



Ipsos Reid

**Toronto
Port
Authority**



**Administration
Portuaire
de Toronto**

Tracking Study – 2010

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Nobody's Unpredictable



Ipsos Reid

***The Small Print...**

Ipsos Reid does no political polling and hasn't since 1986...

We do \$200 million of market research in Canada of which 2% is for Governments (federal/provincial/municipal, all of which are on the public record)...

We do \$450 million of market research in North America and are part of the Ipsos group of market research companies spanning 88 countries with annual revenues in excess of \$1.6 billion...

We are the media polling partners for CanWest/Global in Canada, NewsTalk 1010 Toronto, and Reuters in the US/UK and their International File...

Nobody's Unpredictable



Methodology

- *These are the findings of an Ipsos Reid poll conducted for the Toronto Port Authority conducted from May 27 to June 7, 2010. Elements of the study are tracked from 2007 (yearly) with some new questions added this year.*
- *A representative randomly-selected sample of 700 adults living in Toronto was interviewed by telephone. 'City section', gender and age quotas were implemented to ensure a balanced representation across the city, and an over-sample in the downtown area south of Queen Street was also employed. The distribution of the sample was:*
 - *Old Toronto South of Queen (Harbourfront) n = 300 / North of Queen n = 100*
 - *Scarborough n =75; Etobicoke n =75; York/East York n =75; North York n =75*
- *These data were weighted to ensure that the sample's regional and age/sex composition reflects that of the actual Toronto population according to Census data. With a sample of this size, the results are considered accurate to within ± 3.7 percentage points, 19 times out of 20, of what they would have been had the entire adult population of Toronto been surveyed. The margin for error for the 'Old City of Toronto' is ± 5.0 percentage points; in the South of Queen district is ± 5.7 percentage points; in Old Toronto North of Queen it is ± 9.8 percentage points, and in the other sections it is ± 11.3 percentage points in each part. The margin of error will be larger for other sub-groupings of the survey population...*
- *Inter-item contamination/bias potential within the survey instrument was avoided through an iterative technique of questioning...item bank statements and other question areas were randomized to lessen impact wherever possible...*



Executive Summary



Toronto and the Waterfront...

- **Torontonians continue to visit the waterfront with roughly the same frequency as last year. The most common reasons for visiting include attractions, events and entertainment, leisure, walking and recreation...**
- **Most (74%) Torontonians think the changes along the waterfront are heading in the right direction, an increase of 10 points over last year...**



Executive Summary

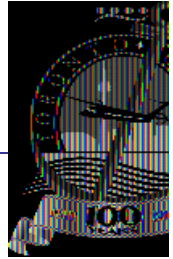


Attitudes Towards the Toronto Port Authority...

- Few Torontonians (1%) can name the Toronto Port Authority, unaided, as a group or organization involved in the revitalization of Toronto's waterfront. However, once prompted, eight in ten (80%) have heard of the TPA – the proportion of which increases to 85% among those living south of Queen Street...
- Torontonians most commonly cite 'governing the port/harbour, maintaining the waterfront, running the airport and regulating watercraft' as being among the TPA's responsibilities. While slightly more Torontonians have a favourable impression of the TPA this year, most have a fair impression or are indifferent. Once Torontonians learn of the various activities in which the TPA is involved, they say these things improve their impression – even more so than last year...
- A majority agrees the TPA plays a vital role, is important for the economy of the city, and should help the city grow in an environmentally-responsible way...Just two in ten (21%) Torontonians believe that the TPA should be disbanded, compared to 72% who believe it should remain independent from the city...



Executive Summary

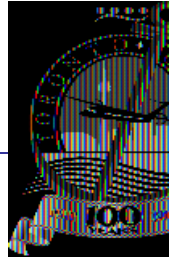


Billy Bishop City Centre Airport...

- **Most (70%) Torontonians are familiar with the Billy Bishop Toronto City Centre Airport...Most (63%) are personally in favour of having an airport on the island and believe it's good for the City of Toronto, including 65% of those living south of Queen Street.**
- **Two in three (65%) agree that the airport is an important part of Toronto's future economic growth...**
- **Most (75%) residents of Toronto don't hear any Toronto island airport noise at all. A majority (58%) of those living south of Queen Street don't hear any noise either. Two in ten (20%) living south of Queen hear 'some' or 'a lot' of noise....**
- **Among those who do hear noise (25%), one quarter (25%) think it's bothersome (7% very/18% somewhat) -- 24% of those South of Queen (5% very/19% somewhat) – while three quarters (75%) aren't bothered by it...**
- **As such, roughly 6% of all of those in Toronto are “bothered” by noise from the Airport...**



Executive Summary



Pedestrian Tunnel to the City Centre Airport...

- A majority (56%) of Torontonians support a pedestrian tunnel to the island airport. A majority (55%) of those who live south of Queen Street support a pedestrian tunnel...
- Once hearing that a tunnel will have the capacity to carry a new water main out to the islands in the harbour for residents and services there, three in ten (30%) say they become more likely to support the tunnel...
- Most agree that a ferry is not an efficient way for pedestrians to access the airport, and that a pedestrian tunnel is the best way to increase access to the island...



Detailed Findings...



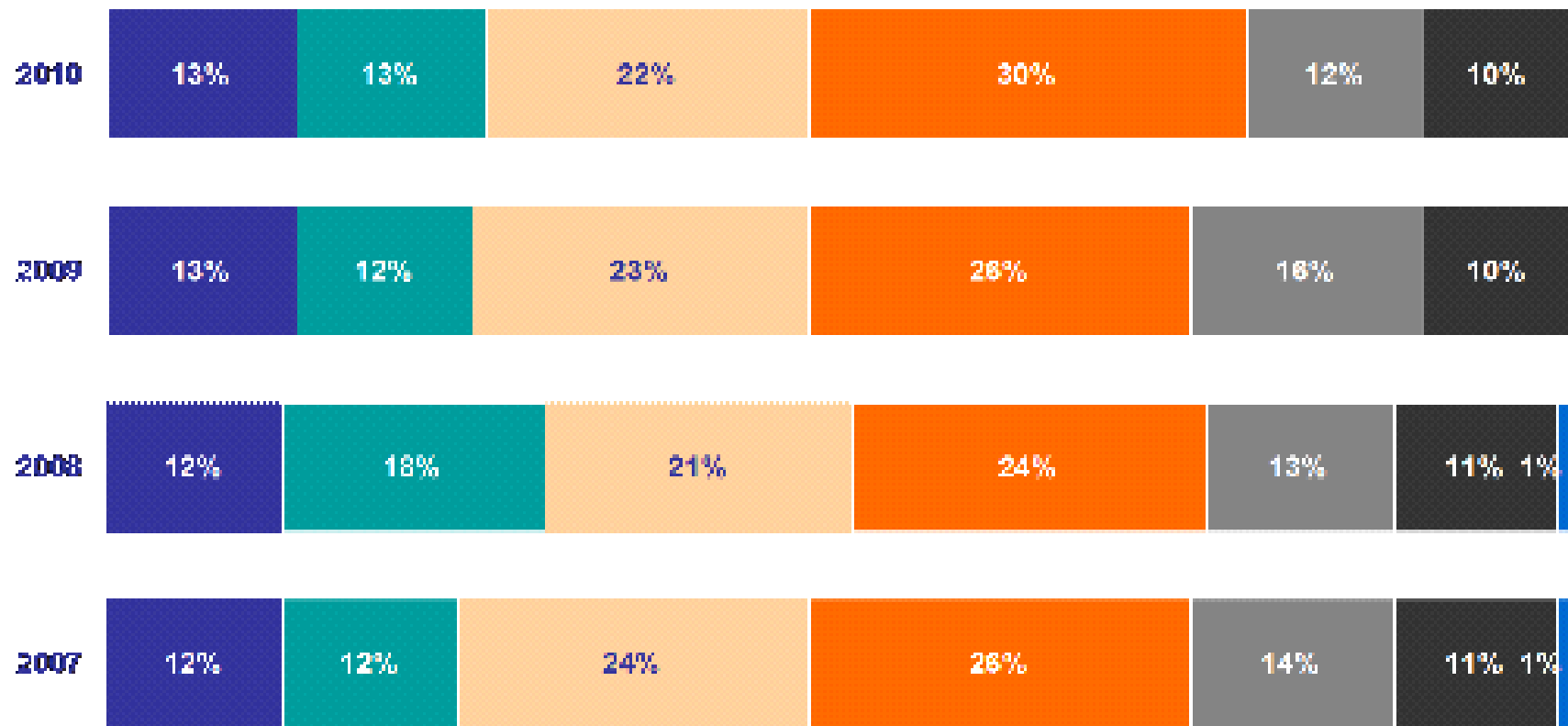
The TPA...



Frequency of Visiting the Waterfront Area...

- Visits to the waterfront area appear to be holding steady from year to year with 13% of Torontonians heading down at least once a week...

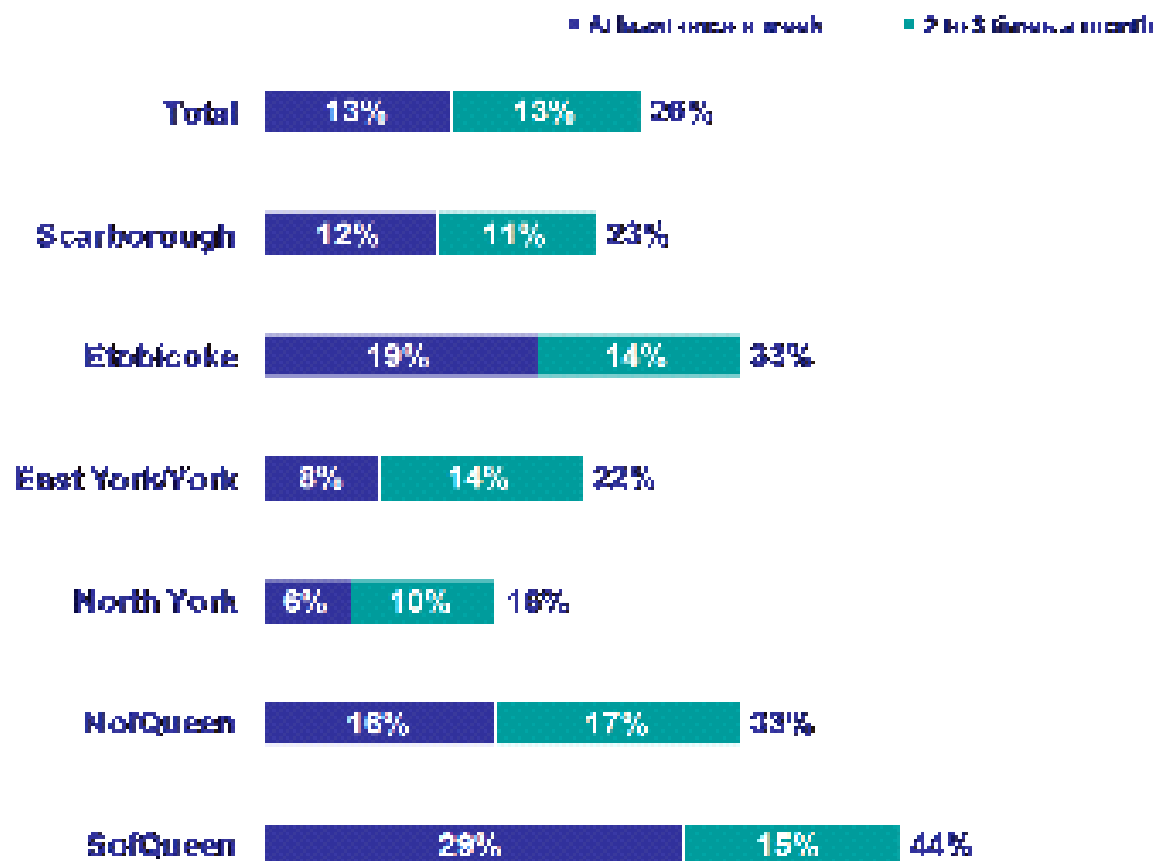
At least once a week 2 to 3 times a month 4 to 6 times a year 1 to 3 times a year Less than once a year Never Don't Know/Refused



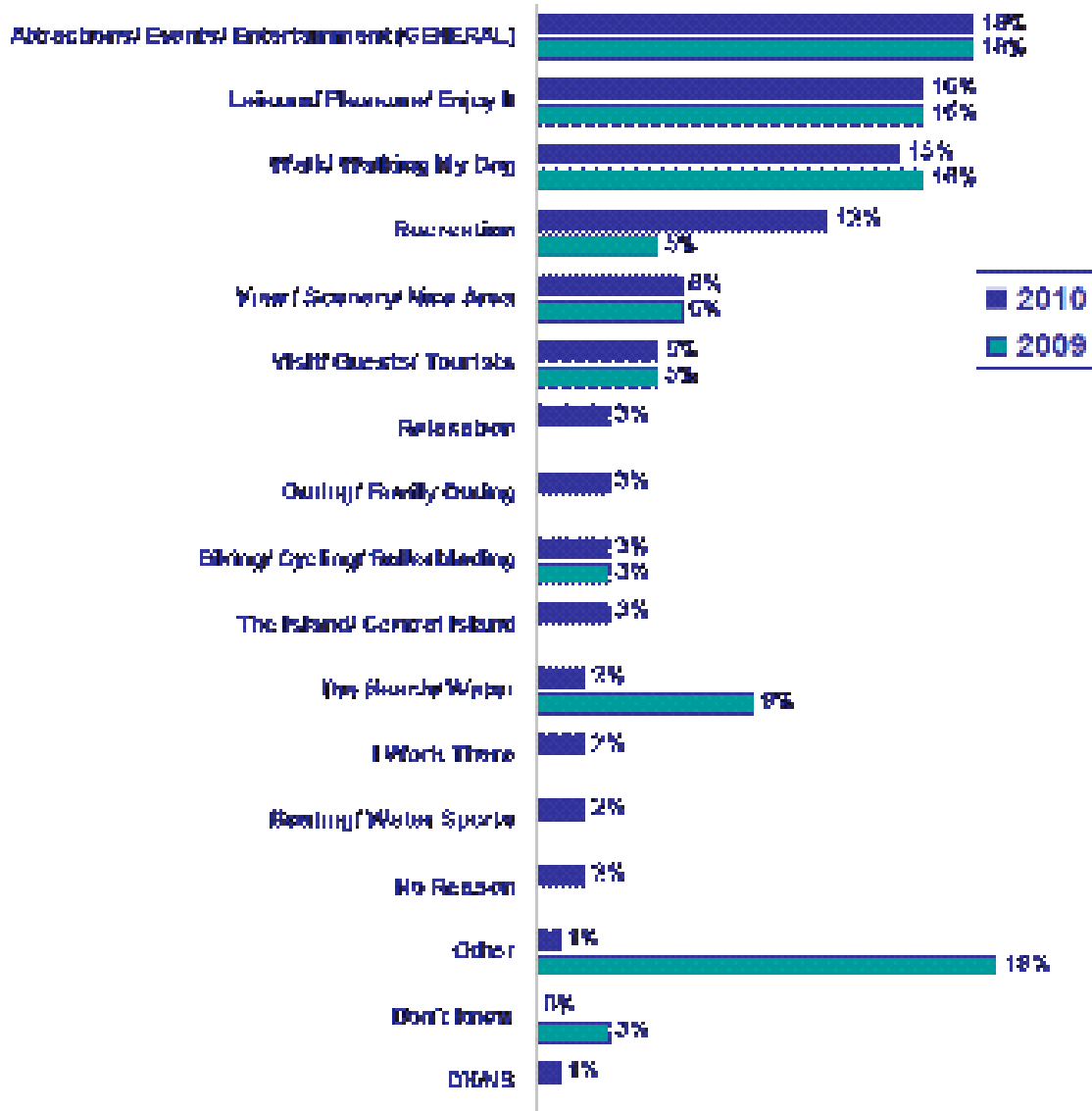


Frequency of Visiting the Waterfront Area – By City Section

- Four in ten (44%) residents living South of Queen street visit the waterfront at least a few times a month...Those North of Queen and in Etobicoke also utilize the waterfront area more than others



Reasons for Visiting the Waterfront...

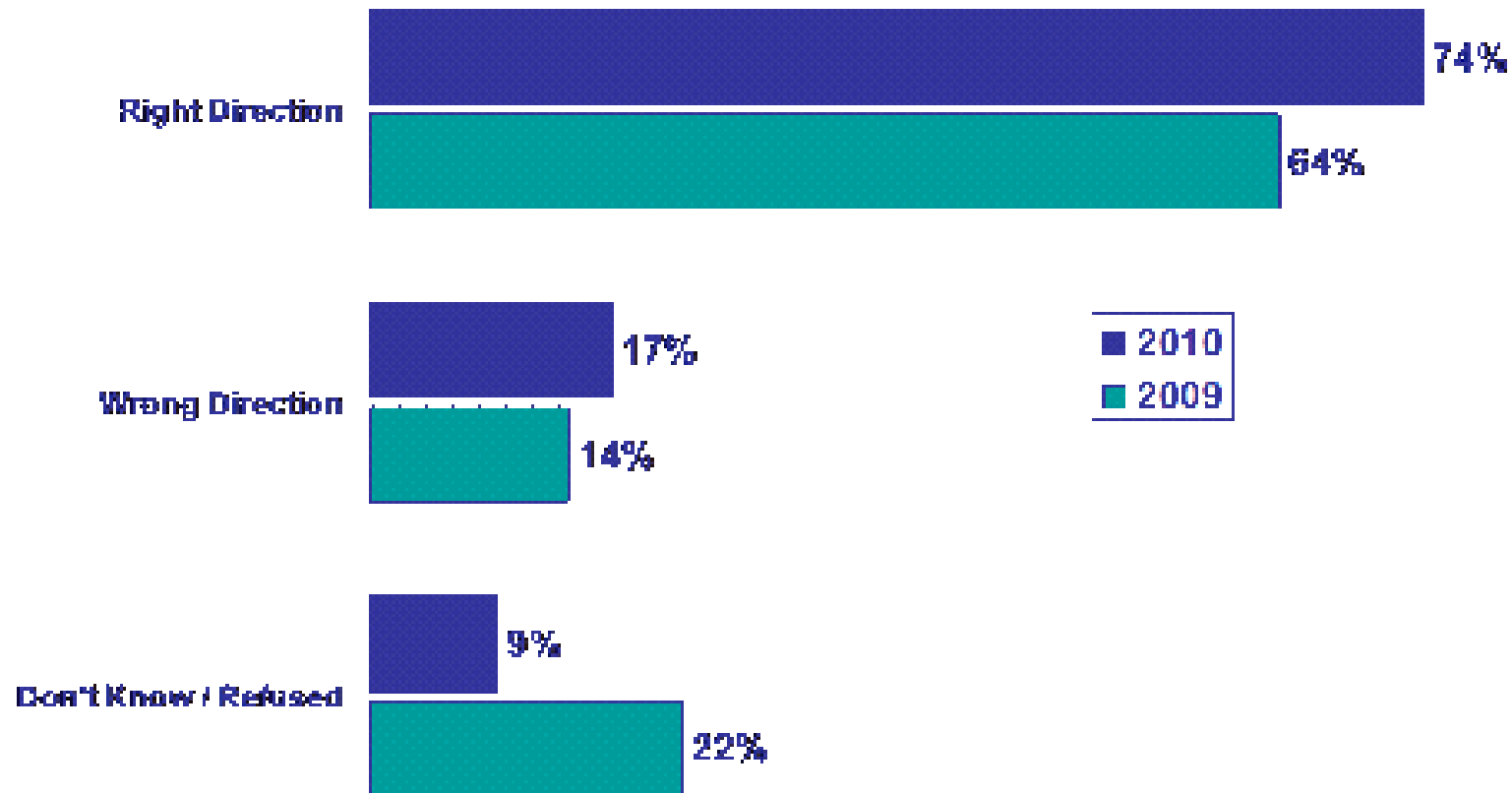


- Fewer Torontonians are heading to the waterfront for the beaches and water, but many still continue to go for the attractions, events and entertainment, recreation or for leisure and walks.



Do You Think Changes Along Toronto's Waterfront are Headed in the 'Right' or 'Wrong' Direction?

- **Significantly more Torontonians think that the changes happening along Toronto's waterfront are moving in the right direction, while fewer are unsure of what they think...**

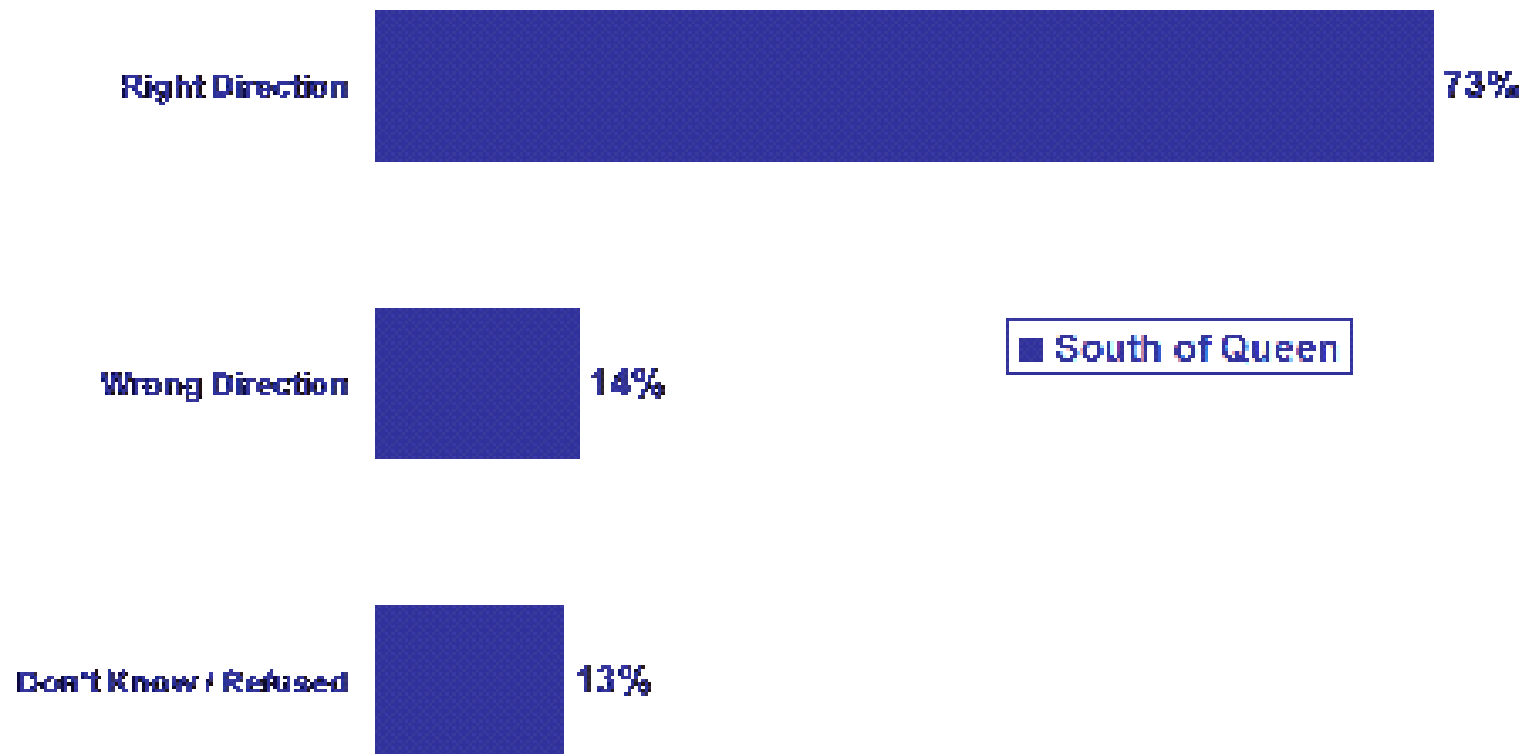


As you may know, Toronto's waterfront has been going through a process of revitalization in recent years, with the development and creation of new communities, parks and green spaces along the waterfront. Do you think these changes along Toronto's waterfront are headed in the (ROTATE: right direction or wrong direction)?



Do You Think Changes Along Toronto's Waterfront are Headed in the 'Right' or 'Wrong' Direction?

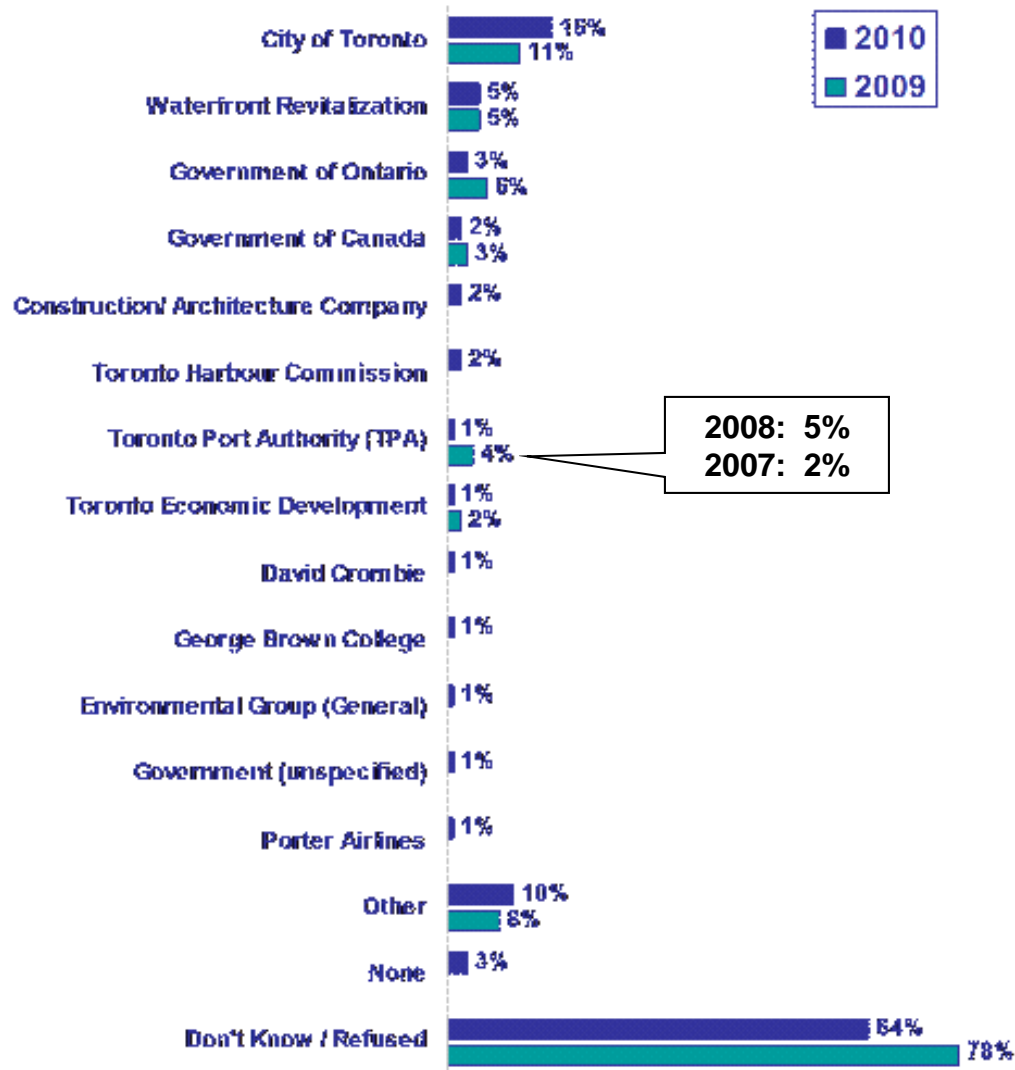
- Those living south of Queen Street are no more or less likely to think things are moving in the 'right' or 'wrong' direction...



As you may know, Toronto's waterfront has been going through a process of revitalization in recent years, with the development and creation of new communities, parks and green spaces along the waterfront. Do you think these changes along Toronto's waterfront are headed in the (ROTATE: right direction or wrong direction)?



Unaided Awareness of Waterfront Revitalization Organizations...



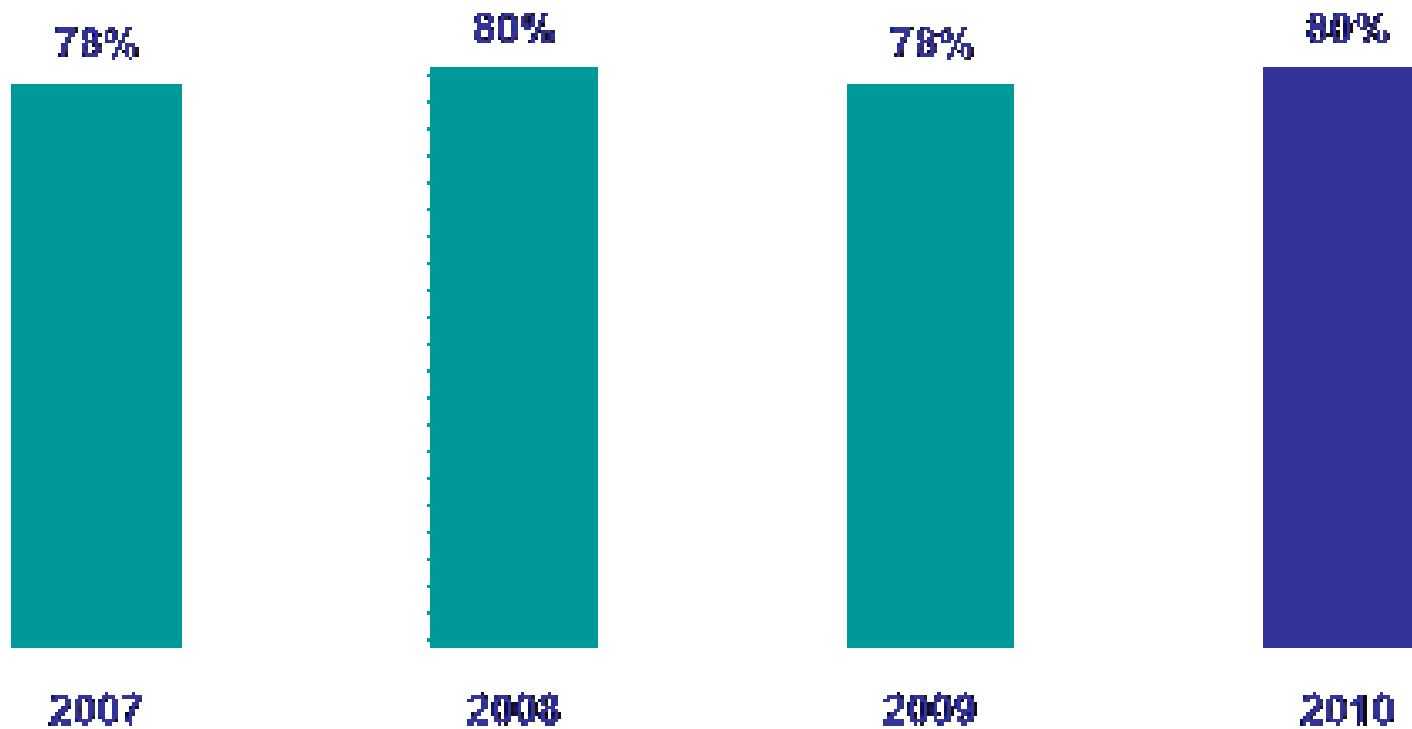
- Very few can name, unaided, the Toronto Port Authority as having been involved in the revitalization of Toronto's waterfront.

Can you identify any organizations or groups that have been involved in the revitalization of Toronto's waterfront? (OPEN END; DO NOT READ LIST; ACCEPT UP TO 3 MENTIONS; PROBE: Any others?)



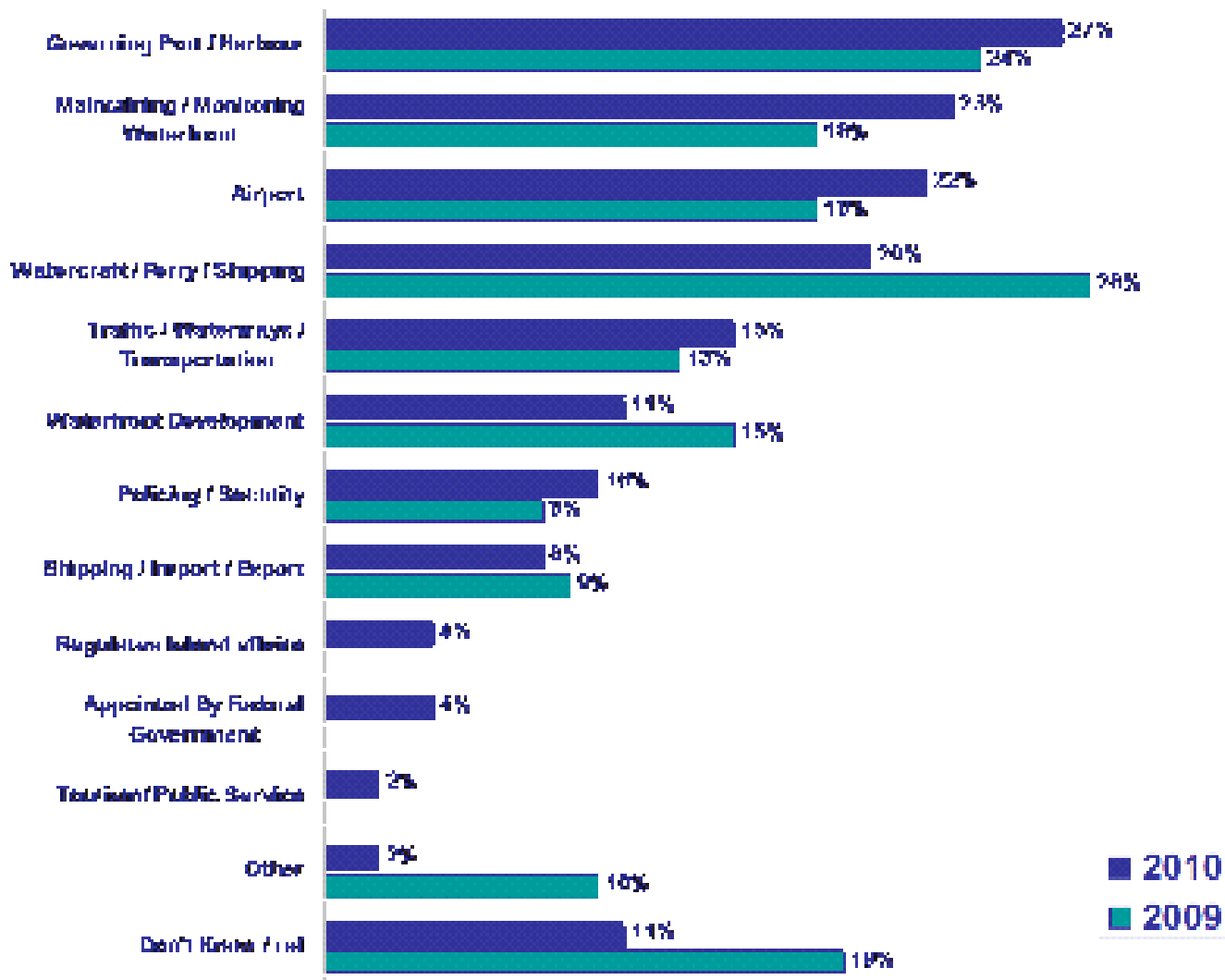
Prompted Awareness of the TPA...

- Once prompted, eight in ten (80%) Torontonians have heard of the Toronto Port Authority, virtually unchanged from last year and previous years (85% South of Queen Street)...





As Far As You Know, What Does The Toronto Port Authority Do? What Is It Responsible For?



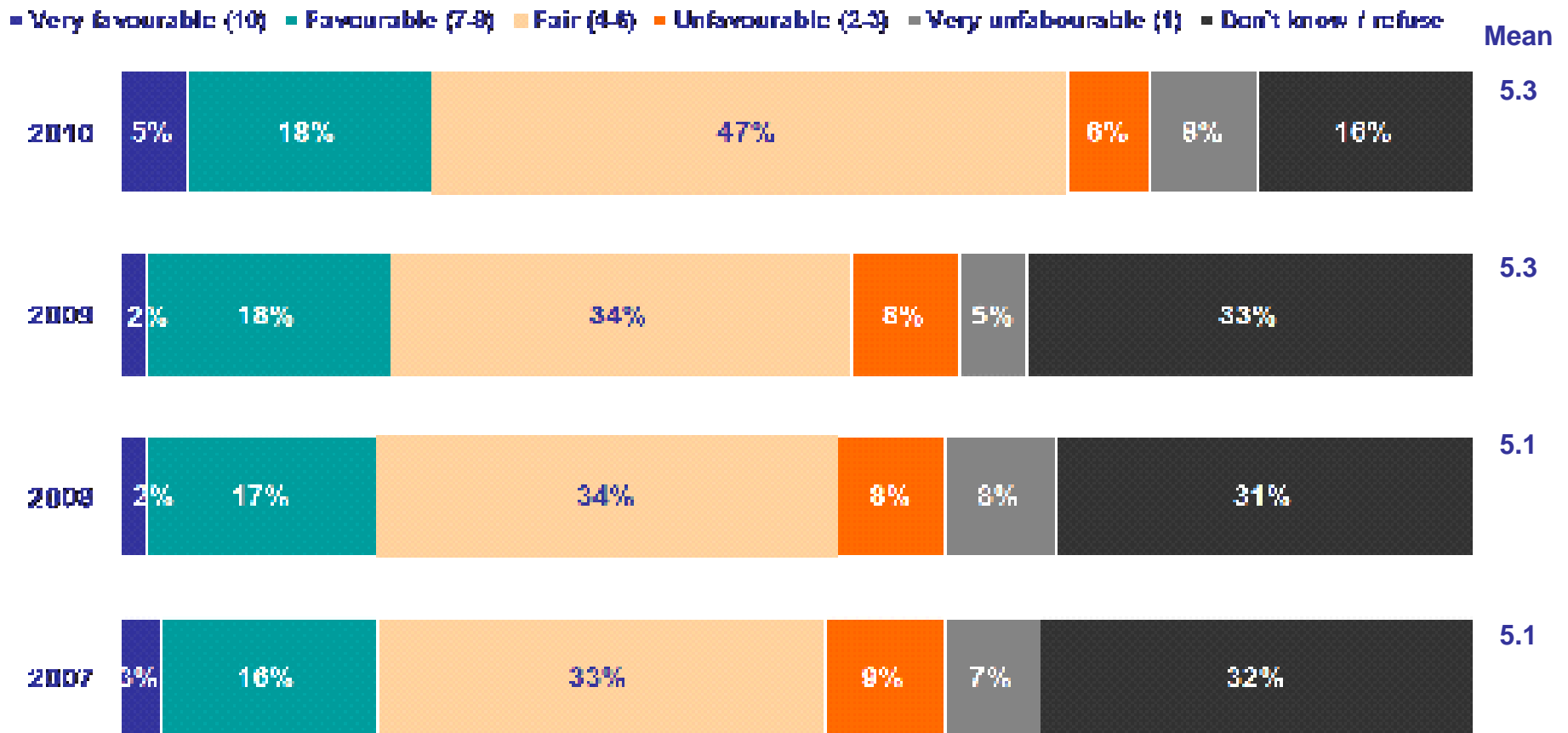
- Fewer individuals are *unsure* of what the port authority does...fewer offered up 'waterfront development' ...
- But more Torontonians, indicated TPA governs the port and harbour, maintains the waterfront and manages the airport among other responsibilities.

As far as you know, what does the Toronto Port Authority do? What is it responsible for? (OPEN END; DO NOT READ LIST; ACCEPT UP TO 3 MENTIONS; PROBE: Any thing else?)



Overall Impression of the TPA...

- Slightly more Torontonians (23%) have a favourable impression of the TPA than last year (20%). However, most have a 'fair' impression (up 13 points)—those with 'no impression/don't know' is down 17 points...



Using a scale of 1 to 10, where 1 is very unfavourable and 10 is very favourable please rate your impression of the Toronto Port Authority.

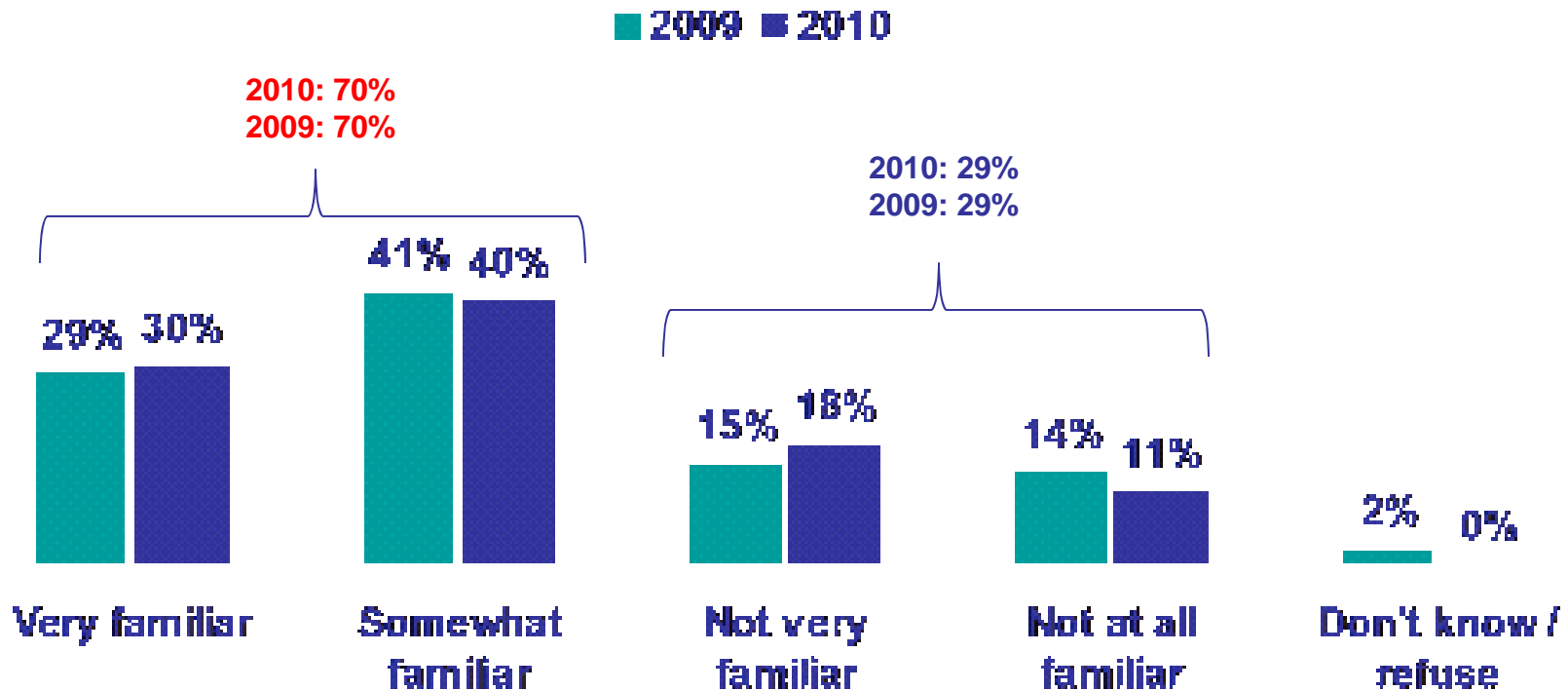


Billy Bishop Airport...



Familiarity with the Billy Bishop Toronto City Centre Airport / Toronto City Centre Airport...

- Seven in ten (70%) are familiar with the Billy Bishop Airport, equal to the proportion that said so last year...

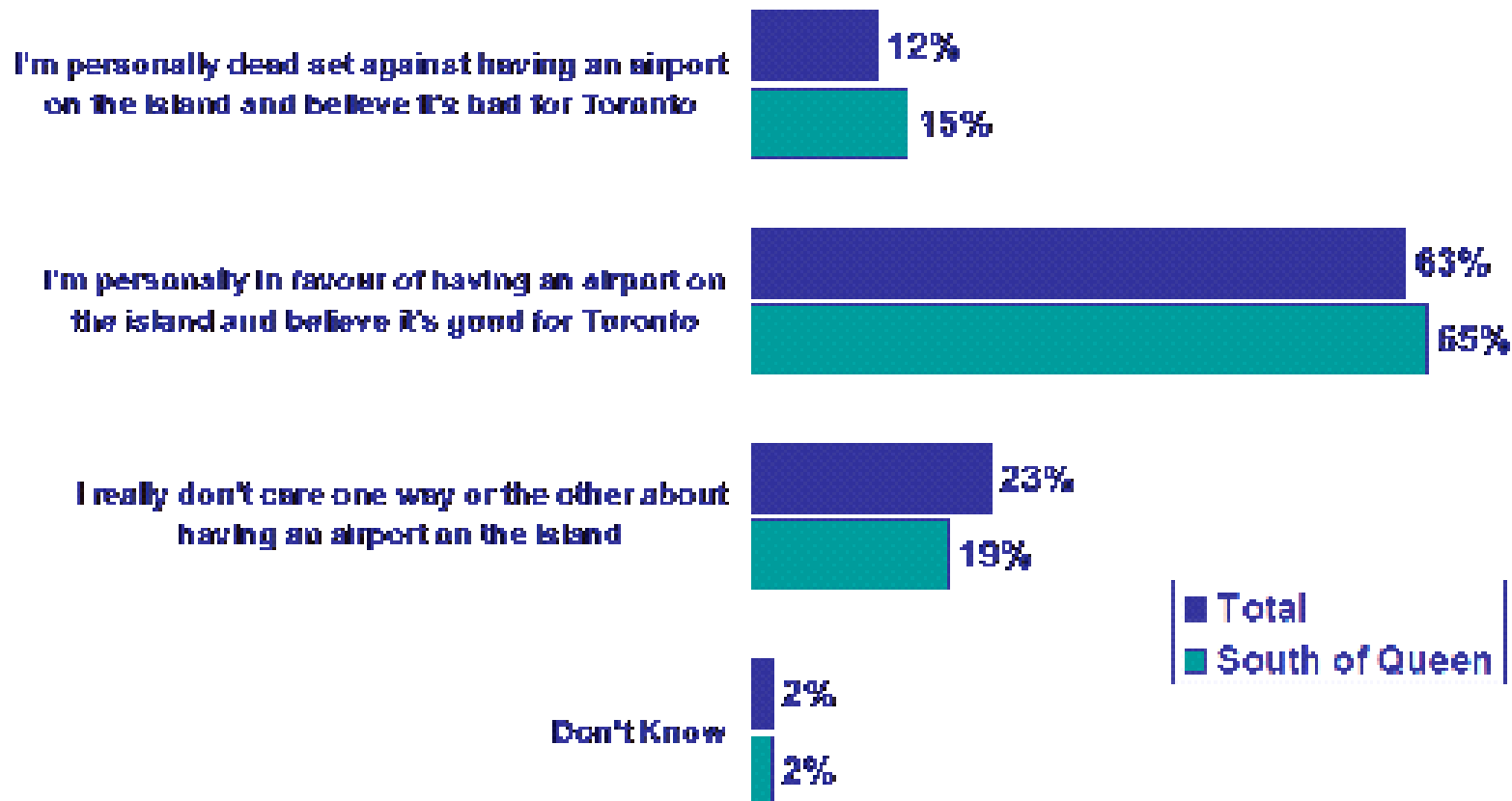


How familiar are you with the Billy Bishop Toronto City Centre Airport, also known as the Toronto Island Airport – located on the shore of Lake Ontario near Downtown, and the home of Porter Airlines? Is that... [READ LIST]?



Attitudes Towards the Airport...

- A majority (63%) of Torontonians, and those living South of Queen (65%), are personally in favour of having an airport on the island, and believe that it's good for Toronto...Roughly, 1 in 10 oppose the airport, 15% South of Queen Street...



And thinking about the Billy Bishop Toronto City Centre Airport, which of the following would best describe your attitude towards the island airport and its operations?

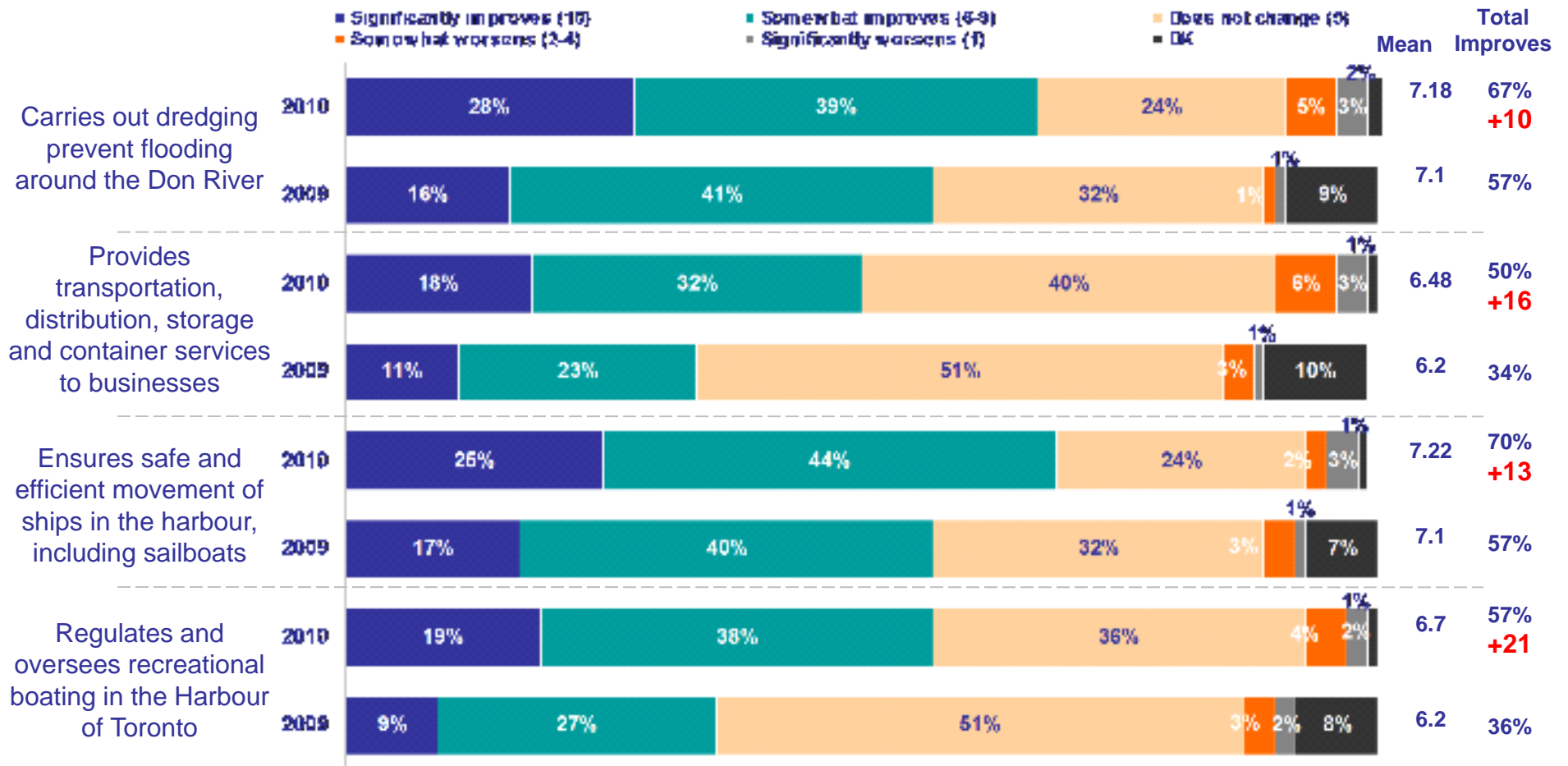


**Impression Impact: Once People Know What
TPA Does, It Can Have an Impact...**



Activity Impact on TPA Impression Ratings...

- Once informed of the activities that the TPA is involved in, most have an improved impression of the TPA, and the boost in impression in almost every instance is greater than it was last year...

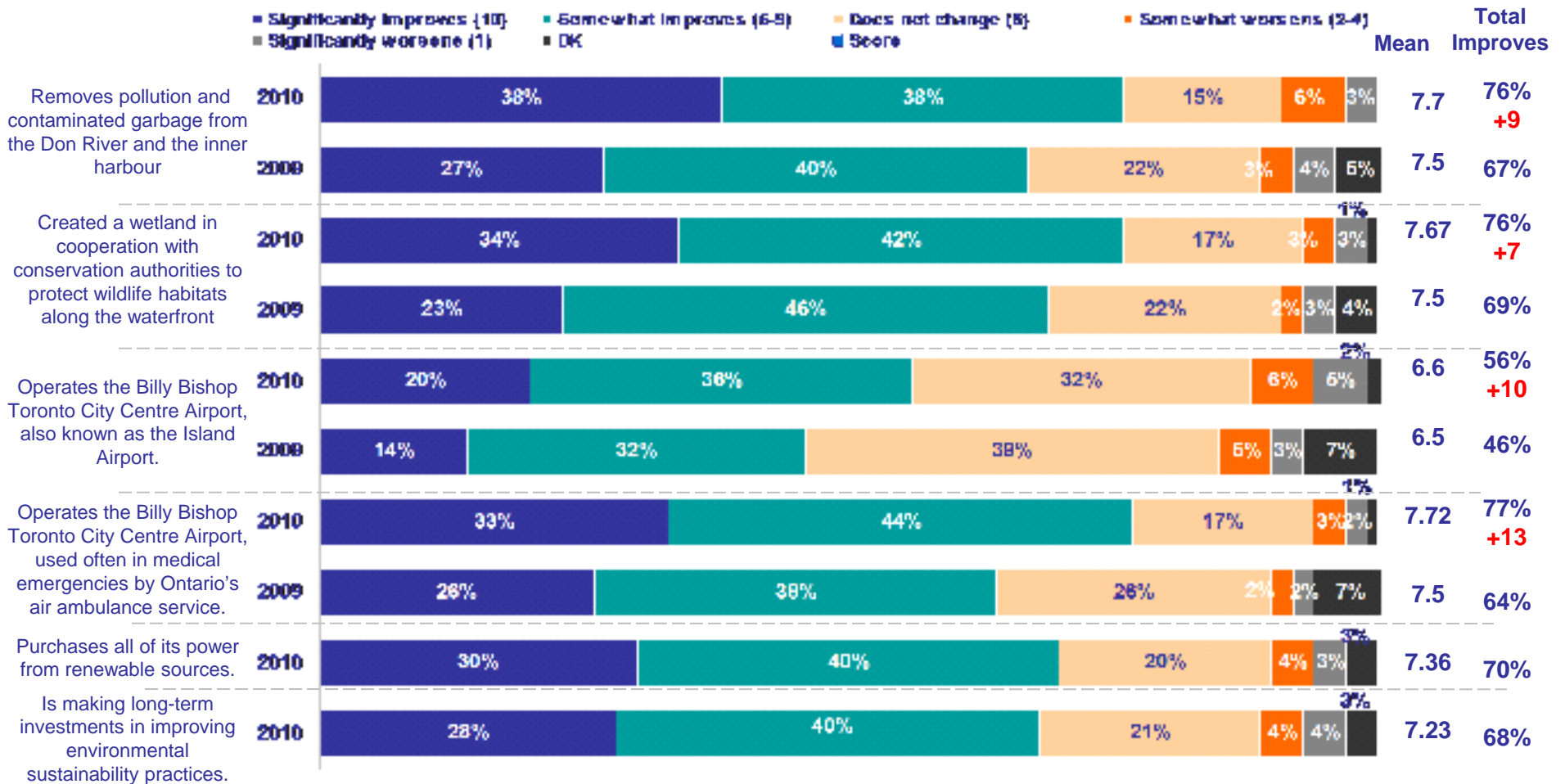


I'd like to read you a list of things that the Toronto Port Authority is responsible for. For each, please tell me whether it (ROTATE: improves or worsens) your impression of the Toronto Port Authority, using a scale from 1 to 10, where 1 means the statement "significantly worsens" your impression and 10 means the statement "significantly improves" your impression of the Toronto Port Authority. "5" means the statement does not change your impression either way.



Activity Impact on TPA Impression Rating...

■ And here as well...The last two are new...

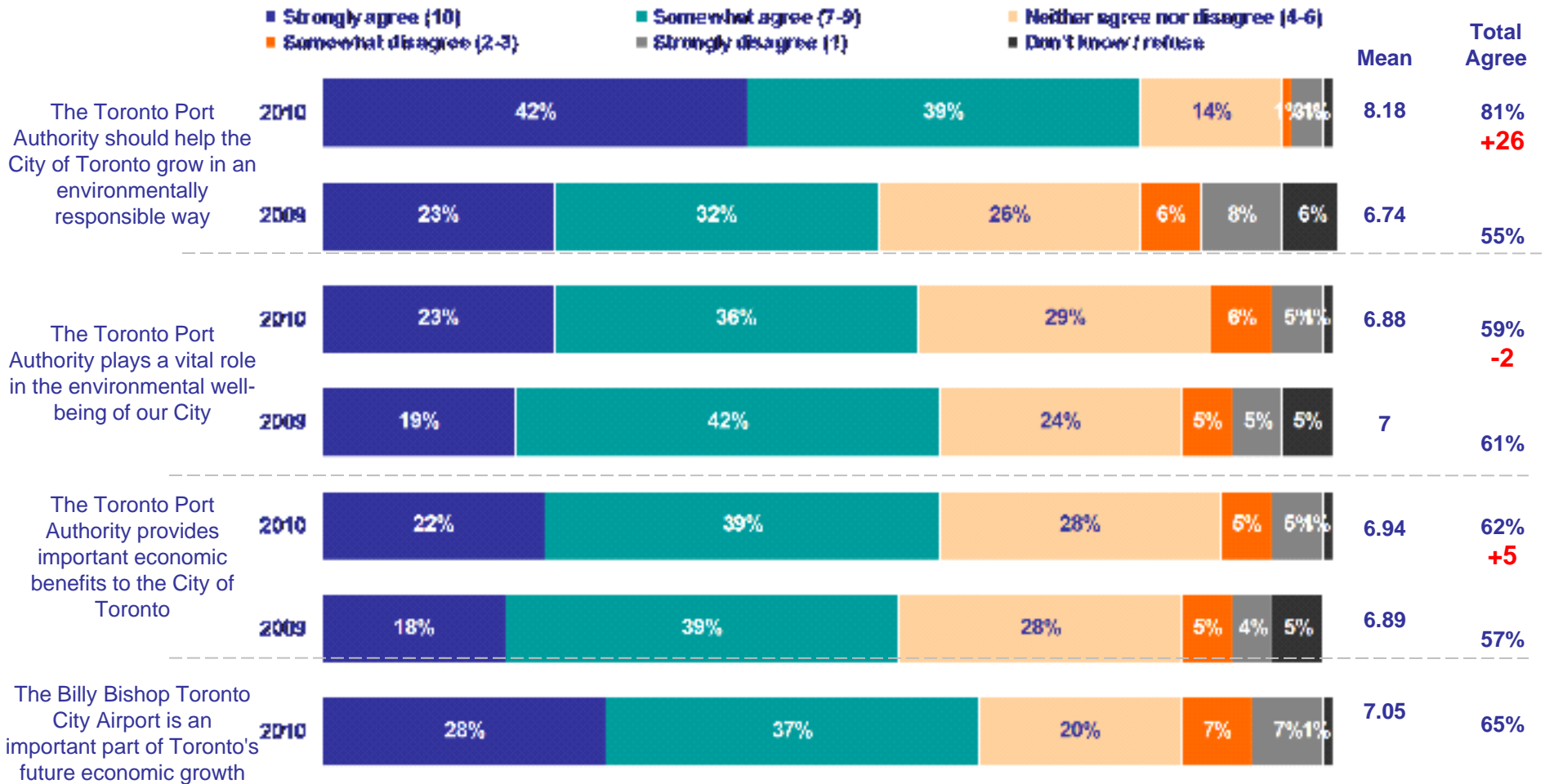


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Attitudes Regarding TPA Role / Impact...

- **Most agree that the TPA plays a vital role and that it provides economic benefits. Further, most believe the airport is important to Toronto's future economic growth...**

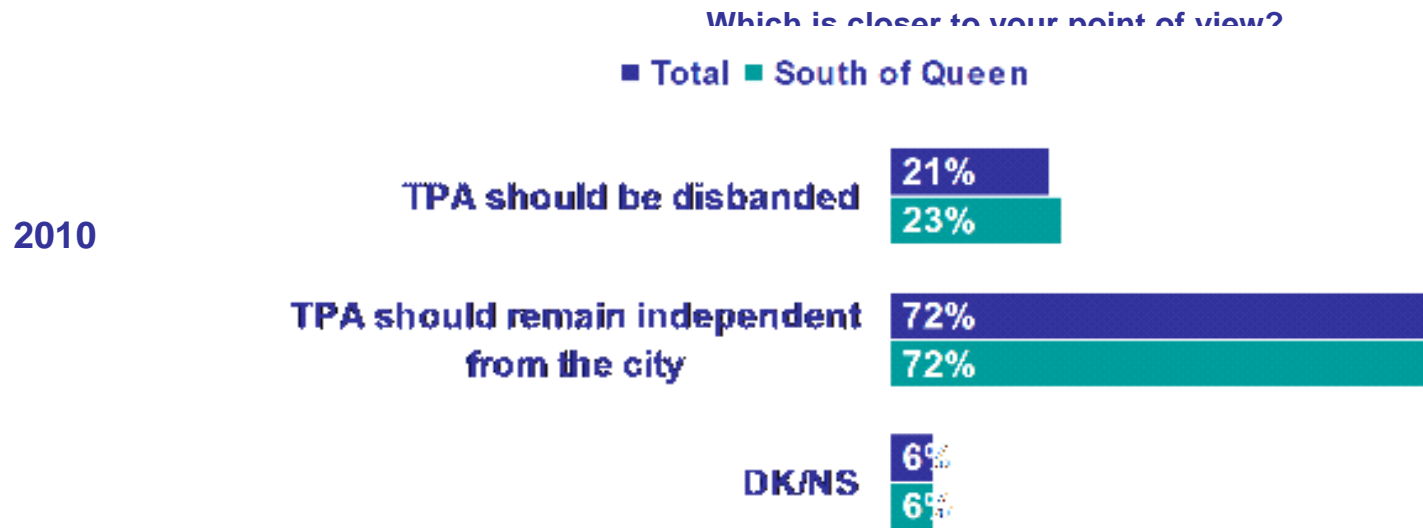


Again using a scale of 1 to 10, where 1 means you "strongly disagree" and 10 means you "strongly agree", to what extent do you agree or disagree with the following statements?



Should Toronto Port Authority Remain Independent from City of Toronto?

- Most (72%) believe the TPA should remain independent from the city, a sentiment that is consistent with last year...



Should Toronto



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Public safety in the City.

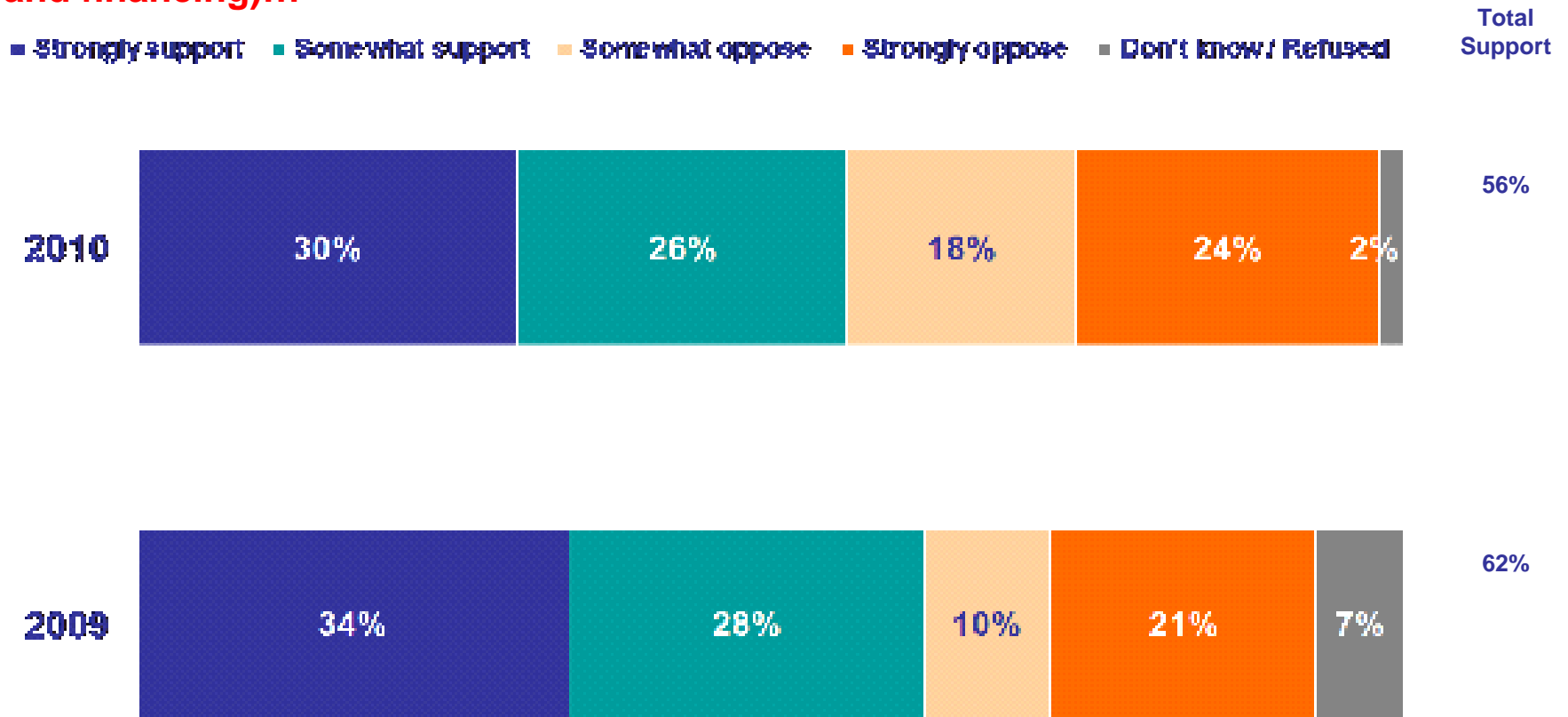


The Tunnel, The Noise and Concerns...



Support for an Airport Pedestrian Tunnel...

- A majority (56%) supports a pedestrian tunnel to the airport. Although down from last year -6 points), the questions asked were not identical (this year references the cost and financing)...



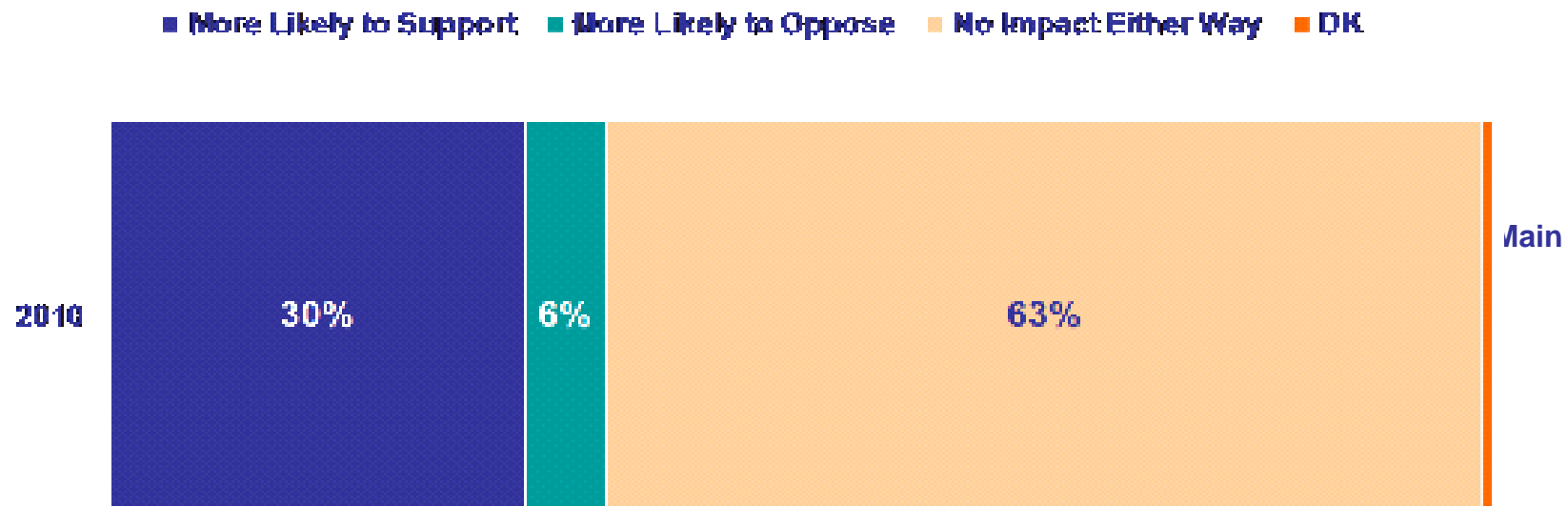
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proposed that an under the water tunnel for pedestrians only that connects the mainland to the isiana airport terminal building be constructed at a cost of approximately **\$45 million to be paid for by airport passenger user fees, not with taxpayer dollars**. Do you support or oppose the proposed construction of this pedestrian tunnel? (READ LIST)?



Would You Be More Likely To Support Or Oppose The Pedestrian Tunnel If You Knew That The Tunnel Will Also Have The Capacity To Carry A New Water Main Out To The Islands In The Harbour For Residents And Services There?

- One in three are more likely to support the tunnel knowing it had the capacity to carry a new water main to the islands.
- Few (6%) are more likely to oppose it knowing the possibilities for a water main.
- Most (63%) say this has no impact on their level of support or opposition.



And would you be more likely to support or oppose the pedestrian tunnel if you knew that the tunnel will also have the capacity to carry a new water main out to the islands in the harbour for residents and services there, or would it have no impact either way? (read list)



Statements About The Proposed Pedestrian Tunnel...

- A majority agrees that a ferry is not an efficient way (57%) to access the airport, and that a tunnel is the best way to increase access to the island airport (62%)...

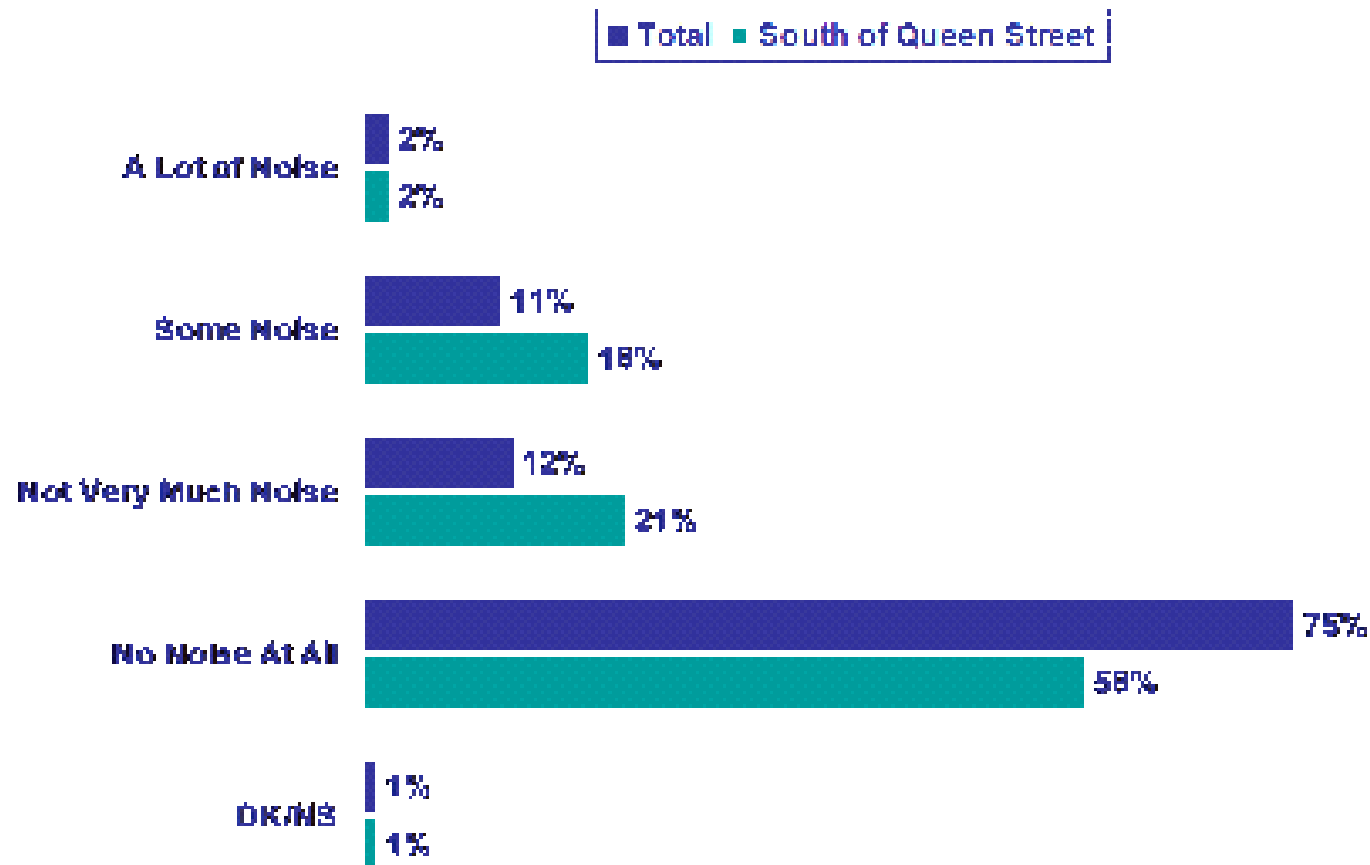


I'd like to read you some statements about the proposed pedestrian tunnel. Please tell me whether you agree very much, agree somewhat, disagree somewhat or disagree very much.



From Your Home, Do You Hear Any Sound/Noise Associated With Airplanes That Land At/Take Off From Billy Bishop Island Airport?

- **Most (75%) residents of Toronto don't hear any Toronto island airport noise at all. A majority (58%) of those living south of Queen Street don't hear any noise either. Two in ten (20%) living south of Queen hear 'some' or 'a lot' of noise....**

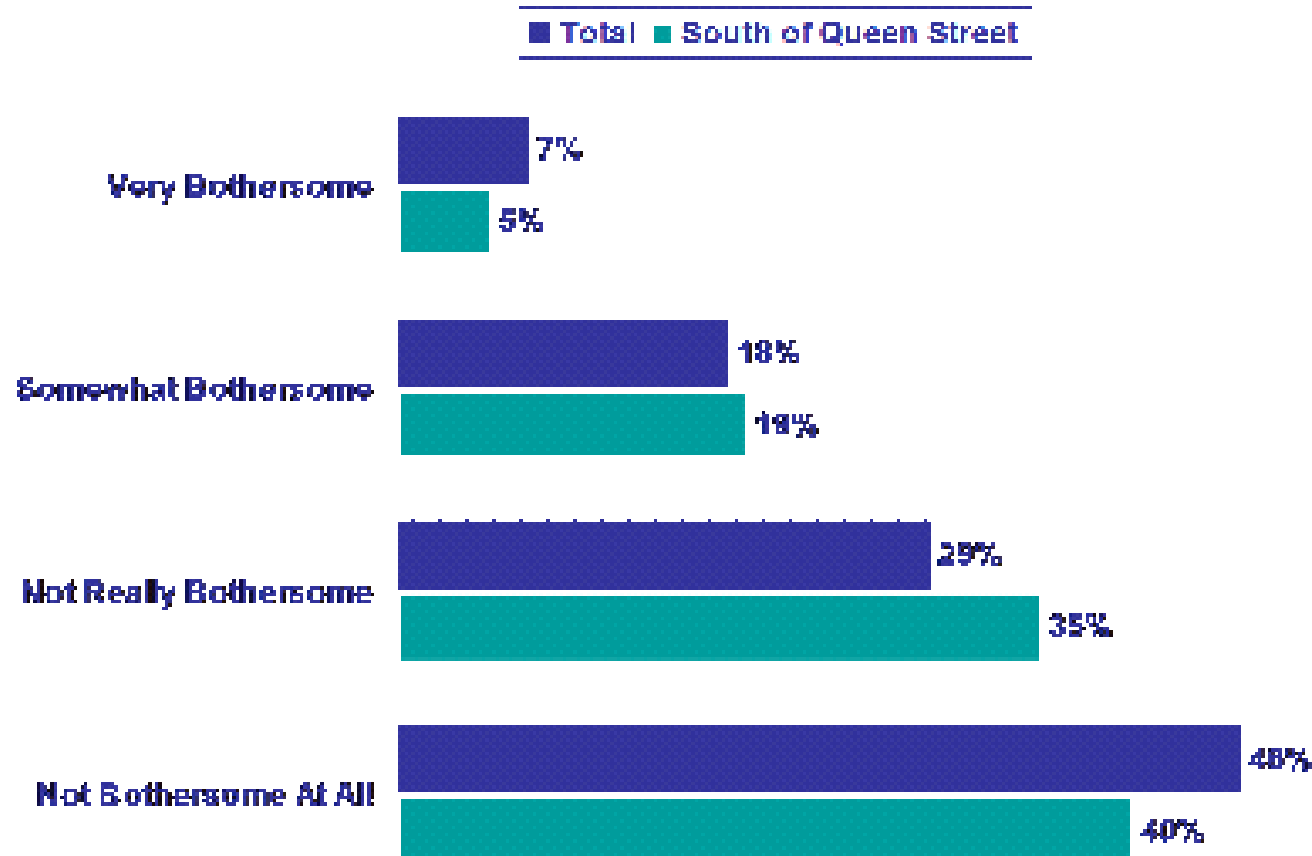


And, from your home, do you hear any sound or noise associated with the airplanes that land at, and take off from, the Billy Bishop Island Airport? (read list)



For the 25% who Hear the Noise...

- Among those that do hear noise, one quarter (25%) say it's bothersome...7% 'Very' ...

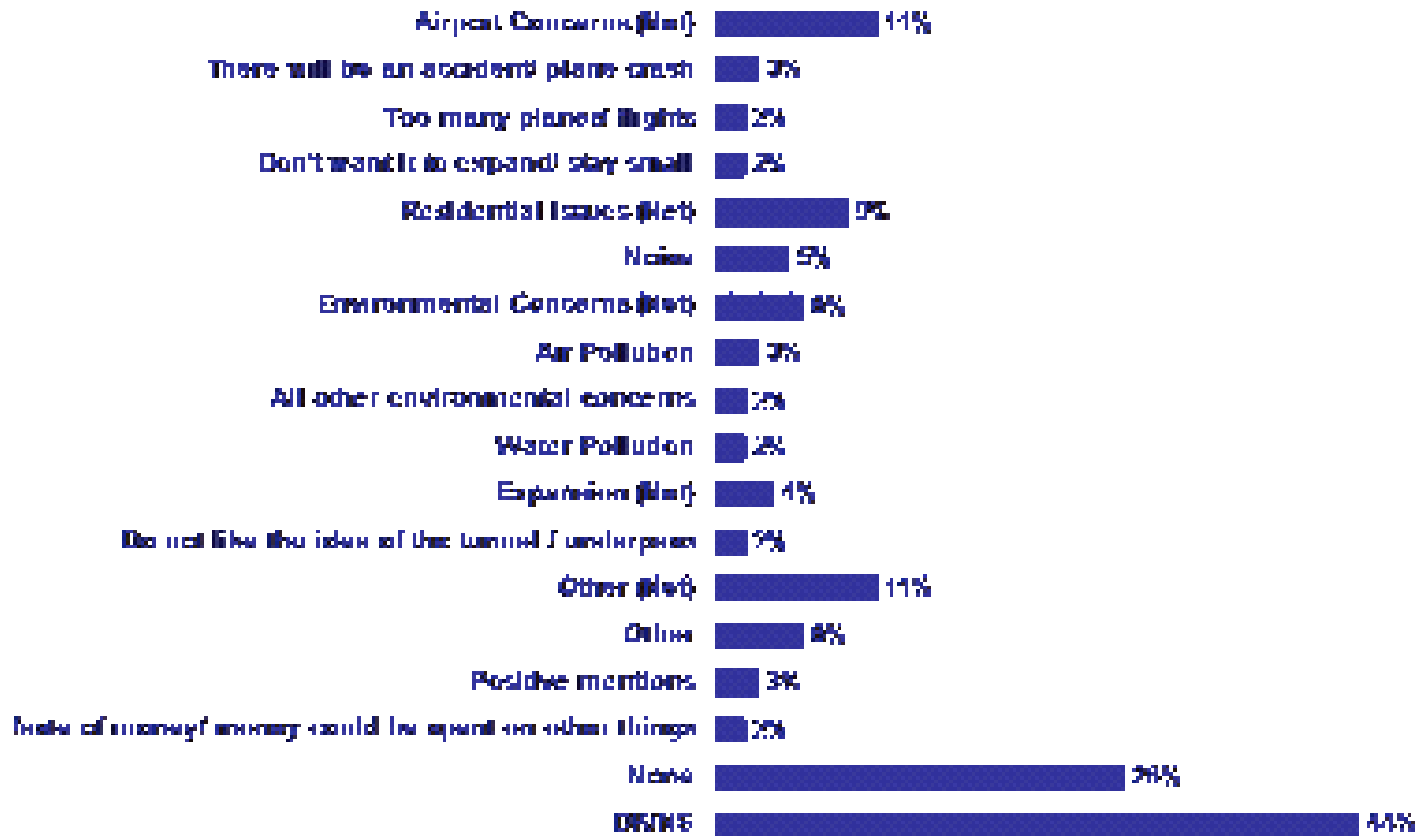


And, overall, would you say that this sound or noise is very bothersome, somewhat bothersome, not really bothersome or not bothersome at all? (read list)



Issues Or Concerns That You Have, Personally, About The Operation Or Impact Of The Billy Bishop Island Airport...

- **Unaided, the most common concerns about the airport is related to noise (5%) or environmental (6%) concerns...**



Lastly, please tell me if there are any issues or concerns that you have personally about the operation or impact of the Billy Bishop Island Airport? [OPEN ENDED: DO NOT READ LIST: **RECORD UP TO THREE MENTIONS**]



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