



Ipsos Reid

# 2014 Public Opinion Survey

Toronto Port Authority Tracking Study

Toronto  
Port  
Authority

Administration  
Portuaire  
de Toronto



August 2014

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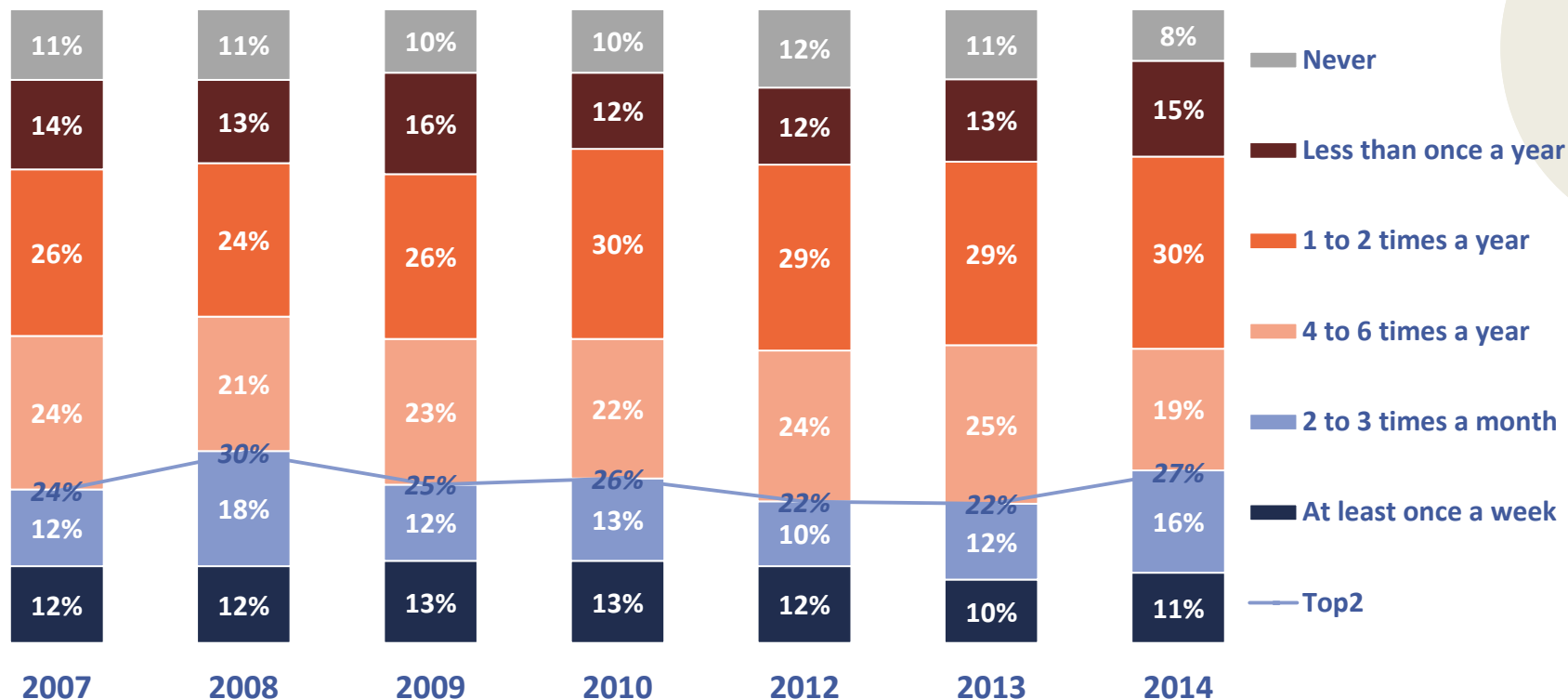
# Methodology

- *These are the findings of an Ipsos Reid poll conducted on behalf of the Toronto Port Authority*
- *The study was in field from August 8<sup>th</sup> to 19<sup>th</sup>, 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 =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 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 2013.*

# Detailed Findings

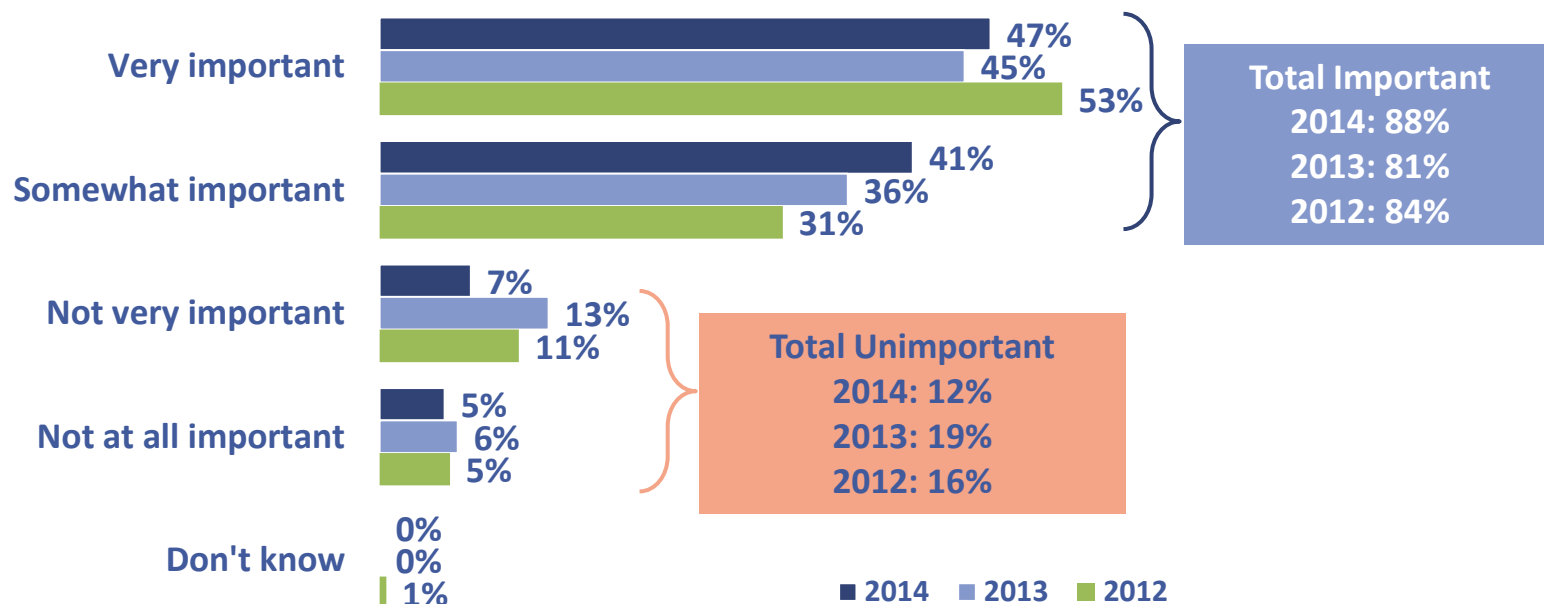
## Frequency of Visiting the Waterfront Area in Toronto

- The proportion of Torontonians who say they regularly visit the waterfront has increased slightly compared to 2012 and 2013 (27%, up 5 points), while fewer (8%, down 3 points) indicate that they never visit Toronto's waterfront.



# Importance of Improving Toronto's Waterfront

- The importance of improving Toronto's waterfront has increased 7 points since last year (now sitting at 88%, with 47% thinking its 'very important'). While those living south of Queen most see improving the waterfront as 'very important' (59%) they are least likely to say it is important overall (86%).



	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
Base	(n=700)	(n=75)	(n=75)	(n=75)	(n=76)	(n=300)	(n=100)
Very Important	47%	38%	40%	42%	50%	59%	60%
Somewhat Important	41%	54%	49%	37%	40%	26%	34%
Total Important	88%	93%	89%	79%	90%	86%	94%

## Direction of Toronto's Waterfront Changes

- Four in five (81%) believe that the changes along Toronto's waterfront are headed in the right direction, compared to one in ten (13%) who think they are headed in the wrong direction. Those North of Queen (85%) and in Scarborough (88%) most believe its headed in the right direction, while those in North York (21%) most see it headed the wrong way.

Right direction



81%

Wrong direction



13%

Don't know



6%

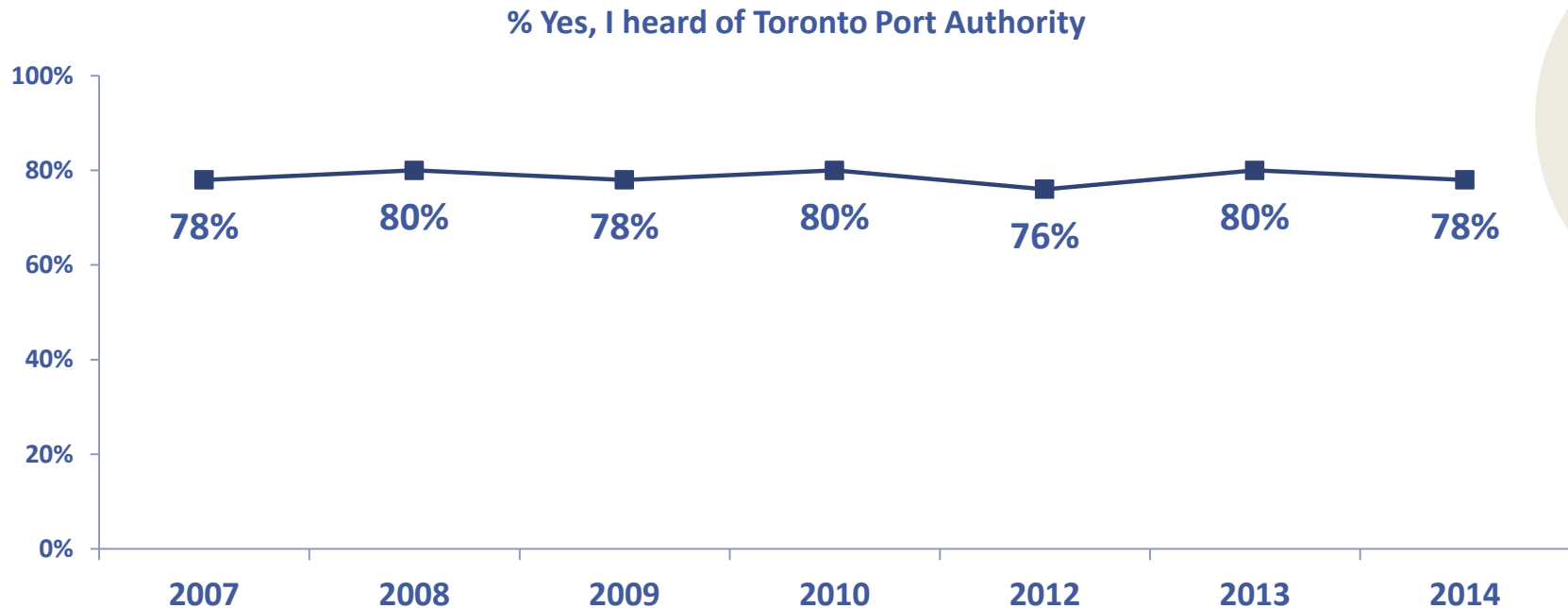
	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
<i>Base</i>	<i>(n=700)</i>	<i>(n=75)</i>	<i>(n=75)</i>	<i>(n=75)</i>	<i>(n=75)</i>	<i>(n=300)</i>	<i>(n=100)</i>
Right Direction	81%	76%	73%	88%	81%	80%	85%
Wrong Direction	13%	14%	21%	7%	14%	14%	8%
Don't Know	6%	10%	6%	5%	5%	5%	8%

Q: 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 right direction or wrong direction?

Base: All Respondents (n=700)

## Prompted Awareness of TPA

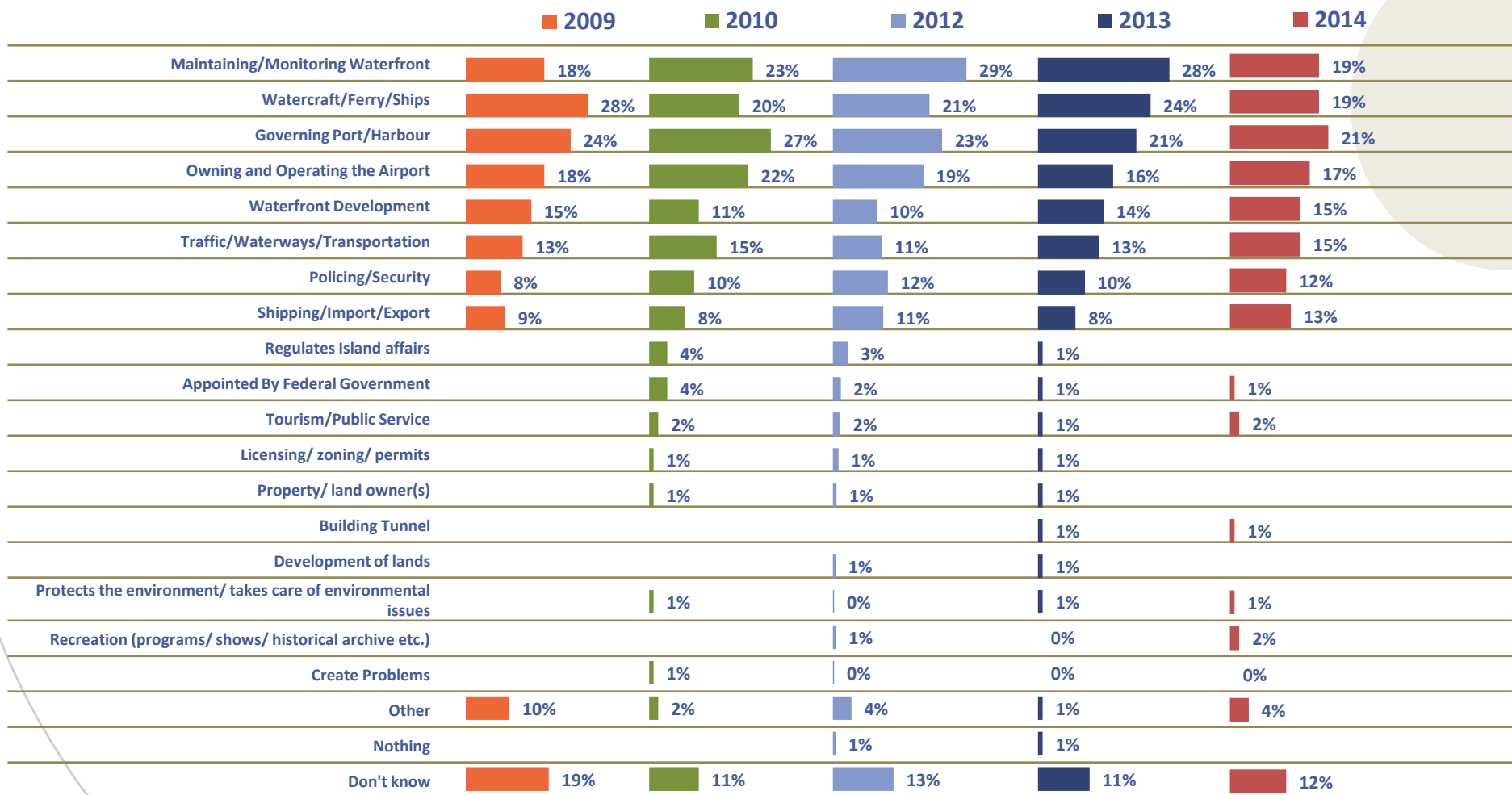
- Awareness of the TPA is down 2 points from last year but still sitting at a consistent four in five (78%) Torontonians.



	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
Base	(n=700)	(n=75)	(n=75)	(n=75)	(n=75)	(n=300)	(n=100)
Yes	78%	79%	70%	81%	79%	85%	82%

## Perception of TPA's Responsibility

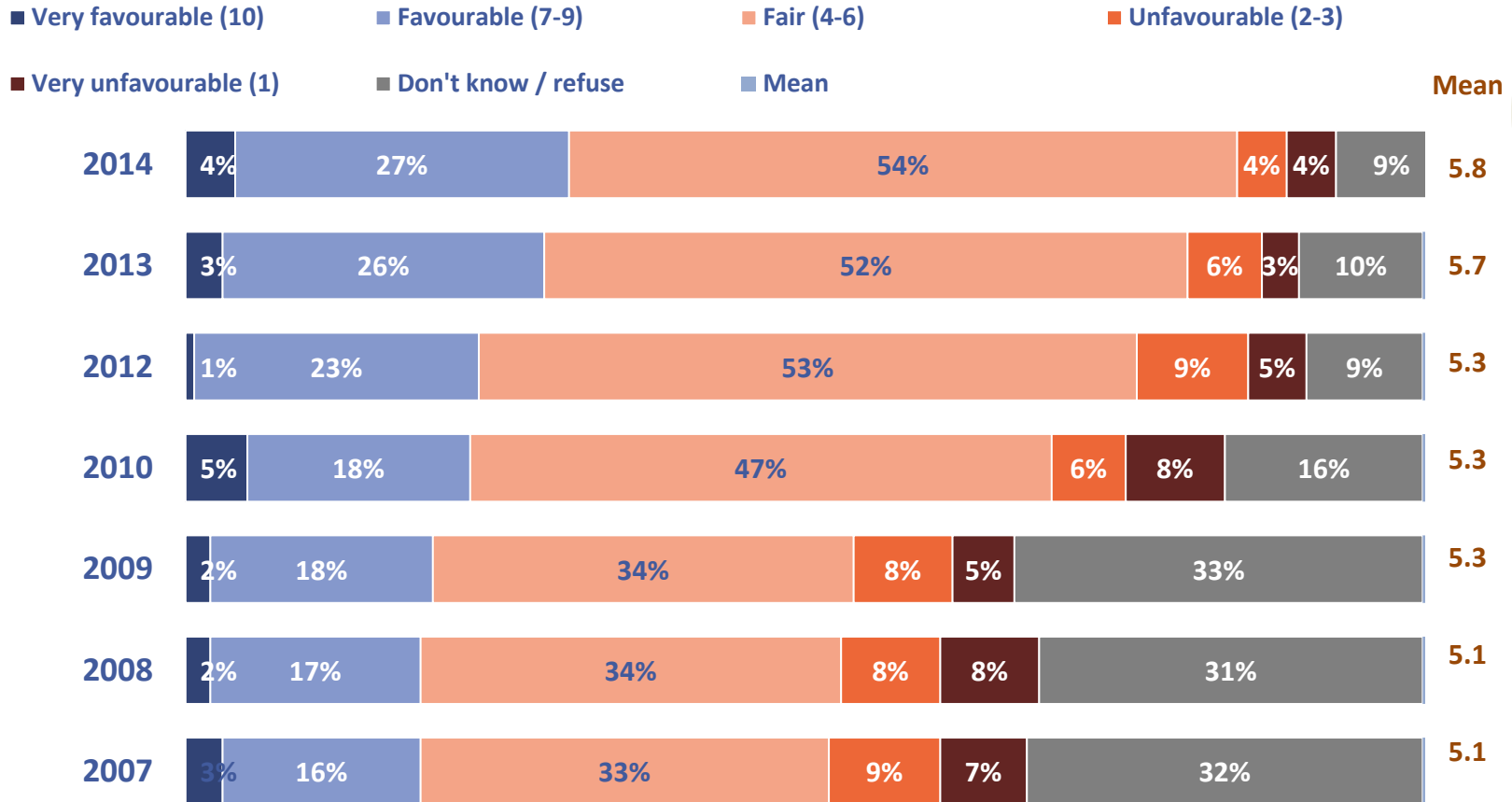
- Perceptions of TPA's responsibility towards maintaining and monitoring the waterfront (19%, down 9 points) and watercraft and ships (19%, down 5 points) has dipped since last year, while perceptions of owning and operating the airport (17%, up 1 point) are on par with previous years.





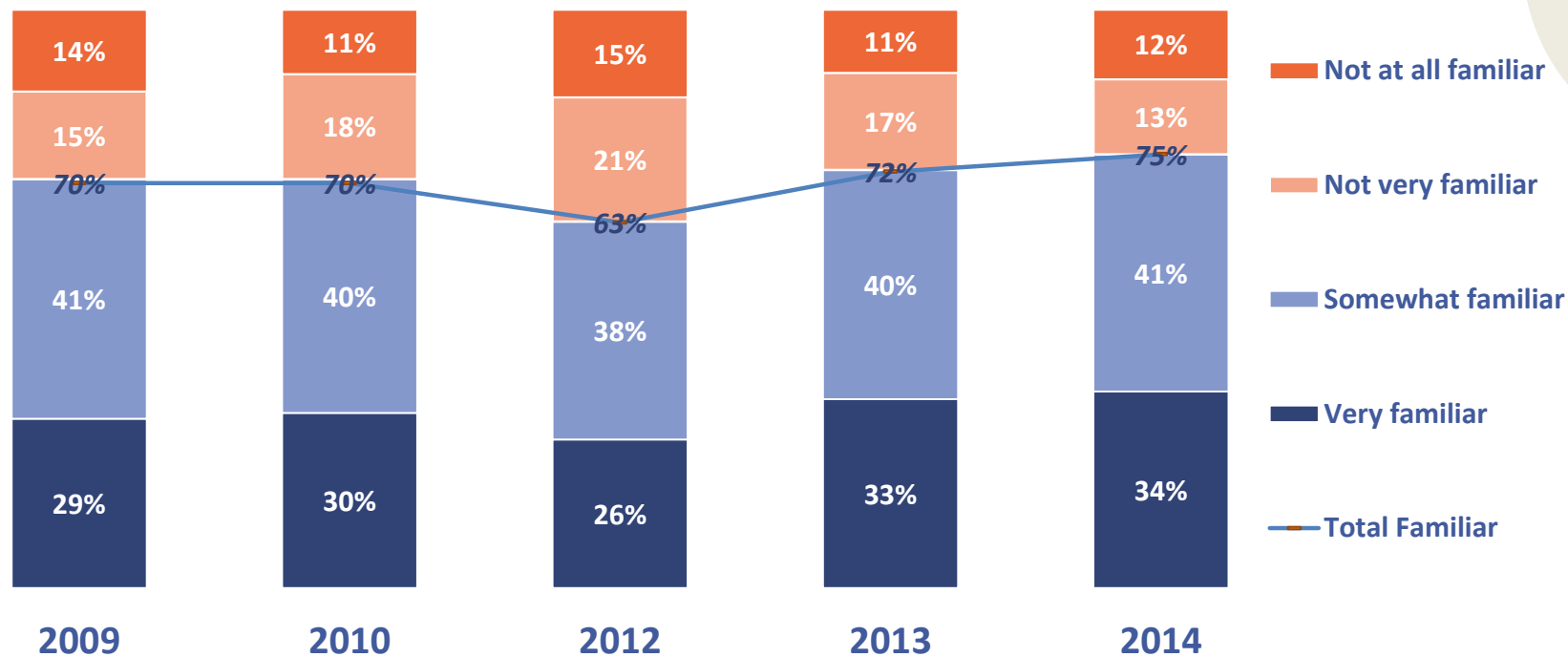
# Impression of the Toronto Port Authority

- Favourability of the TPA sits at 5.8 out of 10, the highest this metric has been since 2007. Three in ten (31%) are favourable to the organization, up 2 points since last summer.



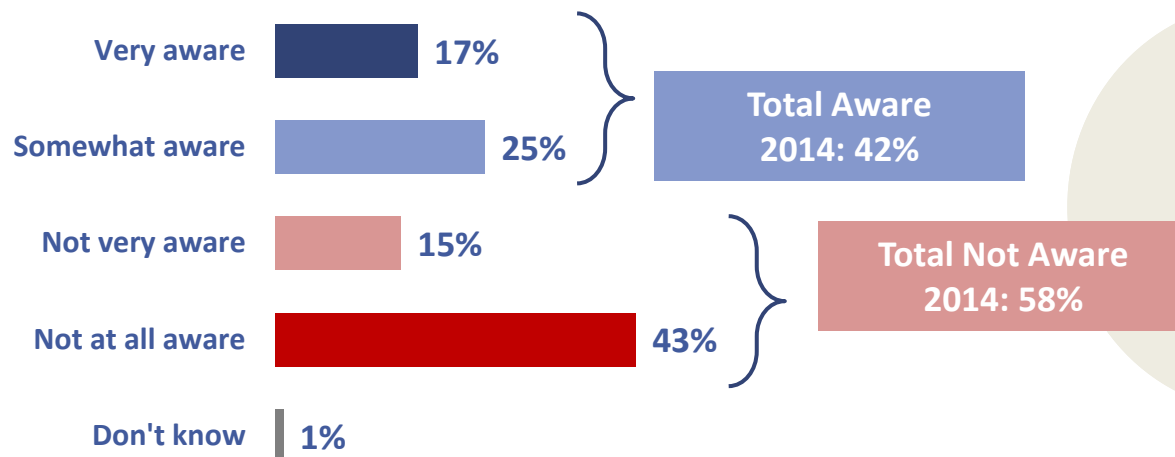
## Familiarity with the Billy Bishop Toronto City Airport

- Familiarity with the BBTCA is currently the highest it has ever been since 2009 (75% familiar, up 3 points from this time last year).



# Awareness of TPA Owning and Operating BBTCA

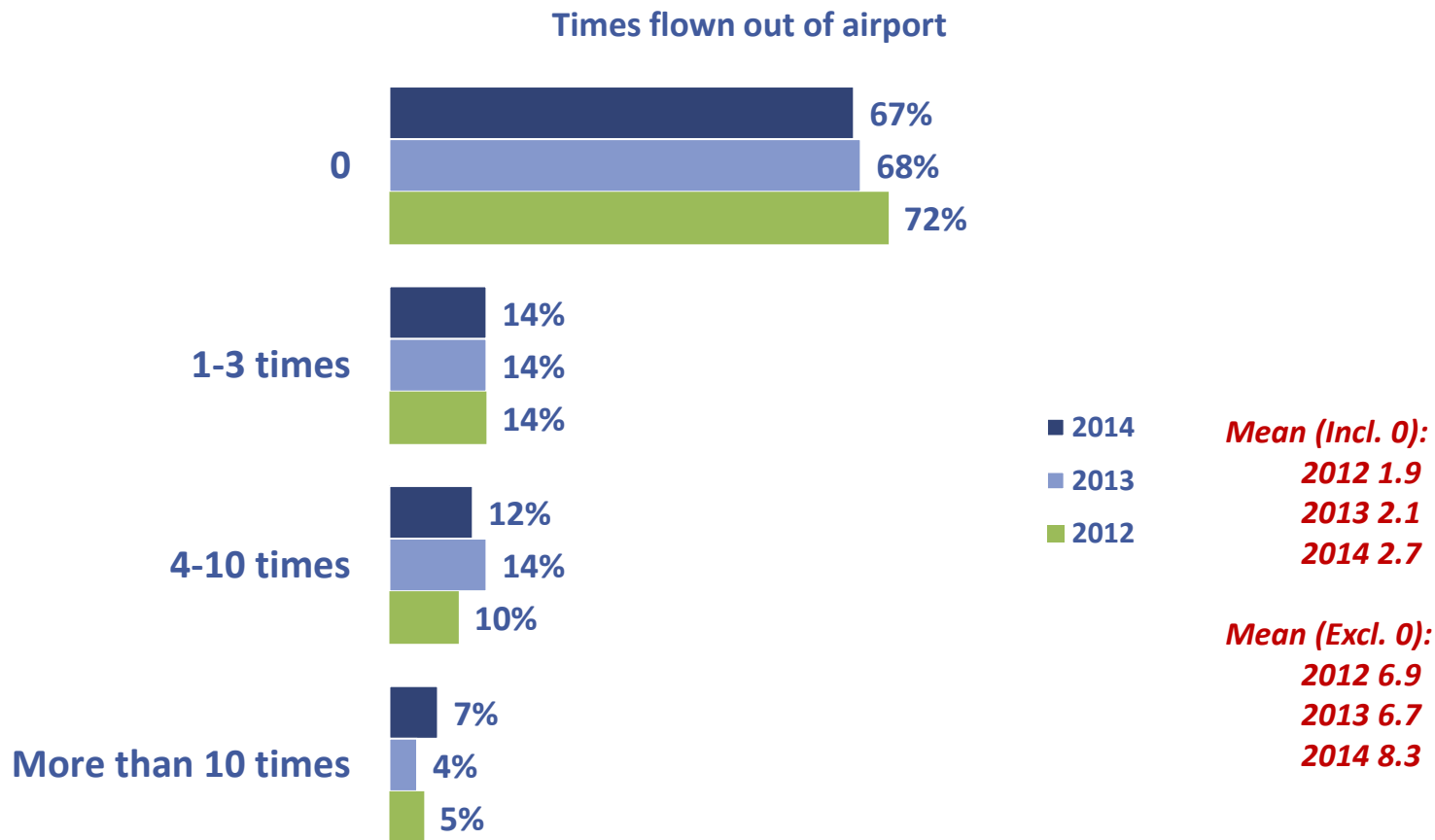
- More Torontonians are not aware (58%) that the BBTCA is owned and operated by the TPA than are aware (42%) of this fact. Those living downtown (South of Queen – 53%/North of Queen – 48%) are most aware of this.



	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
<i>Base</i>	(n=700)	(n=75)	(n=75)	(n=75)	(n=75)	(n=300)	(n=100)
Very Aware	17%	14%	18%	16%	10%	28%	18%
Somewhat Aware	25%	26%	19%	21%	34%	25%	30%
Total Aware	42%	40%	37%	37%	44%	53%	48%

# 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 2.7 times, with 33% of Torontonians having used the airport (up 1 point). Those who have flown out of BBTCA continue to be doing so more often (8.3 times, up from 6.7 times).



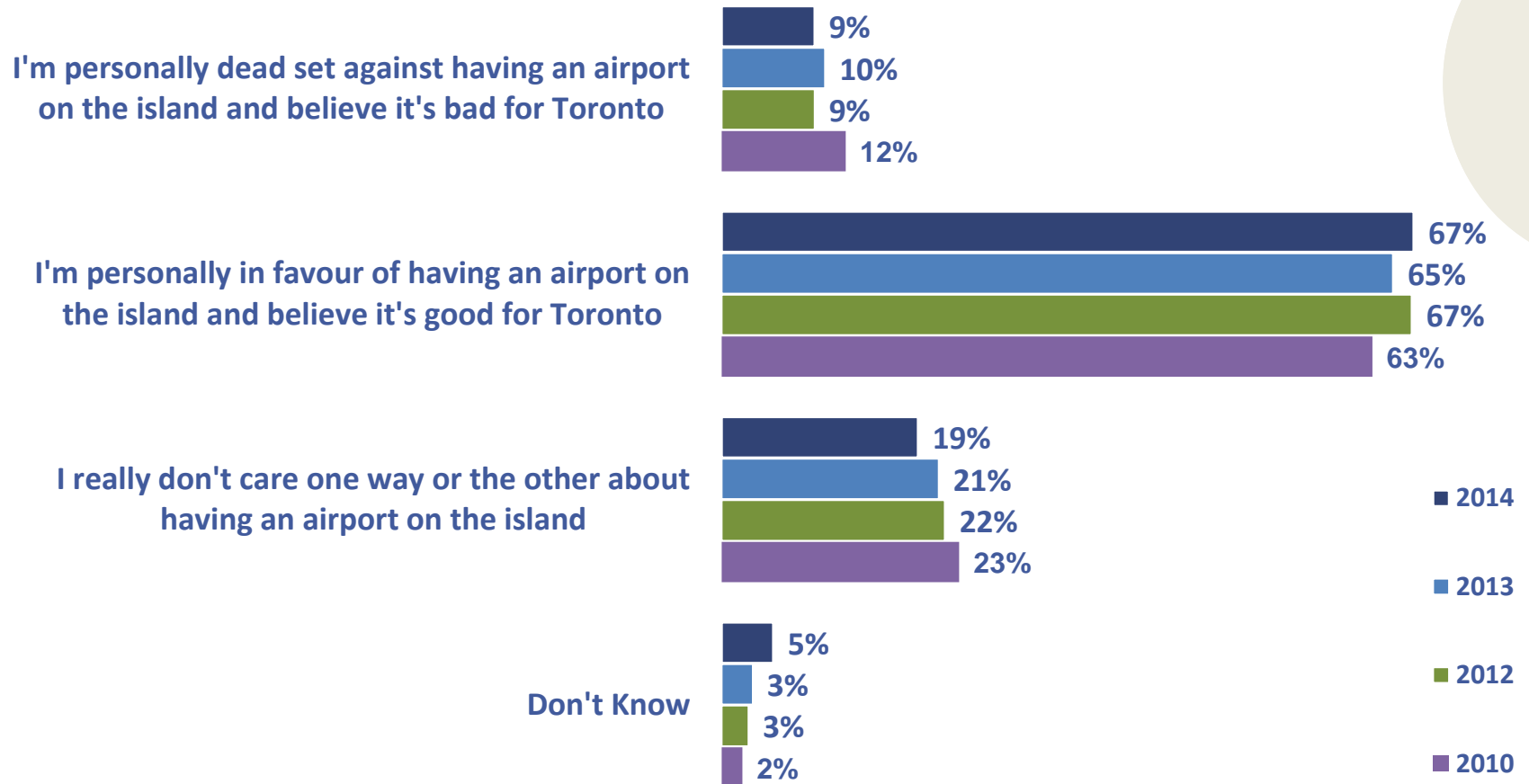
## Frequency of BBTCA Use – Region

- Residents of downtown are most likely to have used the BBTCA, with those living south of Queen averaging the most flights (7 times on average and approximately 11 times per user). Scarborough and East York/York 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=700)</i>	<i>(n=75)</i>	<i>(n=75)</i>	<i>(n=75)</i>	<i>(n=75)</i>	<i>(n=300)</i>	<i>(n=100)</i>
0	67%	73%	71%	82%	66%	40%	54%
1-3 times	14%	12%	16%	6%	19%	24%	14%
4-10 times	12%	10%	4%	9%	14%	20%	22%
More than 10 times	7%	5%	8%	3%	1%	17%	10%
Mean (inc. 0)	2.7	1.5	2.7	1.2	1.9	6.8	4.2
Mean (exc. 0)	8.3	5.5	9.4	6.8	5.7	11.2	9.1

# Attitudes Towards the Airport

- Attitudes about the airport continue to remain consistent since 2010 as two in three (67%, up 2 points) are in favour of having an airport on the island and that its good for the city, with just one in ten (9%, down 1 point) being dead set against the airport.



# Attitudes Towards the Airport

- The airport receives widespread support across the city, led by those living downtown North of Queen (73%). Detractors are most likely found downtown South of Queen (14%).

	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
<i>Base</i>	(n=700)	(n=75)	(n=75)	(n=75)	(n=75)	(n=300)	(n=100)
I'm personally dead set against having an airport on the island and believe it's bad for Toronto	9%	11%	8%	8%	7%	14%	9%
I'm personally in favor of having an airport on the island and believe it's good for Toronto	67%	69%	63%	64%	70%	69%	73%
I really don't care one way or the other about having an airport on the island	19%	16%	23%	21%	20%	11%	15%

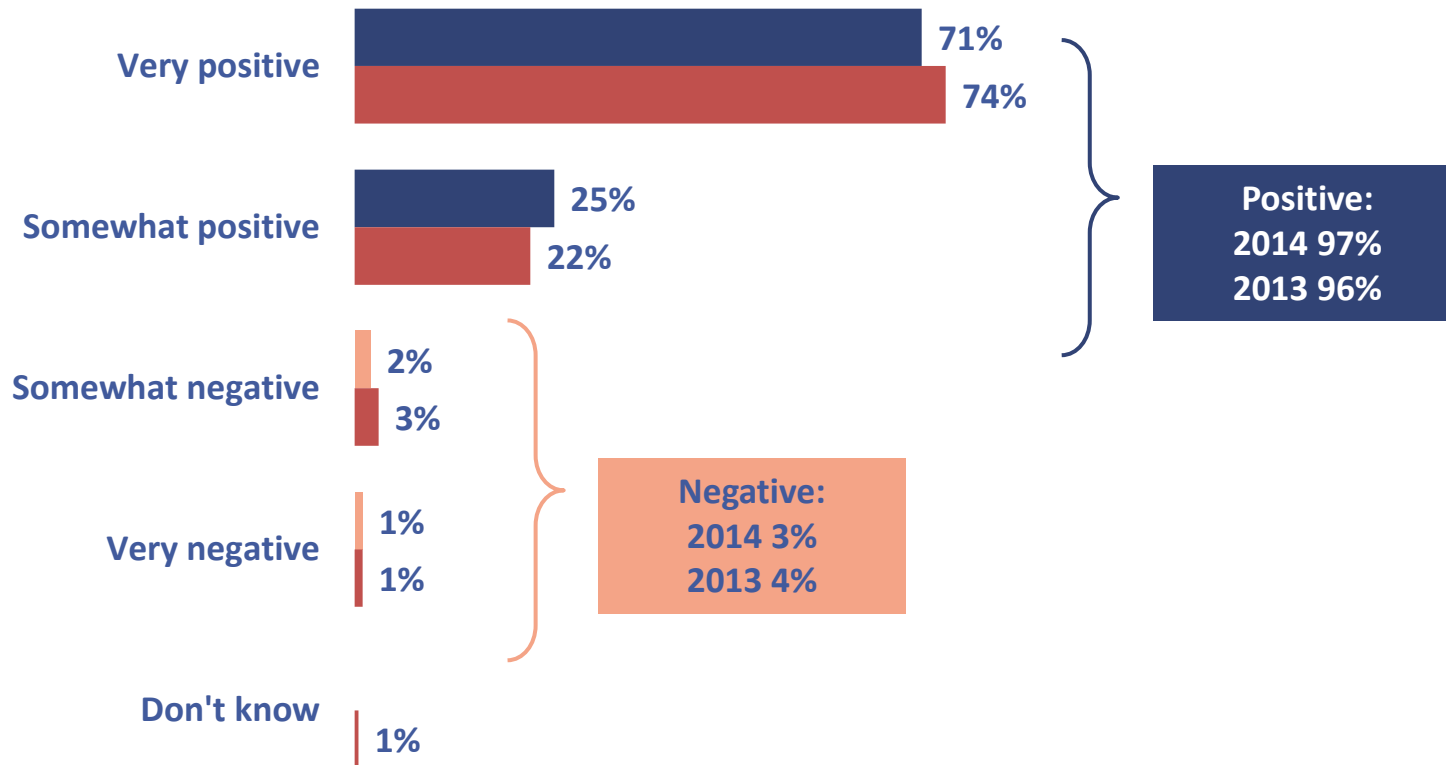
## BBTCA Usage Statistics

- One in three (33%) Torontonians has used BBTCA, including six in ten (60%) residents who live South of Queen Street.
- The average Torontonians has flown out of BBTCA 2.7 times in their life, up from 2.1 last year.
- The average user has used the airport 8.3 times in their life, up from 6.7 last year.
  - Users who live South of Queen have used it the most – 11.2 times on average
- 51% of all Torontonians travel through the airport is leisure; 49% is business.
  - More airport traffic from residents who live South of Queen St is business (54% business vs. 46% leisure).
- More Torontonians use the airport exclusively for business (38%) than exclusively for leisure (21%), although 41% use it for both.



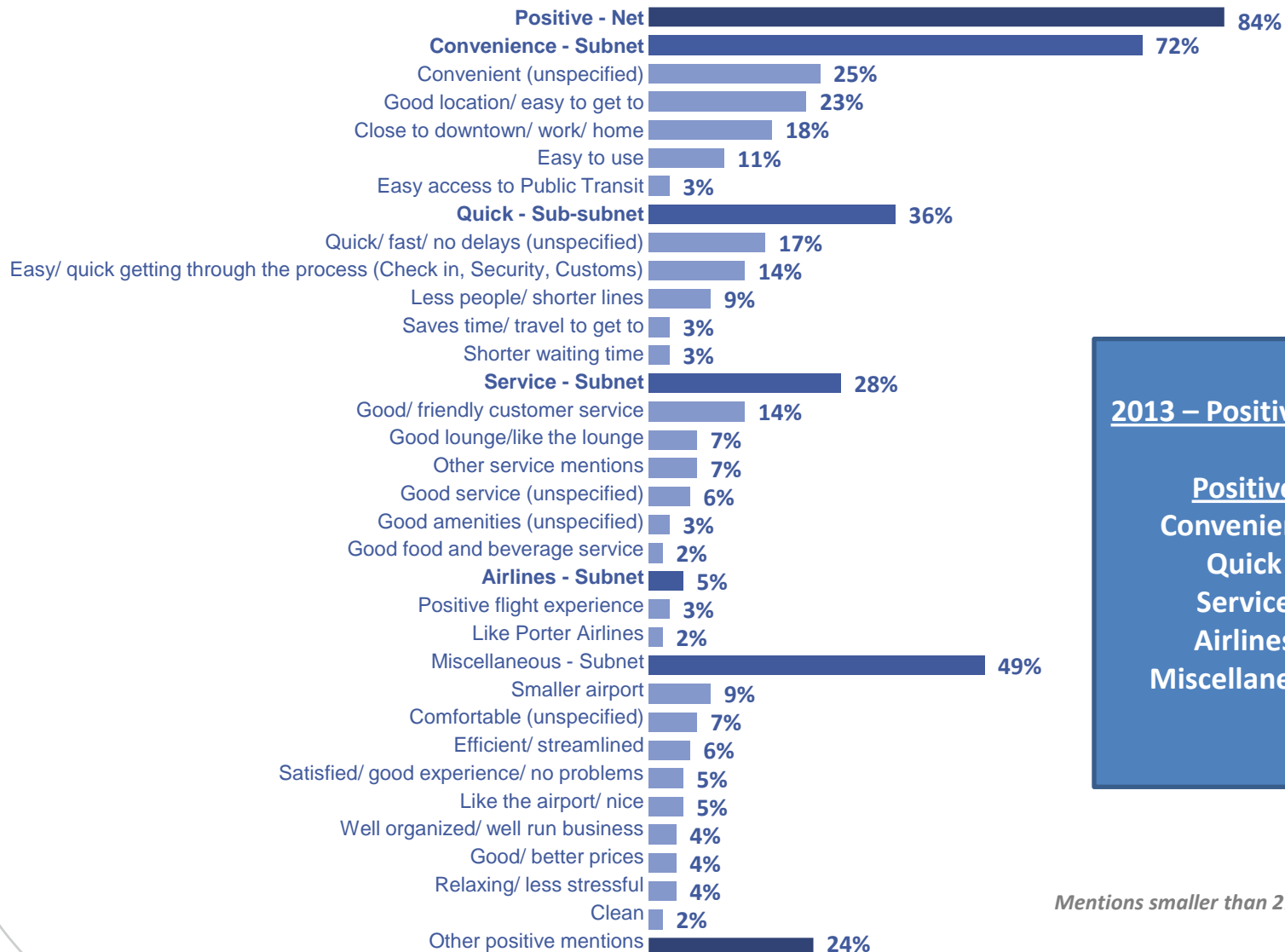
## Ratings overall experience - BBTCA

- The overall experience of passengers traveling through BBTCA continues to be extremely positive (97% overall with 71% having a very positive experience). Just 3% of users indicate having a negative experience.



# Comments about Positive Experience

- Convenience, location, and speed top the reasons for the positive experience. These reasons are unchanged from 2013.



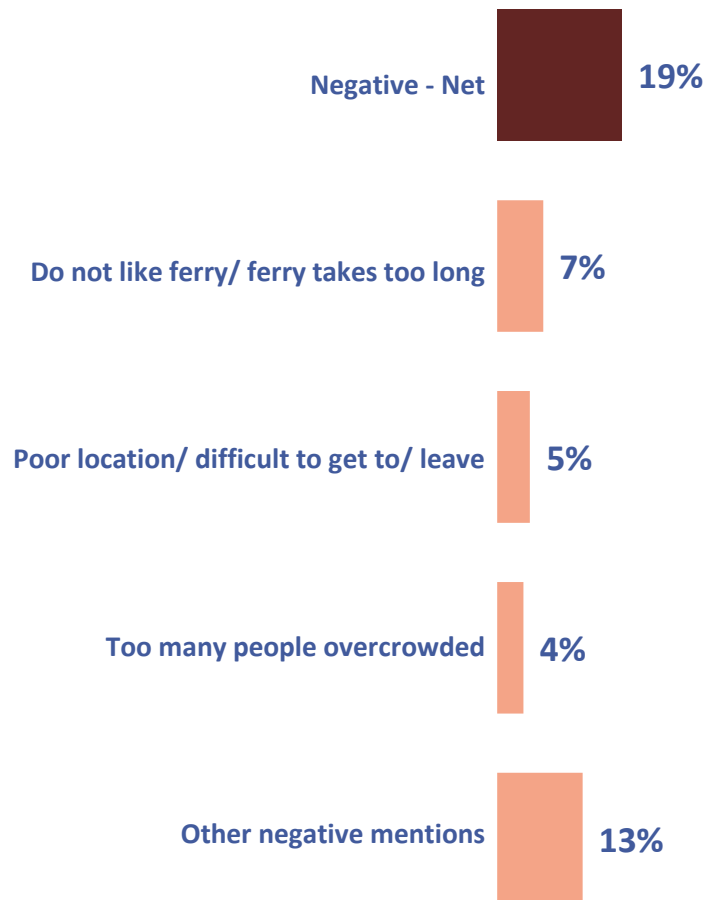
## 2013 – Positive Experience

**Positive – 84%**  
**Convenience – 72%**  
**Quick – 37%**  
**Service – 25%**  
**Airlines – 10%**  
**Miscellaneous – 39%**

Mentions smaller than 2% are not shown.

# Comments about Negative Experience

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



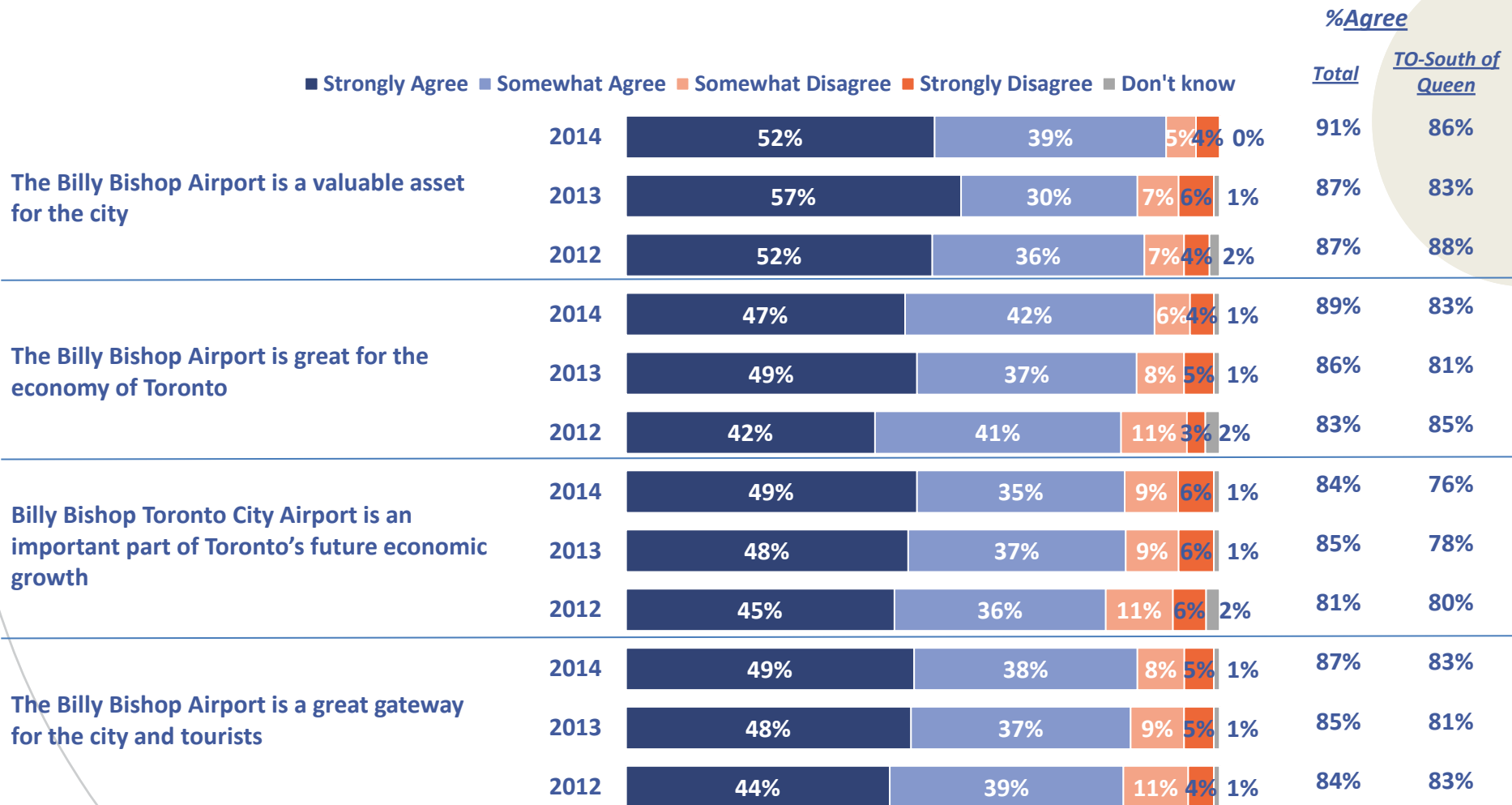
## 2013 – Negative Experience

Negative – 17%  
 Poor location – 8%  
 Do not like ferry - 5%  
 Other negative mentions – 5%

*Mentions smaller than 2% are not shown.*

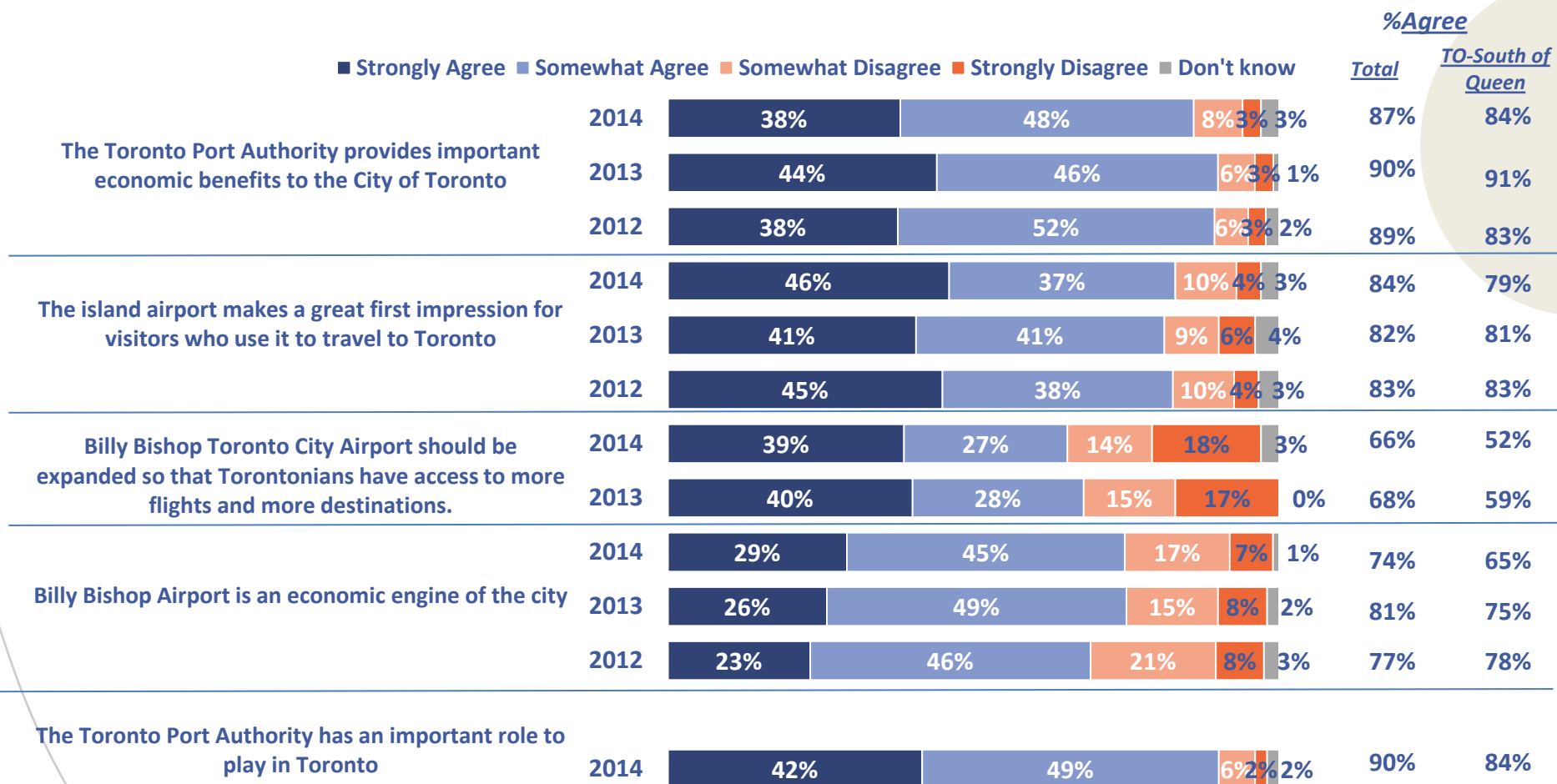
# Thoughts about TPA and Billy Bishop Airport

- More residents city-wide (91%, up 4 points), including those living South of Queen St. (86%, up 3 points) believe the Billy Bishop Airport is a valuable asset to the city compared to last year. Sentiment about the airport being great for the city's economy (89%, up 3 points) also continues to be on the rise.



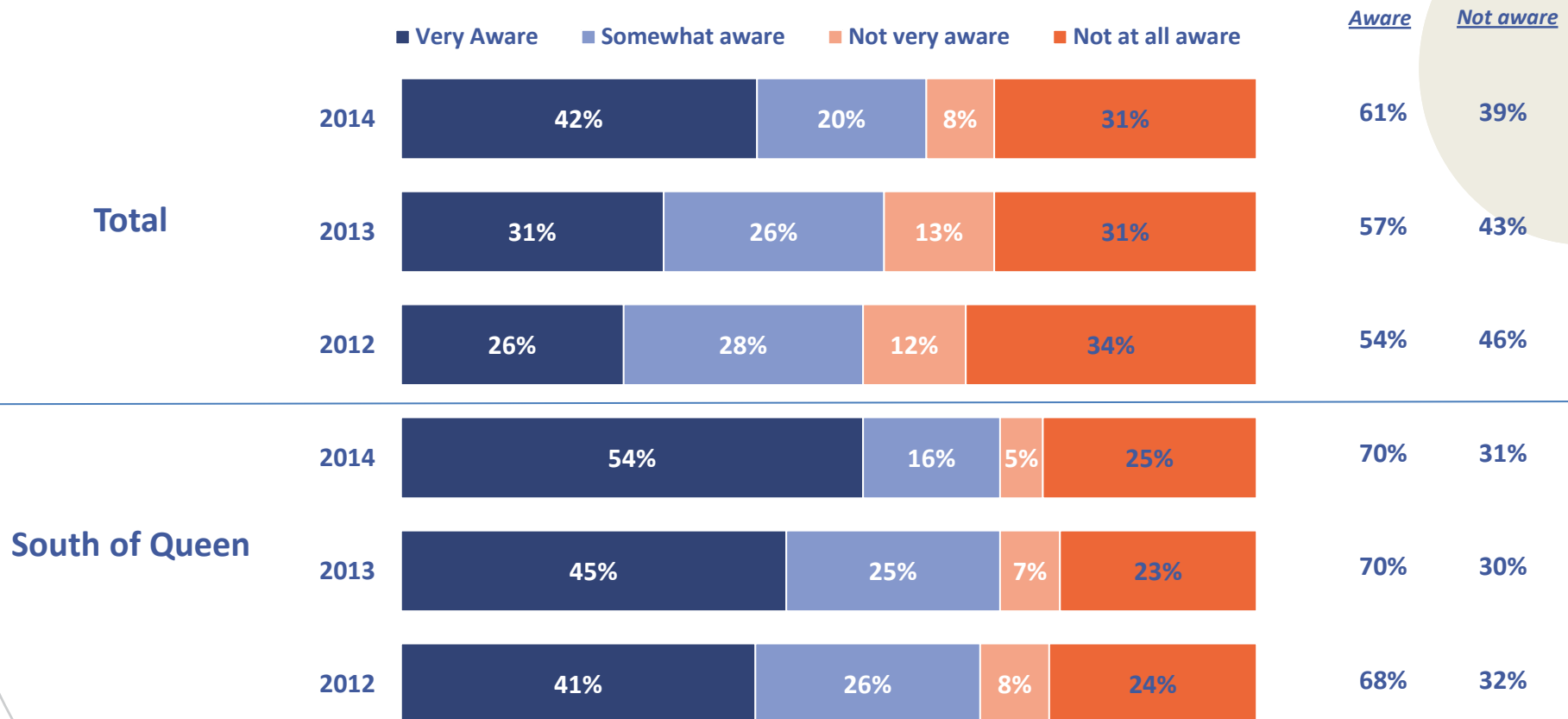
# Thoughts about TPA and Billy Bishop Airport

- More South of Queen residents believe that the TPA provides important economic benefits for the city (84%, up 5 points), and that the BBTCA is an economic engine of the city (65%, up 10 points). Nine in ten (90%), including four in five (84%) living South of Queen St. believe the TPA has an important role to play in Toronto.



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

- While awareness of pedestrian tunnel construction among those living close to the waterfront is consistent (70%, no change), awareness among Torontonians overall is up 4 points (to 61% aware).

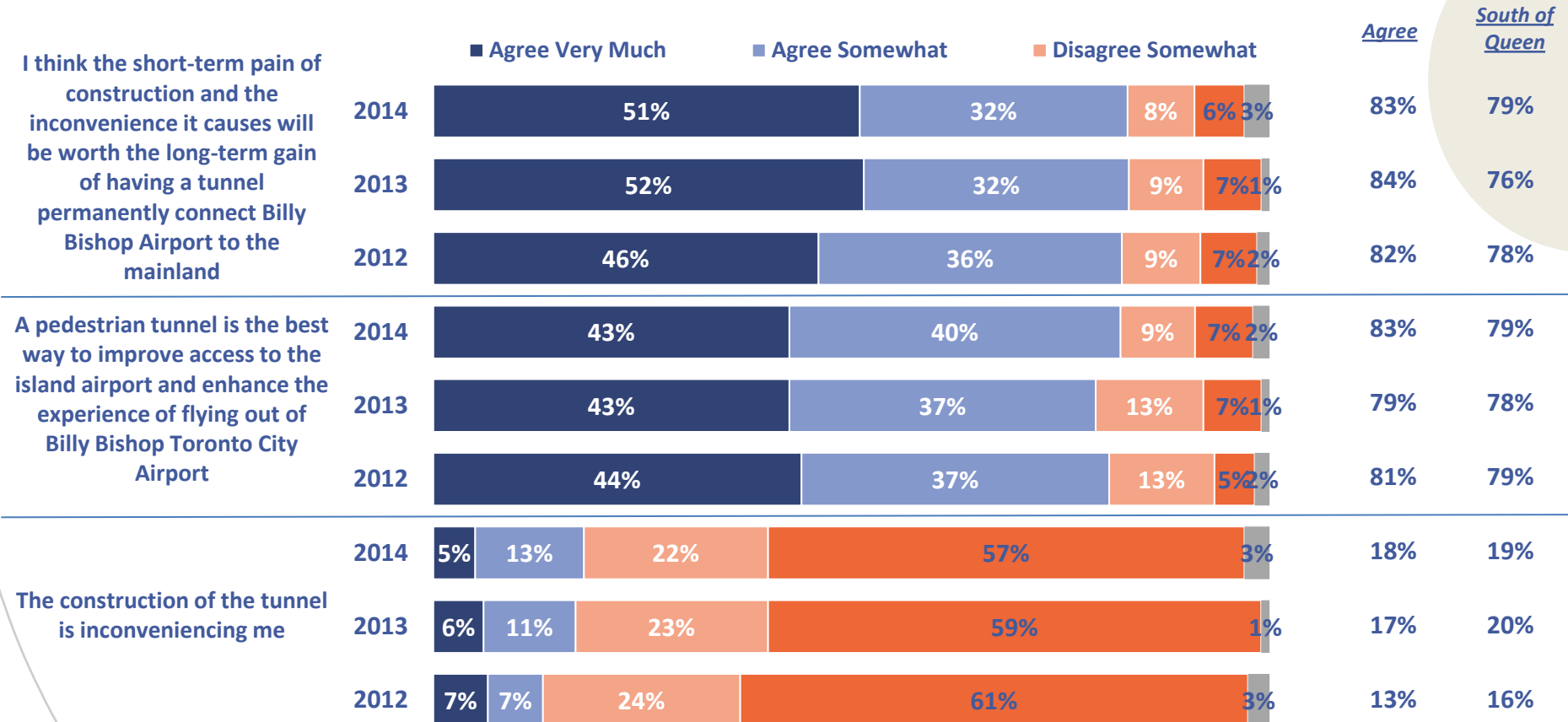


Q: As you may know, access to the Billy Bishop Toronto City Airport is by way of a short ferry ride across a distance of 400 feet (or 121 metres). An under-water pedestrian tunnel is currently being built to link the island to the mainland. Before today, to what extent are you aware of this construction?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

Base: All Respondents 2014 n=700

# Thoughts about Pedestrian Tunnel

- Attitudes towards the pedestrian tunnel are consistent across the last three years, although more residents living downtown South of Queen think the short-term pain is worth the long-term gain of having a permanent connection between BBTCA and the mainland (79%, up 3 points).

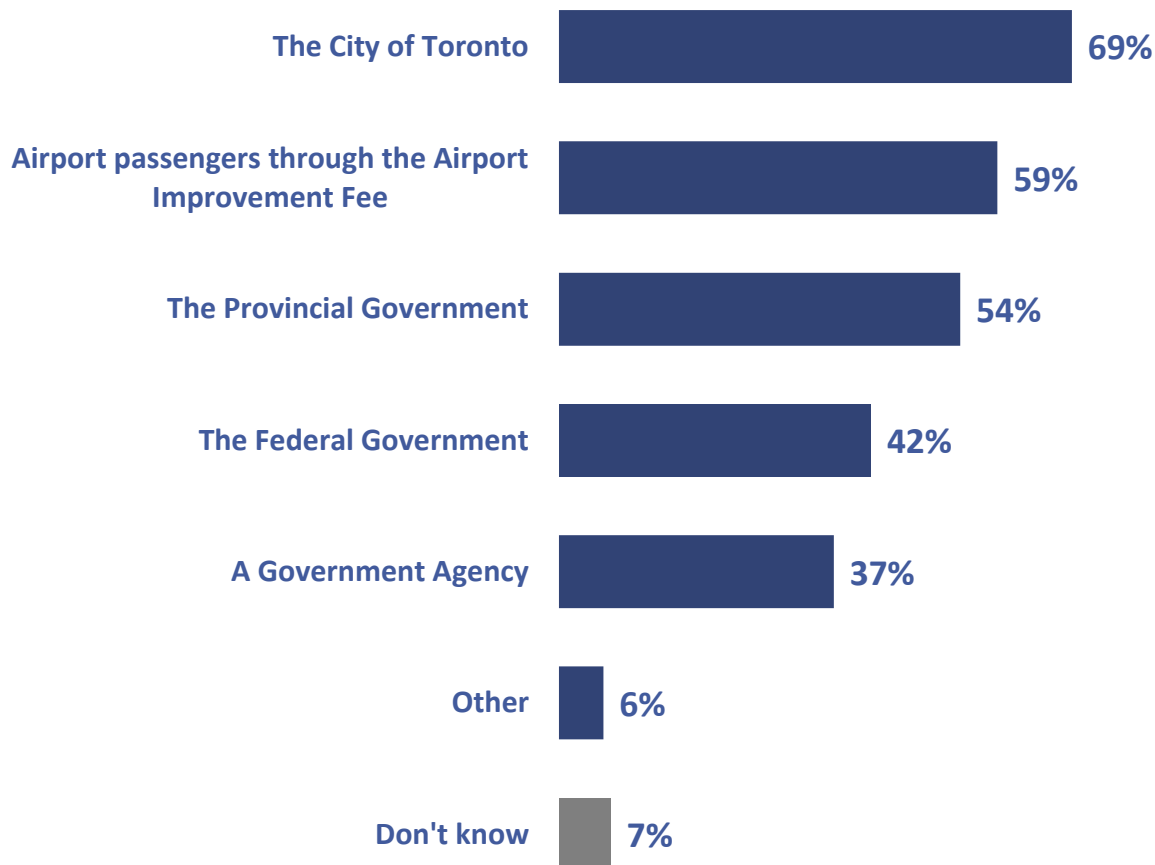


Q: I'd like to read you some statements about the pedestrian tunnel. Please tell me whether you agree very much, agree somewhat, disagree somewhat or disagree very much.

Base: All Respondents 2014 n=700

# Who is Paying for Tunnel Construction

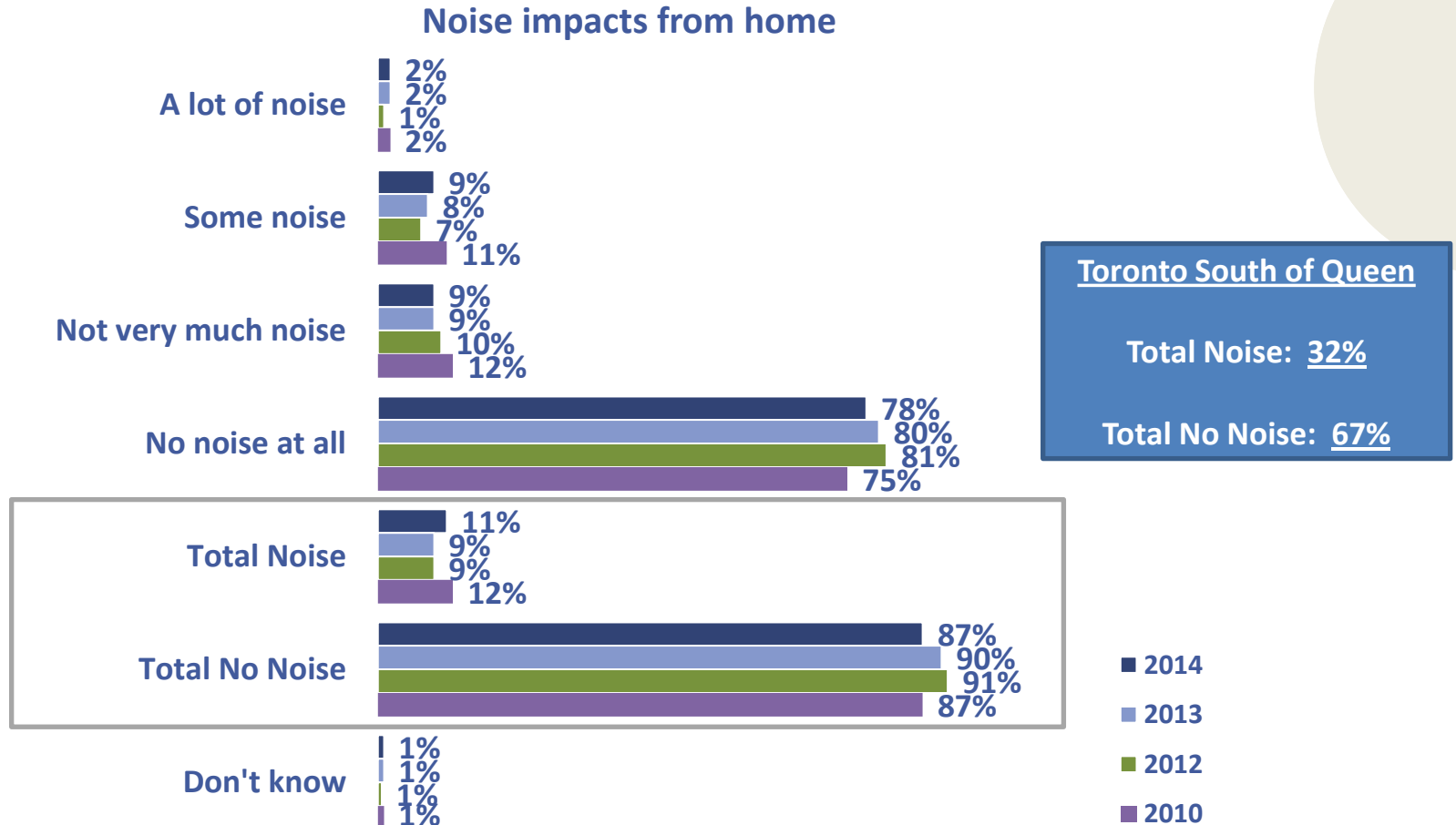
- Majority believes that the City (69%) passengers through fees (59%), and the provincial government (54%) are the major contributors to funding the pedestrian tunnel.





# Noise Issues Associated with the Airplanes

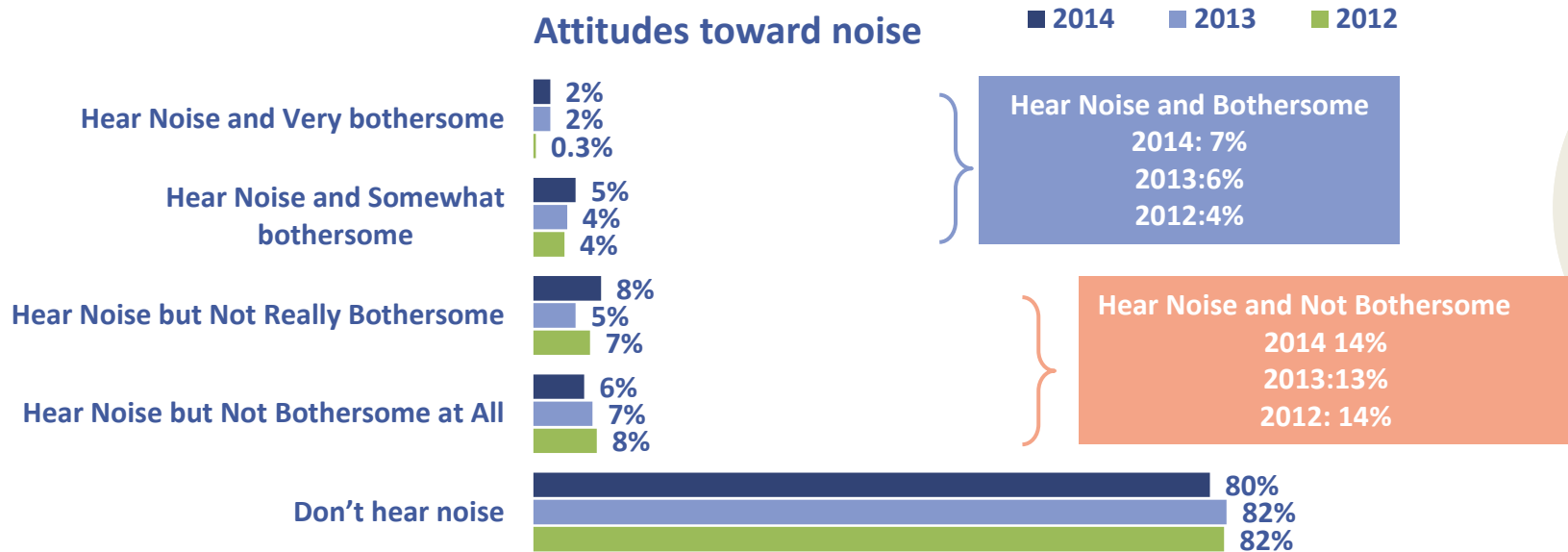
- The total proportion of Torontonians who hear noise associated with airplanes that takeoff or land at BBTCA has slightly increased to 11% (up 2 points).



# Hear Noise and are Bothered

- One in ten (7%, up 2 points) of Toronto's population hear noise from BBTCA and is bothered by it, while one in four (23%) living south of Queen are bothered by this noise.

## Attitudes toward noise

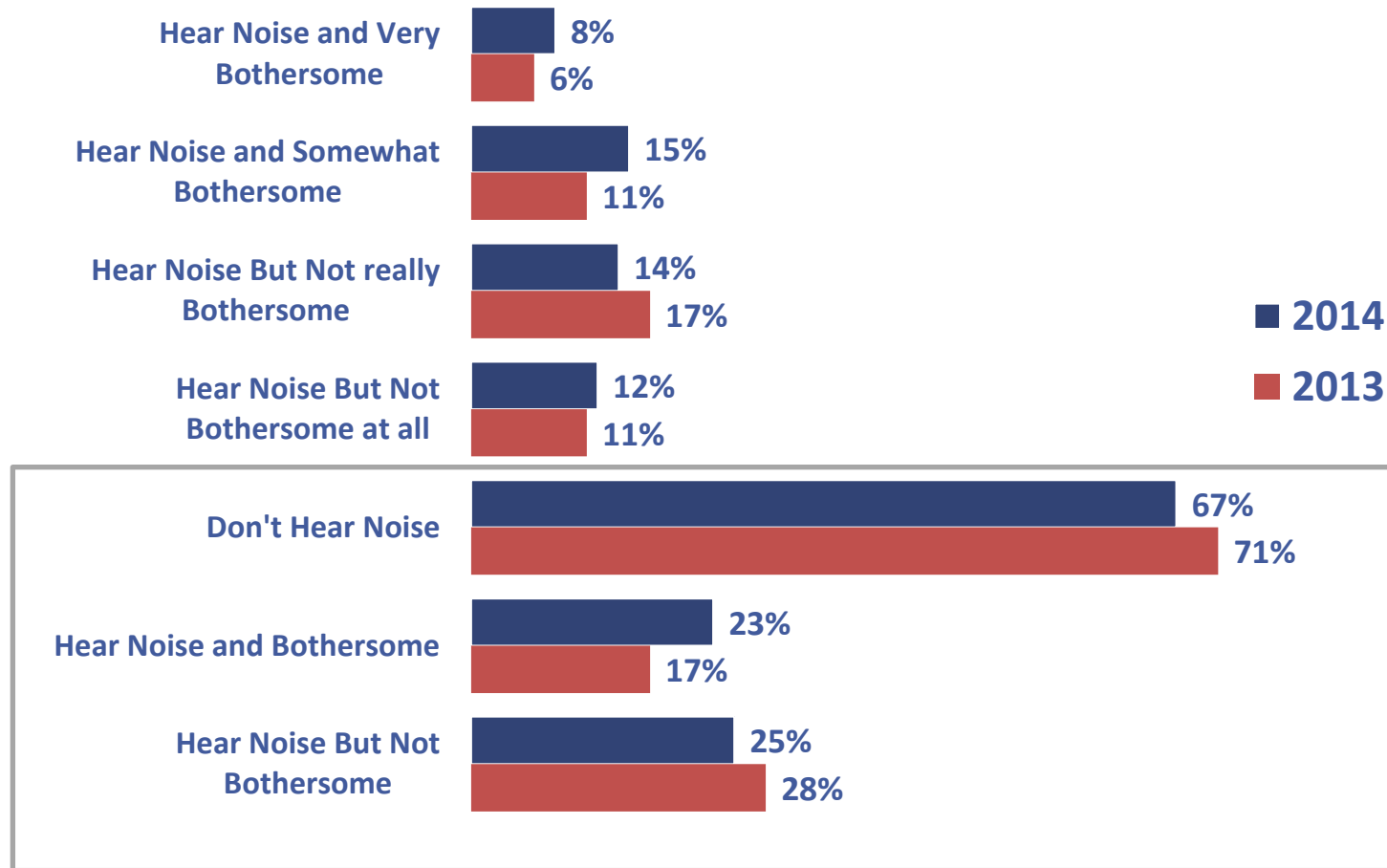


	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
Base	(n=700)	(n=75)	(n=75)	(n=75)	(n=75)	(n=300)	(n=100)
Hear noise and very bothersome	2%	2%	-	3%	2%	8%	1%
Hear noise and Somewhat bothersome	5%	3%	4%	2%	5%	15%	5%
Hear Noise and Total Bothersome	7%	5%	4%	5%	8%	23%	6%

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

## South of Queen – Hear Airplane Noise and are Bothered by It

■ Toronto residents living South of Queen are equally as likely to hear noise associated with airplanes from BBTCA and not be bothered by it (25%, down 3 points) as to hear noise and be bothered (23% points, up 6 ), while two in three (67%, down 4 points) don't hear anything at all. The proportion that hears noise and is bothered is up over last year (6 points).

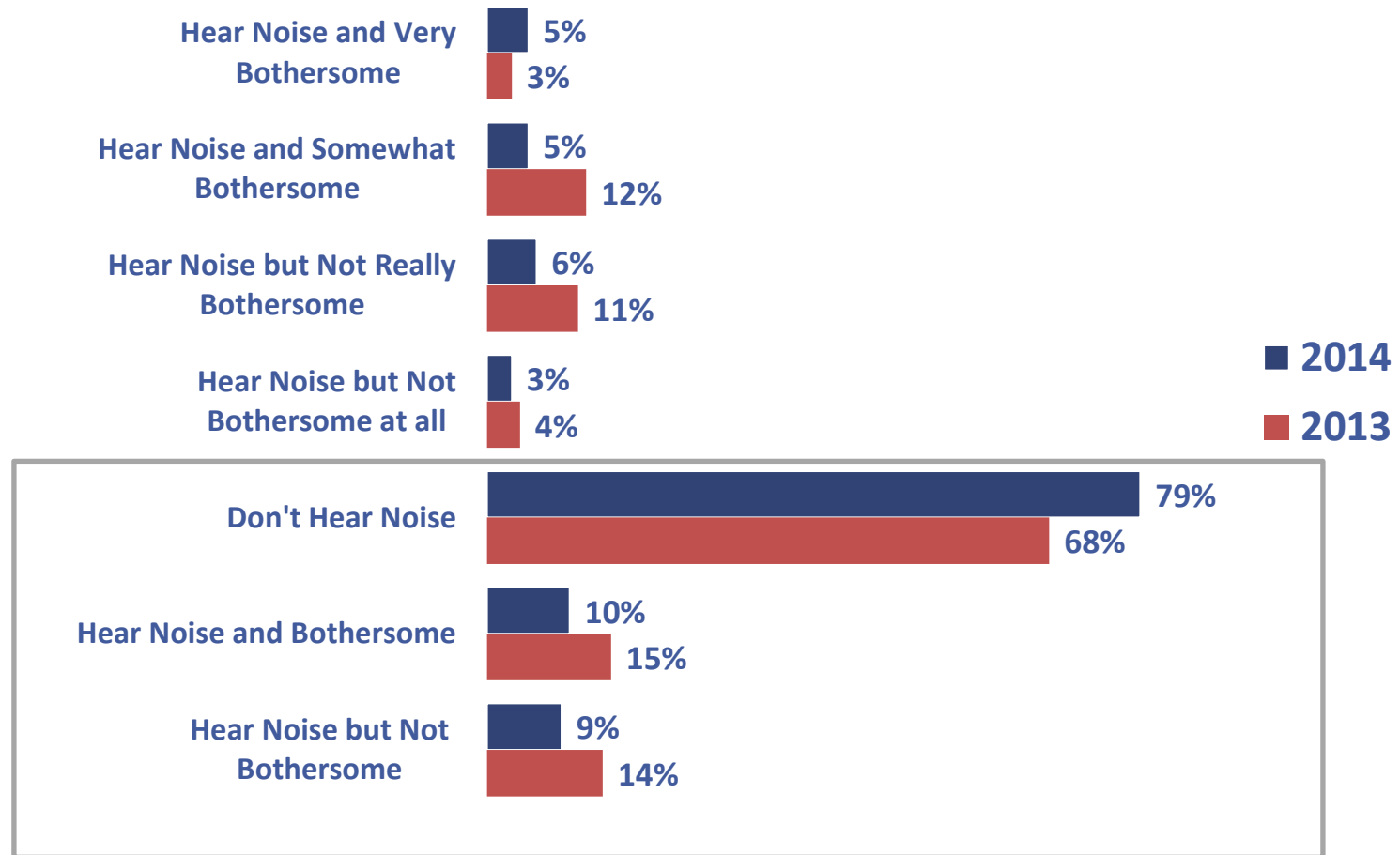


Q: And, overall, would you say that this sound or noise is very bothersome, somewhat bothersome, not really bothersome or not bothersome at all?

Base: South of Queen =300

## South of Queen – Hear Traffic Noise and are Bothered by It

▪ Just one in ten (10%, down 5 points) Toronto residents living south of Queen St. hear automobile traffic directly linked to airport activity and are bothered by it, while eight in ten (79%) don't hear any traffic noise at all.



Q: 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?

Q: 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?

Base: South of Queen =300

# 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 (60%, no change) versus about two in five (37%, no change) who oppose.

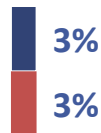
Support the use of jet aircraft at Billy Bishop Toronto City Airport provided the jets make no more noise than the current turboprops



Oppose the use of jet aircraft at Billy Bishop Toronto City Airport under any circumstances



Don't Know



■ 2014

■ 2013

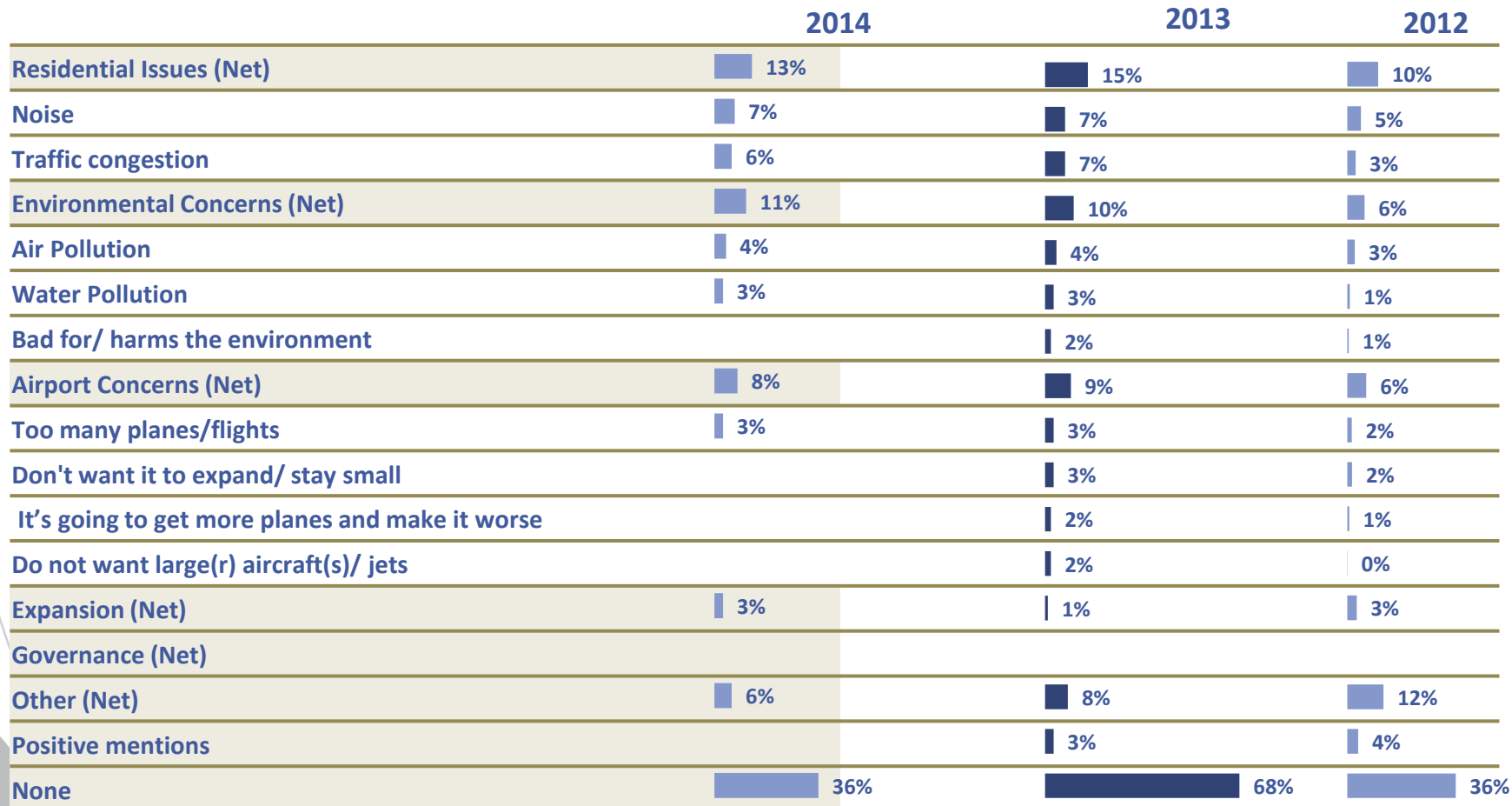
	Total	East York/ York	North York	Scarborough	Etobicoke	Toronto - South of Queen St.	Toronto - North of Queen St.
Base	(n=700)	(n=75)	(n=75)	(n=75)	(n=75)	(n=300)	(n=100)
Support the use of jet aircraft at Billy Bishop Toronto City Airport provided the jets make no more noise than the current turboprops	60%	57%	53%	65%	70%	48%	61%
Oppose the use of jet aircraft at Billy Bishop Toronto City Airport under any circumstances	37%	39%	44%	31%	29%	50%	37%
Don't Know	3%	3%	3%	4%	2%	3%	3%

Q: 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 = 700

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

- Residential concerns, such as noise and traffic congestion, are down slightly from last year (15% to 13%). Those with no concerns at all mirrors 2012 results and is down noticeably from last year.



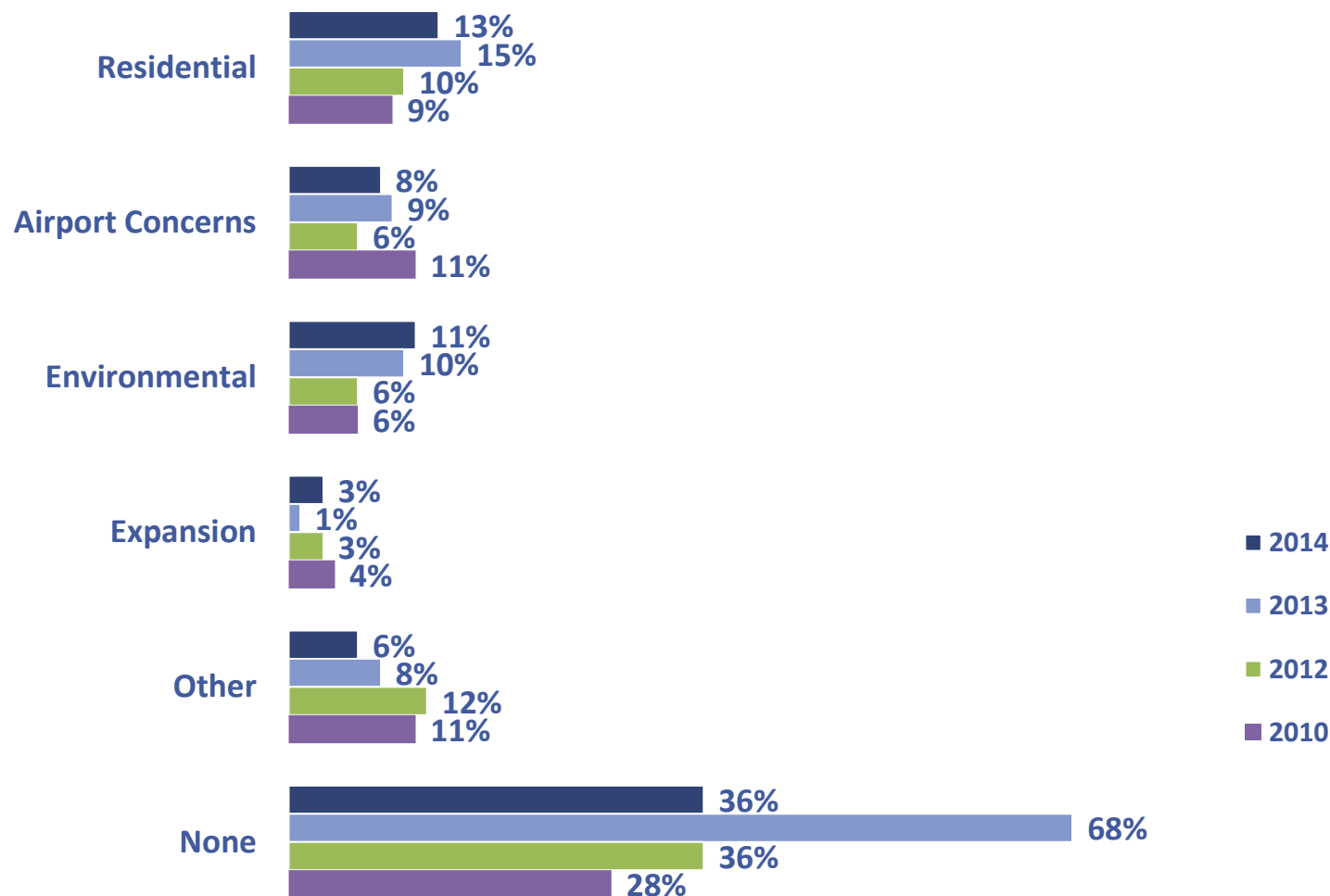
Mentions smaller than 2% are not shown.

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 2014 n=700

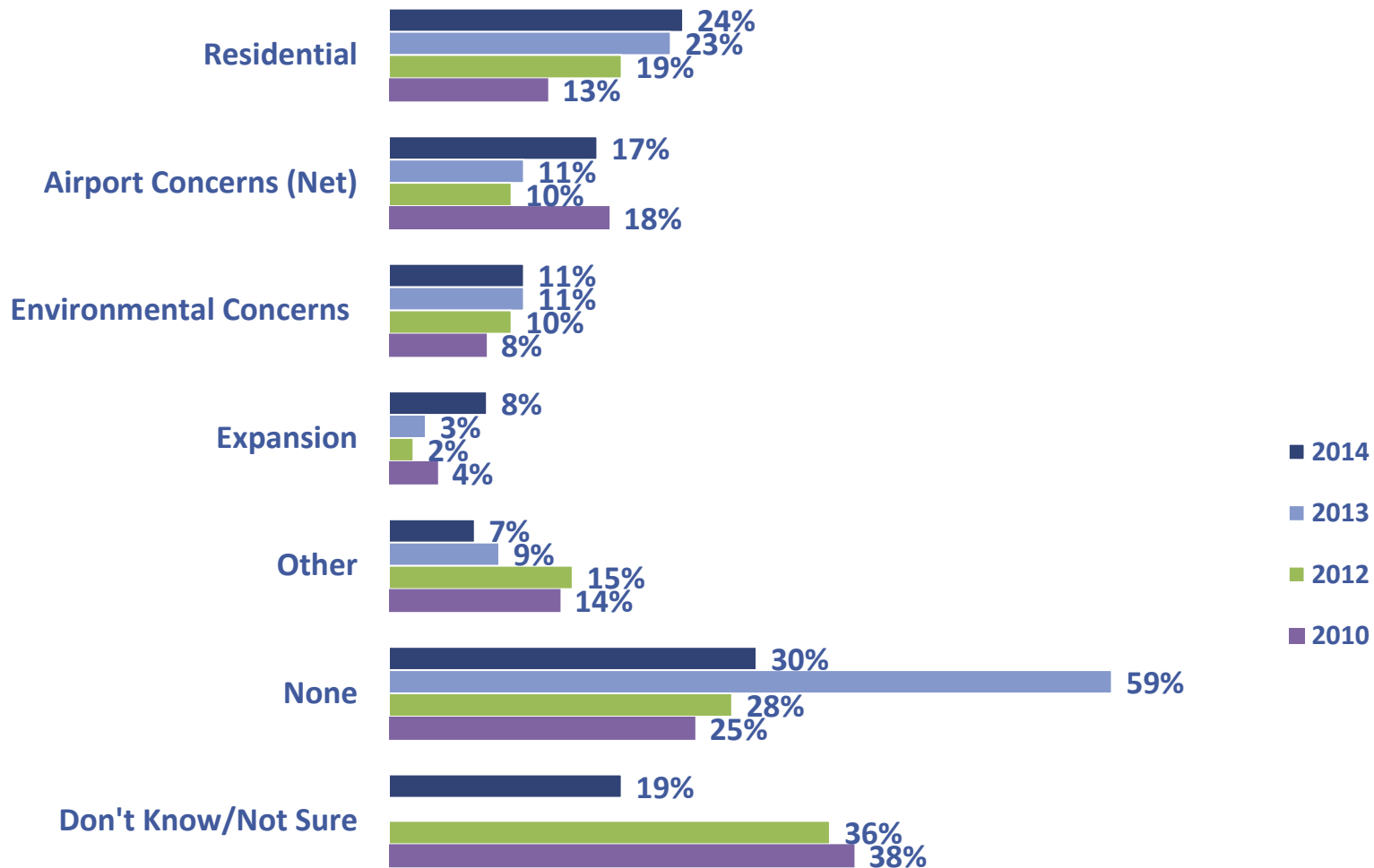
# Concern Tracking



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 2014 n=700

## Concern Tracking – South of Queen



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 2014 n=700



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