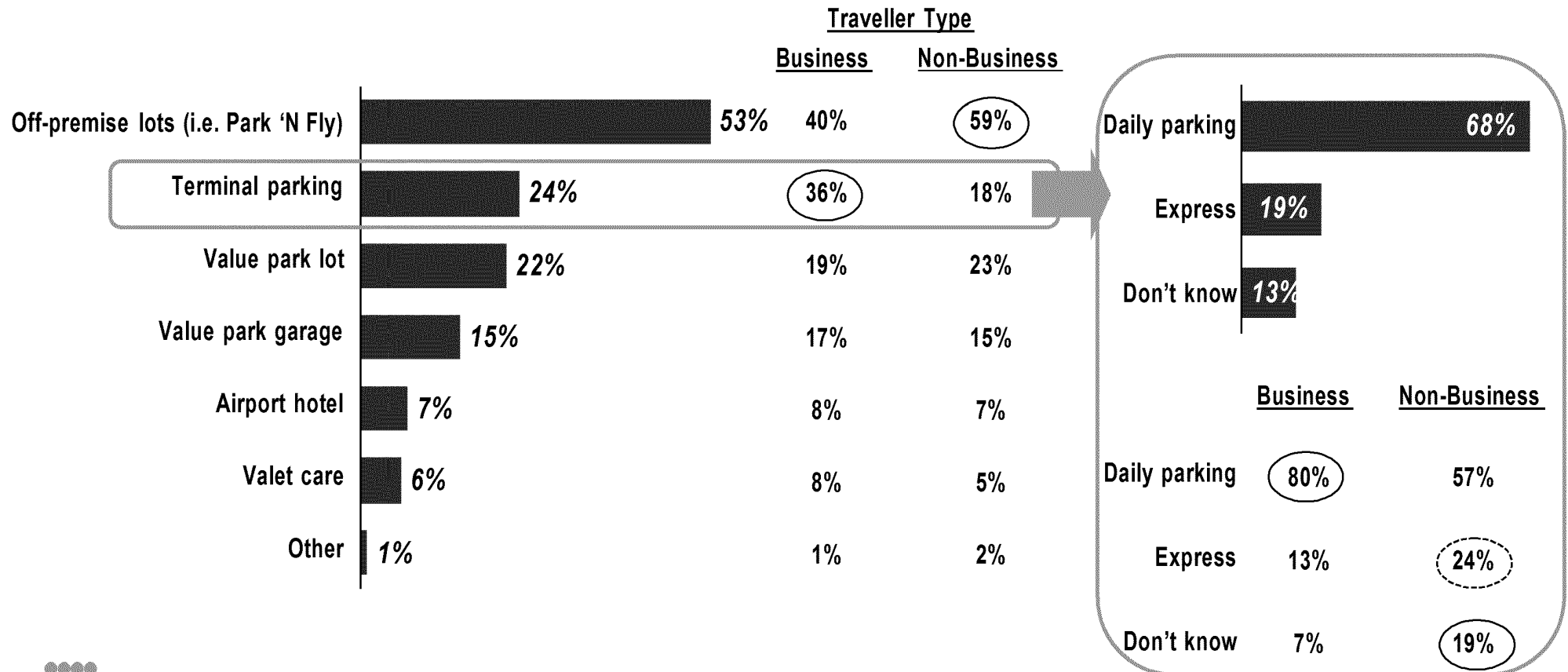
Q68/Q70: Not every transportation method is perfect. Below are some things that people have mentioned they dislike about the transportation method they use to get to Pearson Airport. Please rank, from the list below, the top 3 aspects that you dislike about [INSERT PRIMARY TRANSPORTATION] **into / out of** Pearson Airport. Please use the following ranking: 1 is the #1 aspect you dislike about this transportation method, 2 is the second-most reason you dislike this method, and 3 is the #3 reason you dislike this transportation method. 120

Parking Location at Pearson

- Off-premise parking lots such as Park 'N Fly are the most common parking location among travellers who drive themselves to Pearson, particularly among Non-Business travellers.
- Business travellers more likely than Non-Business travellers to park in Terminal parking.

Parking Location at Pearson

Base: GTHA residents who drive themselves to/from Pearson



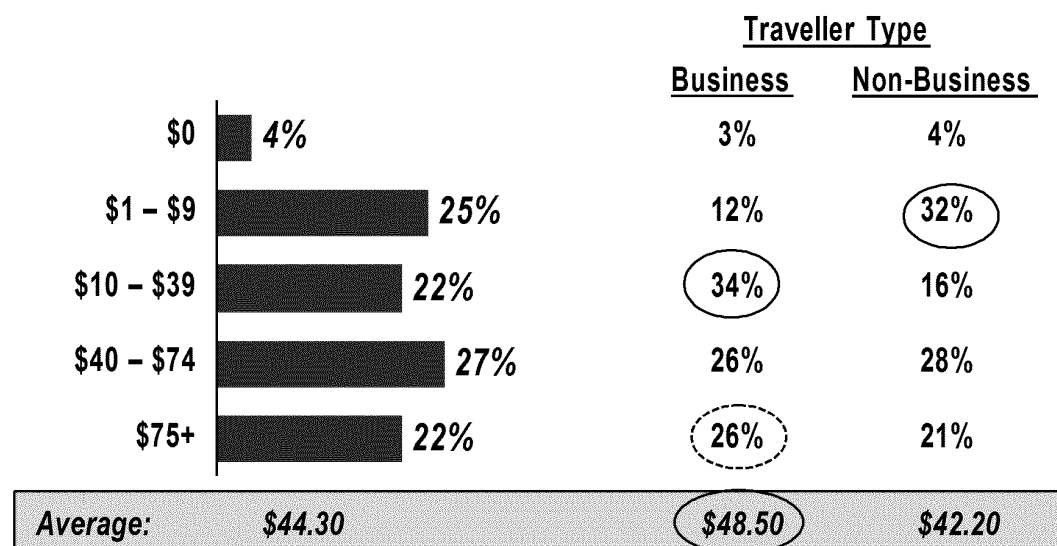
Q71. Which parking option do you usually select when you drive yourself to Pearson Airport? Please select all that apply. Q72. And at the terminal, do you park in the Express or Daily parking lot

Amount Paid for Parking

- ‰ Travellers who park pay on average \$44.30, though Business travellers pay more (\$48.50).
- ‰ Those who park with Valet Care pay somewhat more on average for their parking (\$54.20).

Amount Paid for Parking

Base: GTHA Residents



% Reimbursed as Business Expense
(Among Business Travellers)
GTHA Survey: 75%

	Parking Location					
	Off-Premise	Terminal	Value Lot	Value Garage	Airport Hotel	Valet Care
Average:	\$43.80	\$43.60	\$43.50	\$44.60	\$44.70	\$54.20



Q73. How much do you typically pay for parking?

Q74: Are you reimbursed this amount as a travel expense?

Likelihood to Use the ARL - Profile (GTHA Residents)

‰ Those GTHA residents who are most likely to use the ARL tend to be younger and take less expensive transportation methods (such as taxi or public transit) to the airport.

	Total (n=4150)	Likely to Use ARL (T2B) (n=2675)	Unlikely to Use ARL (B2B) (n=632)
Average Age	40.2	38.9	44.9
Gender			
Male	46	46	47
Female	54	54	53
Average # Times Flown Out of Pearson in P12M	3.2	3.3	3.2
Average % of Travel is for Business	21	21	23
Average % of Travel is for Non-Business	79	79	77
Method of Travel When Going to Pearson			
Someone else drove you	31	29	34
Limo/car service	19	18	22
Taxi	17	19	11
Drove self and parked	15	13	21
TTC	12	14	8
Toronto Airport Express Bus	4	5	1
Amount Paid for Travel To/From Pearson	\$42.90	\$42.65	\$47.20



Likelihood to Use the ARL - Profile (GTHA Residents)

‰ Likely users of the ARL have a slightly lower annual salary and are more likely to be single compared with those GTHA residents who are unlikely to use the ARL.

	Total (n=4150)	Likely to Use ARL (T2B) (n=2675)	Unlikely to Use ARL (B2B) (n=632)
% of Time Flown Out Of...			
Pearson Airport	87	86	91
Billy Bishop Airport	8	9	4
Buffalo Airport	5	5	5
Income			
Under \$50,000	18	20	12
\$50,000 - \$99,999	37	39	32
\$100,000+	32	29	40
Marital Status			
Single	37	40	27
Married	53	52	61
Widowed	2	1	3
Divorced	8	7	10



Likelihood to Use the ARL - Profile (GTHA Residents)

‰ Likely users of the ARL are most likely to live or work in downtown Toronto, whereas those who are unlikely to use the ARL live or work in the outskirts of the city.

	Total (n=4150)	Likely to Use ARL (T2B) (n=2675)	Unlikely to Use ARL (B2B) (n=632)
Catchment Region			
Downtown Core	16	17	10
Downtown West	22	25	13
Downtown East	14	17	7
Toronto West	13	11	17
Toronto East	18	18	18
Scarborough	2	2	4
Pickering/Whitby/Oshawa	7	5	14
York Region	4	3	6
West (Hamilton/Halton/Peel)	4	2	10



Likelihood to Use the ARL - Profile (GTHA Residents)

While there is no difference in likelihood to use the ARL by awareness, those who are likely to use the service are more likely to have heard of it through word-of-mouth or the Internet.

	Total (n=4150)	Likely to Use ARL (T2B) (n=2675)	Unlikely to Use ARL (B2B) (n=632)
% Previously Aware of ARL	65	66	64
How Became Aware of ARL			
Newspaper Report	55	55	57
Television Report	42	42	42
Word of Mouth	34	37	24
Internet	25	27	21
TV Advertisement	7	8	6
Magazine Report	6	7	4
Radio	4	4	5



Likelihood to Use the ARL - Profile (Pearson Intercepts)

Non-residents of Ontario who are frequent flyers into Pearson or who rent their own cars are less likely to be interested in taking the ARL.

	Total (n=829)	Likely to Use ARL (T2B) (n=516)	Unlikely to Use ARL (B2B) (n=138)
Average Age	39.9	39.8	40.9
Gender			
Male	59	63	59
Female	41	37	41
Average # Times Flown Out of Pearson in P12M	2.8	2.7	3.9
Average % of Travel is for Business	29	28	36
Average % of Travel is for Non-Business	71	72	64
Method of Travel When Going to Pearson			
Someone else drove you	48	42	53
Taxi	16	18	11
Rental car	13	13	21
Courtesy shuttle	6	8	3
Limo/car service	6	6	4
Toronto Airport Express Bus	4	6	1
Amount Paid for Travel To/From Pearson	\$65.40	\$57.20	\$91.70

Likelihood to Use the ARL - Profile (Pearson Intercepts)

Furthermore, those who are unlikely to be interested in the ARL are more likely to come from another province in Ontario, compared with those who are likely to use the ARL.

	Total (n=829)	Likely to Use ARL (T2B) (n=516)	Unlikely to Use ARL (B2B) (n=138)
Country of Residence			
Another province in Canada	39	37	46
The United States	31	32	30
Another Country	30	31	24
% Previously Aware of ARL	13	13	19
Number of People Typically Travel With			
Zero – travel alone	55	54	60
Travel with one other person	28	29	24
Travel with 2+ people	17	17	16
Method of Travel To/From Home Airport			
Someone drives you/picks you up	52	51	47
You drive yourself	26	25	31
Taxi	22	24	17
Limo/car service	6	7	6



Likelihood to Use the ARL - Profile (Pearson Employees)

‰ Approximately 8-in-ten of those who are unlikely to use the ARL to commute to work currently drive themselves. While about half of those who are likely to use the ARL also drive themselves, a further one-third take the TTC.

	Total (n=323)	Likely to Use ARL (T2B) (n=134)	Unlikely to Use ARL (B2B) (n=124)
Average Age	43.5	43.5	44.0
Gender			
Male	73	73	71
Female	27	27	29
Method of Travel When Going to Pearson			
Drove self and parked	68	51	81
TTC	20	30	13
Limo/car service	3	8	1
Someone else drove you	3	3	2
Go Bus	2	4	1



Likelihood to Use the ARL - Profile (Pearson Employees)

‰ Region appears to be one of the key drivers of likelihood to use the ARL, with those living in the downtown core or towards the east (Beaches, Scarborough, etc), whereas over half of those who are unlikely to use the ARL for commuting to work live in the west end.

	Total (n=323)	Likely to Use ARL (T2B) (n=134)	Unlikely to Use ARL (B2B) (n=124)
Catchment Region			
Downtown Core	4	7	2
Downtown West	11	13	9
Downtown East	3	5	2
Toronto West	18	17	20
Toronto East	15	22	7
Scarborough	4	7	--
Pickering/Whitby/Oshawa	3	4	2
York Region	5	4	6
West (Hamilton/Halton/Peel)	37	20	52



Likelihood to Use the ARL - Profile (Pearson Employees)

‰ There are very few differences on likelihood to take the ARL based on day and time of commuting to and from work.

	Total (n=323)	Likely to Use ARL (T2B) (n=134)	Unlikely to Use ARL (B2B) (n=124)
Time Typically Leave for Work			
Before 6:00am	28	28	29
Between 6:01- 8:00 am	42	43	41
Between 8:01am-12:00pm	14	16	14
Between 12:01pm-6:0pm	12	11	9
After 6:00pm	4	2	7
Time Typically Leave Work to Return Home			
Before 12:00pm	13	9	15
Between 12:01-4:00pm	19	19	23
Between 4:01-6:00pm	35	32	37
Between 6:01-8:00pm	12	12	11
Between 8:01-10:00pm	10	13	8
After 10:00pm	12	15	7



Likelihood to Use the ARL - Profile (Pearson Employees)

	Total (n=323)	Likely to Use ARL (T2B) (n=134)	Unlikely to Use ARL (B2B) (n=124)
Days Typically Work at Pearson			
Monday	90	87	94
Tuesday	89	87	90
Wednesday	91	88	91
Thursday	93	89	94
Friday	94	90	96
Saturday	46	48	43
Sunday	44	44	41



Likelihood to Use the ARL - Profile (Pearson Employees)

‰ Those who are unlikely to take the ARL for work purposes are slightly more likely than those open to using the ARL to have previously heard of the ARL.

	Total (n=323)	Likely to Use ARL (T2B) (n=134)	Unlikely to Use ARL (B2B) (n=124)
% Previously Aware of ARL	85	79	92
How Became Aware of ARL			
Newspaper Report	55	58	54
Word of mouth	52	54	49
Television report	32	34	30
Internet	23	24	25
Work	11	4	17
Magazine Report	6	6	8

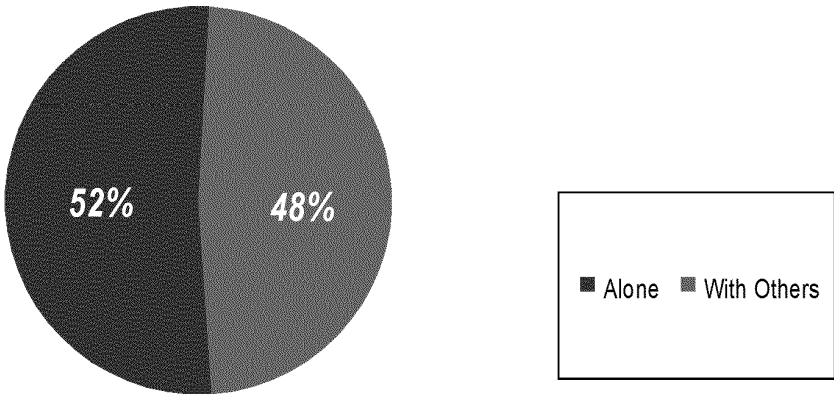


Take ARL Alone or With Others

‰ There is a fairly even split between those who would most likely take the ARL alone and those who would take it with others. Business travellers and older travellers are more likely to take the service alone.

Take ARL Alone or With Others

Base: GTHA Residents



	Traveller Type		Age				Gender	
	Business	Non-Business	18-34	35-44	45-54	55+	Male	Female
% Take ARL alone	67	46	50	51	55	57	53	52

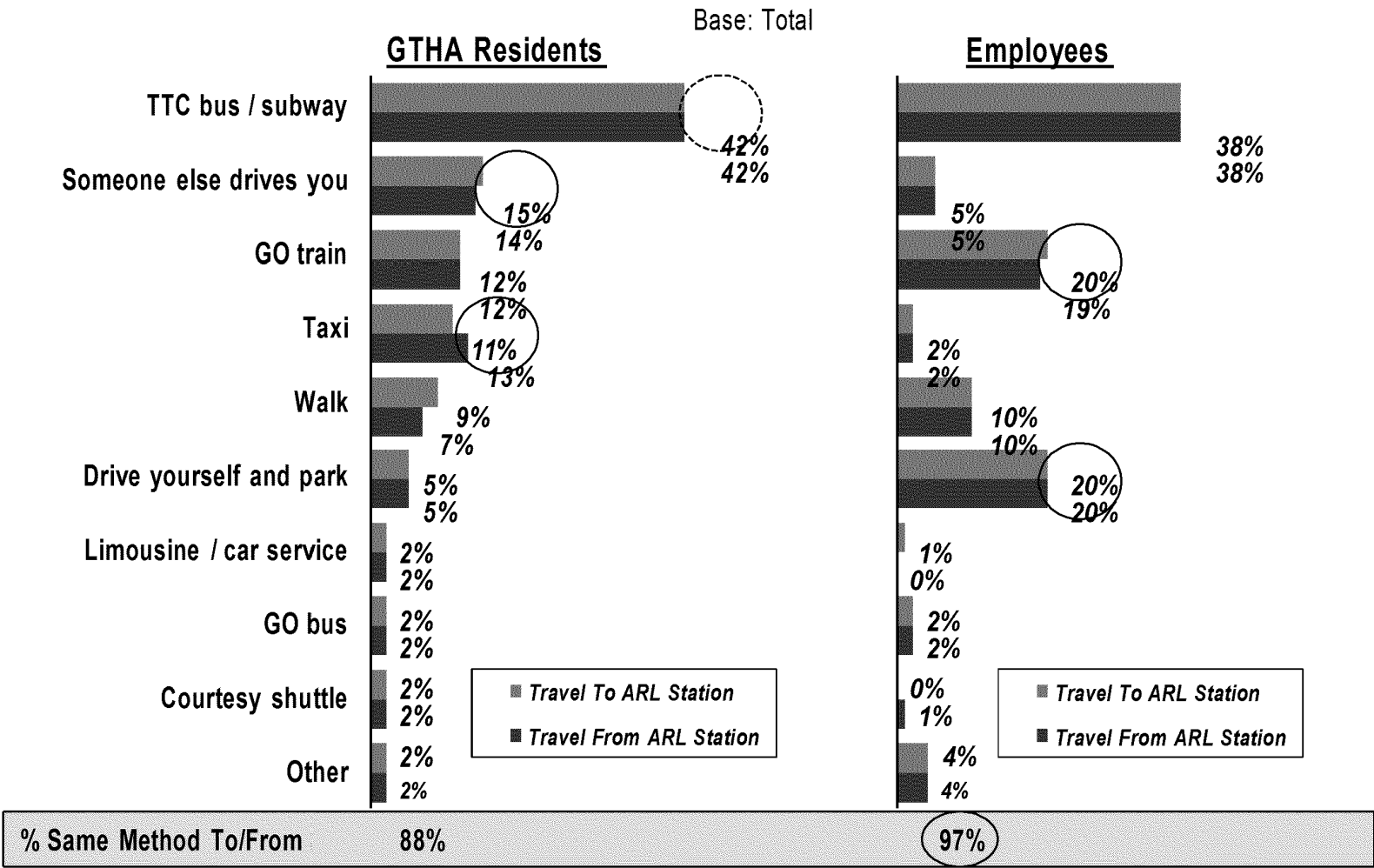


Q48. Would you most likely take the ARL alone or with others?
 * Note: this question was asked only to GTHA residents.

Main Method of Travel To/From Subway Station

‰ The TTC would be the most commonly used transportation method to get to and from a traveller’s preferred ARL departure station, particularly among GTHA residents.

Main Method of Travel To/From Preferred ARL Station



Q18. How do you anticipate you would get to [INSERT STATION] when taking the ARL from this point? And how do you anticipate you would get from [INSERT STATION] to your final destination when returning home from Pearson Airport via the ARL? 135

Perceptions of the ARL – By Sample Type

‰ When comparing reactions to the ARL between the three different groups, an interesting trend emerges: GTHA residents are the least likely (relatively – scores are still strong among this segment) to believe that the ARL will improve perceptions of Toronto and Pearson Airport, specifically.

% Rating 8-10 (1=Does Not Describe At All; 10 = Describes Perfectly)	GTHA Residents (n=4150)	Pearson Intercepts (n=829)	Pearson Employees (n=323)
Is modern	77	91	81
Will help improve Toronto's image as a world-class city	72	80	83
Would improve the image of Pearson Airport as a world class travel hub	72	81	85
Would be comfortable	68	81	81
An environmentally friendly option	66	76	68
Will be beneficial to Toronto's economy	64	73	75
Will reduce the stress of travelling to/from the airport	56	62	65
Conveniently located	52	68	57
Transportation I'm more likely to take when weather is bad	47	N/A	43
Would be kid friendly	42	64	N/A



Q16. Based on what you have just read today about the ARL, how well do the following statements describe the ARL? Please use a 10-point scale, where 1 means 'Does Not Describe At All' and 10 means 'Describes Perfectly'.

Perceptions of the ARL – By Sample Type

- ‰ Pearson Employees – most who live in the West (Hamilton, Halton, Peel region) are the least likely to see any benefit when it comes to reducing their travel time to and from Pearson.
- ‰ Nearly 4-in-ten of GTHA residents, and nearly two-thirds of those interviewed at Pearson, believe that the ARL will provide a real advantage compared with Toronto Island Airport.
- ‰ It is crucial to keep in mind that, when looking at these results, survey participants are reacting to a concept, and as such, are not quite sure what to expect when it comes to actual travel time (which is reflected in the modest scores on these associated metrics).

% Rating 8-10 (1=Does Not Describe At All; 10 = Describes Perfectly)	GTHA Residents (n=4150)	Pearson Intercepts (n=829)	Pearson Employees (n=323)
Would reduce my travel time	41	54	32
Would be fastest way for me to get to the airport	41	49	30
Would be the fastest way for me to return from the airport	41	50	32
Is the best option for me to return to the airport	41	43	32
Is the perfect transportation option for me	40	44	32
Is the best option for me to get to the airport	40	43	31
Would provide a real advantage vs. Toronto Island Airport	39	63	48
Doesn't connect directly to the terminal I typically fly out of	16	33	27
Is disruptive to families along the route	13	N/A	8
Is too complicated	10	12	8



Q16. Based on what you have just read today about the ARL, how well do the following statements describe the ARL? Please use a 10-point scale, where 1 means 'Does Not Describe At All' and 10 means 'Describes Perfectly'.

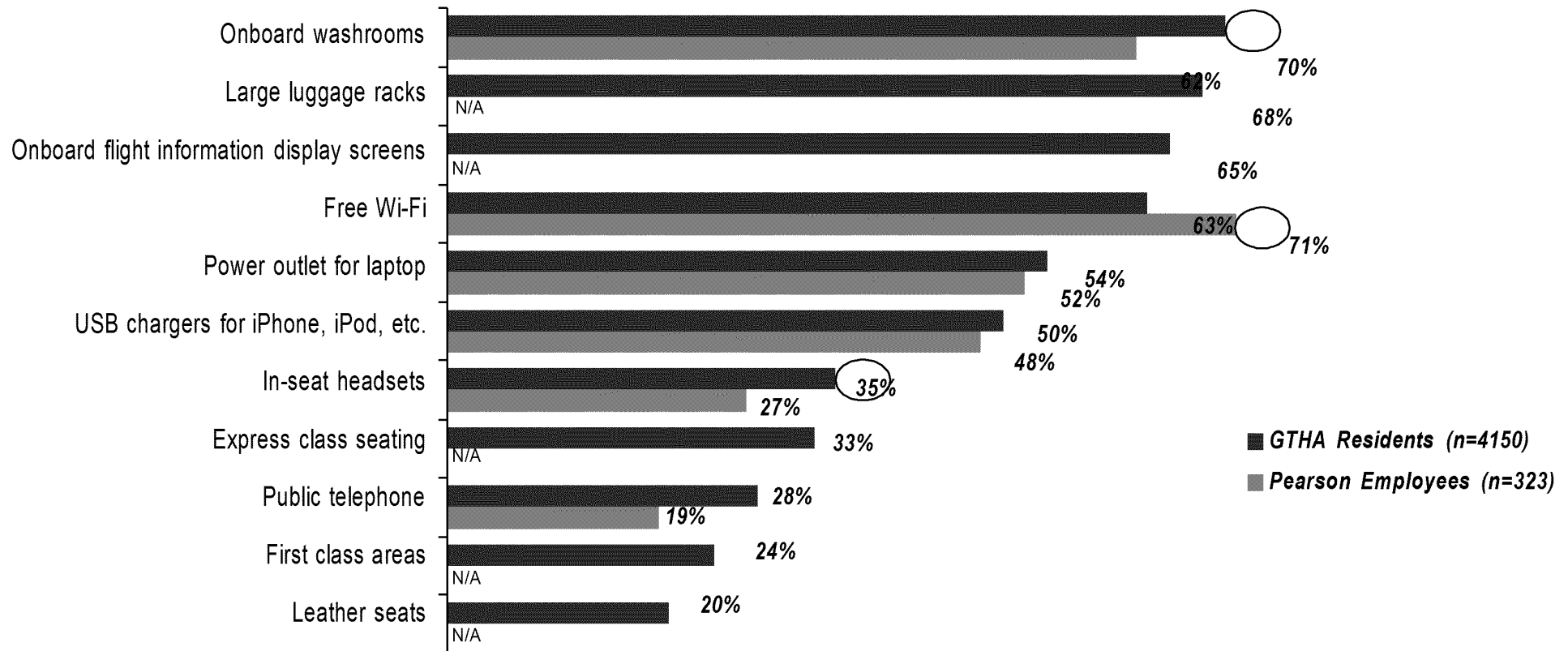
Exclusion per Committee Direction

Overall Importance of Amenities: Design Features

‰ The most important design features for GTHA residents include: onboard washrooms, large luggage racks, and flight information display screens. For Pearson employees, onboard washrooms and free Wi-Fi are the most important design elements.

Importance of Amenities to Overall ARL Experience

% rating 8-10 on 10-point scale, where 1=not at all important & 10 = extremely important



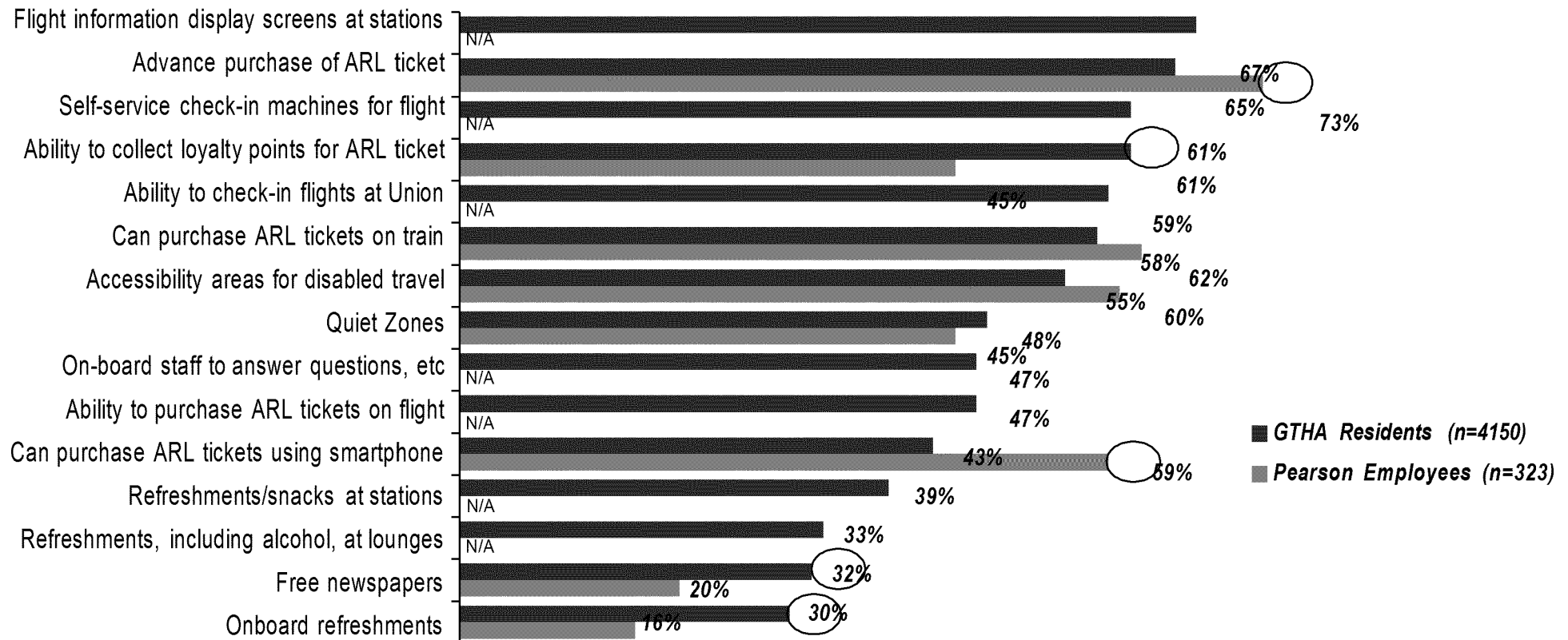
Q53. Metrolinx is considering a number of potential options as they continue to tailor the ARL experience to meet customer needs. How important are each of the following when you think about the overall experience of taking the ARL? Please use a 10 point scale where 1 is not at all important and 10 is extremely important

Overall Importance of Amenities: Service Features

‰ The most important service features are: flight information display screens at stations, the ability to purchase a ticket for the ARL in advance, loyalty points (for GTHA residents) and self-service check-in machines for the flight.

Importance of Amenities to Overall ARL Experience

% rating 8-10 on 10-point scale, where 1=not at all important & 10 = extremely important



Q53. Metrolinx is considering a number of potential options as they continue to tailor the ARL experience to meet customer needs. How important are each of the following when you think about the overall experience of taking the ARL? Please use a 10 point scale where 1 is not at all important and 10 is extremely important

Overall Importance of Amenities – Among GTHA Residents

- There are no differences in the top amenities by traveller type.
- While the differences are minor, business travellers are more likely to say that business-specific amenities, such as free Wi-Fi and power outlets for laptops are important.

% rating 8-10 (1=not at all important; 10 = extremely important)	GTHA Residents		
	Total (n=4150)	Business Travellers (n=1245)	Non-Business Travellers (n=2905)
Onboard washroom	70	70	71
Large luggage racks	68	67	69
Flight information display screens at stations	67	68	67
Advance purchase of ticket for ARL	65	66	65
Onboard flight information display screens	65	64	66
Free Wi-Fi	63	67	61
Self-service customer check-in machines for selected airlines	61	62	60
Ability to collect loyalty program points	61	62	60
Ability to check-in flights at Union Station	59	58	59
Can purchase ticket for the ARL onboard the train	58	58	57
Accessibility area for disabled travel	55	52	56
Power outlet for laptop	54	58	52
USB chargers for iPhone, iPod, etc	50	52	49



Q53. Metrolinx is considering a number of potential options as they continue to tailor the ARL experience to meet customer needs. How important are each of the following when you think about the overall experience of taking the ARL? Please use a 10 point scale where 1 is not at all important and 10 is extremely important

Overall Importance of Amenities – Among GTHA Residents (continued)

Furthermore, while non-business travellers are more likely to say that having staff on-board is important, business travellers are more likely to find the additional ‘niceties’ important (albeit still to a lesser degree, comparatively, than other items): express class seating, refreshments, newspapers, leather seats, etc.

% rating 8-10 (1=not at all important; 10 = extremely important)	GTHA Residents		
	Total (n=4150)	Business Travellers (n=1245)	Non-Business Travellers (n=2905)
Quiet zone onboard the train	48	50	47
On-board staff to answer questions, provide directions, etc	47	42	49
Ability to purchase tickets for the ARL on your flight	47	47	46
Can purchase ARL ticket using your smartphone	43	47	41
Refreshments/snacks at stations	39	41	38
In-seat headsets for listening to news/announcements	35	37	34
Express class seating	33	37	32
Refreshments, including alcohol, at lounges	33	36	32
Free newspapers	32	35	30
Onboard refreshments	30	32	30
Public telephone	28	27	28
First class areas	24	29	22
Has leather seats	20	23	19



Q53. Metrolinx is considering a number of potential options as they continue to tailor the ARL experience to meet customer needs. How important are each of the following when you think about the overall experience of taking the ARL? Please use a 10 point scale where 1 is not at all important and 10 is extremely important

Alternative Uses for the ARL



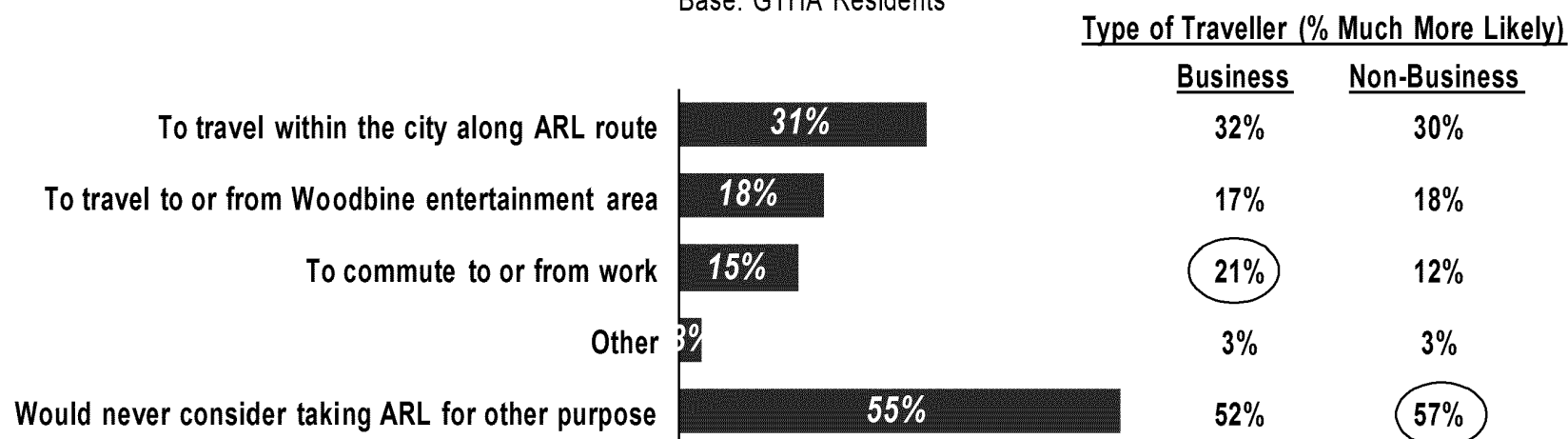
Note: This section only asked of GTHA residents

Other Purposes for ARL Consideration – Among GTHA Residents

‰ Fewer than half of GTHA residents would consider using the ARL for other purposes, namely to travel within the city among the ARL route, especially among those living in the Toronto West area.

Other Purposes for ARL Consideration

Base: GTHA Residents



GTHA Residents	Region								
	Downtown Core	Downtown West	Downtown East	Toronto West	Toronto East	Scar-borough	Pickering etc	York	West
<i>Travel within city</i>	24	31	24	39	34	32	29	33	34
<i>Travel to/from Woodbine</i>	16	17	15	20	21	16	17	20	17
<i>Commute to/from work</i>	11	17	8	19	20	15	11	11	14
<i>Would never consider</i>	62	56	62	47	48	57	58	57	47



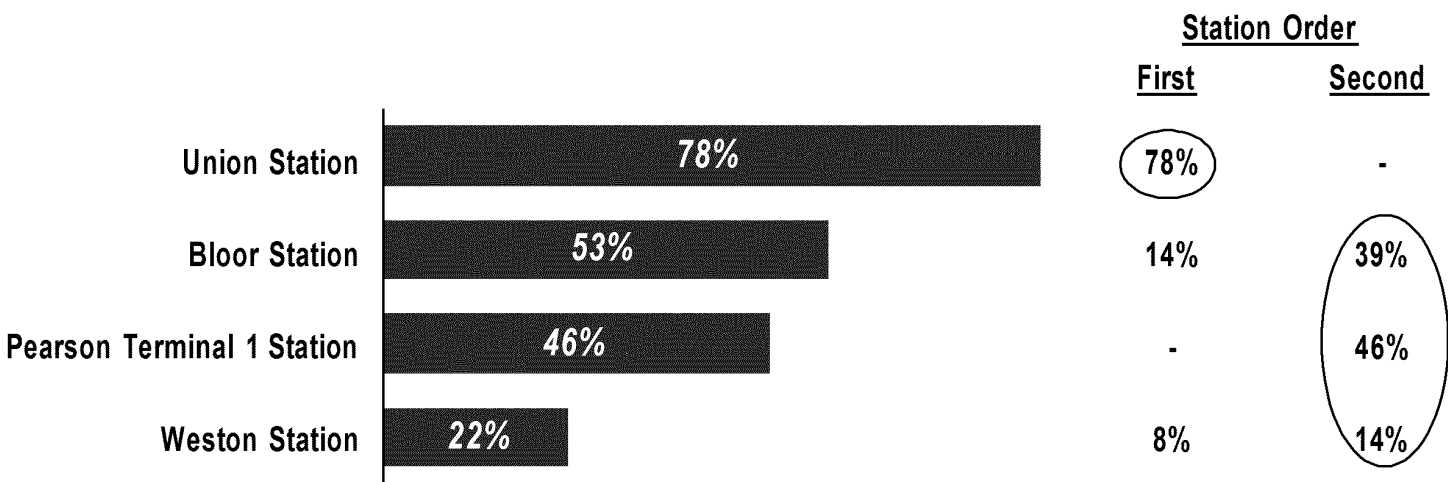
Q50. For what purpose(s), other than travel into or out of Pearson Airport, would you consider taking the ARL? Please select all that apply.

Stations Most Likely to Use for Other Travel

‰ Most travel for purposes other than to/from Pearson will start at Union, while ending at Bloor or Pearson Terminal 1.

Stations Most Likely to Use for Other Travel

Base: GTHA Residents



Q51. Thinking about when you would use the ARL for a purpose other than travelling into or out of the airport, which two stations are you most likely to travel between?

Main Method of Travel To/From Stations for Other Travel

‰ Travel to Union and from Bloor most likely to be via TTC, followed by walking.

‰ Travel from Pearson and Weston most likely to be TTC or a ride from someone else.

GTHA Residents

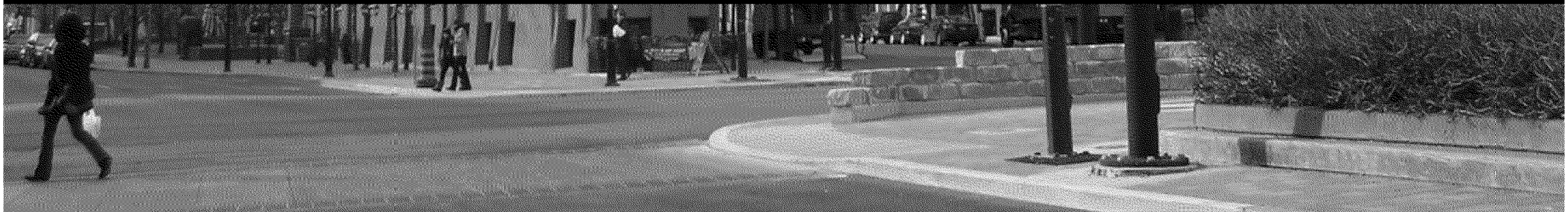
% More Likely to Take ARL	To Union	From Pearson	From Bloor	From Weston
<i>TTC bus/subway</i>	46	31	53	28
<i>Walk</i>	12	6	11	7
<i>GO train</i>	12	6	3	3
<i>Someone else drives</i>	10	23	12	22
<i>Taxi</i>	7	9	6	11
<i>Drive yourself & park</i>	6	8	7	19
<i>GO bus</i>	3	4	1	3
<i>Courtesy shuttle</i>	3	6	1	3
<i>Limousine / car service</i>	2	4	3	4
<i>Other</i>	2	4	2	1



Q52. And how would you get to or from these stations?



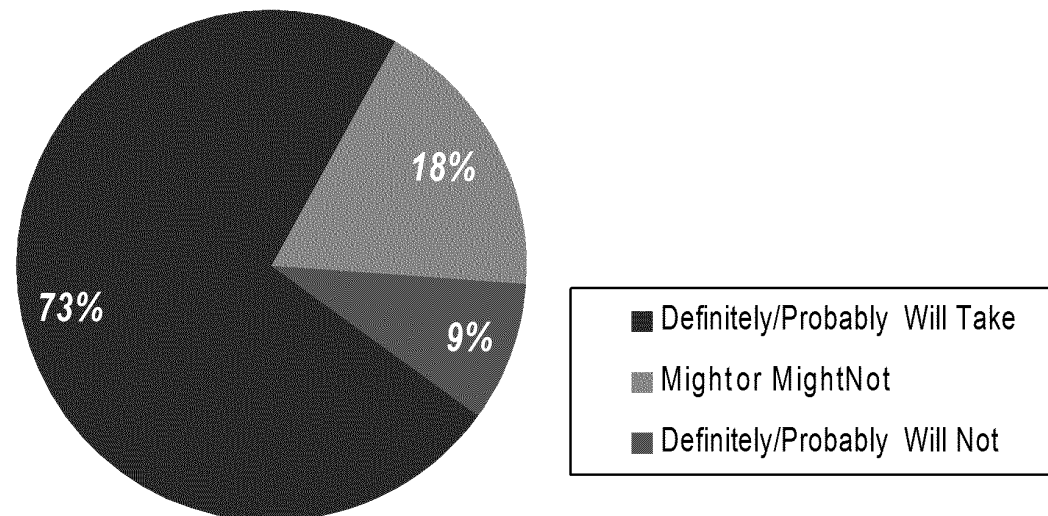
Spotlight on Downtown Core



Likelihood to Take the ARL

Among those living/working in downtown Toronto, the vast majority (nearly three-quarters) claim they would take the ARL in the future. Less than 1-in-ten say they definitely/probably would not use the service.

Likelihood to Take the ARL
Base: Residents of the GTHA who Live/Work in Downtown



Likelihood to Use the ARL - Profile

	Likely to Use (T2B) (n=1570)	Might or Might Not (n=391)	Unlikely to Use (B2B) (n=189)
Average Age	38	40	43
Gender			
Male	43	46	48
Female	57	54	52
Average # Times Flown Out of Pearson in P12M	3.3	2.9	3.0
Average % of Travel is for Business	30	29	30
Average % of Travel is for Non-Business	70	71	70
Location Depart From When Going to Pearson			
Home	95	96	94
Work	4	3	3
Location Return to When Returning from Pearson			
Home	98	100	99
Work	2	--	1
Travel Locations (in Past 12 Months)			
International	37	40	43
To the US	32	31	27
Within Canada	32	29	30
Average Income	\$85,500	\$96,200	\$103,300



Base: live and/or work in downtown Toronto (catchment areas 101-111)

Likelihood to Use the ARL - Profile

‰ In addition to being slightly older and more affluent, those living/working in downtown Toronto who are unlikely to take the ARL are also most likely to travel alone. On the other hand, those who anticipate taking the ARL in the future are the least likely to have someone drive them to the airport and tend to spend the most on travel to/from the airport.

	Likely to Use (T2B) (n=1570)	Might or Might Not (n=391)	Unlikely to Use (B2B) (n=189)
Method of Travel When Going to Pearson			
Someone else drove you	24	30	32
Limo/car service	19	17	21
Taxi	21	17	13
Drove self and parked	10	13	10
TTC	17	17	20
Toronto Airport Express Bus	6	4	1
Method of Travel to Pearson = Method of Travel When Returning from Pearson	77	83	85
Amount Paid for Travel To Pearson	\$40	\$33	\$32
Typically Travel...			
Alone	38	37	49
With Others	62	63	51



Unaided Impressions of the ARL

‰ Even before exposure to the concept, those who are unlikely to take the ARL have a negative preconceived notion of the service, with some anticipating it will be expensive, and some saying that it is a waste of money and only benefits people living in downtown Toronto.

	Likely to Use (T2B) (n=1570)	Might or Might Not (n=391)	Unlikely to Use (B2B) (n=189)
Impressions of the ARL (unaided)			
Good idea/like it	35	30	24
Long overdue	20	17	9
Important/need it	17	12	3
Fast/efficient	13	7	5
Convenient	14	8	4
Connects from Union to Pearson	11	7	5
Many major/world-class cities already have	10	8	2
Affordable	7	3	--
Expensive	5	10	18
Good alternative method for transportation	6	5	1
Only benefits people in downtown	2	5	13
No interest/won't use	--	6	22
Waste of money	--	3	14



Base: live and/or work in downtown Toronto (catchment areas 101-111)

Appeal & Likely Access/Egress Points

Interestingly, about half of those who are the least likely to anticipate taking the ARL in the future believe that, if they were to use the service, they would access the ARL via Bloor Station.

	Likely to Use (T2B) (n=1570)	Might or Might Not (n=391)	Unlikely to Use (B2B) (n=189)
Level of Appeal of ARL (10-point scale)			
%8-10	86	34	7
%4-7	13	60	48
%1-3	1	6	45
Access Point			
Union Station	65	54	45
Weston Station	3	6	7
Bloor Station	32	40	48
Egress Point			
Union Station	61	51	42
Weston Station	6	8	8
Bloor Station	33	42	50

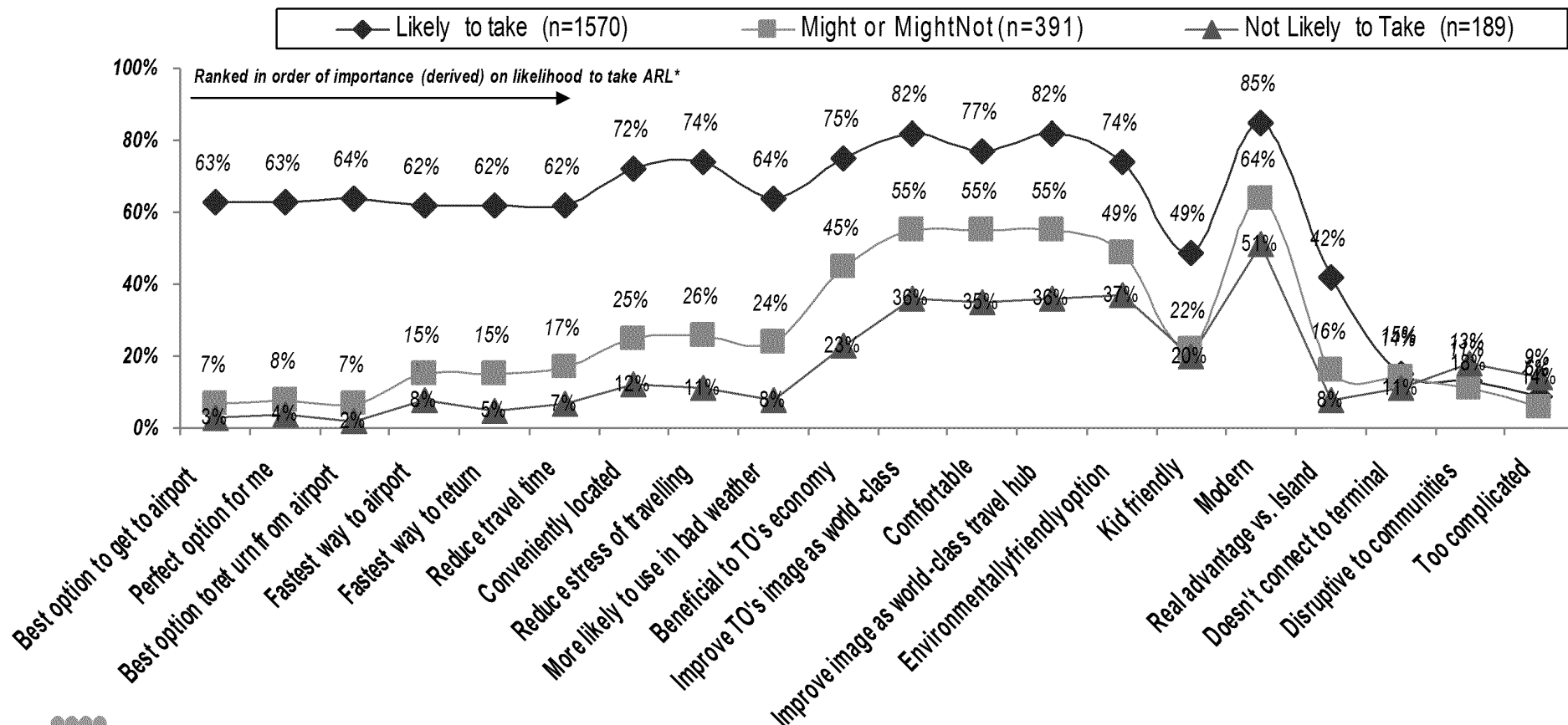


Perceptions of the ARL – Among Downtown Toronto Residents

Those are unsure as to whether they will take the ARL in the future are not convinced about the efficiency of the new service – if it is the fastest/easiest way to get to and from the airport. They do believe (although to a lesser degree than those who are planning on taking the ARL) that it will improve perceptions of Toronto, as well as that it will be modern and comfortable.

Perceptions of ARL

% Rating 8-10 on a 10-Point Scale From Does Not Describe At All to Describes Perfectly



Q16. Based on what you have just read today about the ARL, how well do the following statements describe the ARL? Please use a 10-point scale, where 1 means 'Does Not Describe At All' and 10 means 'Describes Perfectly'.

*See appendix for definition of derived importance

Base: live and/or work in downtown Toronto (catchment areas 101-111)

Exclusion per Committee Direction

Impact of Discounts to Increase Likelihood to Take ARL

‰ However, discounts – particularly for frequent travellers and groups/families – is likely to increase likelihood to use the service among all downtown residents.

	Likely to Use (T2B) (n=1570)	Might or Might Not (n=391)	Unlikely to Use (B2B) (n=189)
% Much/Somewhat More Likely to Take ARL If...			
Free travel for children under 4 years of age	33	23	12
Discounts for children 5 – 12 years	34	25	12
Discounts for students	38	28	13
Discounts for seniors	36	30	19
Discounts for frequent travellers	74	57	27
Discounts for groups/families	64	50	27



Top Ranked Amenities

‰ The top amenities, irrespective of interest in the ARL, are: onboard washrooms, free Wi-Fi, large luggage racks, and onboard flight information display screens. Those who, based on the concept, claim they wouldn't take the ARL in the future also find the ability to check into flights at Union a key amenity.

	Likely to Use (T2B) (n=1570)	Might or Might Not (n=391)	Unlikely to Use (B2B) (n=189)
% Ranking Following Amenities in Top 3			
Onboard washrooms	30	36	34
Free Wi-Fi	38	32	31
Large Luggage Racks	25	26	28
Onboard Flight Information Display Screens	23	22	26
Ability to Collect Loyalty Points	20	17	13
Advance Purchase of Ticket	21	17	21
Flight Information Display Screens at Stations	17	16	14
Ability to Check Into Flights at Union	17	12	23
Can Purchase ARL Tickets on Flight	15	19	17
On-Board Staff to Answer Questions	12	13	9
Self-Service Check-In Machines	12	14	12
Power Outlets for Laptops	13	9	10
Quiet Zone on Train	8	10	14
Accessibility Area for Disabled Travel	8	10	16



Base: live and/or work in downtown Toronto (catchment areas 101-111)

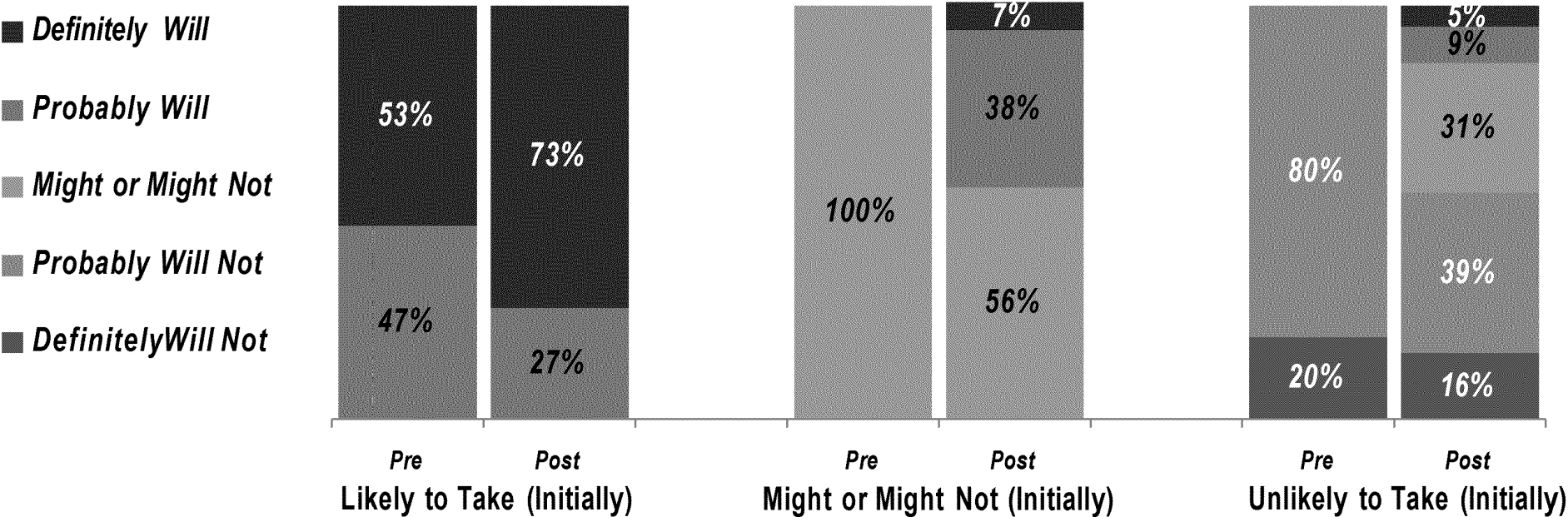
Impact of Amenities on Likelihood to Use the ARL

- By Likelihood to Use ARL

With the inclusion of the additional amenities, about one-third of those who previously claimed they would not take the ARL, now say they would consider it, while slightly fewer than half of those who were originally ‘on the fence,’ now claim they would be willing to take the ARL in the future.

Impact of Amenities on Likelihood to Use ARL

Base: Residents of the GTHA who Live/Work in Downtown



Q56. Earlier, you mentioned that you (INSERT RESPONSE FROM Q15) use the ARL to travel into or out of Pearson Airport. If the ARL had the following amenities (TOP 3 FROM Q54), how likely would you be to use the ARL? *Note: This question was only asked of GTHA residents.
Base: live and/or work in downtown Toronto (catchment areas 101-111)