



PORTS TORONTO

PUBLIC OPINION SURVEY

A QUANTITATIVE SURVEY
OF TORONTO RESIDENTS

FINAL REPORT | June 22, 2022

ENVIRONICS
RESEARCH

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INTRODUCTION: METHODOLOGY AND KEY INSIGHTS

The objective of this study is to measure client and resident satisfaction with and usage of the Billy Bishop Toronto City Airport.

To support this objective, PortsToronto commissioned Environics Research to conduct a public satisfaction survey of Torontonians to better understand their familiarity and perceptions of the airport. Additionally, the survey collects opinions on how experiences with the airport can be improved, and on proposed measures to reduce environmental impact.

RESEARCH METHODS

The following report is based on results from a Spring 2022 public opinion telephone survey that gauges the Toronto residents' attitudes toward and experiences with PortsToronto's Billy Bishop Toronto City Airport (BBTCA).

This 15-minute telephone (CATI) survey was conducted from May 5th - June 8th, 2022, among a random and representative sample of N=1,225 residents aged 18 years and older – including an oversample of N=336 residents living along the Waterfront region. In this report, the Waterfront region is defined as the body of water-facing FSA regions in the city spanning from Etobicoke to Scarborough (see slide no. 7 for map outlining this region). The margin of error for this survey is \pm 2.8%, 19 times out of 20.

As a continuation of public satisfaction surveys for PortsToronto executed by Environics Research, the 2022 survey was structured to highlight comparisons of responses from previous years' questions, where applicable.

Results are expressed as percentages unless otherwise noted. Results may not add to 100% due to rounding or multiple responses. Net results cited in text may not exactly match individual results shown in charts due to rounding.

RESEARCH METHODS

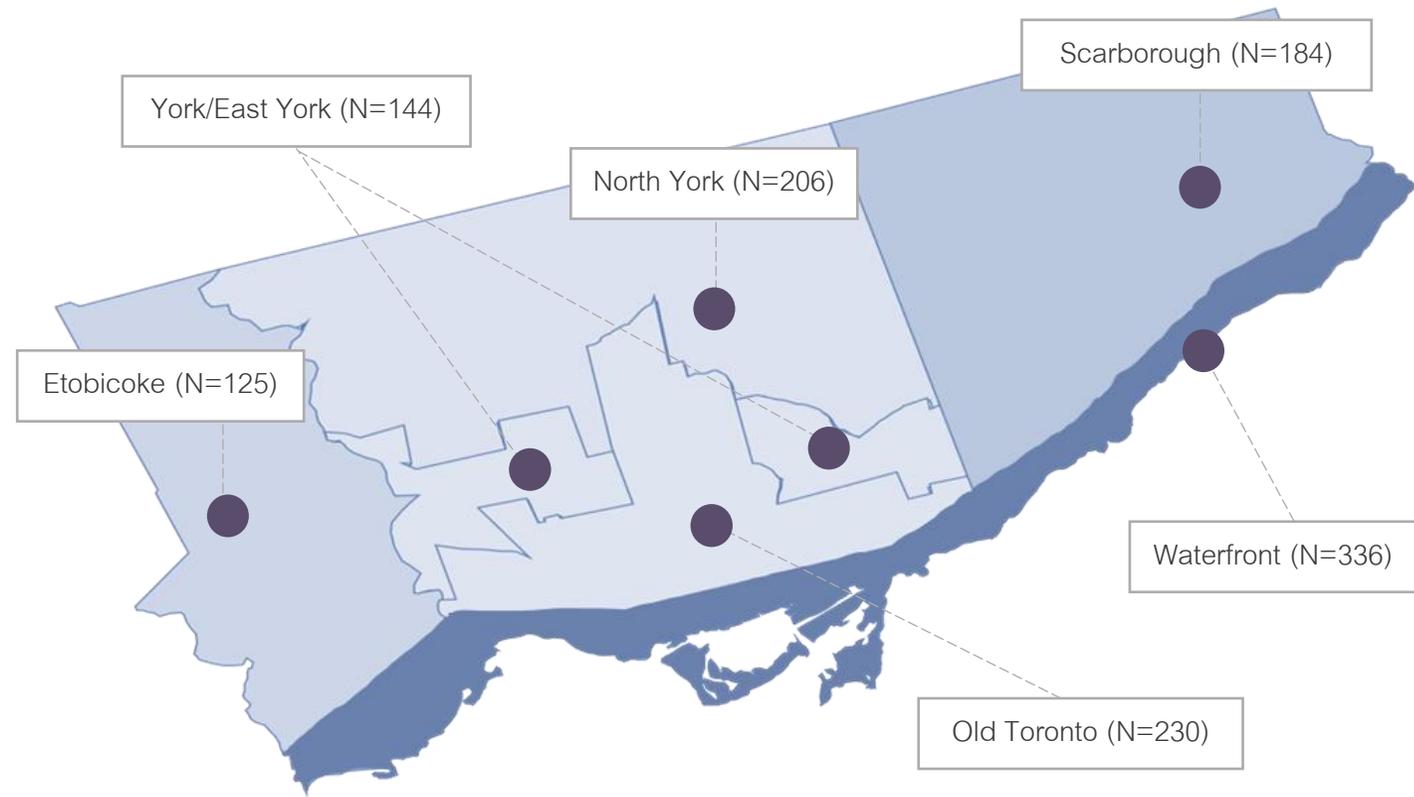
The following table outlines the unweighted and weighted completes by region, along with the corresponding margin of error.

	Total	Waterfront*	Old Toronto	North York	Scarborough	Etobicoke	York/ East York
N (unweighted)	1,225	336	230	206	184	125	144
N (weighted)	1,225	245	196	331	196	123	135
Proportion of total sample (weighted)	100%	20%	16%	27%	16%	10%	11%
Margin of error (%, 19 times out of 20)	± 2.8%	± 5.3%	± 6.4%	± 6.8%	± 7.2%	± 8.7%	± 8.1%

*Waterfront is defined as the water-facing FSA regions in the city from Etobicoke to Scarborough.

RESEARCH METHODS

The map below shows the regions and their corresponding unweighted sample sizes of the survey. There is an oversample of the Waterfront region (akin to previous iterations of the PortsToronto Public Opinion Survey) of N=336 residents – providing a double-count of interviews for this region due to its proximity to Billy Bishop Toronto City Airport.



KEY INSIGHTS

- 1 Approximately two in three Toronto residents are familiar with the Billy Bishop Toronto City Airport.** Overall familiarity with the airport has dropped ten percentage points since the 2018 survey (from 73% to 63%); however, current levels of familiarity are in line with 2016 survey results showing a slight fluctuation in familiarity over time.
- 2 Two in five residents have flown from BBTCA in the past.** Those who have previously flown from the BBTCA are more likely to include residents of Old Toronto, York/East York, and the Waterfront, and as well as those who fall within the age group of 35-49.
- 3 Seven in ten Torontonians express favourable opinions of BBTCA, with York/East York and Old Toronto residents most likely to express favourable opinions.** Men, as well as those with a household income of >\$100K are also more likely to share these sentiments. Favourability is linked to the airport's overall convenience in location.
- 4 Of those who have previously flown from BBTCA, an overwhelming majority say they had a positive experience with the airport.** Over nine in ten residents who have flown from Billy Bishop report a positive experience, with six in ten citing the Airport is "convenient and easy to access."
- 5 The top reasons residents have not flown from BBTCA include the inability to access certain destinations, not being a frequent flyer, and believing other airports provide more convenience.** These have remained the top reasons residents do not fly with BBTCA since the 2016 survey.

KEY INSIGHTS

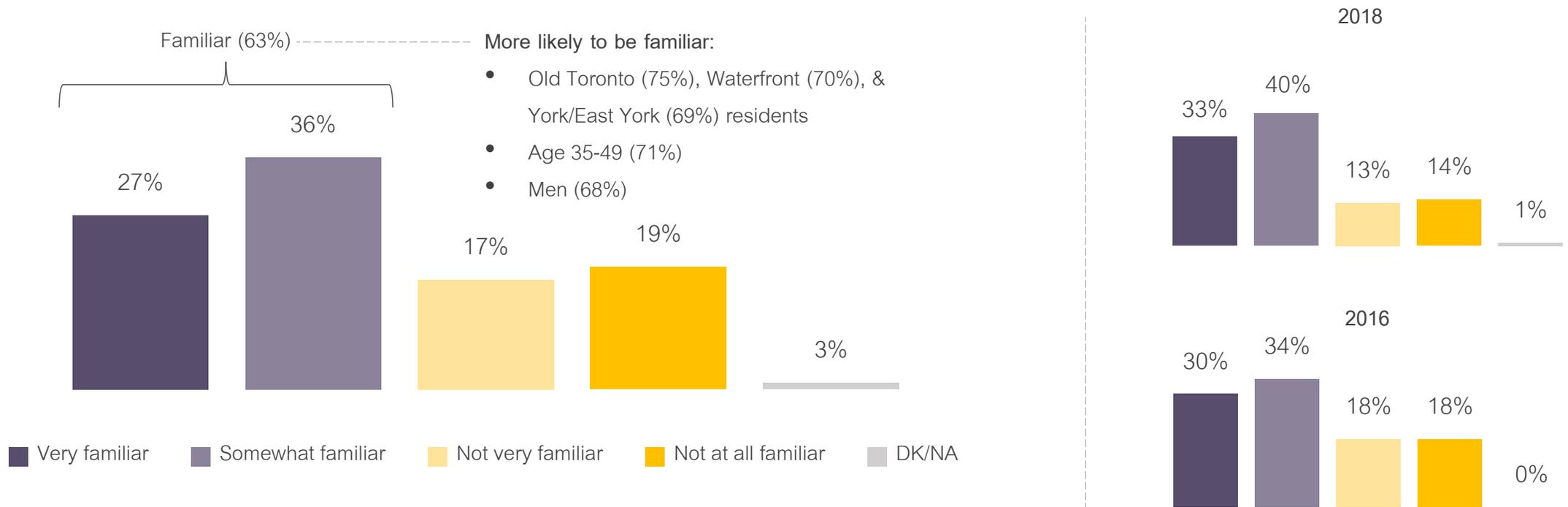
- 6 Consistent with previous years, users of Billy Bishop Airport primarily report flying for leisure, rather than for business.** While seven in ten say they fly from BBTCA for leisure trips, three in ten say they fly for business. Residents who fly from BBTCA also articulate that their post-pandemic travel from the airport will likely be for personal/pleasure trips.
- 7 A plurality of Torontonians agree with statements that the BBTCA's location "makes sense," and that the airport is a valuable asset to the city for business/the economy, tourism and healthcare.** A majority of residents (71%-87%) agree with statements provided in the survey that speak to the airport's positive impact on the city's ability to provide jobs, to facilitate business both domestically and abroad, to boost tourism, and to provide support for health care. Agreement with these impact statements coincide with the largely favourable opinions of BBTCA found earlier in the survey.
- 8 Toronto residents say the BBTCA's environmental impact is important to them, with widespread support for 'green' initiatives.** Nearly nine in ten Toronto residents (86%) articulate it is important to them that measures are taken by the Billy Bishop Airport to reduce environmental impact, with the same amount in favour of the introduction of new aircrafts that are quieter and better for the environment.

IMPRESSIONS & USAGE OF BILLY BISHOP AIRPORT

Ports Toronto | Familiarity with BBTCA

Approximately two-thirds of Toronto residents say they are familiar with the Billy Bishop Airport, with one-quarter being “very” familiar. Residents of Old Toronto, Waterfront, and York/East York are more likely to express familiarity over other regions, as well as residents aged 35-49, and men. The decline in familiarity may, in part, be attributed to travel limitations experienced during the COVID-19 pandemic.

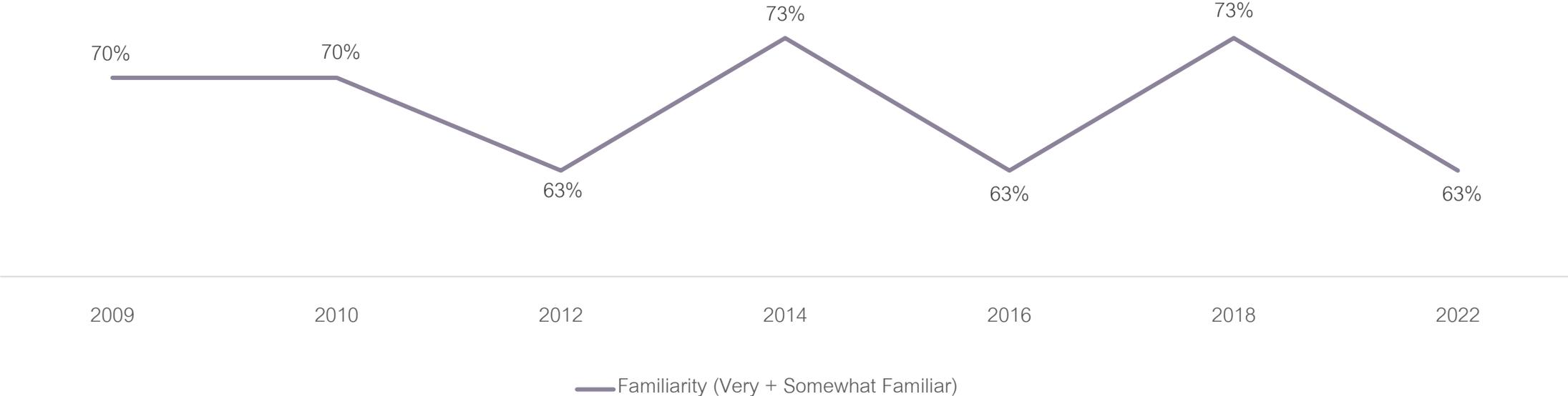
Q1. How familiar are you with the Billy Bishop Toronto City Airport, which is located on Toronto Island near downtown? Are you ... (N=1,225)



Ports Toronto | Familiarity with BBTCA: Overview

Despite a marginal decline in familiarity with the Billy Bishop Airport in 2022 from 2018 (down 10 percentage points), the current level of familiarity of the Airport among residents remains similar to previous waves of the survey, namely 2012 and 2016.

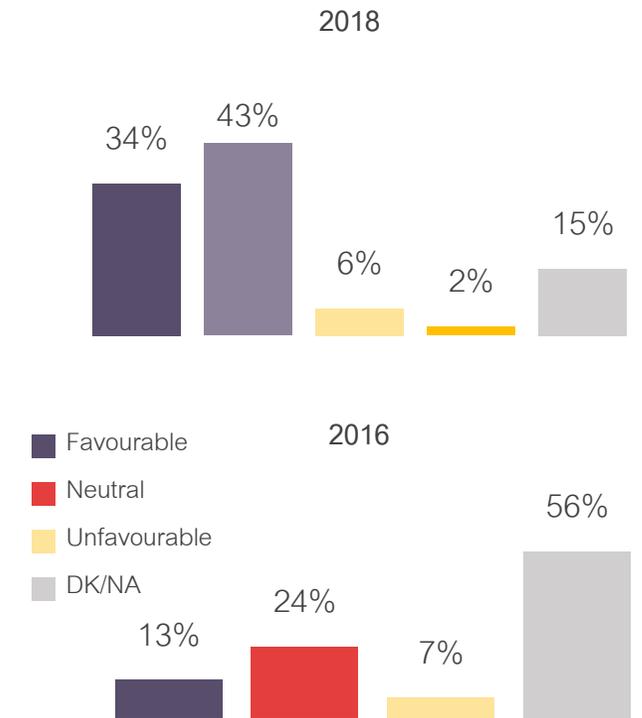
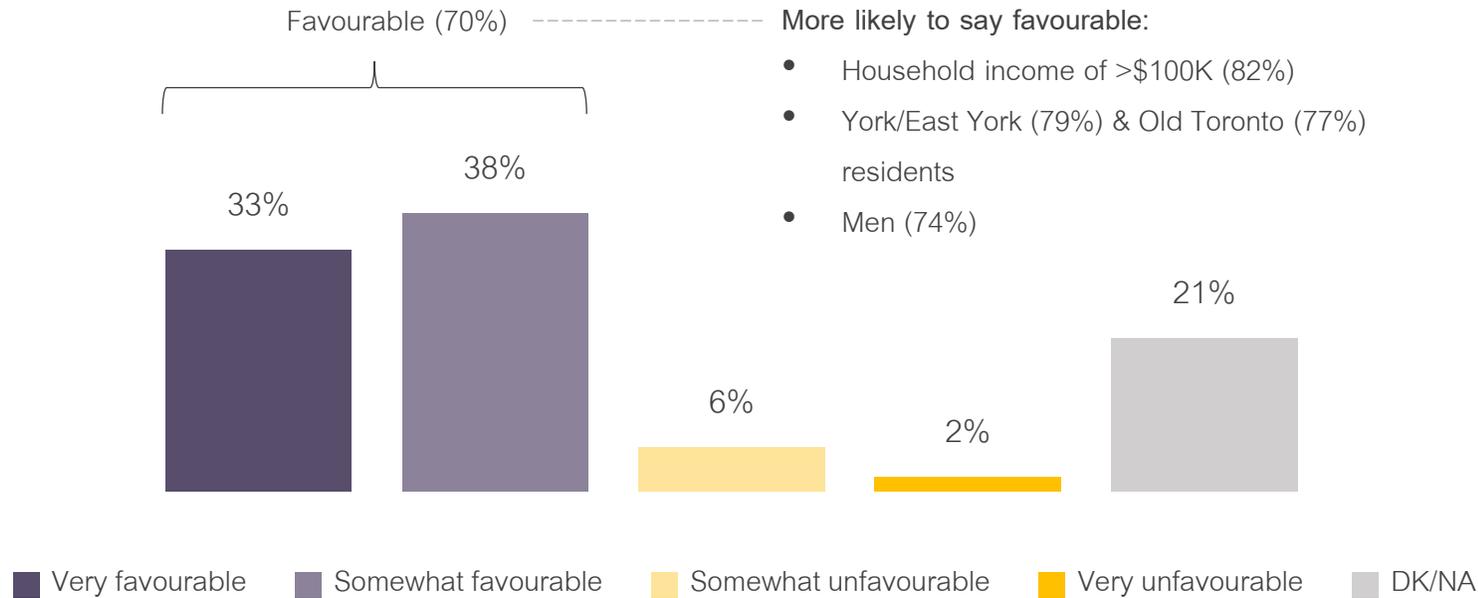
Q1. How familiar are you with the Billy Bishop Toronto City Airport, which is located on Toronto Island near downtown? Are you ...



PortsToronto | Impression of BBTCA

Seven in ten Toronto residents hold either a “very” or “somewhat” favourable opinion of the Billy Bishop Airport, with residents of York/East York and Old Toronto, men, as well as those with a household income of over \$100K being more likely to express favourability. While there is a decline in overall favourability from the 2018, there is a significant jump from 2016.

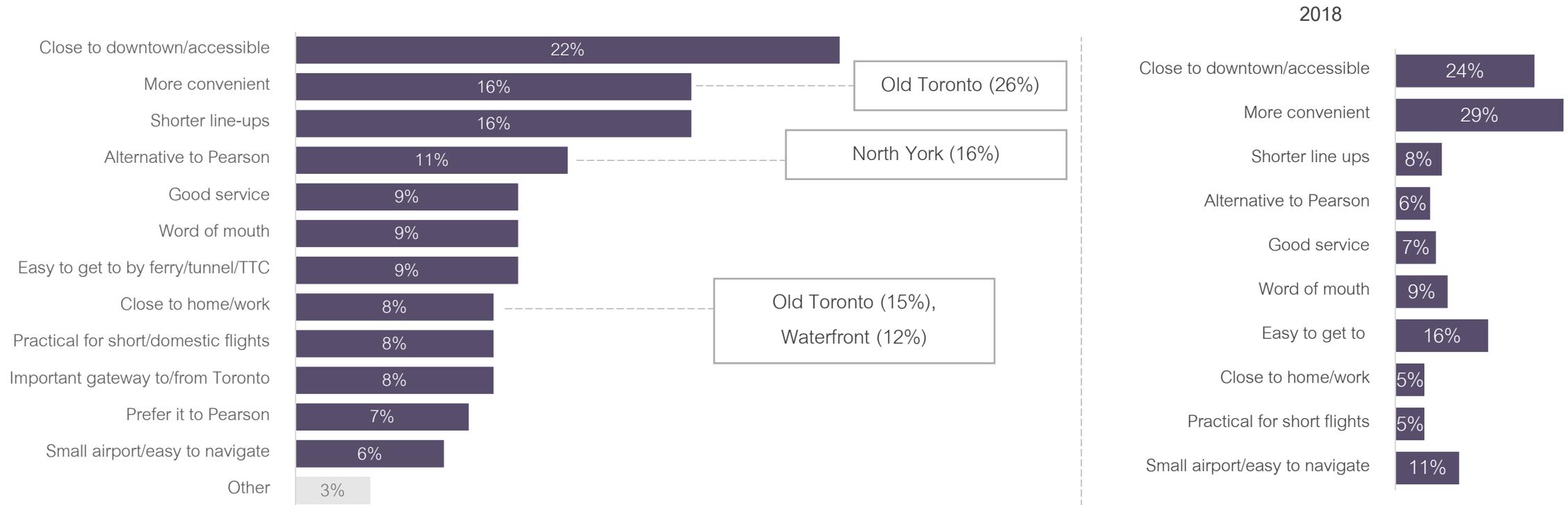
Q2. How favourable is your opinion of Billy Bishop Airport? Is it... (N=1,225)



PortsToronto | Reason for Favourable Impression

Proximity to downtown, convenience, and shorter line-ups are among the top reasons Toronto residents report a favourable opinion of the Billy Bishop Airport. Proximity and convenience are top reasons for favourability shared with the previous survey in 2018.

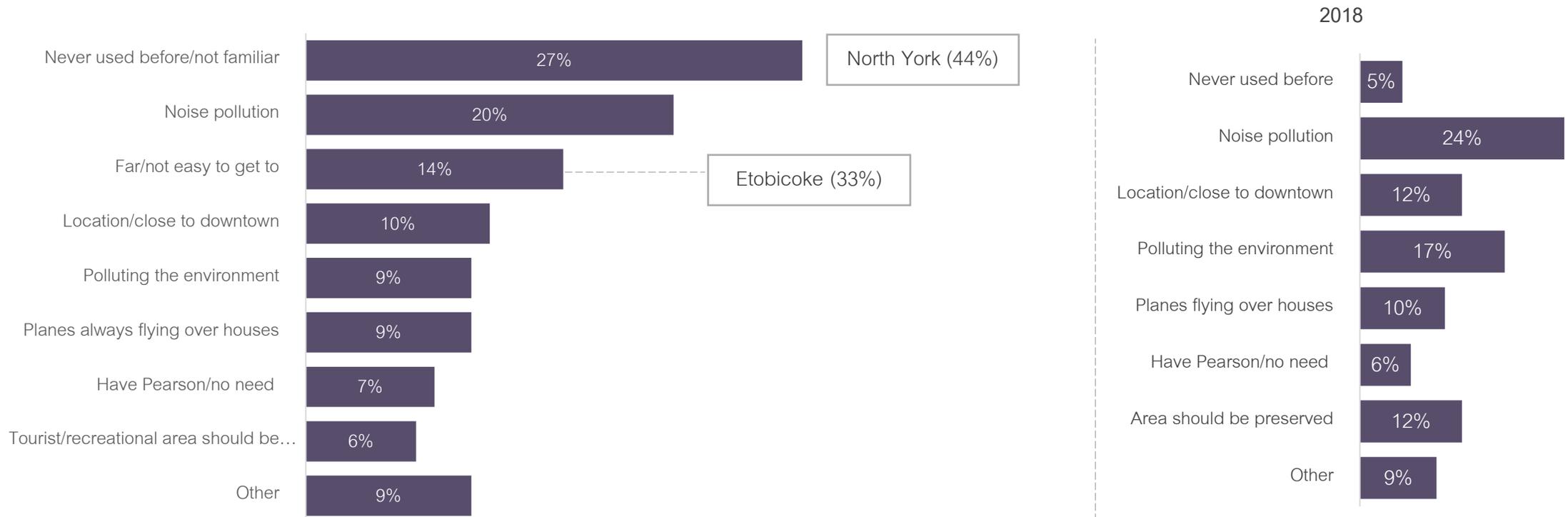
3a. What is the main reason you have a favourable impression of Billy Bishop Airport? Subsample: Those who report favourable impression with BBTCA (N=872)



PortsToronto | Reason for Unfavourable Impression

Of residents who report an unfavourable opinion of Billy Bishop Airport, one-quarter (27%) say it is due to never using the airport before/not being familiar with the airport. This is followed by two in ten who report it is due to noise pollution. Responses in this survey vary from the 2018 survey, where just 5 percent of those with an unfavourable opinion reported never using the airport before.

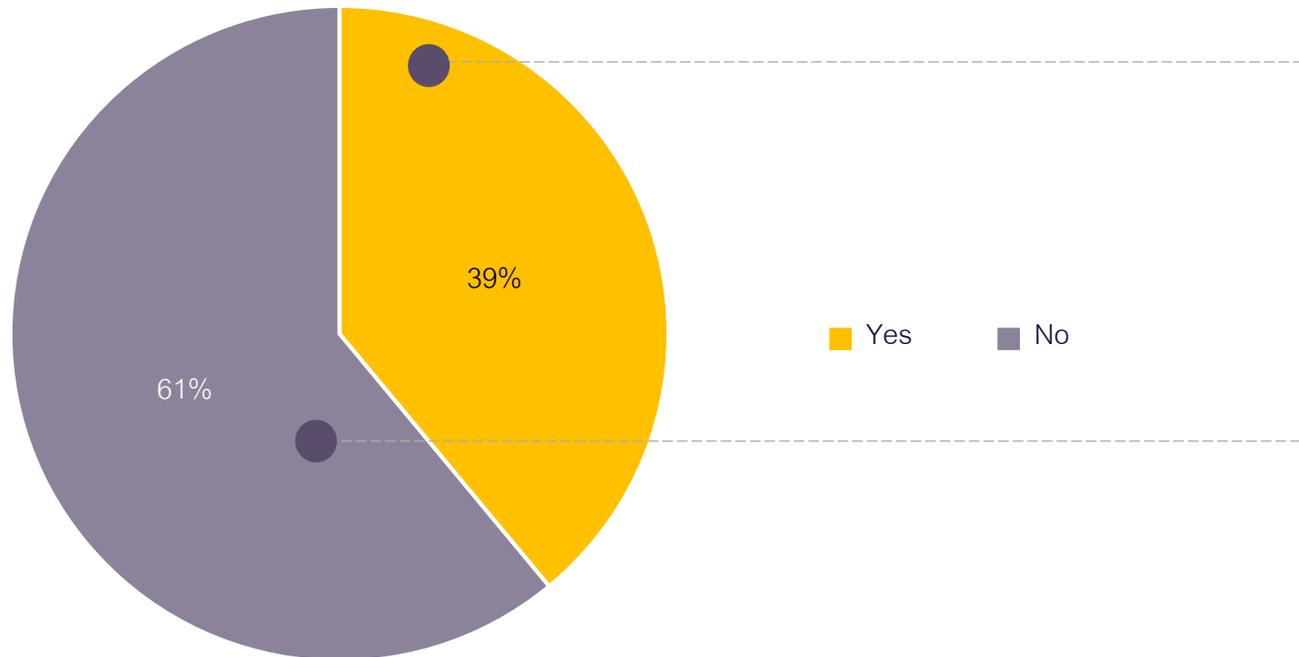
3b. What is the main reason you have an unfavourable impression of Billy Bishop Airport? Subsample: Those who report unfavourable impression with BBTCA (N=103)



PortsToronto | History with BBTCA

Two in five Torontonians say they have flown from the Billy Bishop Airport in the past. Those who have previously flown from the BBTCA are more likely to include residents of Old Toronto, York/East York, and the Waterfront regions. Additionally, those who fall within the age group of 35-49, those with a child under age 18 at home, and the 2SLGBTQ+ community are subgroups more likely to have a history with the BBTCA.

Q4. Have you flown from Billy Bishop Airport before? (N=1,225)



More likely to have flown from Billy Bishop Airport before:

- Old Toronto (61%), York/East York (48%) & Waterfront residents (47%)
- Age 35-49 (54%)
- Men (42%)
- Child <18 at home (46%)
- 2SLGBTQ+ (52%)

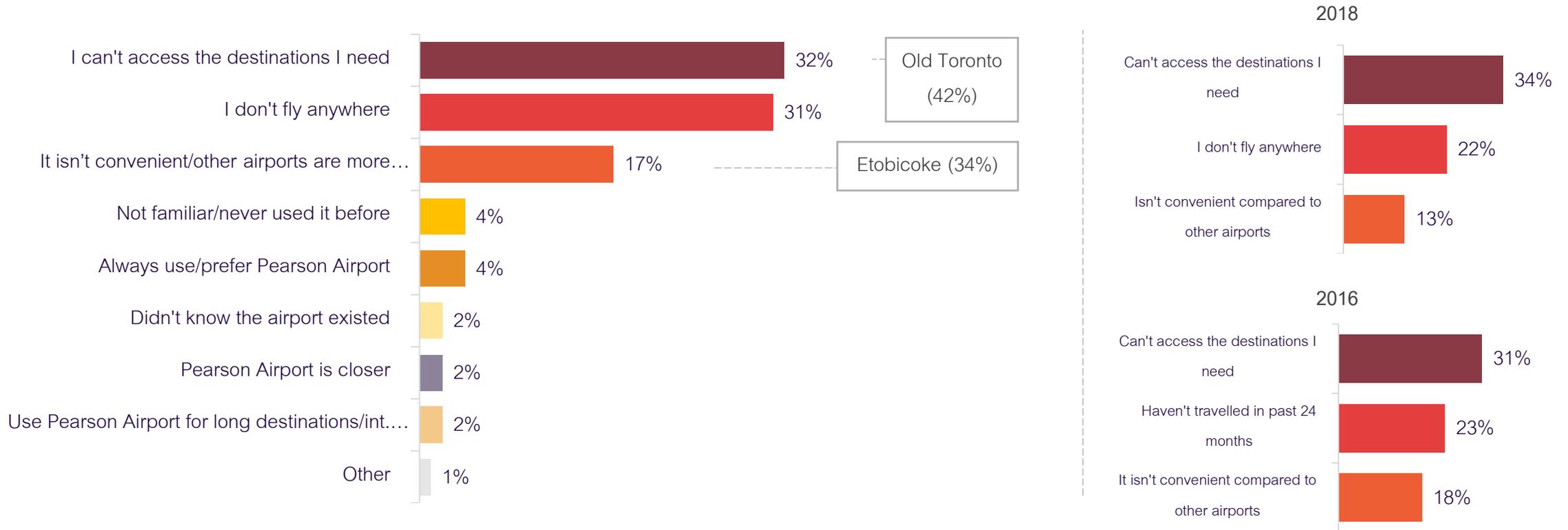
More likely to *not* have flown from Billy Bishop Airport before:

- Scarborough (79%), Etobicoke (73%) & North York residents (68%)
- Newcomers (76%)
- Black/Indigenous/POC (69%)
- Age 18-34 (68%)

PortsToronto | Reasons for Not Using BBTCA

The inability to access certain destinations is the top reason Toronto residents have not used the Billy Bishop Airport, with one in three specifying this. The top three reasons for not using the BBTCA have remained unchanged since 2016.

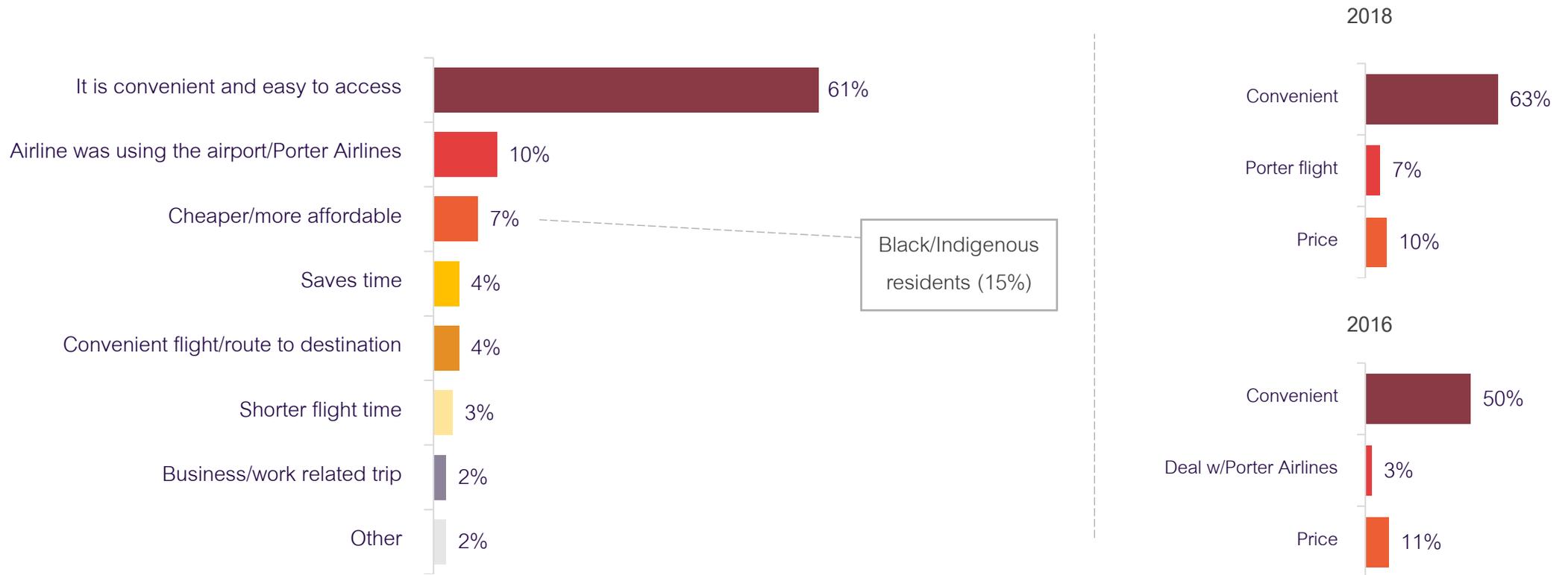
Q5. What is the main reason you have not used that airport? Subsample: Those who have never flown out of Billy Bishop Toronto City Airport. (N=719)



PortsToronto | Reasons for Using BBTCA

Three in five Toronto residents communicate the main reason they choose the BBTCA is due to its convenience. Choosing the BBTCA primarily for its convenience has been maintained by Toronto residents since the 2016 survey.

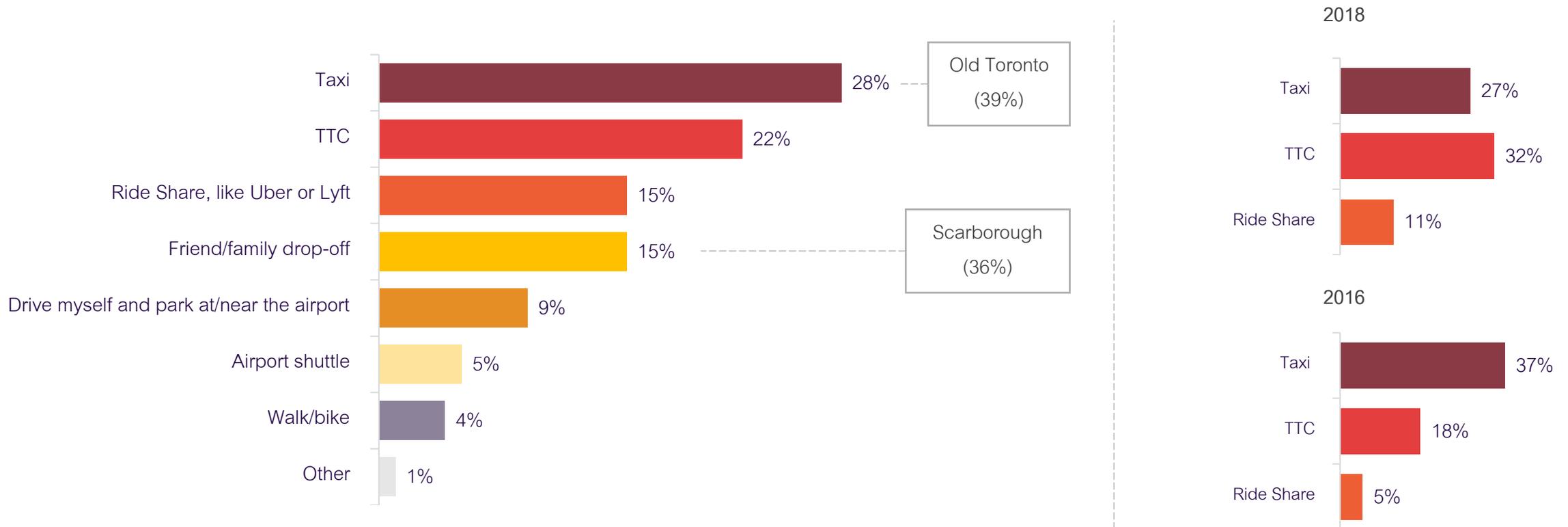
Q6. What is the main reason you choose this airport? Subsample: Those who have used Billy Bishop Toronto City Airport. (N=504)



PortsToronto | Methods of Getting to BBTCA

Approximately three in ten residents get to the Billy Bishop Airport via taxi, with those from Old Toronto being the most likely to say this. Other primary methods of transportation to the airport include the TTC, ride shares, and a family/friend drop-off. Choosing ride shares as a transportation method has increased steadily over the years, while other methods such as taxis and the TTC show little change over time.

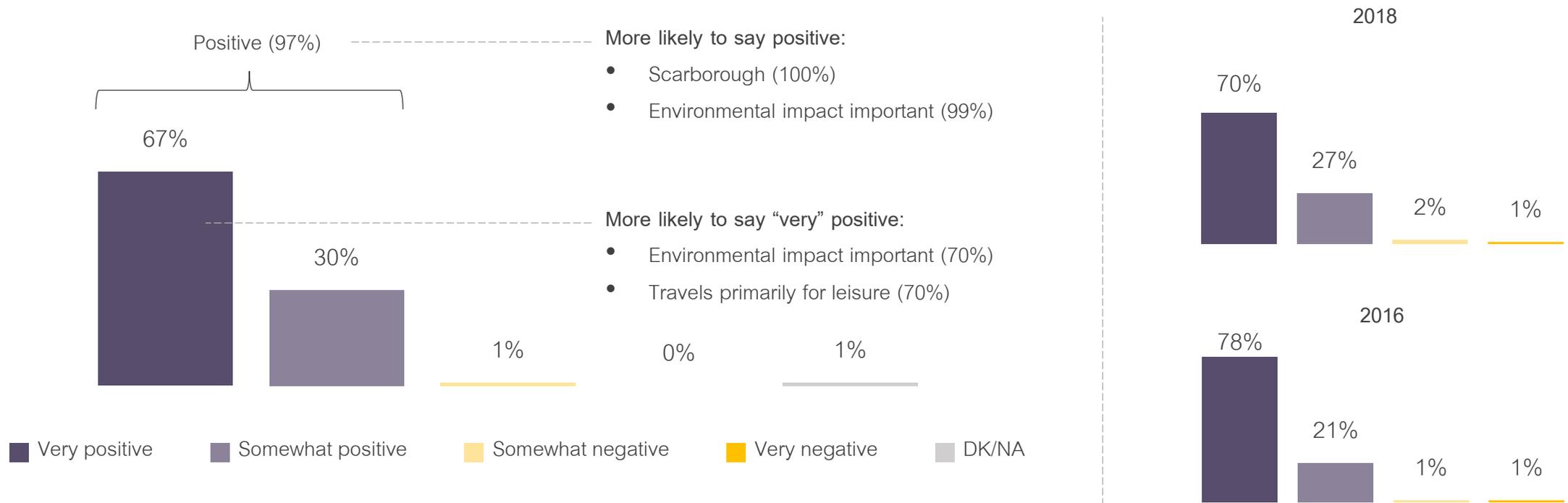
Q7. How do you typically get to Billy Bishop Airport? Subsample: Those who have used Billy Bishop Toronto City Airport. (N=504)



PortsToronto | Rating Experience with Airport

A strong majority of those who have flown with the BBTCA report positive experiences (97%), with two in three rating their experiences as “very positive.” Residents who report positive experiences with the Billy Bishop Airport are more likely to include those from Scarborough, and those who say environmental impact is important.

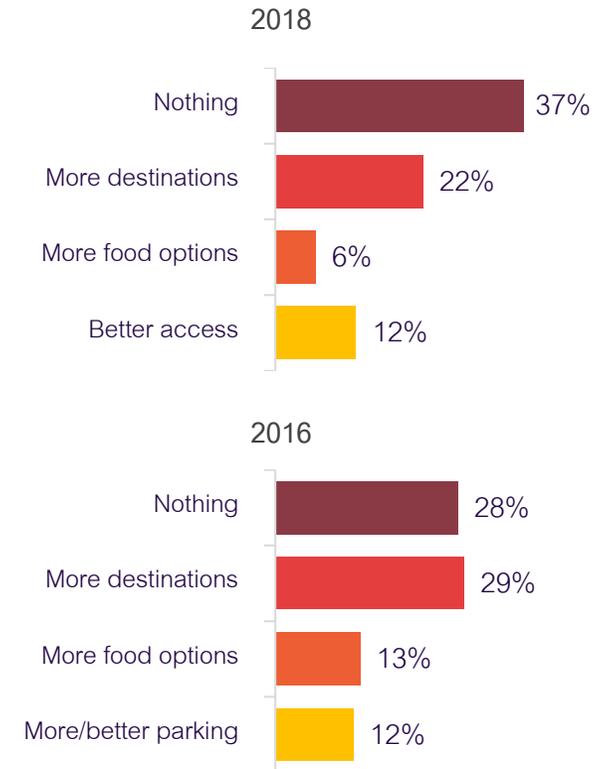
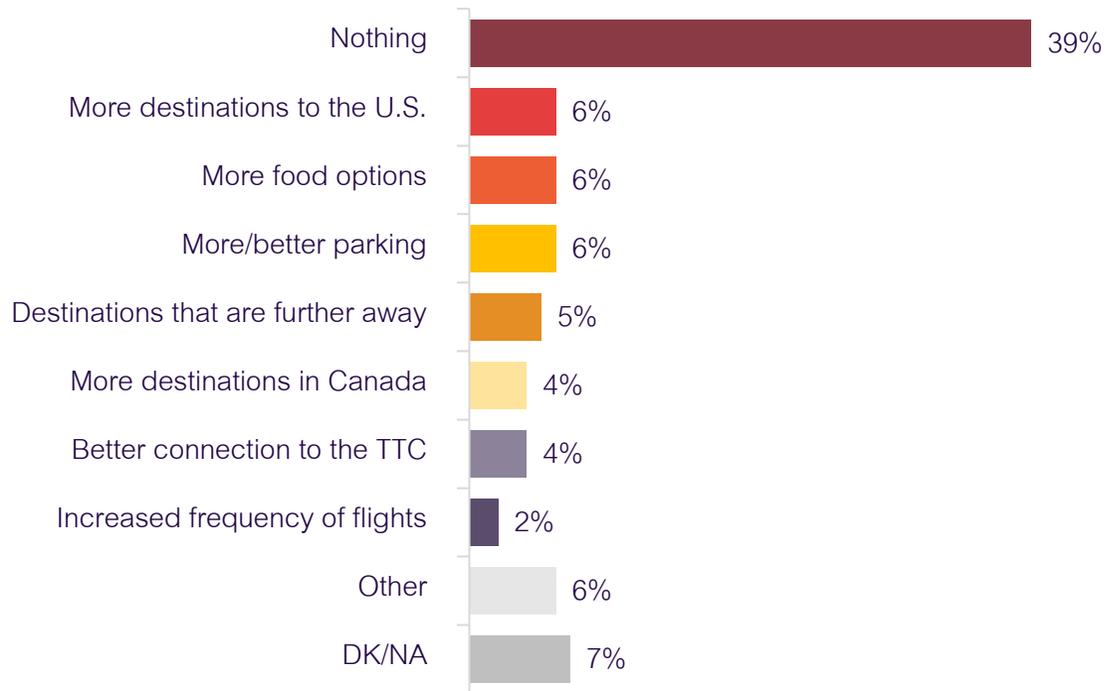
Q8. And how would you rate your overall experience using Billy Bishop Airport? Is it... Subsample: Those who have used Billy Bishop Toronto City Airport. (N=504)



PortsToronto | Suggestions for Improvement

Toronto residents continue to primarily suggest “nothing” would make the airport better (with two in five communicating this). Other top suggestions for improvement include adding more destinations to the U.S., more food options, and more/better parking.

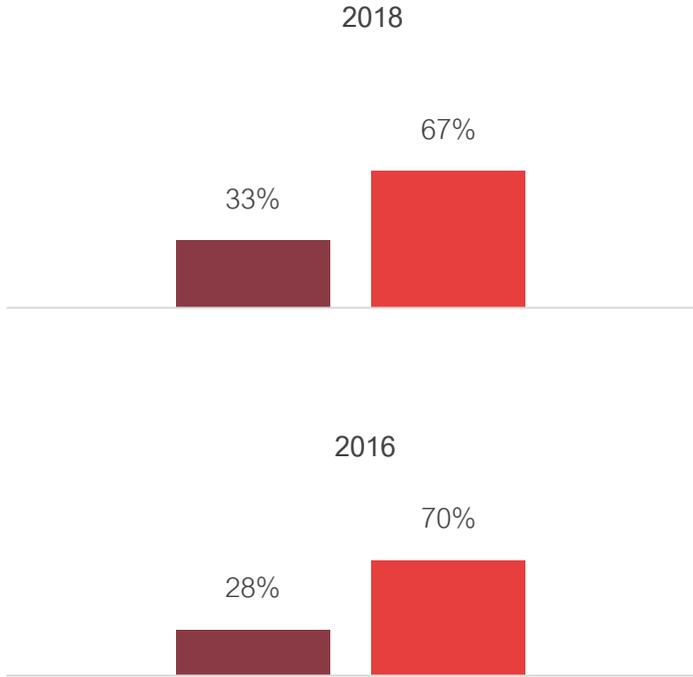
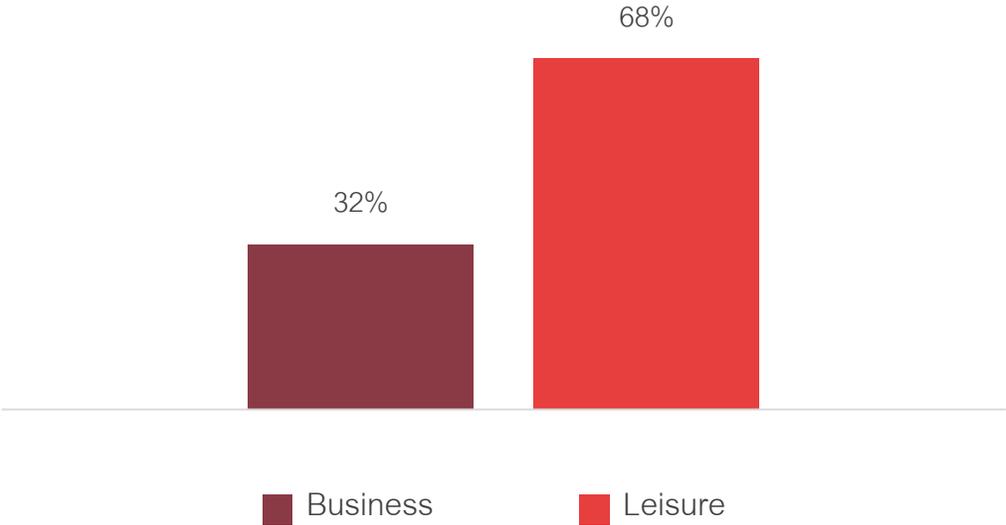
Q9. What would make the airport better? Subsample: Those who have used Billy Bishop Toronto City Airport. (N=504)



PortsToronto | Business vs. Leisure Travel

Toronto residents who have flown with the BBTCA say three in ten of their trips are for business, and seven in ten of their trips are for leisure. These results are on par with both the 2018 and 2016 surveys.

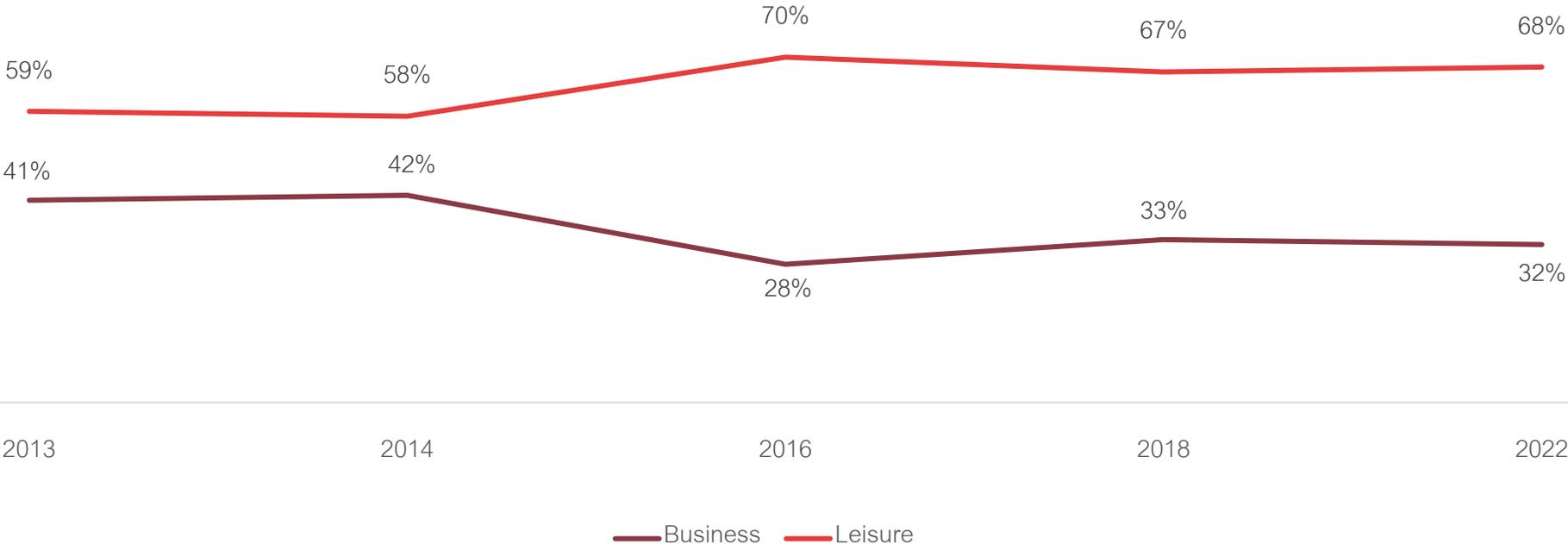
Q10.-Q11. What percentage of your trips out of Billy Bishop Airport would you say are for business and what percentage would you say are for pleasure or personal use?
Subsample: Those who have used Billy Bishop Toronto City Airport. (N=504)



PortsToronto | Business vs. Leisure Travel: Overview

Results from the 2022 survey, as well as past iterations of the survey, reveal that Toronto residents mainly take trips out of the Billy Bishop Airport for leisure rather than for business.

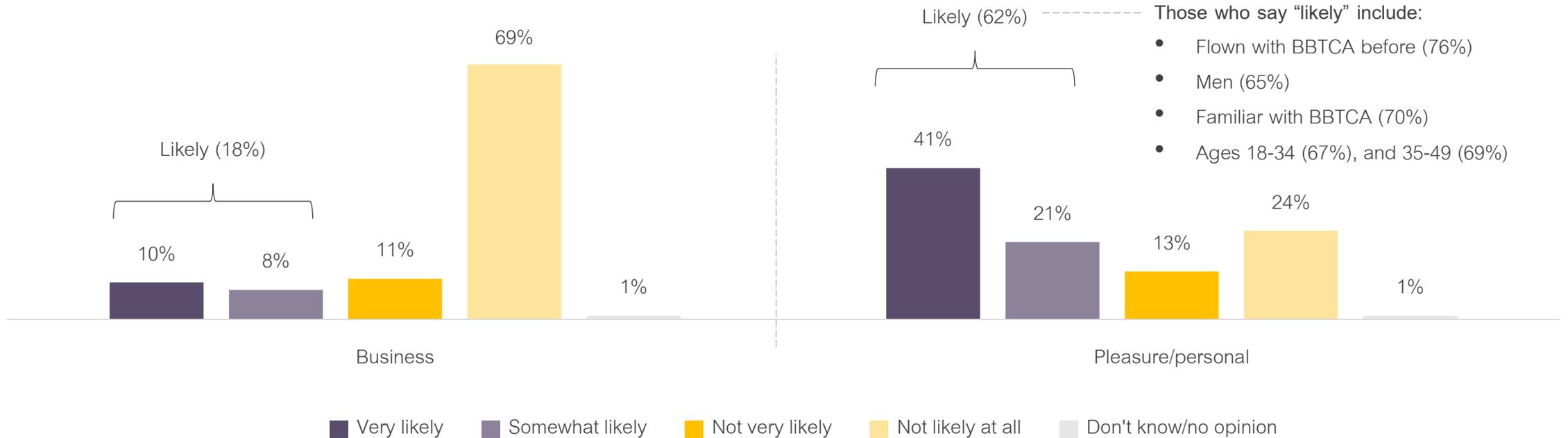
Q10.-Q11. What percentage of your trips out of Billy Bishop Airport would you say are for business and what percentage would you say are for pleasure or personal use?
Subsample: Those who have used Billy Bishop Toronto City Airport.



PortsToronto | Likely Reason for Future Travel

When asked about post-pandemic travel, Toronto residents say they are more likely to book air travel for leisure (62%) rather than for business (18%). These results are consistent with widespread preference for leisure travel above business travel out of the Billy Bishop Airport prior to the onset of the pandemic.

Q12. As Canadians emerge from the impacts of the pandemic and consider activities like travel again, how likely are you personally to book air travel for the following reasons within the next six months: (N=1,225)

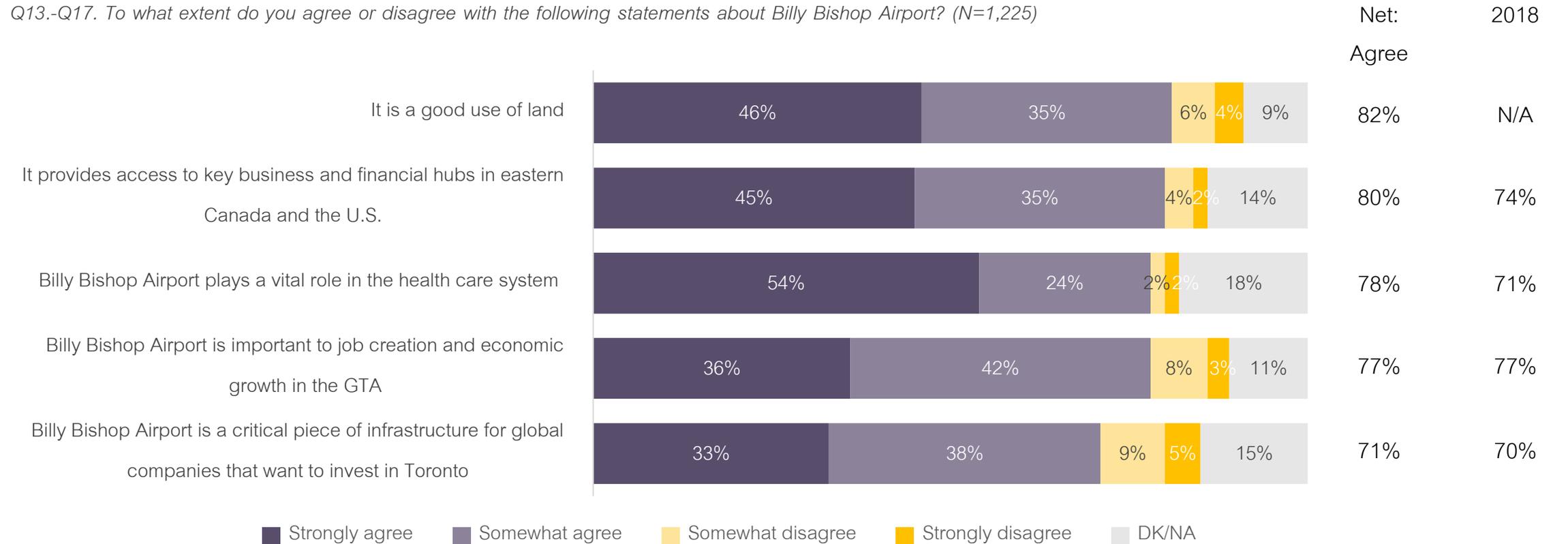


OPINIONS REGARDING A DOWNTOWN AIRPORT

PortsToronto | Views Regarding BBTCA's Impact

Most Toronto residents agree that the BBTCA is a good use of land, and that the airport plays a central role in business/the economy, health care, and job creation for the city. Agreement with statements regarding BBTCA's impact show little difference from the previous wave of the survey.

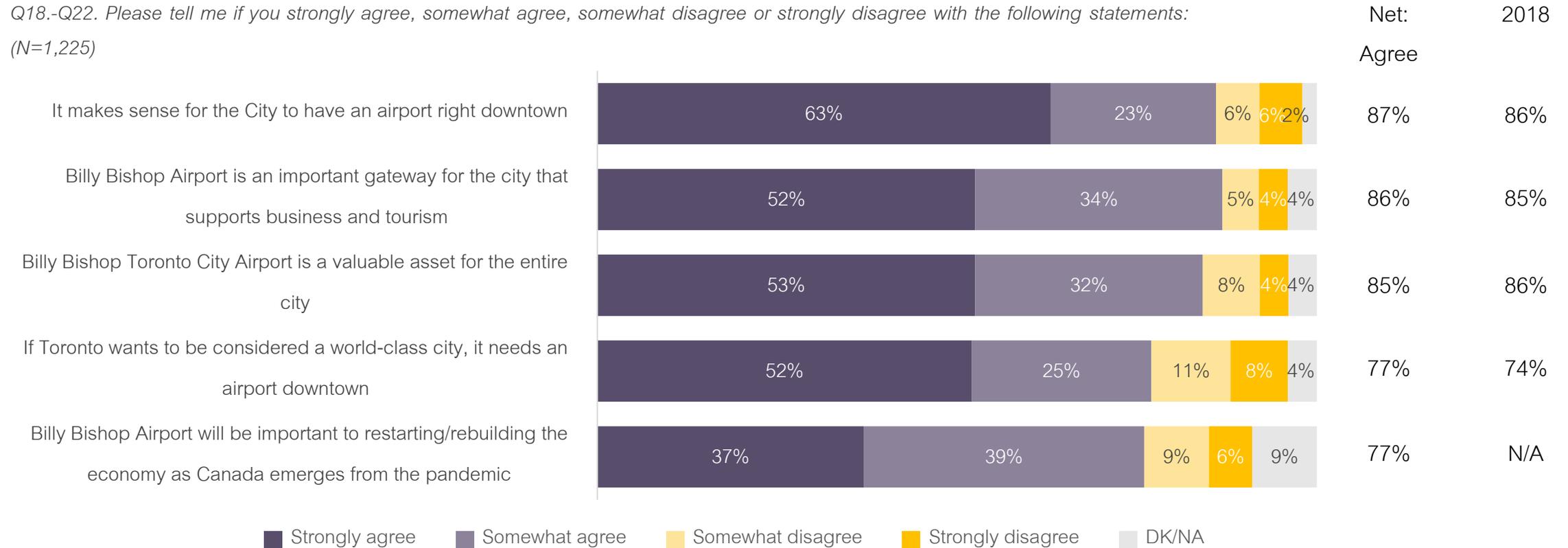
Q13.-Q17. To what extent do you agree or disagree with the following statements about Billy Bishop Airport? (N=1,225)



PortsToronto | Statements about BBTCA

A strong majority of Toronto residents agree with statements about the BBTCA that say the airport location “makes sense,” and that it is an asset to the city regarding tourism, business/the economy, and international perception. Agreement with these statements has remained consistent with 2018 survey results.

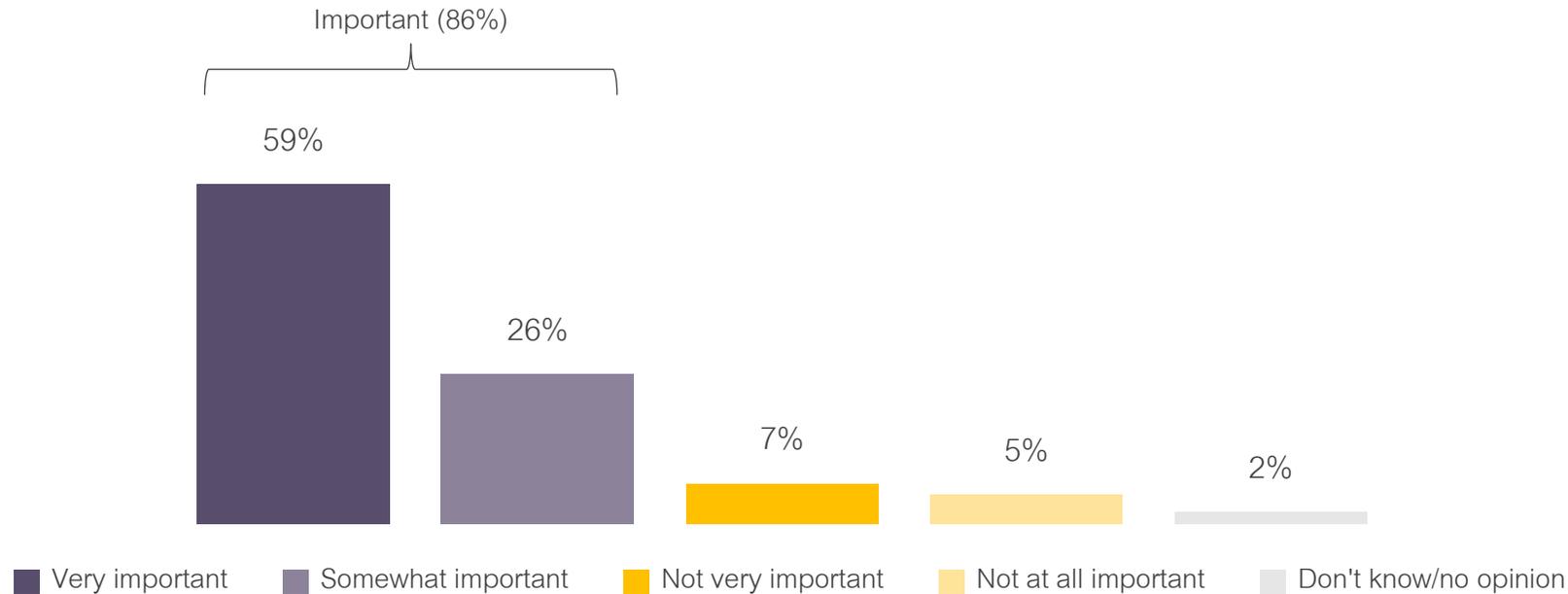
Q18.-Q22. Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements:
(N=1,225)



PortsToronto | **BBTCA's Environmental Impact**

Over eight in ten Toronto residents (86%) articulate it is important to them that measures are taken by the Billy Bishop Airport to reduce environmental impact. Those who say it is “very important” are more likely to include Old Toronto (64%) and Waterfront residents (63%), women (67%), as well as those age 50-64 (64%).

Q23. As a downtown airport, Billy Bishop Airport is committed to become cleaner, greener and quieter and operating in an environmentally sustainable matter... How important is it for you that measures like these are being taken to reduce the airport's environmental impact? (N=1,225)



Most likely to say important:

- Old Toronto (92%) & Scarborough (89%) residents
- Favourable opinion of BBTCA (89%)
- Women (88%)
- Newcomers (93%), 2SLGBTQ+ (94%), and Black/Indigenous (91%)

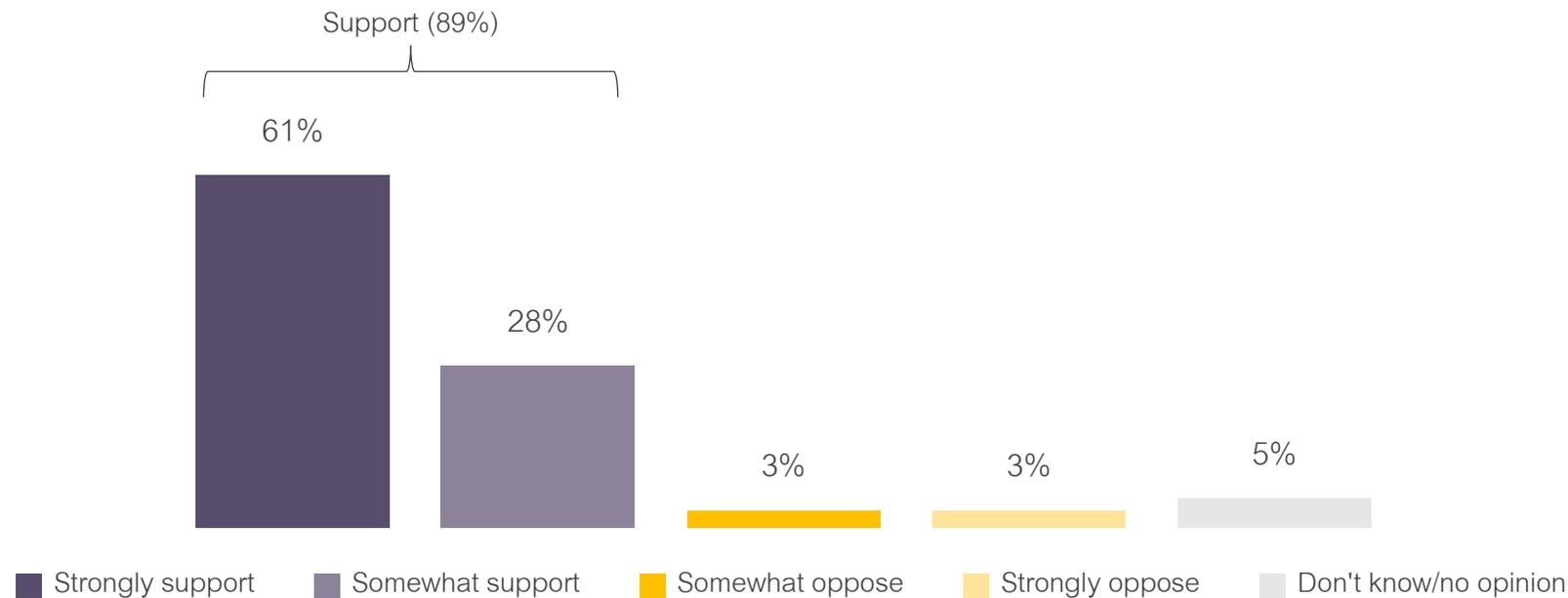
Most likely to say *not* important:

- Unfavourable opinion of BBTCA (22%)
- Men (16%)

PortsToronto | Support of Environmentally-Friendly Aircraft

There is strong support among Toronto residents (89%) for the introduction of new aircrafts that are quieter and better for the environment at the Billy Bishop Airport. Those who are most likely to communicate they “strongly support” these new aircraft include Old Toronto residents (69%), those age 35-49 (67%), in addition to those familiar with BBTCA (65%) who have had positive experiences with the airport (67%).

Q24. There have been advancements in technology that have resulted in new aircrafts that are quieter and better for the environment... Would you support or oppose the introduction of these types of aircraft, in addition to those currently permitted, for use at the Billy Bishop Airport? (N=1,225)



Most likely to support:

- Old Toronto residents (94%)
- Age 35-49 (94%)
- Household income of \$60K+ (93%)
- Favourable opinion of BBTCA (93%)

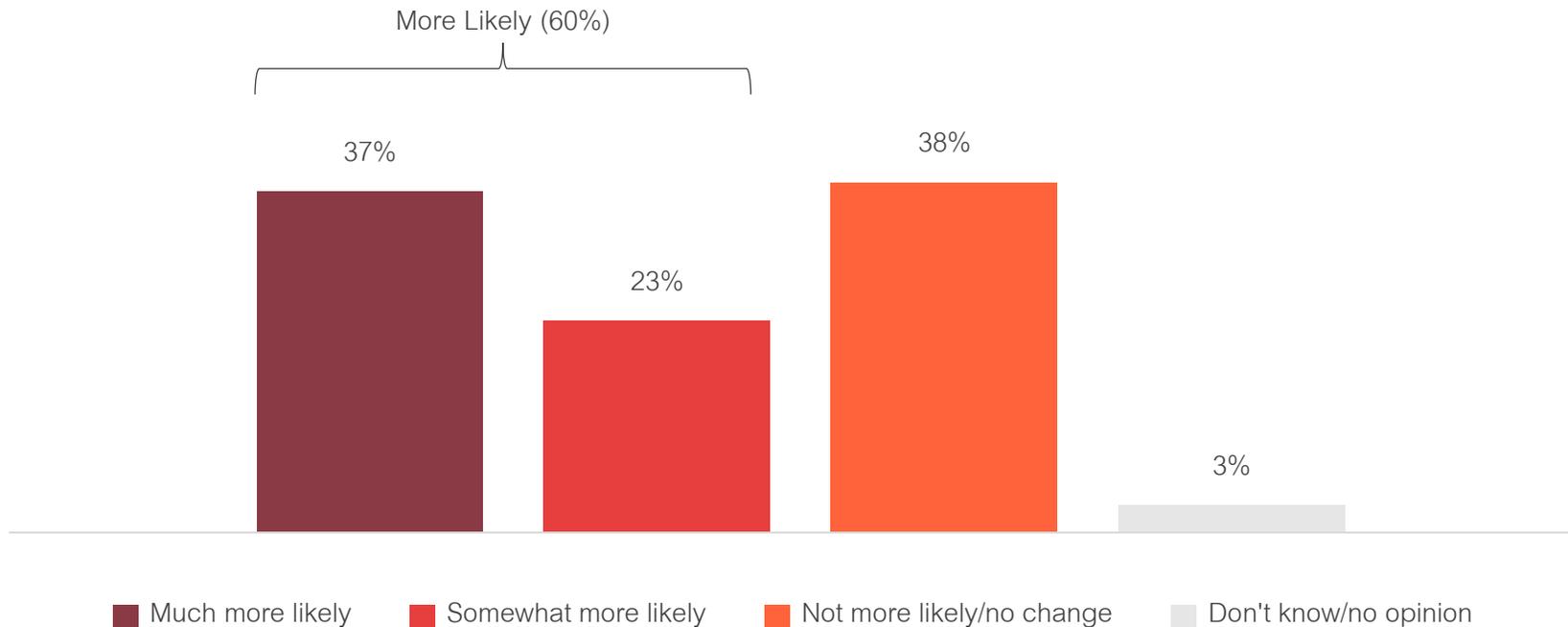
Most likely to oppose:

- Men (8%)

PortsToronto | Usage of Public Transport to BBTCA

Three in five Torontonians say they are more likely to utilize public transit to get to Billy Bishop Airport if it became more convenient, with approximately two in five saying “much more likely.”

Q25. How likely are you to use public transit to get to Billy Bishop Airport if it were more convenient than it is now? (N=1,225)



Those who say “much more likely”:

- Child <18 at home (48%)
- Familiar with BBTCA (42%)
- Those aged 18-34 (42%) and 35-49 (45%)

Those who say “not more likely/no change”:

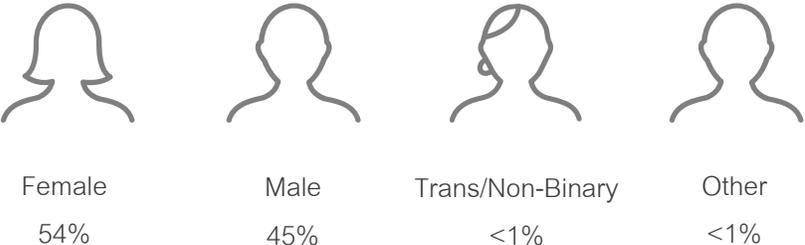
- Age 65+ (45%)
- Not familiar with BBTCA (44%)

DEMOGRPAHICS

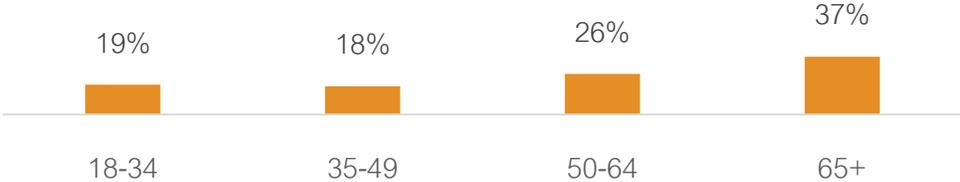
PortsToronto | Demographics

Below are demographic details of the survey participants:

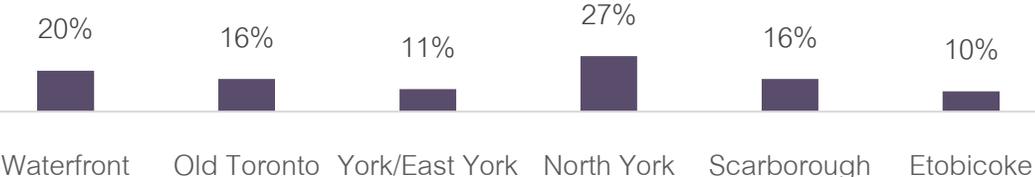
Gender



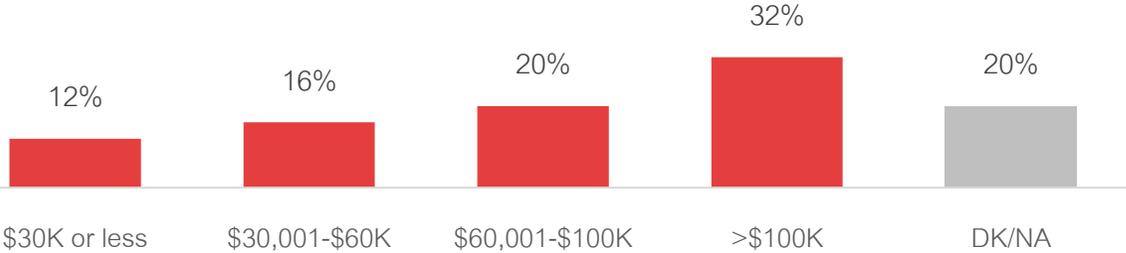
Age



Region



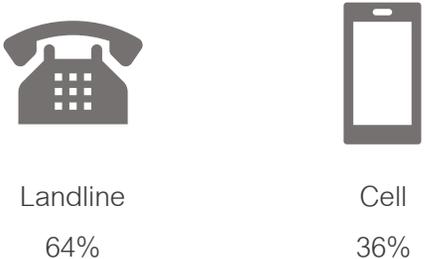
Household Income



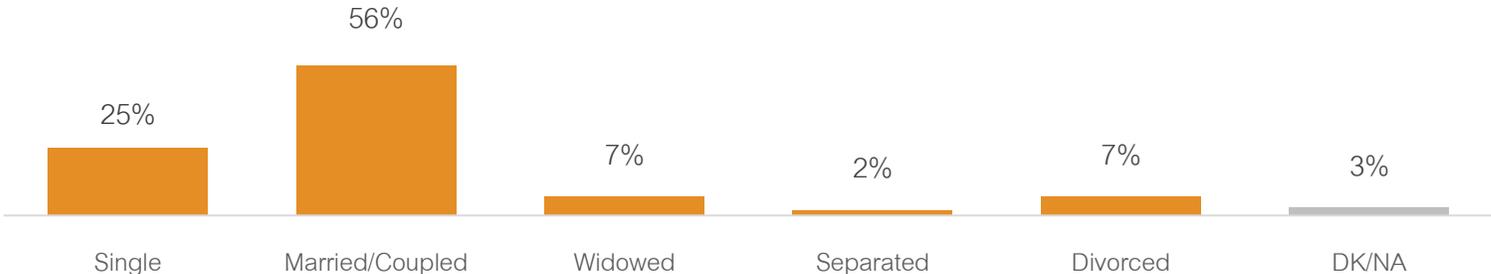
PortsToronto | Demographics

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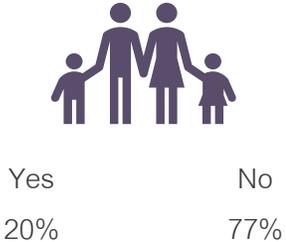
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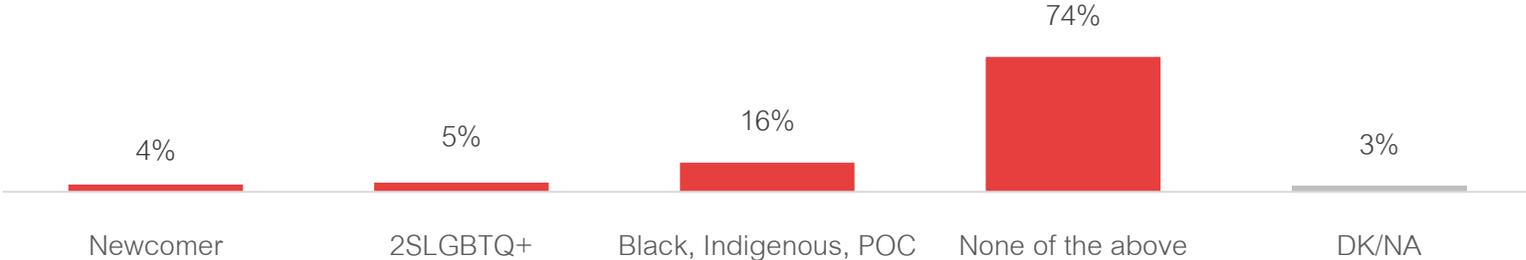
Relationship Status



Child/Children Under 18 in Household



Minority Group



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