

COUNT *on* PEARSON

*Contributing to
Canada's Prosperity*



Toronto Pearson

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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

Good Neighbour

- Managing impacts; investing in communities

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



Toronto Pearson

1997-2013

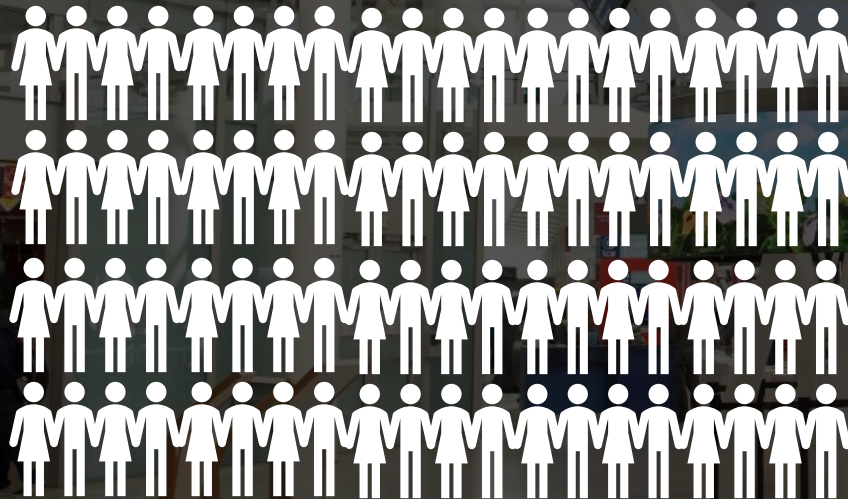
10M passengers in 16 years

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

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Mega Hub airports of the world



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

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Count on Pearson to deliver a great travel experience...



Toronto Pearson

building on our #1
quality ranking
among North
American airports,
2 years running.



4.31
out of 5



4.45
out of 5

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Conferring benefits to Toronto



Toronto Pearson

A photograph of a busy Toronto street scene. In the foreground, an orange taxi with the number 470 is visible. Behind it, a red and white TTC streetcar with the number 4243 is moving. The background shows city buildings, traffic lights, and pedestrians. A white diagonal line separates the image from the text on the right.

\$180 M

Procurement from Toronto
businesses

5,000

Residents work at
Toronto Pearson

60,000

Jobs in Toronto
facilitated by
Toronto Pearson

Toronto Pearson in your community



Toronto Pearson

Toronto Pearson Open Houses

- Ward 5 - Nunziata (Apr 25)

Street Team attending community events:

- Env. Days: Councillors Ford, Peruzza & Carroll
- Grilled Cheese Festival (Ward 3 - Grimes)
- Annette Farmers Market (Ward 4 - Perks)
- Fusion of Taste (Ward 1 - Ford)

Guest speaker at Bloor West Village Residents Assoc. AGM



Count on Pearson to invest in community



Toronto Pearson

- **Propeller Project, our Community Investment Program:** In 2018, >\$1 M invested in 24 organizations
 - Toronto's Mabelle Arts; Newcomer Kitchen; Rexdale Women's Centre
- **Community Sponsorships:**
 - Etobicoke Rib Fest
 - Toronto Public Library
 - Cultural Hot Spot
 - TOPS Movie Nights
 - Wheel's on the Danforth Street Festival



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Count on Pearson

to provide connectivity that breeds opportunities



Toronto Pearson

Toronto Pearson's Working with the City and Tourism Toronto

- to attract & support global conferences like Collision, Jehovah Witness, etc.
- Reflect the City in our terminals e.g. YYZLive



COLLISION
TECH CONFERENCE 2019

YYZ
LIVE
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Delivering transit and addressing congestion



Toronto Pearson

Challenges:

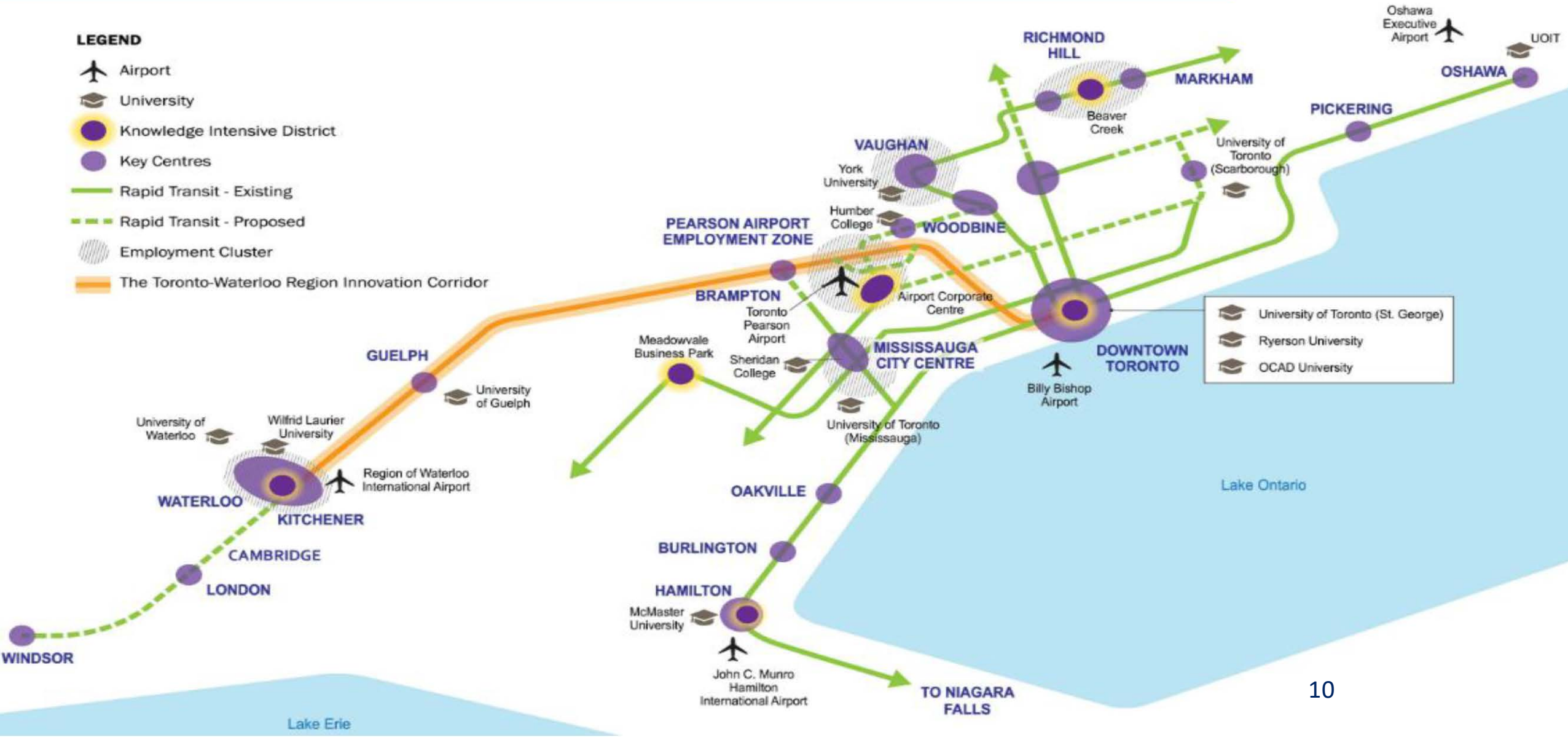
- Toronto Pearson is at the heart of the 2nd largest employment zone in Canada, home to more than 300,000 workers
- Businesses cannot attract workers and workers cannot access good jobs around the airport
- Lack of ground connections means there are more than 1 million car trips per day in and out of 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%

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Toronto Pearson is well situated to connect jobs and innovation centres across the Greater Golden Horseshoe



Toronto Pearson

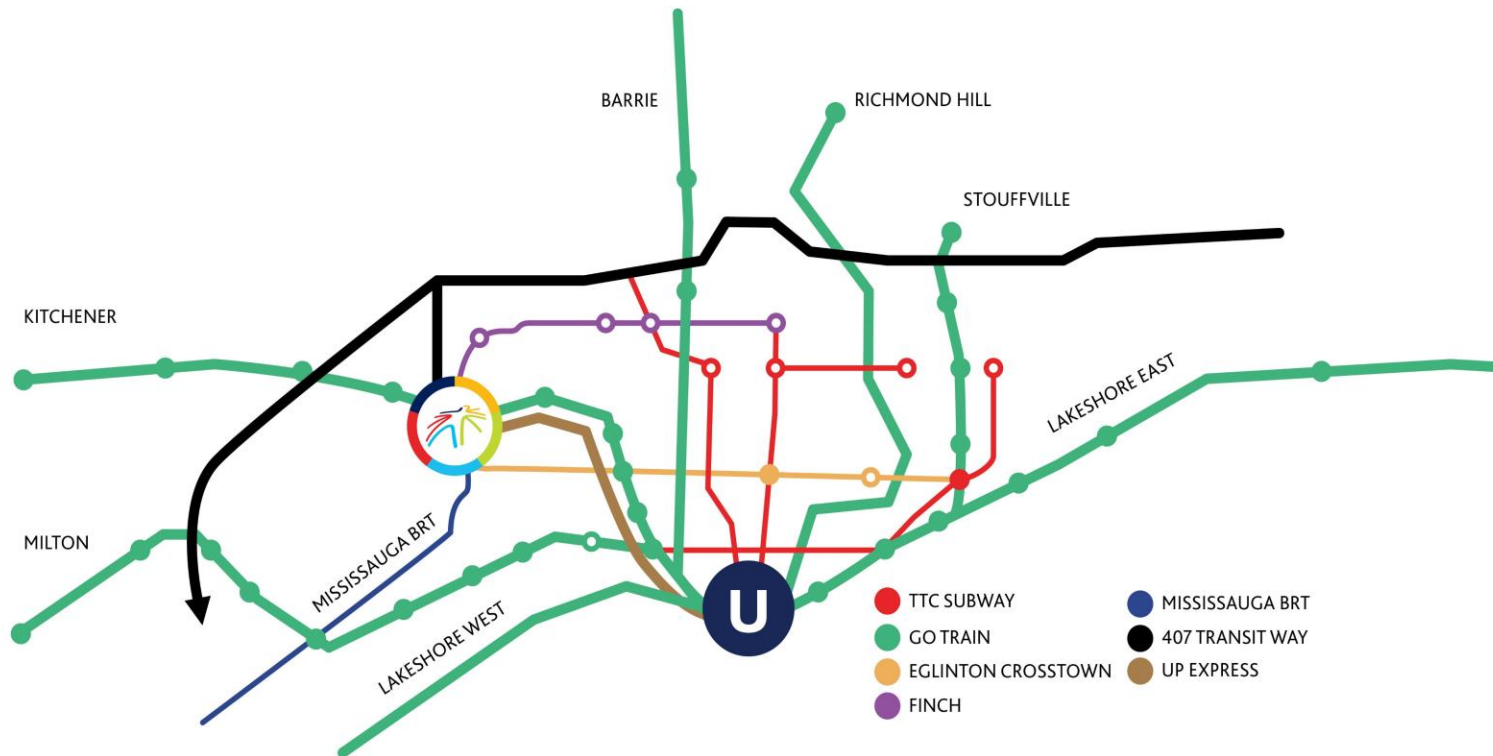


Future: Integrated transit services at Pearson



Toronto Pearson

Unlocking regional connectivity,
helping goods to move more freely



Our Asks:

Government support for:

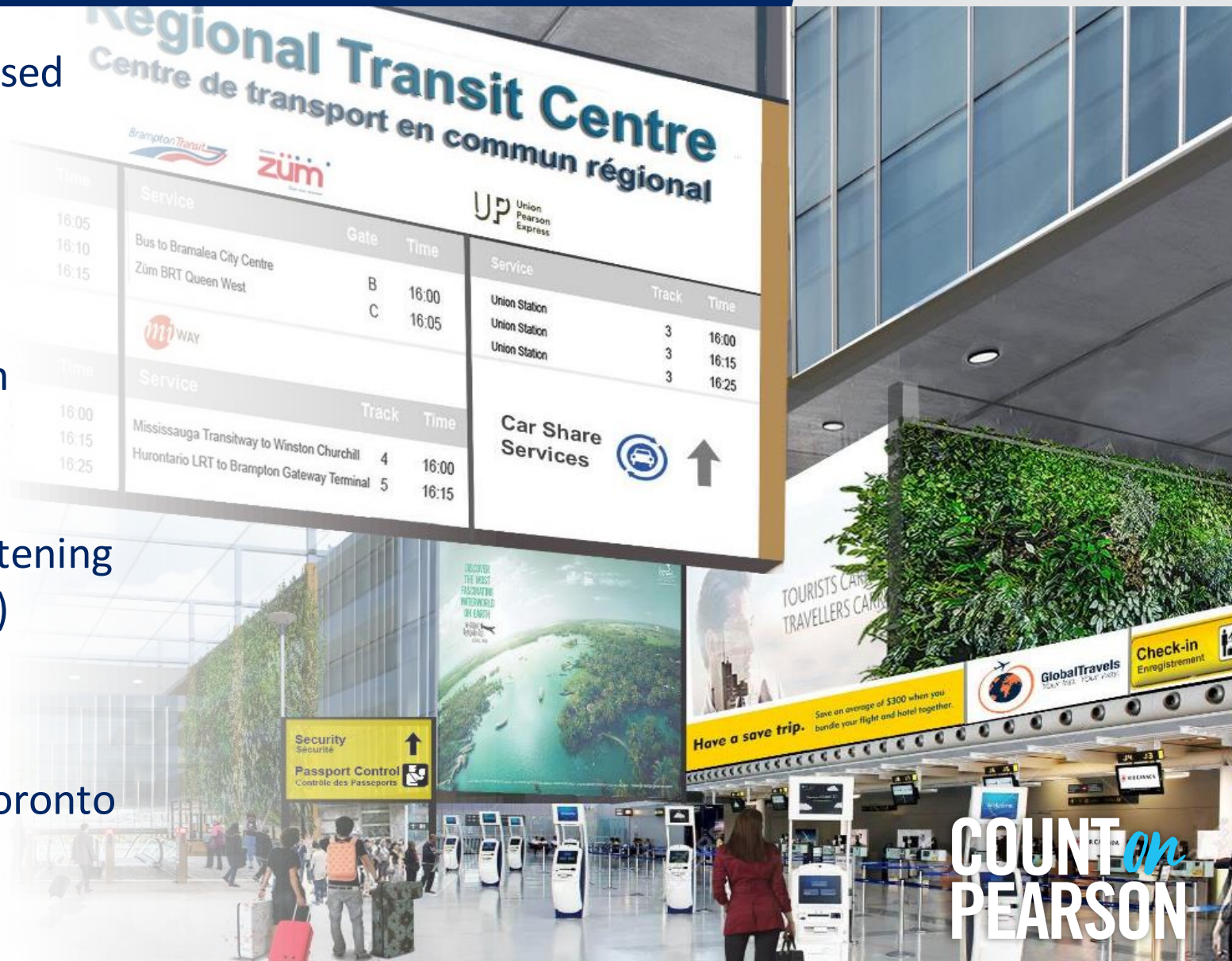
- Eglinton West LRT connection (Committed April 10th 2019)
- Finch LRT connection
- Capital improvements for better bus connections
- Kitchener GO Line bend
- Connection to the 407 transitway
- Improvements to Airport Road to facilitate access

“Union Station West”: Gaining momentum



Toronto Pearson

- Toronto Region Board of Trade endorsed Union Station West as priority infrastructure (Jan `19)
- Engagement with transit operators (incl. TTC) on planning and short-term improvements
- Engaging municipal staff in transit ‘listening tables’ in Q3 2019 (incl. Toronto staff)
- April 10th Ontario committed to an extension of Eglinton Crosstown to Toronto Pearson



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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



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Thank you