

# Pearson Connects

*Growing Canada with a mega hub airport*

*March 1, 2017*

*Greater Toronto Airports Authority*



Toronto Pearson



# About Toronto Pearson

Canada's airport, offering more flights than any airport in the country

Managed and operated by the not-for-profit GTAA since 1996

No taxpayer subsidies to fund operations or development



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# Growth Story

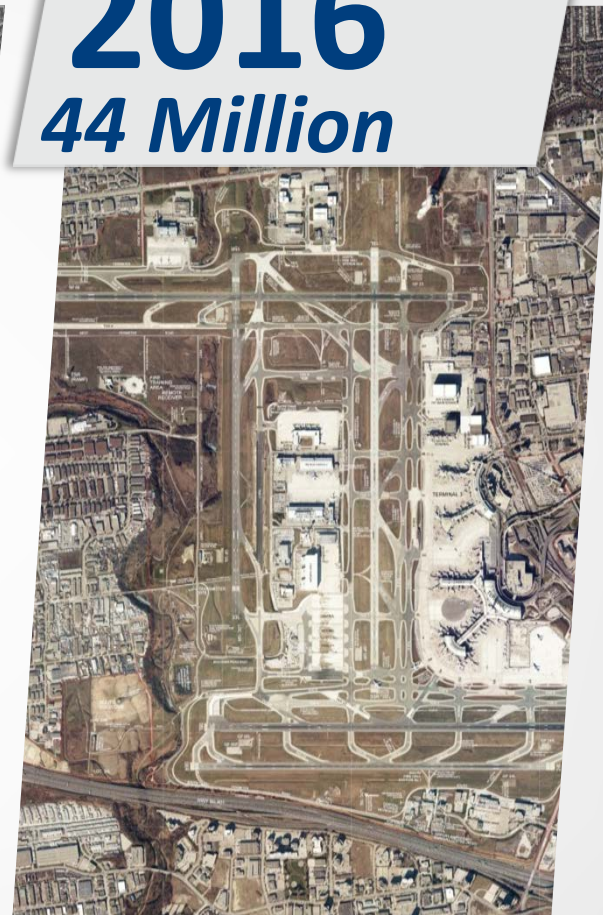
**1970s**  
*10.5 Million*



**1990s**  
*21 Million*



**2016**  
*44 Million*



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# Passenger growth & aircraft movements

## Passengers

**2014**  
*38.6 Million*

**2015**  
*41 Million*

  
6.4%

## Movements

**2014**  
*435,000*

**2015**  
*444,000*

  
2.1%



An aerial photograph of Pearson International Airport in Toronto, Canada. The image shows the extensive runway system, taxiways, and terminal buildings. A large white banner with a blue border is overlaid across the center of the image, containing the text "Pearson Today".

# Pearson Today



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# Global connectivity



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Reaching **67%** of the world's economy with daily, non-stop flights

**180**  
Destinations



# Job generator



**49,000** airport jobs

**332,000** jobs generated or facilitated



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# International gateway

JFK

YYZ

**2<sup>nd</sup>** in North America in terms of international passengers



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# Goods movement



**50%** of Canada's air cargo



# Economic catalyst



**6.3%** of Ontario's GDP  
(\$42B)



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# Mega hubs of the world



Poised to be North America's next mega hub.



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# Why be a mega hub?



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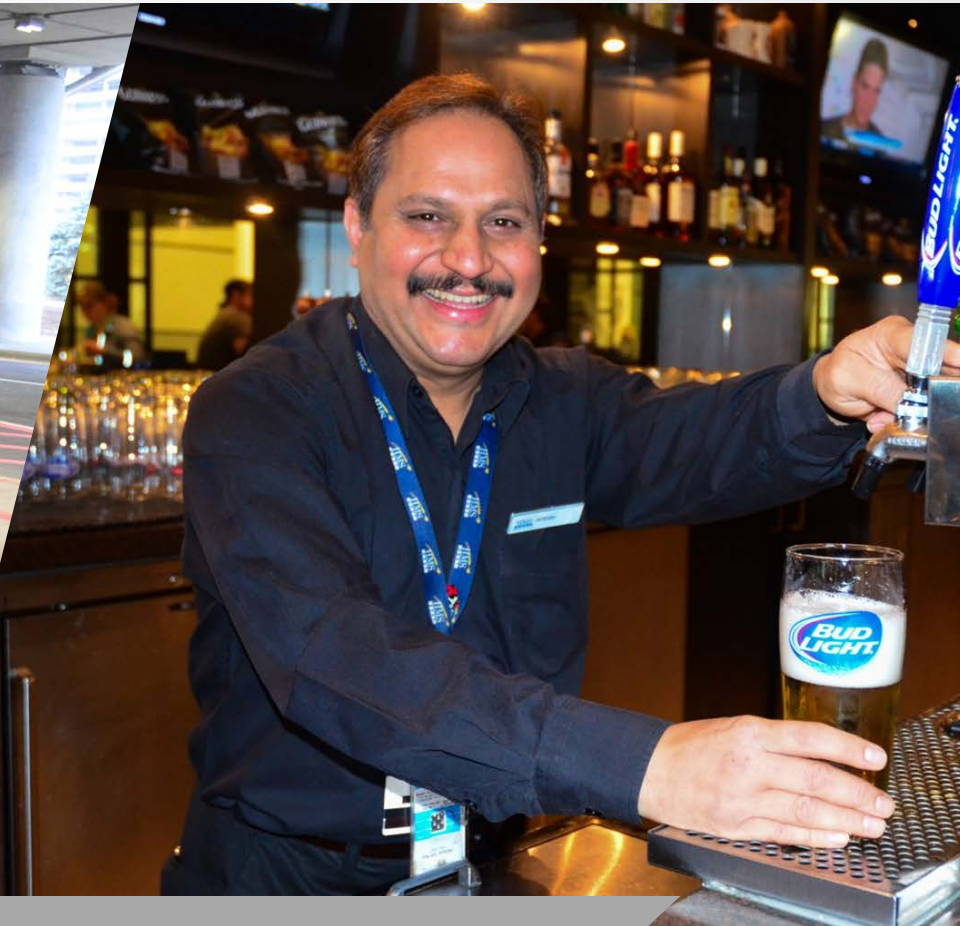
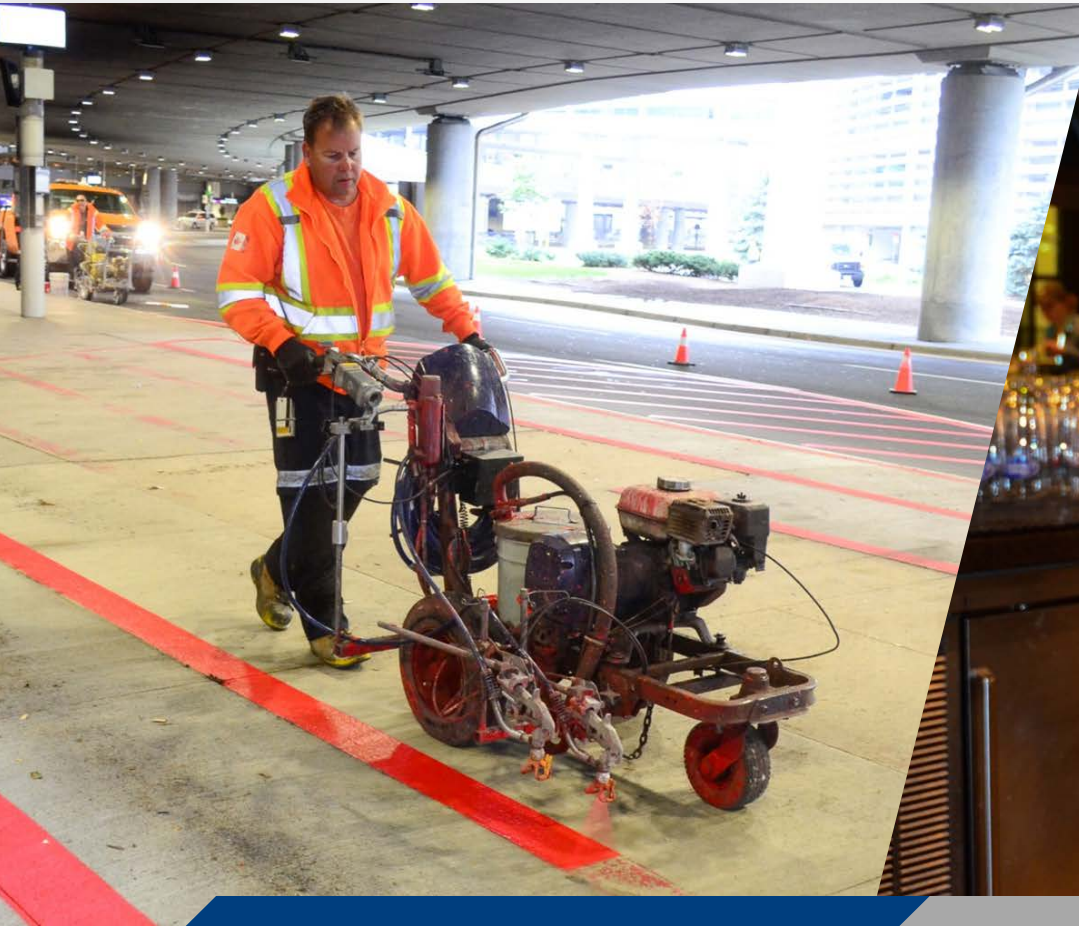


# Global competitiveness



Connected to 80%+ of  
global economies

# Significant job growth



**700,000** jobs generated or facilitated

**8.5%** of Ontario's GDP



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An aerial photograph of an airport terminal and surrounding runways. A white banner with a blue border is overlaid across the center of the image, containing the text "How can we unlock growth?". The terminal building is visible in the foreground, with many aircraft parked at gates. The runways and taxiways extend into the distance, with a city skyline visible in the far background.

**How can we unlock growth?**



**Toronto Pearson**



# Reaching the economic potential of Toronto Pearson

2035

Today

1

## Regional transit network:

Connect to Southern Ontario with a multi-modal hub

2

## Shorter wait times for passengers:

Increased funding for CATSA and CBSA

3

## International Passenger Supportive Policies:

Regulatory changes to support international passenger movement

4

## Being a good neighbour:

Growing responsibly and sustainably



### Mega Hub

- 8.5% of Ontario GDP
- Up to 700,000 jobs
- Connected to 80% of global economies

### Global Hub

- 6.3% of Ontario GDP
- 332,000 jobs
- Connected to 67% of global economies



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# Regional transit network: Toronto Pearson regional transit centre



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# 2<sup>nd</sup> largest employment zone



**300,000** jobs



# Growth brings congestion



1 million car trips every day

25-35% increase in driving time by 2043



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# Transit mode share

Less than **10%** of passengers at YYZ take public transit



**36%**  
London  
Heathrow

**40%**  
Amsterdam  
Schiphol

**50%**  
Hong Kong  
Kai Tek

**60%**  
Shanghai  
Pudong



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# Regional transit centre



**Toronto Pearson committed to making investments in facilities; looking to government to invest in transit lines to connect**

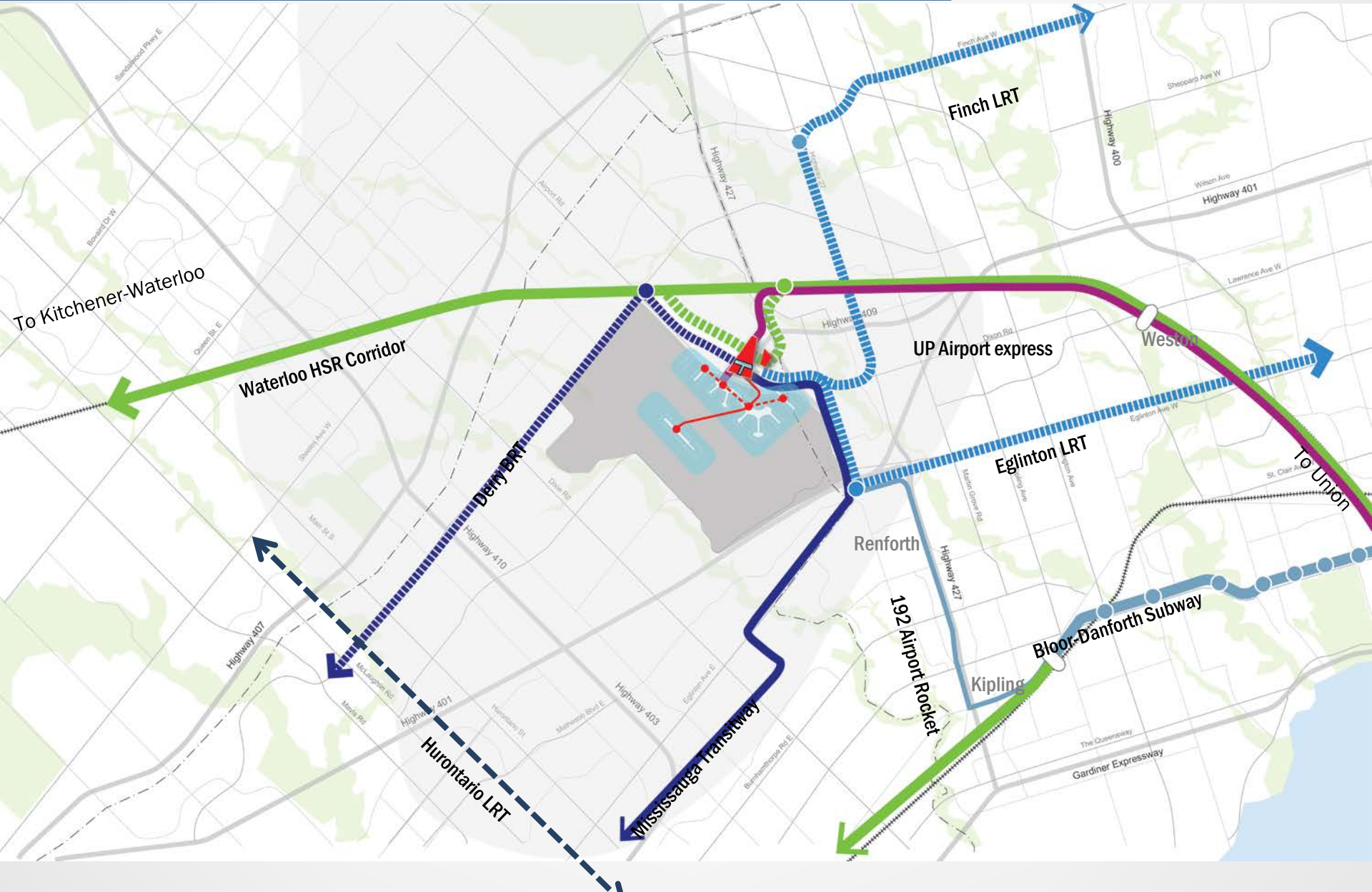


# Transit and rail connectivity - Today





# Connecting our region



# Support from our partners

**“There’s a lot happening and there’s lots more to do, including better connections to Toronto Pearson.”**

**-Hon Steven Del Duca, Minister of Transportation, MPP (Vaughan)**

**“Pearson is more than just an airport – it is a regional and national asset that must be utilized...We support a vision that re-imagines Toronto Pearson as the Union Station of the GTA West and Mississauga is ready to do its part to make this happen.”**

**-Mississauga Mayor Bonnie Crombie**

**“A major multi-modal transit centre serving the western GTA, located at our airport will provide a critical connection between Brampton and the rest of the world.”**

**-Brampton Mayor Linda Jeffrey**

**“I think the very fact we’re having the discussion now is very positive and we should now move to that next stage of deliberations.”**

**-Toronto Mayor John Tory**



# **Better transit reduces congestion, and...**



**Enables business passengers to access business centres across Southern Ontario quickly, in addition to the UPX enabled Downtown Toronto.**

**Reduces congestion on roads for improved “just in time” delivery of cargo to and from Pearson.**

**Provides workers in the airport zone with an affordable way to get to work, linking low income neighbourhoods to the hundreds of thousands of jobs.**



# Shorter wait times for passengers



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# Becoming an airport of choice: Passenger convenience



## Hong Kong

95% screened in 5 minutes or less

## London Heathrow

95% screened in 5 minutes or less

## Toronto Pearson

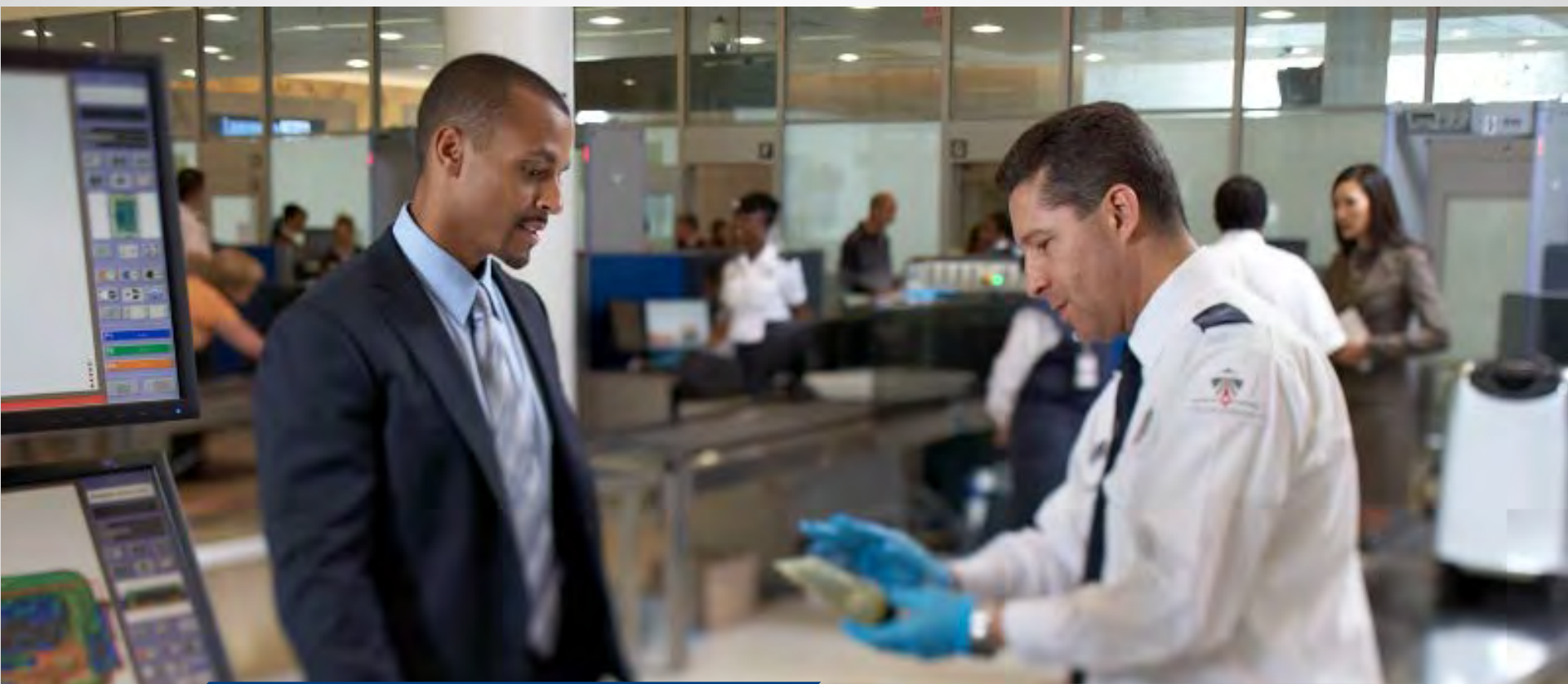
72% screened in 10 minutes or less

airport  
jobs



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# Congestion at security



Ensure security services are funded for growth

Security screening standard of 95 per cent in 10 minutes for all Canadian airports



# Congestion at borders



Ensure Border services are funded for growth at Pearson

Set CBSA processing standard at 90% in 20 minutes



# International passenger supportive policies



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# Growing non-aeronautical revenue



Arrivals Duty Free



Dual Duty Free

# Arrivals Duty Free benefits



**\$2.9M** in provincial income taxes, **\$18.6 million** in corporate income taxes.

**\$33.5M** new revenues from LCBO mark-up and levies.

**300 jobs.**



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# Dual Duty Free benefits



**Generate an additional \$16 million in sales revenue in Canada, and incremental provincial and federal taxes of approximately \$2.3 million annually.**

**At Pearson, sales to domestic travellers would amount to \$7 M annually, generating \$1 million in incremental HST for Ontario.**



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# Being a good neighbour: growing responsibly and sustainably



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# Industry leader in growing sustainably



Noise  
Management

Environment



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# Committed to engagement & conversation





# An active community member



**Outreach & Events**



**Community Investment**



**Toronto Pearson has the potential to unlock economic opportunity from coast to coast.**

**Realizing the airport's full potential will need the support of partners like you.**

***Thank You!***



**Toronto Pearson**