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From: H| +1.-7 @7 è7 î\ |
Sent: Wed 11/23/2011 7:08:42 PM
Subject: RE: ARL Market Assessment - Final Report

Daniel, thanks for your feedback.

In regards to the Northstart market assessment study, we needed to close off this report and issue as many partners are needing information within, not specifically ridership, but other components that help inform brand design and customer experience as this work is progressing very rapidly. As a market assessment, our objectives were to understand overall appeal, potential uptake (with the conceptual service view only), likelihood to use, Exclusion per Committee Direction high level segments and current transportation methods. It is not intended to model ridership, nor should it be used for ridership forecasting. The reference for that should be your SDG ridership forecasts.

Our report follows a different methodology, which was agreed upon by all partners from inception, than the ridership study. Our insights are accurate based on those assumptions. We support your concerns about potential conflict of data interpretation specifically with ridership at Bloor. Our understanding of next steps was that SDG would provide recommendations which is what you've attached. This report should be used as a compliment to our study.

I don't think we need to revise each study however I do think that one cannot be looked at in exclusivity. The research we will continue to do through the development of ARL service will refine insights and further inform.

Hope this clarifies. We can certainly meet to discuss further.

Thanks Paula

From: Daniel Haufschild
Sent: Tuesday, November 22, 2011 12:58 PM
To: Philip Safos; Kathy Haley; Mary Proc; Paula Edwards; Angela Prashar; Leslie Woo; William Jenkins; Mike Cyr; Nick Spensieri; Francis Hui; 'Anthony Campbell'; 'Robert Laufer (Hospex)'; 'Mike Napier'; 'Matt Kelly'; Vasie Papadopoulos; Anthony Bowman; Trina Melatti; Erin Whitton; Michael O'Neill; Shyvonne Lawrence
Subject: RE: ARL Market Assessment - Final Report
Importance: High

Phil,

This does not reflect the work SDG did to align the two studies. We agreed that SDG would look at the ridership study and Northstar results and make recommendations on how to report the data so that we have a common set of findings and data.

This report was given to RABS last week.

I understood we would agree on what we are reporting first, before releasing a final.

Two notable issues SDG pointed out, among others:

1. SDG recommended using the unweighted data as this was more consistent with the previous four studies. Using the airport ratio of leisure vs business travel seems to have influenced the results and there was better alignment between the two more current studies using the unweighted data.

2. We should not report that 1/3 of passengers would access the service at Bloor, but rather the %16 as reported by the ridership forecast study. Both surveys show similar "potential market", Exclusion per Committee Direction
Exclusion per Committee Direction

I attach the powerpoint that compares the two studies.

I will followup with Paula on how we revise the final report to address these issues so we don't have different findings circulating around the organization.

Daniel

From: Philip Safos

Sent: Tuesday, November 22, 2011 10:37 AM

To: Kathy Haley; Mary Proc; Paula Edwards; Angela Prashar; Daniel Haufschild; Leslie Woo; William Jenkins; Mike Cyr; Nick Spensieri; Francis Hui; 'Anthony Campbell'; 'Robert Laufer (Hotspex)'; 'Mike Napier'; 'Matt Kelly'; Vasie Papadopoulos; Anthony Bowman; Trina Melatti; Erin Whitton; Michael O'Neill; Shyvonne Lawrence

Subject: ARL Market Assessment - Final Report

Further to Northstar's presentation on October 7th, attached is the final report of the ARL Market Assessment study.

Thanks,
Phil

Philip Safos

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