

Toronto's Global Hub Airport

Sustaining Growth & Delivering Economic Benefits





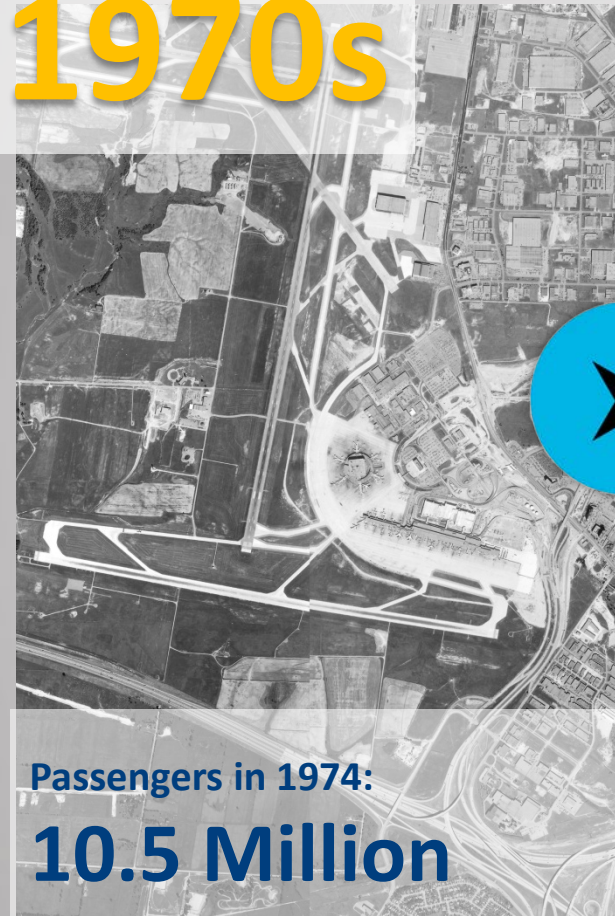
Our Vision for Toronto Pearson

To be the world's best airport: Making a difference, connecting the world.

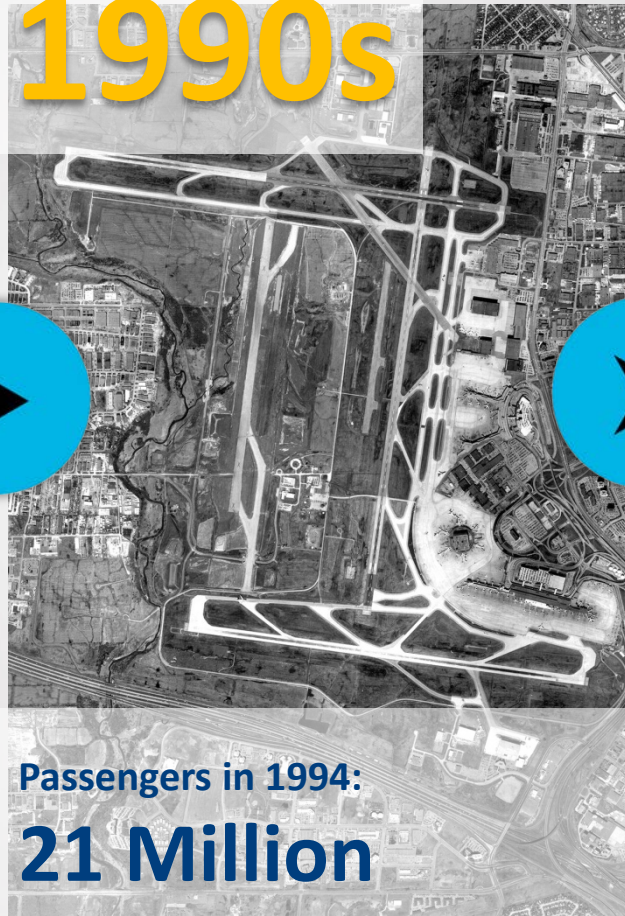
- 1. Growth as a global hub airport**
- 2. Strong financial position**
- 3. Good neighbor**

Toronto Pearson's Flight Path

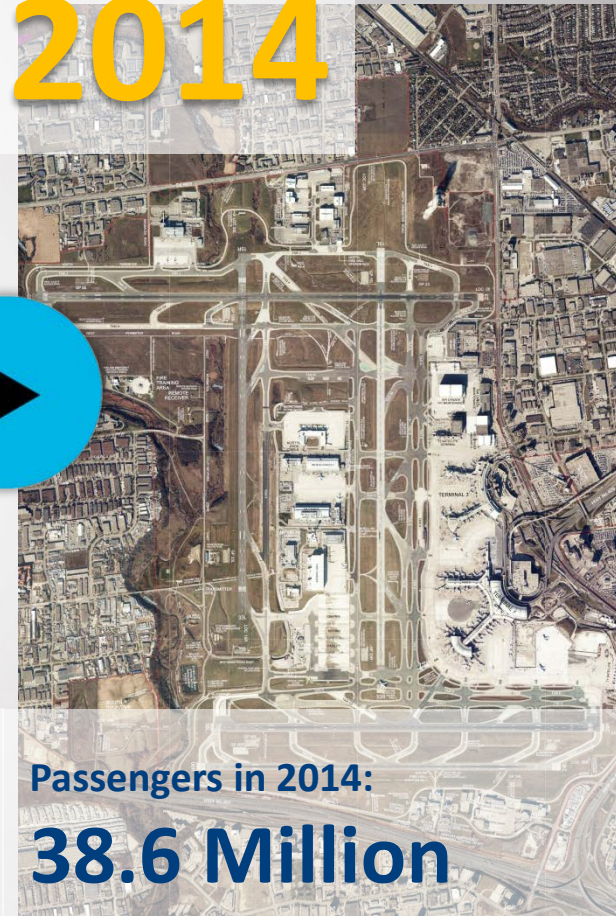
1970s



1990s



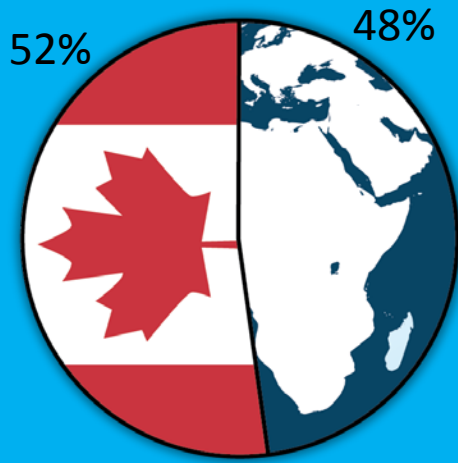
2014



North America's:
13th busiest airport for total passengers
2nd largest airport for international passengers

Toronto Pearson's Increasingly International Passenger Traffic

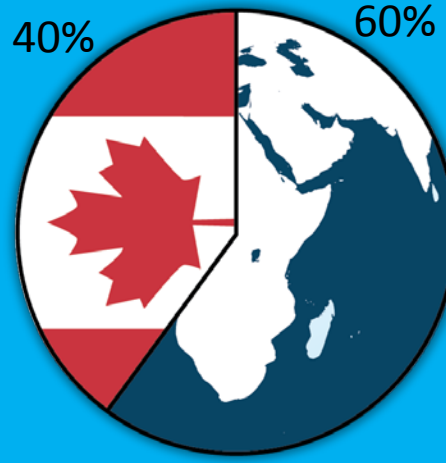
1985



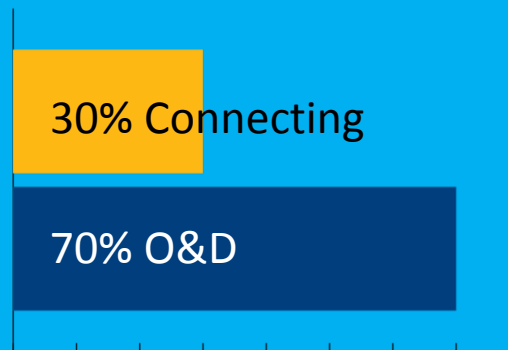
Total - 15.7M

Connecting and O&D Not available

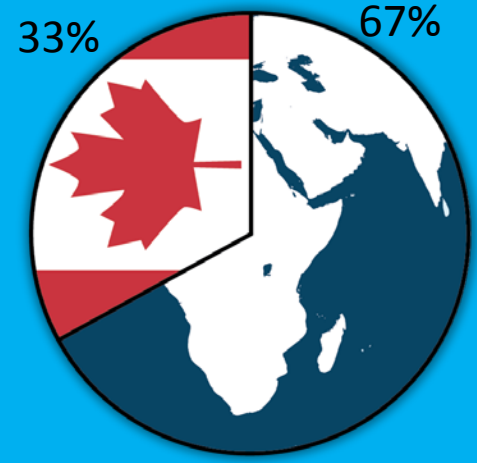
2014



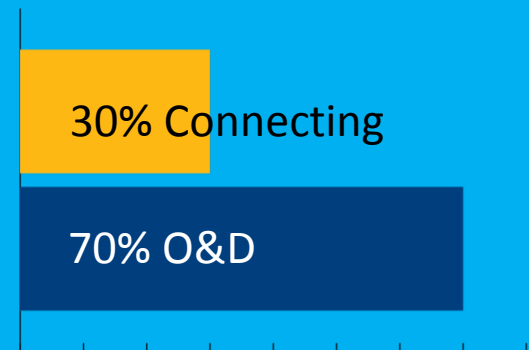
Total - 39M




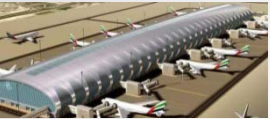





2033



Total - 64M



Toronto Pearson - an Increasingly Important Global Hub Airport

Airport		Passenger traffic, 2014, Millions		City population (M), 2014	
London Heathrow		68.1	73.4	8.6	
Dubai International		69.1	70.5	2.3	
Charles de Gaulle		58.6	63.8	2.3	
Singapore Change		54.1	54.1	5.5	
John F. Kennedy International		28.5	53.2	8.4	
Toronto Pearson International		23.3	38.6	2.9	
Chicago O'Hare International		10.8	70.1	2.7	

Source: ACI statistics.

Toronto Pearson's Economic Impact

Today

\$35.4B

5.6% OF THE ONTARIO GDP

277,000

JOBS FACILITATED ACROSS ONTARIO

2030

\$62.1B

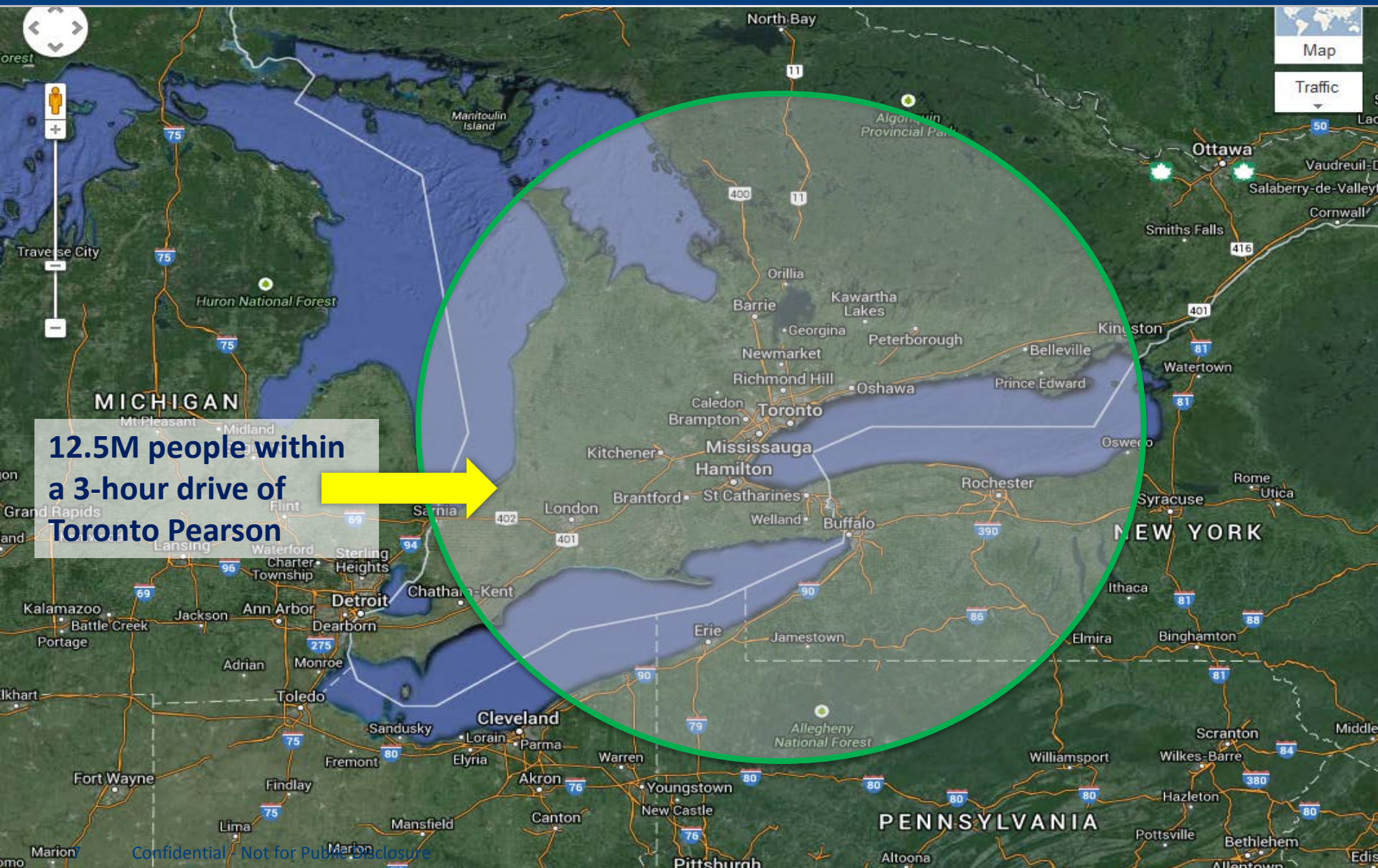
6.6% OF THE ONTARIO GDP

478,000

JOBS FACILITATED ACROSS ONTARIO



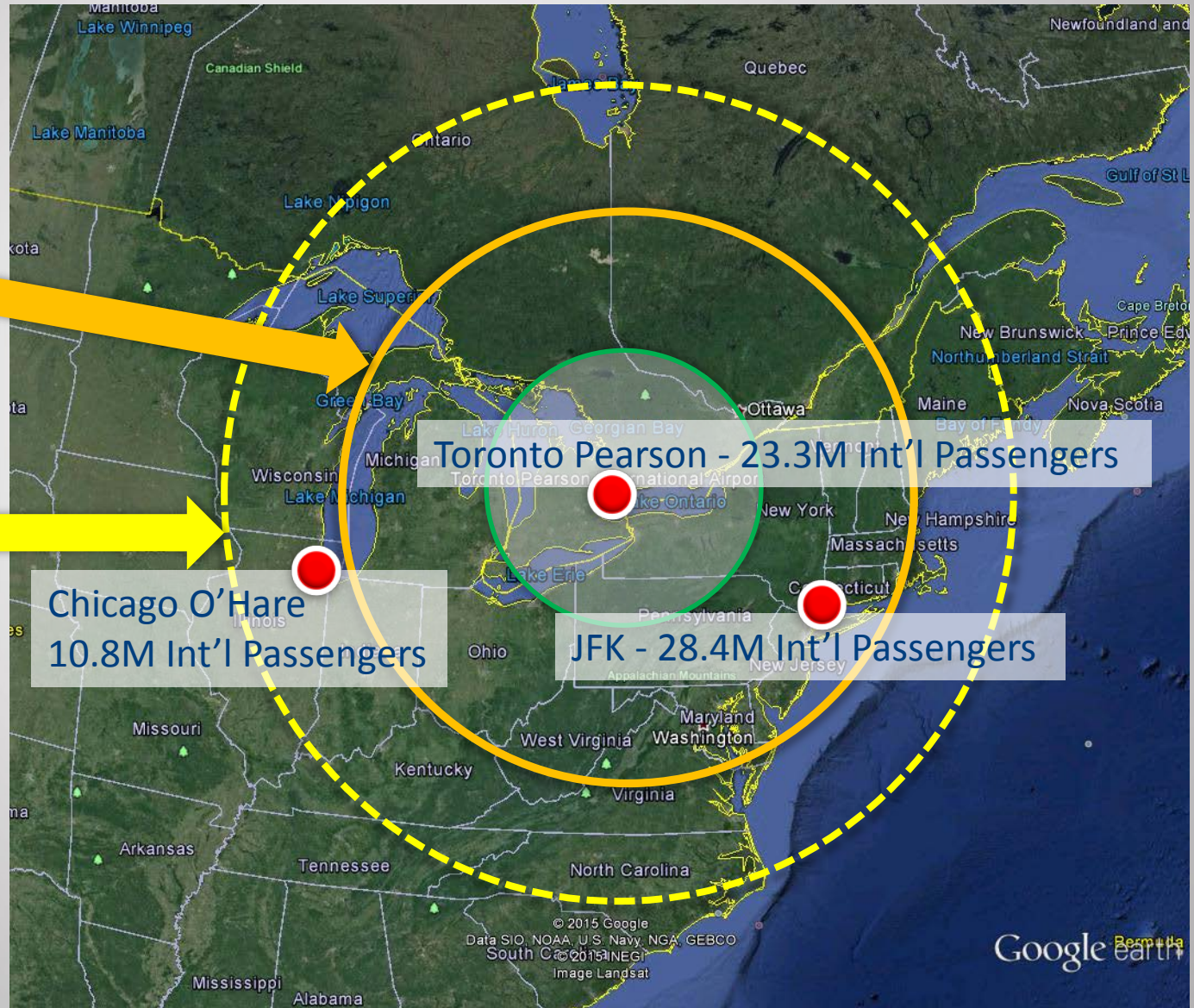
What's driving our growth? Regional Demand



And also from the Mega-Region

150M people
within a 90-
minute flight of
Toronto
Pearson

Additional
50M people
(total of 200M)
within a 2-hour
flight of
Toronto
Pearson

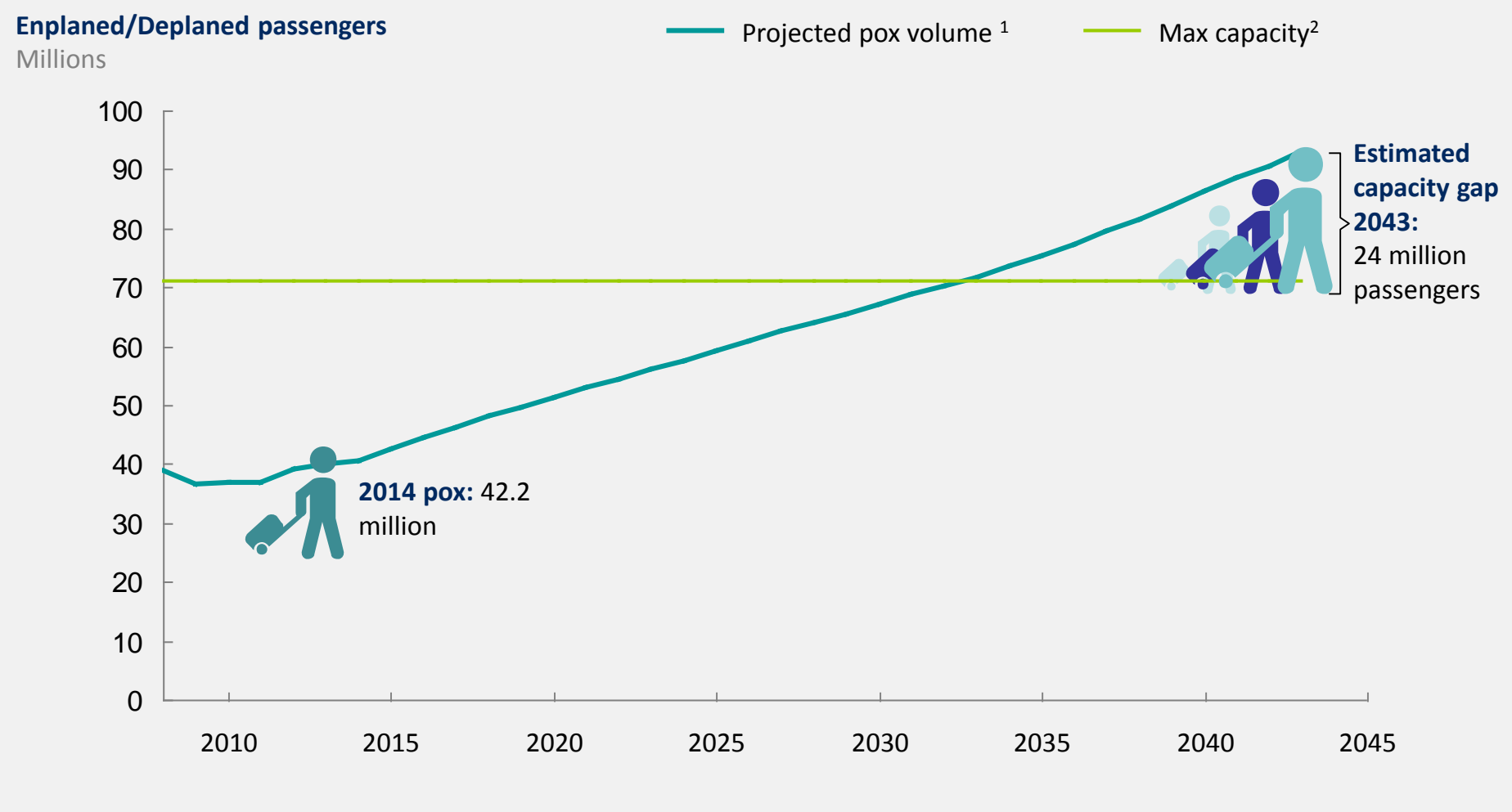


South-Central Ontario Regional Airports System

Airports and Major Ground Transportation Corridors



Growth Continues Over the Next 30 Years



1 Projection for Southern Ontario passenger traffic (excluding Ottawa) based on base case economic and population growth
2 Estimated maximum regional capacity assuming no additional investment, except Pearson

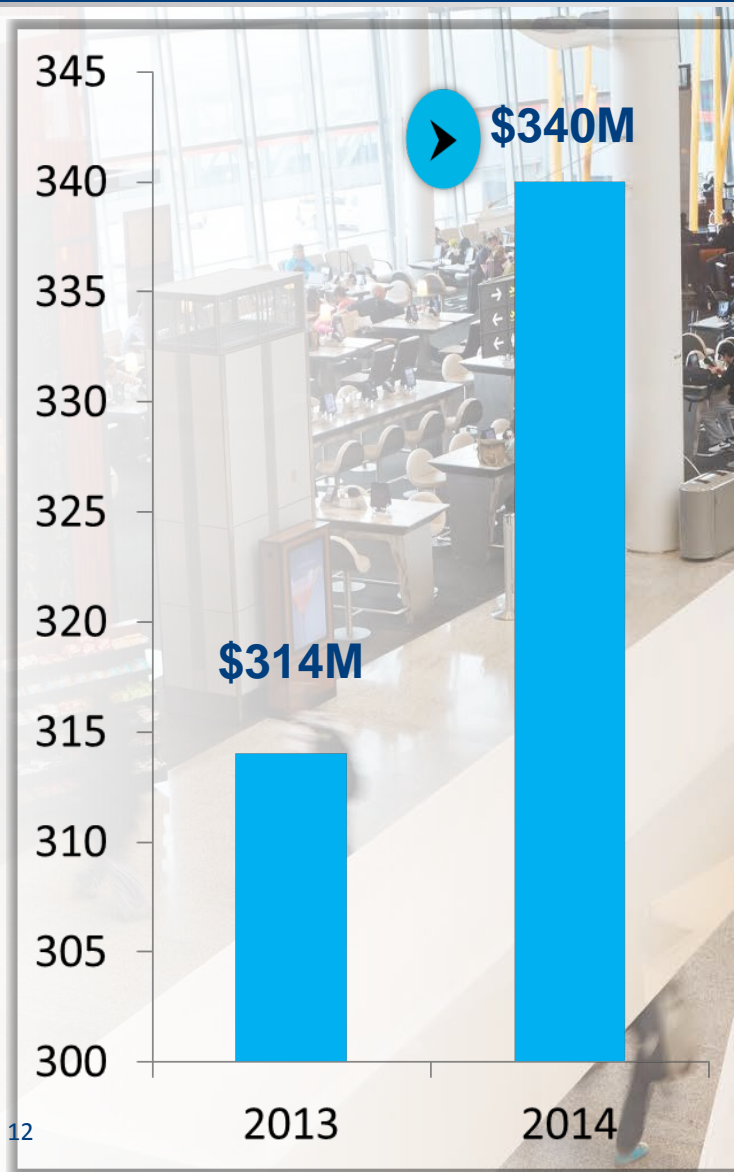
Strong Financial Position

\$42.7
▶ Million
Net Income

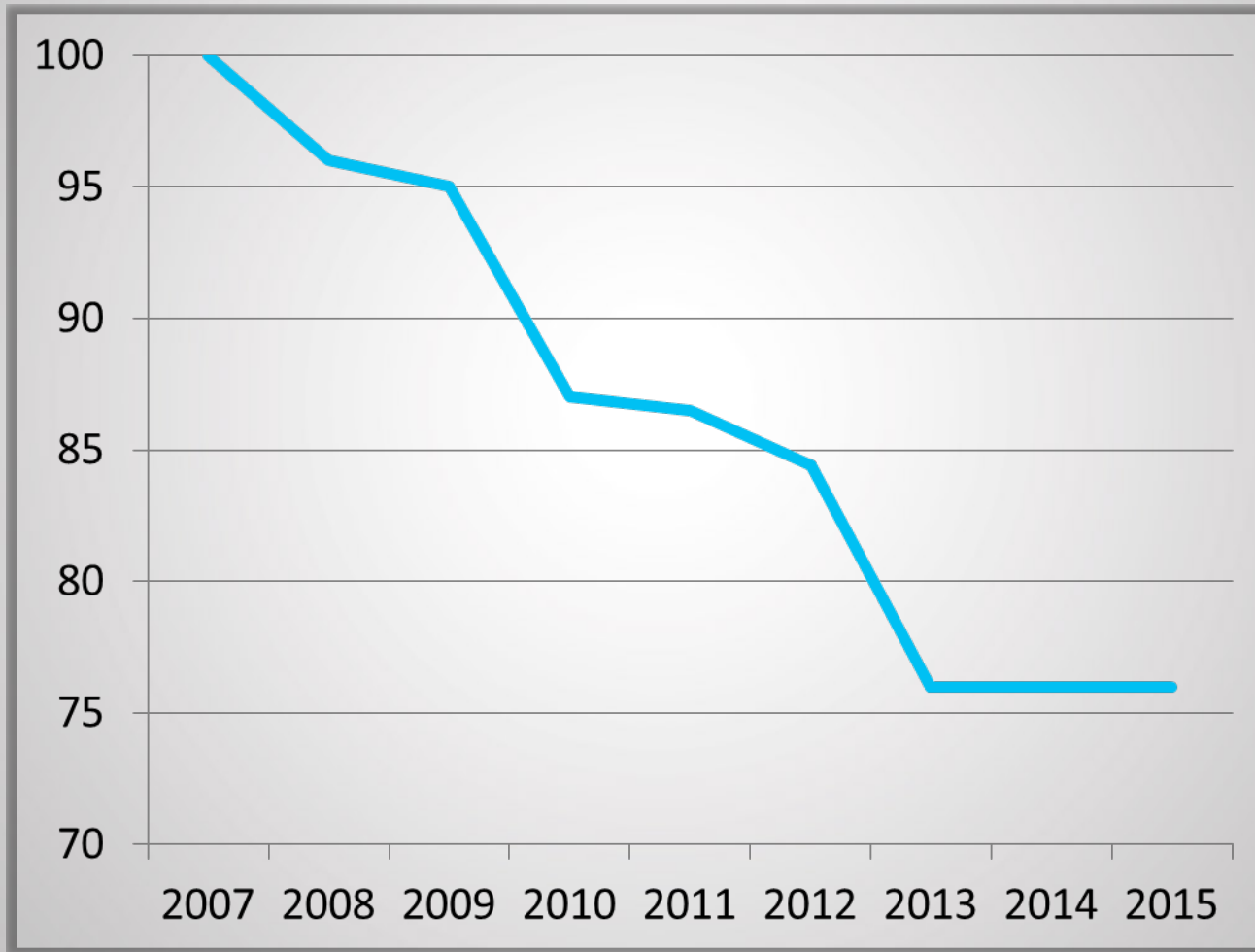
▶ Paying down debt faster

▶ Second year of rate freeze

We Continue to Grow Non-Aeronautical Revenue



And Reducing Rates for Air Carriers to Keep Toronto Pearson Competitive





Part of the Community

We're not only your airport; we're also your neighbour.

Stay in Touch

- Sign up for our newsletter Checking In
- Attend our community events & tours
- Community Partnerships
- Invite us out to your community events & meetings



Toronto Community Investments



Arts Etobicoke's Beats + Intentions Program

In-depth training and employment program for youth in both the business and creative side of the arts through workshops:

- Budgeting
- Grant Writing
- Publicity
- Marketing
- Instruction for dance, music, and performance



Arts for Children and Youth Welcome Mural

Engaged 50 children and young adults from: Toronto in a revitalization project, transforming the aesthetic of Terminal 3 through the production of a large-scale 54 foot original public mural composed of a series of painted and mosaic panels.



Somali Community Association Welcome Dinners

Partnered with the Association to introduce newcomers to other community members, who have successfully settled and effectively integrated into Canadian society.



Playing For Keeps

Lead community partner on a program that develops healthier, more active and better-connected communities – through play.

Through the program, over 180 volunteer ambassadors have been recruited to date

Open and Timely Communications



An Environmental Leader

- First airport in North America to be ISO 14001 certified
- In 2014, diverted 70% of all in terminal public facing waste
- Founded North America's largest eco-industrial zone: Partners in Project Green engaging over 600 businesses in sustainability
- Recognized as a SaveON Energy Champion, saving 890,000 kilowatt hours per year
- Recipient of Toronto and Region Conservation Authority 2014 Living City Award for Sustainable Community



Noise Management

Who Does What

Operator and manager of Toronto Pearson International Airport
 Develops and manages the Noise Management program
 Establishes the noise abatement procedures
 Respond to community questions and concerns

The CENAC acts in an advisory capacity to the GTAA on all issues relating to Toronto Pearson's Noise Management and Environmental Policies with a view to improving the GTAA's noise mitigation and environmental programs.

Committee members actively seek the opinions of their constituents on noise related matters and represent concerns in the committee forum and disseminate the results of discussions to their communities.



Coordinates the safe and efficient movement of aircraft in Canadian domestic airspace and international airspace assigned to Canadian control

Plays a key role in designing and publishing network of air routes that aircraft use to get to their destination as well as approach and departure procedures at airports

Authorizes airport's operating permit

Maintains flight activity and safety of operations by the airport

Enforcement of noise and operations

Responsible for conducting their operations in accordance with Transport Canada regulations and airport noise abatement procedures

Strengthening Relationships



New Retail/Food & Beverage



Passenger Flow

Measuring against international standards



Groundside Infrastructure

**Efficient connections
to/from Toronto Pearson**

**Launching June 6
Trains to depart Union Station
and Pearson every 15 minutes**



Transit Use Today

5%

Airport Passengers

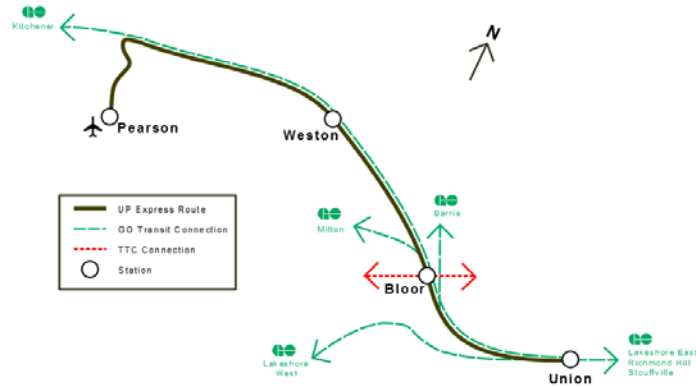
17%

Airport Employees



The last mile...regional transportation plans must consider connectivity to Pearson

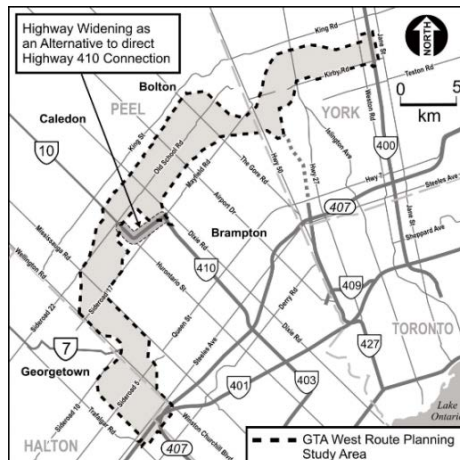
Union Pearson Express



Proposed SmartTrack plan



Proposed GTA west corridor



Regional Express Rail



Pan Am/Parapan Am Games

WELCOME! BIENVENUE! BIENVENIDA!



TORONTO2015
Pan Am/Parapan Am



Toronto
Pearson

Best in Class Customer Service



Toronto's Global Hub Airport

Sustaining Growth & Delivering Economic Benefits

Questions

