



2013 Public Opinion Survey

Toronto Port Authority Tracking Study

Toronto
Port
Authority

Administration Portuaire de Toronto





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 29 to August 9, 2013.
- For the survey, a representative randomly-selected sample of adult Canadians living in Toronto was interviewed by telephone, including cell-phone sample dialing. 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:
 - \Rightarrow Scarborough n = 75
 - \Rightarrow Etobicoke n = 76
 - \Rightarrow York/East York n = 75
 - \Rightarrow North York n = 75
 - \Rightarrow Old Toronto North of Queen n = 100
 - \Rightarrow 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 Toronto 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 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 2012.



Detailed Findings

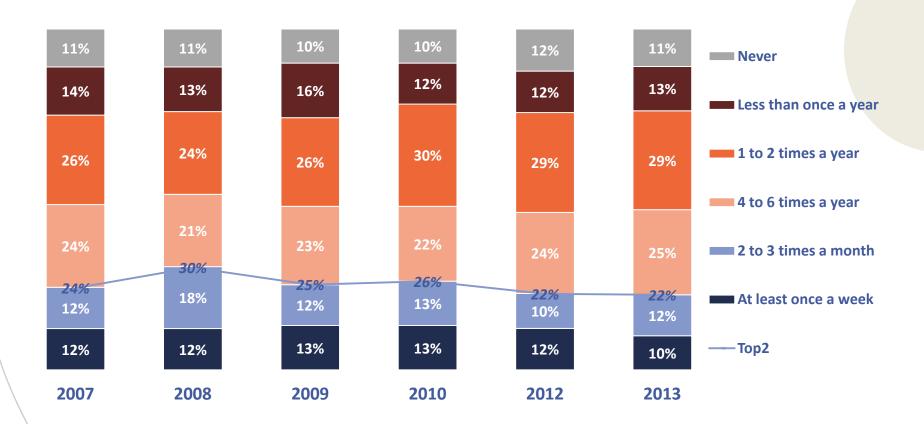


Q2:

Base:

Frequency of Visiting the Waterfront Area in Toronto

■ The proportion of Torontonians who regularly visit the waterfront has held study since last year.



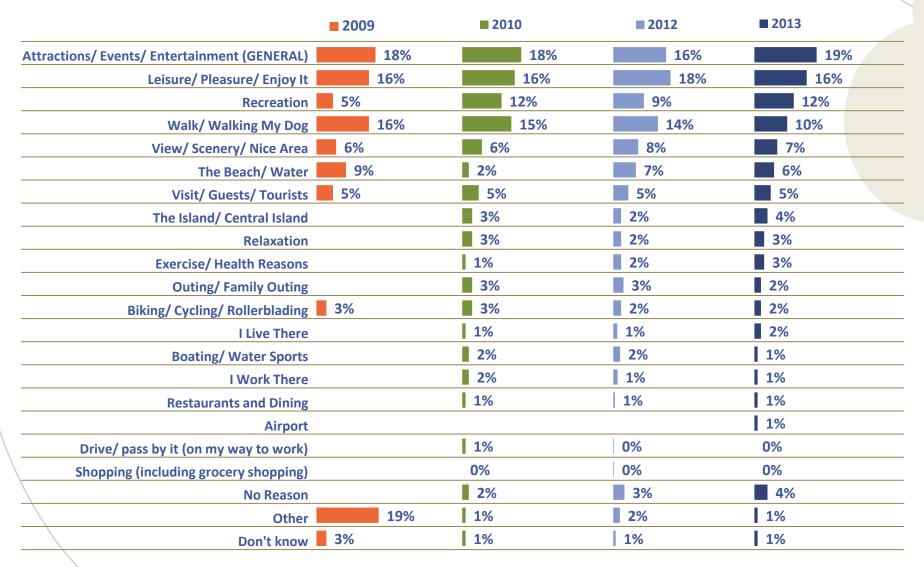


Q3:

Base:

Reasons for Visiting the Waterfront Area in Toronto

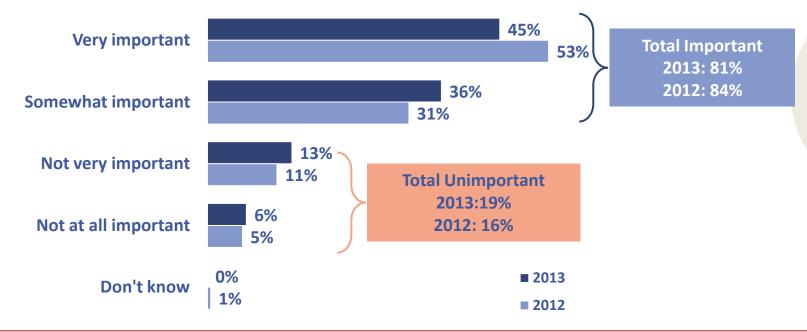
 Attractions, specifically, are the number one reason that Torontonians visit the waterfront, followed by leisure and recreation. It's not just a nice place to walk a dog!





Importance of Improving Toronto's Waterfront

 Most Torontonians continue to believe that improving the waterfront is very important (81%), with those South of Queen Street (90%) most emphatic.



	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
Base	(n=701)	(n=75)	(n=75)	(n=75)	(n=76)	(n=300)	(n=100)
Very Important	45%	48%	43%	37%	40%	63%	56%
Somewhat Important	36%	35%	35%	43%	38%	27%	31%
Total Important	81%	83%	78%	79%	77%	90%	86%

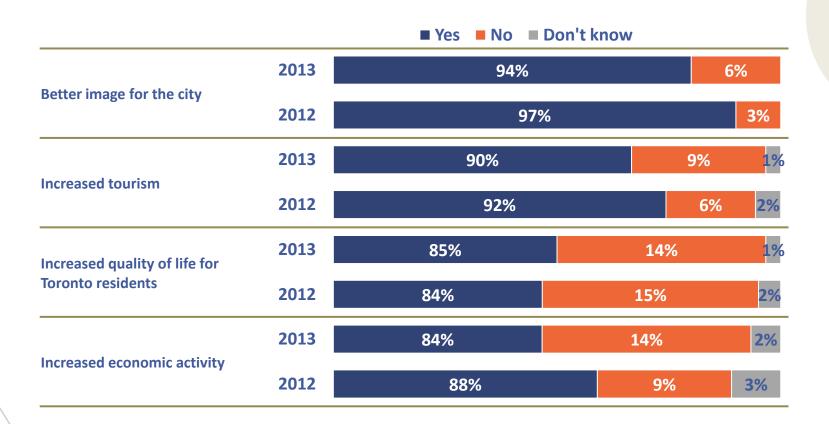


Q5:

Base:

Benefits of an Improved Waterfront

• Torontonians believe that an improved waterfront would help the city achieve a better image (94%), increase tourism (90%), lead to an increased quality of life for residents (85%) and lead to increased economic activity (84%).





Unaided Awareness of Waterfront Revitalization Organizations

 Unaided awareness of the Toronto Port Authority as an organization involved in the revitalization of Toronto's waterfront continues to hover around 3 or 4%.

	2009	2010	■ 2012	■ 2013
City of Toronto	11%	16%	12%	10%
Toronto Waterfront Revitalization Corporation/Waterfront Toronto	5%	5%	7%	5%
Government of Ontario	6%	3%	3%	4%
Toronto Port Authority	4%	3%	4%	3%
Government of Canada	3%	2%	2%	2%
Waterfront Committee			1%	1%
Harbour Front Center			1%	1%
Airlines		1%	1%	1%
Politician/ Political groups			0%	1%
Conservation Authority			0%	1%
Pan Am Games			0%	1%
George Brown College		1%		1%
Other	8%	10%	10%	8%
None		3%	10%	7%
Don't know	78%	64%	60%	63%

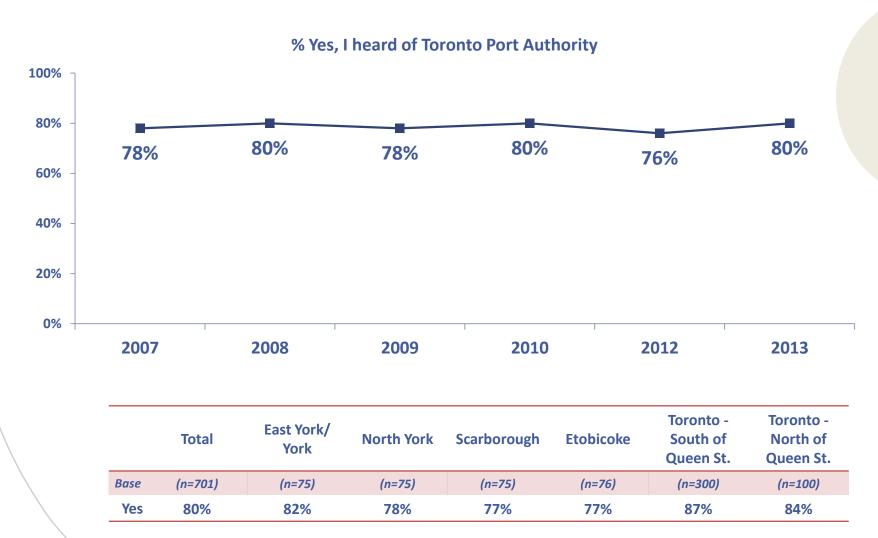
Q7: Can you identify any organizations or groups that have been involved in the revitalization of Toronto's waterfront?

Base: All Respondents 2013 n=701



Prompted Awareness of TPA

 Aided awareness of the Toronto Port Authority fluctuates from 76% to 80%, but awareness rises to 87% South of Queen Street.



Q8: Before today, had you ever heard of the Toronto Port Authority?

Base: All Respondents 2013 n=701

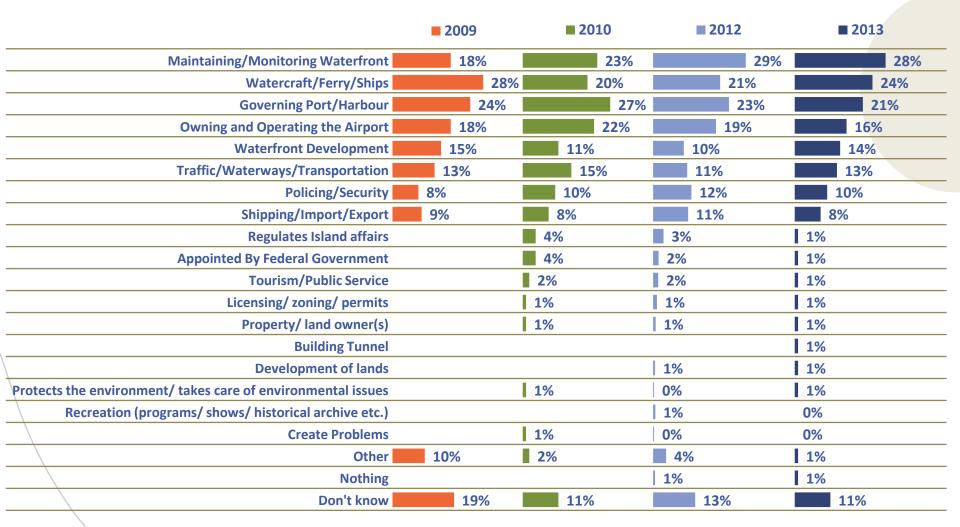


Q9:

Base:

Perception of TPA's Responsibility

By and large, people believe that the TPA is responsible for maintaining/monitoring the waterfront (28%), watercraft/ferry/ships (24%), and governing the port/harbour (21%). Unaided mentions of owning/operating the Airport have actually decreased (16%) over the last three years (down 6 points), while waterfront development has increased (14%), up 4 points since last year.



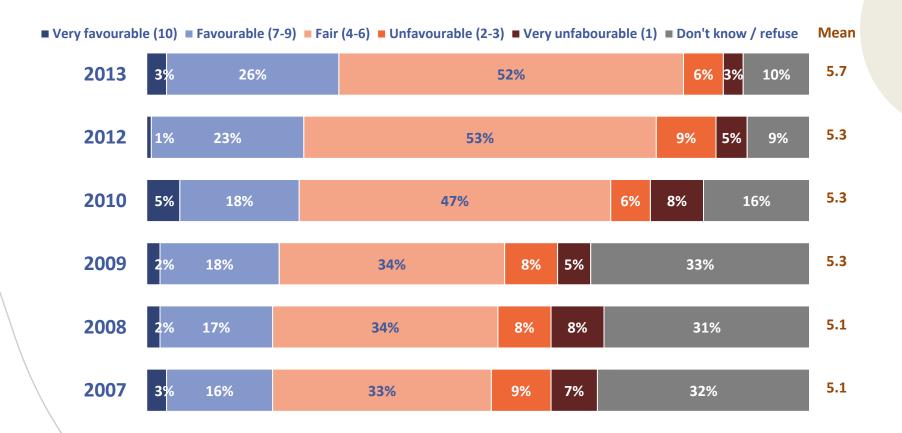


Q10:

Base:

Impression of the Toronto Port Authority

• General impressions of the TPA have risen from 5.1 five years ago to 5.7 this year. Furthermore, 29% give the TPA a rating of 7 or higher in 2013, compared to 19% in 2007. Currently, positive impressions (41%) outweigh negative impressions (12%).





Q10:

Base:

Impression of the Toronto Port Authority

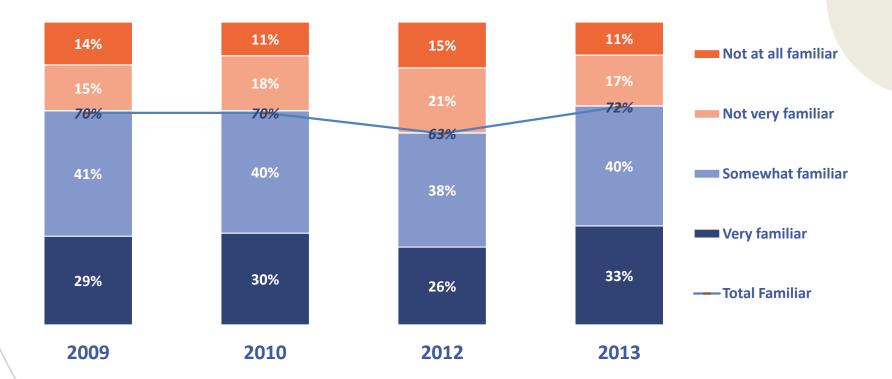
• Opinions of the TPA are slightly less favourable South of Queen Street (5.3) than they are in other regions of the City.

	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
Base	(n=586)	(n=62)	(n=59)	(n=58)	(n=59)	(n=263)	(n=85)
Very Favourable (10)	3%	6%	-	6%	4%	4%	2%
Favourable (7-9)	26%	37%	27%	32%	26%	29%	29%
Fair (4-6)	52%	50%	59%	46%	61%	49%	49%
Unfavourable (2-3)	6%	5%	5%	7%	3%	7%	6%
Very Unfabourable (1)	5%	7%	_	3%	5%	7%	9%
Mean	5.7	6	5.6	5.9	5.9	5.3	5.6



Familiarity with the Billy Bishop Toronto City Airport

• Nearly three quarters (72%) of residents are familiar with Billy Bishop Toronto City Airport.



Q11:



Q11:

Base:

Familiarity with the Billy Bishop Toronto City Airport

• Familiarity with the Airport is highest in the downtown core, both north and south of Queen Street.

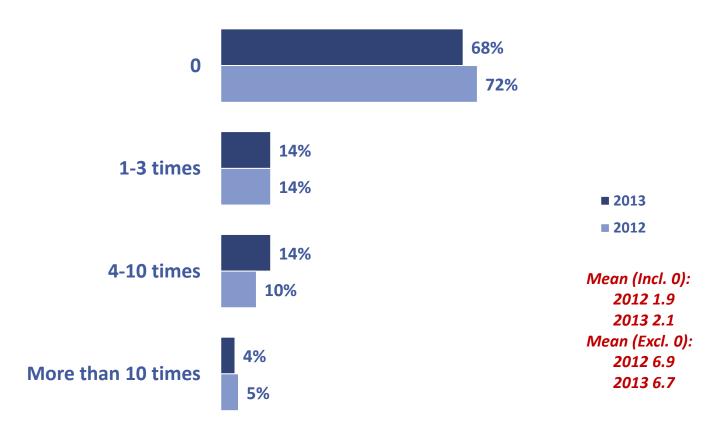
	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
Base	(n=701)	(n=75)	(n=75)	(n=75)	(n=76)	(n=300)	(n=100)
Very familiar	33%	27%	25%	21%	34%	51%	52%
Somewhat familiar	40%	47%	48%	39%	36%	33%	31%
Not very familiar	17%	19%	19%	19%	18%	7 %	14%
Not familiar at all	11%	8%	9%	22%	10%	9%	3%
Total Familiar	72%	73%	73%	60%	70%	84%	83%
Total Unfamiliar	28%	27%	27%	40%	29%	16%	17%



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

• One in three (32%) Torontonians have used the airport, up 4 points. The average Torontonian (including those who haven't used it) has used the airport 2.1 times (up 0.2 points), and those who have used it have used it an average of 6.7 times (down 0.2 points), reflecting that there are new users in the past year who have only used it once or twice.

Times flown out of airport





Frequency of BBTCA Use - Region

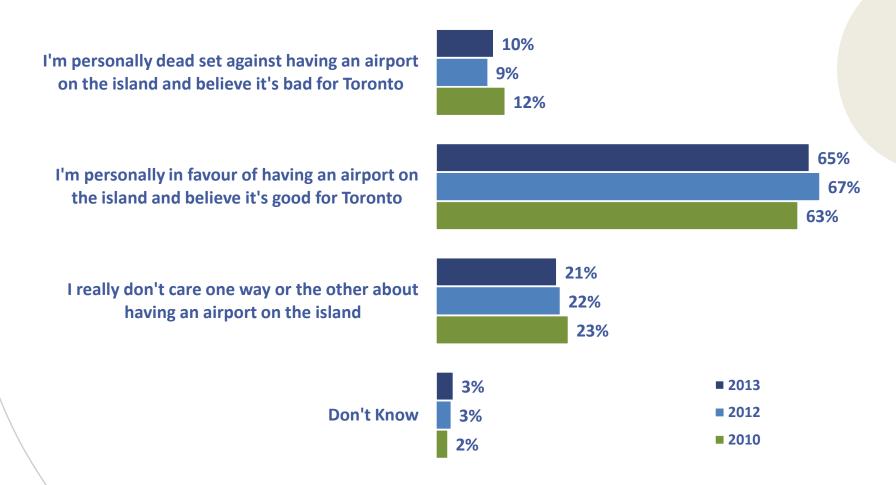
• A majority (54%) of downtown South of Queen residents have used the airport, with nearly half (49%) of those living north of Queen having used the airport as well.

	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
Base	(n=701)	(n=75)	(n=75)	(n=75)	(n=76)	(n=300)	(n=100)
0	68%	76%	80%	75%	71%	51%	46%
1-3 times	14%	15%	11%	16%	12%	21%	15%
4-10 times	14%	7%	8%	8%	14%	20%	29%
More than 10 times	4%	3%	2%	1%	3%	9%	9%
Mean use	2.1	1.3	1.2	0.8	2.2	4	4.5



Attitudes Towards the Airport

• Attitudes towards the airport have been set for the last 3 years. One in ten (10%) are dead set against he airport, while 65% are in favour, and two in ten (21%) don't care either way.



Q13: 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 2013 n=701



Attitudes Towards the Airport

• Nearly two in ten (17%) residents who live downtown south of Queen are dead set against the airport, while 68% are in favour and 15% don't care either way.

	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
Base	700	75	<i>75</i>	75	<i>75</i>	300	100
I'm personally dead set against having an airport on the island and believe it's bad for Toronto	10%	12%	9%	10%	11%	17%	10%
I'm personally in favor of having an airport on the island and believe it's good for Toronto	65%	67%	62%	60%	68%	68%	71%
I really don't care one way or the other about having an airport on the island	21%	19%	28%	24%	20%	15%	14%

Q13: And thinking about the Billy Bishop Toronto City Airport, which of the following would best describe your attitude toward the airport

and its operations?

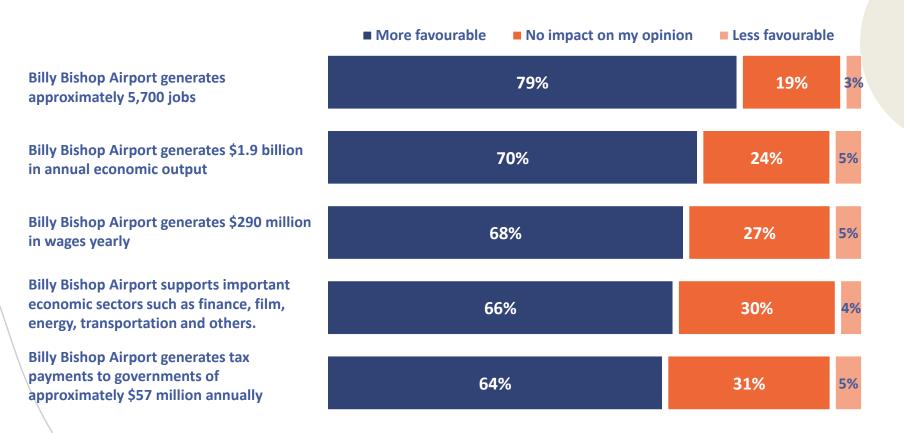
Base:

All Respondents 2013 n=701



Favourability Towards the Airport

• After hearing various statements about Billy Bishop Airport from the economic impact report, the job creation angle, in particular, makes residents more favourable towards the airport, but each statement has a positive impact on favourability.



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:

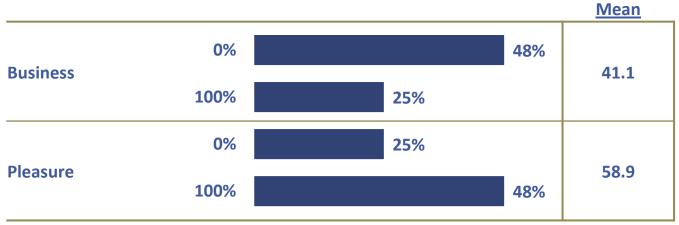
Base: All Respondents 2013 n=701

Q13a:



Business Vs. Personal Use

• Only one quarter (25%) of BBTCA users are exclusively business passengers. In fact, half (48%) are exclusively pleasure or personal travelers. Further, 59% of Torontonian's trips through the airport is characterized as pleasure, while 41% is characterized as businesses.



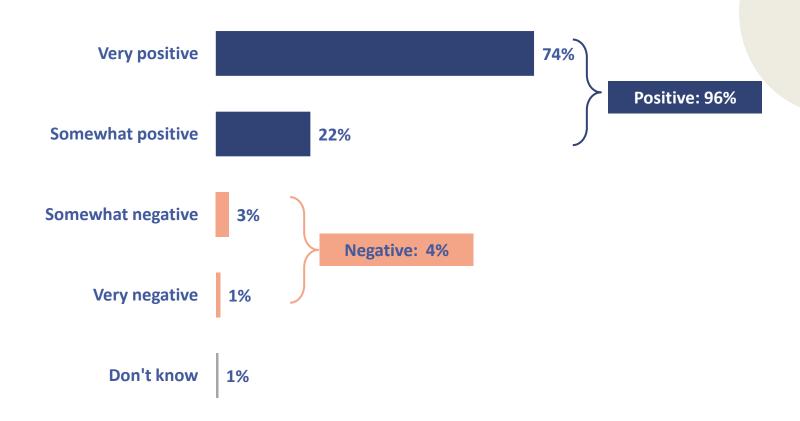
Mean Incl 0		Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
Base		(n=276)	(n=19)	(n=15)	(n=19)	(n=23)	(n=148)	(n=52)
Business								
	0%	48%	33%	53%	58%	44%	43%	48%
	100%	25%	20%	33%	22%	35%	18%	24%
	Mean	41.1	48.1	42.4	35.3	44.1	38.1	41.6
Pleasure								
	0%	25%	20%	33%	22%	35%	18%	24%
	100%	48%	33%	53%	58%	44%	43%	48%
	Mean	58.9	51.9	57.6	64.7	55.9	61.8	58.4

Q13aa. 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?



Ratings overall experience - BBTCA

• The overall experience of passengers traveling through BBTCA has been positive (96%). Just 4% say that their overall experience has been negative.



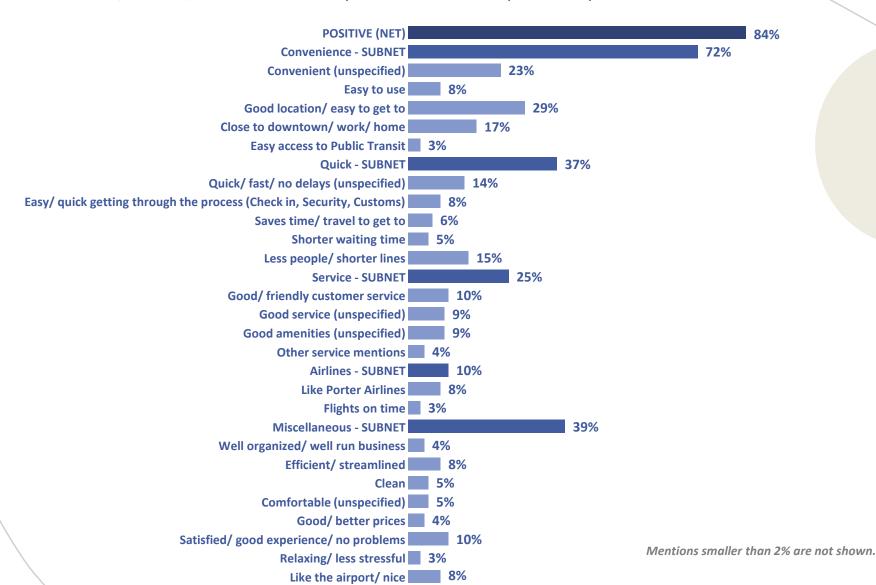


Q13c.

Base:

Comments about Positive Experience

Convenience, location, and shorter lines top the reasons for the positive experience.





Comments about Negative Experience

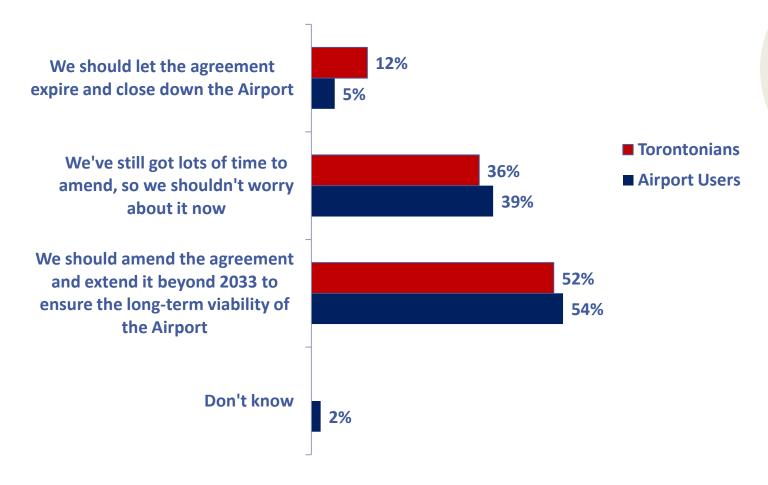
Those with a negative experience cite the ferry and poor location as the reasons why their impression is negative.





Extension of Tripartite Agreement

 Given that the Tripartite Agreement that governs Billy Bishop airport expires in 2033 and the airport would cease to operate without an extension, a majority of Torontonians (52%) and airport users (54%) believe that the agreement should be extended beyond 2033 to ensure the long-term viability of the Airport.





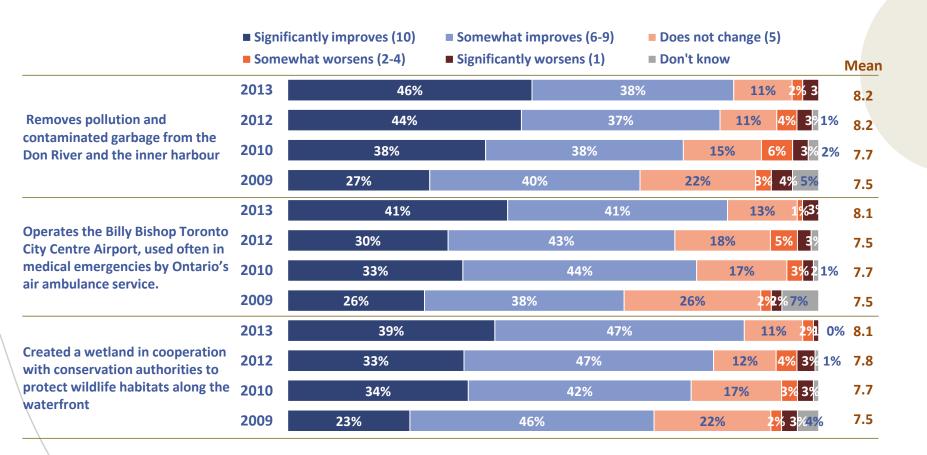
Extension of Tripartite Agreement (among Users)

• One half (50%) of users living south of Queen believe the agreement should be extended. Four in ten (37%) think there is still lots of time to amend, while 12% think the agreement should expire and the airport should close down.

	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
Base	(n=276)	(n=19)	(n=15)	(n=19)	(n=23)	(n=148)	(n=52)
We should let the agreement expire and close down the Airport	5%	-	6%	-	10%	12%	4%
We've still got lots of time to amend, so we shouldn't worry about it now	39%	48%	47%	27%	23%	37%	46%
We should amend the agreement and extend it beyond 2033 to ensure the long-term viability of the Airport	54%	52 %	47%	73%	59%	50%	48%
Don't Know	2%	-	-	-	9%	1%	2%



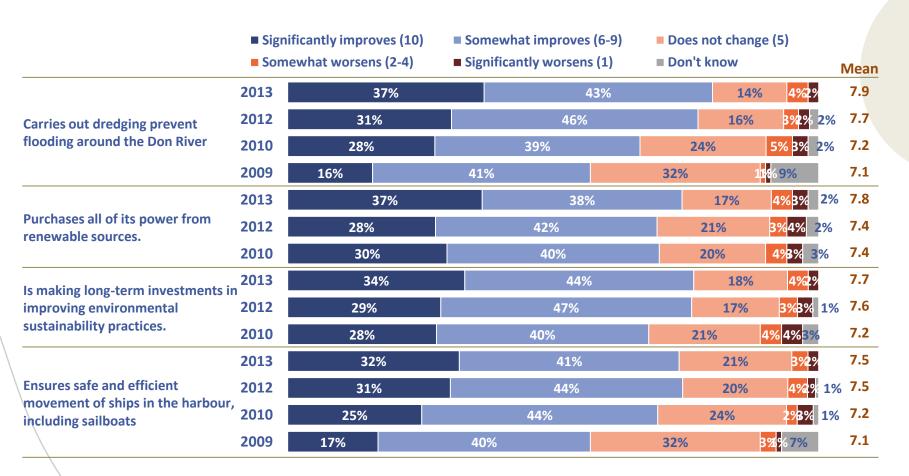
Removing pollution, operating the airport and creating a wetland are the most favourable activities
 conducted by the TPA. In general, impressions have improved slightly over last year in most categories.



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 2013 n=701

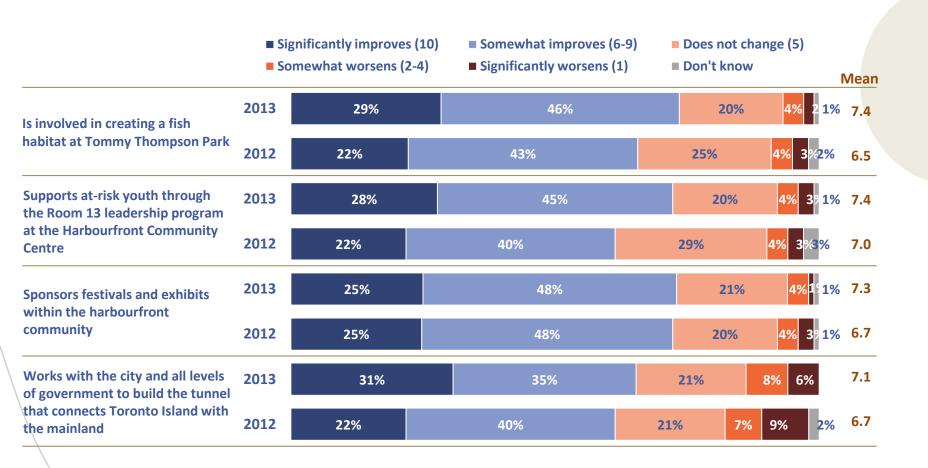




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Base: All Respondents 2012 n=700

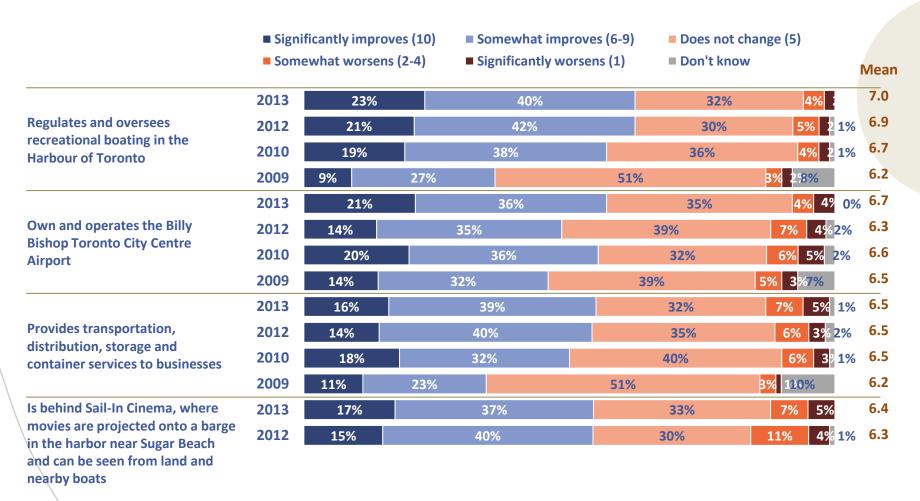




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Base: All Respondents 2013 n=701





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Base: All Respondents 2012 n=700

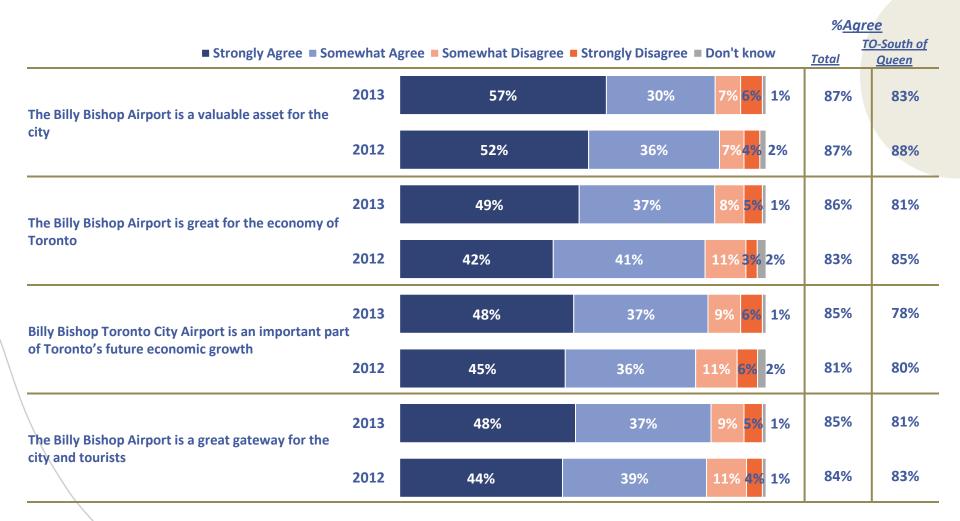


Q15:

Base:

Thoughts about TPA and Billy Bishop Airport

• Most (87%) continue to believe that BBTCA is a valuable asset for the city, and that it is great for the economy of Toronto. The airport is seen as an important part of future economic growth, and that it is a great gateway for the city and tourists.



Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements. All Respondents 2013 n=701

Ipsos Reid

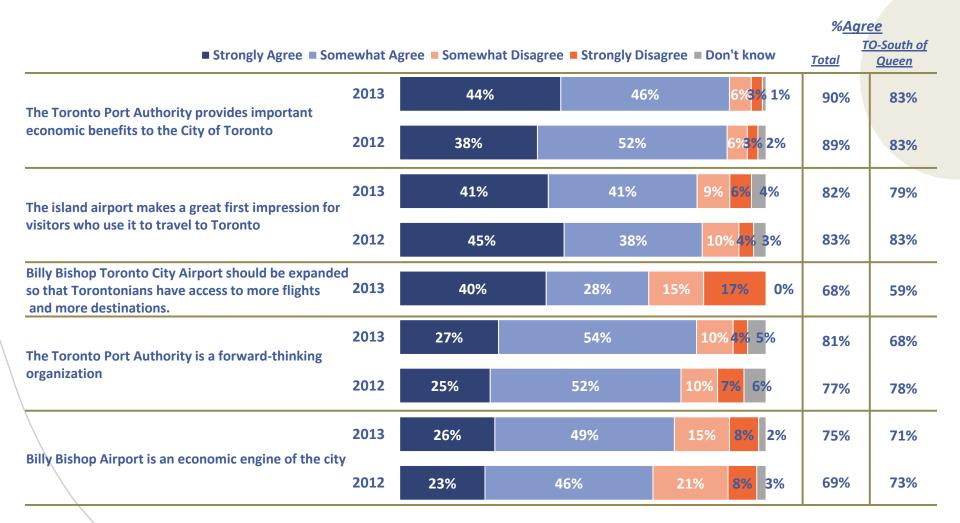


Q15:

Base:

Thoughts about TPA and Billy Bishop Airport

Nine in ten (90%) believe the TPA provides important economic benefits to the city, and most (81%) say it is a forward thinking organization. Three quarters (75%) say BBTCA is an economic engine of the city, and seven in ten (68%) – including 59% South of Queen – believe BBTCA should be expanded so that Torontonians have access to more flights and more destinations.

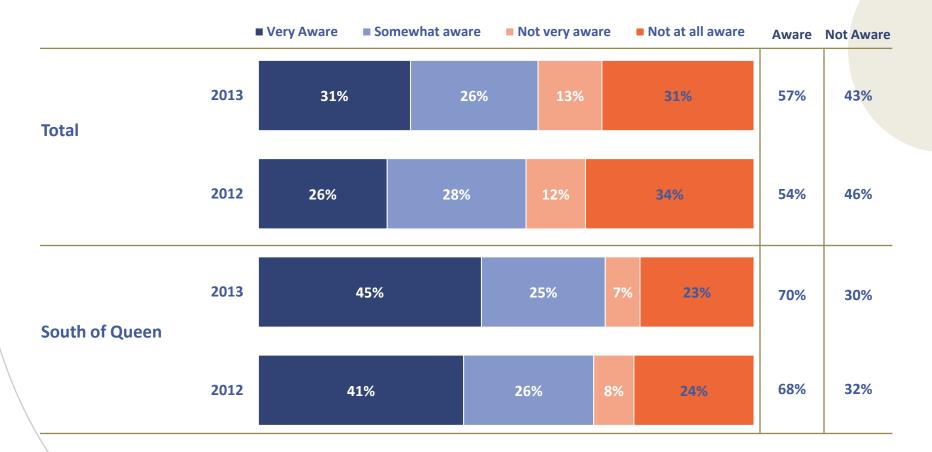




Q16:

Awareness of the Construction of an Under-water Pedestrian Tunnel

 Awareness of construction of the tunnel is up slightly from last year to 57% who are aware. South of Queen, seven in ten (70%) are aware of the construction.



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).

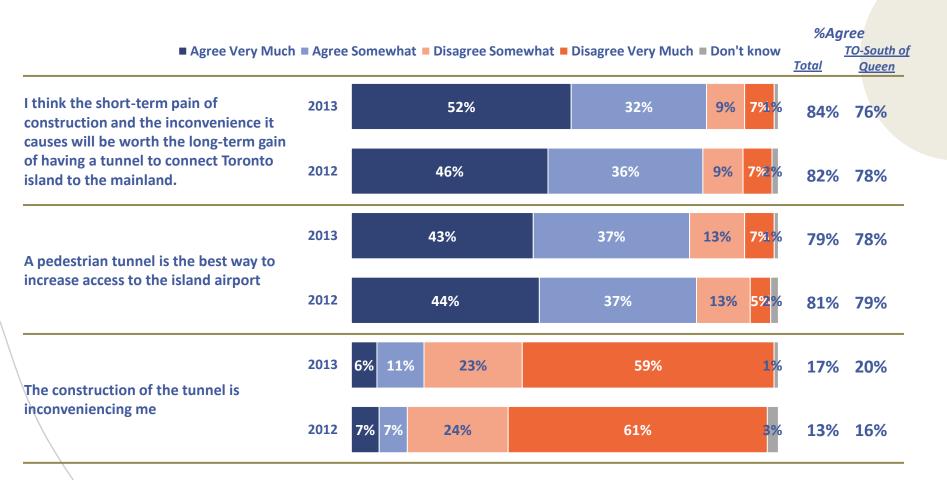
An under-water pedestrian tunnel is currently being built to link the island to the mainland. Before today, to what extent are you aware of this construction? Are you...?

Ipsos Reid



Thoughts about Pedestrian Tunnel

• Most believe the construction will be worth it, and most continue to believe that the tunnel is the best way to increase access to the island airport. Nearly two in ten (17%, up 4 points), say the construction of the tunnel is inconveniencing them, including 20% south of Queen.



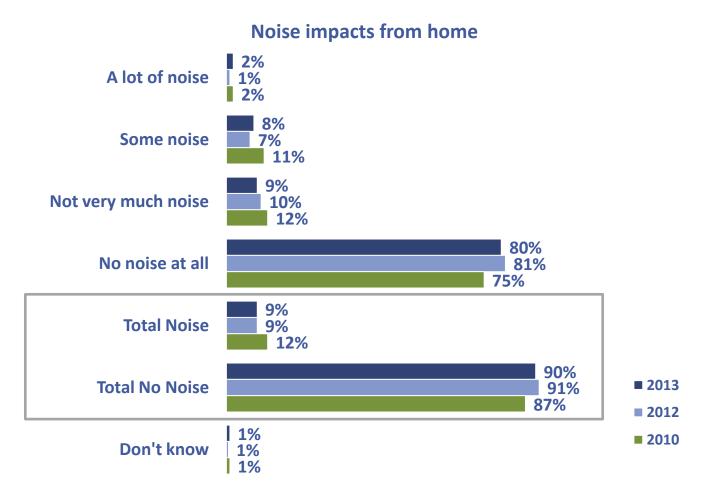
Q17: I'd like to read you some statements about the pedestrian tunnel. Please tell me whether you agree very much, agree somewhat, disagree somewhat or disagree very much.

Ipsos Reid



Noise Issues Associated with the Airplanes

• The total proportion of Torontonians who hear noise associated with airplanes that takeoff or land at BBTCA has remained flat since last year at 9%.



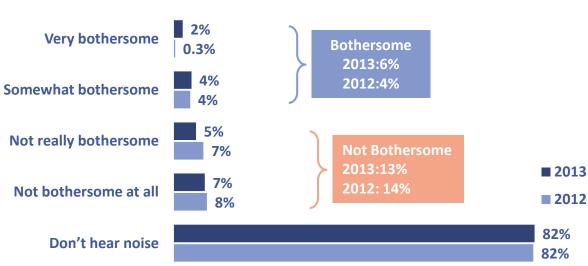
Q18: From your home, do you hear any sound or noise associated with the airplanes that land at, and take off from, the Billy Bishop Toronto



Hear Noise and are Bothered

- 6% (up 2 points) of Toronto's population hear noise from BBTCA and is bothered by it.
- South of Queen Street, 17% of residents hear noise and are bothered by it.

Attitudes toward noise



	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
Base	700	<i>7</i> 5	75	75	<i>75</i>	300	100
Very bothersome	2%	3%	2%	3%	-	6%	-
Somewhat bothersome	4%	3%	1%	2%	4%	11%	7%
Total Bothersome	6%	6%	3%	5%	4%	17%	7%

Q19:

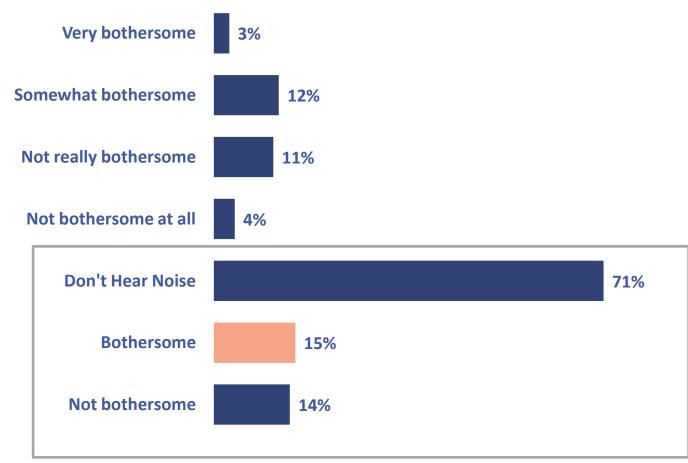
And, overall, would you say that this sound or noise is very bothersome, somewhat bothersome, not really bothersome or not bothersome at all?



Base South of Queen: All respondents n = (300)

South of Queen - Hear traffic Noise and are Bothered by It

■15% of residents living South of Queen hear traffic noise associated with BBTCA and are bothered by it, 14% aren't bothered by it, and 71% don't hear it.



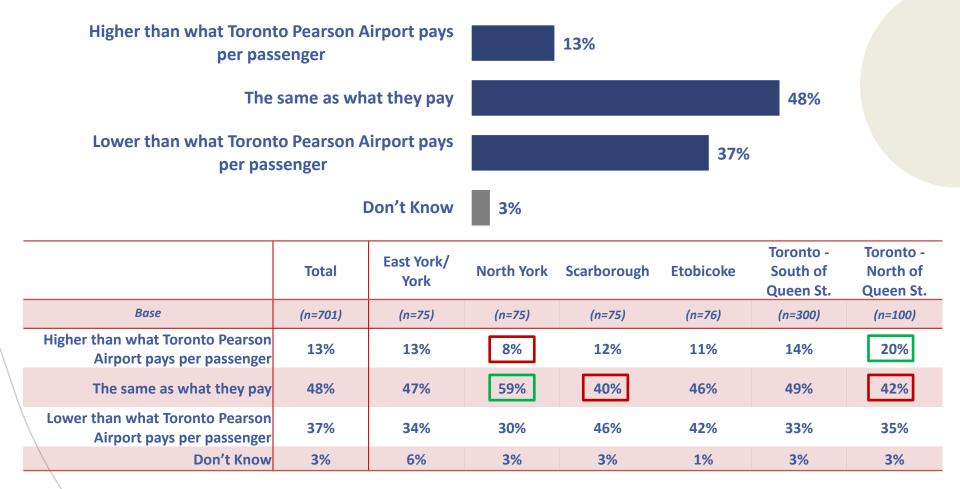
Q20: From your home, do you hear any sound or noise associated with automobile traffic that is directly linked to increased airport activity at Billy Bishop airport?

Q21: And, overall, would you say that this sound or noise from this automobile traffic is very bothersome, somewhat bothersome, not really bothersome or not bothersome at all?



Payments in Lieu of Taxes

•Torontonians believe the PILT that BBTCA pays should be either the same (48%) or lower (37%) than what Pearson pays on a per-passenger basis. Just 13% believe BBTCA should pay a higher PILT than Pearson.

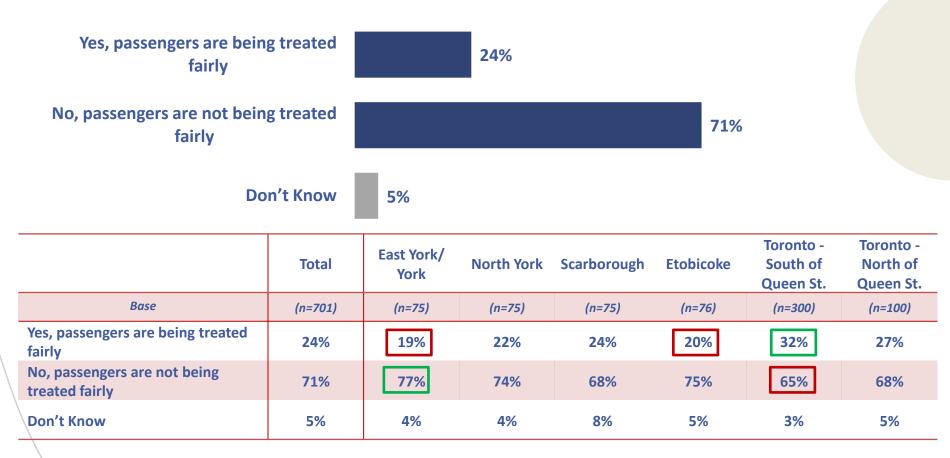


Q21a. It is customary in Canada for airports to pay a fee-per-passenger to the City in which it operates instead of paying municipal land taxes. Most major airports, including Toronto's Pearson Airport and the Billy Bishop Toronto City Airport, pay this fee in lieu of taxes. Do you think that the fee-per-passenger that the Billy Bishop Toronto City Airport pays should be...



PILTs and Fairness

•Given the recent decision by City Council that BBTCA should pay a higher amount per passenger than what Pearson presently pays, most (71%) believe that BBTCA passengers are not being treated fairly by the decision, while 24% think they are.

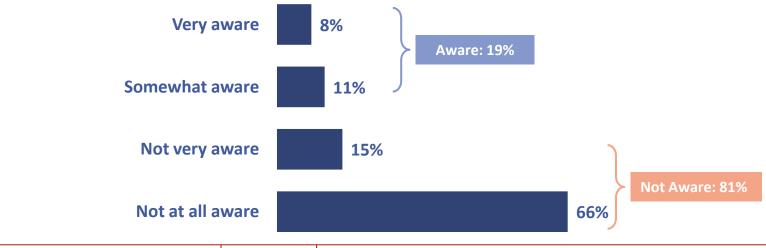


Q21b. On April 3, 2013, City of Toronto Staff recommended that City Council accept a per-passenger payment in lieu of taxes for the Billy Bishop Toronto City Airport that was the same amount as Toronto Pearson Airport -- \$0.94 per passenger. A majority of City Councillors rejected their staff's proposal, demanding that the Toronto Port Authority charge its passengers a far higher rate than Toronto Pearson Airport. Do you believe that City Councillors are treating Billy Bishop passengers fairly by charging passengers more to fly out of the island airport than from Pearson Airport?



Awareness of Tunnel Financing

•Just 19% are aware that the tunnel project is being financed through an airport-improvement fee and not taxpayers money, although awareness is higher downtown north (35%) and south (33%) of Queen Street.



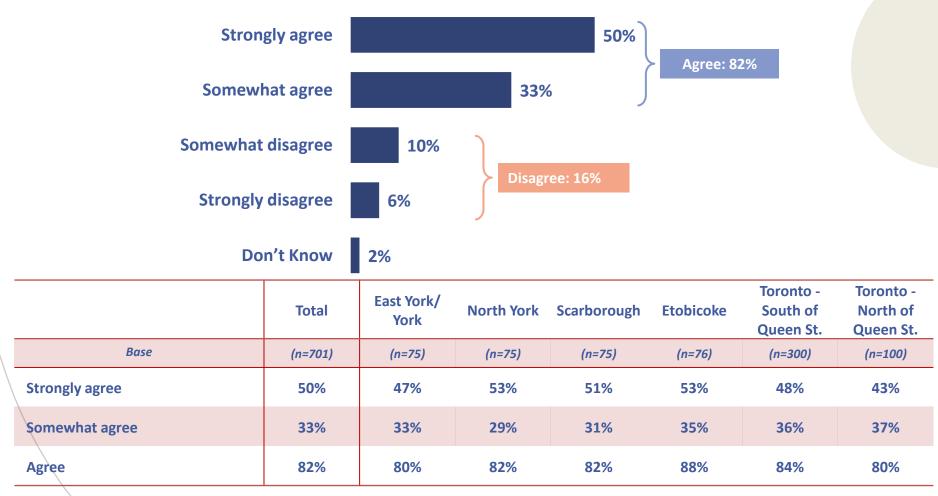
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	Base	(n=701)	(n=75)	(n=75)	(n=75)	(n=76)	(n=300)	(n=100)
\	Very aware	8%	10%	4%	4%	4%	15%	19%
	Somewhat aware	11%	7%	11%	4%	12%	18%	17%
	Aware	19%	17%	14%	7%	16%	33%	35%

Q21c. How aware are you that the pedestrian tunnel project is being paid for by passengers through a portion of the airport improvement fee, and that no taxpayer's money is involved? Are you ...



Level of Agreement with tunnel project financed by fees collected from passengers

■Most 82% agree that they like that the tunnel is being funded by passengers and not taxpayers.



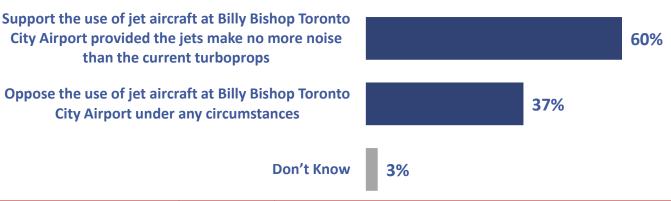
Q21d. To what extent do you agree or disagree with the following statement: I like that the tunnel project is being financed solely by collected from airport passengers and not by all taxpayers. Do you ...

lpsos Reid



Support for Use of Jet Aircraft at BBTCA

•Six in ten (60%) Torontonians, and 50% of those living South of Queen, support the use of jet aircraft at BBTCA, provided the jets make no more noise than the current turboprops.



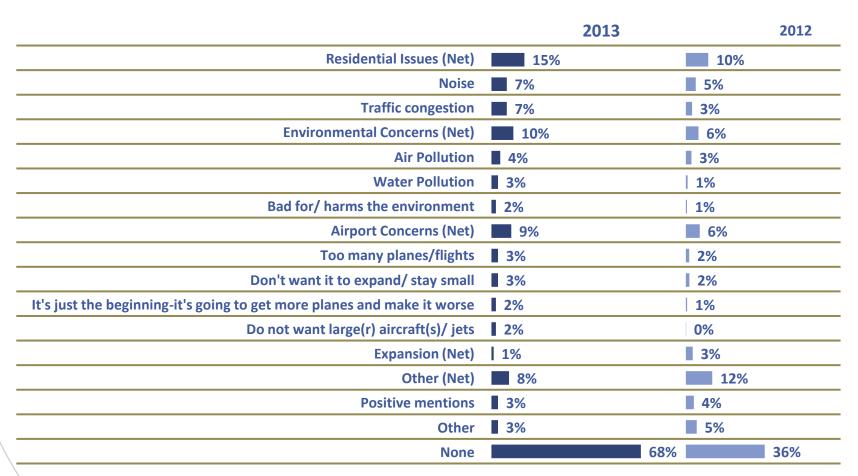
	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
Base	(n=701)	(n=75)	(n=75)	(n=75)	(n=76)	(n=300)	(n=100)
Support the use of jet aircraft at Billy Bishop Toronto City Airport provided the jets make no more noise than the current turboprops	60%	57%	58%	68%	62%	50%	58%
Oppose the use of jet aircraft at Billy Bishop Toronto City Airport under any circumstances	37%	42%	40%	29%	33%	50%	40%
Don't Know	3%	1%	3%	3%	5%	1%	2%

Q21e. 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?



Concerns about the Impacts of the Billy Bishop Toronto City Airport

•Concerns related to noise and traffic congestion are up this year over last, as are mentions of expansion, jets, more activity. However, significantly more (68%) respondents didn't mention any concerns this year.



Mentions smaller than 2% are not shown.



Concerns about BBTCA – South of Queen

•The concerns South of Queen are more pronounced than in the other areas of the City, with noise, traffic and expansion concerns all up this year over last.

	2013	2012
Residential Issues (Net)	23%	19%
Noise	13%	8 %
Traffic congestion	9%	8 %
Too many vehicles	■ 3%	0%
Safety of residents/ danger	■ 2 %	I 1%
Cost to the taxpayers	■ 2%	I 1%
Waterfront is becoming too crowded/busy	I 2%	I 1%
Residents are more affected/ nuisance	■ 2 %	■ 2%
Environmental Concerns (Net)	11%	10%
Air Pollution	6 %	6 %
Water Pollution	■ 2%	l 1 %
Airport Concerns (Net)	11%	10%
Don't want it to expand/ stay small	6 %	0.3%
Too many planes/flights	■ 3%	4 %
Do not want large(r) aircraft(s)/ jets	▮ 2%	0%
Expansion (Net)	■ 3%	■ 2%
Do not like the idea of the tunnel / underpass	I 2%	I 1%
Other (Net)	9%	15%
Positive mentions	1 2%	4 %
Ruins the view/don't like seeing planes	I 2%	1%
Other	■ 3%	9%
None	59%	28%

Mentions smaller than 2% are not shown.

All Respondents 2012n=700



Demographics



Weighted Demographics

Education		
Elementary school	1%	
High school	15%	
Community college	20%	
University	39%	
Post-graduate/ Professional	25%	
(DK/NS)	1%	
Income		
Under \$30,000	11%	
\$30,000 to just under \$60,000	15%	
\$60,000 to just under \$100,000	25%	

\$100,000 or more 39%

Don't Know 11%

Gender	
Male	48%
Female	52%
Genderation	
Male 18 To 34	16%
Male 35 To 54	18%
Male 55+	13%
Female 18 To 34	14%
Female 35 To 54	21%
Female 55+	18%

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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