

Toronto Resident Survey: *Billy Bishop Toronto Centre Airport*

Prepared for The City of Toronto



ENVIRONICS
R E S E A R C H G R O U P

Summary

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- Most Torontonians are aware that the City is considering whether or not to allow jet aircraft at Billy Bishop Toronto City Airport (BBTCA), though residents are less engaged with this issue than with the Casino debate that took place earlier in the year.
- Residents are evenly divided between support and opposition for the expansion of the airport and use of jet aircraft.
- Those who live in the former City of Toronto, particularly those in the vicinity of the airport, present the strongest opposition to the use of jets. They are also more likely to say that the airport does not fit with the waterfront, and that major cities do not need an airport close to the downtown core.
- Noise AND environmental concerns drive opposition to the use of jet aircraft.
 - Noise is the number one top-of-mind (unaided) reason for opposition to the use of jets. However, when asked to rank possible concerns (aided) about jets, worries about environmental impact lead the way.
 - Residents also believe environmental impact is the most important thing for Council to consider when deliberating on the airport's expansion and use of jet aircraft

Summary

- Convenience is the number one reason people support the use of jets.
- Providing residents greater information about how noise levels for planes are calculated, and how the new jets will differ from current turbo prop planes did little to change opinions regarding the use of jets at the airport.
- Increased traffic in the area surrounding the airport is also an issue, but residents feel their concerns can be alleviated with some form of dedicated public transit from the downtown core.

Methodology

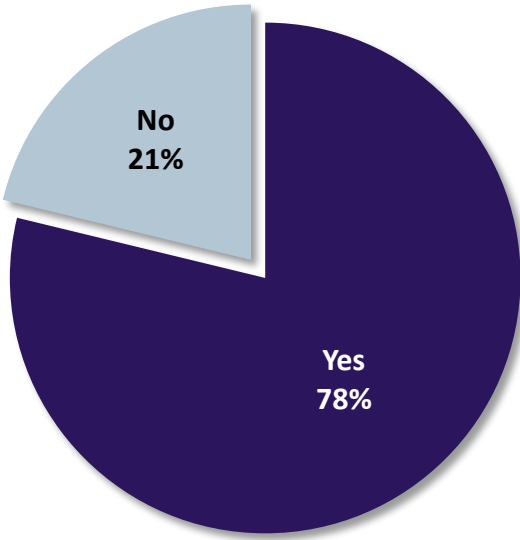
Methodology

- This report presents the results of a telephone survey conducted among 1,002 adult **Toronto residents** between August 26 and September 4, 2013. The margin of error for a sample of this size is plus or minus 3.1 percentage points (at the 95% confidence level).
- The sample consisted of 100 interviews each in **York** and **East York**, and 175 interviews each in **Scarborough, Etobicoke, North York** and the former **City of Toronto**.
- To ensure the views of residents closest to the airport are represented, an additional 100 interviews were conducted with those living in the immediate area (M5V and M5J FSAs, including 15 residents of the Toronto Islands).
- The data are statistically weighted to ensure the sample's regional, age and gender composition reflects that of the actual Toronto population according to the 2011 Census.
- Participants were asked a series of demographic questions including age, education and income to aid in analysis.
- In this report, results are expressed as percentages unless otherwise noted. Results may not add to 100% due to rounding or multiple responses. Net results cited in the text may not exactly match individual results shown in the charts due to rounding.
- All results are based on the entire sample of 1,002 residents unless otherwise noted.

Awareness and support

Most Torontonians are aware that the City is currently debating whether or not to allow jets at BBTCA

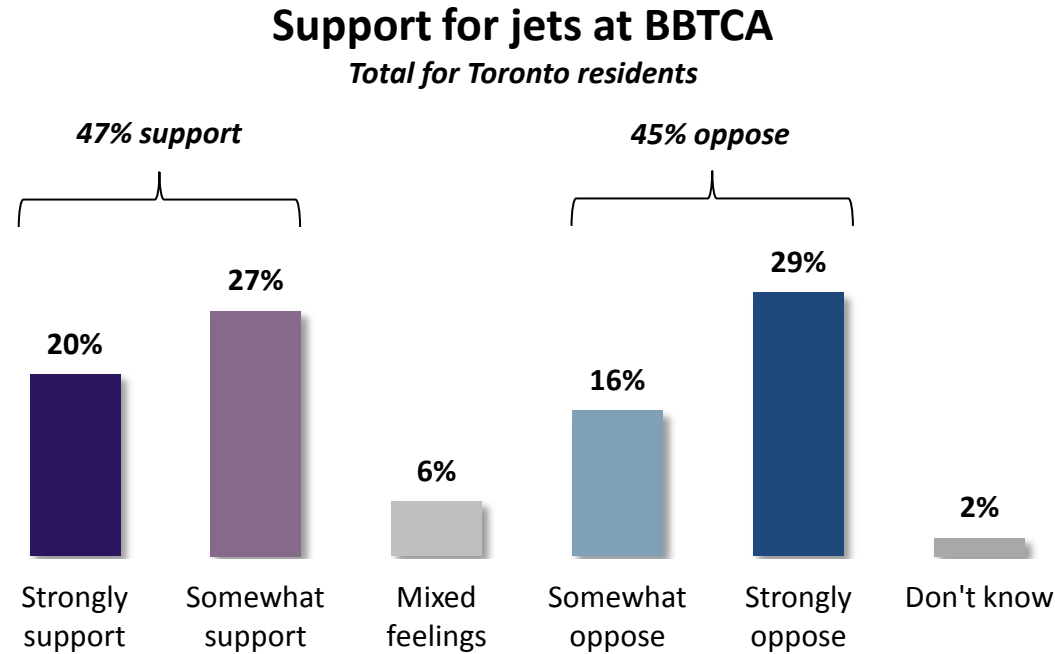
Awareness of BBTCA jet debate



Awareness of the jet aircraft debate is high across Toronto, as eight in ten (78%) have heard that the City is considering whether or not to allow jets at Billy Bishop Toronto City Airport. Awareness for this issue, however, is lower than what was seen during the casino debate, where 94 percent were aware the City was contemplating a decision. Residents of the former City of Toronto (89%), those with a post-graduate education (87%), and those aged 60 and older (90%) are the most likely to be aware of the debate.

Q1. Are you aware that the City of Toronto is considering whether or not to allow jet aircrafts at Billy Bishop Toronto City Airport, located on Toronto Islands?

Toronto residents are evenly split between support and opposition for jets at the Island airport



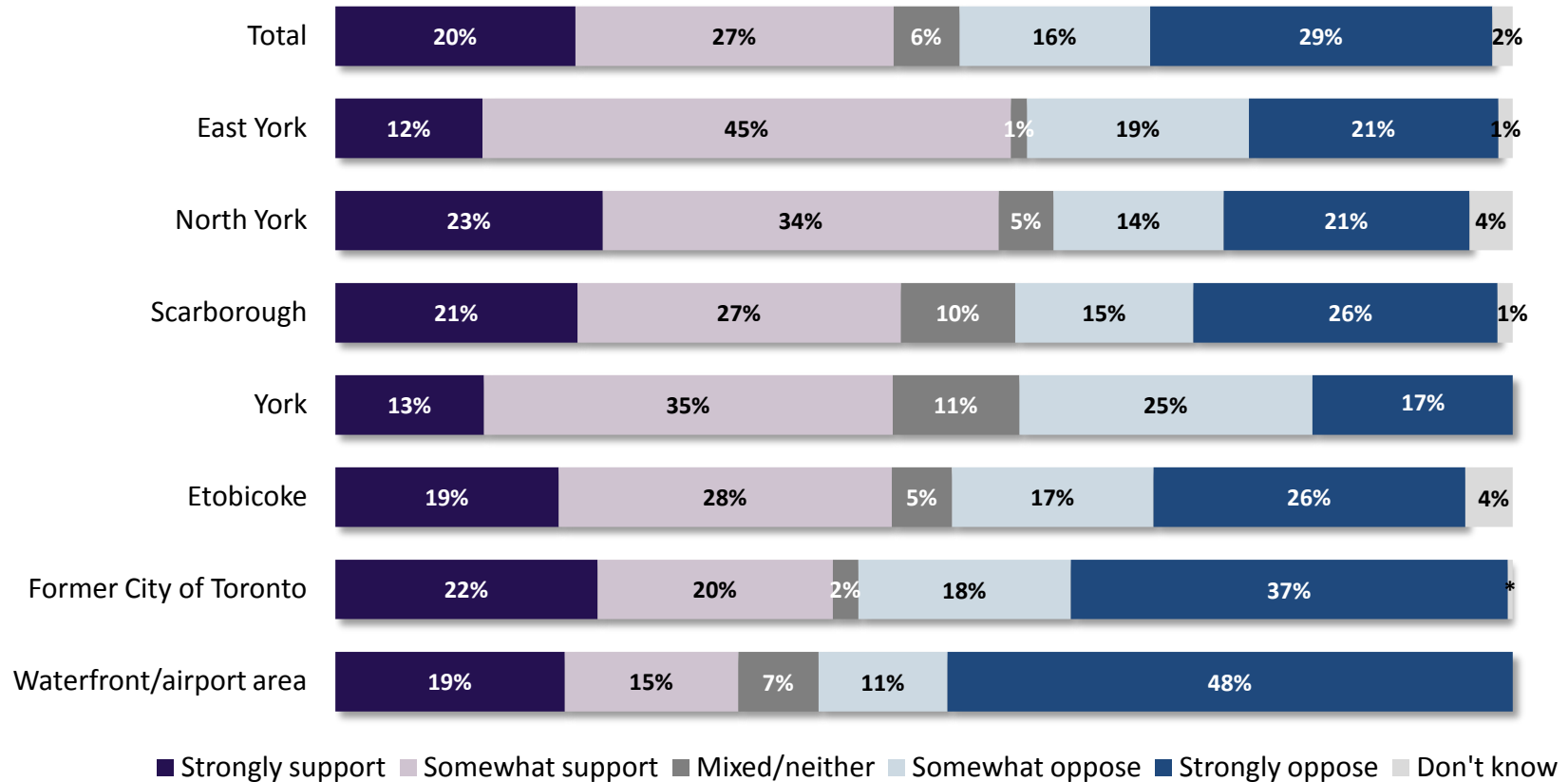
Toronto residents do not offer a clear preference, as they are divided between support (47%) and opposition (45%) for the expansion of BBTCA to allow jet aircraft. Those who oppose the use of jets are more likely to feel strongly (29%), while support is more tentative (27% somewhat support). One in ten residents (8%) have mixed feelings or are unsure of their position.

Residents of the former City of Toronto, and those who live in the vicinity of the airport show the strongest opposition (results by region are shown on the following page), while men (53%), those with an income of \$100,000 and over (59%), and those who have used the BBTCA in the past five years (63%) are the most likely to support the use of jets.

Q2. To what extent do you support or oppose the expansion of the airport to allow jet aircrafts?

Those who live closer to the airport are more likely to oppose expansion and the use of jet aircraft

Support for jets at BBTCA By region



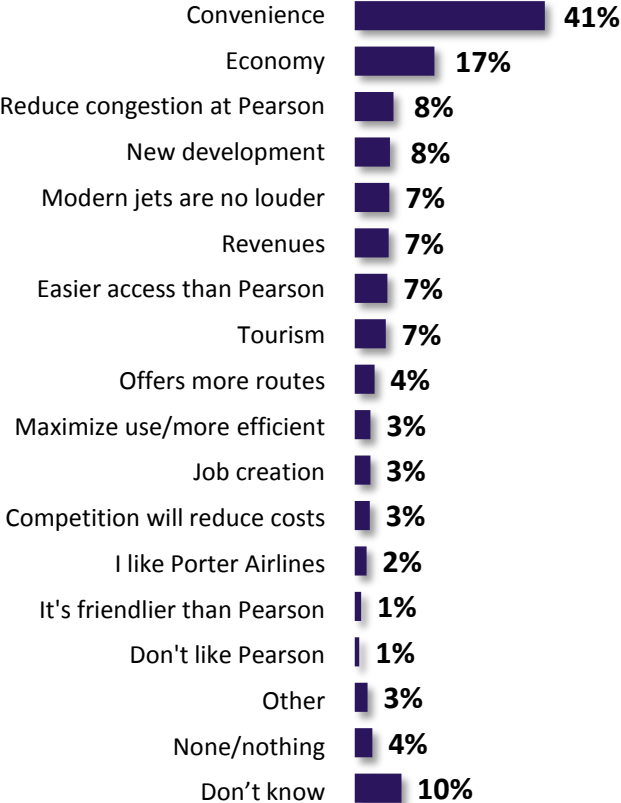
Q2. To what extent do you support or oppose the expansion of the airport to allow jet aircrafts?

* Less than 1%

Convenience is the number one reason for support, while opposition is driven by concerns about noise and the environment

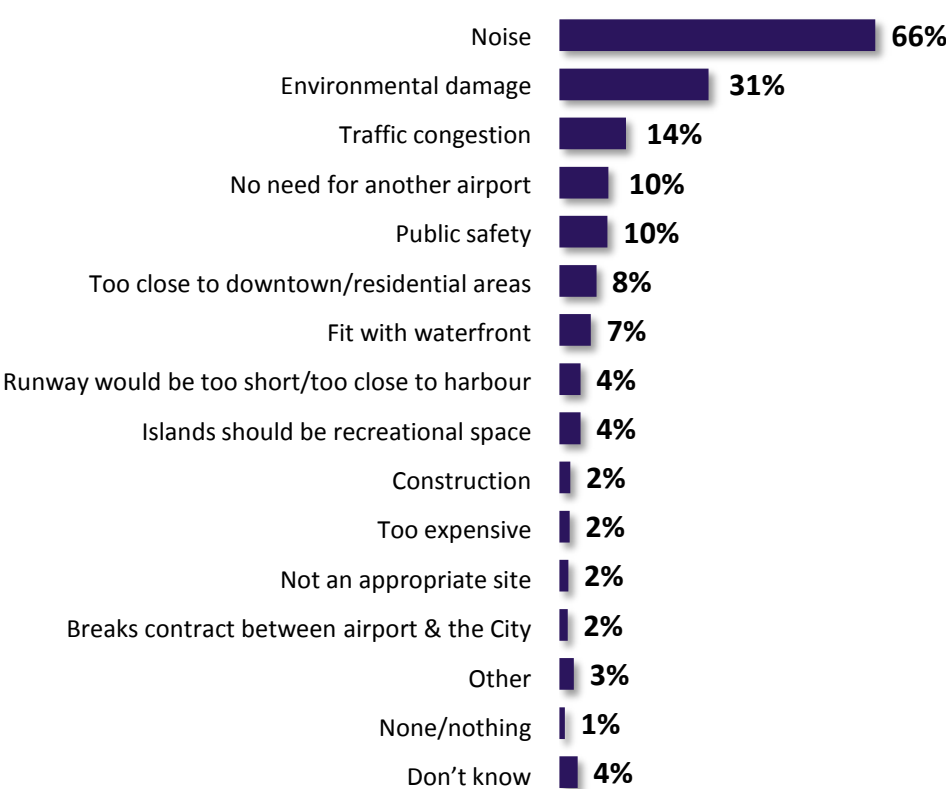
Reasons for support - unaided

Those who support jets



Reasons for opposition - unaided

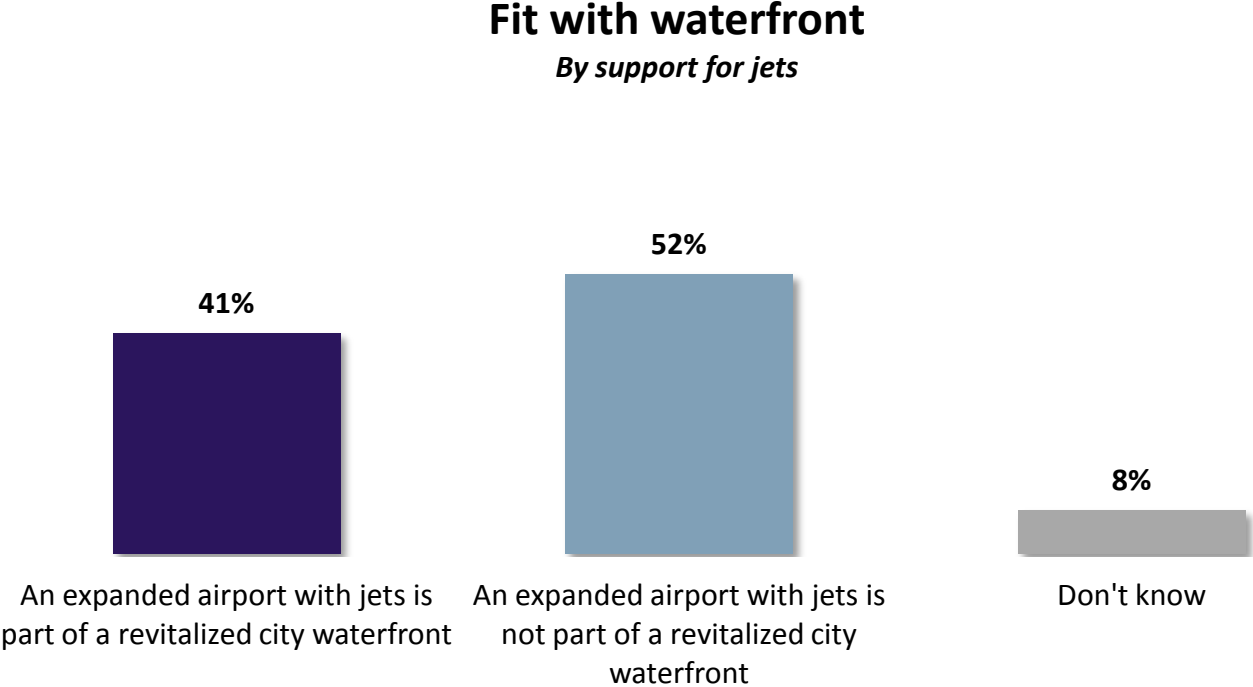
Those who oppose jets



Q3A. Why do you support the expansion of the airport to allow jet aircrafts? Subsample: Those who support the expansion of the airport (n=464)

Q3B. Why do you oppose the expansion of the airport to allow jet aircrafts? Subsample: Those who oppose the expansion of the airport (n=465)

Half of Torontonians say that an expanded airport with jets does not fit with the revitalized waterfront

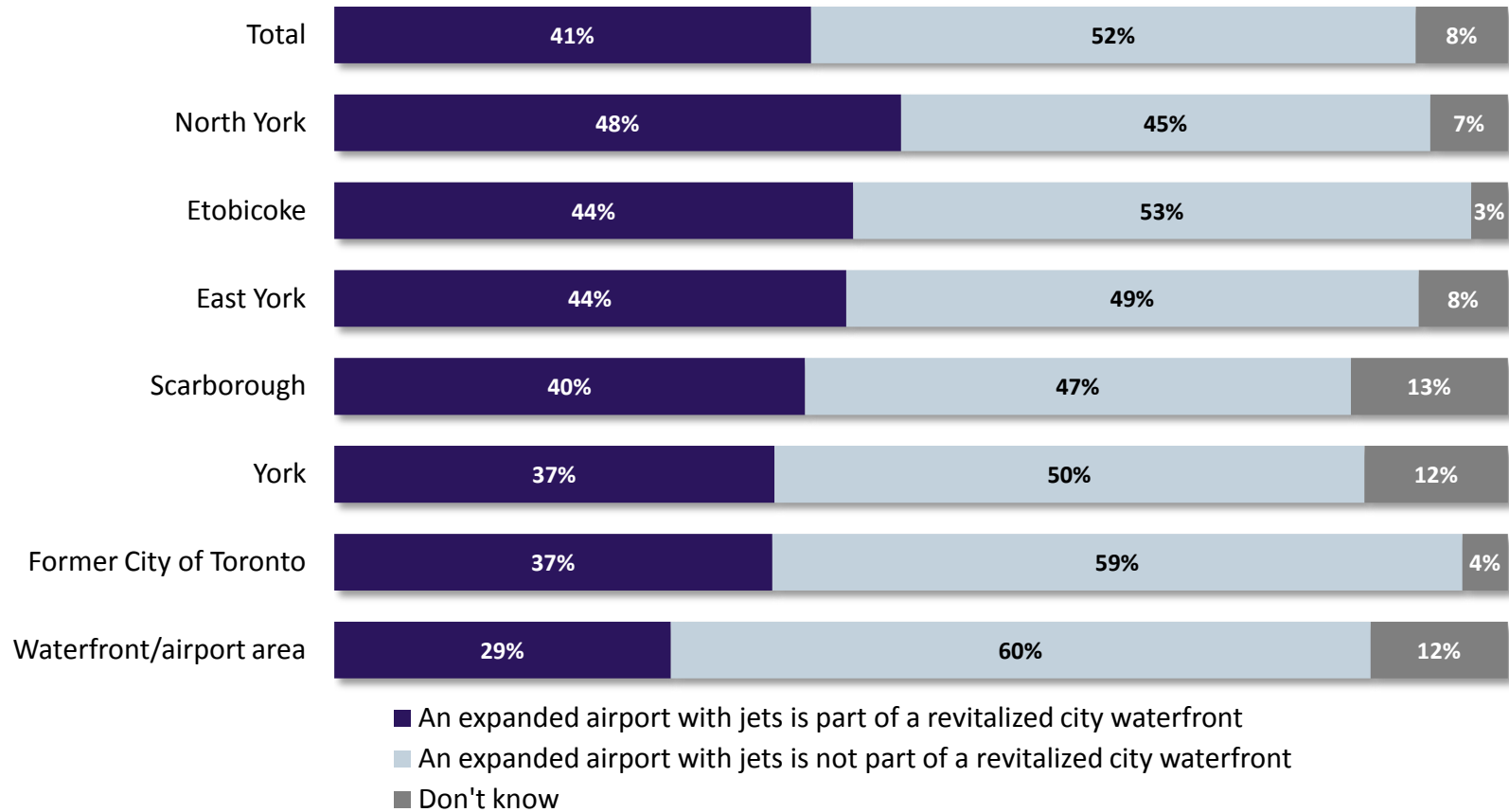


When asked to decide if an expanded airport can be part of the revitalized waterfront, half of residents (52%) say it cannot. Four in ten (41%) say it can be part of the waterfront, while an additional one in ten (8%) are undecided. Those who live closest to the waterfront are most likely to say that an expanded airport cannot be a part of a revitalized waterfront (shown on next slide). Of those residents who oppose jets at the airport, most (90%) say that they are not part of a revitalized city waterfront.

Q4. Which of the following statements is closer to your own opinion ...?

Toronto residents living in the waterfront area are most likely to say that the airport does not fit

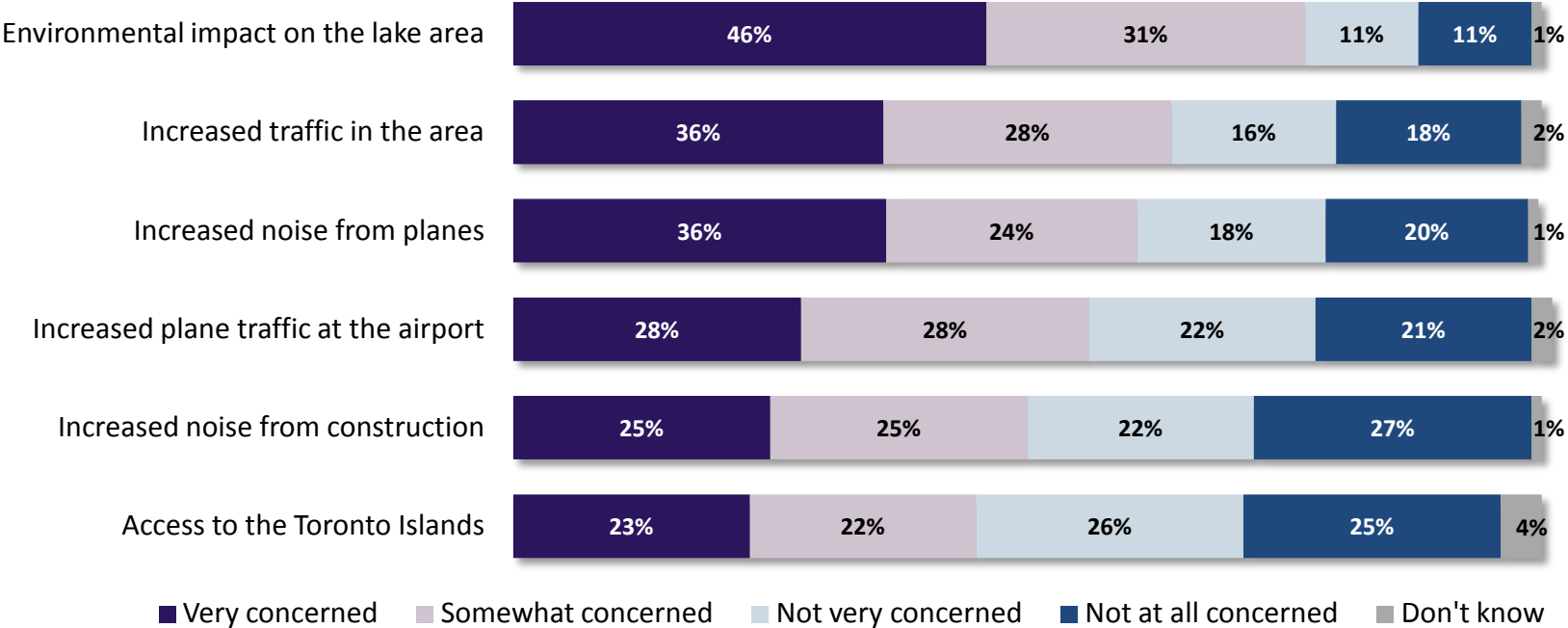
Fit with waterfront By region



Q4. Which of the following statements is closer to your own opinion ...?

Toronto residents are most concerned about the environmental impact on the lake and increased traffic in the area

Concern for impacts of airport expansion and jets

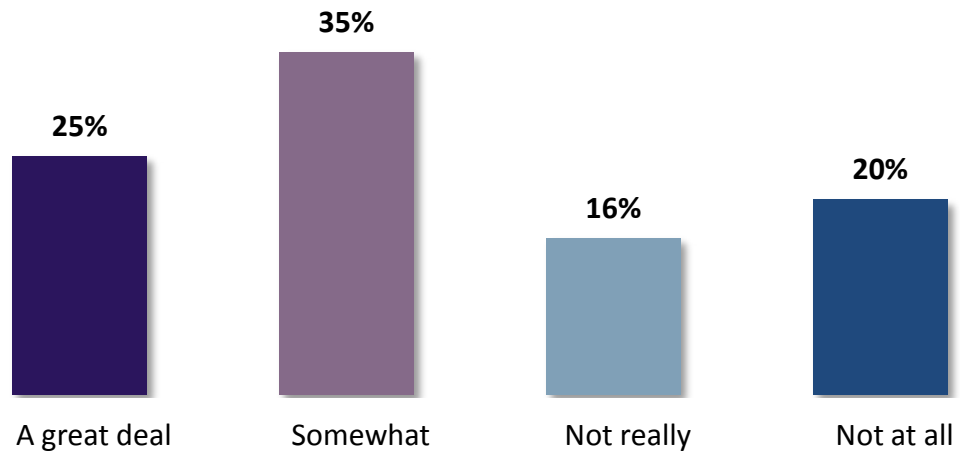


While noise is the main top-of-mind reason for residents’ opposition of the use of jets (Q3b, slide 11), when they are read a series of possible issues, residents are most concerned about the environmental impact that expansion will have on the lake and surrounding area (77% very or somewhat concerned). Torontonians also show greater concern about the increased traffic in the area (64%) than for the amount of noise made by jet aircraft (61%). Concern about the environment is similar throughout the City, while concerns about noise and traffic are greater in the airport vicinity.

Q5. Please tell me if you are very concerned, somewhat concerned, not very concerned or not at all concerned about the following ...

Dedicated public transit would alleviate some concerns about increased traffic surrounding the airport

Would dedicated public transit alleviate concerns about traffic *Those who are concerned about increased traffic*

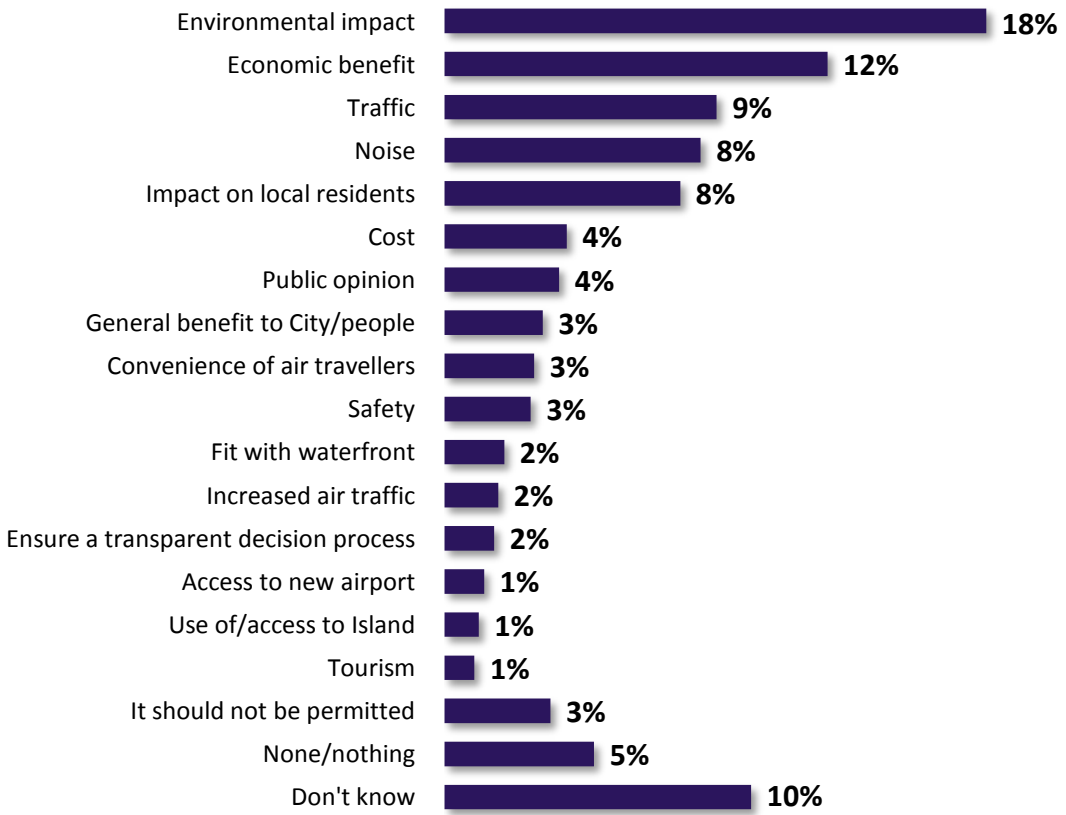


Among those Toronto residents who are concerned about increased traffic in the airport area, six in ten (60%) say that dedicated public transit from the downtown core to the airport would alleviate their concerns somewhat (35%) or a great deal (25%). Of those residents who live in the vicinity of the airport and are concerned about increased traffic, a majority (55%) say that dedicated transit does not alleviate their concerns.

Q6. Would dedicated public transportation from the downtown core to the airport alleviate your concerns about increased traffic in the area . . . ?
Subsample: Those who are concerned about traffic in the airport area (n=633)

The environmental impact, followed by the economic benefit, are what Toronto residents most want City councillors to consider when making a decision

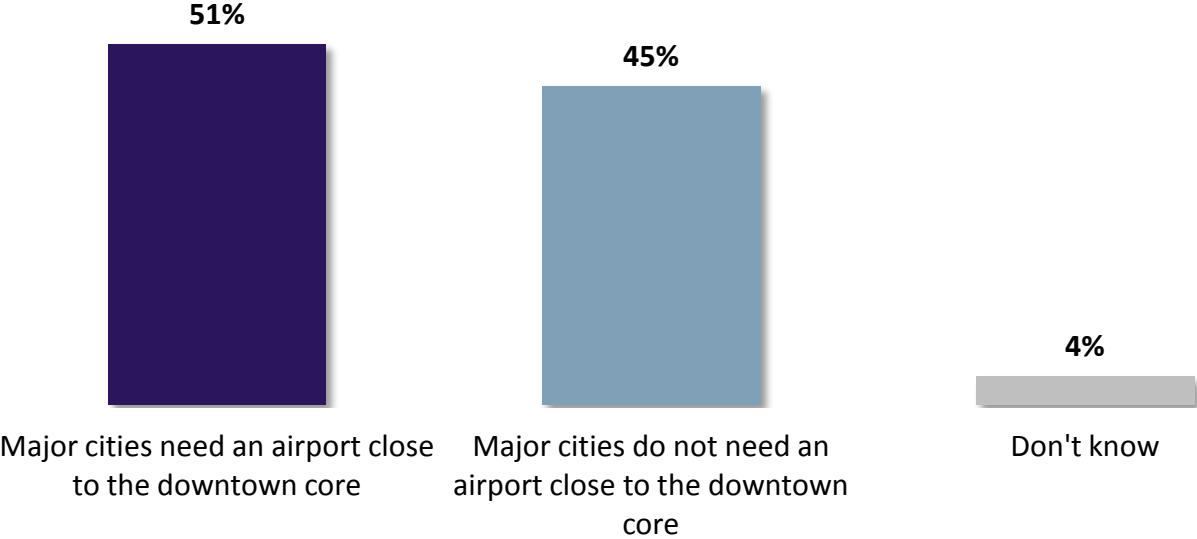
Most important consideration for City councillors - unaided



Q7. What, in your opinion, is the most important thing for City councillors to consider when deciding whether or not to support the expansion and use of jets at the airport?

Half of Toronto residents say that major cities need an airport close to their downtown core

Need for airport close to downtown core

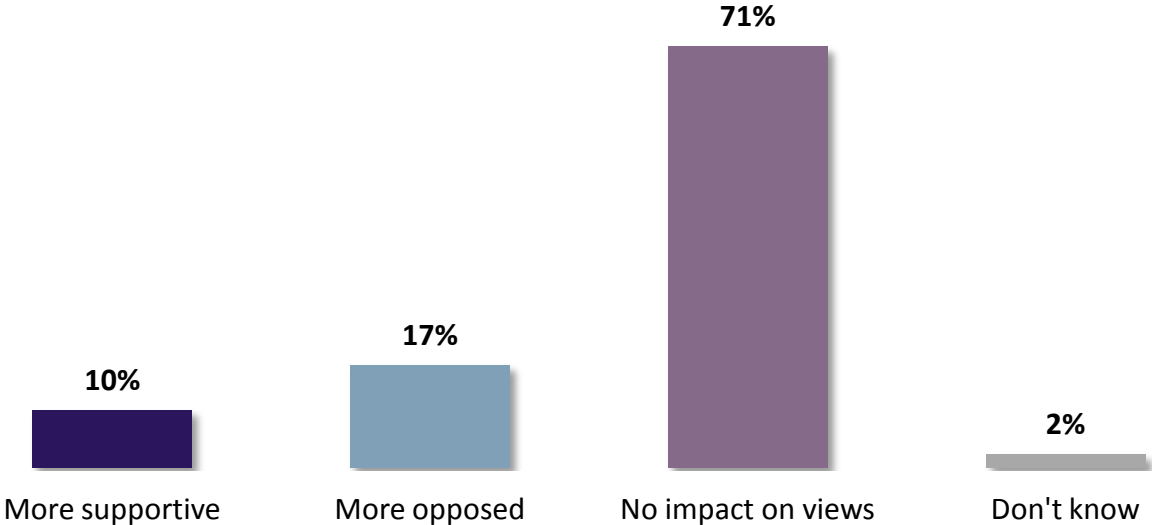


When asked if major cities need an airport close to the downtown core, half of residents (51%) say that they do. Users of the BBTCA (69%) are the most likely to say that an airport is needed close to the downtown core. In the former City of Toronto and the Island airport vicinity, residents are more likely to say that an airport is not needed close to downtown (52% each).

Q8. Which of the following statements is closer to your own opinion ...?

Providing Toronto residents more information about how noise levels will differ with jet aircraft does little to change support

Impact of noise levels on support



Toronto residents were provided an explanation of how the noise from aircraft is measured, and how the new jets will differ from current turbo prop planes used at the airport. After receiving this information, they were asked how it would impact their feelings about the use of jet aircraft. In general, this information did little to change opinions – seven in ten (71%) say it had no impact on their views – and only served to entrench views further.

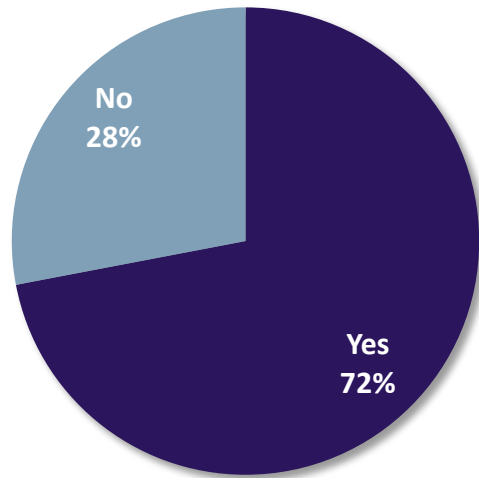
Current noise measurements for planes are based on the average amount of noise generated at three times: while landing, during takeoff and flyover. The average noise generated by the new jets is said to be similar to that of current turbo prop planes used at the airport. At certain times, such as during flyover, the new jets may be louder than current turbo prop planes, while quieter at other times, such as during takeoff.

Q9. Does this make you more supportive, more opposed or have no impact on your opinion towards allowing jets at the airport?

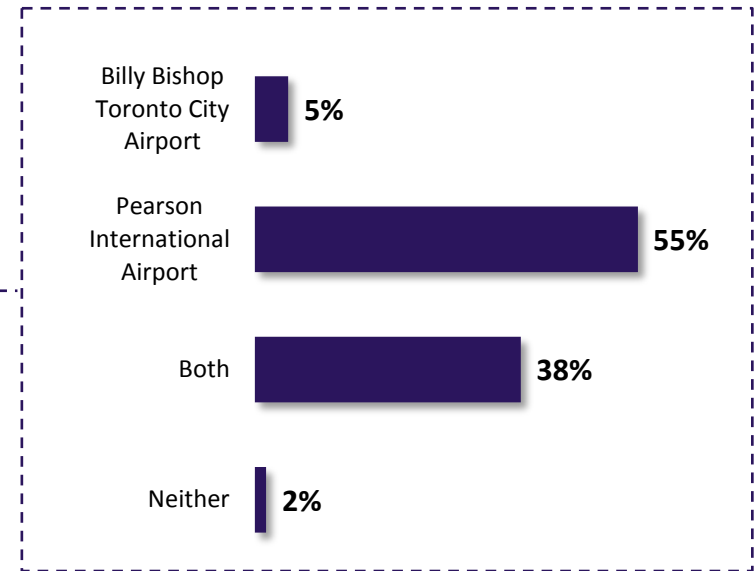
Use of Toronto airports

A large majority of Torontonians have used an area airport in the past five years, with most flying to or from Pearson

Used a Toronto airport in past five years?



Used a Toronto airport in past five years?



Seven in ten (72%) Toronto residents have used an area airport in the past five years, with most using only Pearson International (55% of airport users), or both Pearson and BBTCA (38%). Only five percent of residents have used Billy Bishop airport exclusively. Those who use only the BBTCA or both airports are more likely to reside in the former City of Toronto, have higher levels of education, be between the ages of 30 and 44, and have an annual income of \$100,000 or greater.

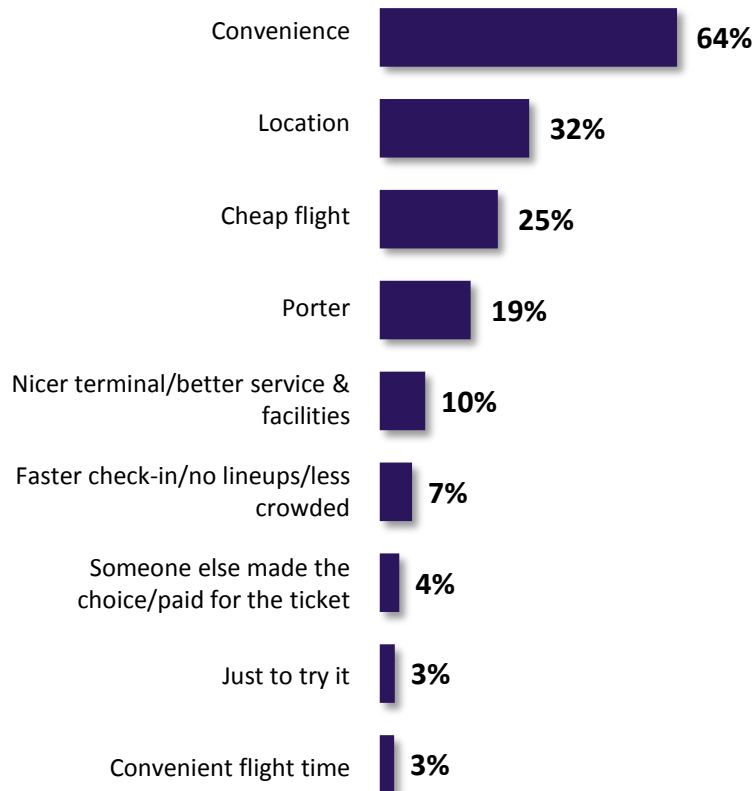
Q10. Have you flown to or from a Toronto area airport in the past five years?

Q11. Have you flown to or from ...? Subsample: Those who have used a Toronto airport in the past five years (n=705)

Convenience and location are the main reasons residents choose BBTCA; airport-specific destinations or airlines drive travellers to Pearson

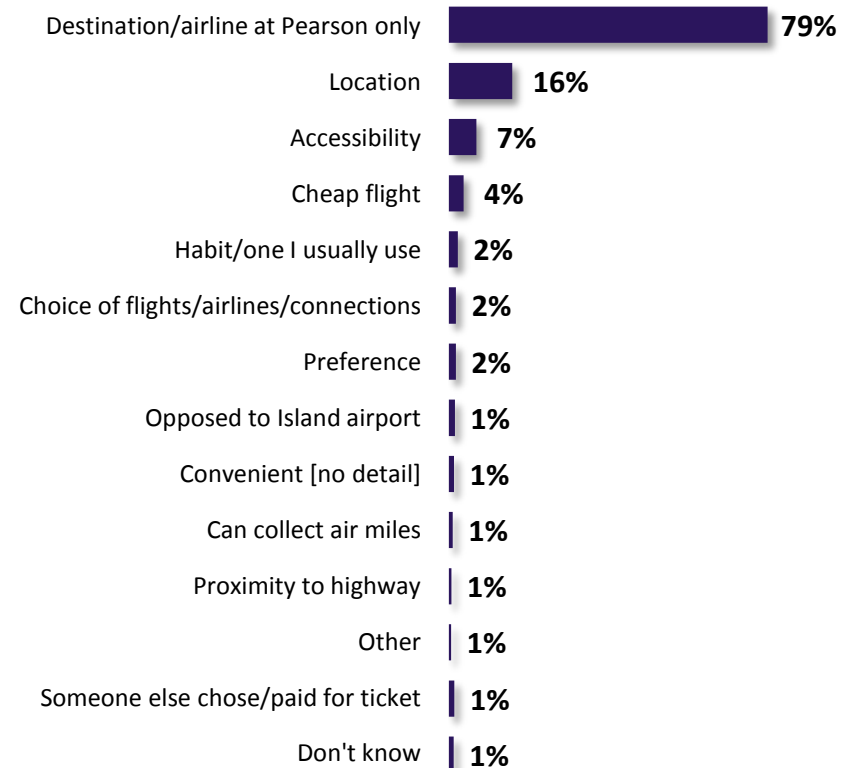
Reasons for using BBTCA - unaided

Those who use BBTCA



Reasons for using Pearson - unaided

Those who use Pearson



Q12. Why did you choose Billy Bishop Toronto City Airport? Subsample: Those who use BBTCA (n=292)

Q13. Why did you choose Pearson International Airport? Subsample: Those who use Pearson (n=664)



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