



Ipsos Reid

# Toronto Port Authority

Ipsos Reid Annual Public Opinion Survey 2012



**August 2012**

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## Methodology

- These are the findings of an Ipsos Reid poll conducted on behalf of the Toronto Port Authority
- The study was in field from July 24 to August 5, 2012.
- For the survey, a representative randomly-selected sample of adult Canadians living in Toronto was interviewed by telephone. 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:
- Total n = 700
  - ⇒ Scarborough n =75
  - ⇒ Etobicoke n =75
  - ⇒ York/East York n =75
  - ⇒ North York n =75
  - ⇒ 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  $\pm 3.7$  percentage points, 19 times out of 20, of what they would have been had the entire adult population of Canada been polled. The margin for error in the South of Queen district is  $\pm 5.7$  percentage points, in Old Toronto North of Queen it is  $\pm 9.8$  percentage points, and in the other regions it is  $\pm 11.3$  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 Canadian 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 2010.

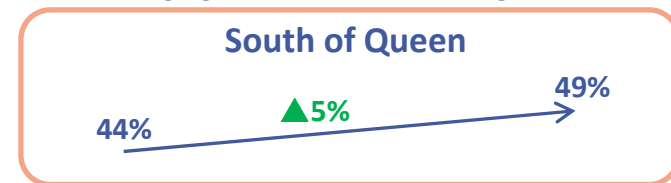
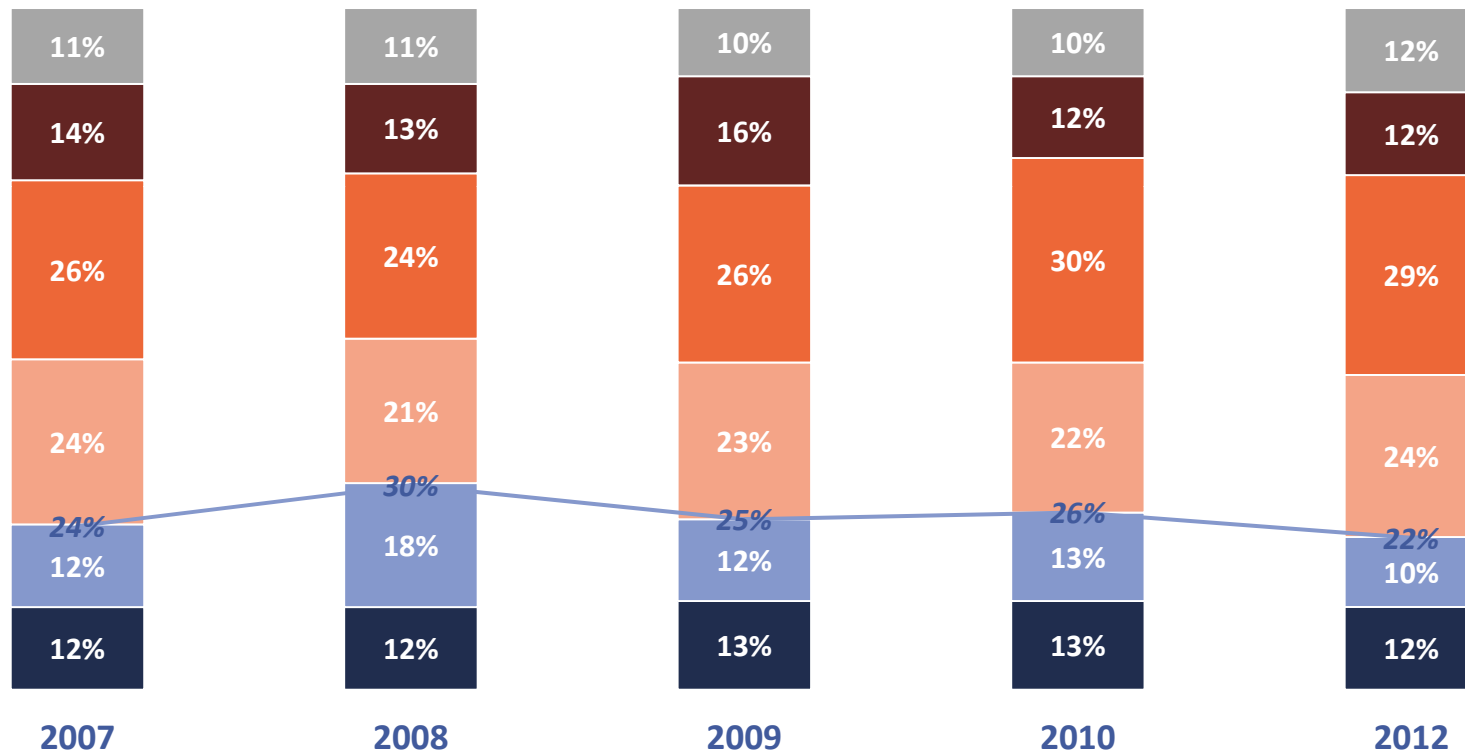
# Detailed Findings



## Frequency of Visiting the Waterfront Area in Toronto

- The proportion of Torontonians, overall, who frequently visit Toronto's waterfront area (22%) has not increased over the last five years. But more people who live south of Queen Street are visiting more often (49%, up from 44%).

■ At least once a week ■ 2 to 3 times a month ■ 4 to 6 times a year ■ 1 to 2 times a year ■ Less than once a year ■ Never



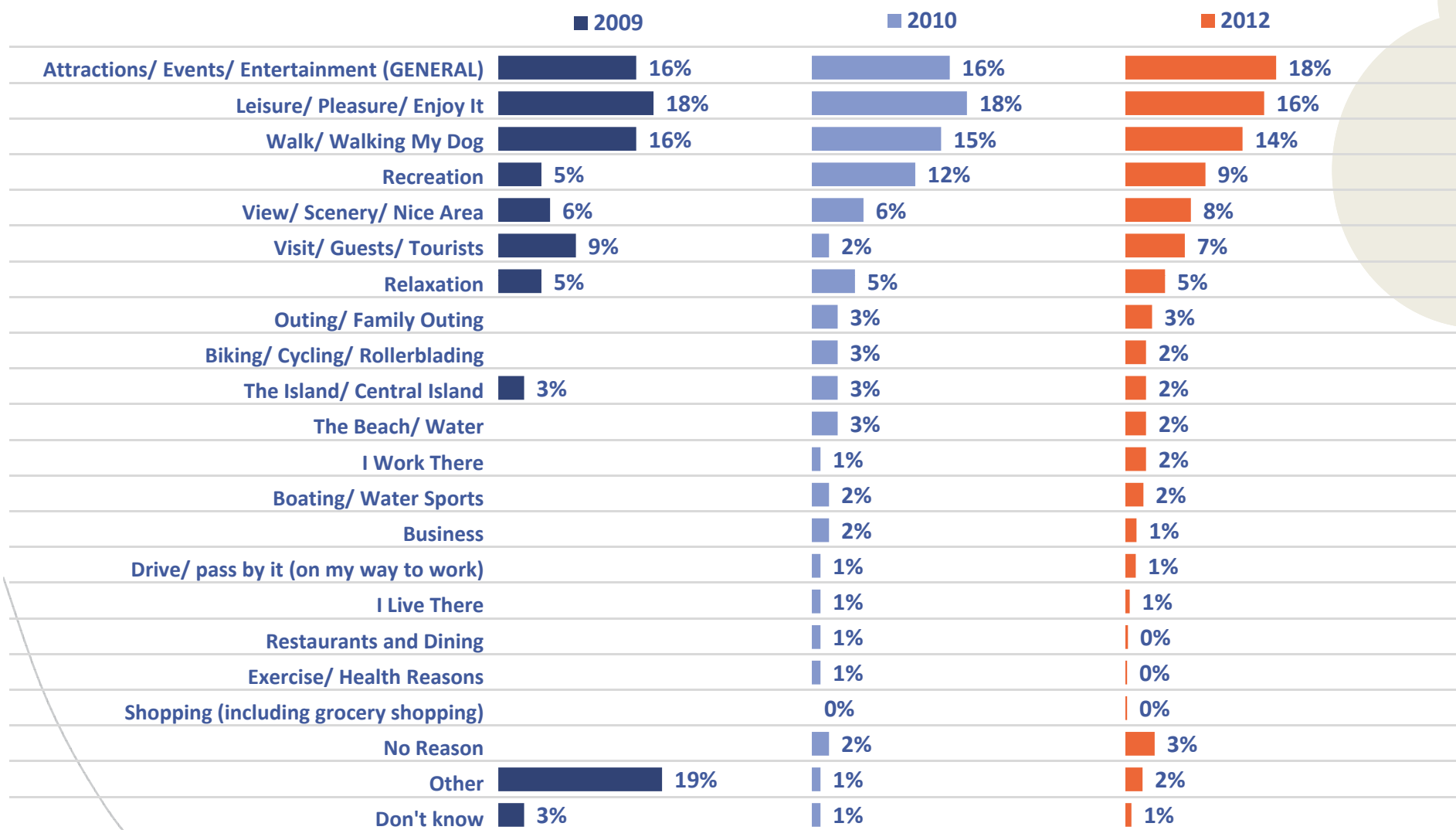
Q: Roughly how often would you say you visit the waterfront area in Toronto?

Base: All Respondents 2012 n=700



## Reasons for Visiting the Waterfront Area in Toronto

- The top reasons for visiting Toronto's waterfront area have remained consistent over the last three years.



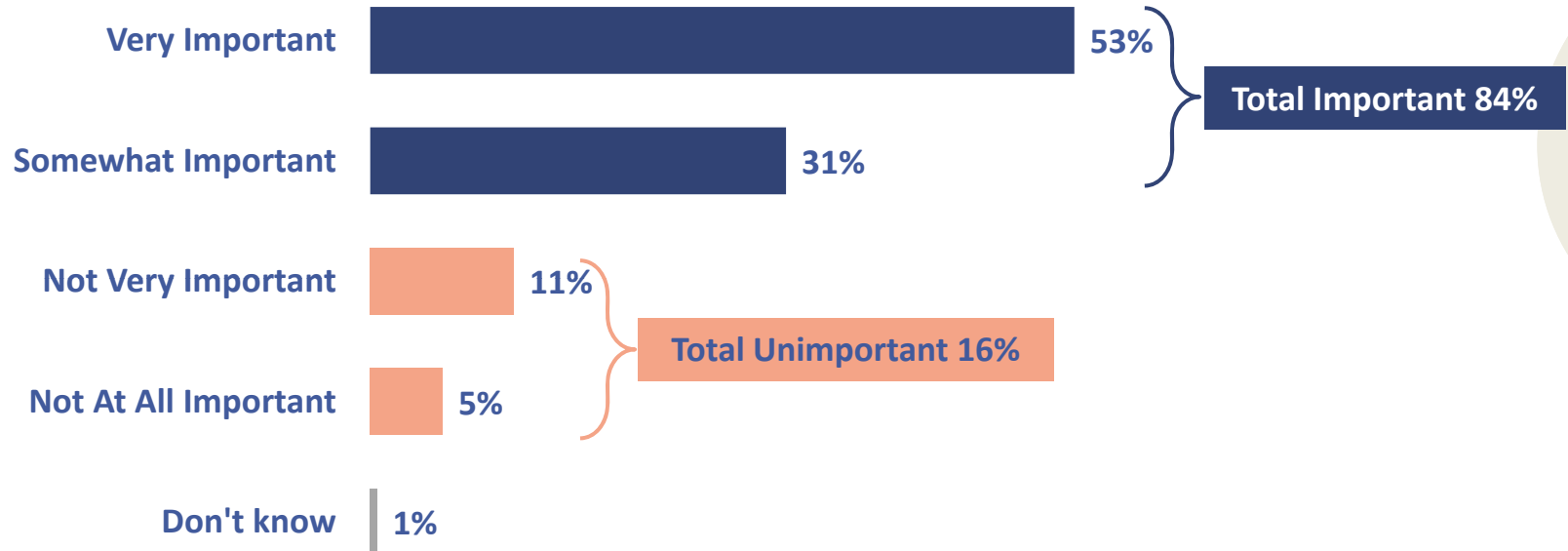
Q: What is the main reason you visit the waterfront?

Base: Respondents who visited the waterfront area in Toronto n=626



## Importance of Improving Toronto's Waterfront

- A majority (53%) describe improving Toronto's waterfront as 'very important' to them, while over eight in ten (84%) find it to be 'important' (53% very/31% somewhat), overall. Less than two in ten (16%) think improving the waterfront area is 'unimportant' (5% not at all/11% not very).



	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
Base	700	75	75	75	75	300	100
Very Important	53%	51%	44%	40%	57%	62%	71%
Somewhat Important	31%	38%	28%	43%	23%	31%	23%
Total Important	84%	90%	73%	83%	79%	93%	94%

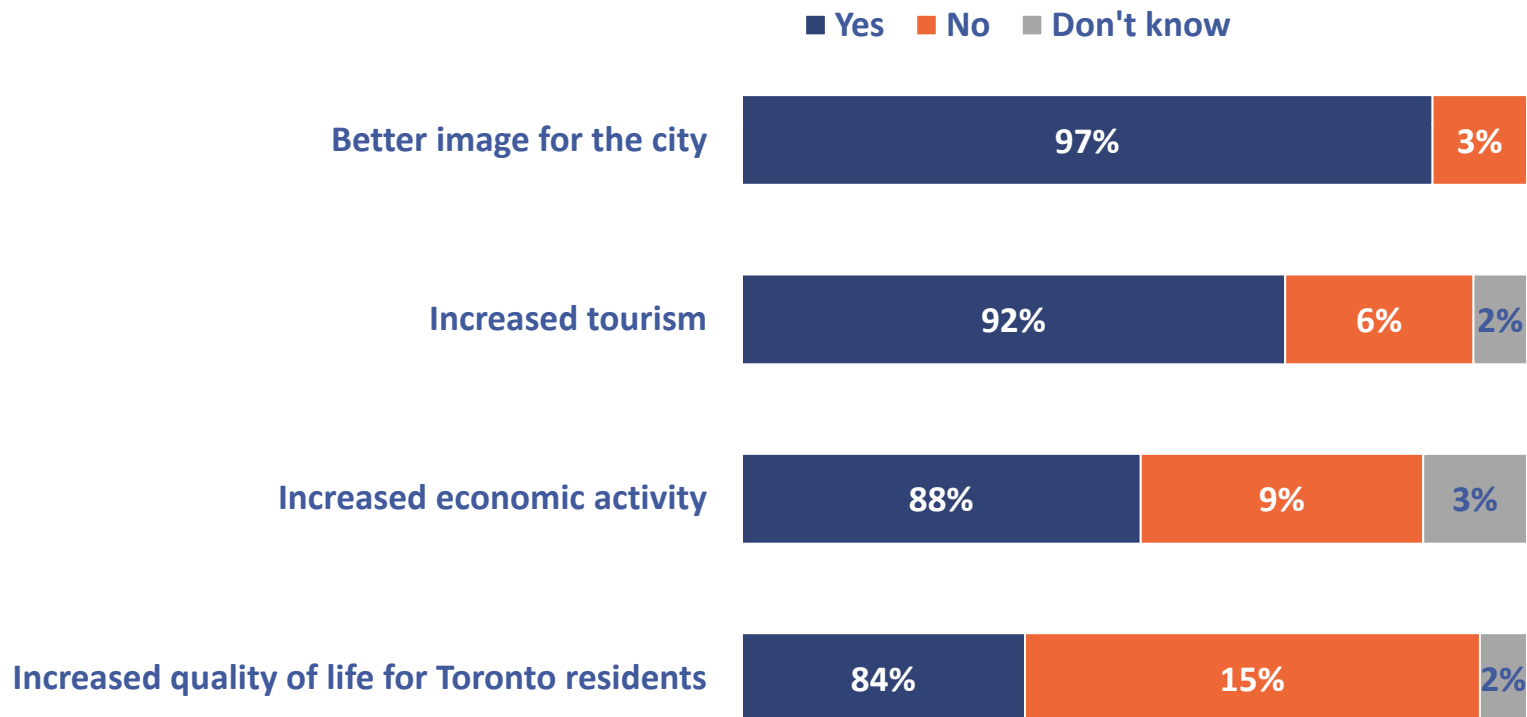
Q: How important is improving Toronto's waterfront to you? Is it... ?

Base: All Respondents 2012 n=700



## Benefits of an Improved Waterfront

- Almost all (97%) Torontonians believe that having an improved waterfront could create a better image for the city. Nine in ten say that It could increase tourism (92%) and economic activity (88%). Eight in ten (84%) believe that an improved waterfront could lead to an increased quality of life for Toronto residents.



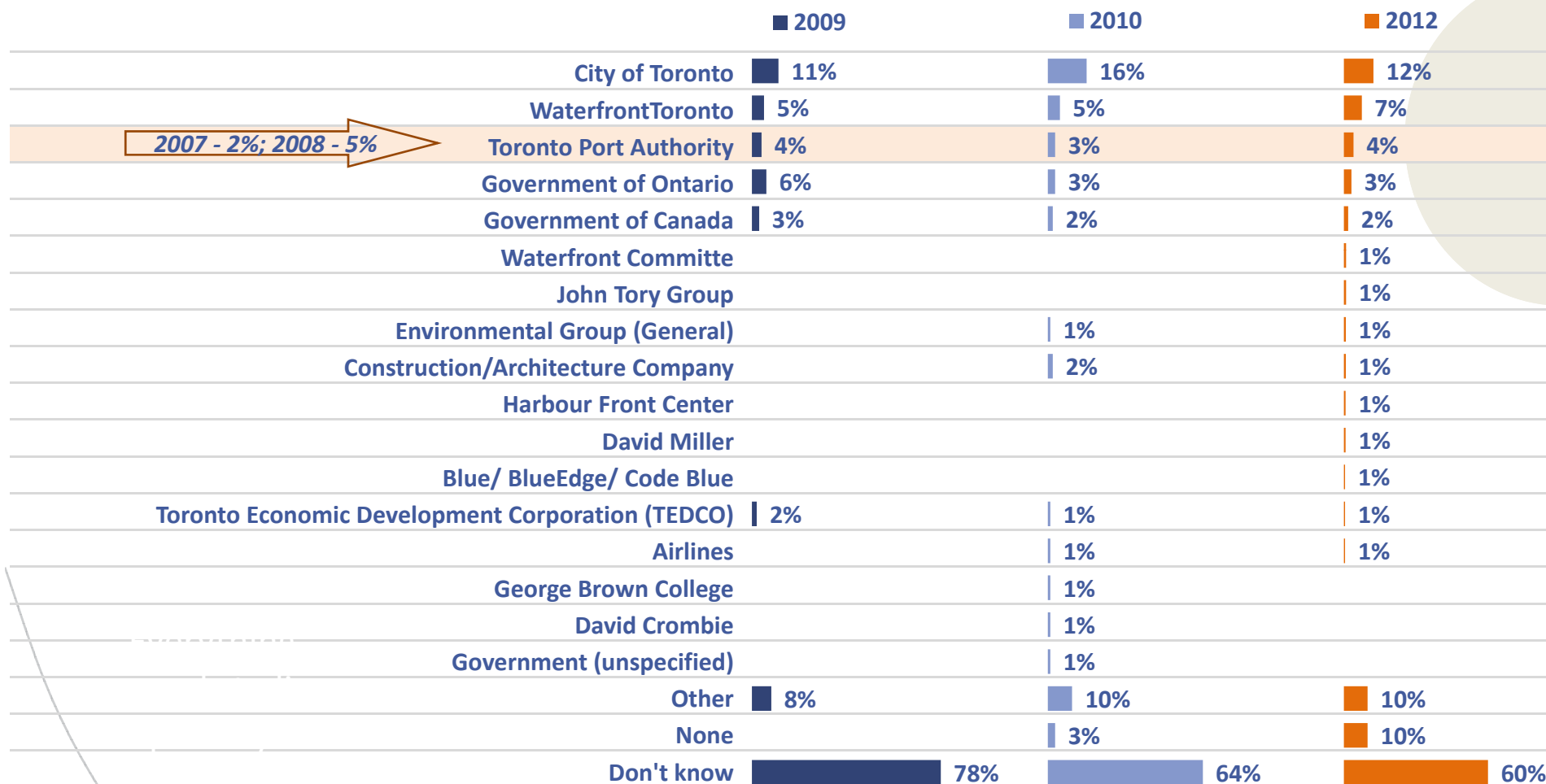
Q: Can you tell me if an improved waterfront could benefit Toronto in the following ways?

Base: All Respondents 2012 n=700



## Unaided Awareness of Waterfront Revitalization Organizations

- The City of Toronto (12%) continues to be identified as most involved in the revitalization of Toronto's waterfront. The Toronto Port Authority ranks among the top. Interestingly, fewer people say they don't know of anybody who is engaged in this activity.



Q: Can you identify any organizations or groups that have been involved in the revitalization of Toronto's waterfront?

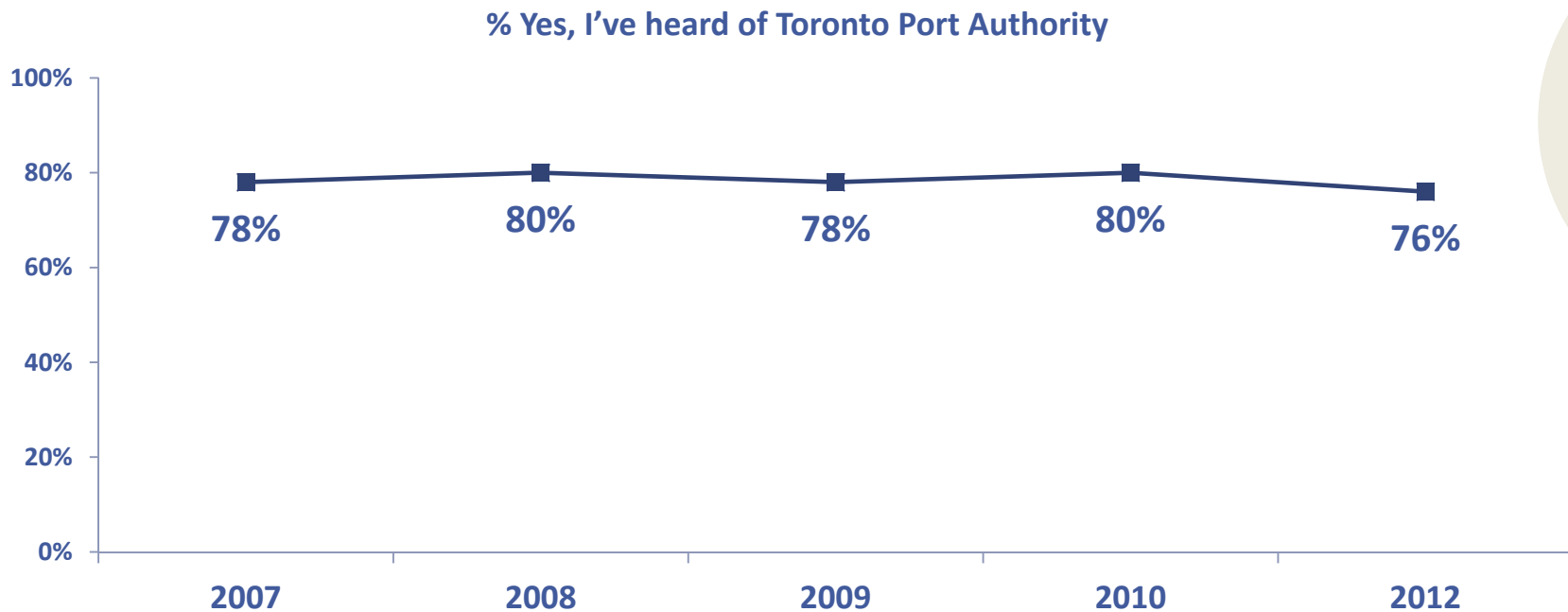
Base: All Respondents 2012 n=700





## Prompted Awareness of TPA

- Aided awareness of the Toronto Port Authority remains quite high, but has not shifted in any significant manner in the last 5 years. Awareness is lowest in the outside boroughs of the city.



	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
Base	700	75	75	75	75	300	100
Yes	76%	85%	71%	69%	71%	83%	86%

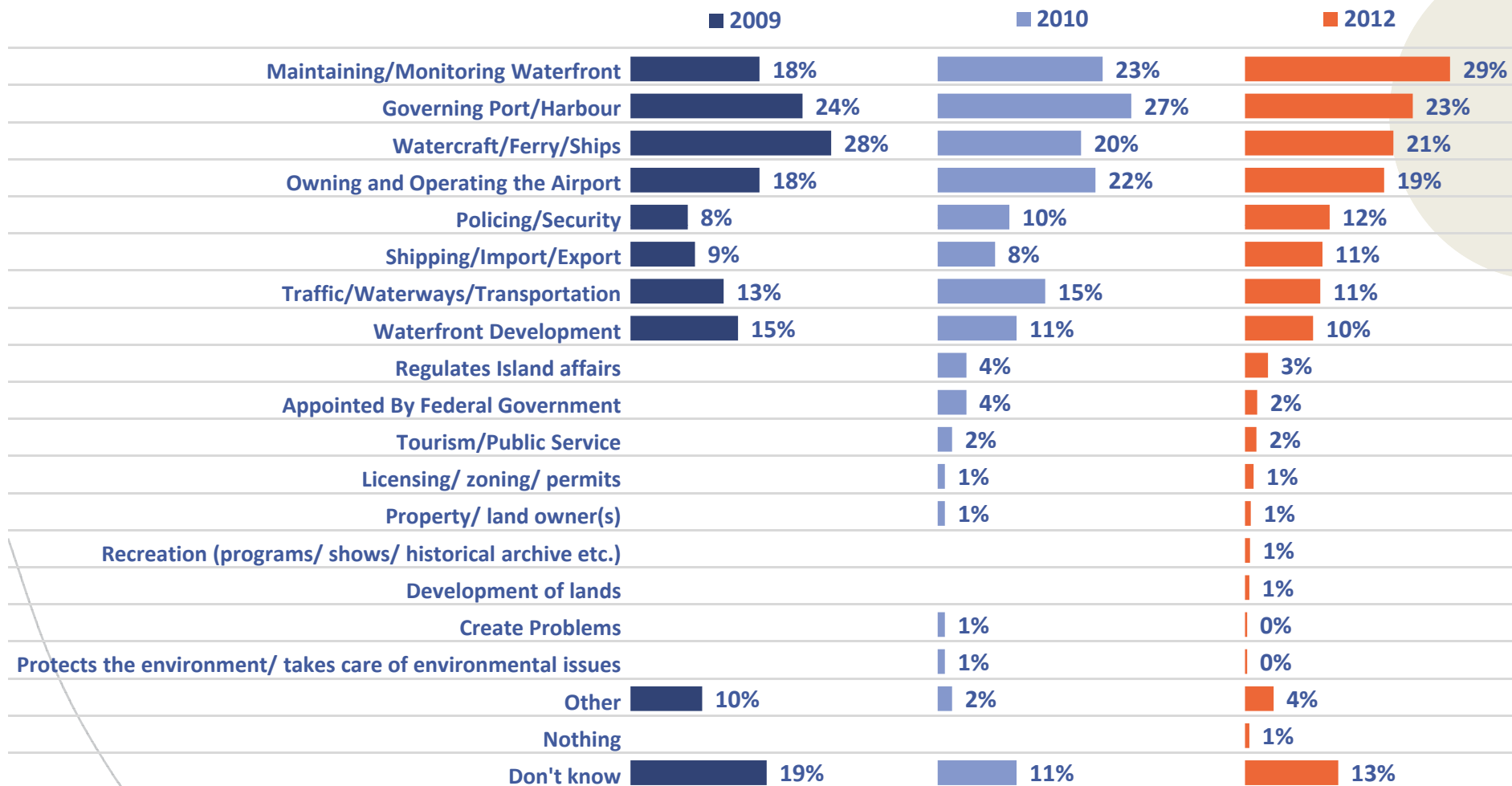
Q: Before today, had you ever heard of the Toronto Port Authority?

Base: All Respondents 2012 n=700



## Perception of TPA's Responsibility

- Quickly rising as the number-one responsibility of the TPA, in the minds of Torontonians, is the maintenance and monitoring of the waterfront. Awareness of most other activities is generally static.



Q: As far as you know, what does the Toronto Port Authority do? What is it responsible for?

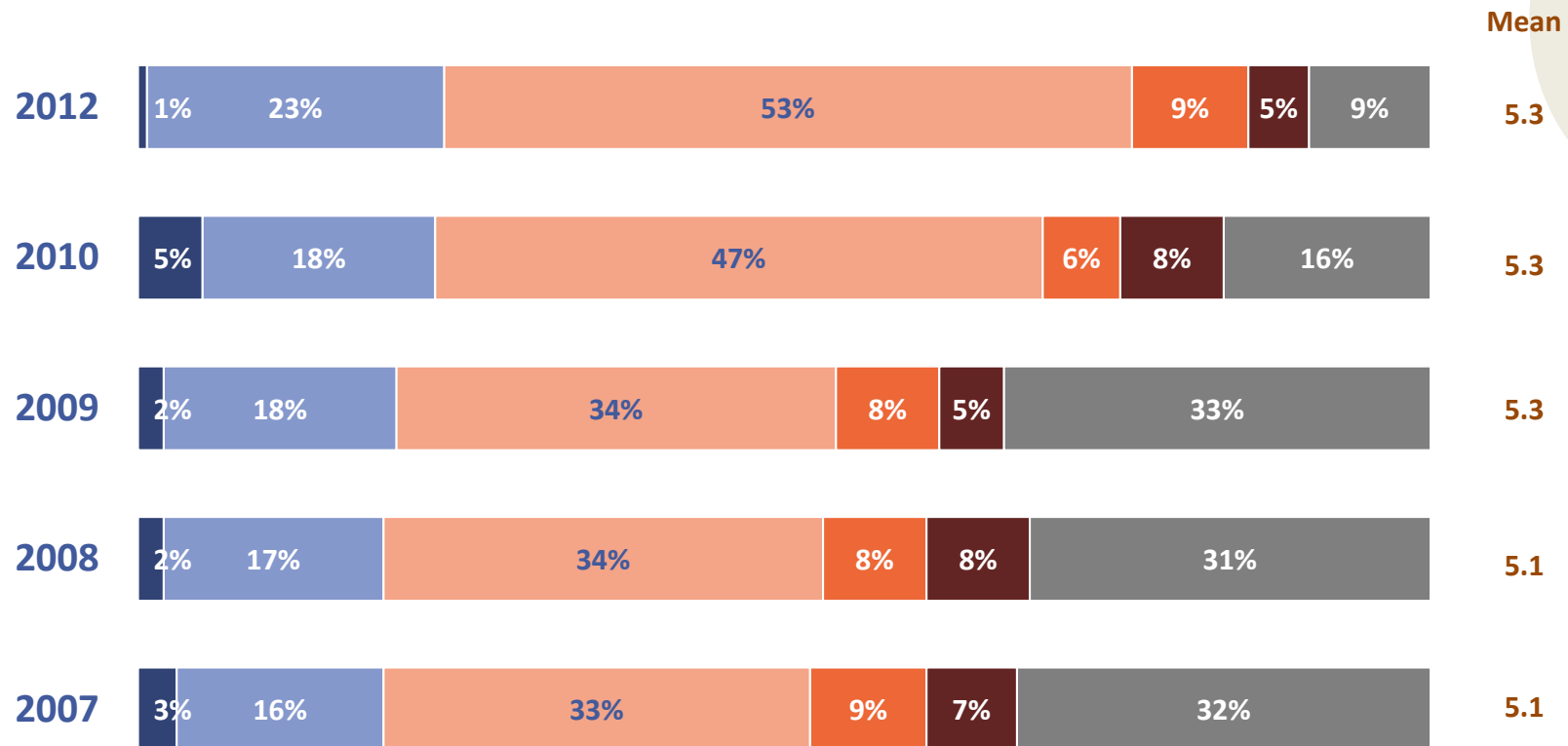
Base: Respondents who heard of Toronto Port Authority 2012n=576



## Impression of the Toronto Port Authority

- Overall favourability of the TPA has stayed consistent in the last three years. However, those who give a favourable rating (24%) greatly outweigh those who give an unfavourable rating (14%).

■ Very favourable (10) ■ Favourable (7-9) ■ Fair (4-6) ■ Unfavourable (2-3) ■ Very unfavourable (1) ■ Don't know / refuse



Q: 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?

Base: Respondents who heard of the Toronto Port Authority 2012 n=576



## Impression of the Toronto Port Authority

- Favourable impressions of the TPA in the south of Queen street neighbourhood has remained consistent over the last year (24%, up 1 point).

	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
<i>Base</i>	700	65	57	55	56	255	88
Very Favourable (10)	1%	-	-	3%	-	2%	-
Favourable (7-9)	4%	19%	29%	30%	21%	22%	15%
Fair (4-6)	9%	53%	48%	52%	56%	53%	59%
Unfavourable (2-3)	14%	6%	7%	6%	11%	8%	14%
Very Unfavourable (1)	5%	7%	-	3%	5%	7%	9%
<i>Mean</i>	5.3	5.1	5.6	5.6	5.2	5.2	4.7

Q: 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?

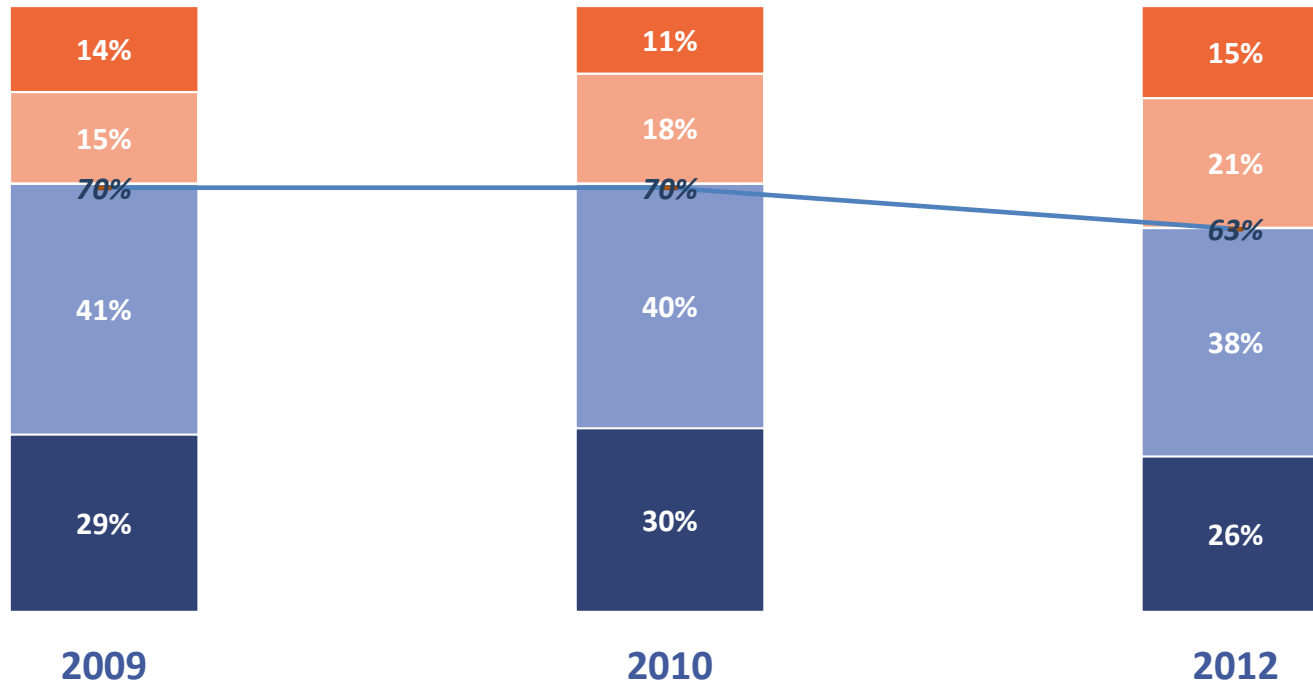
Base: Respondents who heard of the Toronto Port Authority 2012 n=576



## Familiarity with the Billy Bishop Toronto City Airport

- Fewer (63%, down 7 points) Torontonians this year than before say they are at least somewhat familiar with the Billy Bishop Toronto City Airport. \*\* The question changed slightly, as the 2010 survey made mention of “home of Porter airlines”.

Very familiar   Somewhat familiar   Not very familiar   Not at all familiar   Total Familiar



Q How familiar are you with the Billy Bishop Toronto City Airport– located on Toronto Island near Downtown? Are you... ?

Base: All Respondents 2012n=700

## Familiarity with the Billy Bishop Toronto City Airport

- Toronto residents living south of Queen Street (78%) are the most familiar with the BBTCA, although this proportion is down by 4 points. Generally, the further away you live from the airport, the more likely you are to be unfamiliar with it.

	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
<i>Base</i>	700	75	75	75	75	300	100
Very familiar	26%	26%	14%	25%	16%	45%	40%
Somewhat familiar	38%	42%	40%	33%	43%	33%	35%
Not very familiar	21%	21%	25%	28%	19%	13%	15%
Not familiar at all	15%	10%	21%	15%	22%	9%	9%
Total Familiar	63%	68%	55%	58%	59%	78%	76%
Total Unfamiliar	37%	30%	45%	42%	41%	22%	24%

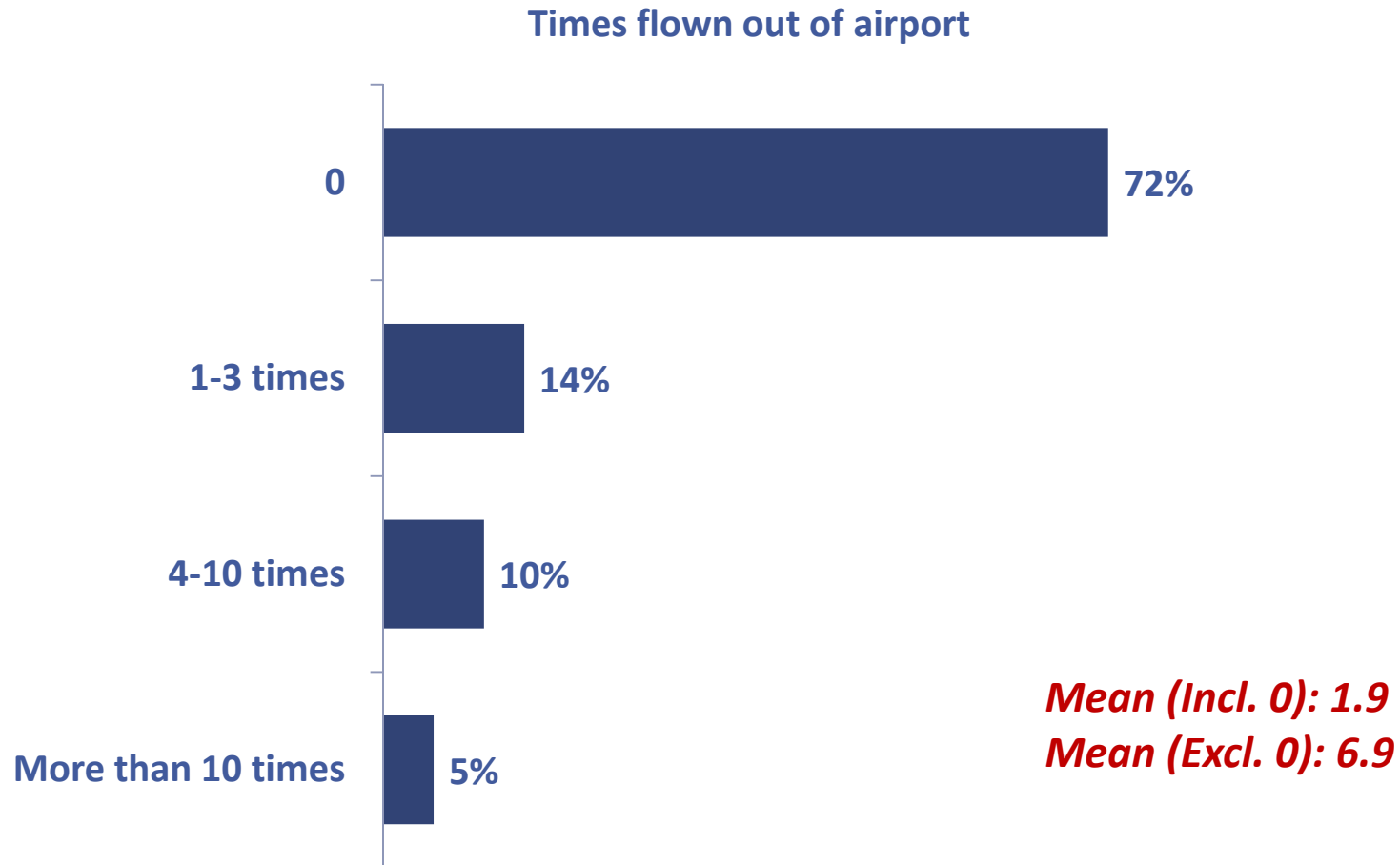
Q: How familiar are you with the Billy Bishop Toronto City Airport– located on Toronto Island near Downtown? Are you... ?

Base: All Respondents 2012n=700



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

- Nearly three in ten (28%) Torontonians say they've flown out of BBTCA. This means that the average Torontonian has used it twice (1.9 times), which includes the 72% who have never used it. Among those who have used the airport, they have used it an average of 7 times (6.9 times).



Q: Approximately how many times have you flown out of Billy Bishop Toronto City Airport on Toronto Island, if at all?

Base: All respondents in 2012, n = 700



## Frequency of BBTCA Use – Region

- Nearly half of all downtown residents (50% north of Queen; 45% south of Queen) have used BBTCA. They are also the most likely to have used it multiple times.

	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
<i>Base</i>	700	75	75	75	75	300	100
0	72%	71%	82%	83%	77%	55%	50%
1-3 times	14%	15%	10%	4%	16%	22%	23%
4-10 times	10%	9%	7%	9%	5%	15%	15%
More than 10 times	5%	5	-	4%	2	8%	12%
Mean use	1.9	2.1	0.6	1.8	1.2	3.7	3.4

Q: Approximately how many times have you flown out of Billy Bishop Toronto City Airport on Toronto Island, if at all?

Base: All respondents in 2012, n = 700

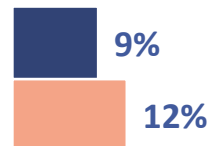




## Attitudes Towards the Airport

- The proportion of people who are dead set against having an airport on the island has decreased slightly (3 points) in the last two years, while those in favour of an island airport has increased (4 points) to two thirds (67%) of all Torontonians.

I'm personally dead set against having an airport on the island and believe it's bad for Toronto



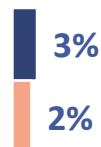
I'm personally in favour of having an airport on the island and believe it's good for Toronto



I really don't care one way or the other about having an airport on the island



Don't Know



■ 2012  
■ 2010

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

Base: All Respondents 2012 n=700



## Attitudes Towards the Airport

- In the South of Queen Street neighbourhood, 71% are in favour of the airport (up 6 points), while only 11% are against it (down 4 points) and 16% don't care either way (down 3 points).

	Total	East York/ York	North York	Scarborough h	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
<i>Base</i>	700	75	75	75	75	300	100
I'm personally dead set against having an airport on the island and believe it's bad for Toronto	9%	15%	6%	2%	19%	11%	10%
I'm personally in favor of having an airport on the island and believe it's good for Toronto	67%	60%	62%	75%	57%	71%	73%
I really don't care one way or the other about having an airport on the island	22%	23%	28%	20%	21%	16%	17%

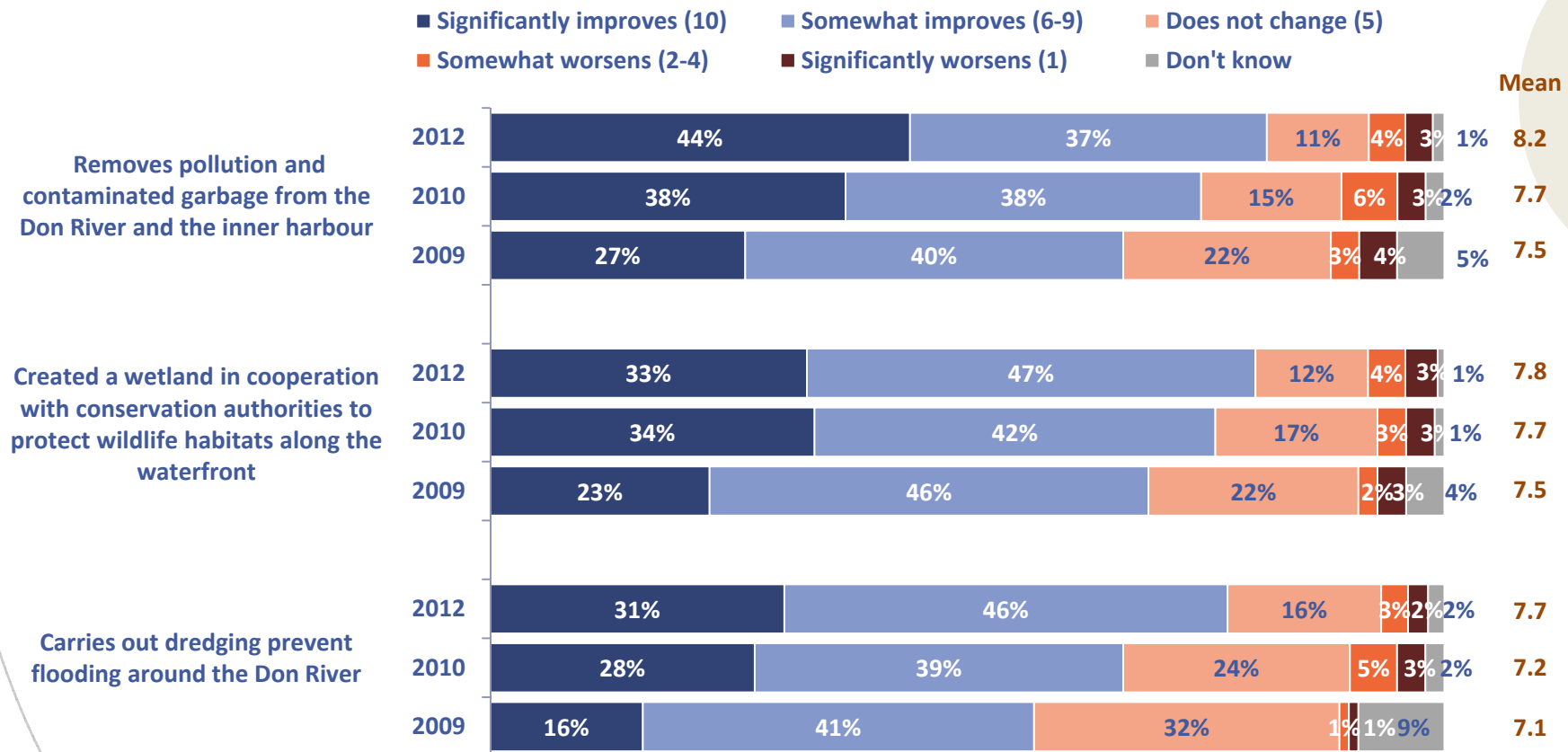
Q: And thinking about the Billy Bishop Toronto City Airport, which of the following would best describe your attitude toward the airport and its operations?

Base: All Respondents 2012 n=700



## Activity Impact on TPA Impression Rating

- Torontonians say that removing pollution from the Don River, creating a wetland in cooperation with conservation authorities and carrying out dredging are most likely to improve their impressions of the TPA.



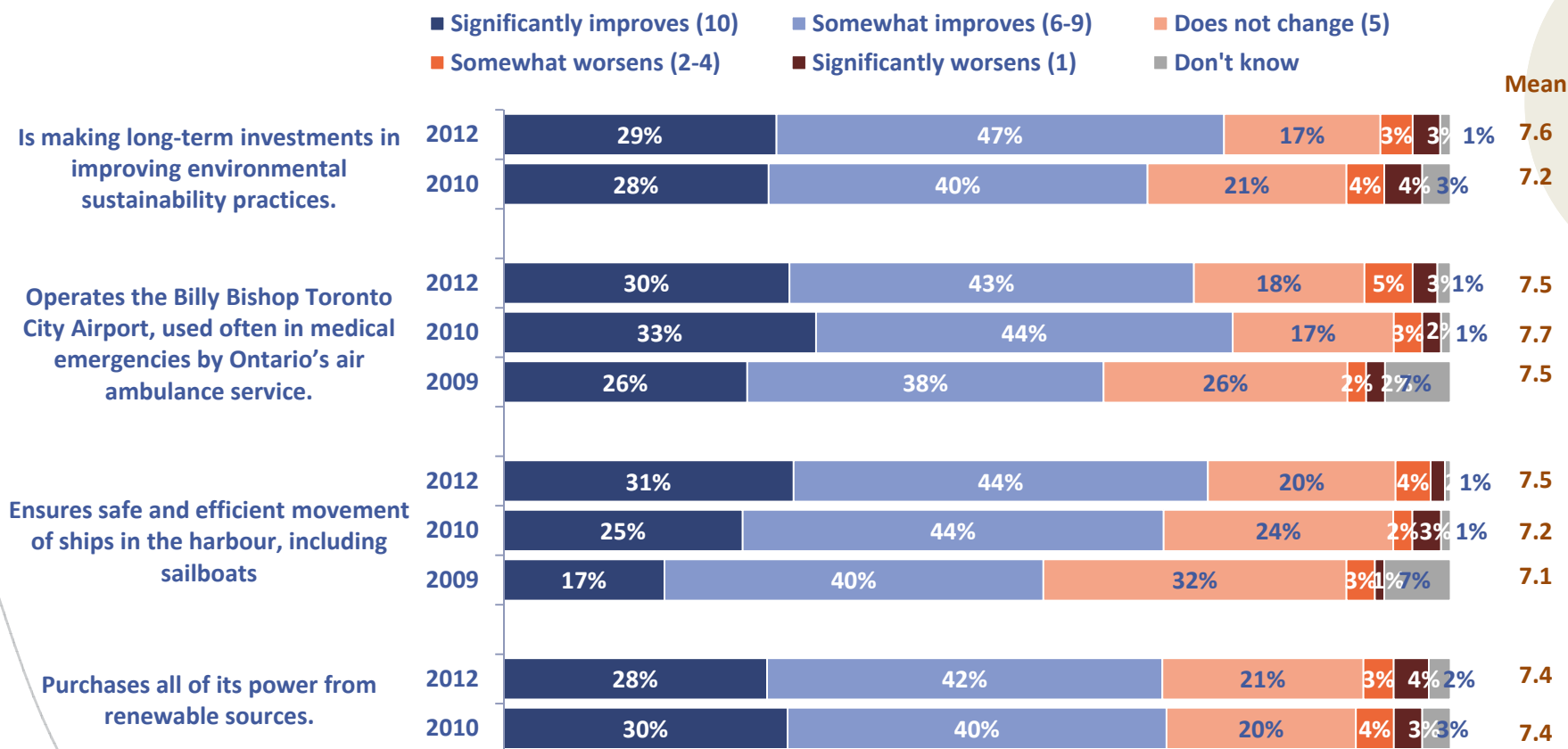
Q: I'd like to read you a list of things that the Toronto Port Authority is responsible for. For each, please tell me whether it (ROTATE: improves or worsens) your impression of the Toronto Port Authority, using a scale from 1 to 10, where 1 means the statement "significantly worsens" your impression 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.

Base: All Respondents 2012 n=700



## Activity Impact on TPA Impression Rating

- Other things that tend to improve Torontonians' impressions of the TPA include making long-term investments in improving environmental sustainability practices, operating BBTCA which is used by Ornge, ensuring safe movement of ships, and purchasing renewable energy.



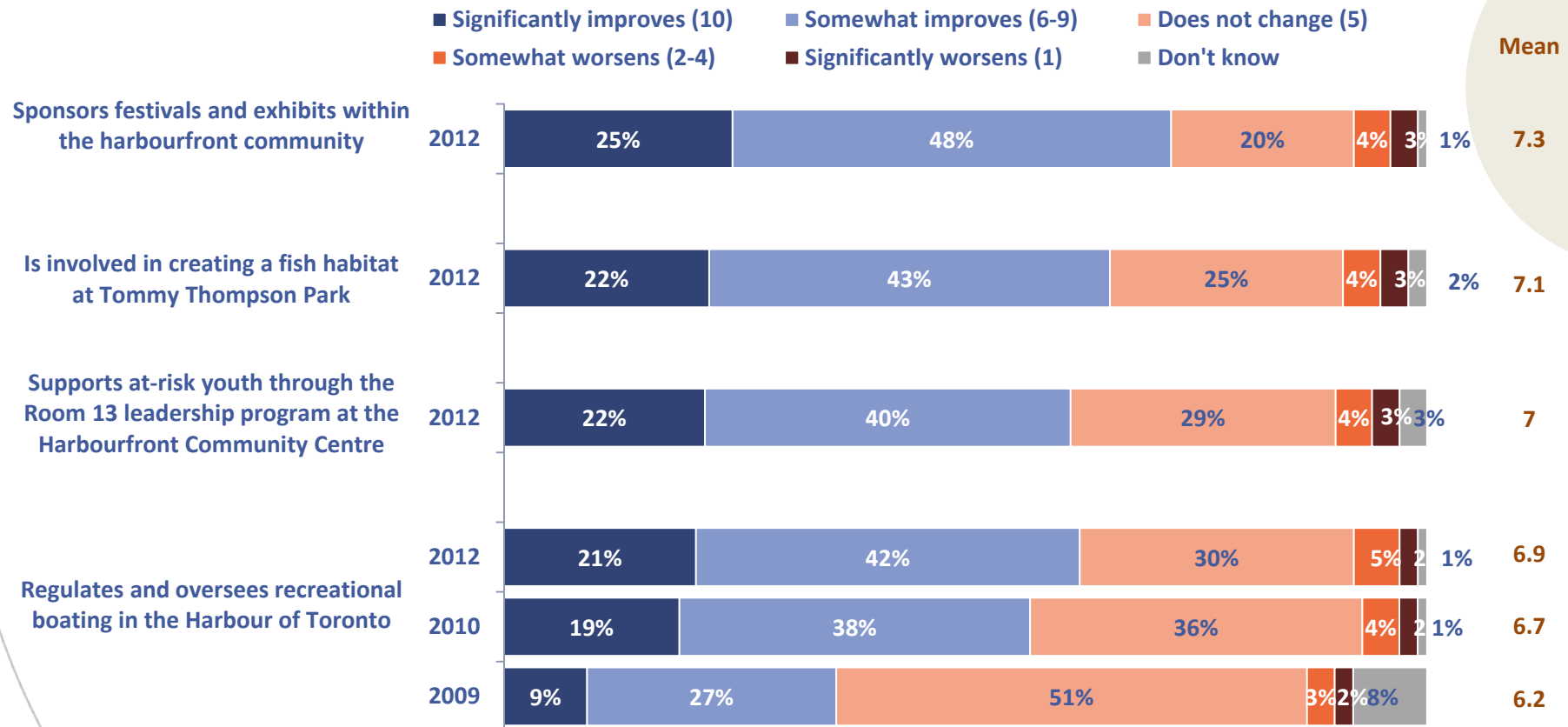
Q: I'd like to read you a list of things that the Toronto Port Authority is responsible for. For each, please tell me whether it (ROTATE: improves or worsens) your impression of the Toronto Port Authority, using a scale from 1 to 10, where 1 means the statement "significantly worsens" your impression 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.

Base: All Respondents 2012 n=700



## Activity Impact on TPA Impression Rating

- While less so, Torontonians are still moved favourably when hearing that the TPA sponsors festivals, is creating a fish habitat, supports at-risk youth, and regulates recreational boating.



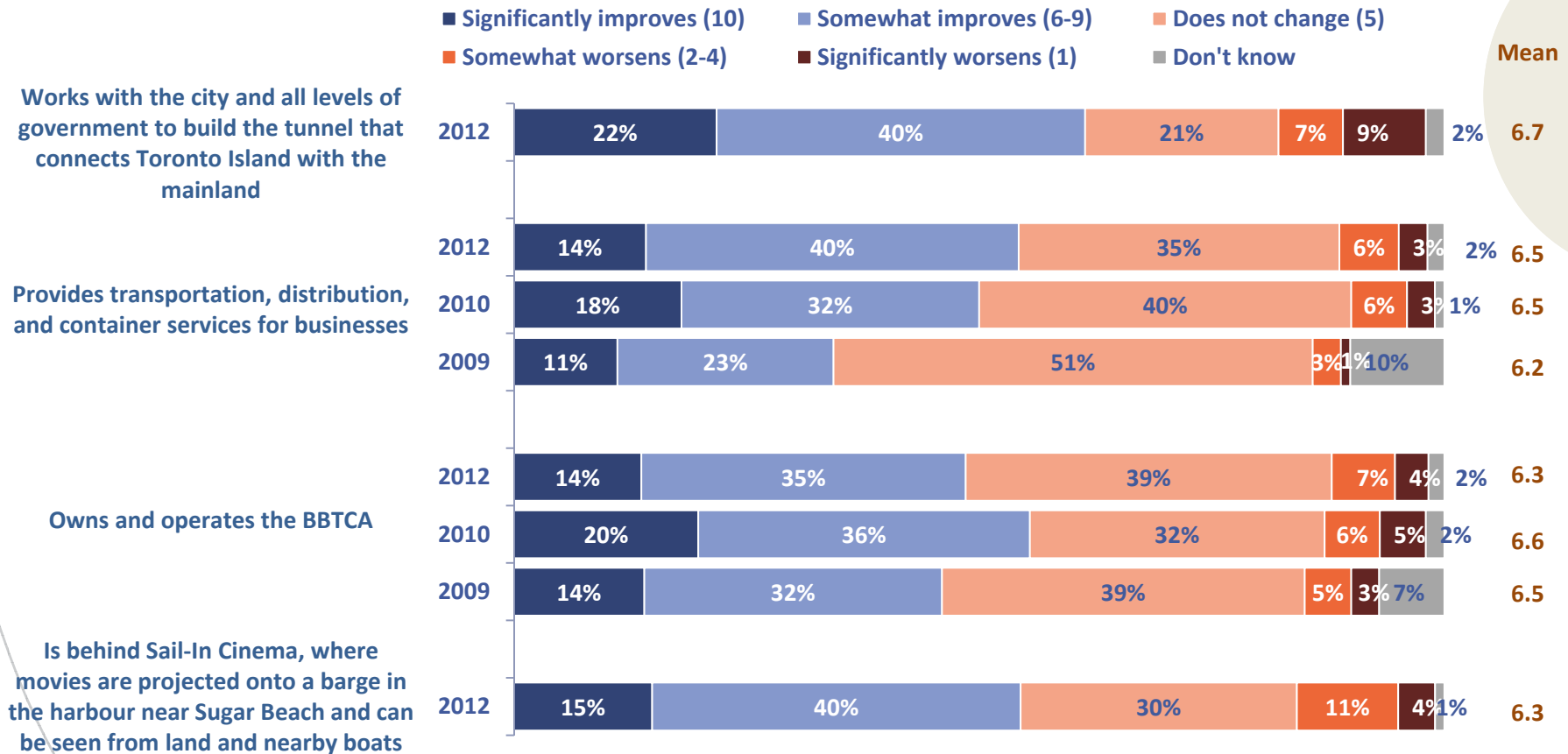
Q: I'd like to read you a list of things that the Toronto Port Authority is responsible for. For each, please tell me whether it (ROTATE: improves or worsens) your impression of the Toronto Port Authority, using a scale from 1 to 10, where 1 means the statement "significantly worsens" your impression 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.

Base: All Respondents 2012 n=700



## Activity Impact on TPA Impression Rating

- While still improving, Torontonians are less moved by the TPA working with all levels of government to build the tunnel, the TPA providing transportation, distribution, and container services for businesses, the TPA owning and operating the BBTCA, and the Sail-In Cinema project.

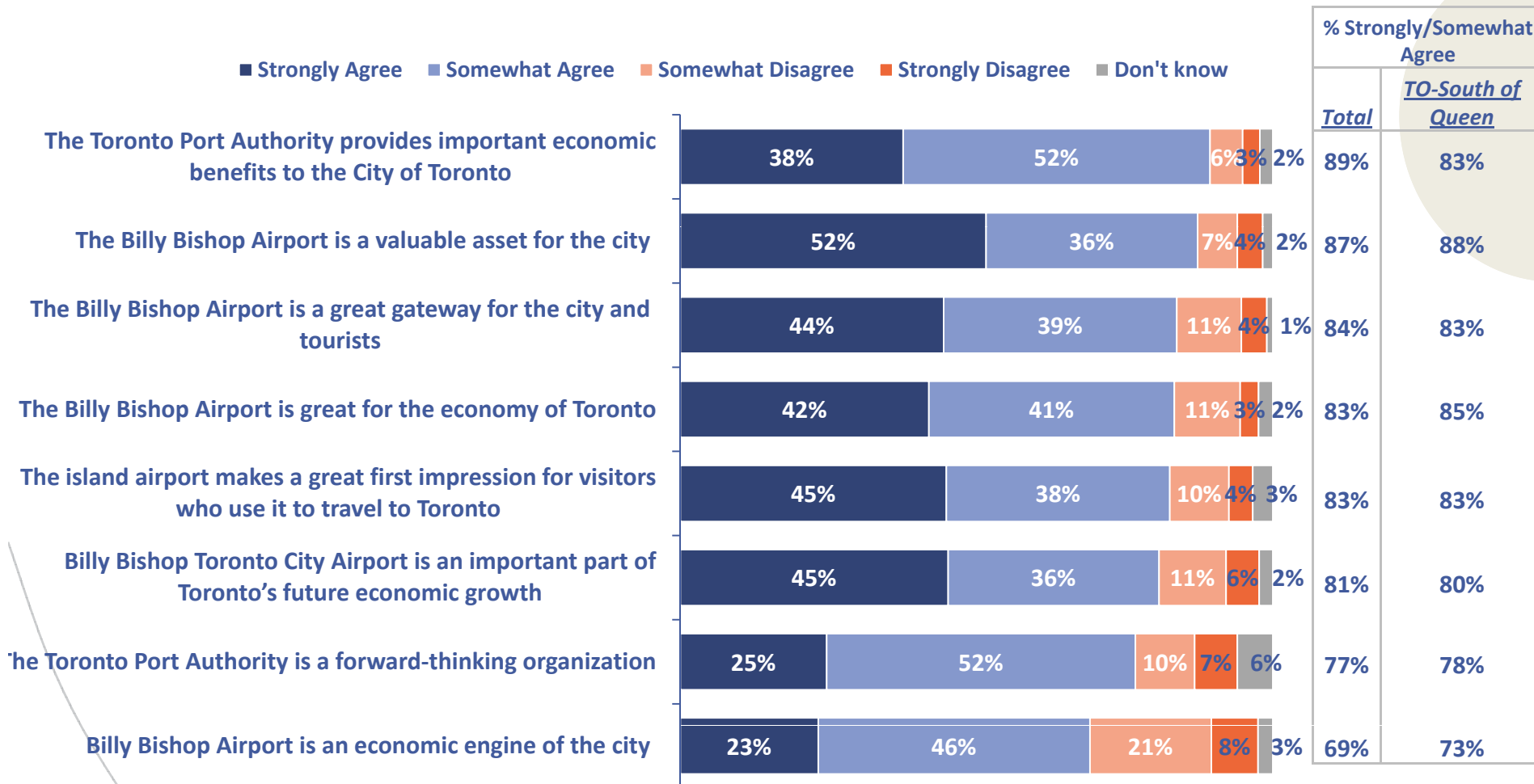


Q: I'd like to read you a list of things that the Toronto Port Authority is responsible for. For each, please tell me whether it (ROTATE: improves or worsens) your impression of the Toronto Port Authority, using a scale from 1 to 10, where 1 means the statement "significantly worsens" your impression 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.



## Thoughts about TPA and Billy Bishop Airport

- Attitudes towards the BBTCA are quite positive, with most believing the it is a valuable asset for the city (87%), is a great gateway (84%), is great for the economy (83%) and is a valuable asset for the city (87%). Two thirds (69%) would even call it an economic engine. Most also believe that the TPA provides important economic benefits to the city (89%), and that they're a forward-thinking organization (77%).



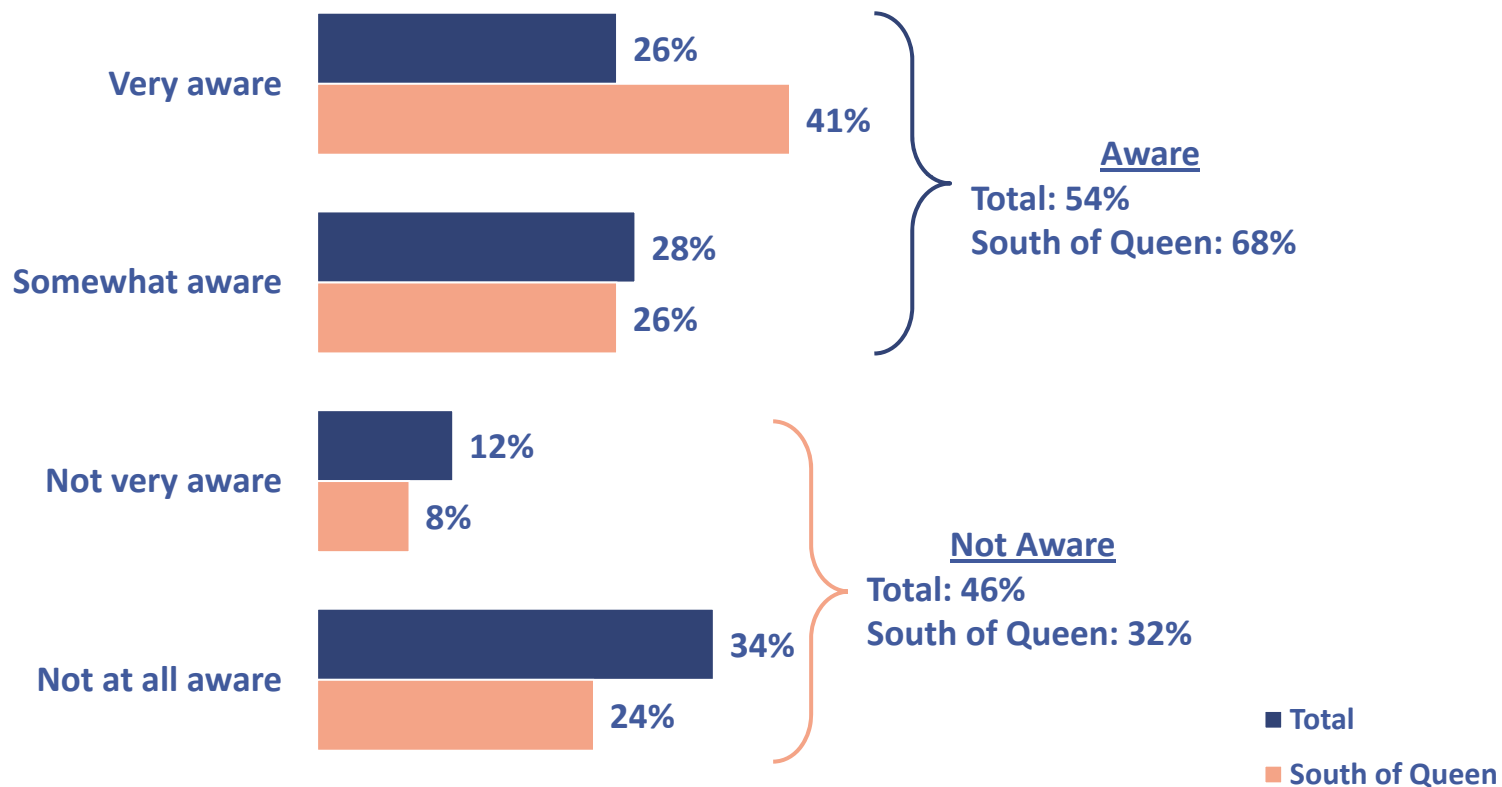
Q: Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements.

Base: All Respondents 2012 n=700



## Awareness of the Construction of an Under-water Pedestrian Tunnel

- Just over half (54%) are 'aware' (26% very/28% somewhat) that an under-water pedestrian tunnel is currently being built to link the island to the mainland. One-third (34%) are not at all aware of this tunnel, while slightly less than half (46%) are 'not aware' (34% not at all/12% not very), overall.



Q: As you may know, access to the Billy Bishop Toronto City Airport is by way of a short ferry ride across a distance of 400 feet (or 121 metres). An under-water pedestrian tunnel is currently being built to link the island to the mainland. Before today, to what extent are you aware of this construction? Are you...?

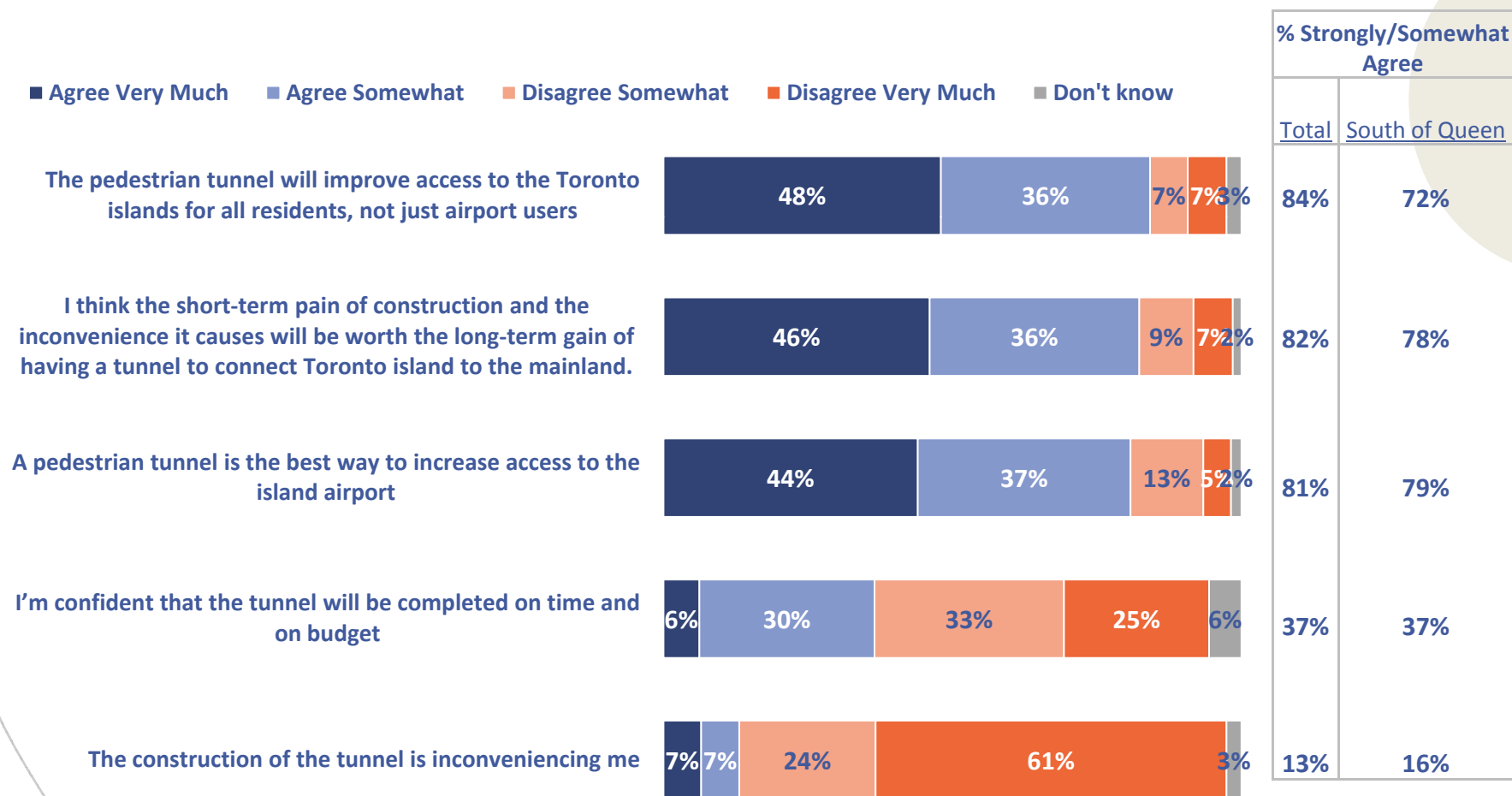
Base: All Respondents 2012 n=700; Respondents from Toronto – South of Queen St. n = 300





## Thoughts about Pedestrian Tunnel

- While 13% of Torontonians agree that the construction of the tunnel is inconveniencing them, most (82%) agree that the short-term pain of construction will be worth the long-term gain. Most also believe that a tunnel is the best way to increase access to the island airport. However, a minority (37%) believes that the tunnel project will be completed on time and on budget.



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

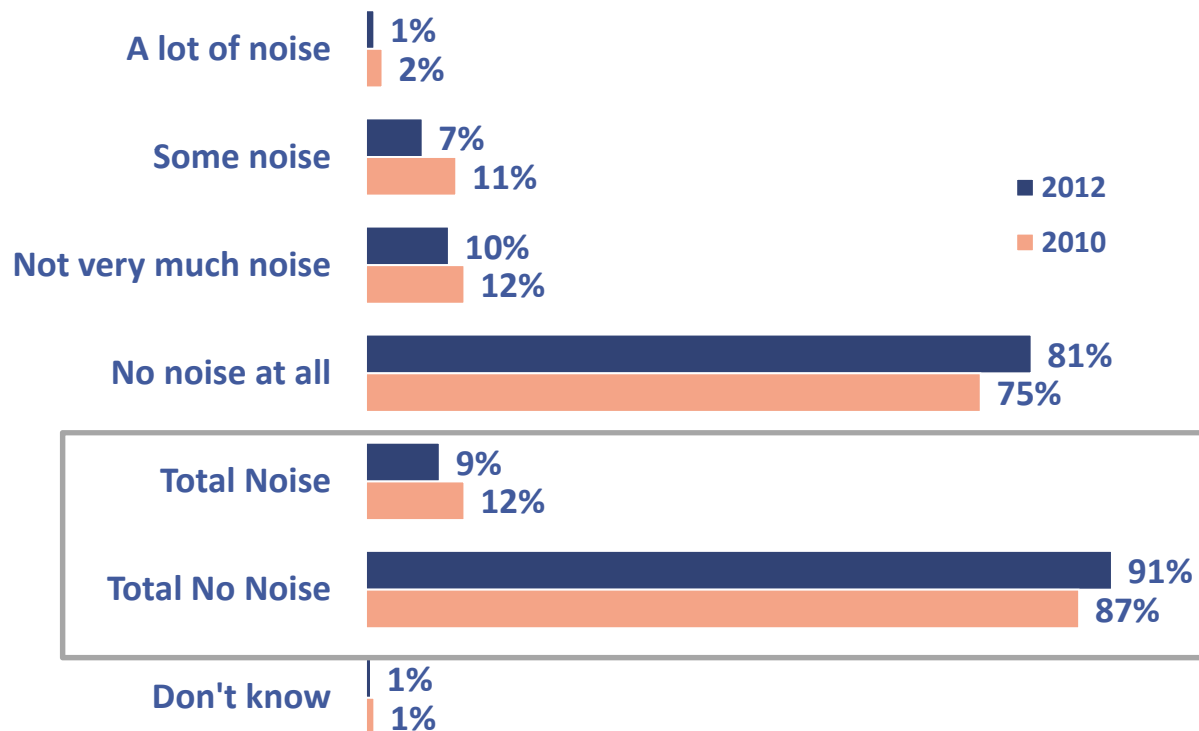
Base: All Respondents 2012 n=700, All Respondents living in Toronto – South of Queen St. n = 300



## Noise Issues Associated with the Airplanes

- Nine in ten (91%) say they hear 'no noise' (81% no noise at all/10% not very much noise). 9% of Torontonians, overall, hear noise associated with BBTCA, down 3 points.

### Noise impacts from home



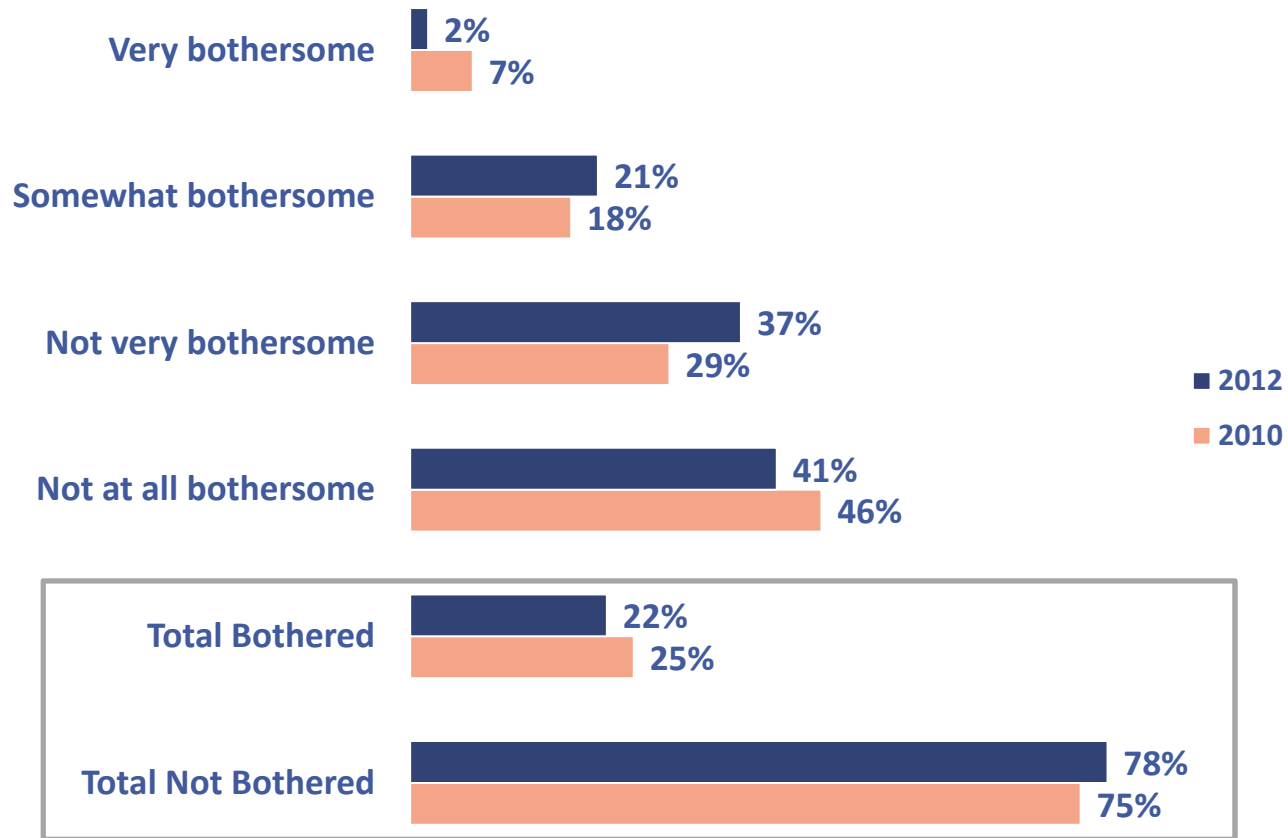
Q: From your home, do you hear any sound or noise associated with the airplanes that land at, and take off from, the Billy Bishop Toronto City Airport?

Base: All Respondents 2012 n=700



## Bothered by Noise

- Among those that hear at least a little noise, 22% are bothered by the noise – down 3 points from last year.



Q: And, overall, would you say that this sound or noise is very bothersome, somewhat bothersome, not really bothersome or not bothersome at all?

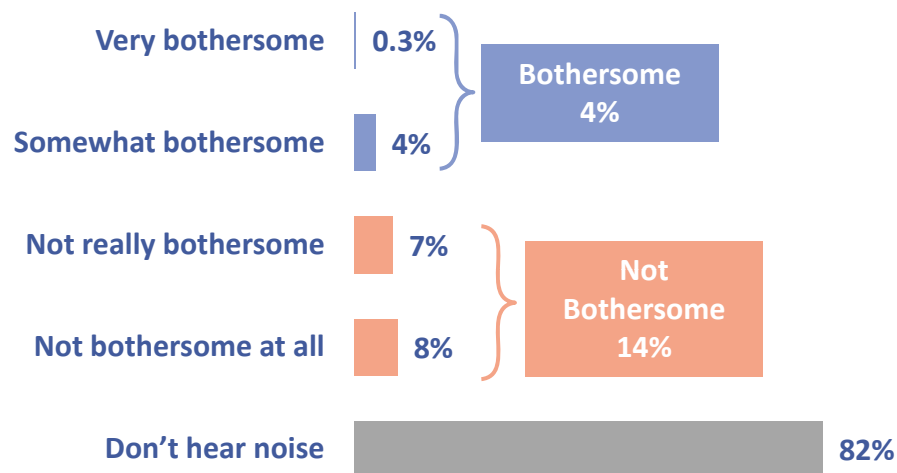
Base: All Respondents who 'hear noise' from Q18: n = 197



## Hear Noise and are Bothered

- In total, only 4% of Torontonians 'hear noise' and are 'bothered' by it. In the South of Queen neighbourhood, the proportion who hear noise and are bothered by it is 13%.

### Attitudes toward noise



	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
Base	700	75	75	75	75	300	100
Very bothersome	-	-	-	-	-	5%	-
Somewhat bothersome	4%	3%	4%	1%	5%	8%	5%
Total Bothersome	4%	3%	4%	1%	5%	13%	5%

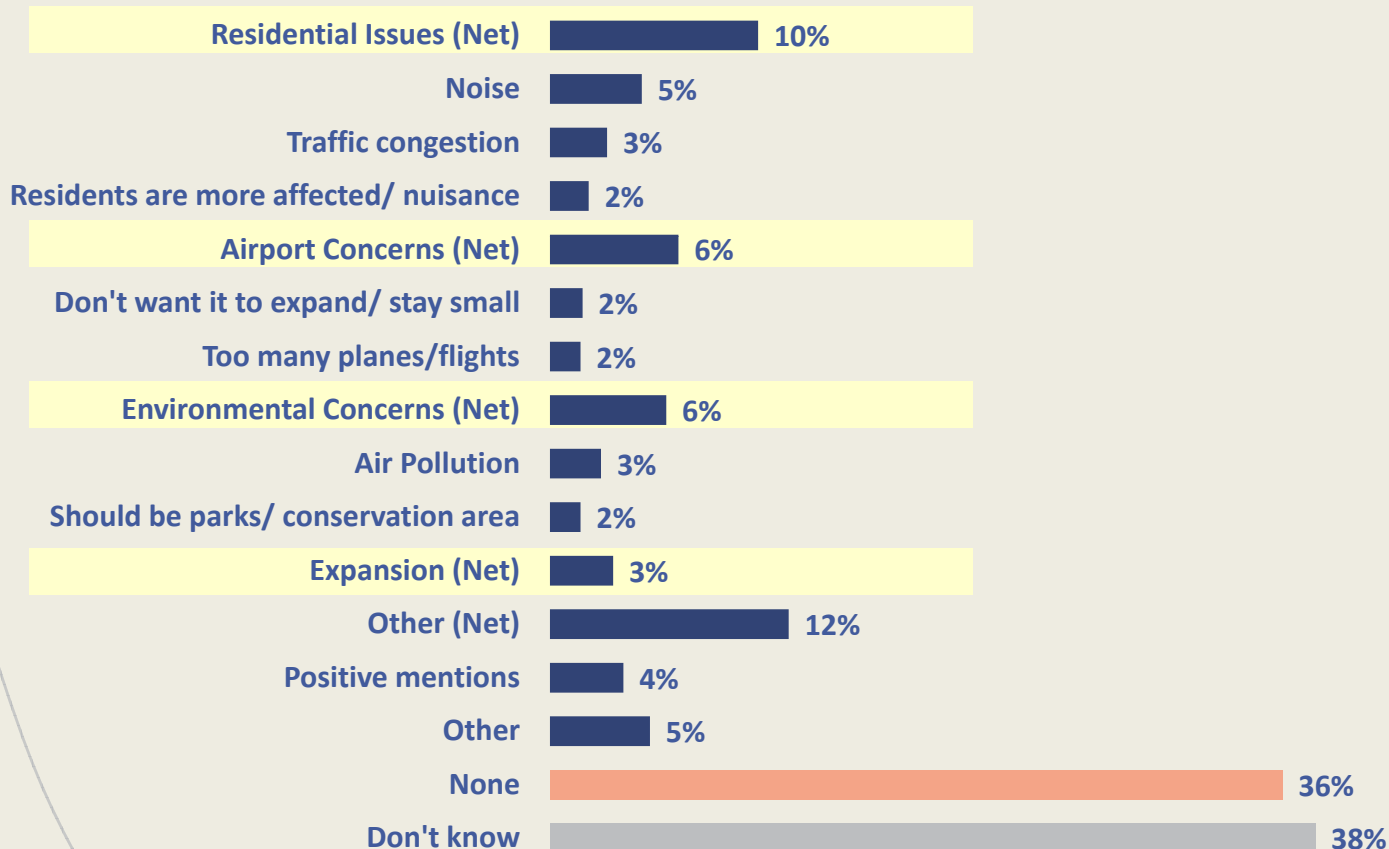
Q: And, overall, would you say that this sound or noise is very bothersome, somewhat bothersome, not really bothersome or not bothersome at all?

Base: All Respondents n=700



## Concerns about the Impacts of the Billy Bishop Toronto City Airport

- Four in ten (36%) say they have no concerns about the impact of the Billy Bishop Airport. Of those that do, a full one in ten (10%) had a residential issue (relating to noise, traffic congestion, etc.). Another one in ten had general airport concerns relating to expansion or too many flights (6%) or concerns regarding environmental impact (6%).



*Mentions smaller than 2% are not shown.*

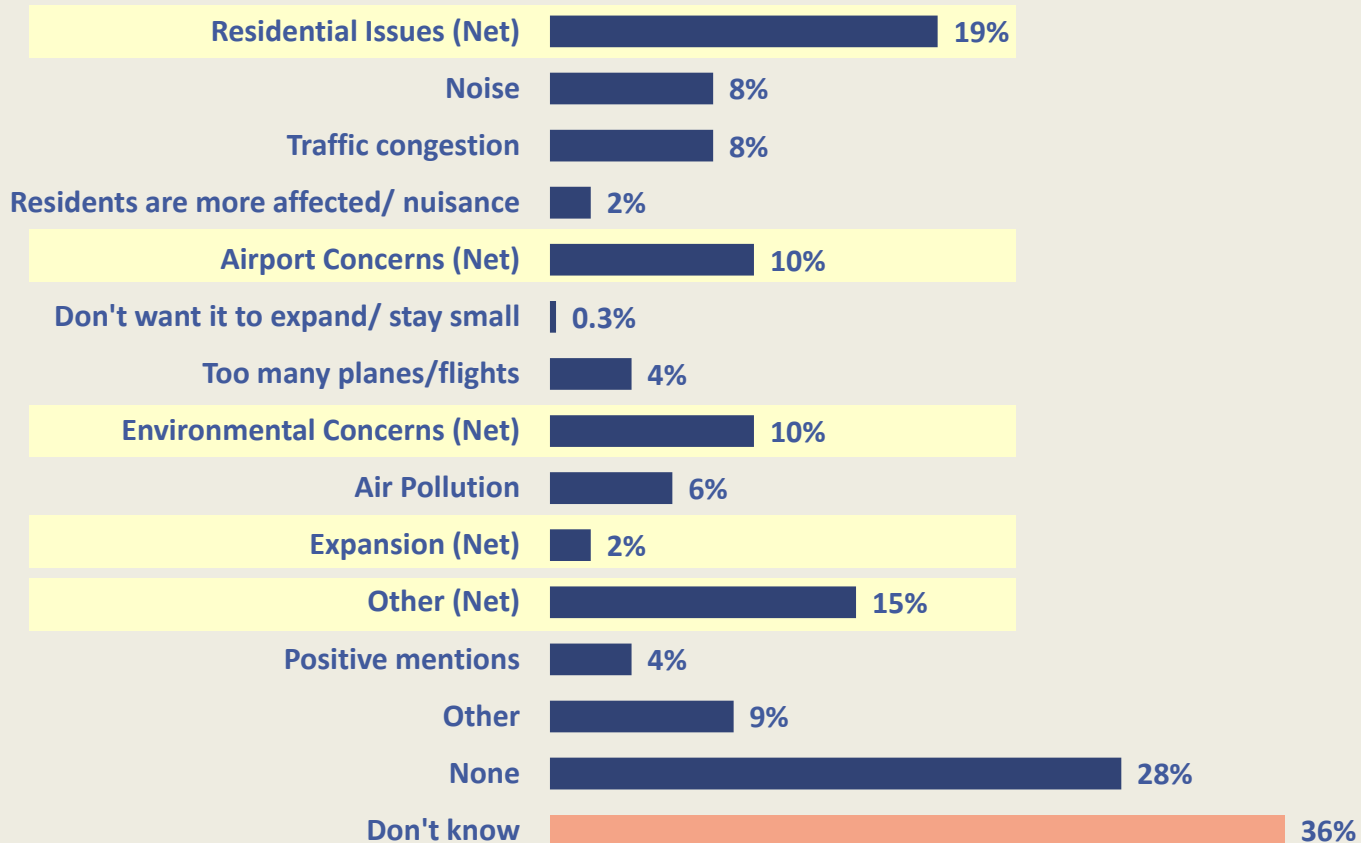
Q: Lastly, please tell me if there are any issues or concerns that you have personally about the operation or impact of the Billy Bishop Toronto City Airport?

Base: All Respondents 2012n=700



## Concerns about BBTCA – South of Queen

- Only 8% in the South of Queen neighbourhood mention 'noise' specifically as a concern they have about the airport, while the same proportion also mention 'traffic congestion'. Three in ten (28%) in the South of Queen area say they have no concerns whatsoever about the BBTCA



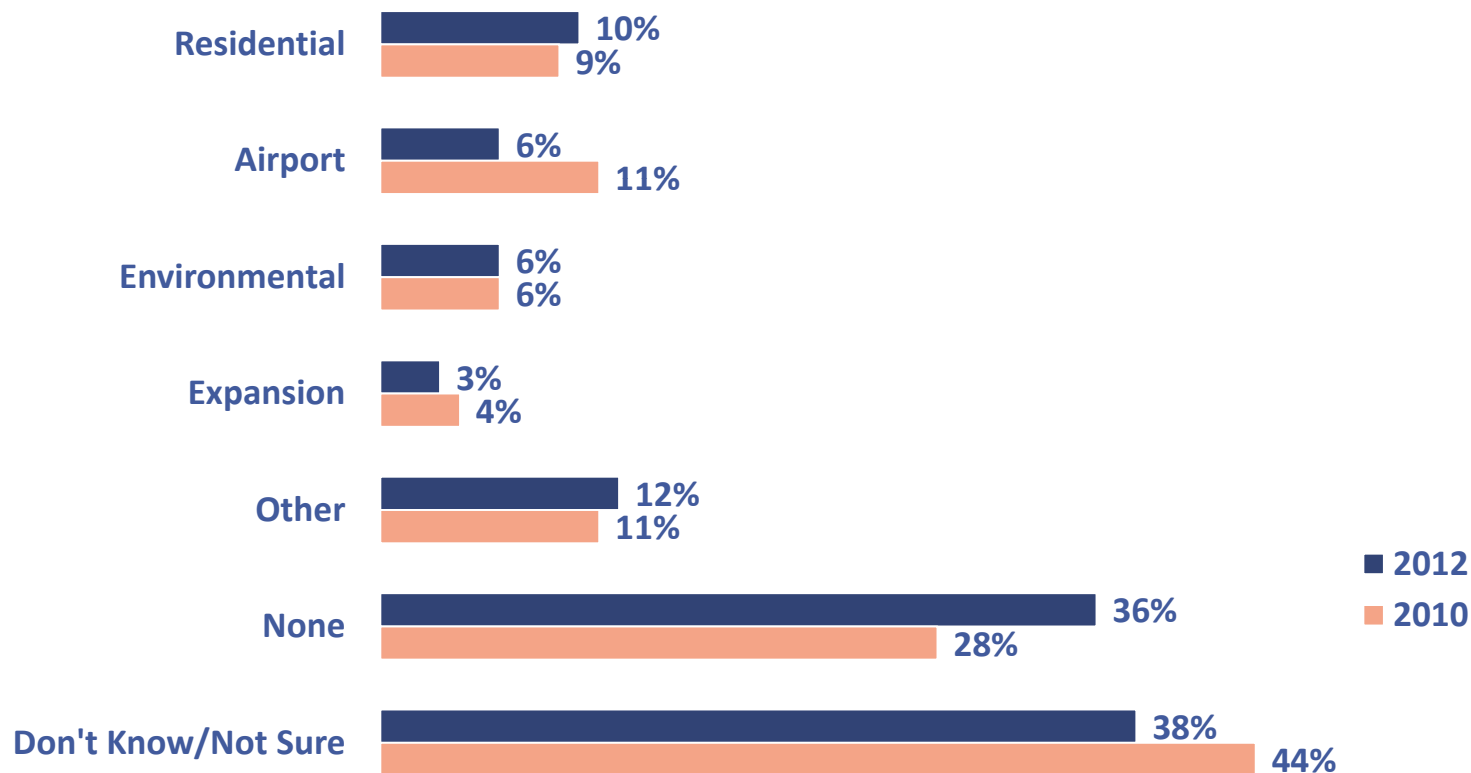
Q: Lastly, please tell me if there are any issues or concerns that you have personally about the operation or impact of the Billy Bishop Toronto City Airport?

Base: All Respondents 2012n=700



## Concern Tracking

• More people in 2012 (+8 pts) say that they have no concerns or issues about the BBTCA compared to 2010. Most other concerns have remained consistent over the last two years, although there are less general airport concerns (-5 pts.) in 2012 compared to 2010.



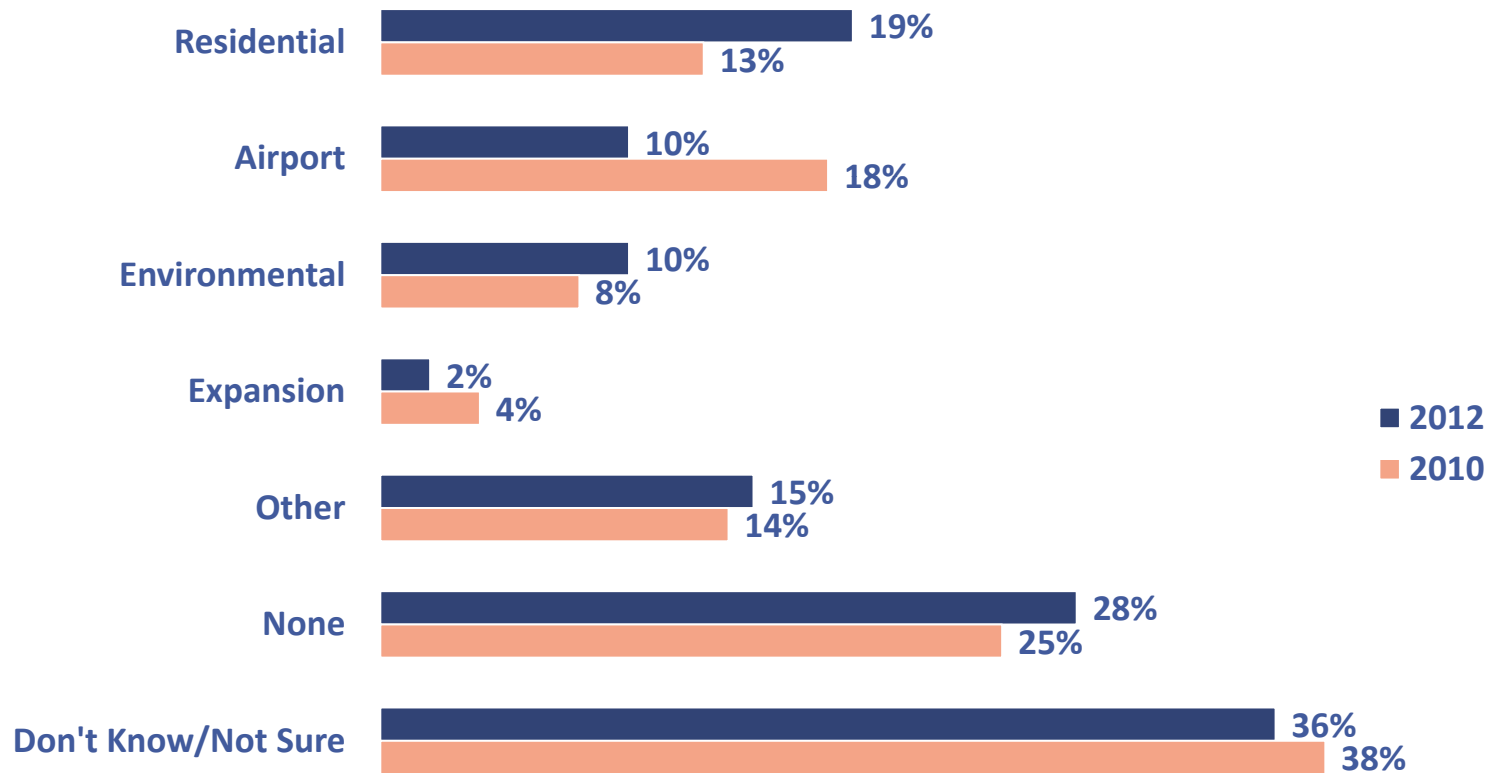
Q: Lastly, please tell me if there are any issues or concerns that you have personally about the operation or impact of the Billy Bishop Toronto City Airport?

Base: All Respondents 2010/2012n=700



## Concern Tracking – South of Queen

- While residential concerns rose from 2010 to 2012 (+6 pts), concerns about the airport dropped (-8 pts.) to 10%.



Q: 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 2010/2012n=700



# Demographics



## Weighted Demographics

### Education

Elementary school	1%
High school	17%
Community college	19%
University	36%
Post-graduate/Professional	27%

### Household Income

Under \$30,000	8%
\$30,000 to just under \$60,000	23%
\$60,000 to just under \$100,000	26%
\$100,000 or more	31%

### Gender

Male	48%
Female	52%

### Generation

Male 18 To 34	16%
Male 35 To 54	18%
Male 55+	14%
Female 18 To 34	14%
Female 35 To 54	21%
Female 55+	17%

### Regions of Residents

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



## Contacts

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