

COUNT *on* PEARSON

*Contributing to
Canada's Prosperity*



Toronto 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

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

1997-2013

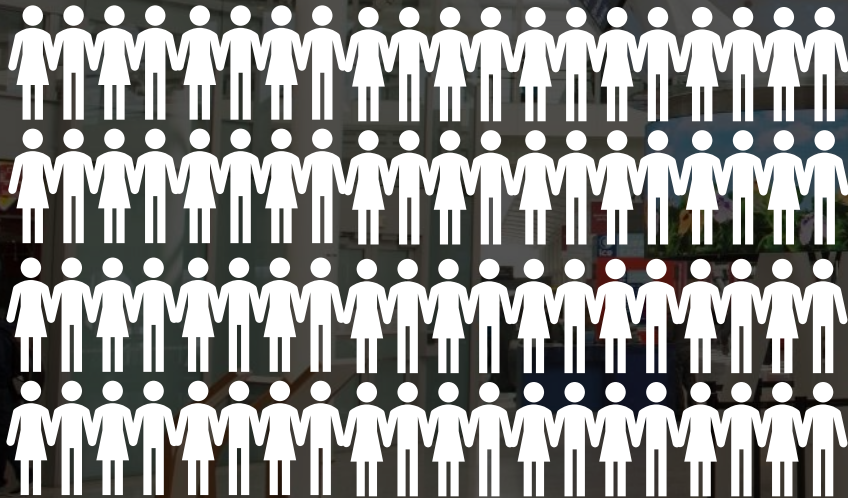
10M passengers in 16 years

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 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

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.



400 jobs created by a daily international service.

Source: Frontier Economics

**COUNT on
PEARSON**

Mega Hub airports of the world



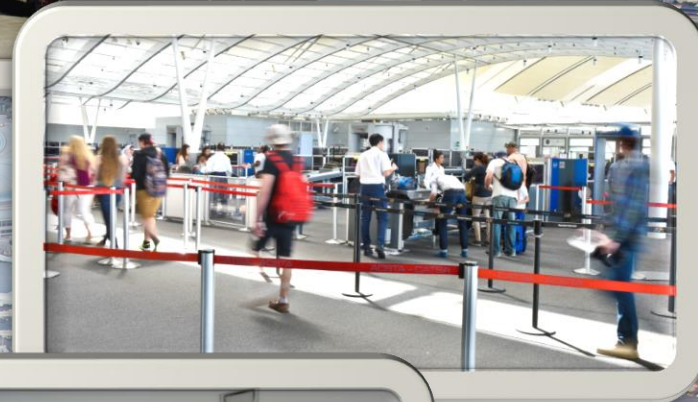
Count on Pearson to partner with government and be an innovative thought leader



Toronto Pearson

On processing

- Technology and frontline staff (CATSA + CBSA) to more quickly and efficiently move passengers through the terminal
- Faster, easier connection processing (e.g. ITI and ITD)



On passenger service and experience

- Convenient Cash and Carry Duty Free

On transit

- Vision for multi-modal transit hub to serve airport and region, address congestion and keep cargo moving



COUNT *on*
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**

“Union Station West” enables trade diversification and jobs

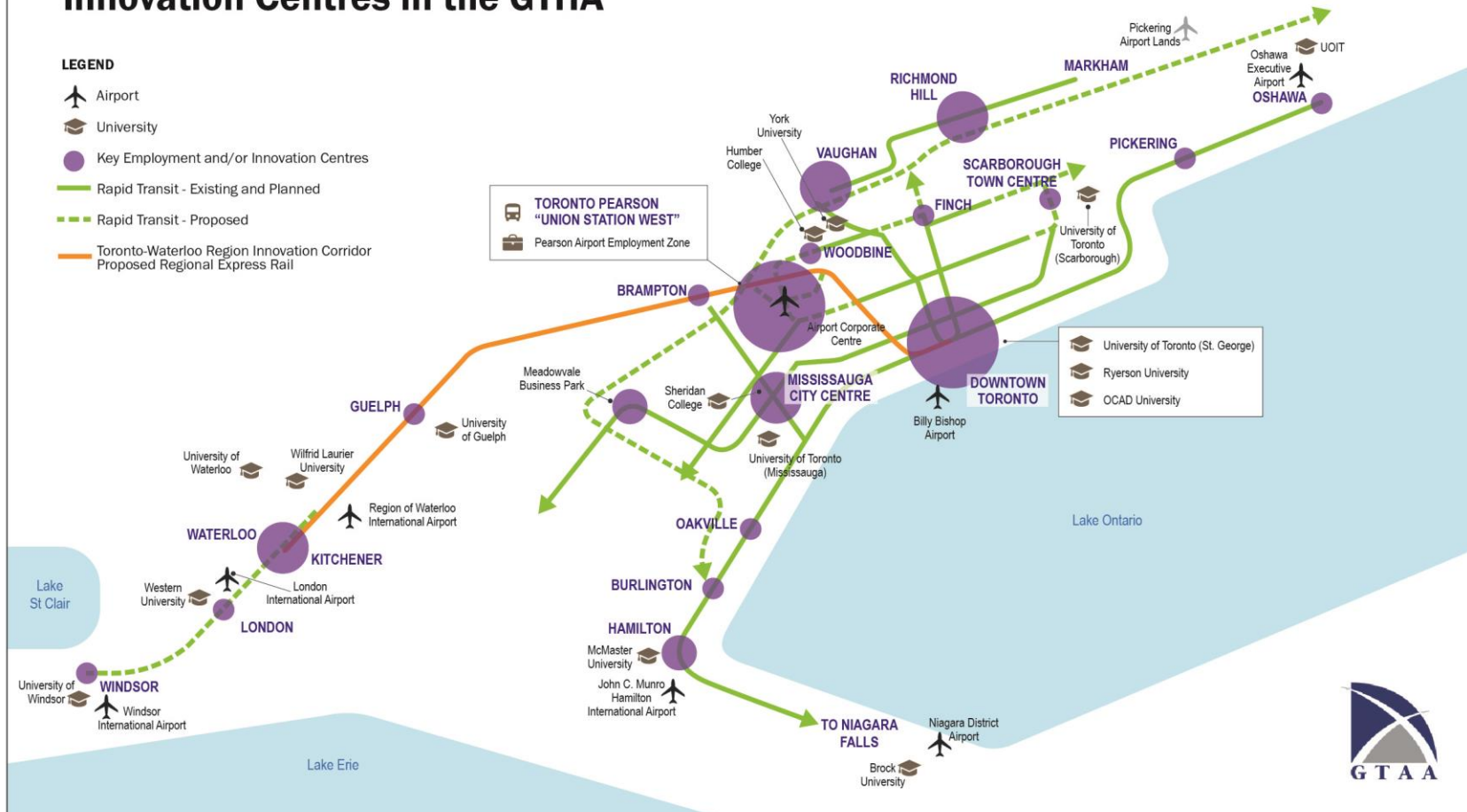


Toronto Pearson

Pearson: Connecting Jobs and Innovation Centres in the GTHA

LEGEND

- Airport
- University
- Key Employment and/or Innovation Centres
- Rapid Transit - Existing and Planned
- Rapid Transit - Proposed
- Toronto-Waterloo Region Innovation Corridor Proposed Regional Express Rail



A new multi-modal transit and mobility hub would:

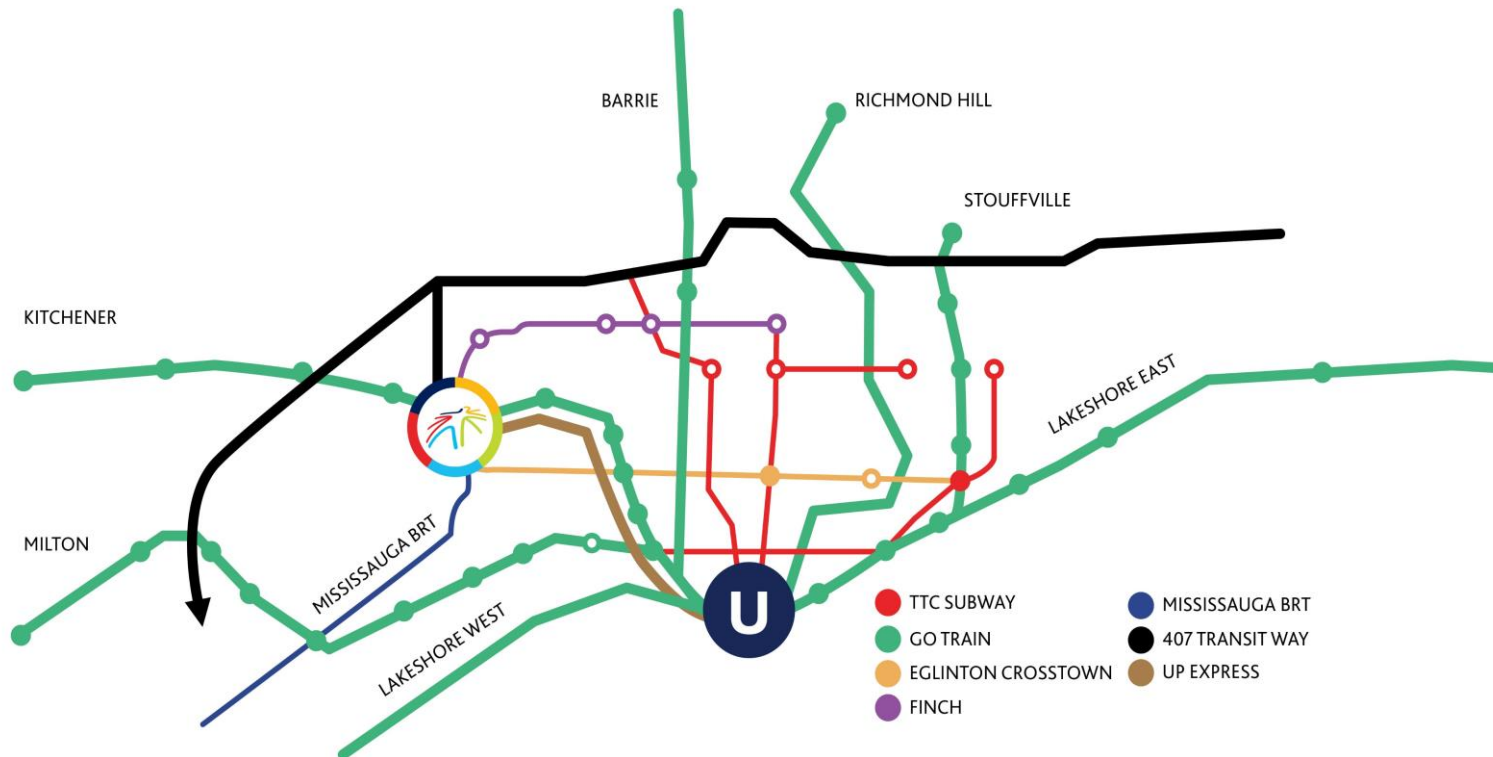
- provide regional transit network connectivity
- allow for higher value, intensified employment lands
- connect people to jobs and amenities
- free up road and air assets for higher value use
- encourage more sustainable travel modes.

Future: Integrated transit services at Pearson



Toronto Pearson

Unlocking regional connectivity,
helping goods to move more freely



Our Asks:

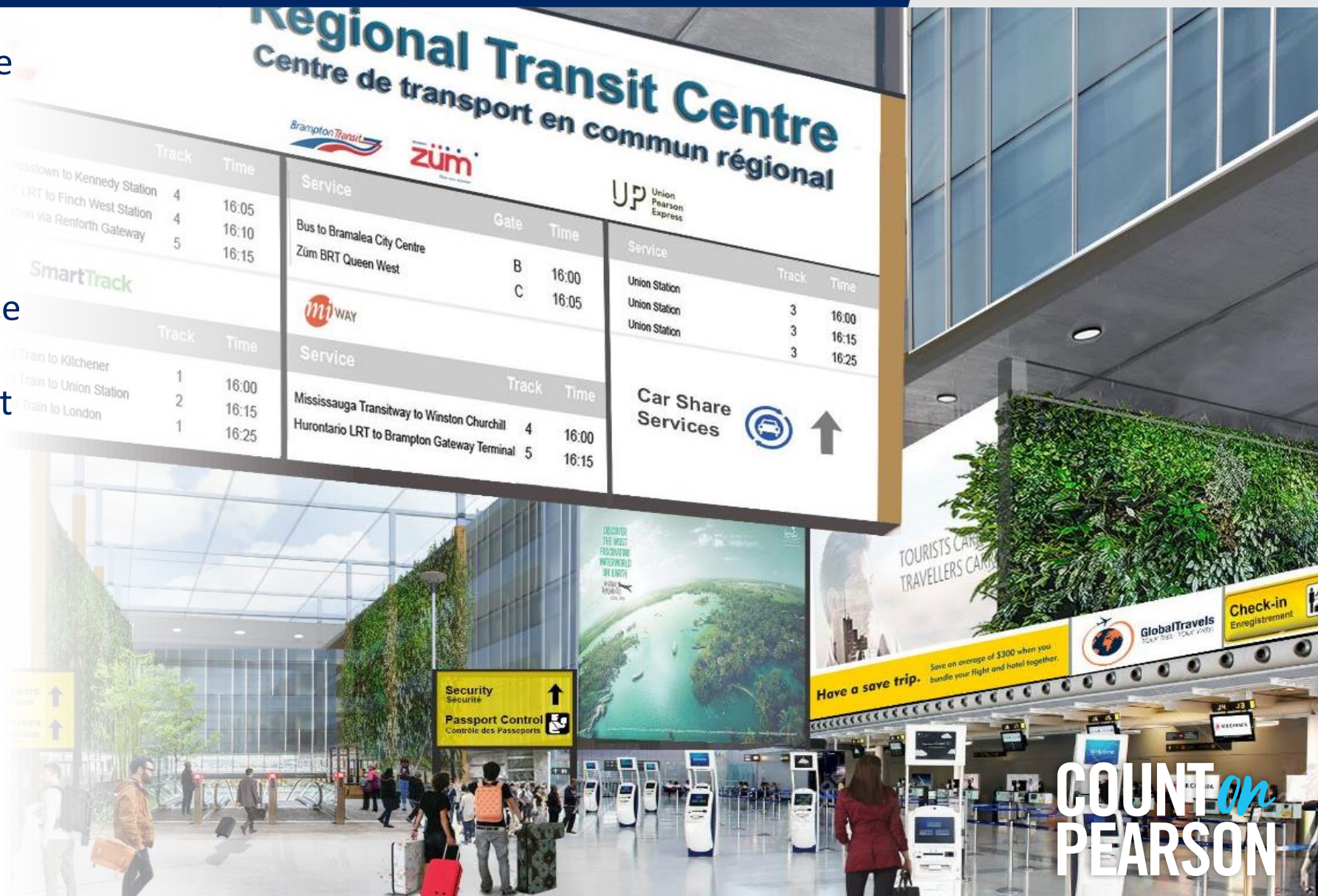
Government support for:

- Eglinton West LRT connection
- Finch LRT connection
- Capital improvements for better bus connections
- Kitchener GO Line bend
- Connection to the 407 transitway
- Improvements to Airport Road to facilitate access



Gaining momentum with “Union Station West”

- Toronto Region Board of Trade published report Jan 31 endorsing Union Station West as priority infrastructure
- Ontario Chamber of Commerce published paper Dec 2018 supporting Union Station West
- Regular planning coordination with federal and provincial officials
- Transit listening tables in Q1 2019





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

Count on Pearson to invest in community



Toronto Pearson

- In 2018, \$1,016,000 invested in 24 organizations across surrounding airport communities through **Propeller Project**, our **Community Investment Program**
- Uplift Fund and Nest Fund focused on addressing underemployment
- **Community Sponsorships:** Toronto Pearson sponsors and has a presence at your community events



COUNT on
PEARSON

COUNT *on* PEARSON

Thank you

