

COUNT *on* PEARSON

*Contributing to
Canada's Prosperity*



Toronto Pearson

COUNT *on* PEARSON

To support growing demand for air travel by careful planning and investments

Growth

- 85 million passengers by 2037
- Careful planning & Investments

Connectivity

- More destinations & carriers

Benefits

- Increases in trade, tourism, jobs, and immigration



TIME	DESTINATION	AIRLINE	STATUS	ALTERNATIVE
14:20	CALGARY	AC 145	OK	ALYNEURE
14:20	MONCTON	AC 808	OK	ALYNEURE
14:40	EDMONTON	AC 188	OK	ALYNEURE
14:40	HALIFAX	AC 814	OK	ALYNEURE
14:40	MONTRÉAL	AC 418	OK	ALYNEURE
15:30	SANT JOVEN	AC 890	OK	ALYNEURE
15:30	QUÉBEC	AC 750	OK	ALYNEURE
15:30	VANCOUVER	AC 118	OK	ALYNEURE
16:00	NORTH BAY	AC 867S	OK	ALYNEURE
16:10	WINDSOR	AC 867S	OK	ALYNEURE
16:10	OTTAWA	AC 113	OK	ALYNEURE
16:10	ST. JOHN'S	AC 868	OK	ALYNEURE
16:10	ST. JOHN'S	AC 488	OK	ALYNEURE
16:40	SHERBROOK	AC 861	OK	ALYNEURE
16:50	SALABRIE	AC 807	OK	ALYNEURE
17:00	MONTRÉAL	AC 400	OK	ALYNEURE
17:00	SARNA	OK 785	OK	ALYNEURE

Count on Pearson to invest in the necessary airport infrastructure to meet growing demand

1997-2013

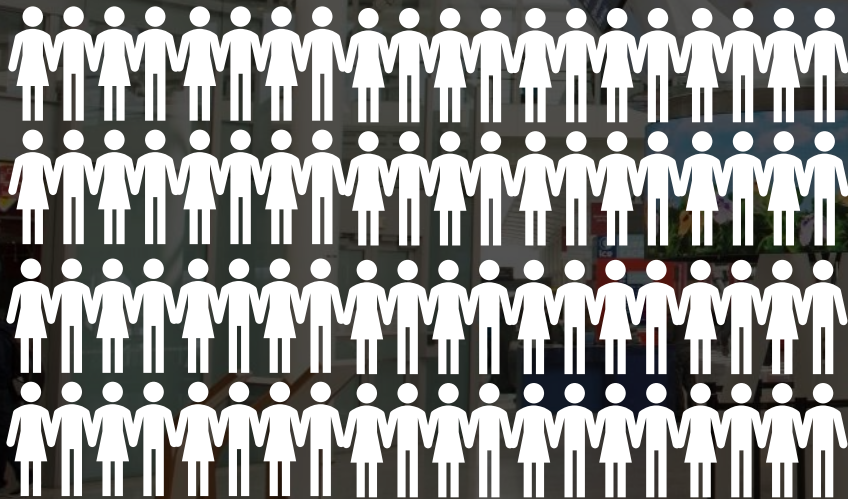
10M passengers in 16 years

2014-2017

10M passengers in 4 years



40M passengers in next 20 years



2017-2037

- New modern terminals with long-term plan to grow as required
- New baggage systems to handle increased volumes
- Planning for new passenger processing facility to handle growing demand

Count on Pearson to deliver a great travel experience...



Toronto Pearson

building on our #1
quality ranking
among North
American airports,
2 years running.



4.31
out of 5



4.45
out of 5

COUNT on PEARSON



Count on Pearson to provide access to global markets to promote Canadian trade diversification



Toronto Pearson

5th most connected airport in the world

Rank	Airport	Country	Connectivity Index	Dominant Carrier	Share of Flights at Hub
1	LHR	United Kingdom	333	British Airways	52%
2	ORD	USA	306	United Airlines	48%
3	FRA	Germany	302	Lufthansa	63%
4	AMS	Netherlands	286	KLM	51%
5	YYZ	Canada	271	Air Canada	60%
6	LAX	USA	257	American Airlines	21%
7	ATL	USA	256	Delta Air Lines	79%
8	SIN	Singapore	253	Singapore Airlines	23%
9	CDG	France	250	Air France	51%
10	CGK	Indonesia	249	Garuda Indonesia	28%
11	MUC	Germany	237	Lufthansa	59%
12	KUL	Malaysia	233	AirAsia	40%
13	HKG	Hong Kong (SAR), China	233	Cathay Pacific Airways	26%

Source: OAG



72% connectivity with Global GDP through a daily, year-round, non-stop flight

COUNT on PEARSON

Count on Pearson to provide access to global markets to promote Canadian trade diversification



Toronto Pearson

Pearson facilitates or generates:



\$11 Billion in Exports.
\$17 Billion in Imports.



\$42 billion
(6%) of Ontario's GDP



\$25 Billion in Outward FDI.
\$23 Billion in Inward FDI.



50,000 direct jobs at
Toronto Pearson.

Source: Frontier Economics

**COUNT on
PEARSON**

Toronto Pearson in your community



Toronto Pearson

\$41M

Procurement from
York businesses

17,000
Jobs

Street Team will
be at
Woodbridge
Village Farmers
Market

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Toronto Pearson in your community



Toronto Pearson

Toronto Pearson Open Houses

Reaching out to
communities to
highlight the airport

Recently in
Vaughan-Woodbridge
with 40 people attending



Mega hub airports of the world



Toronto Pearson



Delivering transit and addressing congestion



Toronto Pearson

Challenges:

- Toronto Pearson is at the heart of the 2nd largest employment zone in Canada, home to more than 300,000 workers
- Businesses cannot attract workers and workers cannot access good jobs around the airport
- Lack of ground connections means there are more than 1 million car trips per day in and out of the airport employment zone
- Goods are stuck in congestion around the airport
- Only 10% of passengers and employees take transit to get to Pearson; the best in the world do much better – Hong Kong 50%; Schiphol 40%; Shanghai 60%

**COUNT ON
PEARSON**

Toronto Pearson is well situated to connect jobs and innovation centres across the Greater Golden Horseshoe



Toronto Pearson

LEGEND

- Airport
- University
- Knowledge Intensive District
- Key Centres
- Rapid Transit - Existing
- Rapid Transit - Proposed
- Employment Cluster
- The Toronto-Waterloo Region Innovation Corridor

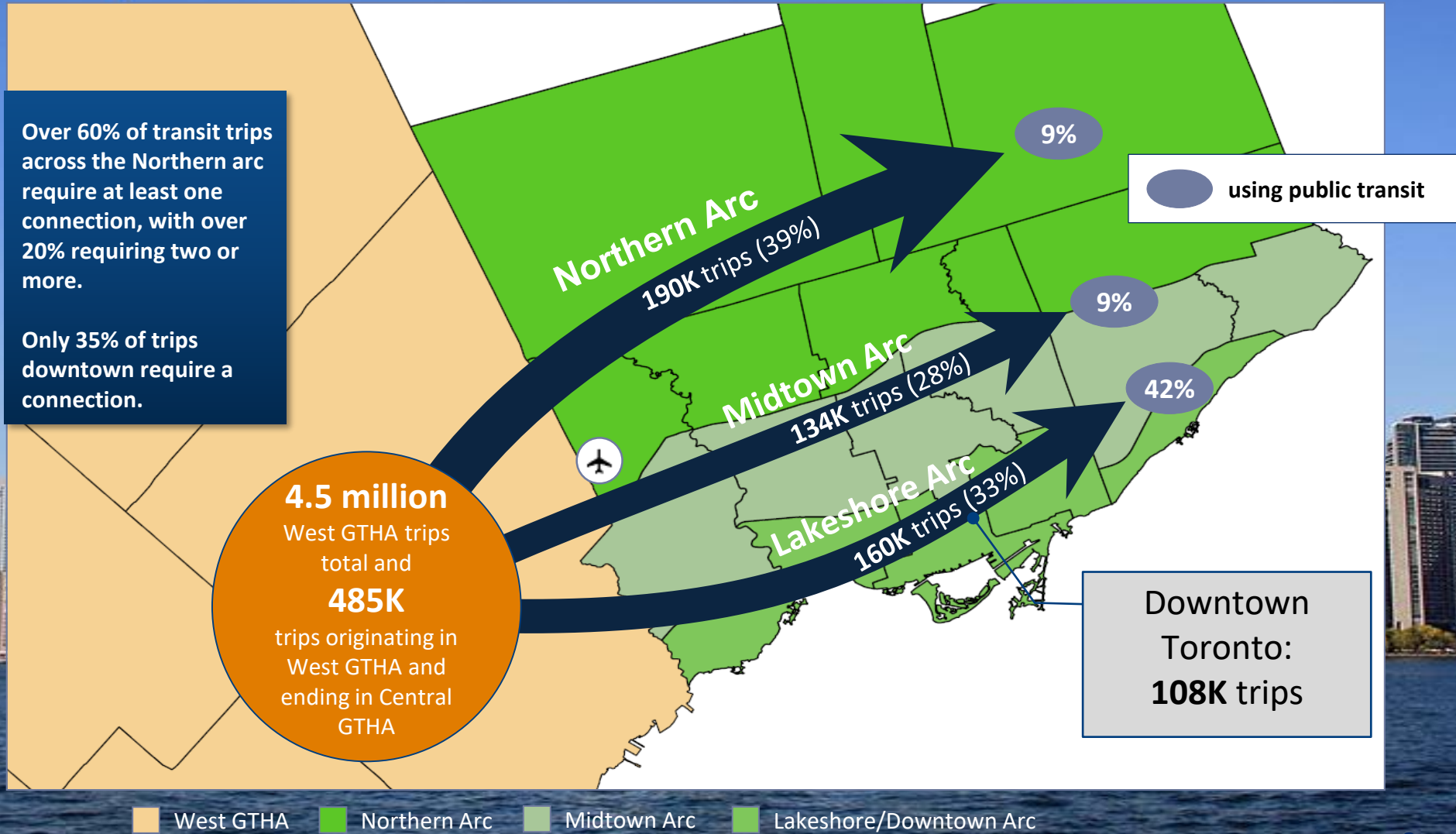


- University of Toronto (St. George)
- Ryerson University
- OCAD University

Nearly twice as many West GTHA commuters travel across the top of the GTA, the “Northern Arc,” than to downtown. Toronto Pearson is well situated to serve this demand.



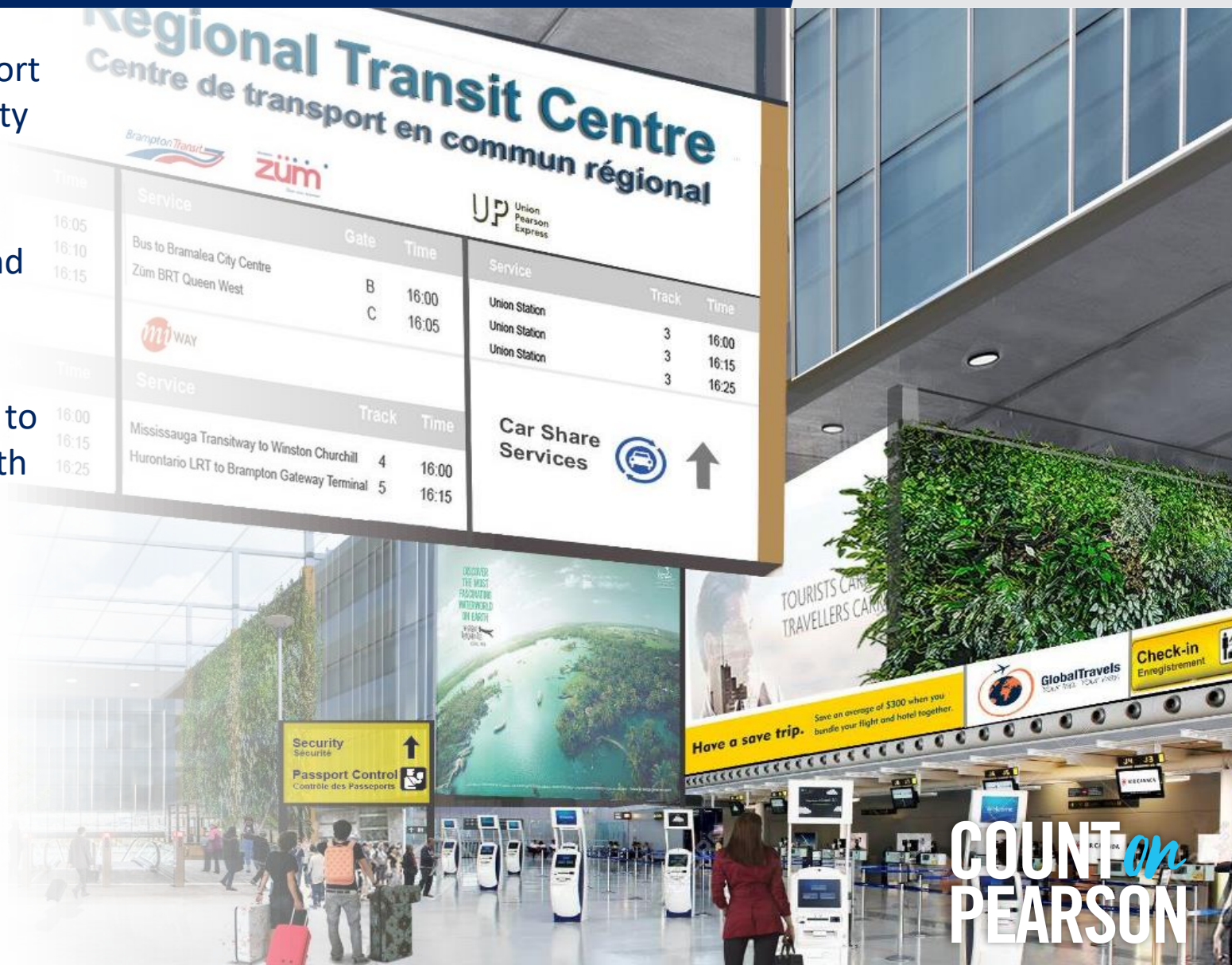
Toronto Pearson





Gaining momentum with “Union Station West”

- Toronto Region Board of Trade published report Jan 31 endorsing Union Station West as priority infrastructure
- Regular planning coordination with federal and provincial officials
- April 10th the Province of Ontario committed to an extension of Eglinton Crosstown to Renforth and to establishing a connection to Toronto Pearson
- Transit listening tables in Q3 2019 (incl. York Region staff)
- Engagement with transit operators (incl. York Region) on planning and short-term improvements



Growing regions need multiple assets to support demand



Toronto Pearson





Managing the impact on our neighbours

- Improved community forums
- Clear, timely communications
- Quieter fleet incentives



GROWING RESPONSIBLY

2018-2022

Noise Management Action Plan



Toronto
Pearson

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Thank you

