



Ipsos Reid

2014 Public Opinion Survey

Toronto Port Authority Tracking Study

Toronto
Port
Authority

Administration
Portuaire
de Toronto



January 2014

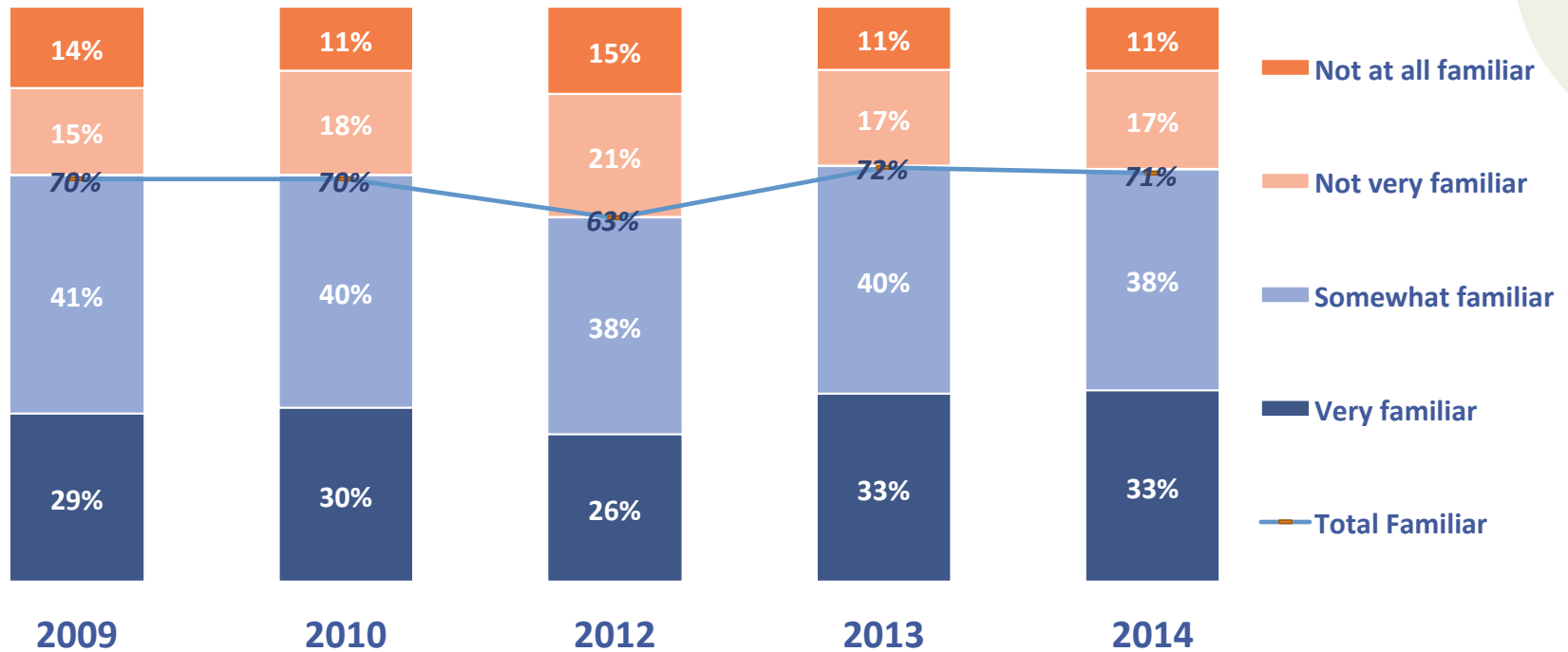
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- *These are the findings of an Ipsos Reid poll conducted on behalf of the Toronto Port Authority*
- *The study was in field from January 13th to 17th, 2014.*
- *For the survey, a representative randomly-selected sample of adult Canadians living in Toronto was interviewed by telephone, including cell-phone sample dialling. Region, 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 was also employed. The regional distribution of the sample is as such:*
 - ⇒ *Scarborough n =75*
 - ⇒ *Etobicoke n =76*
 - ⇒ *York/East York n =75*
 - ⇒ *North York n =76*
 - ⇒ *Old Toronto North of Queen n = 100*
 - ⇒ *Old Toronto South of Queen (Harbourfront) n = 300*
- *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 polled. The margin for error 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 regions it is ± 11.3 percentage points.*
- *The margin of error will be larger within regions and for other sub-groupings of the survey population. These data were weighted to ensure that the sample's regional and age/sex composition reflects that of the actual population according to Census data. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.*
- *Where possible results were compared to previous years via tracking from similar projects conducted between 2007 and 2013. These projects were all conducted in the summer of their respective year.*

Detailed Findings

Familiarity with the Billy Bishop Toronto City Airport

- Familiarity with the Billy Bishop Airport has remained consistent since 2009, currently sitting at 71%, down 1 point from the summer.



Familiarity with the Billy Bishop Toronto City Airport

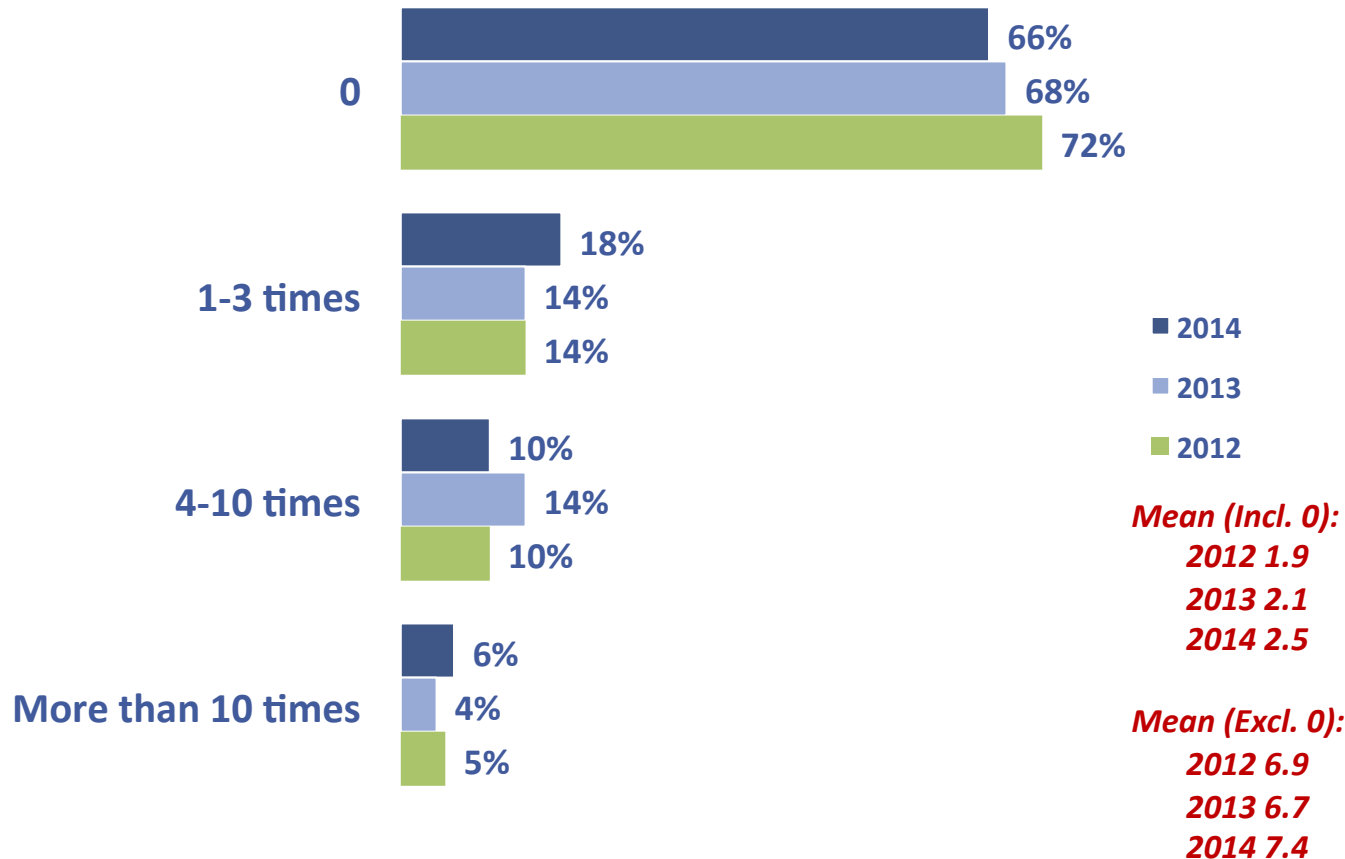
- Downtown residents (South of Queen – 89%/North of Queen – 79%) are most familiar with the airport, followed by those from North York (77%). Etobicoke (61%) and Scarborough (59%) residents are least familiar with BBTCA.

	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
<i>Base</i>	<i>(n=702)</i>	<i>(n=75)</i>	<i>(n=76)</i>	<i>(n=76)</i>	<i>(n=75)</i>	<i>(n=300)</i>	<i>(n=100)</i>
Very familiar	33%	37%	29%	22%	24%	55%	48%
Somewhat familiar	40%	34%	49%	37%	37%	34%	31%
Not very familiar	17%	16%	17%	21%	24%	8%	12%
Not familiar at all	11%	13%	6%	21%	13%	4%	6%
Total Familiar	71%	71%	77%	59%	61%	89%	79%
Total Unfamiliar	28%	29%	23%	41%	38%	11%	18%

Frequency of flying out of Billy Bishop Toronto City Airport on Toronto Island

- Flight frequency from BBTCA continues to go up as the average Torontonian has flown out of the airport 2.5 times (up 0.4 since last year), while fewer are indicating having never have flown out of the airport at all (66%, down 2 points), meaning that 34% of Torontonians have used the airport (up from 32% in the summer). Those who have flown out of BBTCA appear to be doing so more often (7.4 times, up from 6.7).

Times flown out of airport



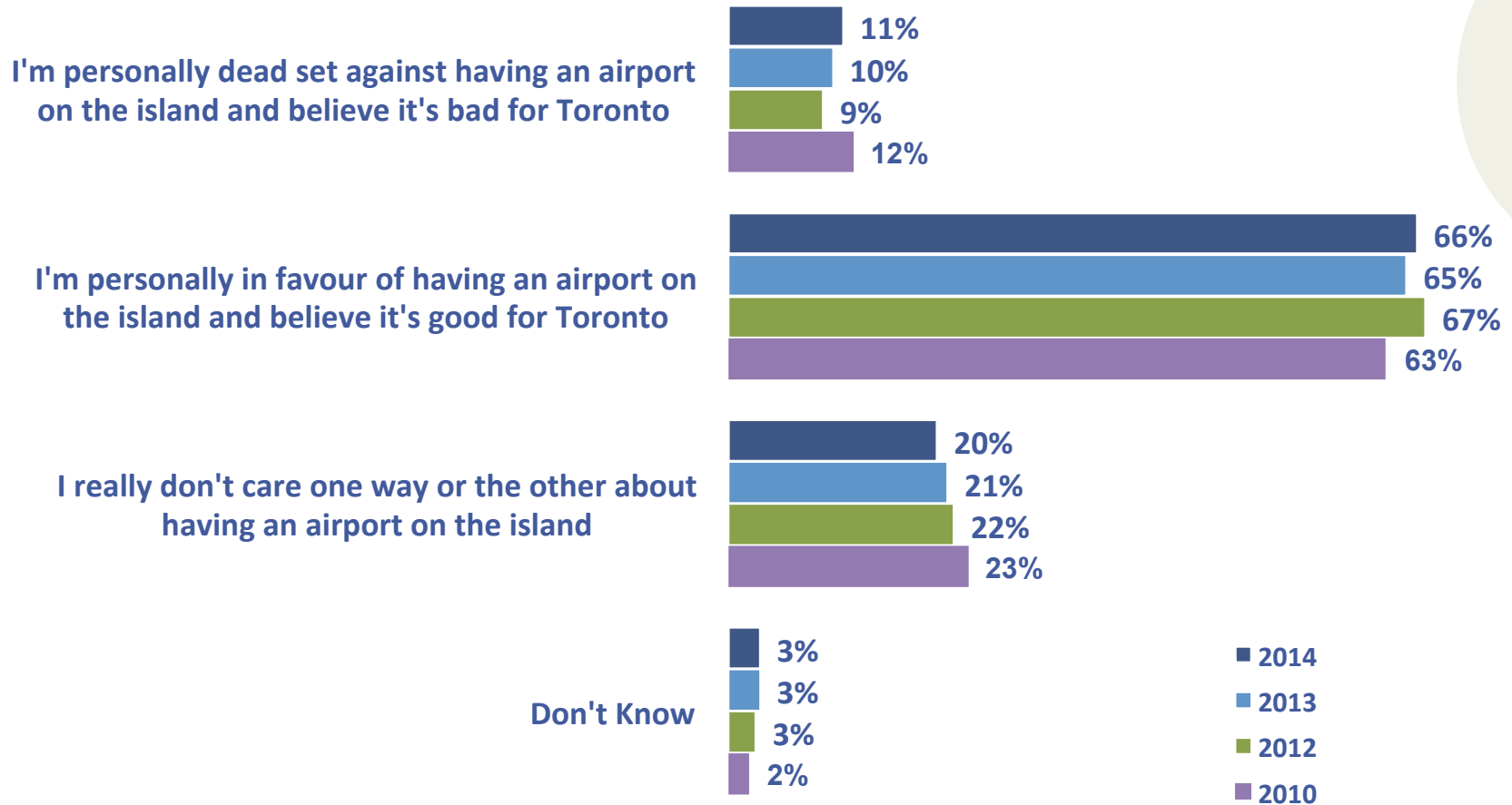
Frequency of BBTCA Use – Region

- Residents of downtown are most likely to have used the BBTCA, with those living north of Queen averaging the most flights. Scarborough and Etobicoke residents are least likely to have used the airport.

	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
<i>Base</i>	<i>(n=702)</i>	<i>(n=75)</i>	<i>(n=76)</i>	<i>(n=76)</i>	<i>(n=75)</i>	<i>(n=300)</i>	<i>(n=100)</i>
0	66%	65%	67%	78%	69%	54%	55%
1-3 times	18%	16%	20%	14%	24%	23%	14%
4-10 times	10%	12%	9%	4%	5%	14%	19%
More than 10 times	6%	8%	4%	4%	3%	10%	12%
Mean use	2.5	2.8	1.7	1.3	1.2	3.9	5.2

Attitudes Towards the Airport

- Attitudes about the airport have remained consistent since 2010 as two in three (66%, up 1 point) are in favour of having an airport on the island and that its good for the city, with just one in ten (11%) dead set against the airport and believe it's bad for Toronto.



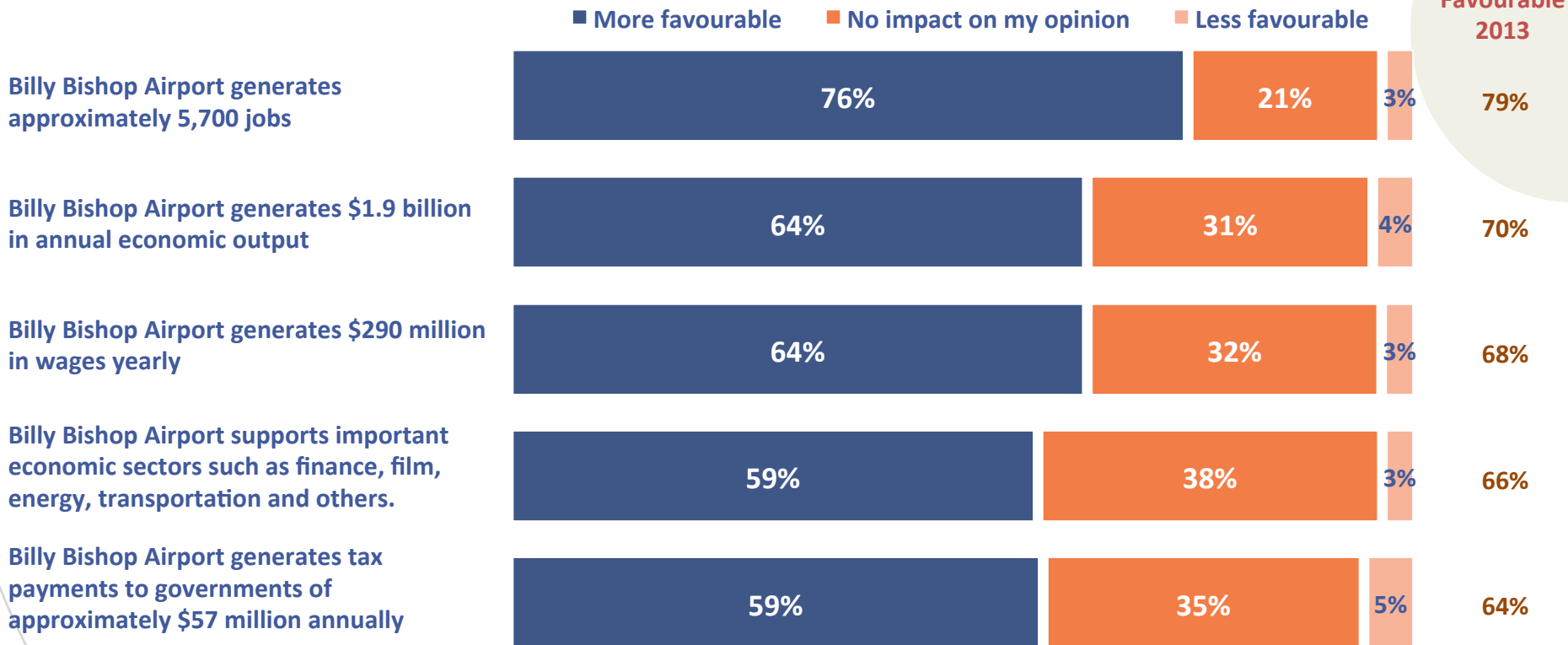
Attitudes Towards the Airport

- The airport receives support from a majority of residents in every part of the city.

	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
<i>Base</i>	<i>N = 702</i>	<i>(n=75)</i>	<i>(n=76)</i>	<i>(n=76)</i>	<i>(n=75)</i>	<i>(n=300)</i>	<i>(n=100)</i>
I'm personally dead set against having an airport on the island and believe it's bad for Toronto	11%	13%	12%	8%	9%	12%	14%
I'm personally in favor of having an airport on the island and believe it's good for Toronto	66%	71%	67%	61%	66%	70%	66%
I really don't care one way or the other about having an airport on the island	20%	16%	18%	25%	24%	14%	18%

Favourability Towards the Airport

- City residents are slightly less likely to indicate that the following messages make their opinion of the BBTCA more favourable compared to the summer, although a majority still have a more favourable opinion of the airport overall.



Q6: Recently, a study gauging the economic impact of the Billy Bishop Toronto City Airport was conducted and released. I'm going to read a list of a few things that the study found, and I'd like you to tell me if that makes you more favourable or less favourable towards the airport, or whether it doesn't impact your opinion either way:

Base: All Respondents 2014 n=702



Business Vs. Personal Use

- Four in ten (38%) users use the airport exclusively for pleasure travel; one quarter (24%) use it exclusively for business, with the rest using it for a mix. Overall, more Torontonians use it more for pleasure than for business, although this is NOT weighted by frequency of airport use, and doesn't take into consideration trips originating outside of Toronto.

				Mean	2013
Business	0%		38%	42.3	41.1
	100%		24%		
Pleasure	0%		24%	57.7	58.9
	100%		38%		

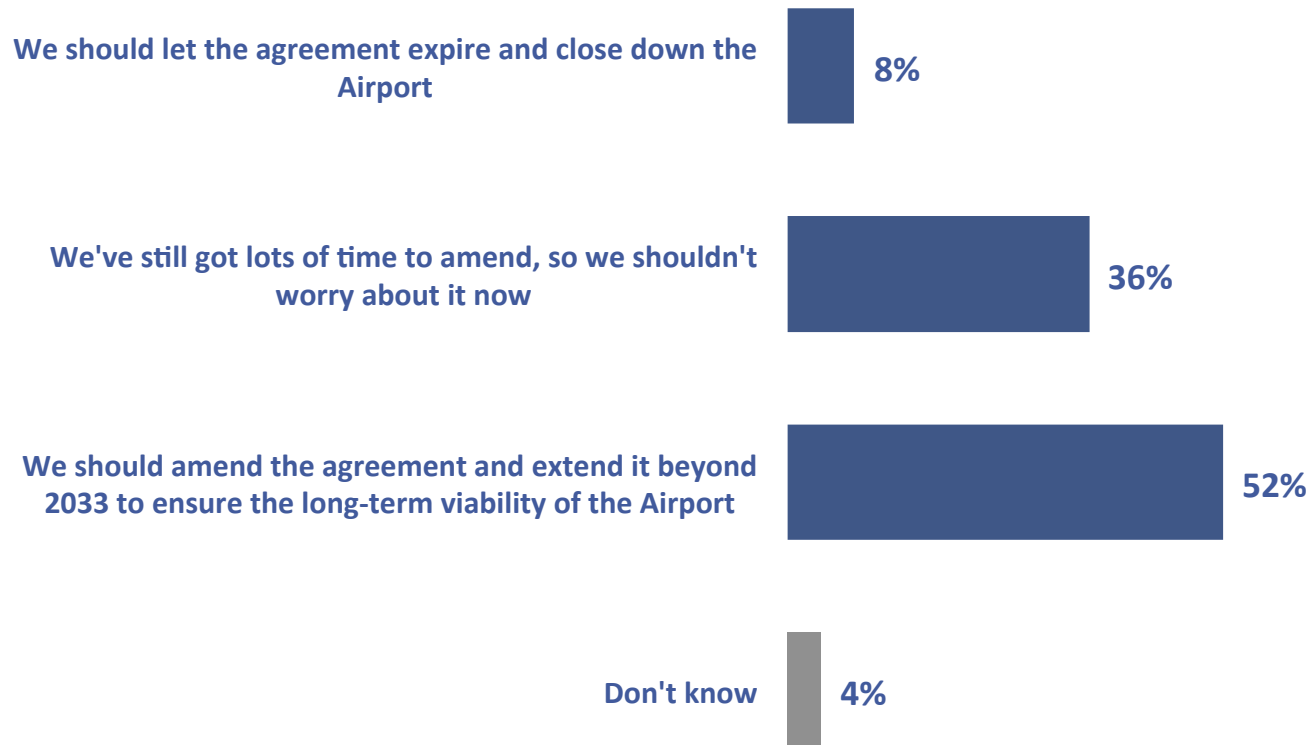
Mean Incl 0	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
<i>Base</i>	(n=293)	(n=28)	(n=25)	(n=19)	(n=19)	(n=149)	(n=53)
Business							
0%	38%	50%	18%	50%	64%	38%	31%
100%	24%	27%	37%	31%	14%	25%	14%
Mean	42.3	36.9	54.8	39.3	24.8	44.8	42.3
Pleasure							
0%	24%	27%	37%	31%	14%	25%	13%
100%	38%	50%	18%	50%	64%	37%	31%
Mean	57.7	63.1	45.2	60.7	75.2	55	57.7

Q7. You've told me that you have flown out of Billy Bishop Toronto City Airport. What percentage of your trips would you say are for business, and what percentage of your trips are for pleasure or personal use?

Base: Respondents who have flown out of BBTCA n=293

Extension of Tripartite Agreement

- A majority (52%) believes that the Tripartite Agreement should be amended and extended beyond 2033 to ensure the long-term viability of the airport, compared to fewer than one in ten (8%) who believe the City should let the agreement expire and close the airport.



Extension of Tripartite Agreement

- Most of those living in North York (57%), Etobicoke (55%) and downtown, south of Queen St. (53%) believe the agreement should be extended, while those living in York/East York (12%) are most likely to believe that it should expire.

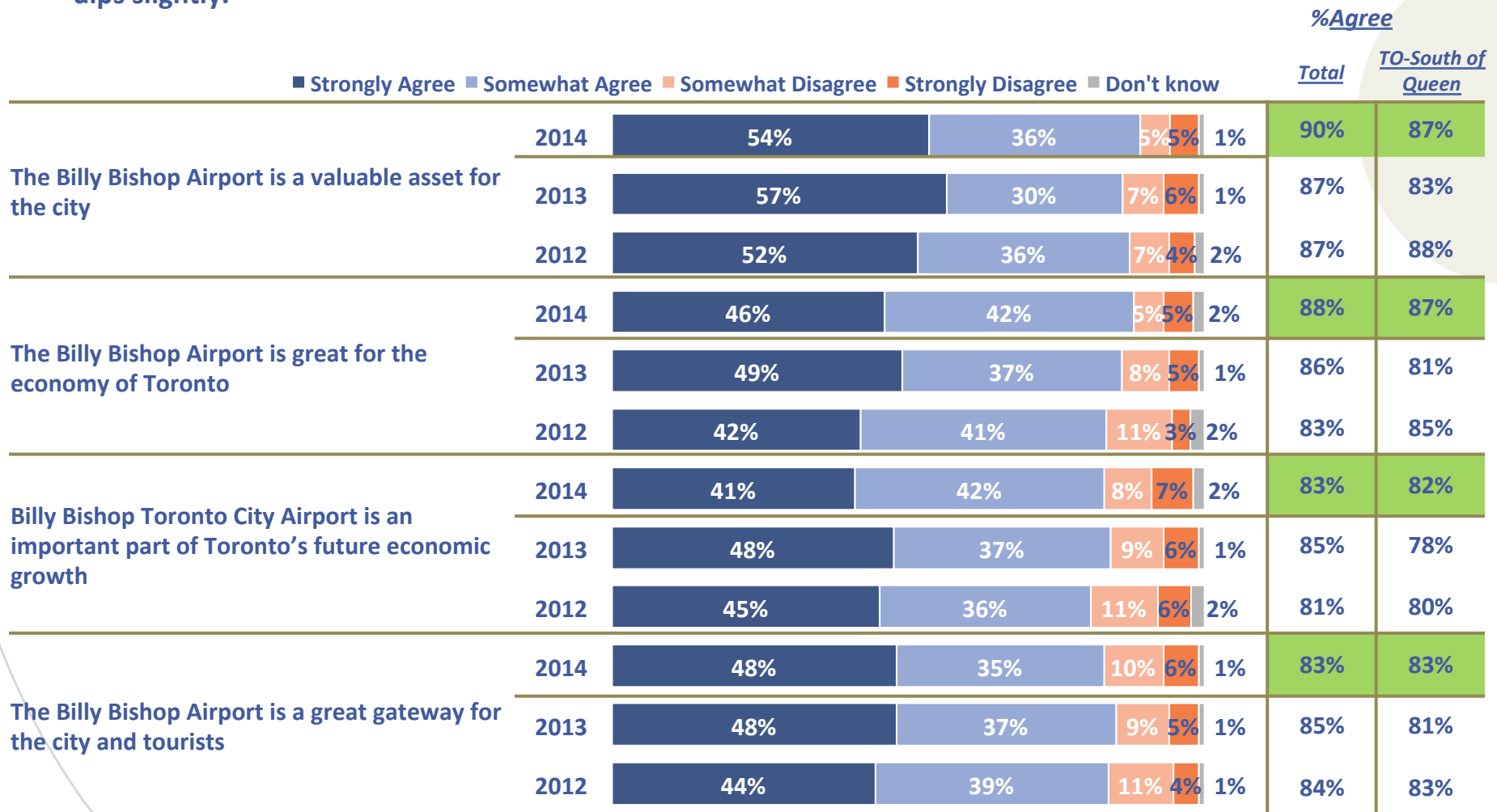
	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
<i>Base</i>	<i>N = 702</i>	<i>(n=75)</i>	<i>(n=76)</i>	<i>(n=76)</i>	<i>(n=75)</i>	<i>(n=300)</i>	<i>(n=100)</i>
We should let the agreement expire and close down the Airport	8%	12%	9%	8%	6%	10%	6%
We've still got lots of time to amend, so we shouldn't worry about it now	36%	36%	32%	35%	38%	36%	43%
We should amend the agreement and extend it beyond 2033 to ensure the long-term viability of the Airport	52%	48%	57%	49%	55%	53%	49%
Don't Know	4%	4%	2%	8%	2%	1%	2%

Q8. In the year 2033, the Tripartite Agreement that governs Billy Bishop Toronto City Airport is set to expire. Without renewing the agreement, the Billy Bishop Toronto City Airport will cease to operate. Which of the following is closest to your point of view?

Base: All respondents n=702

Thoughts about TPA and Billy Bishop Airport

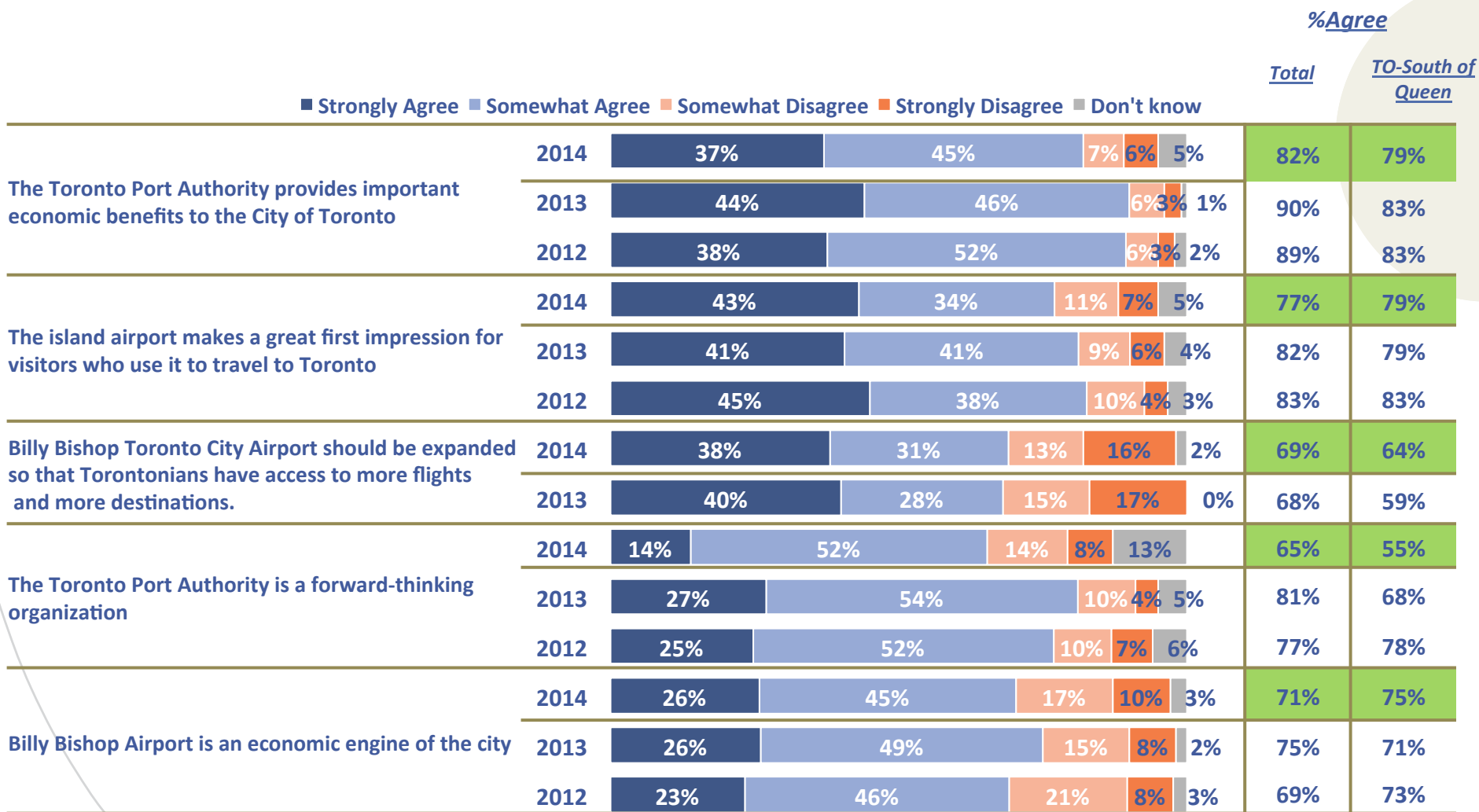
- More residents believe that the airport is a valuable asset for the city (90%, up 3 points) and that its great for the economy of Toronto (88%, up 2 points) compared to last year. These gains continue among residents living downtown south of Queen. In other areas, agreement with these attitudes holds relatively steady or dips slightly.





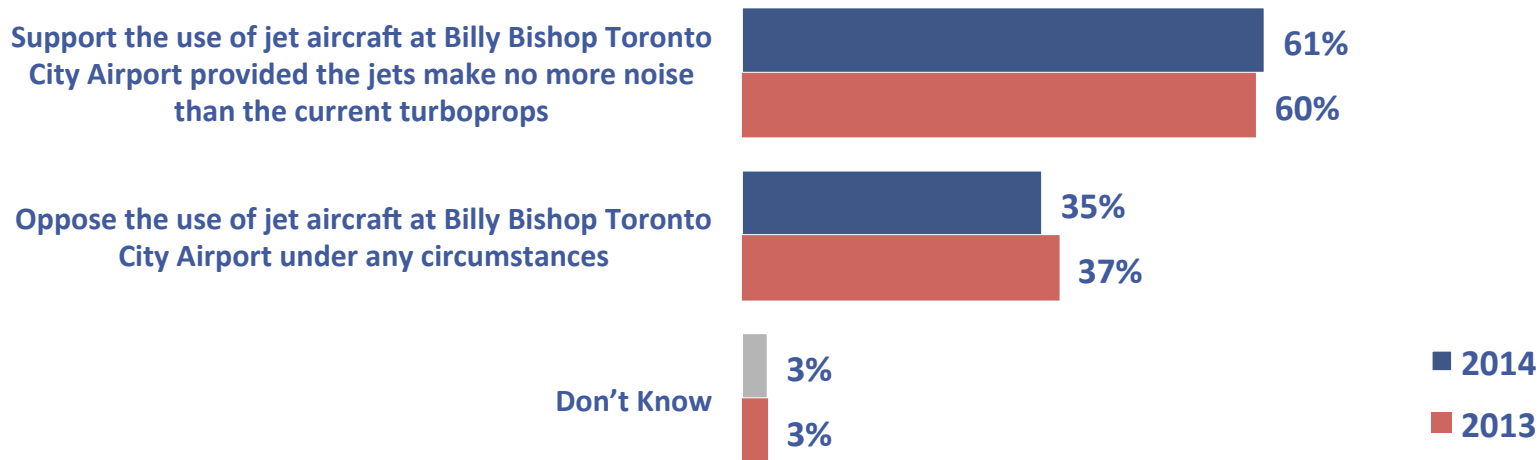
Thoughts about TPA and Billy Bishop Airport

- Downtown residents living south of Queen St. are more likely than they used to be to believe that the BBTCA should be expanded so residents have access to more flights and destinations (64%, up 5 points).



Support for Use of Jet Aircraft at BBTCA

- Support for use of jet aircraft at BBTCA (provided they make no more noise than current turboprops) remains consistent at about three in five (61%, up 1 point) versus about one-third (35%, down 2 points) who oppose.



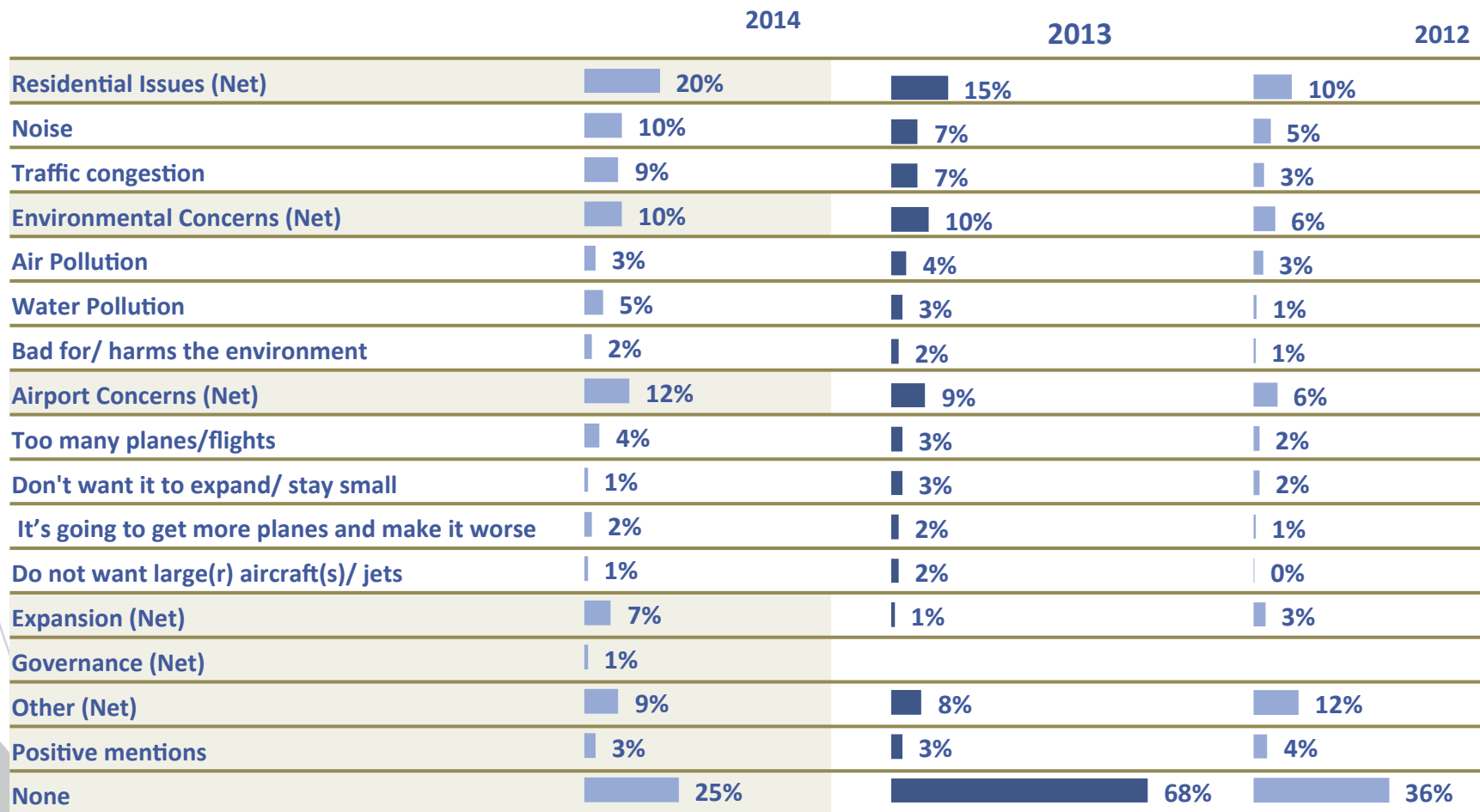
	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
<i>Base</i>	(n=702)	(n=75)	(n=76)	(n=76)	(n=75)	(n=300)	(n=100)
Support the use of jet aircraft at Billy Bishop Toronto City Airport provided the jets make no more noise than the current turboprops	61%	68%	61%	57%	60%	63%	64%
Oppose the use of jet aircraft at Billy Bishop Toronto City Airport under any circumstances	35%	30%	36%	39%	37%	35%	31%
Don't Know	3%	2%	3%	4%	3%	3%	5%

Q10. Some people support the use of jet aircraft at the Billy Bishop Toronto City Airport and say that it would increase competition and lower prices for flights out of Toronto, give Torontonians more access to more destinations, and help the Canadian economy and aerospace companies like Bombardier due to increased manufacturing orders for jet aircraft. Other people oppose the use of jet aircraft at BBTCA and say that allowing jets to fly out of Billy Bishop Toronto City Airport would lead to more noise coming from the airport and skies, require a runway extension, increase traffic congestion due to higher passenger volumes, and open the door for other airlines to fly jets out of the Billy Bishop Toronto City Airport. Which is closer to your point of view?

Base: All respondents n = 702

Concerns about the Impacts of the Billy Bishop Toronto City Airport

Concerns relating to residential issues have increased over the last two years (noise and traffic congestions), as have concerns relating to the airport – in particular, concerns about airport expansion.

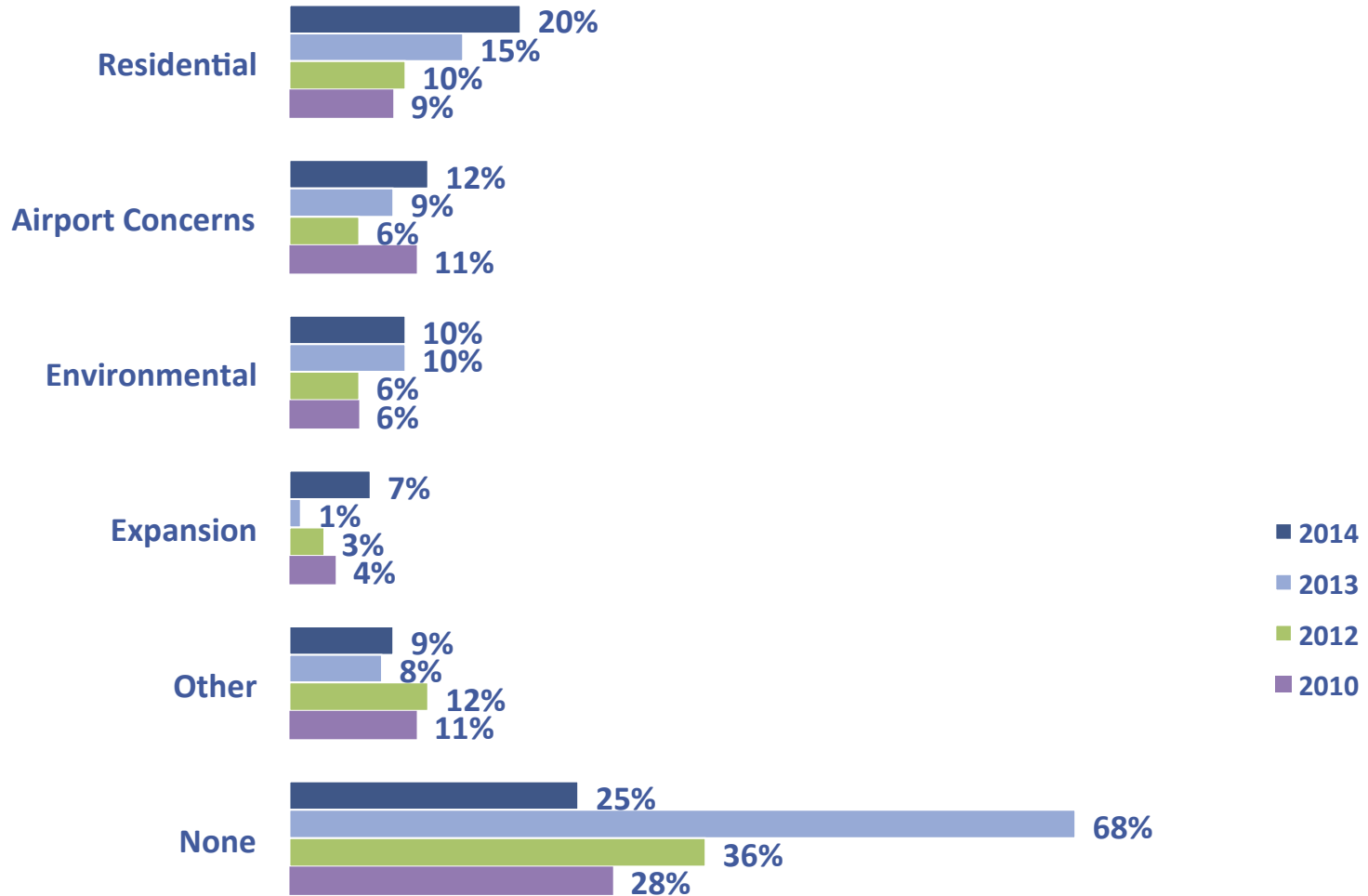


Q11: Lastly, please tell me if there are any issues or concerns that you have personally about the operation or impact of the Billy Bishop Toronto City Airport?

Base: All Respondents 2014 n=702

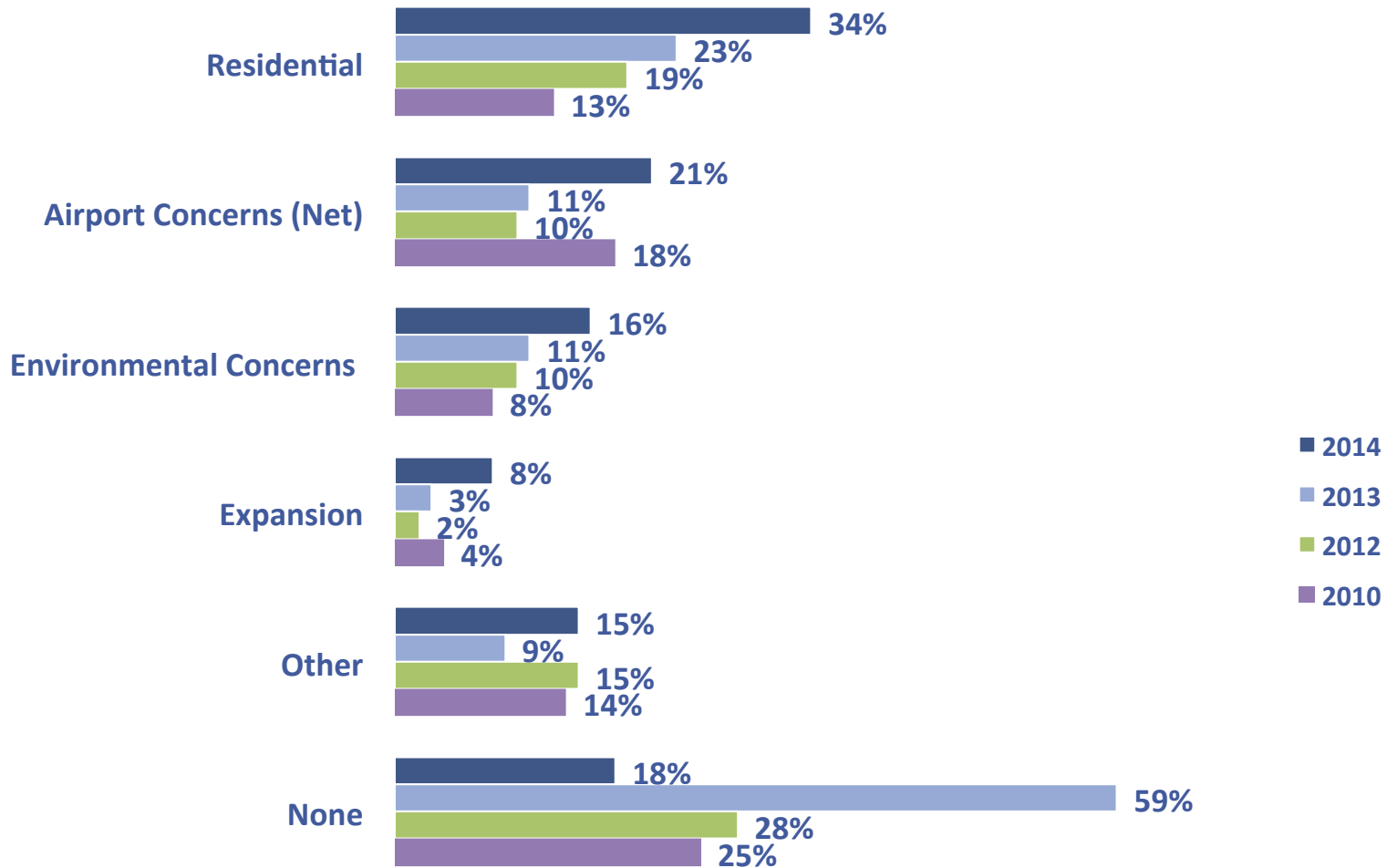
Concern Tracking

In aggregate, residential, airport and expansion concerns have expanded, while environmental concerns relating to the BBTCA have remained consistent since the summer.



Concern Tracking – South of Queen

South of Queen street, concern is up relating to residential, airport, environmental and expansion issues.



Q11: Lastly, please tell me if there are any issues or concerns that you have personally about the operation or impact of the Billy Bishop Toronto City Airport?
 Base: All Respondents n= 702

Demographics



Weighted Demographics

Education

Elementary school	1%
High school	16%
Community college	17%
University	38%
Post-graduate/ Professional	29%
(DK/NS)	-

Income

Under \$30,000	7%
\$30,000 to just under \$60,000	16%
\$60,000 to just under \$100,000	31%
\$100,000 or more	37%
Don't Know	9%

Gender

Male	48%
Female	52%

Generation

Male 18 To 34	16%
Male 35 To 54	20%
Male 55+	12%
Female 18 To 34	14%
Female 35 To 54	19%
Female 55+	19%

Regions of Residents

Scarborough	23%
Etobicoke	14%
East York/York	11%
North York	25%
North of Queen St.	20%
South of Queen St.	7%



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