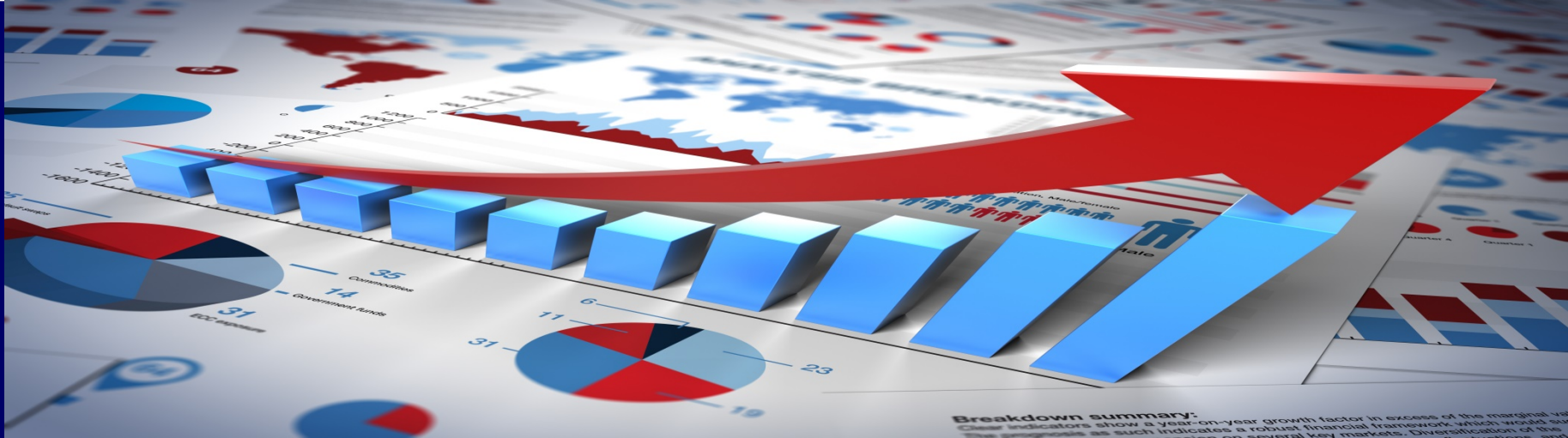




Project Summary – Porter Airlines – FINAL
submitted by Nanos, March 2014 (Submission 2014-508)



Executive Summary

Although transportation issues are the most important issues for Toronto residents looking at the next municipal election, Billy Bishop Toronto City Airport is not specifically identified by many as an election issue according to the latest survey of 500 Torontonians conducted between March 22nd and 23rd, 2014. The survey also finds that the airport is an important part of Toronto's transportation future and there is significant support for both extending the runway and allowing new jets to use the airport.

- Three of four (76.9%) residents think the airport is an important or somewhat important part of Toronto's transportation future.
- Two of three (65.8%) Torontonians support or somewhat support allowing new jet aircraft, which are no noisier, to land at the airport.
- Six in ten (59.7%) support or somewhat support extending the runway at the Billy Bishop Toronto City Airport.
- Only 0.4% (two respondents) said, unprompted, that the Billy Bishop Toronto City Airport is an important issue for the upcoming municipal election.
- The research suggests that there is a significant level of support for jets to be allowed at the Billy Bishop Toronto City Airport, provided they do not exceed the current noise limits.

Municipal Issue

Source: Nanos Research, RDD dual frame random telephone survey, March 22nd to 23rd, 2014, n=501 Torontonians, accurate 4.4 percentage points plus or minus, 19 times out of 20.

	Total (n=501)
Transportation and public transit	25.7%
Leadership/good governance	22.0%
Taxes	8.3%
Jobs/economy	7.2%
Budget	4.8%
Infrastructure	3.8%
Social services	3.6%
Cost of living	1.4%
Safety/crime	1.4%
Billy Bishop Toronto City Airport	0.4%
Other	7.5%
Unsure	13.7%

QUESTION – Thinking of the upcoming Toronto municipal elections, what is the most important issue for you? [Open-ended]

The two most important issues for residents of Toronto are transportation/ public transit (25.7%) and good governance (22.0%). The 0.4% who mentioned Billy Bishop represent two respondents. These are the two comments: “Expanding the Billy Bishop Airport” and “I do not want jets at Billy Bishop Airport.” The Airport is not an important, unprompted, issue of concern to respondents for the upcoming municipal election based on the survey completed on March 23rd.

Confidential

Municipal Issue

Source: Nanos Research, RDD dual frame random telephone survey, March 22nd to 23rd, 2014, n=501 Torontonians, accurate 4.4 percentage points plus or minus, 19 times out of 20.

Leadership/good governance
Infrastructure Cost of living
Jobs/economy Social services Budget

Taxes
Other

Transportation and public transit

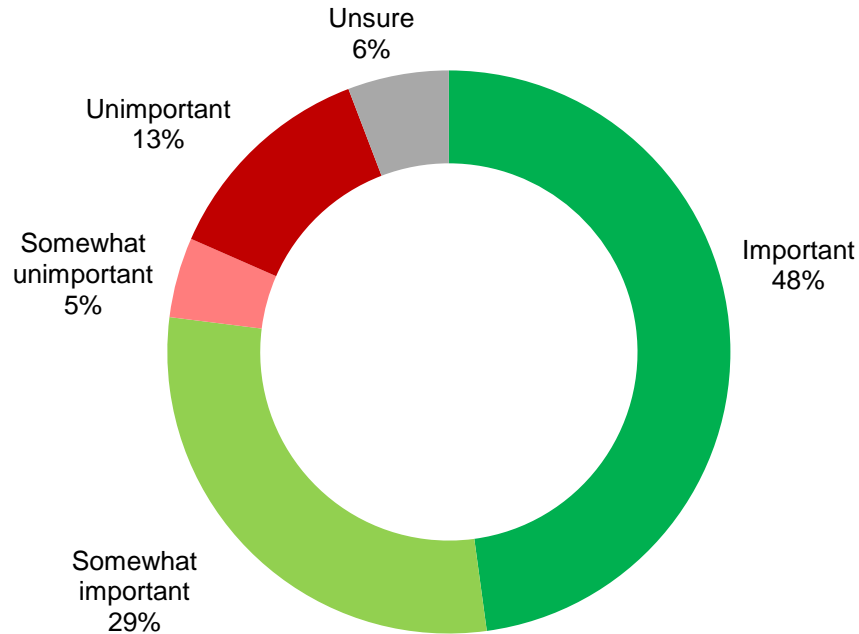
QUESTION – Thinking of the upcoming Toronto municipal elections, what is the most important issue for you? [Open-ended]

About a Word Cloud

A word cloud is a visual depiction of opinion where words depicted in larger font were more frequently mentioned.

Billy Bishop Toronto City Airport

Source: Nanos Research, RDD dual frame random telephone survey, March 22nd to 23rd, 2014, n=501 Torontonians, accurate 4.4 percentage points plus or minus, 19 times out of 20.



***Note: Charts may not add up to 100 due to rounding**

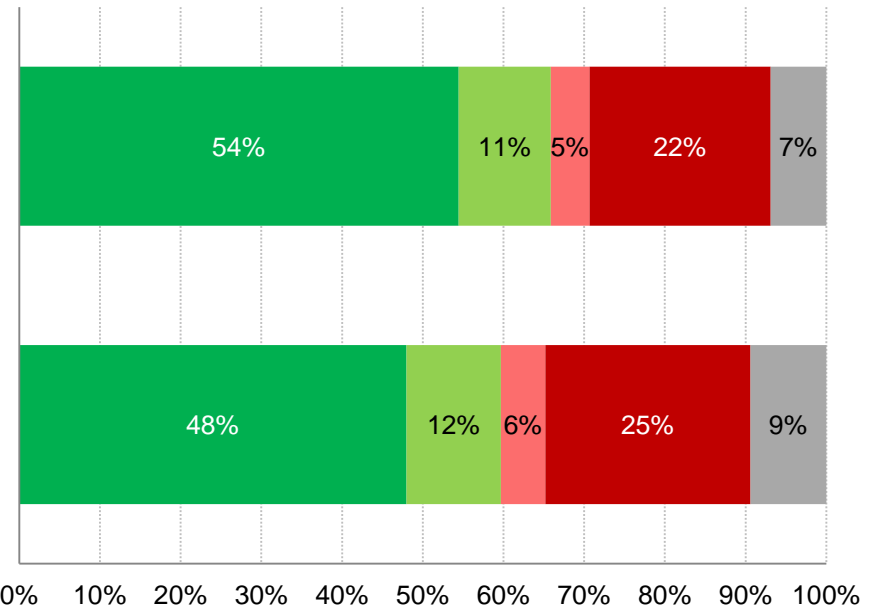
QUESTION – Is the Billy Bishop Toronto City Airport downtown an important, somewhat important, somewhat unimportant, or unimportant part of Toronto's transportation future?

The Billy Bishop airport is an important (47.8%) or somewhat important (29.1%) part of Toronto's transportation future for more than three of four residents.

Billy Bishop Toronto City Airport

Source: Nanos Research, RDD dual frame random telephone survey, March 22nd to 23rd, 2014, n=501 Torontonians, accurate 4.4 percentage points plus or minus, 19 times out of 20.

Allowing new jet aircraft to land at Billy Bishop Toronto City Airport as long as the new jet aircraft do not exceed the airport's existing noise limits



Extending the runway at Billy Bishop Toronto City Airport by 200 meters into the water at each end as long as it does not impact boaters

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

■ Support ■ Somewhat support ■ Somewhat oppose ■ Oppose ■ Unsure

***Note: Charts may not add up to 100 due to rounding**

QUESTION – Do you support, somewhat support, somewhat oppose or oppose the following: [RANDOMIZE]

Overall, two of three Toronto residents support (54.4%) or somewhat support (11.4%) allowing new jet aircraft to land at the airport. Likewise, six in ten support (48.0% support and 11.7% somewhat support) extending the runway.



Methodology

Methodology

Nanos conducted a stand alone RDD dual frame (land- and cell-lines) random telephone survey (using live agents) of 501 Torontonians between March 22nd and 23rd, 2014. The sample included both land- and cell-lines. Individuals randomly called using random digit dialling and were called five times. The margin of error for a random survey of 501 Torontonians is ± 4.4 percentage points, 19 times out of 20. Readers should note that all of the questions in the study are presented in this report in the order that they were asked. The survey was commissioned by Porter Airlines.

Note: Charts may not add up to 100 due to rounding

To follow is the sampling distribution for the five regions within Toronto:

All	Sample Size (n=501)	Margin of Error
Scarborough	125	± 8.9
Etobicoke	71	± 11.8
East York-York	47	± 14.5
North York	113	± 9.4
Old Toronto	145	± 8.3

About Nanos

Nanos is one of North America's most trusted research and strategy organizations. Our team of professionals is regularly called upon by senior executives to deliver superior intelligence and market advantage whether it be helping to chart a path forward, managing a reputation or brand risk or understanding the trends that drive success. Services range from traditional telephone surveys, through to elite in-depth interviews, online research and focus groups. Nanos clients range from Fortune 500 companies through to leading advocacy groups interested in understanding and shaping the public landscape. Whether it is understanding your brand or reputation, customer needs and satisfaction, engaging employees or testing new ads or products, Nanos provides insight you can trust.



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Tabulations



2014-508 – PORTER AIRLINES – STAT SHEET – REGIONAL

			Region					Total
			Scarborough	Etobicoke	East York-York	North York	Old Toronto	
Question 1 – Thinking of the upcoming Toronto municipal elections, what is the most important issue for you?	Budget	Count	7	2	2	7	6	24
		% within Region	5.5%	2.8%	4.2%	6.2%	4.2%	4.8%
	Jobs/economy	Count	16	6	2	6	6	36
		% within Region	12.6%	8.3%	4.2%	5.3%	4.2%	7.2%
	Leadership/good governance	Count	20	18	10	22	40	110
		% within Region	15.7%	25.0%	20.8%	19.5%	28.0%	21.9%
	Infrastructure	Count	6	2	3	7	2	20
		% within Region	4.7%	2.8%	6.3%	6.2%	1.4%	4.0%
	Taxes	Count	15	7	4	11	5	42
		% within Region	11.8%	9.7%	8.3%	9.7%	3.5%	8.3%
	Transportation and public transit	Count	23	16	13	23	54	129
		% within Region	18.1%	22.2%	27.1%	20.4%	37.8%	25.6%
	Safety/crime	Count	4	0	0	1	2	7
		% within Region	3.1%	0.0%	0.0%	0.9%	1.4%	1.4%
	Social services	Count	6	0	3	4	5	18
		% within Region	4.7%	0.0%	6.3%	3.5%	3.5%	3.6%
	Cost of living	Count	1	4	0	2	1	8
		% within Region	0.8%	5.6%	0.0%	1.8%	0.7%	1.6%
	Island Airport	Count	0	1	0	0	1	2
		% within Region	0.0%	1.4%	0.0%	0.0%	0.7%	0.4%
	Other	Count	5	8	6	6	12	37
		% within Region	3.9%	11.1%	12.5%	5.3%	8.4%	7.4%
	Unsure	Count	24	7	5	24	9	69
		% within Region	18.9%	9.7%	10.4%	21.2%	6.3%	13.7%
		Count	127	72	48	113	143	503
Total		% within Region	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Random telephone survey (land- and cell-lines) using live agents of 501 Torontonians 18 years of age and older conducted on March 22nd and 23rd, 2014. The margin of error for a random telephone survey of 501 Torontonians is ± 4.4 percentage points, 19 times out of 20.



2014-508 – PORTER AIRLINES – STAT SHEET – REGIONAL

			Region					
			Toronto 2014-03	Scarborough	Etobicoke	East York-York	North York	Old Toronto
Question 2 – Is the Billy Bishop Toronto City Airport downtown an important, somewhat important, somewhat unimportant or unimportant part of Toronto's transportation future?	Total	Unwgt N	501	125	71	47	113	145
		Wgt N	501	125	72	47	113	145
	Important	%	47.8	49.3	46.2	51.8	50.4	43.9
	Somewhat important	%	29.1	30.3	18.0	30.3	26.4	35.4
	Somewhat unimportant	%	4.6	2.1	9.8	3.5	4.2	5.0
	Unimportant	%	12.6	13.0	19.6	7.1	13.2	10.2
	Unsure	%	5.8	5.3	6.4	7.4	5.8	5.5

Random telephone survey (land- and cell-lines) using live agents of 501 Torontonians 18 years of age and older conducted on March 22nd and 23rd, 2014. The margin of error for a random telephone survey of 501 Torontonians is ± 4.4 percentage points, 19 times out of 20.



2014-508 – PORTER AIRLINES – STAT SHEET – REGIONAL

Do you support, somewhat support, somewhat oppose, or oppose the following: [RANDOMIZE]

			Region					
			Toronto 2014-03	Scarborough	Etobicoke	East York-York	North York	Old Toronto
Question 3 – Extending the runway at Billy Bishop Toronto City Airport by 200 meters into the water at each end as long as it does not impact boaters.	Total	Unwgt N	501	125	71	47	113	145
		Wgt N	501	125	72	47	113	145
	Support	%	48.0	53.9	41.1	60.8	47.7	42.4
	Somewhat support	%	11.7	10.1	12.7	15.2	7.6	14.5
	Somewhat oppose	%	5.5	5.4	1.6	4.6	8.1	5.8
	Oppose	%	25.4	24.5	32.4	15.8	24.3	26.6
	Unsure	%	9.4	6.1	12.2	3.5	12.2	10.8

			Region					
			Toronto 2014-03	Scarborough	Etobicoke	East York-York	North York	Old Toronto
Question 4 – Allowing new jet aircraft to land at Billy Bishop Toronto City Airport as long as the new jet aircraft do not exceed the airport's existing noise limits.	Total	Unwgt N	501	125	71	47	113	145
		Wgt N	501	125	72	47	113	145
	Support	%	54.4	57.7	49.8	68.6	56.1	48.0
	Somewhat support	%	11.4	13.4	8.6	5.8	11.0	13.3
	Somewhat oppose	%	4.8	3.7	1.3	4.0	9.0	4.5
	Oppose	%	22.4	19.9	30.1	18.1	17.9	25.8
	Unsure	%	6.9	5.2	10.2	3.5	6.1	8.5

Random telephone survey (land- and cell-lines) using live agents of 501 Torontonians 18 years of age and older conducted on March 22nd and 23rd, 2014. The margin of error for a random telephone survey of 501 Torontonians is ± 4.4 percentage points, 19 times out of 20.