

Presentation to City of Toronto

June 25, 2013



For You. The World.



Toronto Pearson
International Airport | Aéroport International

For You. The World.

Toronto Pearson Means...

- The **front door** to Toronto, Ontario, Canada
- Facilitator of **economic growth**
 - Jobs, trade and improved competitiveness
- A strategic and supportive **partner**
- Strong **community presence**



Growth – A Reflection of Toronto

Traffic Stats and Forecasts

We're Growing, because Toronto's Growing:

- 2012: 35 million passengers
- 2012 passenger traffic up 4.4% vs 2011:
 - Domestic: +4.3%
 - Transborder: +5.4%
 - International: +3.7%
- Air carriers increased service on 18 new routes in 2012
- 2013 forecast to increase 3.3% to 35.6 million passengers
- Ethiopian Airlines, Philippine Airlines began service in July and November 2012 respectively
- New air carriers for 2013: Saudi Arabian Airlines, Egypt Air, Aeroflot



Where we're going



42 million
passengers/yr
by 2018



= 12.5M

Connections



Toronto - A Growing Global Hub

2nd in North America for
International Arrivals

4th largest entry point
into the U.S.

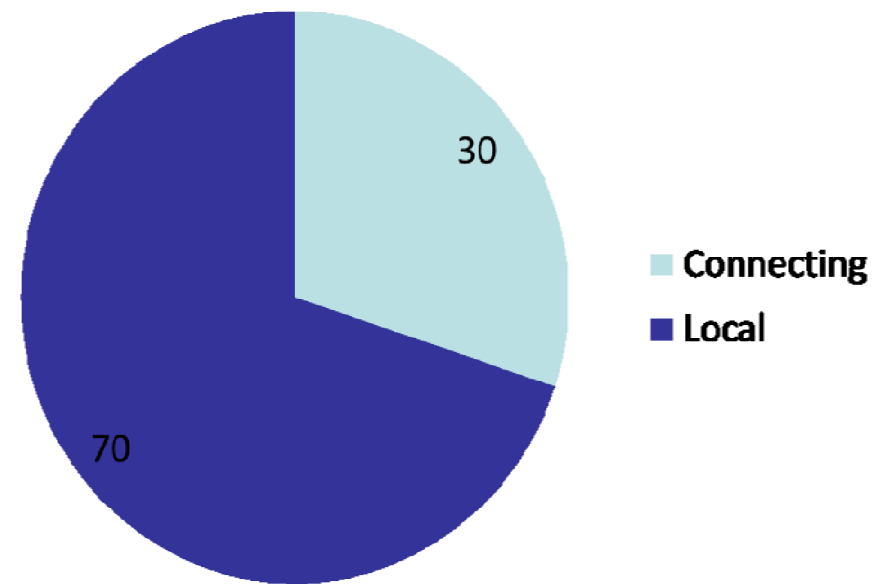


Hub airports create direct benefits locally

Connecting passengers:

- Increase the number of destinations served with direct service
- Allow more direct flights per week than would be possible otherwise
- Support local tourism by making our market more readily accessible by direct flights

Passenger Traffic:



One of Toronto's Top Employers

- 11,000 residents employed at Toronto Pearson, making us one of Toronto's top employers
- Toronto Pearson spent \$140+ million on goods and services in Toronto in 2012
- Largest suppliers across Toronto include Black & McDonald, Hart-Well Electrical, Gazzola Paving, Juniper Park



Extending Toronto's reach into new markets

- Key objectives of *Collaborating for Competitiveness** Toronto's new economic growth plan:
 - Make Toronto the most competitive big city in North America
 - Ensure adequate supply of business input essentials
 - Encourage business investment and formation
- With the City of Toronto's new economic growth plan in place, how can Toronto Pearson assist in ensuring businesses (products, services and people) are well connected globally?

Collaborating for Competitiveness

A Strategic Plan for Accelerating
Economic Growth and Job Creation in Toronto



City of Toronto

January 2013

Our role: Help drive direct global access for Toronto into new markets

* Source: City of Toronto: Collaborating for Competitiveness: A Strategic Plan to Accelerate Economic Growth and Job Creation in Toronto



Value of Connectivity

All businesses generate direct, indirect & induced impacts...

- Starting point is the **airport employee**
- Wages spent by direct and indirect employees have an impact on wider demand
- This impact is generated by any employer
- Methodology based on multipliers



... but the impacts of airports on the economy are unique

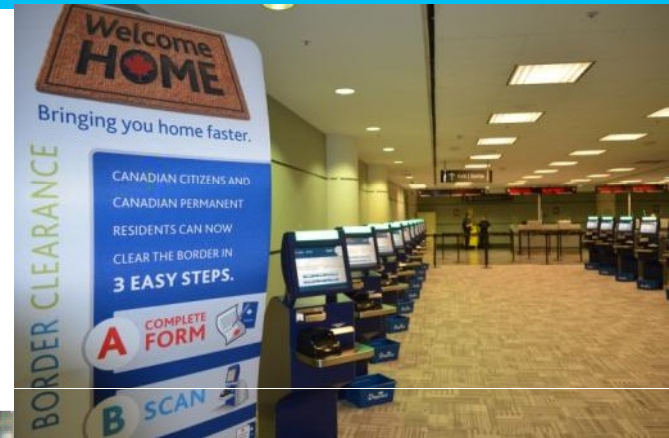
- Starting point is the **air traveller**
- Travel is an input to business activity
- Improved connectivity reduces travel times and hence the transaction costs of doing business
- This makes business more efficient and increases economic activity
- Methodology based on causality chain



Understanding the importance of improved customer service



Working with Government - Facilitation for Growth



Toronto Pearson -- Official Welcome Partner of Pan Am Games

- As the first and last impression to Toronto, it is important to ensure strong memories from the time visitors arrive until they return home
- Our airport will be a critical component for the operational success of the Games and will be well-positioned to handle the thousands of athletes, spectators, media and dignitaries

TO 2015



Pan/ParaPan Am
TORONTO 2015

TM/MC



Strong Community Presence

- Supporting local events and programs in communities surrounding Toronto Pearson
- Helping to balance our fundamental role in community life and our business operations
- Three key areas of focus: Getting Started and Social Sustainability, Environmental Stewardship, Youth Leadership



Thank you



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