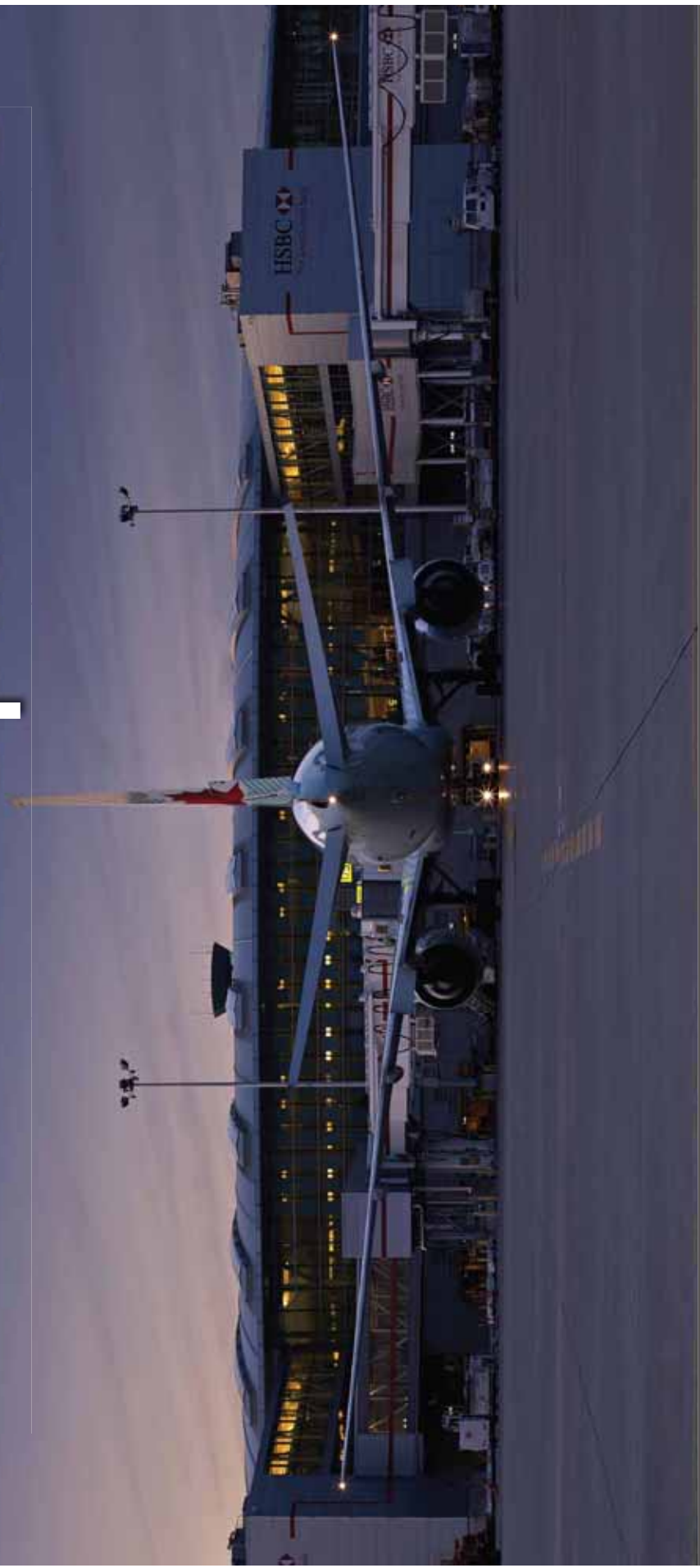


Welcome to the Toronto Pearson Night Flights Outreach Open House



Toronto Pearson

For You. The World.



Toronto Pearson Night Flights Outreach Open House

Please review our materials and speak with one of our Toronto Pearson team members.

Here, you will learn about:

- The New Toronto Pearson
- Airport 101
- Our Noise Management Program
- Night Flights – evolving to meet demand
- Our Environmental Stewardship
- Community Engagement
- Feedback & Next Steps



Toronto Pearson: For you. The World.

We are on a new course to clearly differentiate Toronto Pearson from our continental competitors by becoming North America's premier gateway airport.

Becoming a premier gateway airport means:

- Improving our services
- Finding new ways to delight our guests and airline customers

Did you know?

The multiple, vibrant colours in Toronto Pearson's new logo represent the cultural diversity of our Region – and the world to which the airport provides access. Together, the lines create a human figure that is embracing and reaching out to the world.



What's Next: North America's Premier Gateway Airport

Becoming a premier gateway airport also means:

- Better access for you and your neighbours to places across the globe for business and leisure travel
- Growth in connecting traffic at Toronto Pearson
- Efficient movement of goods around the globe
- Jobs and economic opportunities
- Support and promote tourism

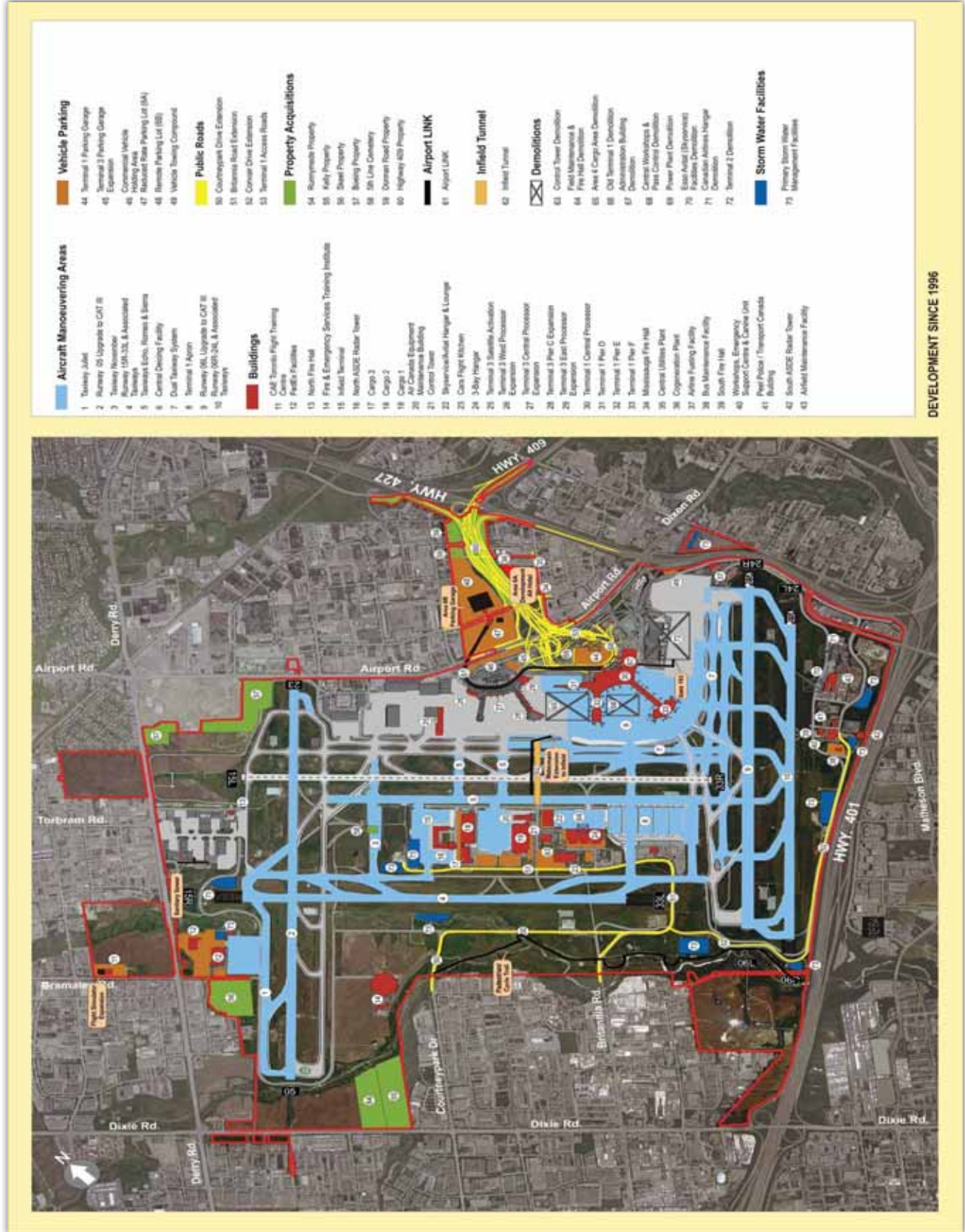


Airport 101 - Quick Facts

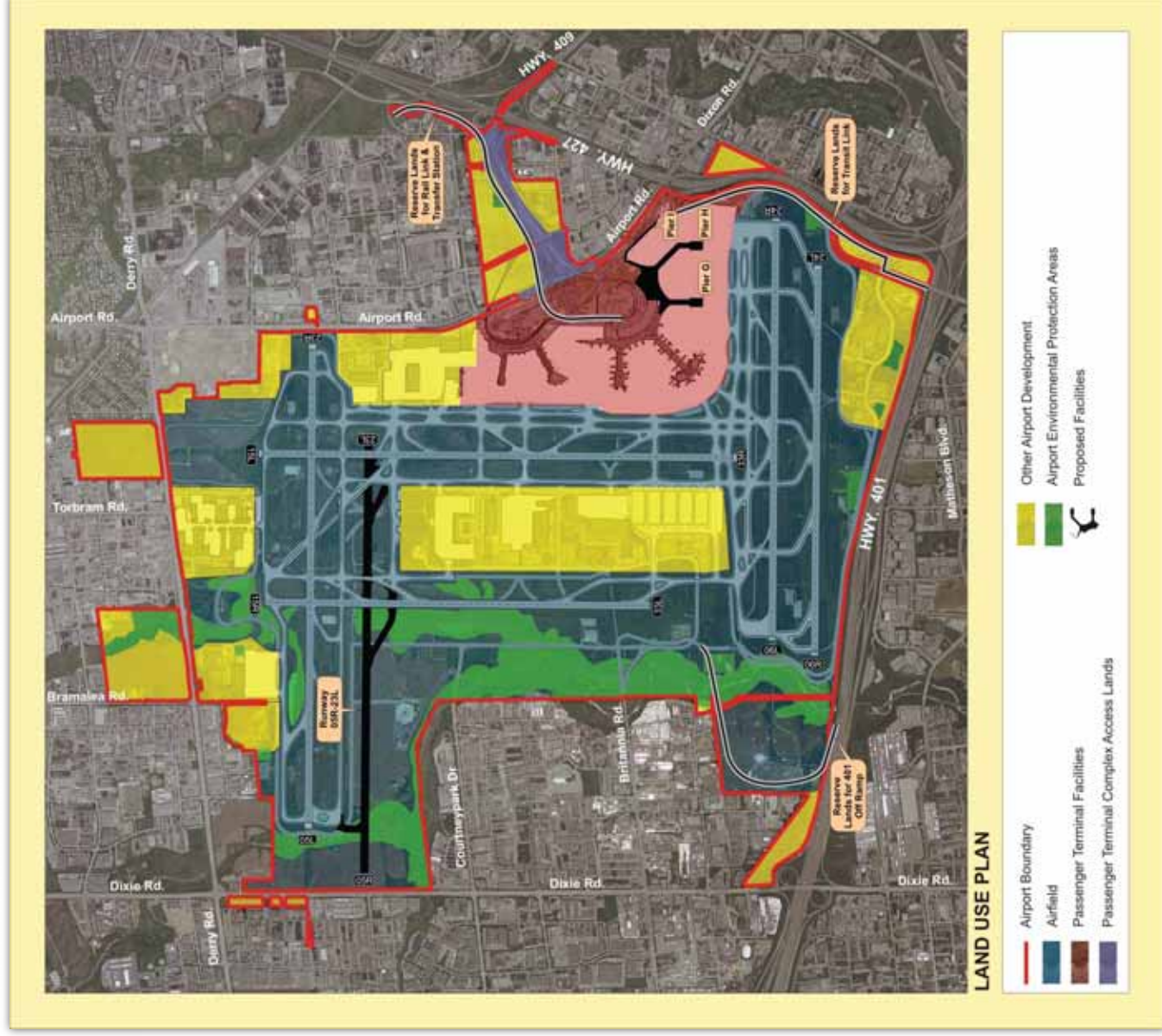
- 85,000 guests/day on 1,100 flights
- 32m guests in 2010, with a capacity for 38m
- More than 180 destinations worldwide
- 33% of Canada's total passenger traffic
- 50% of Canada's total air cargo
- 185,000 jobs are connected to the airport
- 5th largest entry point into North America



Airport 101 - Developing Your Airport What We've Done



Airport 101 - Developing Your Airport: What's Next



Airport 101 - Toronto Pearson Regional Economic Player

Toronto Pearson is a major economic enabler that drives prosperity and supports jobs:

- \$26.4 billion in revenue
- \$6.8 billion in employment income

The anchor organization of the largest employment area in Ontario:

- 38,000 employees work at Toronto Pearson
- 185,000 jobs supported by the airport

GTA 'Buy-Local' Program invests \$500 million in local businesses

Visitors to the GTA support 224,000 jobs in tourism and related industries

Did you know?

The addition of just one additional daily flight can create up to 100 new jobs in the community in the course of a year.



Noise Management Program

We regularly engage with our neighbours and community:

- Operate a noise management office
- Community Environment & Noise Advisory Committee (CENAC)
- Host activities to build awareness and understanding

We work to mitigate the noise impacts on communities:

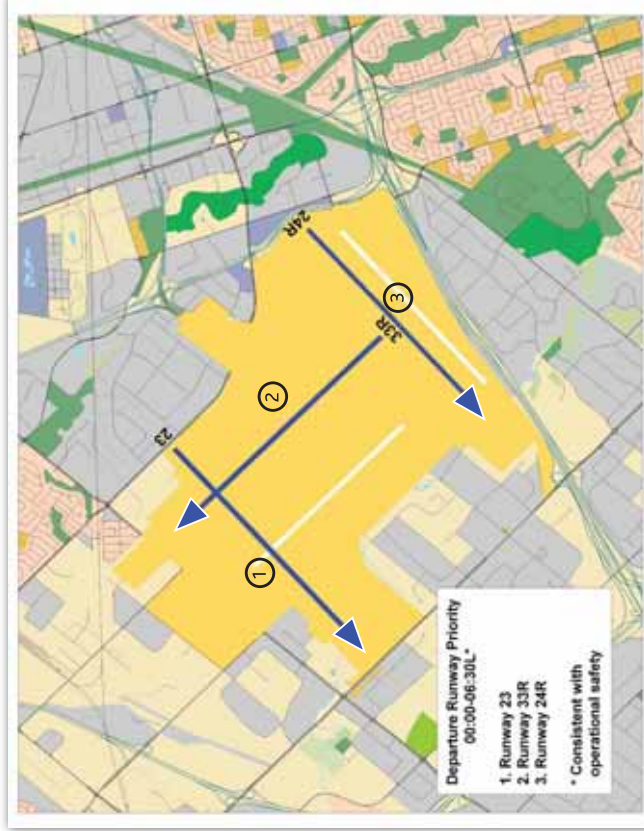
- Arrival and departure procedures
- Preferential runway assignment
- Supporting the use of quieter aircraft
- Restricted Hours Operating policy



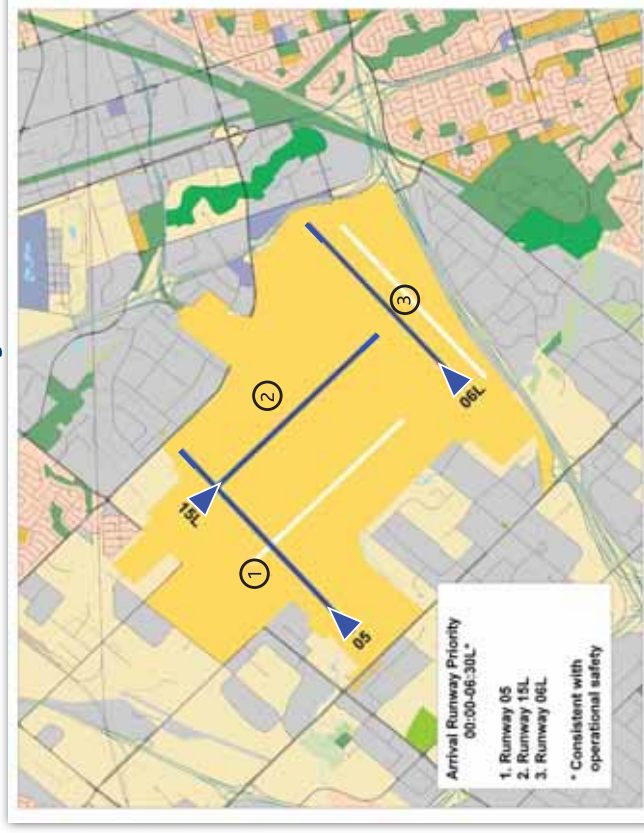
Noise Management Program: Preferential Runway Assignment

- Used to minimize impacts on residential neighbourhoods
- 12:00 a.m. to 6:30 a.m.
- Can vary based on wind and weather conditions, construction or safety

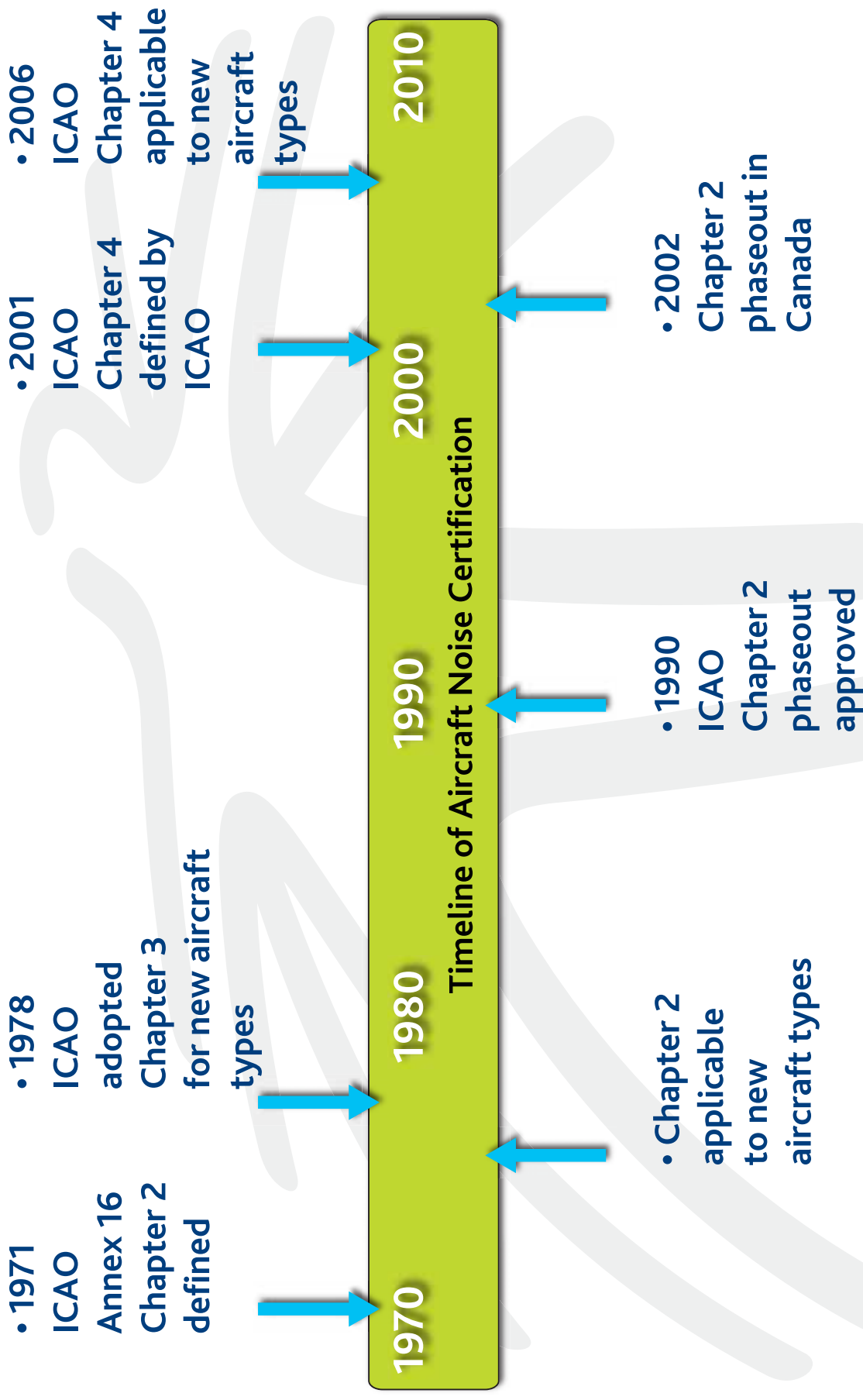
Preferred Departures Runways



Preferred Arrivals Runways



Noise Management Program: Supporting Use of Quieter Aircraft



Noise Management Program: Night Flight Budget

- Set by Transport Canada in 1997
- Caps the number of annual flights permitted during the night hours (00:30 – 06:30)
- On average, approx. 36 flights/night (2011) - 3% of total
- Cap increases based on percentage growth in passenger traffic
- Only airport in Canada with a cap
- North American competitor airports not capped



Night Flights: Evolving to Meet Market Needs

There are a number of factors driving increased need for flights at night:

- The needs of the GTA's ethnically diverse population and the growing demand for travel to emerging markets
- Strength and growth of the Toronto Region
- Growth of connecting traffic at Toronto Pearson
- New aircraft technologies that have transformed one-stop journeys into non-stop, changing how and when people and goods are moving around the globe
- The demand for sun destination travel
- Partnerships and alliances between air carriers are changing flight and connection options



Night Flights: Growing Demand

We are operating a different airport in a different community than we were when the cap was established 15 years ago. The budget has not kept pace with today's realities of a global economy.

- Long-term forecasts show a gap between the demand for nighttime activity and the cap set by Transport Canada
- Currently, Toronto Pearson cannot accommodate the future demand for night flights that is expected

Did you know?

Most night flights are not overflow from daytime operations – they are flights that because of travel distance, scheduling requirements or product delivery timelines need to arrive or depart at night. The other night flight slots are reserved for day-of requests, such as flights impacted by weather.

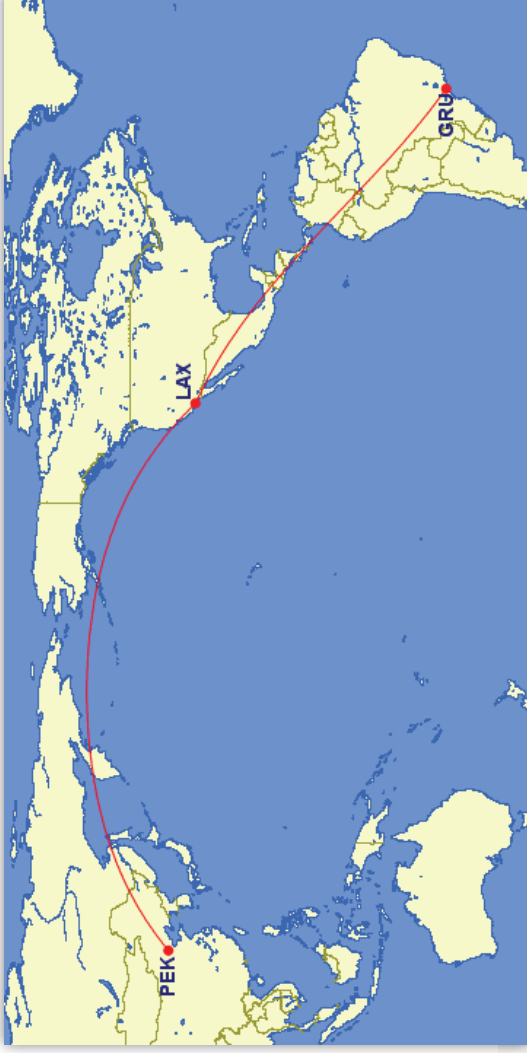


Night Flights: Geographic Location

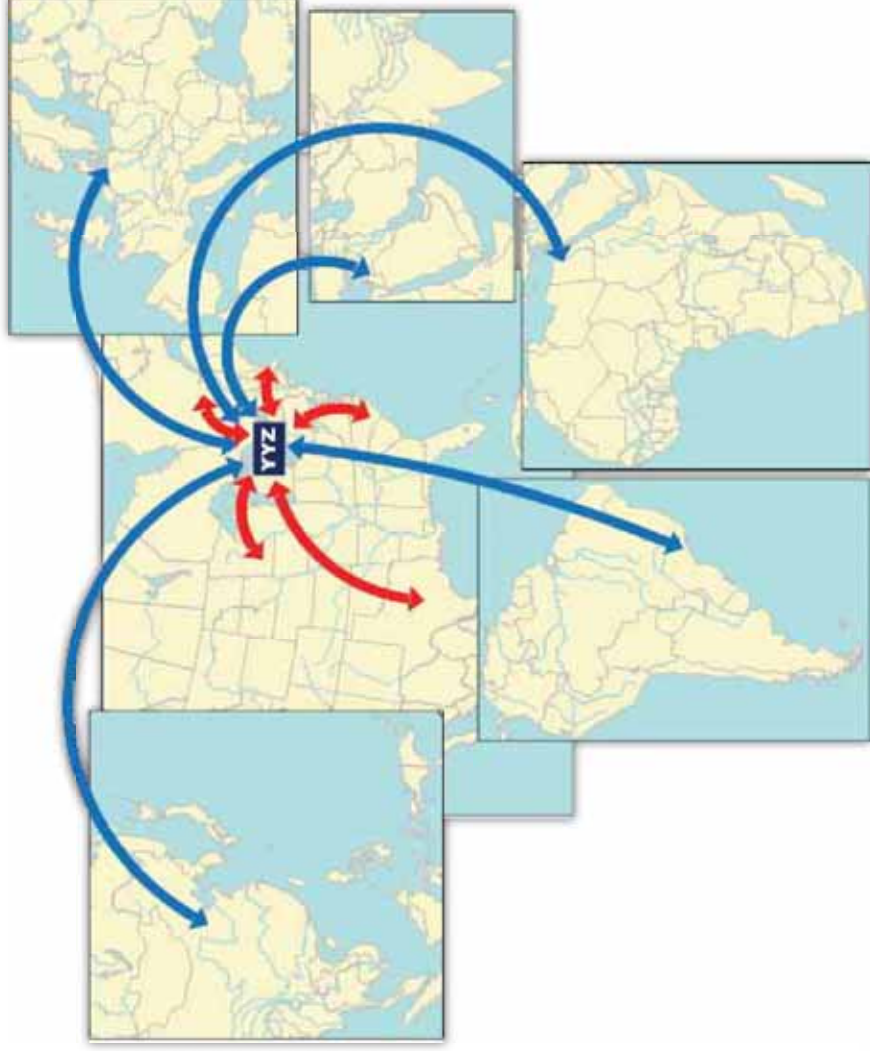
Case Study

Beijing to Sao Paulo via the following connections:

- **Via Los Angeles**
12,407 miles
- **Via Chicago**
11,801 miles
- **Via Toronto**
11,653 miles



Night Flights: Average Growth Rates: 2011-2025



Region	Growth
YYZ → Asia	12.2%
YYZ → Africa	+100%*
YYZ → Middle East	15.5%
YYZ → Caribbean	7.9%
YYZ → Europe	10.0%
YYZ → South America	7.6%
YYZ → U.S.	7.1%
YYZ → Domestic	3.5%
Overall	7.1%

*Toronto Pearson currently has no direct service to Africa

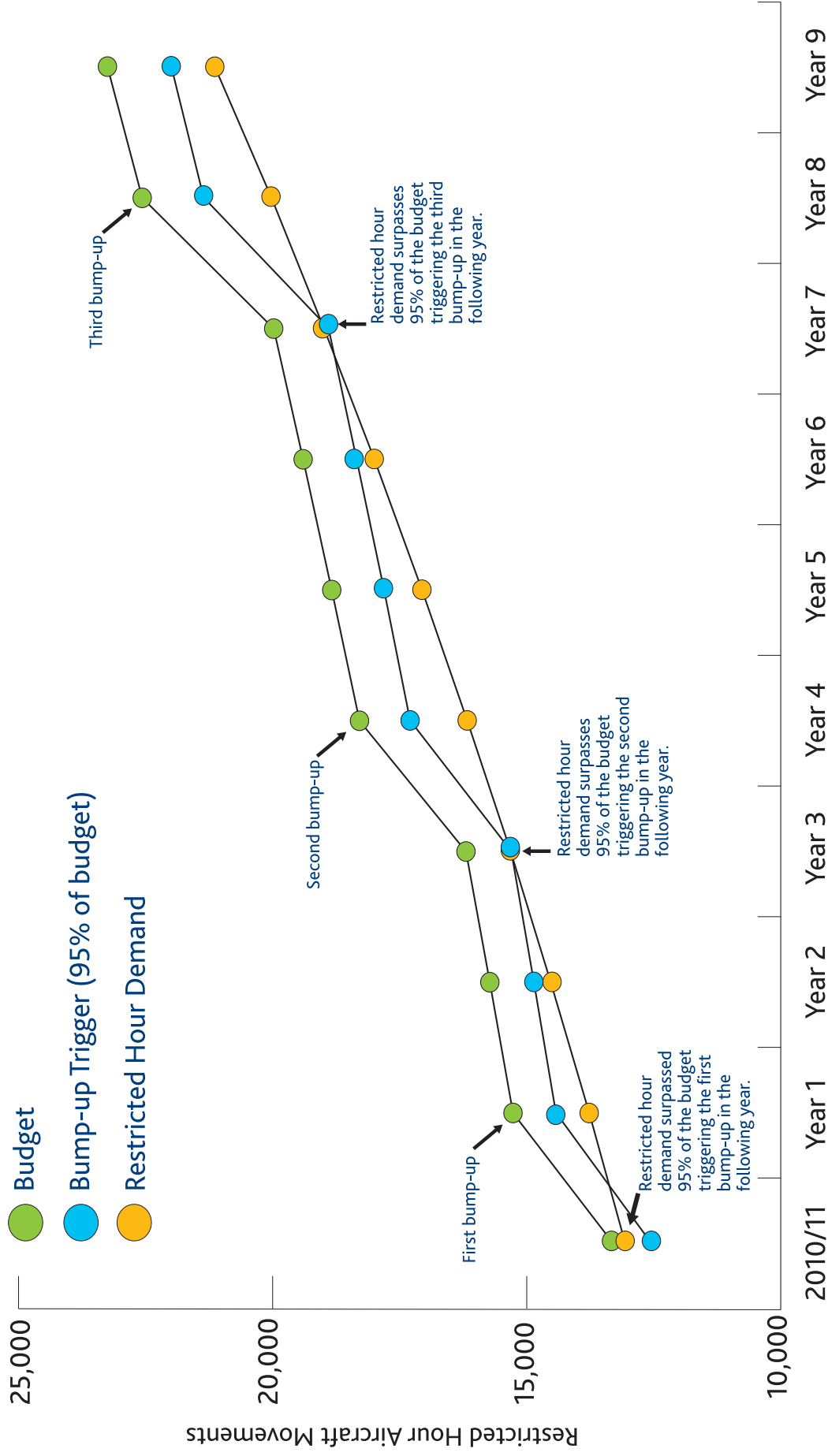


Night Flights: Our Proposal

- A modest increase to the budget that would be phased in as demand requires, starting in 2012
- Increases, or bump-ups, will occur in phases, triggered by actual demand if/when demand materializes
- Our current forecasts suggest we would need three modest bump-ups over the next 15 years to meet the needs of our guests, airline partners, surrounding business community and the GTA
- Increases as a result of overall passenger traffic growth would continue



Night Flights: Proposed Phasing Approach



Existing vs. Proposed Night Cap

(Assuming bump-ups are triggered in the next 3 years)

Year	Status Quo		Three Bump-Ups	
	Annual	Daily Number of Night Flights	Annual	Daily Number of Night Flights
2011	13,200/year	36/night		
2012	13,900/year	38/night	15,200/year	42/night
2013	14,400/year	40/night	17,300/year	47/night
2014	15,000/year	41/night	19,700/year	54/night
2015 - onward*	Growth based on passenger traffic only			

* Assumed 3-5% natural growth (~2 additional flights per night per year)



Night Flights Outreach: Next Steps

There are lots of ways to join in on the discussion:

- Open House – please fill out a feedback form
- Review materials on our website and be sure to sign up for our regular email updates at www.TorontoPearson.com/Community
- Email us at Community.Engagement@GTAA.com
- Call us at (416)776-5739

Please send us your comments on our Night Flights Outreach before December 5, 2011.



Community Engagement: Going Forward

- We want to be a good neighbour and we want to make sure you know what we're doing
- Talking with our neighbours about our request to update our night flights budget is the start of a bigger commitment we're making to build stronger relationships with the communities where we live and operate
- This is just the beginning. We hope you'll join us on the journey to become North America's premier gateway airport

