





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:

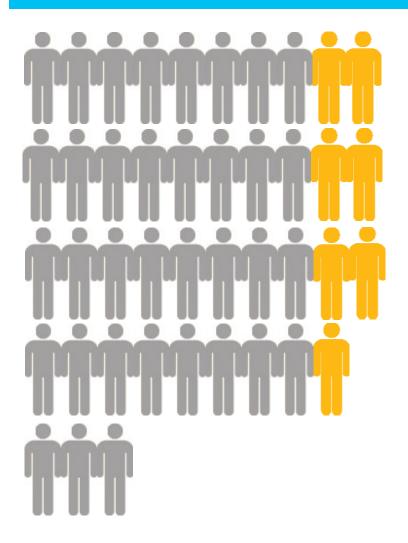
Domestic: +4.3%

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



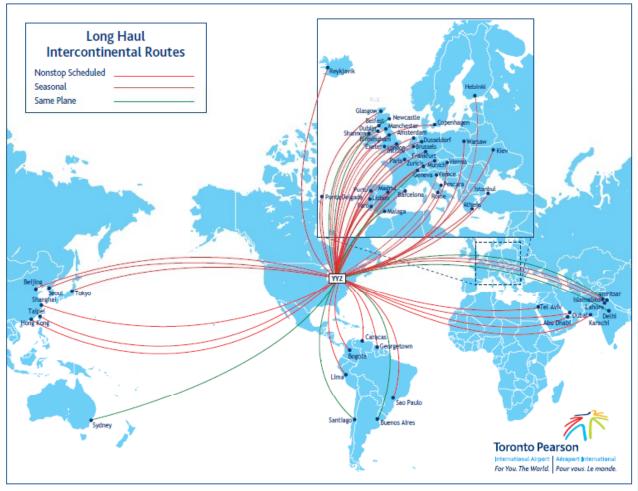
Toronto - A Growing Global Hub

2nd in North America for International Arrivals



4th largest entry point into the U.S.

Ensuring Global Connectivity for Toronto



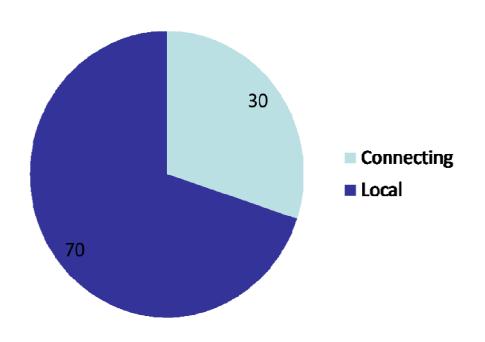


Hub airports create direct benefits locally

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

Collaborating for Competitiveness

A Strategic Plan for Accelerating



M Toronto

January 20

 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?

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



Value of Connectivity

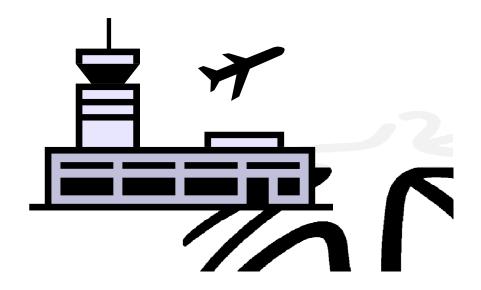
All businesses generate direct, indirect & induced impacts...

- 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





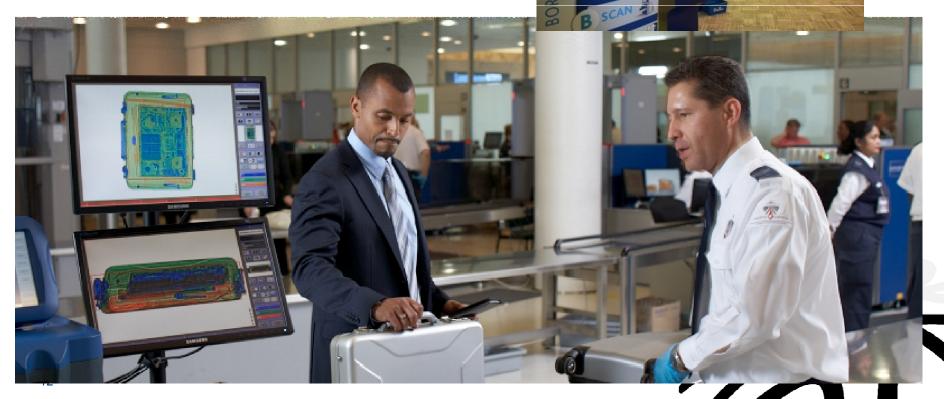




Working with Government - Facilitation for Growth







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The Toronto Size # MONTAY, APRIL 1, 2013

Formal studies

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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



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





























