Appendix A – Meeting Agenda

Billy Bishop Toronto City Airport
Community Liaison Committee Meeting # 47

September 28th, 2022
6:30 p.m. – 8:30 p.m.

Hybrid Meeting

In-Person: Waterfront Neighbourhood Centre
627 Queens Quay West
Toronto, ON
M5V 3G3

Virtual: Zoom

AGENDA

6:30 Log-In & Welcome (Alexander Furneaux)

6:35 Review of Meeting Minutes and Action Items (Alexander Furneaux)

6:45 PortsToronto Updates (Michael Antle & Deborah Wilson)

- Staffing Changes
- Airport Recovery Update
- Summer 2022 Public Opinion Survey

7:15 NAV Canada Update (Dave Purkis)

7:30 Community Updates (YQNA, BQNA, TICA)

7:50 CLC Refresh Update (Franca Di Giovanni)

8:15 Air Quality Study Update (Angela Homewood/Joan Prowse)

8:25 Business Arising

8:30 Adjourn

Appendix B – PortsToronto Presentation on Airport Recovery Updates

Community Liaison Committee Updates
Billy Bishop Toronto City Airport

September 28th, 2022



Billy Bishop Toronto City Airport (YTZ)

- Passenger and Aircraft Movement Updates
- Medevac flights
- Government of Canada Travel Requirements
- Connect Airlines Update



BILLY BISHOP TORONTO CITY AIRPORT

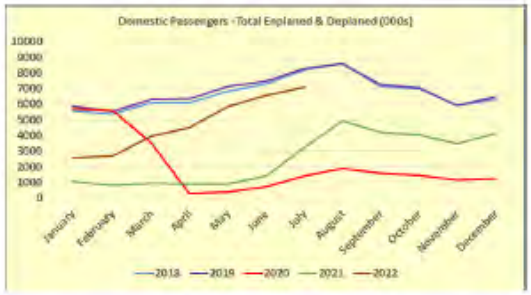
CANADIAN AIRPORTS COUNCIL | CONSEIL DES AÉROPORTS DU CANADA

Canada's Airports: Passenger Traffic Statistics

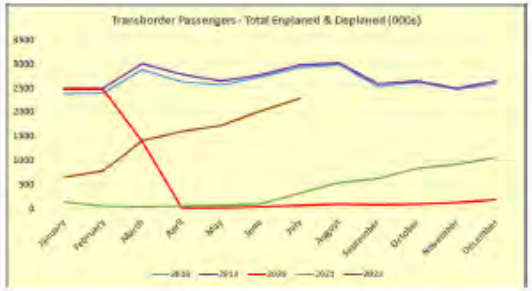
July 2022

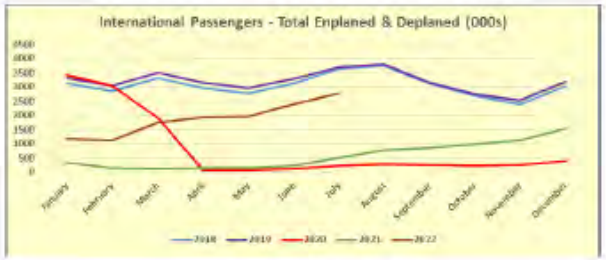
The following passenger traffic data comes from the Canadian Airports Information Sharing, a survey of 21 of the busiest airports in Canada, which represent more than 95% of Canada's air passenger traffic.

	July vs 2019	Year to July vs YTA 2019
Total Enplaned/Deplaned Pax	81%	64%
Domestic E/D Pax	85%	71%
Transborder E/D Pax	77%	55%
Other International E/D Pax	75%	57%



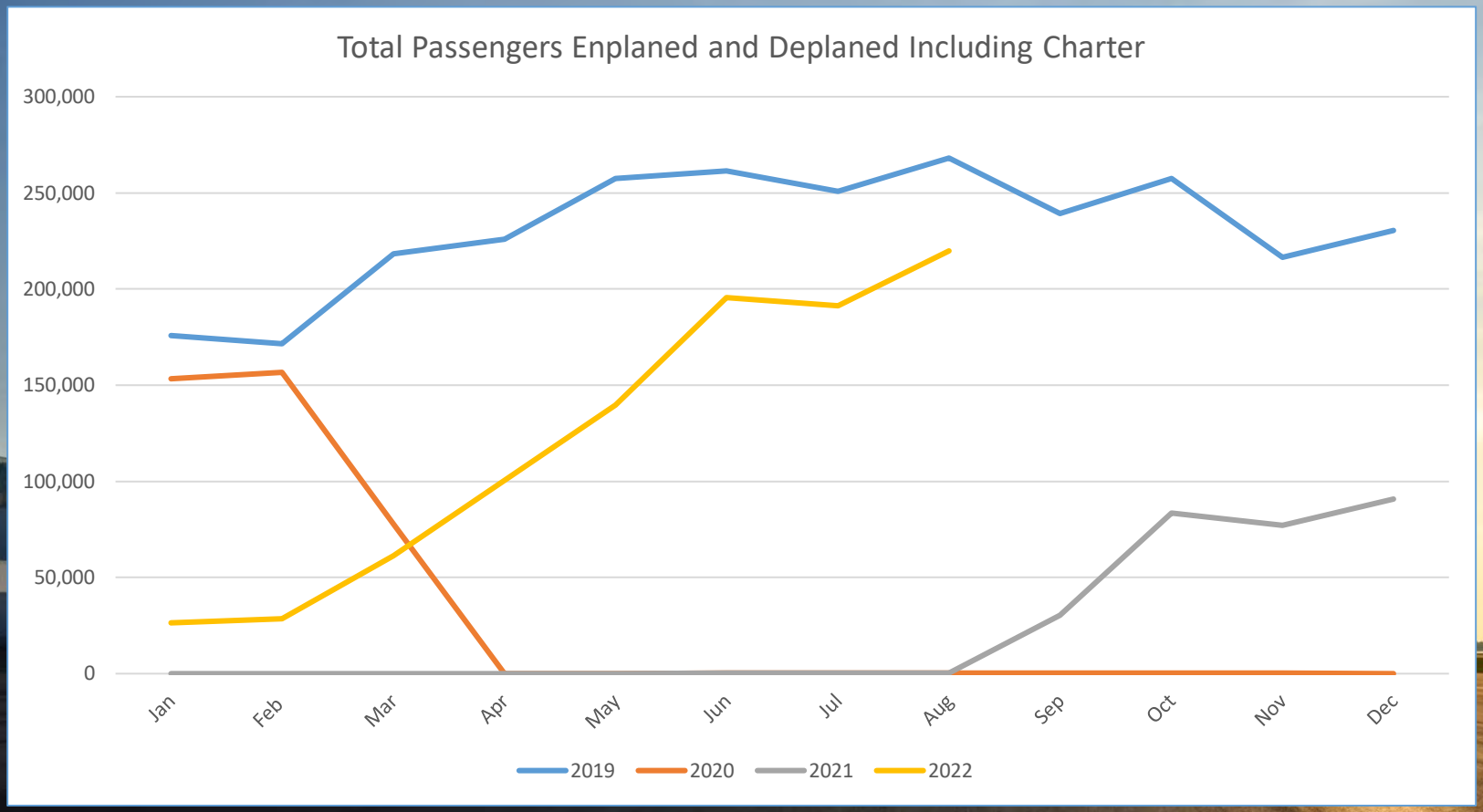






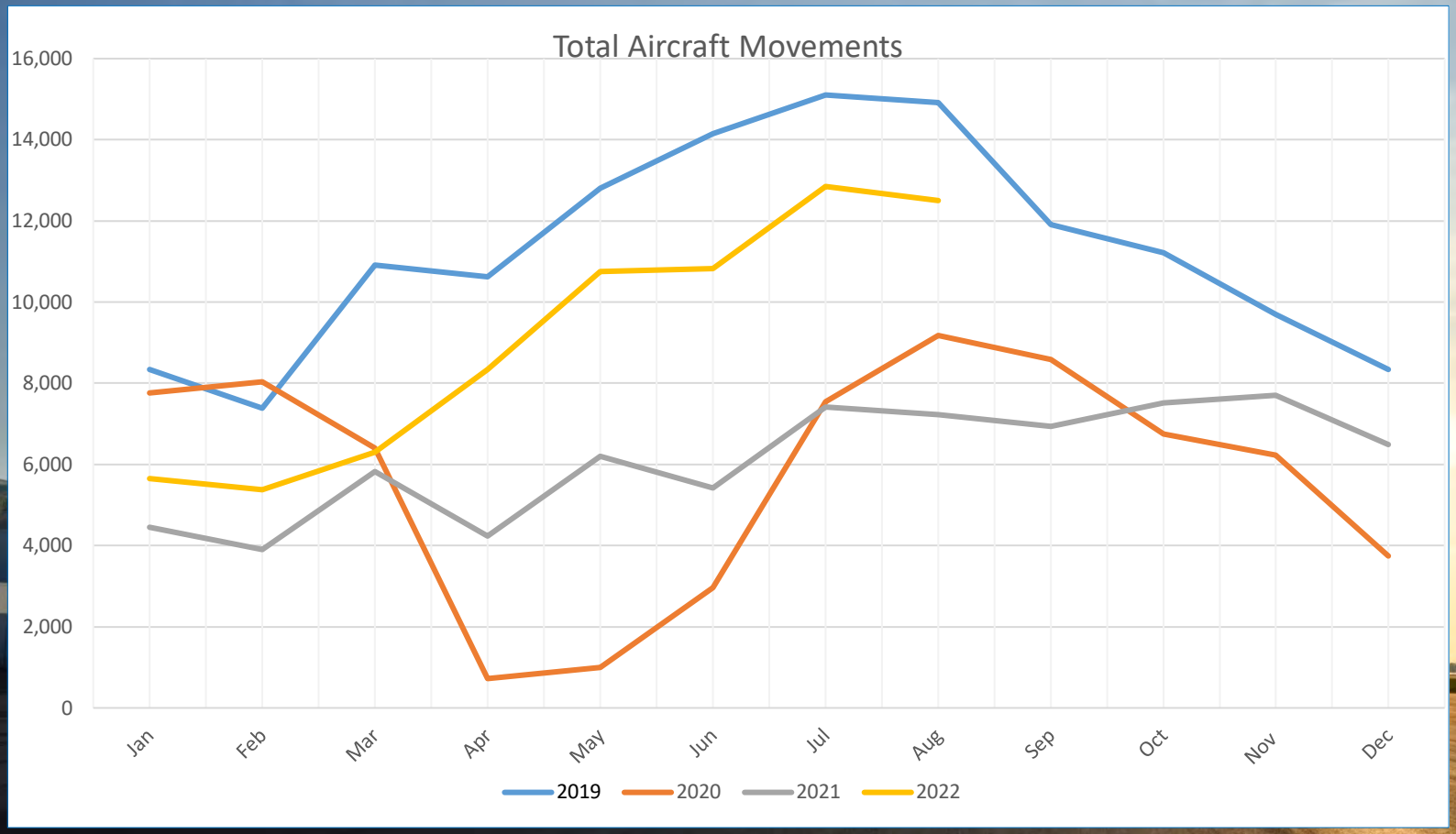
BILLY BISHOP TORONTO CITY AIRPORT

Billy Bishop Toronto City Airport Passenger Traffic



BILLY BISHOP TORONTO CITY AIRPORT

Billy Bishop Toronto City Airport Aircraft Movements



BILLY BISHOP TORONTO CITY AIRPORT

Billy Bishop Toronto City Airport Recap

	August 2022 vs 2019	YTD 2022 vs 2019
Total Passengers	82%	53%
Total Aircraft Movements	84%	77%

BILLY BISHOP TORONTO CITY AIRPORT

ORNGE Medevac Flights

Month	Regular hours	After hours
January	297	49
February	273	74
March	267	39
April	356	74
May	440	84
June	455	71
July	419	86
August	464	80
Total	2971	557

BILLY BISHOP
TORONTO CITY AIRPORT

Next Steps

- Government of Canada Travel Requirements
- Connect Airlines Update


BILLY
BISHOP
TORONTO CITY AIRPORT
Thank You

Appendix C.1 – PortsToronto Presentation on 2022 Public Opinion Survey: Overview

Presented at the CLC Meeting

PORTS TORONTO

PORTS TORONTO PUBLIC OPINION SUVEY

A QUANTITATIVE SURVEY
OF TORONTO RESIDENTS

FINAL REPORT | June 22, 2022



ENVIRONICS RESEARCH

RESEARCH METHODS

The following report is based on results from a Spring 2022 public opinion telephone survey that gauges Toronto residents' attitudes toward, and experiences with, Billy Bishop Toronto City Airport.

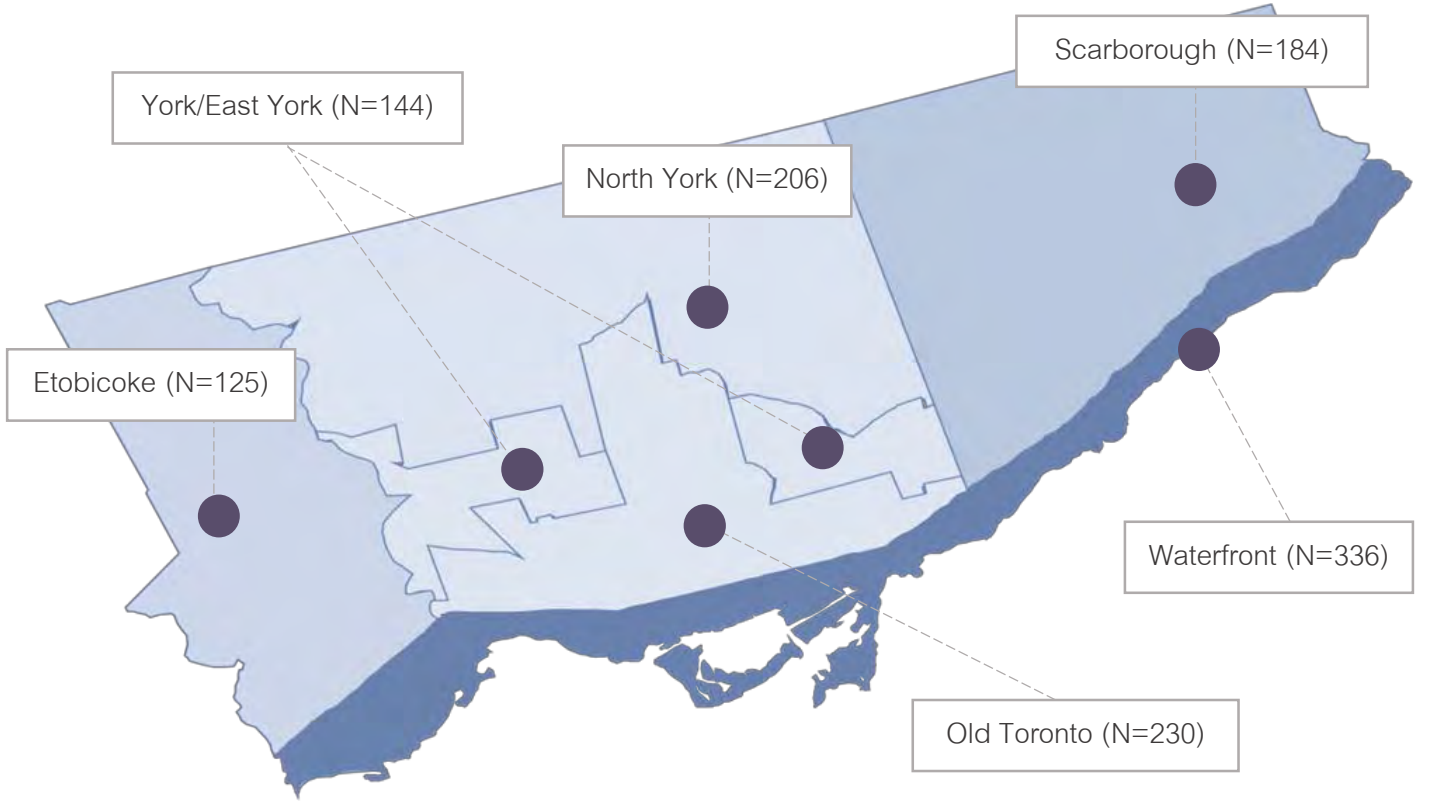
This 15-minute telephone (CATI) survey was conducted from May 5th - June 8th, 2022, among a random and representative sample of N=1,225 residents aged 18 years and older – including an oversample of N=336 residents living along the Waterfront region. In this report, the Waterfront region is defined as the body of water-facing regions in the city spanning from Etobicoke to Scarborough (see slide no. 7 for map outlining this region). The margin of error for this survey is ± 2.8%, 19 times out of 20.

As a continuation of public satisfaction surveys for PortsToronto executed by Environics Research, the 2022 survey was structured to highlight comparisons of responses from previous years' questions, where applicable. Past surveys were conducted in 2012, 2014, 2016, 2018 and 2022.

Results are expressed as percentages unless otherwise noted. Results may not add to 100% due to rounding or multiple responses. Net results cited in text may not exactly match individual results shown in charts due to rounding.

RESEARCH METHODS

The survey was conducted among 1,225 residents of Toronto. The map below shows the regions and their corresponding sample sizes of the survey. There is an oversample of the Waterfront region (akin to previous iterations of the PortsToronto Public Opinion Survey) of N=336 residents – providing a double-count of interviews for this region due to its proximity to Billy Bishop Toronto City Airport.



KEY INSIGHTS

1. **Approximately two in three Toronto residents are familiar with the Billy Bishop Toronto City Airport.** Overall familiarity with the airport has dropped ten percentage points since the 2018 survey (from 73% to 63%); however, current levels of familiarity are in line with 2016 survey results showing a slight fluctuation in familiarity over time.

2. **Two in five residents have flown from BBTCA in the past.** Those who have previously flown from Billy Bishop Airport are more likely to include residents of Old Toronto, York/East York, and the Waterfront, and as well as those who fall within the age group of 35-49.

3. **Seven in ten Torontonians express favourable opinions of BBTCA, with York/East York and Old Toronto residents most likely to express favourable opinions.** Favourability is linked to the airport's overall convenience in location.

4. **Of those who have previously flown from BBTCA, an overwhelming majority say they had a positive experience with the airport.** Over nine in ten residents who have flown from Billy Bishop Airport report a positive experience, with six in ten citing the Airport is "convenient and easy to access."

5. **The top reasons residents have not flown from Billy Bishop Airport include the inability to access certain destinations, not being a frequent flyer, and believing other airports provide more convenience.** These have remained the top reasons residents do not fly with Billy Bishop Airport since the 2016 survey.

KEY INSIGHTS

6 **Consistent with previous years, users of Billy Bishop Airport primarily report flying for leisure, rather than for business.** While seven in ten say they fly from Billy Bishop Airport for leisure trips, three in ten say they fly for business. Residents who fly from Billy Bishop Airport also articulate that their post-pandemic travel from the airport will likely be for personal/pleasure trips.

7 **A plurality of Torontonians agree with statements that Billy Bishop Airport's location "makes sense," and that the airport is a valuable asset to the city for business/the economy, tourism and healthcare.** A majority of residents (71%-87%) agree with statements provided in the survey that speak to the airport's positive impact on the city's ability to provide jobs, to facilitate business both domestically and abroad, to boost tourism, and to provide support for health care. Agreement with these impact statements coincide with the largely favourable opinions of Billy Bishop Airport found earlier in the survey.

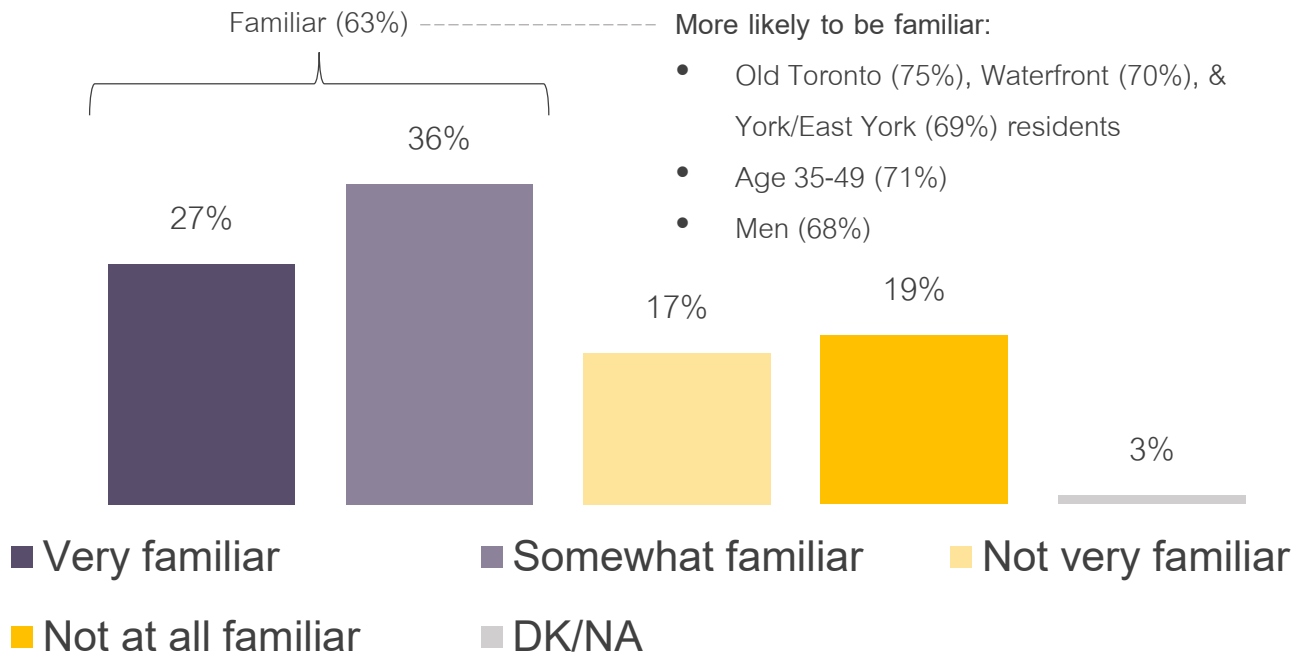
8 **Toronto residents say the Billy Bishop Airport's environmental impact is important to them, with widespread support for 'green' initiatives.** Nearly nine in ten Toronto residents (86%) articulate it is important to them that measures are taken by the Billy Bishop Airport to reduce environmental impact, with the same amount in favour of the introduction of new aircrafts that are quieter and better for the environment.

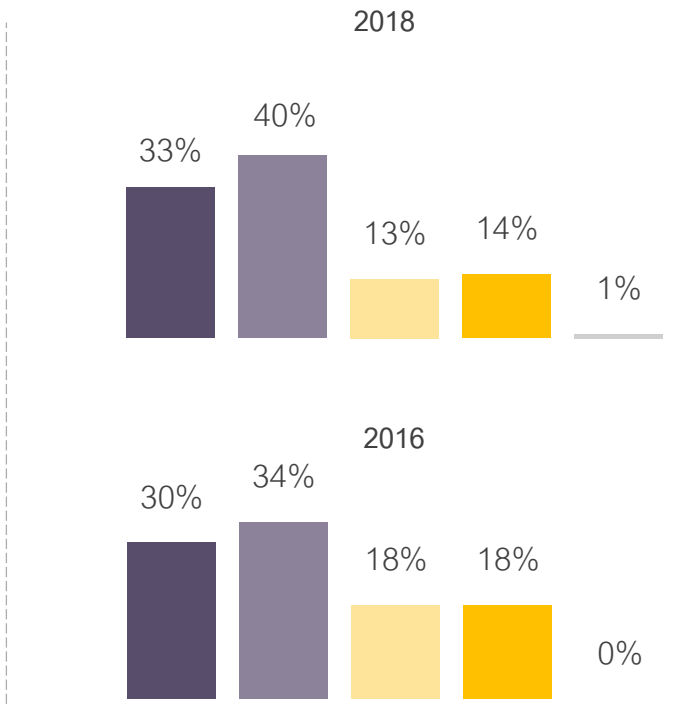
IMPRESSIONS & USAGE OF BILLY BISHOP AIRPORT

Familiarity with Billy Bishop Airport

Approximately two-thirds of Toronto residents say they are familiar with the Billy Bishop Airport, with one-quarter being "very" familiar. Residents of Old Toronto, Waterfront, and York/East York are more likely to express familiarity over other regions. The decline in familiarity may, in part, be attributed to travel limitations experienced during the COVID-19 pandemic.

Q1. How familiar are you with the Billy Bishop Toronto City Airport, which is located on Toronto Island near downtown? Are you … (N=1,225)

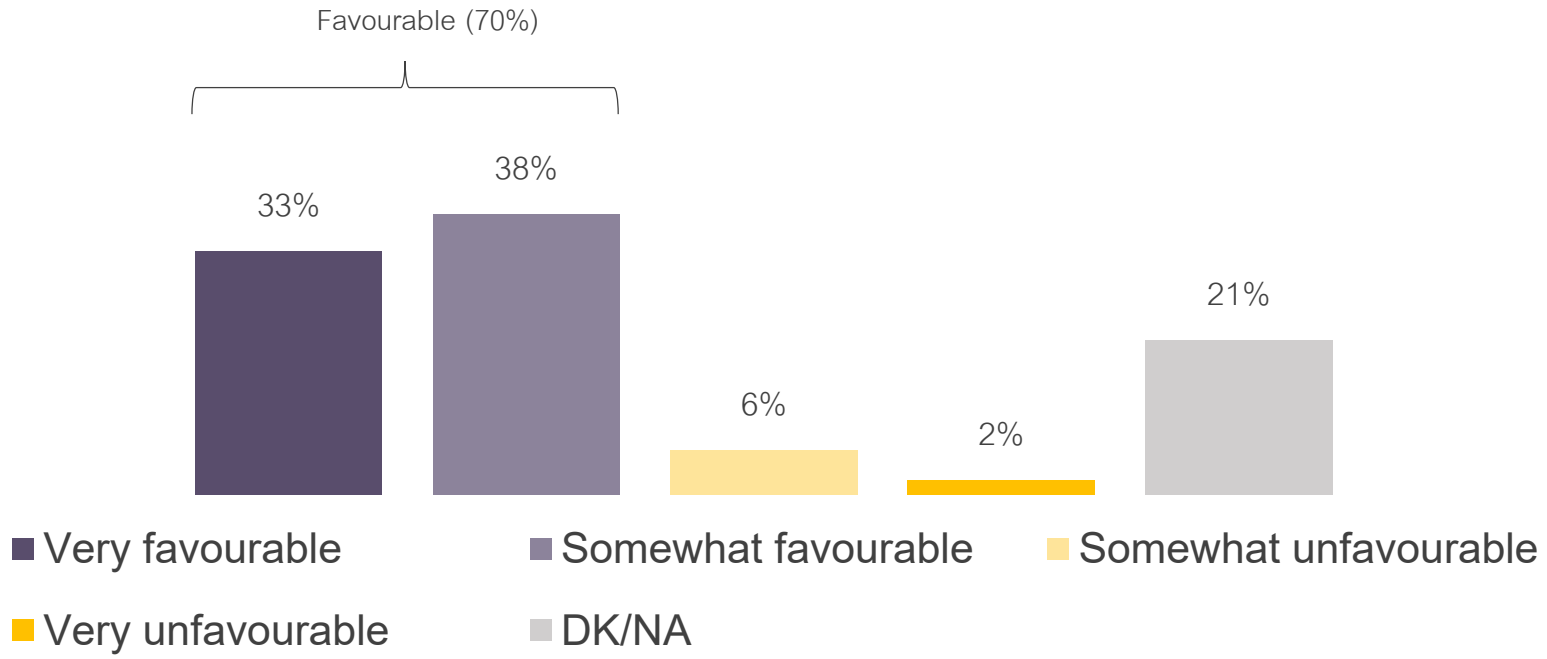


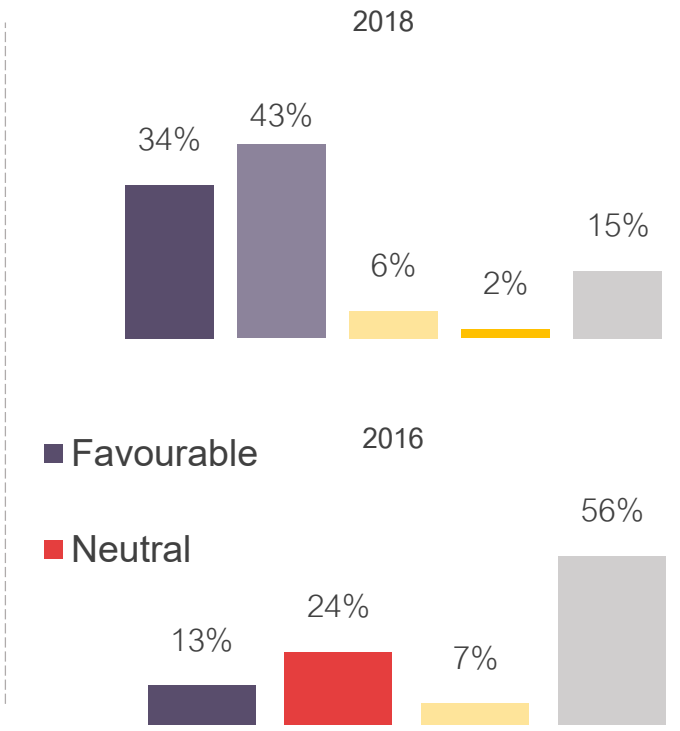


Impression of Billy Bishop Airport

Seven in ten Toronto residents hold either a “very” or “somewhat” favourable opinion of the Billy Bishop Airport, with residents of York/East York and Old Toronto being more likely to express favourability. While there is a decline in overall favourability from the 2018, there is a significant jump from 2016.

Q2. How favourable is your opinion of Billy Bishop Airport? Is it… (N=1,225)

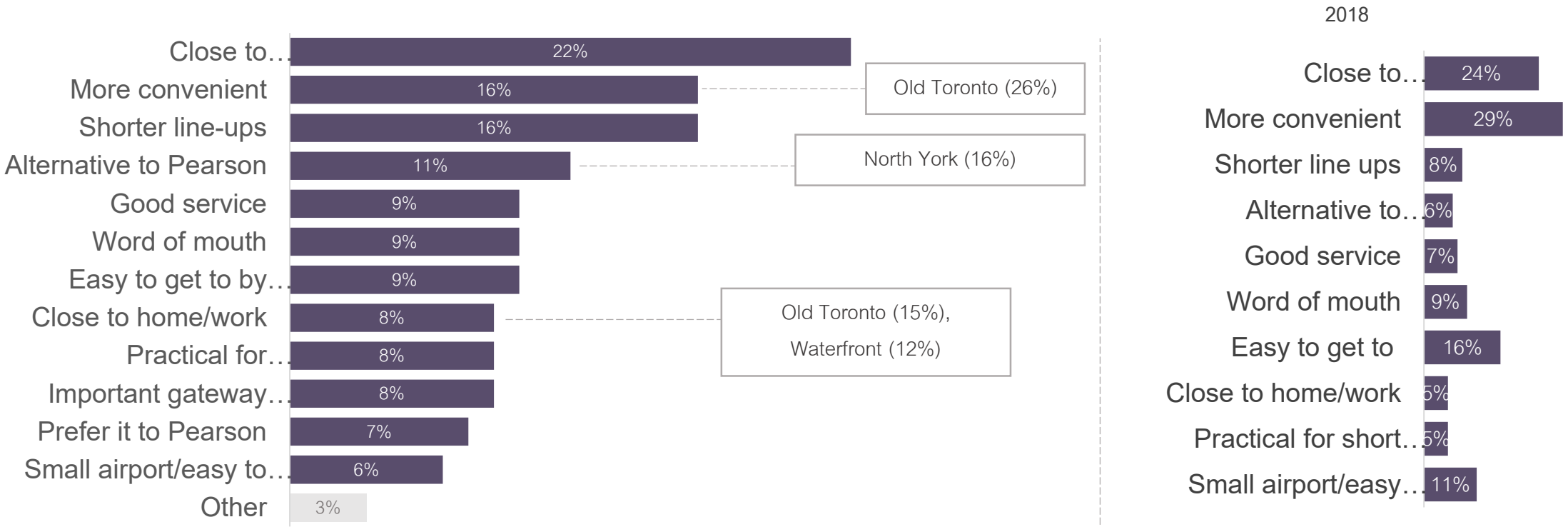




Reason for Favourable Impression

Proximity to downtown, convenience, and shorter line-ups are among the top reasons Toronto residents report a favourable opinion of Billy Bishop Airport. Proximity and convenience are top reasons for favourability shared with the previous survey in 2018.

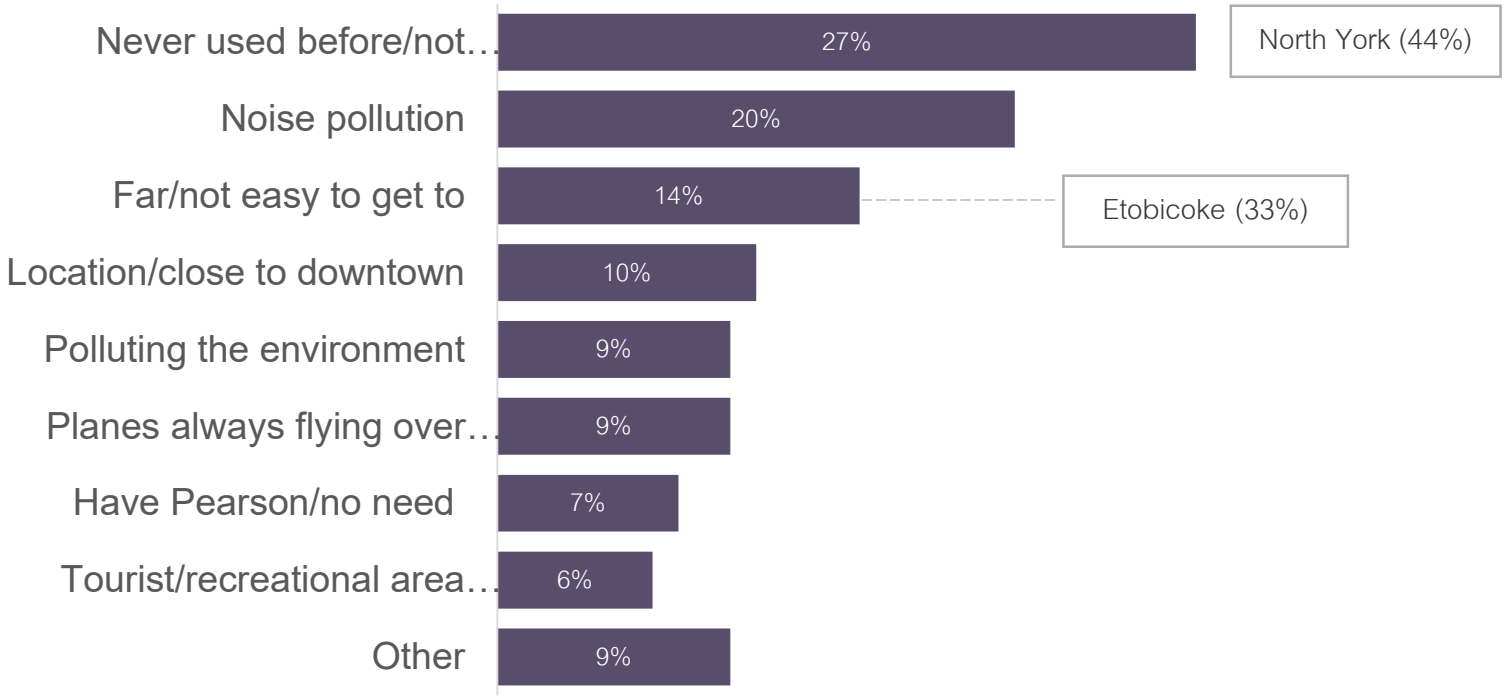
3a. What is the main reason you have a favourable impression of Billy Bishop Airport? Subsample: Those who report favourable impression with BBTCA (N=872)

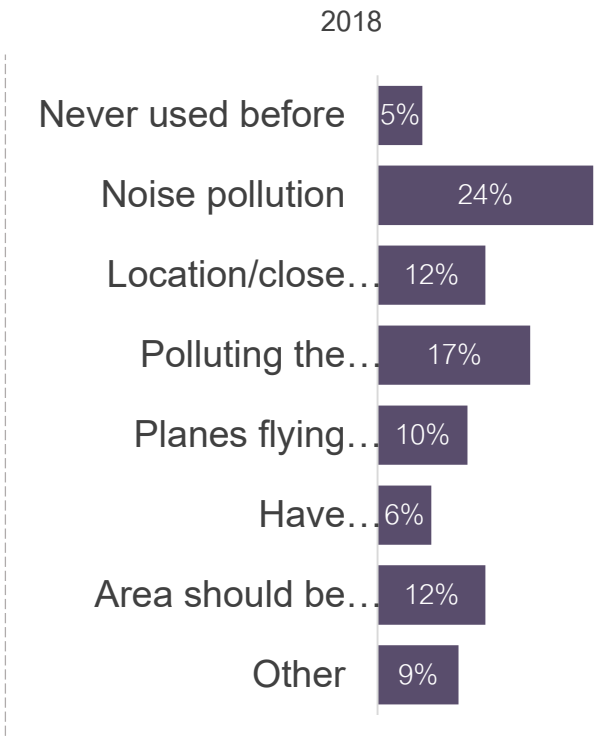


Reason for Unfavourable Impression

Of residents who report an unfavourable opinion of Billy Bishop Airport, one-quarter (27%) say it is due to never using the airport before/not being familiar with the airport. This is followed by two in ten who report it is due to noise pollution.

3b. What is the main reason you have an unfavourable impression of Billy Bishop Airport? Subsample: Those who report unfavourable impression with BBTCA (N=103)

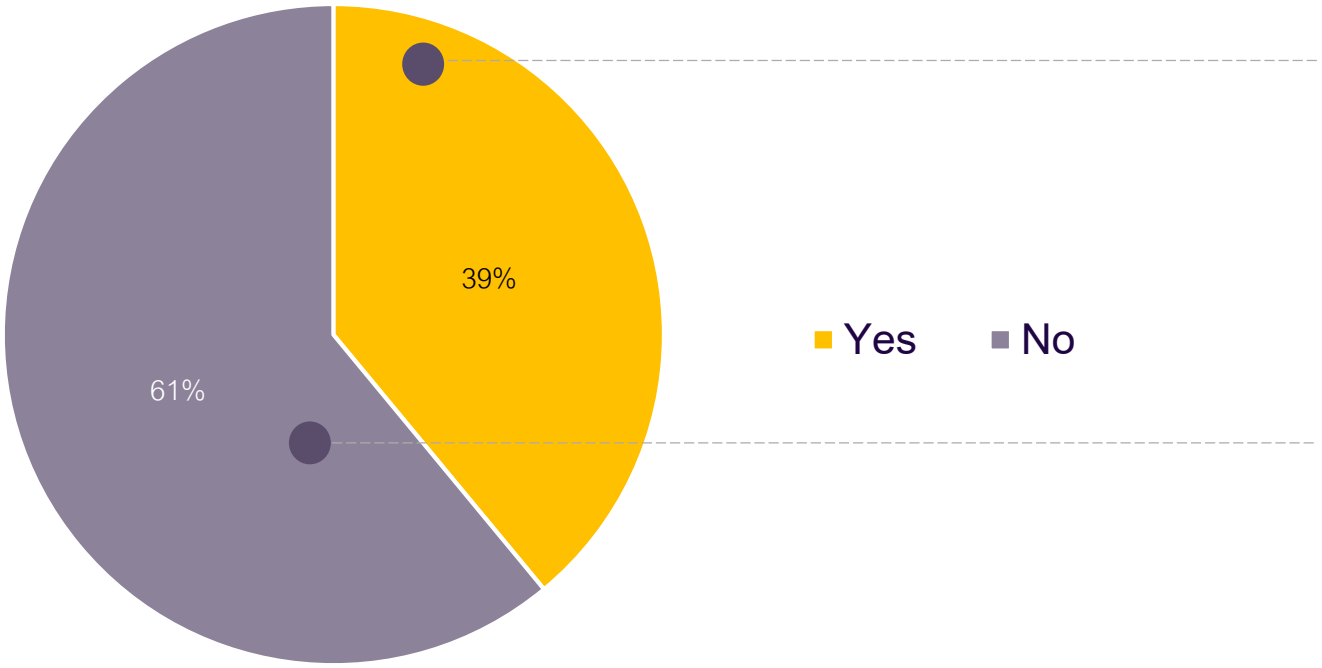




History with Billy Bishop Airport

Two in five Torontonians say they have flown from the Billy Bishop Airport in the past. Those who have previously flown from the Billy Bishop Airport are more likely to include residents of Old Toronto, York/East York, and the Waterfront regions.

Q4. Have you flown from Billy Bishop Airport before? (N=1,225)



More likely to have flown from Billy Bishop Airport before:

- Old Toronto (61%), York/East York (48%) & Waterfront residents (47%)
- Age 35-49 (54%)
- Men (42%)
- Child <18 at home (46%)
- 2SLGBTQ+ (52%)

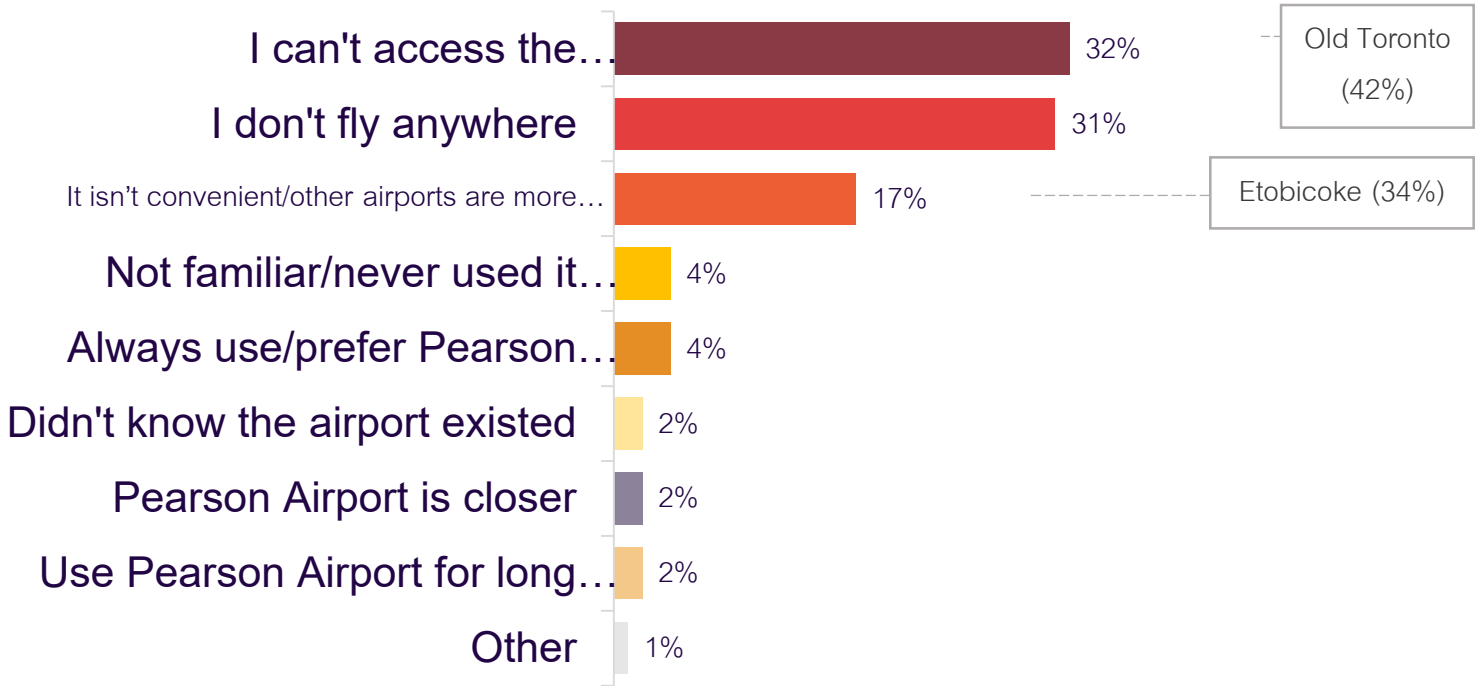
More likely to *not* have flown from Billy Bishop Airport before:

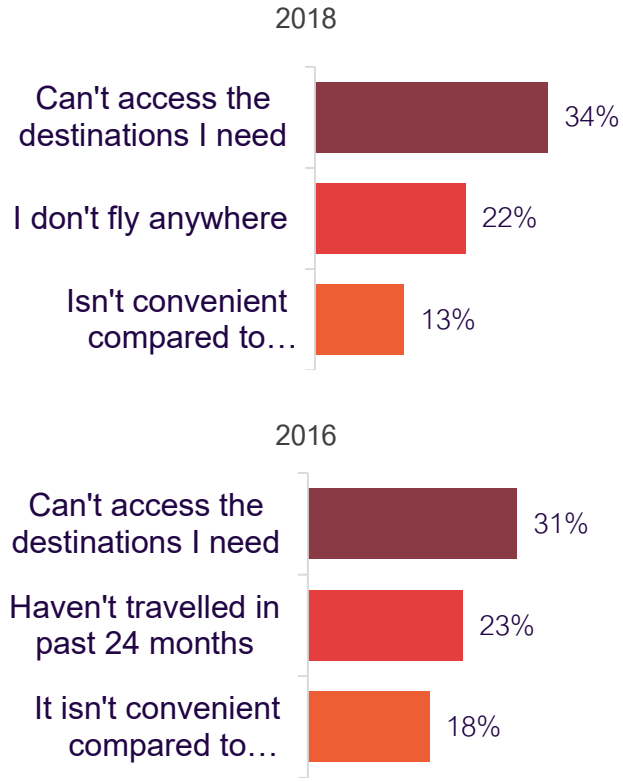
- Scarborough (79%), Etobicoke (73%) & North York residents (68%)
- Newcomers (76%)
- Black/Indigenous/POC (69%)
- Age 18-34 (68%)

Reasons for Not Using Billy Bishop Airport

The inability to access certain destinations is the top reason Toronto residents have not used the Billy Bishop Airport, with one in three specifying this. The top three reasons for not using the Billy Bishop Airport have remained unchanged since 2016.

Q5. What is the main reason you have not used that airport? Subsample: Those who have never flown out of Billy Bishop Toronto City Airport. (N=719)

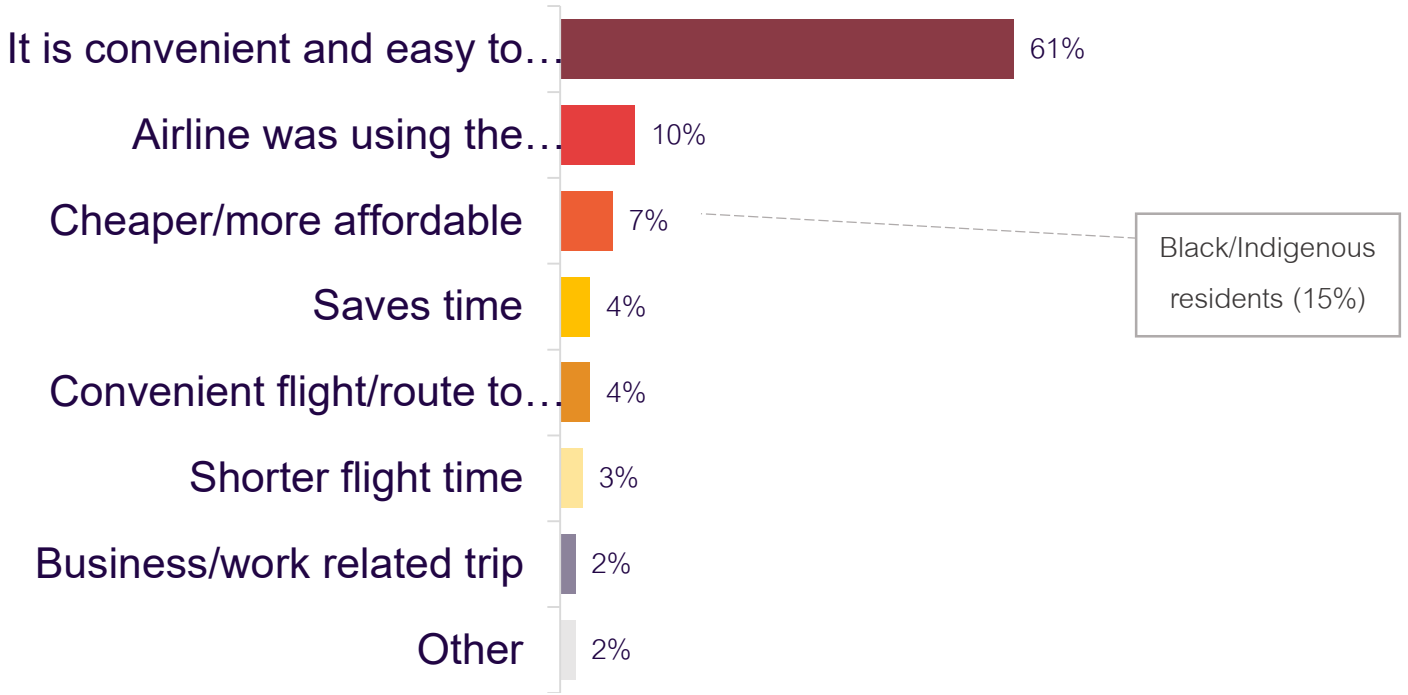


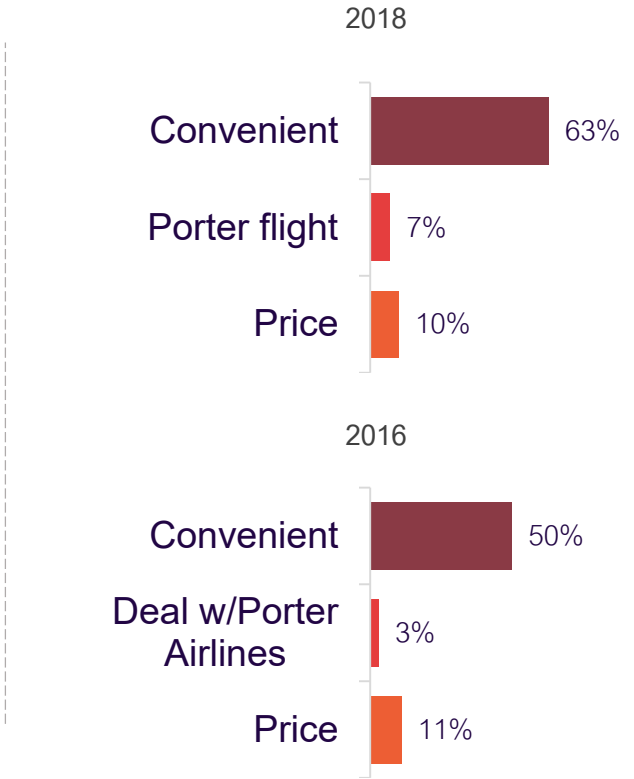


Reasons for Using Billy Bishop Airport

Three in five Toronto residents communicate the main reason they choose Billy Bishop Airport is due to its convenience. Choosing Billy Bishop Airport primarily for its convenience has been maintained by Toronto residents since the 2016 survey.

Q6. What is the main reason you choose this airport? Subsample: Those who have used Billy Bishop Toronto City Airport. (N=504)

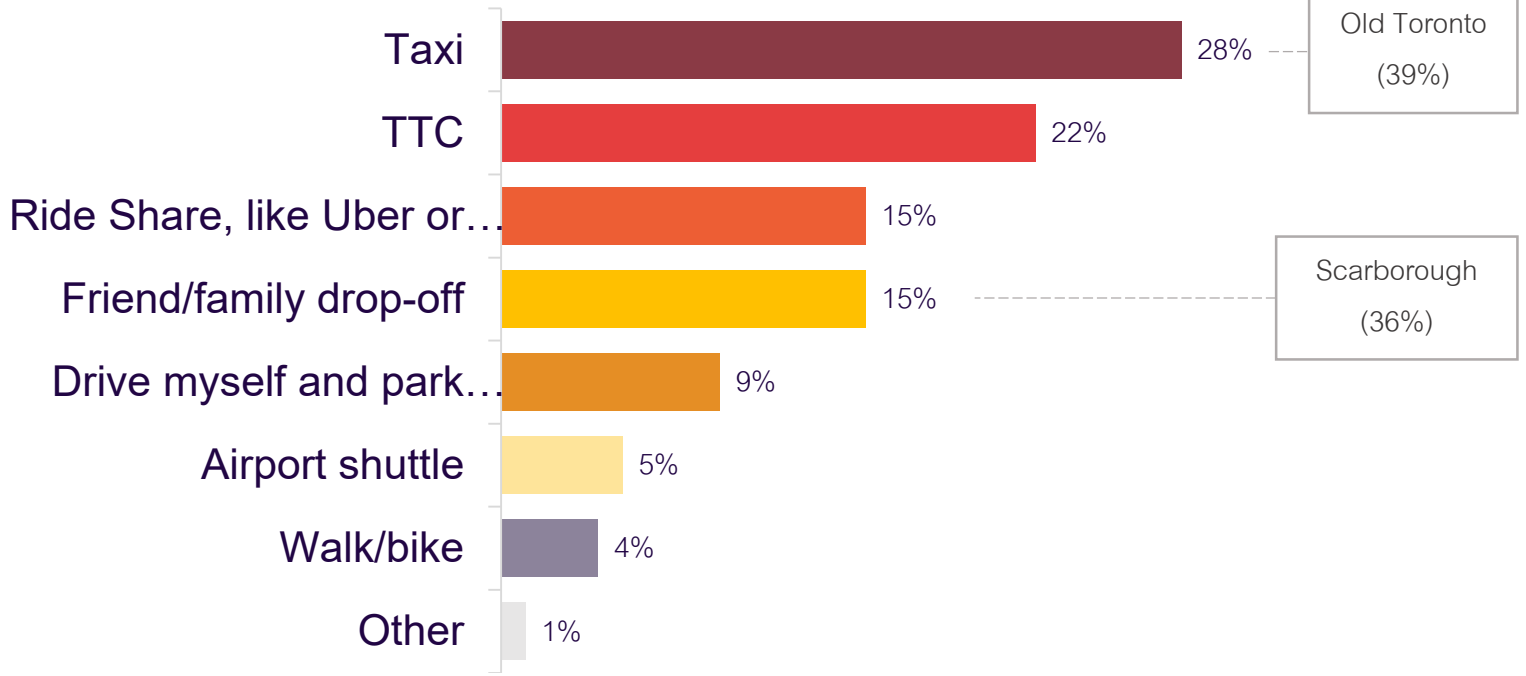


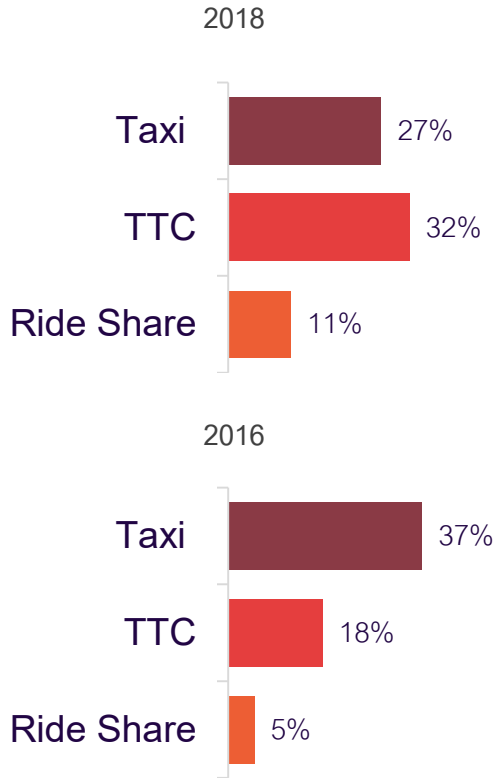


Methods of Getting to Billy Bishop Airport

Approximately three in ten residents get to the Billy Bishop Airport via taxi, with those from Old Toronto being the most likely to say this. Other primary methods of transportation to the airport include the TTC, ride shares, and a family/friend drop-off. Choosing ride shares as a transportation method has increased steadily over the years, while other methods such as taxis and the TTC show little change over time.

Q7. How do you typically get to Billy Bishop Airport? Subsample: Those who have used Billy Bishop Toronto City Airport. (N=504)

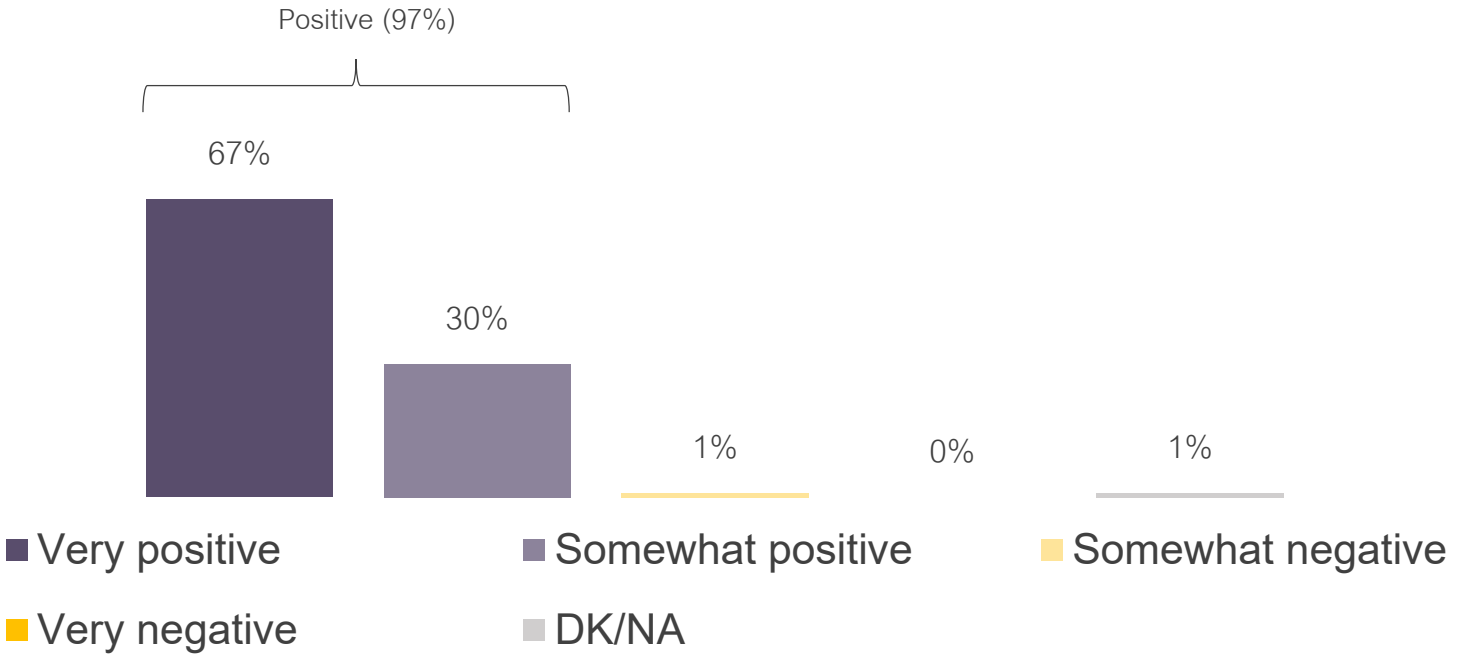


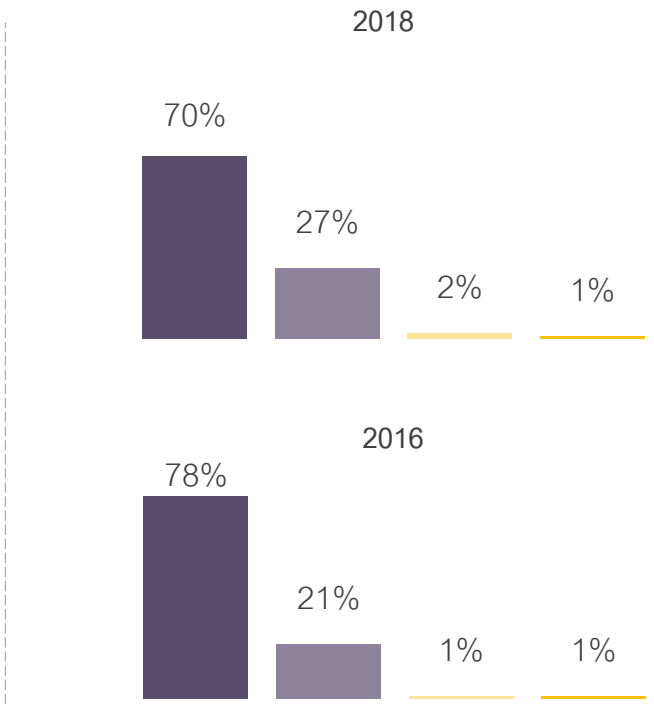


Rating Experience with Billy Bishop Airport

A strong majority of those who have flown with Billy Bishop Airport report positive experiences (97%), with two in three rating their experiences as “very positive.”

Q8. And how would you rate your overall experience using Billy Bishop Airport? Is it… Subsample: Those who have used Billy Bishop Toronto City Airport. (N=504)

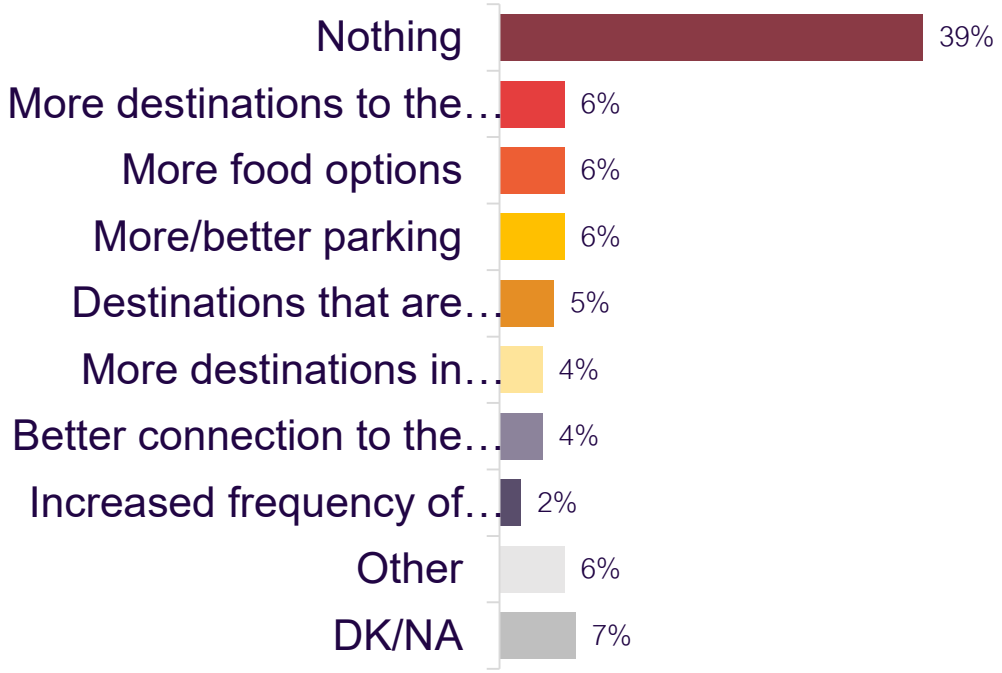


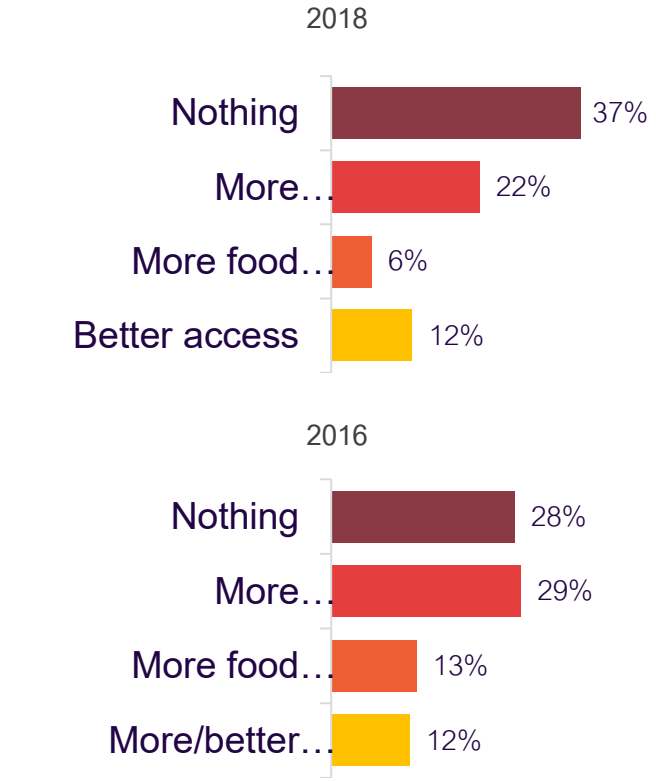


Suggestions for Improvement

Toronto residents continue to primarily suggest “nothing” would make the airport better (with two in five communicating this). Other top suggestions for improvement include adding more destinations to the U.S., more food options, and more/better parking.

Q9. What would make the airport better? Subsample: Those who have used Billy Bishop Toronto City Airport. (N=504)



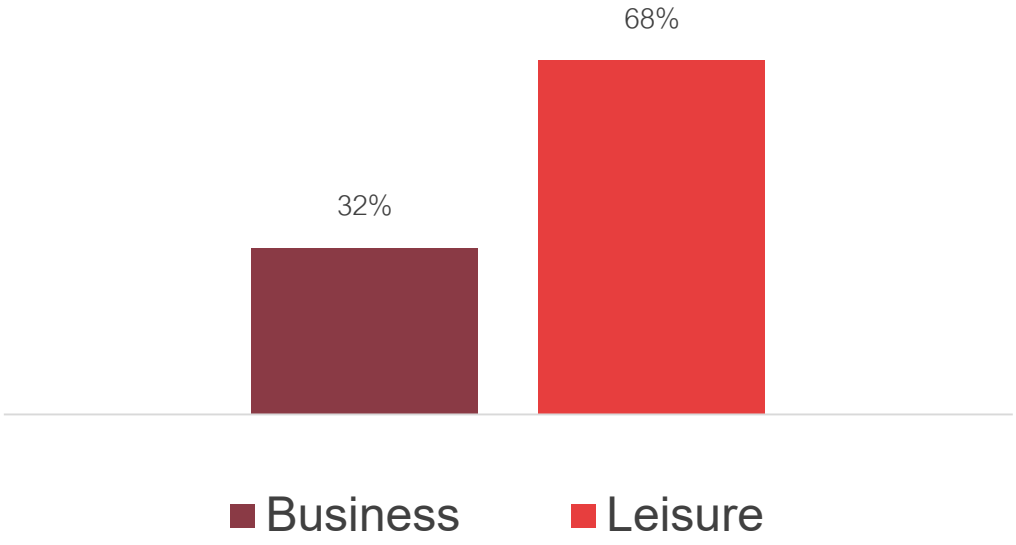


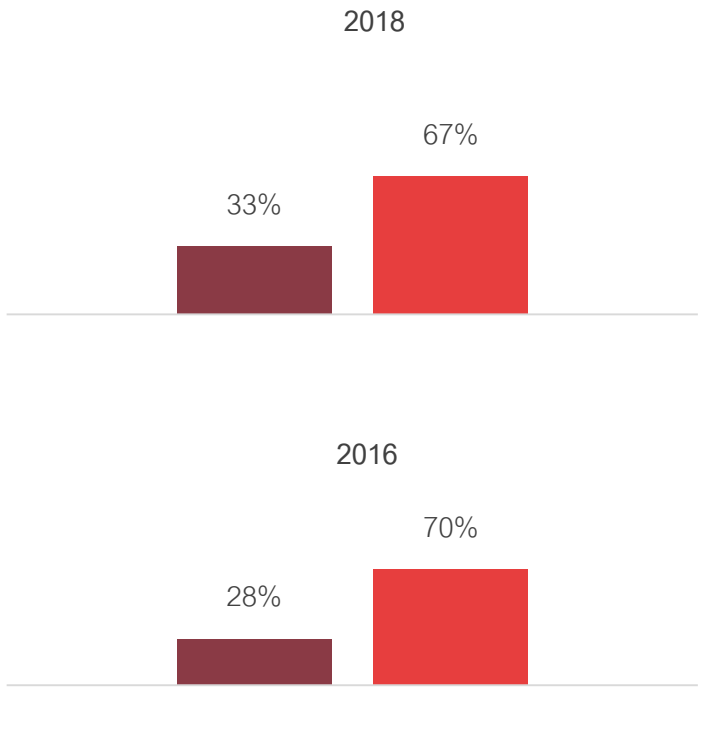
Business vs. Leisure Travel

Toronto residents who have flown through Billy Bishop Airport say three in ten of their trips are for business, and seven in ten of their trips are for leisure. These results are on par with both the 2018 and 2016 surveys.

Q10.-Q11. What percentage of your trips out of Billy Bishop Airport would you say are for business and what percentage would you say are for pleasure or personal use?

Subsample: Those who have used Billy Bishop Toronto City Airport. (N=504)

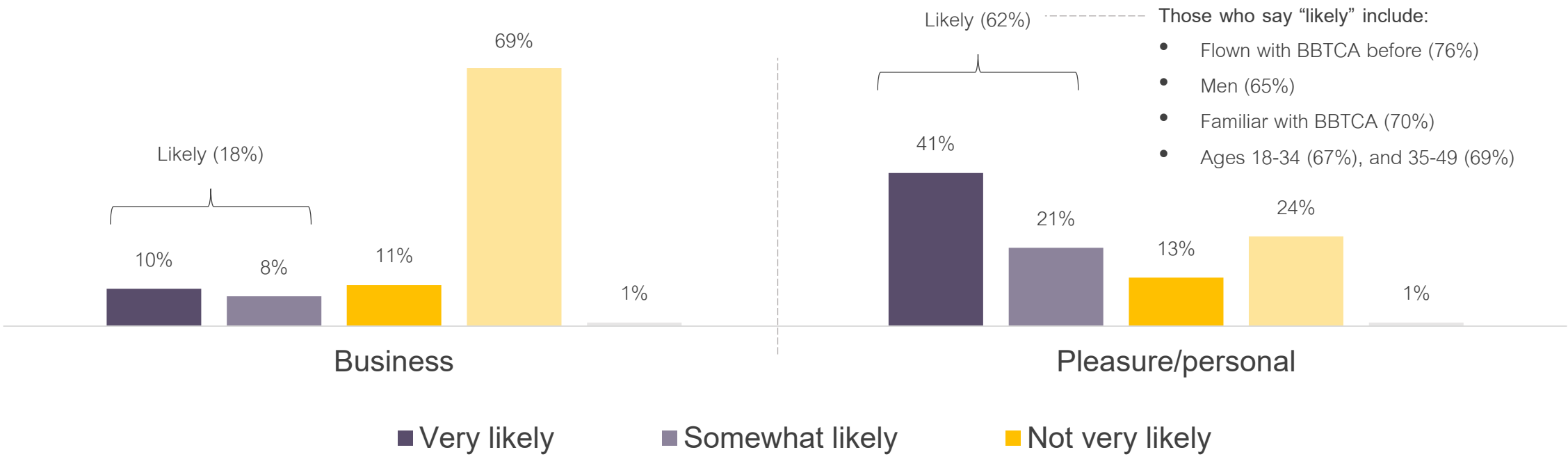




Likely Reason for Future Travel

When asked about post-pandemic travel, Toronto residents say they are more likely to book air travel for leisure (62%) rather than for business (18%). These results are consistent with widespread preference for leisure travel above business travel out of the Billy Bishop Airport prior to the onset of the pandemic.

Q12. As Canadians emerge from the impacts of the pandemic and consider activities like travel again, how likely are you personally to book air travel for the following reasons within the next six months: (N=1,225)

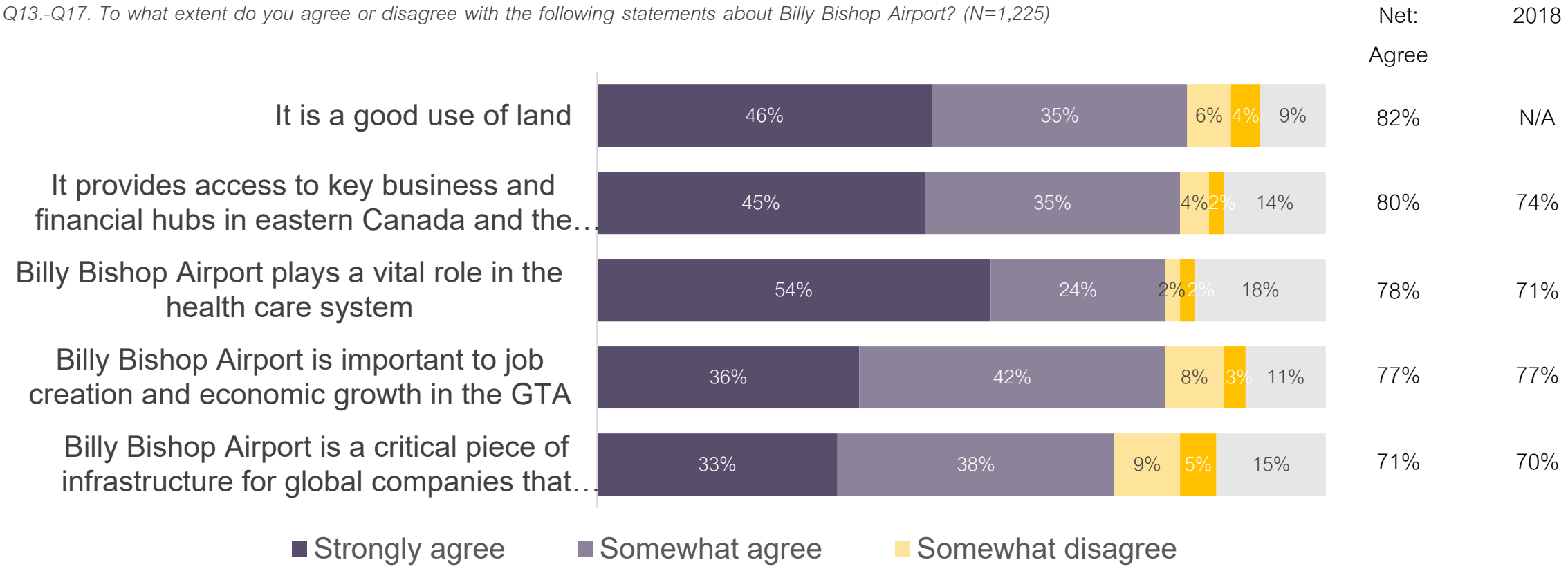


OPINIONS REGARDING A DOWNTOWN AIRPORT

Views Regarding Billy Bishop Airport

Most Toronto residents agree that Billy Bishop Airport is a good use of land, and that the airport plays a central role in business/the economy, health care, and job creation for the city. Agreement with statements regarding Billy Bishop Airport show little difference from the previous wave of the survey.

Q13.-Q17. To what extent do you agree or disagree with the following statements about Billy Bishop Airport? (N=1,225)

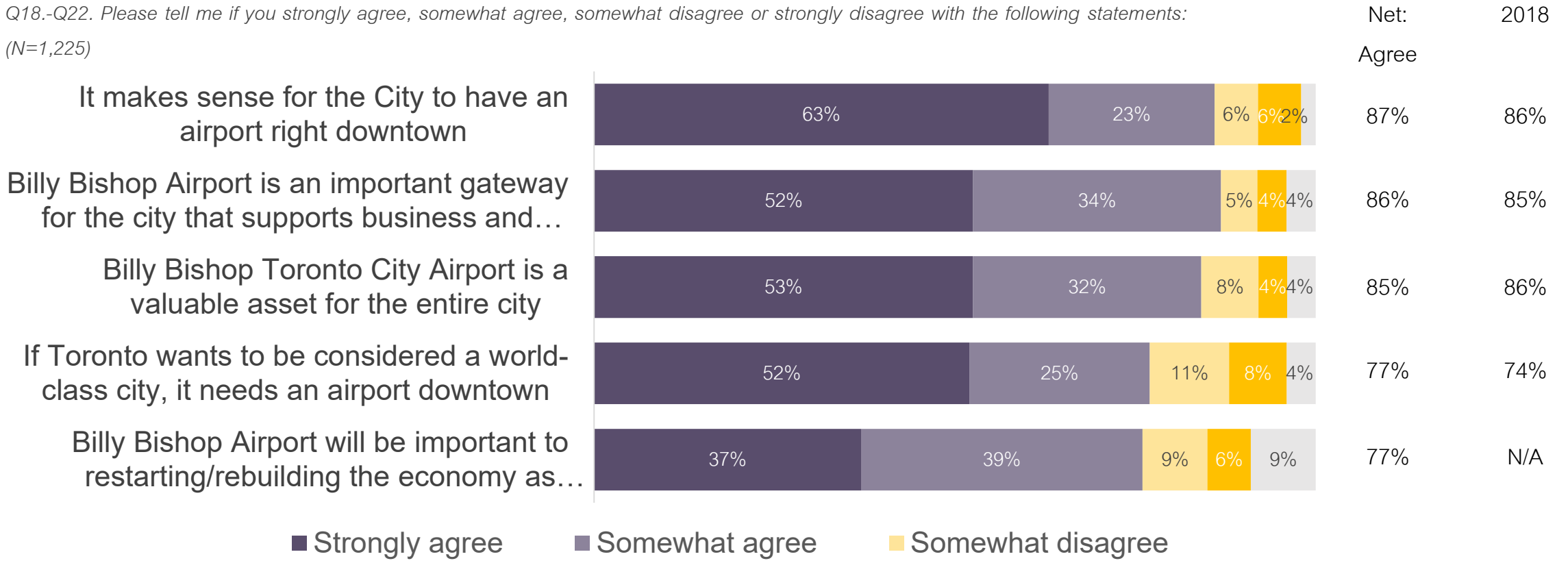


Statements Regarding Billy Bishop Airport

A strong majority of Toronto residents agree with statements about Billy Bishop Airport that say the airport location "makes sense," and that it is an asset to the city regarding tourism, business/the economy, and international perception. Agreement with these statements has remained consistent with 2018 survey results.

Q18.-Q22. Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements:

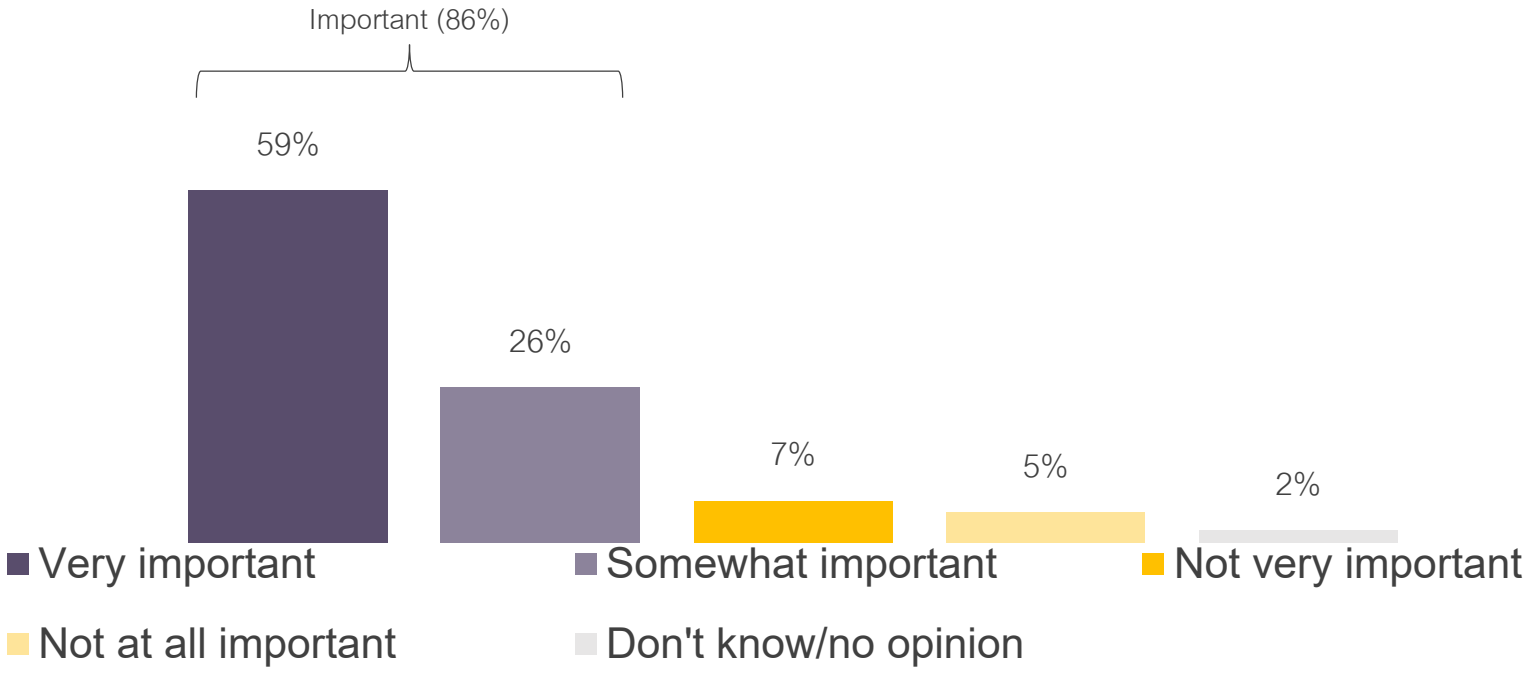
(N=1,225)



Environmental Impact

Over eight in ten Toronto residents (86%) articulate it is important to them that measures are taken by the Billy Bishop Airport to reduce environmental impact. Those who say it is “very important” are more likely to include Old Toronto (64%) and Waterfront residents (63%), women (67%), as well as those age 50-64 (64%).

Q23. As a downtown airport, Billy Bishop Airport is committed to become cleaner, greener and quieter and operating in an environmentally sustainable matter… How important is it for you that measures like these are being taken to reduce the airport’s environmental impact? (N=1,225)



Most likely to say important:

- Old Toronto (92%) & Scarborough (89%) residents
- Favourable opinion of BBTCA (89%)
- Women (88%)
- Newcomers (93%), 2SLGBTQ+ (94%), and Black/Indigenous (91%)

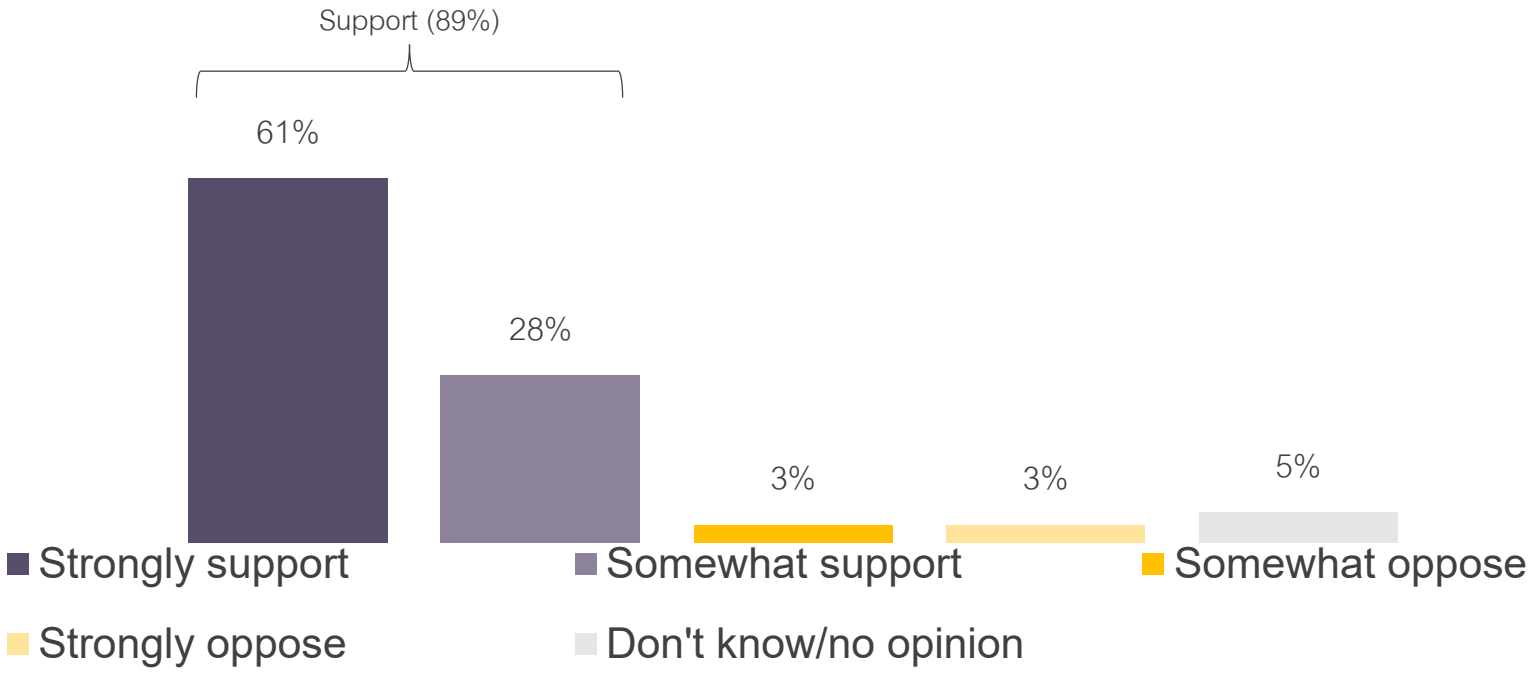
Most likely to say *not* important:

- Unfavourable opinion of BBTCA (22%)
- Men (16%)

Support of Environmentally-Friendly Aircraft

There is strong support among Toronto residents (89%) for the introduction of new aircrafts that are quieter and better for the environment at Billy Bishop Airport.

Q24. There have been advancements in technology that have resulted in new aircrafts that are quieter and better for the environment… Would you support or oppose the introduction of these types of aircraft, in addition to those currently permitted, for use at the Billy Bishop Airport? (N=1,225)



Most likely to support:

- Old Toronto residents (94%)
- Age 35-49 (94%)
- Household income of $60K+ (93%)
- Favourable opinion of BBTCA (93%)

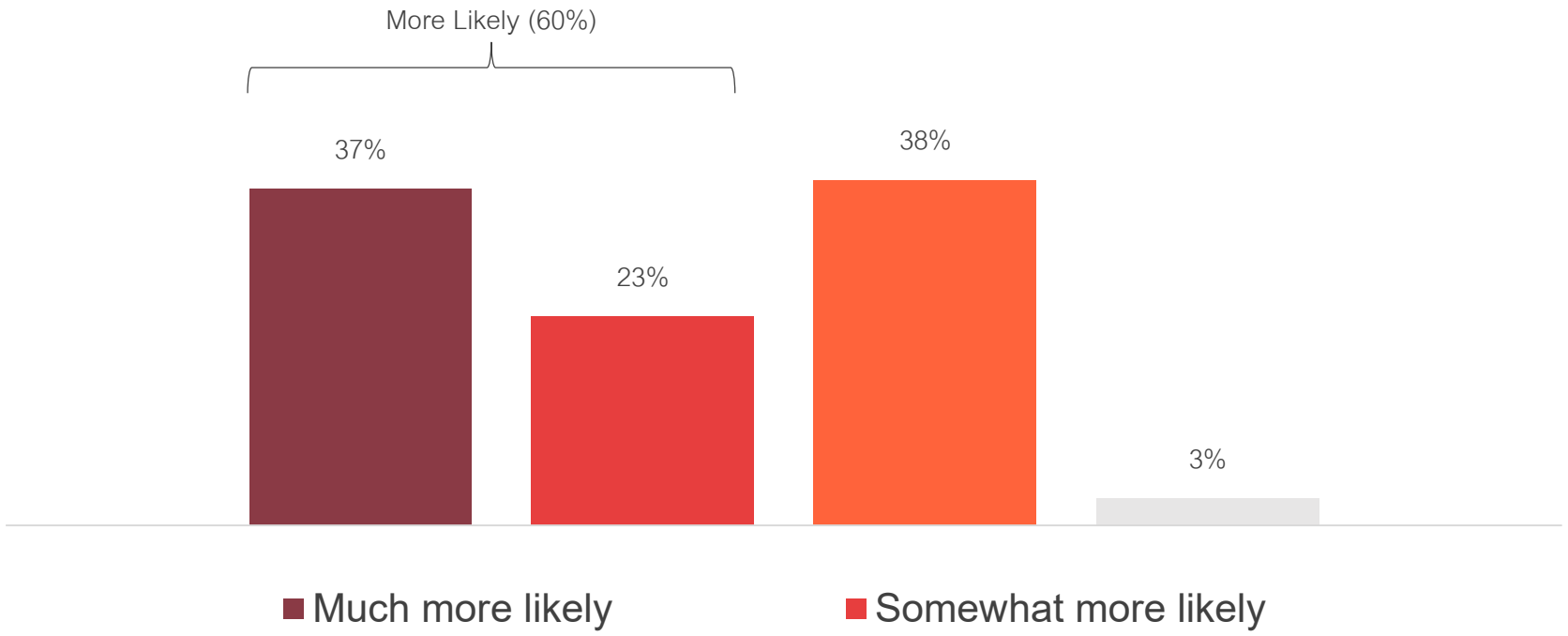
Most likely to oppose:

- Men (8%)

Usage of Public Transport to Billy Bishop Airport

Three in five Torontonians say they are more likely to utilize public transit to get to Billy Bishop Airport if it became more convenient, with approximately two in five saying “much more likely.”

Q25. How likely are you to use public transit to get to Billy Bishop Airport if it were more convenient than it is now? (N=1,225)



Those who say “much more likely”:

- Child <18 at home (48%)
- Familiar with BBTCA (42%)
- Those aged 18-34 (42%) and 35-49 (45%)

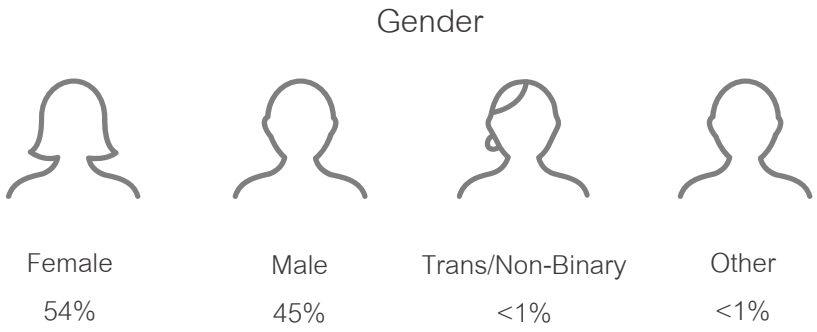
Those who say “*not* more likely/no change”:

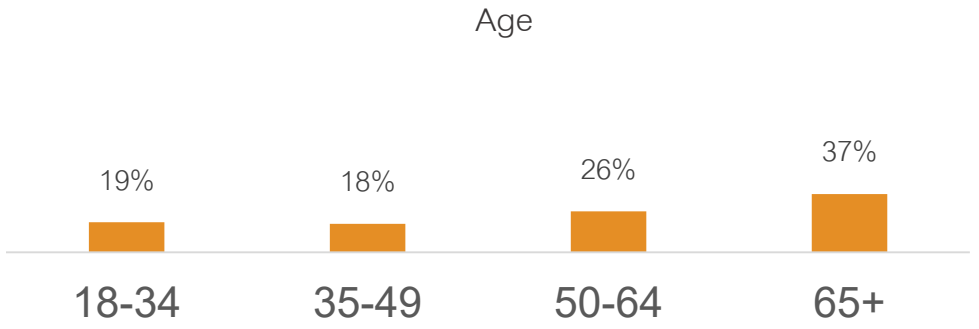
- Age 65+ (45%)
- Not familiar with BBTCA (44%)

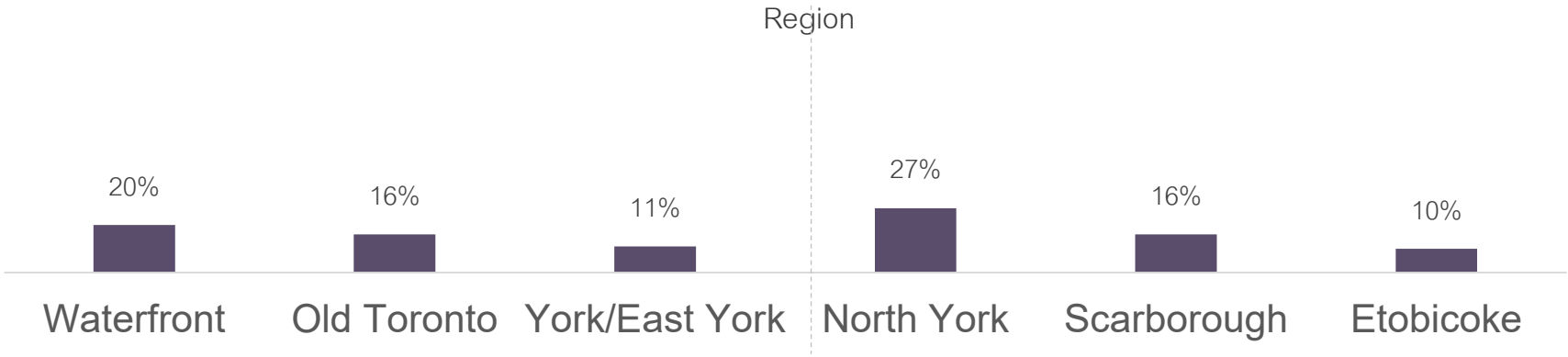
DEMOGRAPHICS

Demographics

Below are demographic details of the survey participants:



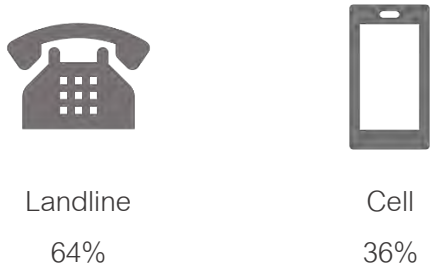




Demographics

Below are demographic details of the survey participants:

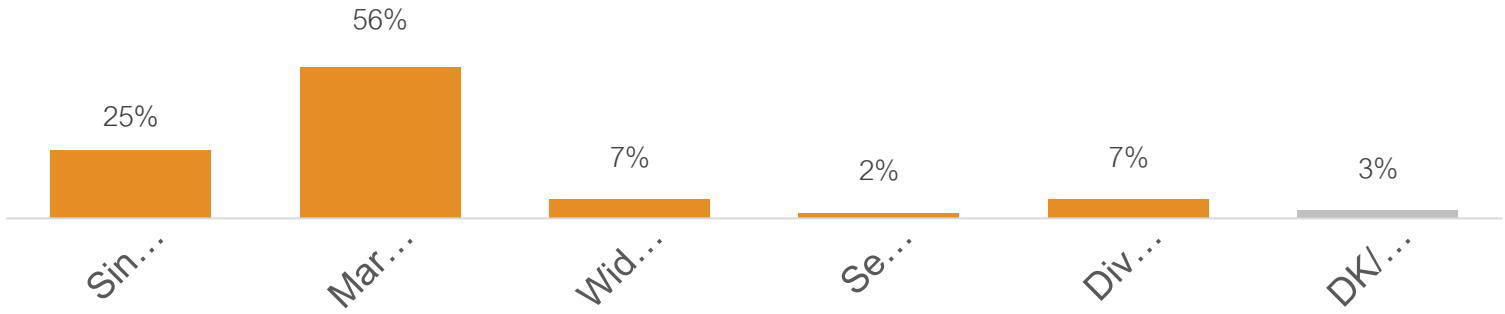
Sample Source



Landline
64%

Cell
36%

Relationship Status



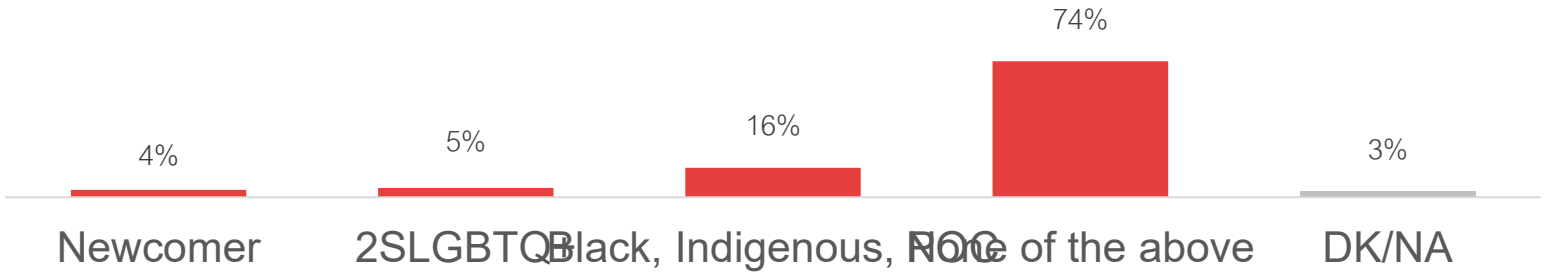
Child/Children Under 18 in Household



Yes
20%

No
77%

Minority Group



Thank You

Appendix C.2 – PortsToronto Presentation on 2022 Public Opinion Survey: Focused Report on Spadina-For York

Included as supplementary material upon request from CLC members.
Not presented at the CLC meeting.

PORTS TORONTO

PORTS TORONTO PUBLIC OPINION SUVEY: FOCUSED REPORT



A SURVEY OF TORONTO RESIDENTS WITH A FOCUS ON SPADINA-FORT YORK
FINAL REPORT | OCTOBER, 2022

ENVIRONICS RESEARCH

TABLE OF CONTENTS

OBJECTIVE AND RESEARCH METHODS 04

DEMOGRAPHIC PROFILE OF SPADINA-FORT YORK RESPONDENTS 06

IMPRESSIONS & USAGE OF BBTCA 11

OPINIONS REGARDING A DOWNTOWN AIRPORT 23

DEMOGRAPHICS 29

INTRODUCTION: OBJECTIVE & METHODS

The objective of this study is to measure client and resident satisfaction with and usage of the Billy Bishop Toronto City Airport.

To support this objective, PortsToronto commissioned Environics Research to conduct a public satisfaction survey of Torontonians to better understand their familiarity and perceptions of the airport. Additionally, the survey collects opinions on how experiences with the airport can be improved, and on proposed measures to reduce environmental impact.

RESEARCH METHODS

The following report is based on results from a Spring 2022 public opinion telephone survey that gauges the Toronto residents' attitudes toward and experiences with PortsToronto's Billy Bishop Toronto City Airport (BBTCA).

This 15-minute telephone (CATI) survey was conducted from May 5th - June 8th, 2022, among a random and representative sample of N=1,225 residents aged 18 years and older. The margin of error for this survey's full sample size is ± 2.8% points, 19 times out of 20.

As a continuation of public satisfaction surveys for PortsToronto executed by Environics Research, the 2022 survey was structured to highlight comparisons of responses from previous years' questions, where applicable. Due to the new definition of waterfront created this wave, comparisons to prior answers provided by Spadina-Fort York residents cannot be made.

Results are expressed as percentages unless otherwise noted. Results may not add to 100% due to rounding or multiple responses. Net results cited in text may not exactly match individual results shown in charts due to rounding.

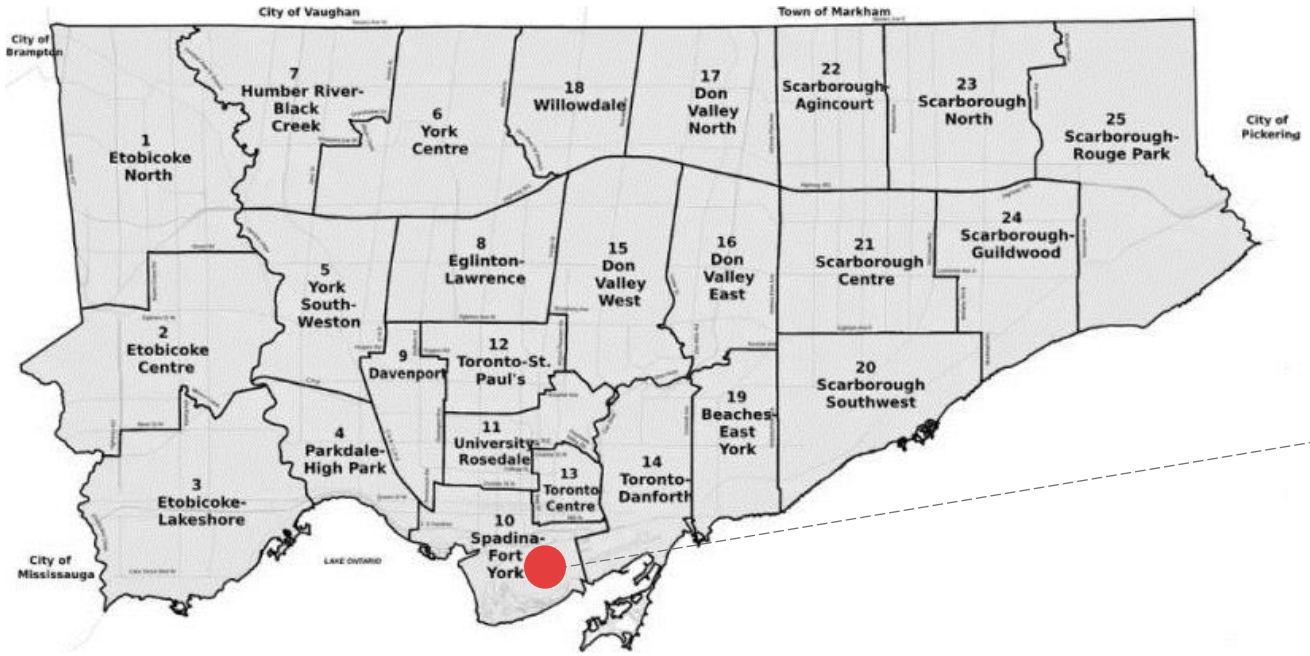
A SPECIAL NOTE ON THIS REPORT: This report is intended to draw attention to the responses that were provided by Spadina-Fort York residents. The margin of error on these call-outs is ± **9.9%** points. This report has been designed to showcase where responses align with the general population in the City of Toronto, and where they differ.

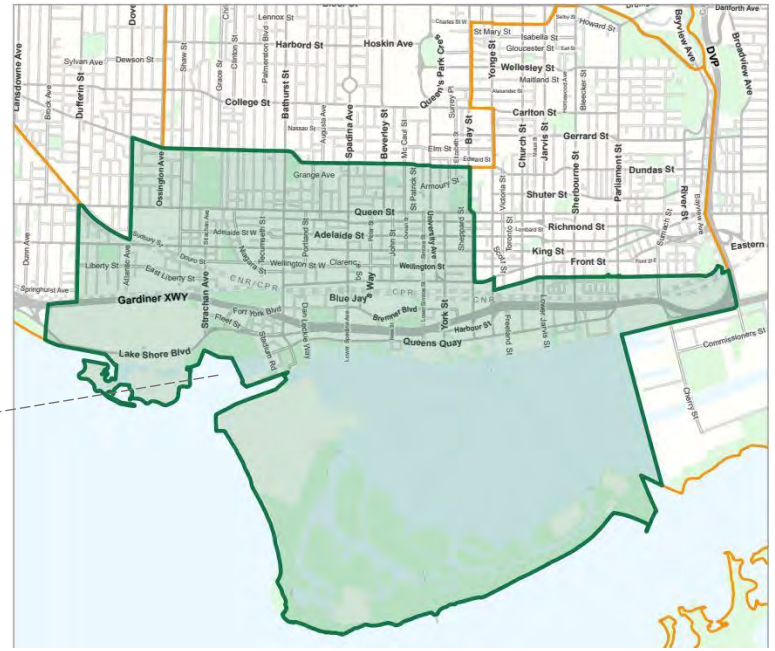
DEMOGRPAHIC PROFILE OF SPADINA-FORT YORK RESPONDENTS

PortsToronto | **Spadina-Fort York – Regional Boundaries**

The maps below outline the survey's Spadina-Fort York region, modeled after the City of Toronto's 10th Ward. The region's northern boundary reaches Dundas St., Dufferin St. in the West and the DVP to the East. Its southern boundary reaches Lake Ontario.

Subsample: Spadina-Fort York respondents (N=96)





CITY OF TORONTO WARD MAP AND WARD 10 MAP FROM TORONTO.CA.

PortsToronto | **Spadina-Fort York – Demographic Profile**

The respondents to this survey who reside in the Spadina-Fort York Region are more likely to be young, identify with an equity-seeking group, and are more likely to have used the BBTCA.

Subsample: Spadina-Fort York respondents (N=96)

YOUNG
One-quarter of Spadina-Fort York respondents are between the ages 18-34; one in five are within the 35-49 age range.

DIVERSE
One in three belong to an equity-seeking group such as: Newcomer (arrived to Canada in last 5 years); 2SLGBTQ+; and/or Black, Indigenous or POC.

AWARE OF & FREQUENTLY USE BBTCA
Four in five are familiar with BBTCA; approximately one-half have previously flown with the airport.

HIGHLY POSITIVE EXPERIENCES WITH BBTCA
Of those who have previously flown with BBTCA, 98% report a positive experience.

CONCERNED FOR ENVIRONMENT
Over one in three walk or bike to the airport, and 85% say it's important the airport takes measures to reduce environmental impact.

REGION SPECIFICS
FSAs*/Postal codes found within Spadina-Fort York boundaries:

- M5A
- M5E
- M5G
- M5H
- M5J
- M5K
- M5L
- M5T
- M5V
- M5W
- M5X
- M6K
- M6J

*"A forward sortation area (FSA) is a way to designate a geographical unit based on the first three characters in a Canadian postal code. All postal codes that start with the same three characters—for example, K1A—are together considered an FSA." (https://www.ic.gc.ca/)

PortsToronto | **Spadina-Fort York – Demographic Profile**

Below is the detailed demographic profile of survey participants **residing in the Spadina-Fort York region.**

Subsample: Spadina-Fort York respondents (N=96)

Gender

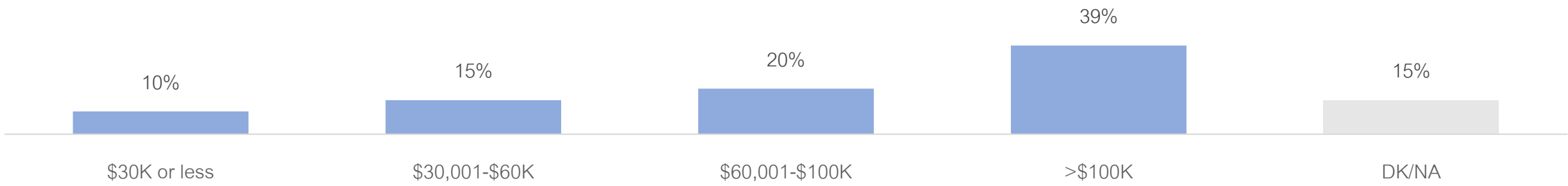


Female	Male	Trans/Non-Binary	Other
53%	47%	<1%	<1%

Age



Household Income



PortsToronto | **Spadina-Fort York – Demographic Profile**

Below is the detailed demographic profile of survey participants **residing in the Spadina-Fort York region.**

Subsample: Spadina-Fort York respondents (N=96)

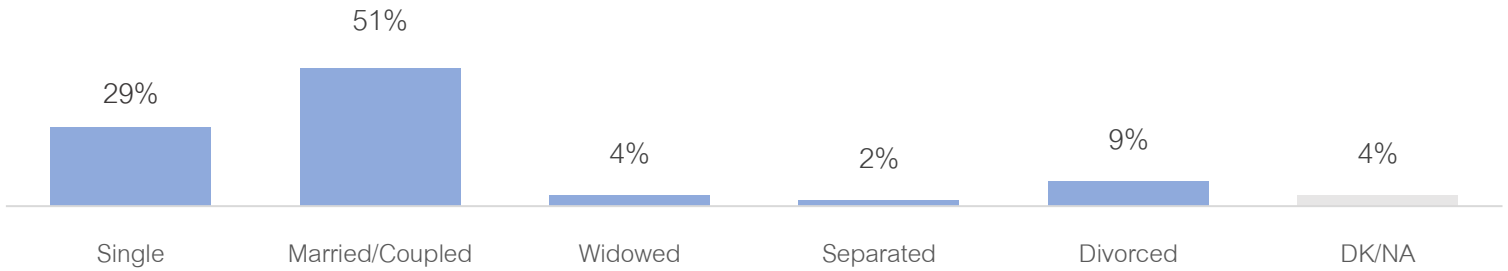
Sample Source



Landline 41%

Cell 59%

Relationship Status



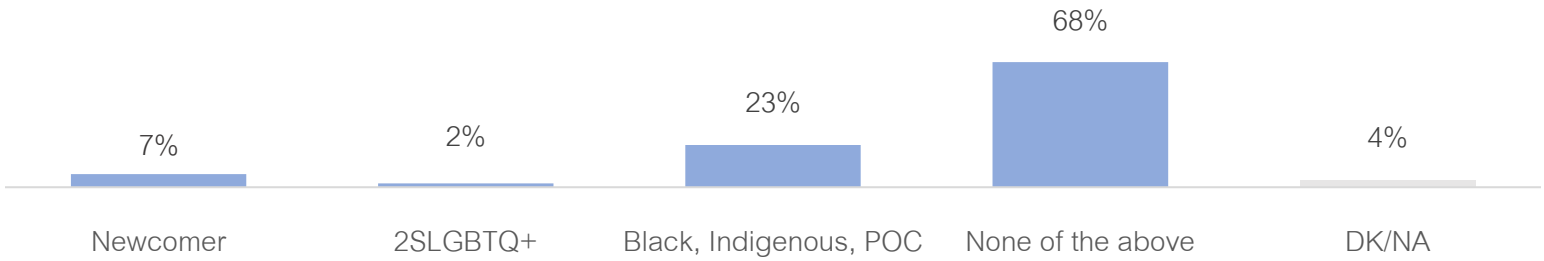
Child/Children Under 18 in Household



Yes 20%

No 80%

Minority Group

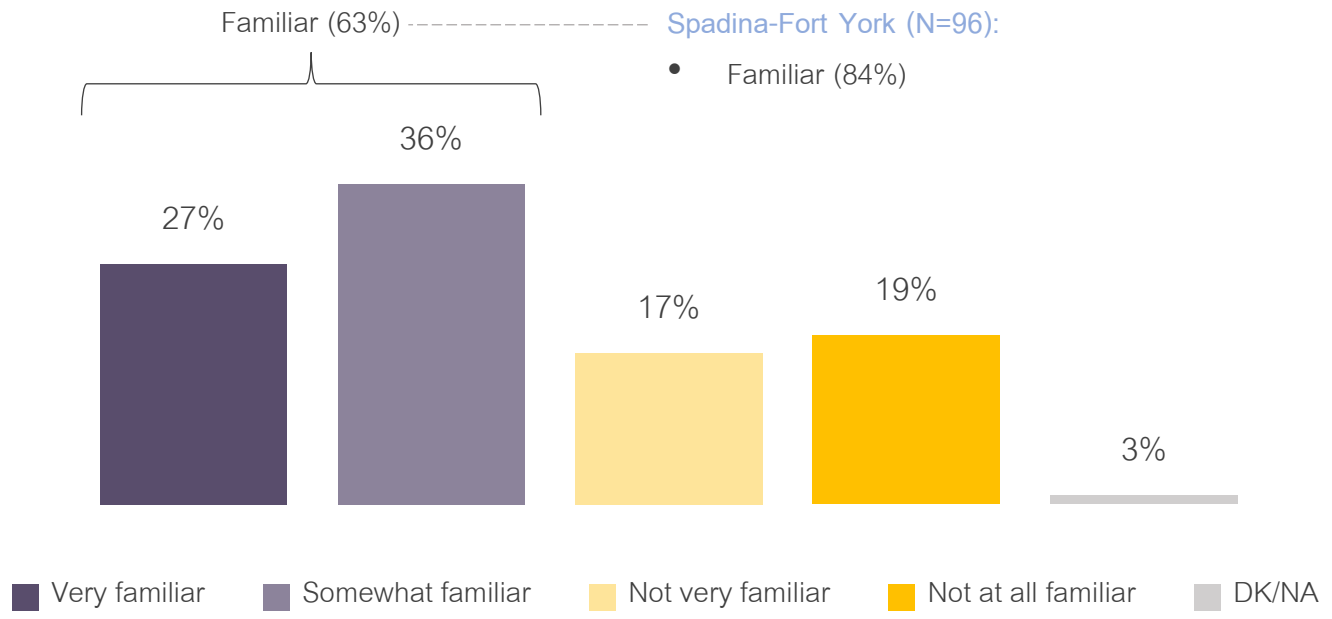


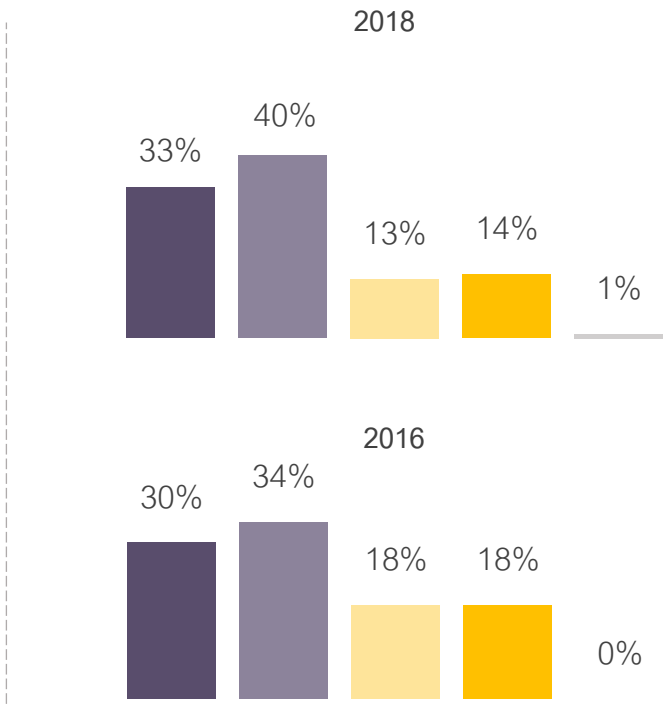
IMPRESSIONS & USAGE OF BILLY BISHOP AIRPORT

Ports Toronto | **Familiarity with BBTCA**

Approximately two-thirds of Toronto residents say they are familiar with the Billy Bishop Airport, with one-quarter being "very" familiar. Residents of Old Toronto, Waterfront, and York/East York are more likely to express familiarity over other regions, as well as residents aged 35-49, and men. The decline in familiarity may, in part, be attributed to travel limitations experienced during the COVID-19 pandemic.

Q1. How familiar are you with the Billy Bishop Toronto City Airport, which is located on Toronto Island near downtown? Are you … (N=1,225)

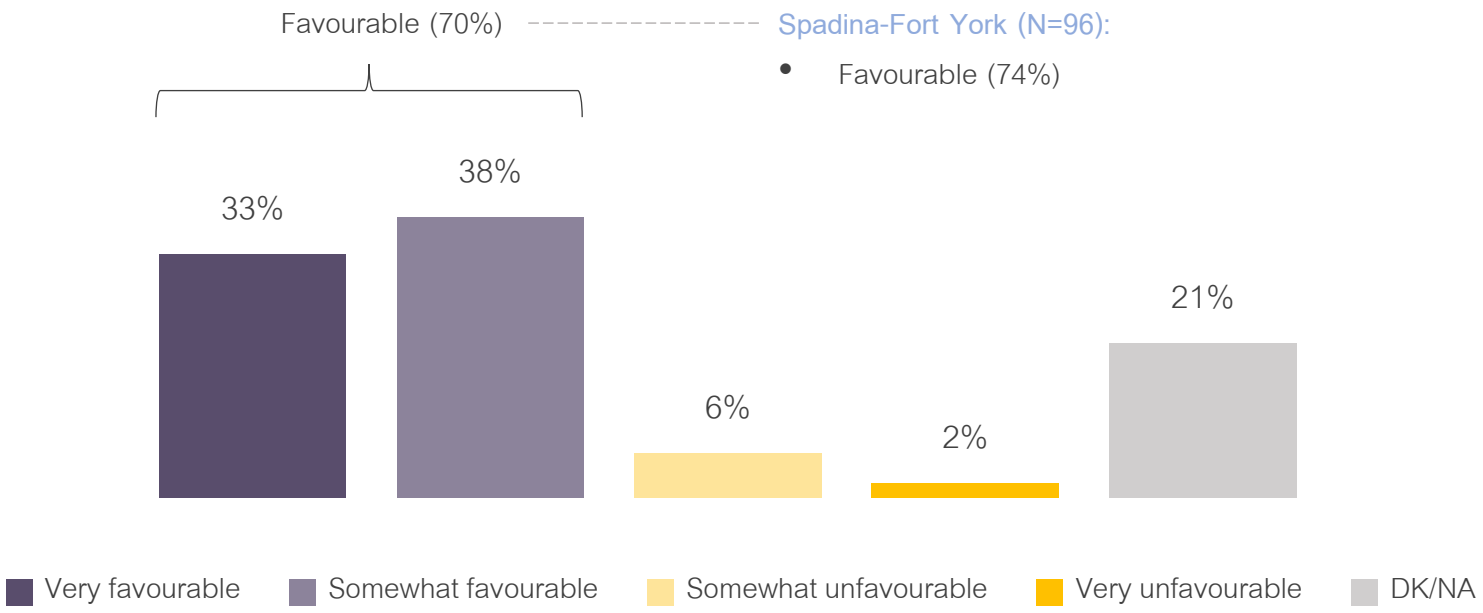


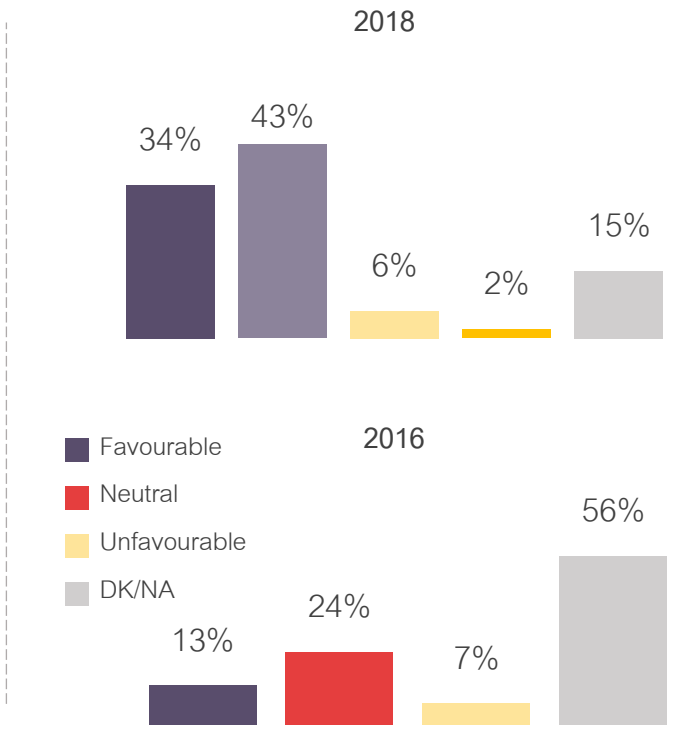


PortsToronto | **Impression of BBTCA**

Seven in ten Toronto residents hold either a “very” or “somewhat” favourable opinion of the Billy Bishop Airport, with residents of York/East York and Old Toronto, men, as well as those with a household income of over $100K being more likely to express favourability. While there is a decline in overall favourability from the 2018, there is a significant jump from 2016.

Q2. How favourable is your opinion of Billy Bishop Airport? Is it… (N=1,225)

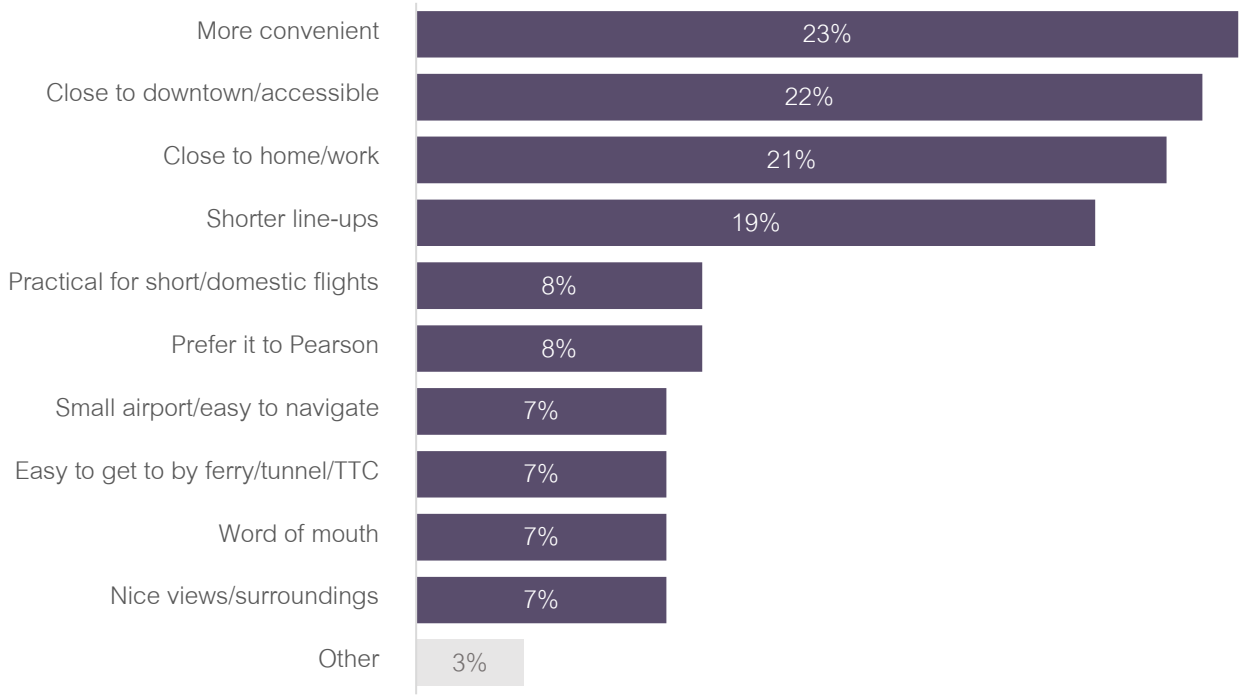




PortsToronto | **Reason for Favourable Impression**

Convenience, proximity to downtown, and proximity to work and home are among the top reasons **Spadina-Fort York respondents** have a favourable opinion of the Billy Bishop Airport. Proximity and convenience are top reasons for favourability shared with the previous survey in 2018.

3a. What is the main reason you have a favourable impression of Billy Bishop Airport? Subsample: Spadina-Fort York respondents with favourable opinion of BBTCA (N=71)

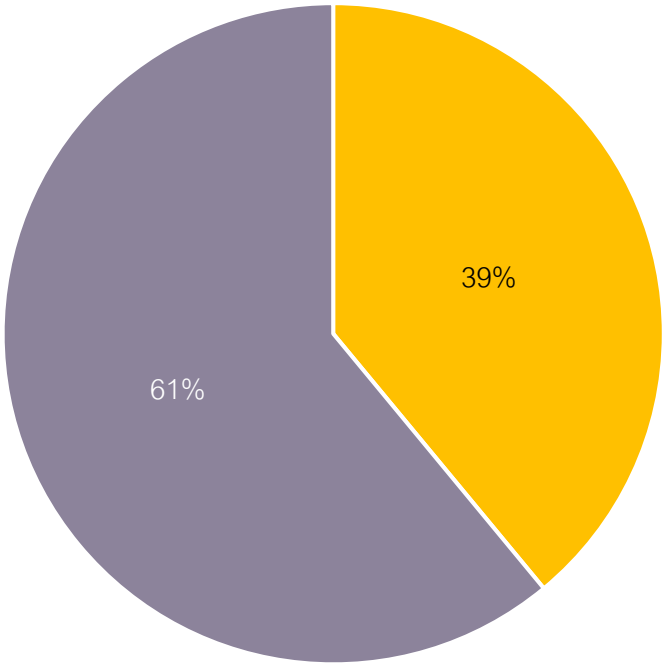


ONLY RESPONSES WITH 5% OR MORE ARE SHOWN.

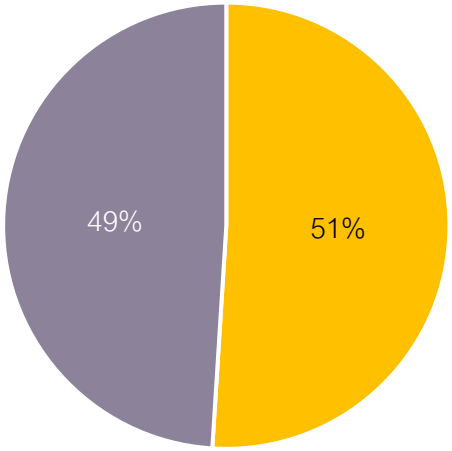
PortsToronto | **History with BBTCA**

Two in five Torontonians say they have flown from the Billy Bishop Airport in the past. Those who have previously flown from the BBTCA are more likely to include residents of Old Toronto, York/East York, and the Waterfront regions. Additionally, those who fall within the age group of 35-49, those with a child under age 18 at home, and the 2SLGBTQ+ community are subgroups more likely to have a history with the BBTCA.

Q4. Have you flown from Billy Bishop Airport before? (N=1,225)



Spadina-Fort York (N=96)

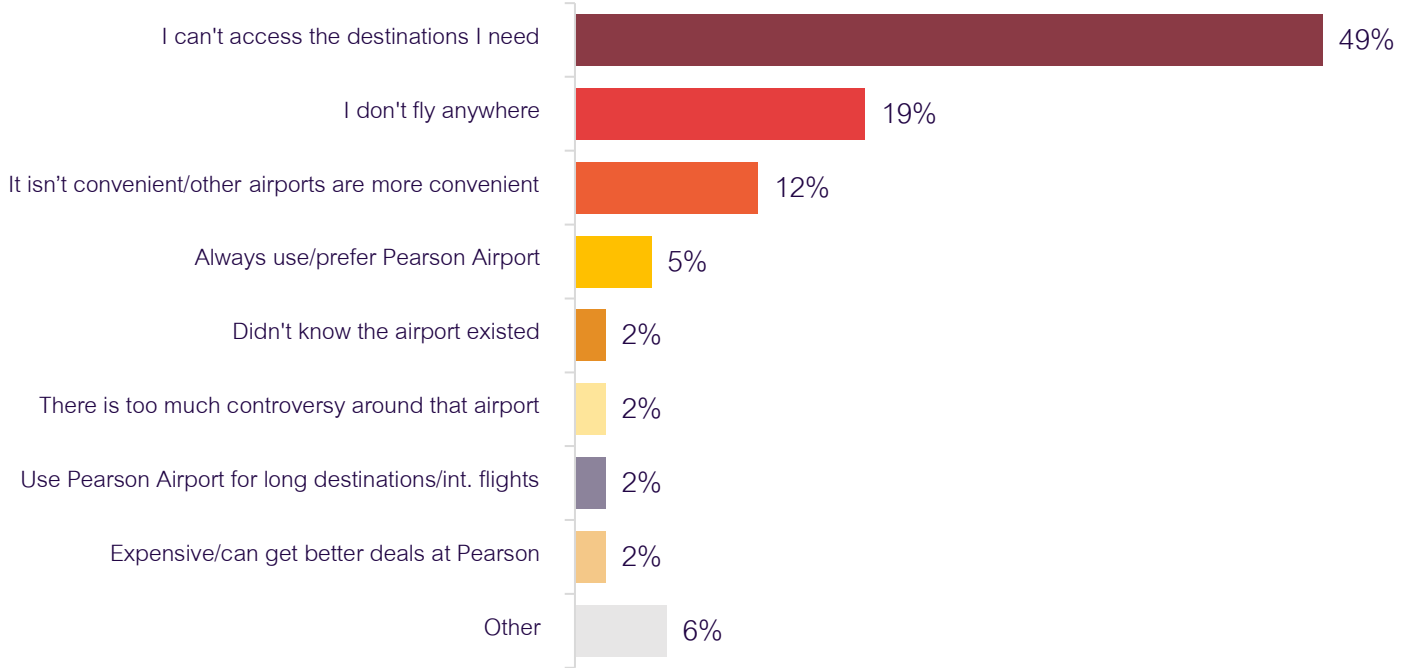


Yes No

PortsToronto | **Reasons for Not Using BBTCA**

One half of **Spadina-Fort York respondents** say an inability to access certain destinations is the top reason they have not yet flown from the Billy Bishop Airport. The top three reasons for not using the BBTCA have remained unchanged since 2016.

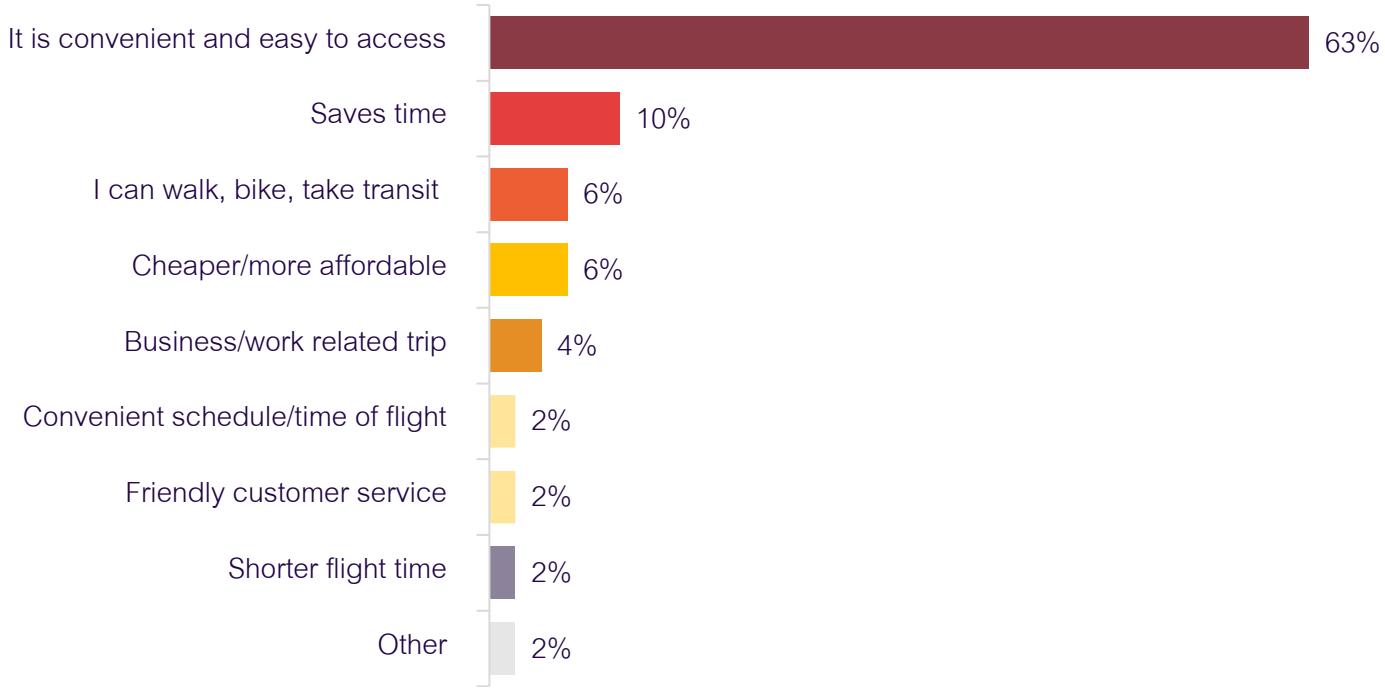
Q5. What is the main reason you have not used that airport? Subsample: Spadina-Fort York respondents who have not flown with BBTCA (N=47)



PortsToronto | **Reasons for Using BBTCA**

Three in five **Spadina-Fort York respondents** say the main reason they choose BBTCA is due to its convenience. Choosing the BBTCA primarily for its convenience has been maintained by Toronto residents since the 2016 survey.

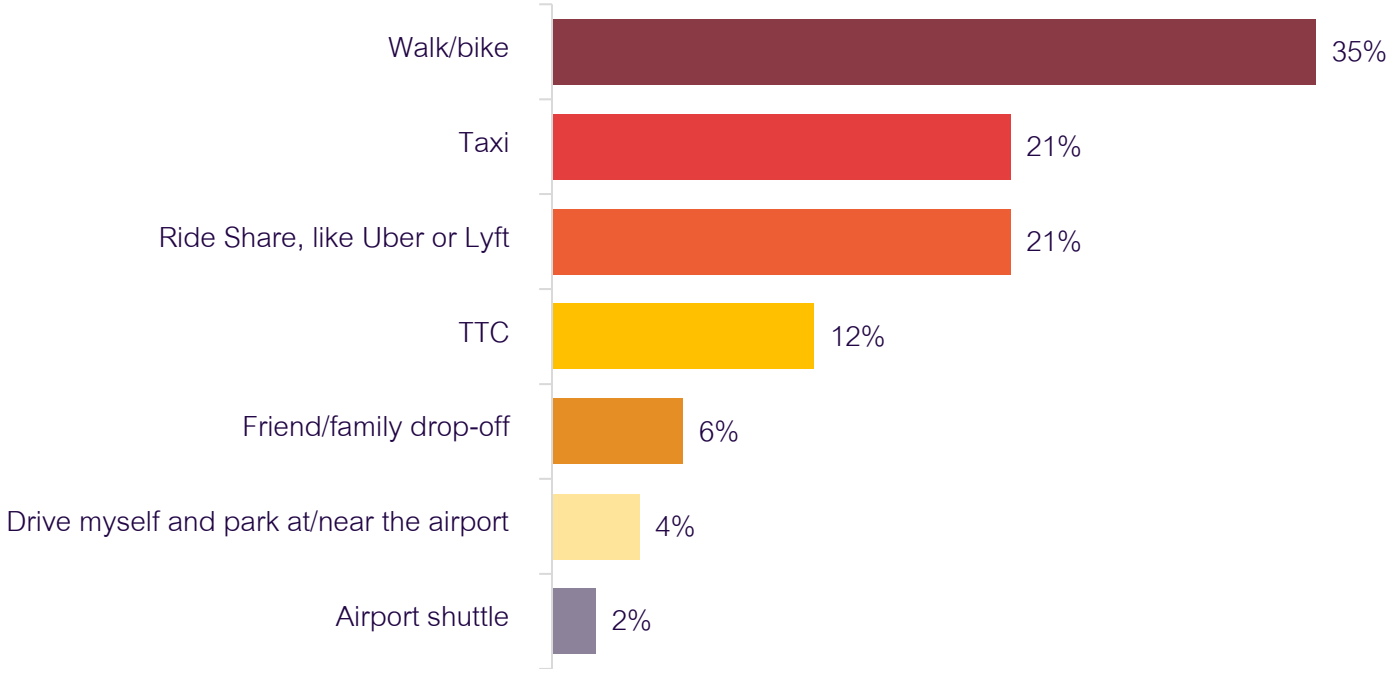
Q6. What is the main reason you choose this airport? Subsample: Spadina-Fort York respondents who have flown with BBTCA (N=49)



PortsToronto | **Methods of Getting to BBTCA**

One in three **Spadina-Fort York respondents** typically get to the Billy Bishop Airport by walking or biking, in line with the majority of these respondents who say that environmental impact is important to them.

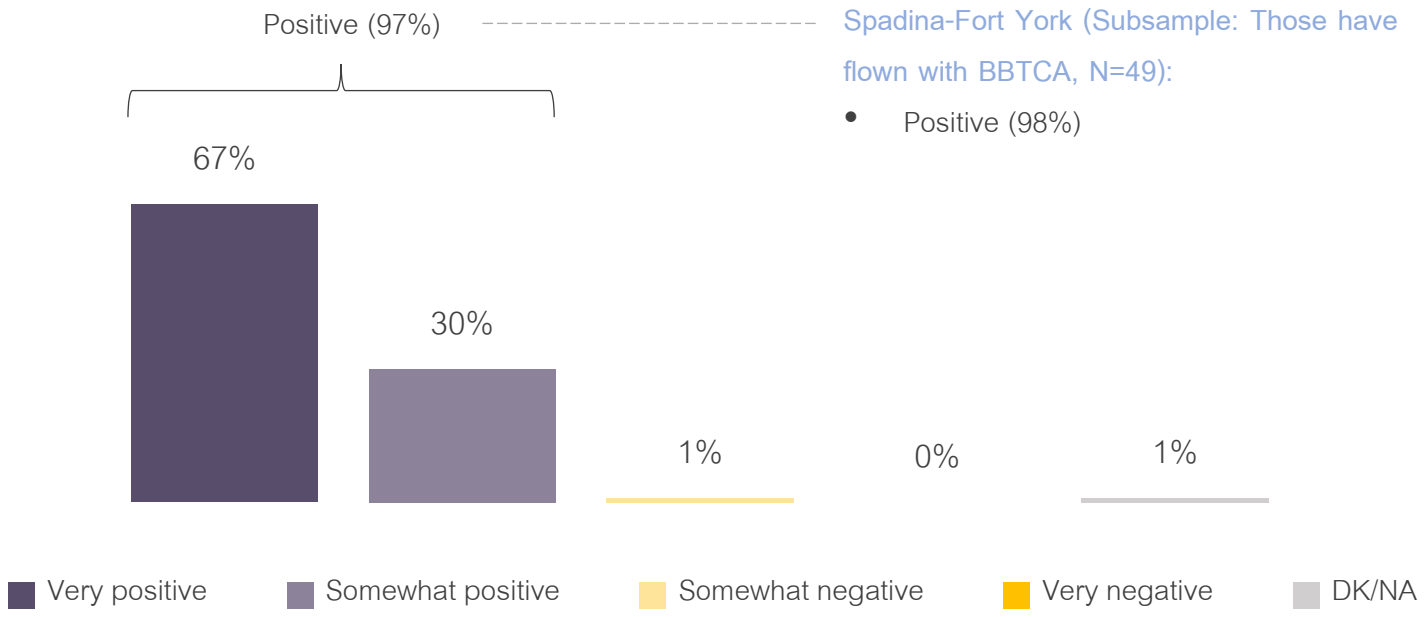
Q7. How do you typically get to Billy Bishop Airport? Subsample: Spadina-Fort York respondents who have flown with BBTCA (N=49)



PortsToronto | **Rating Experience with Airport**

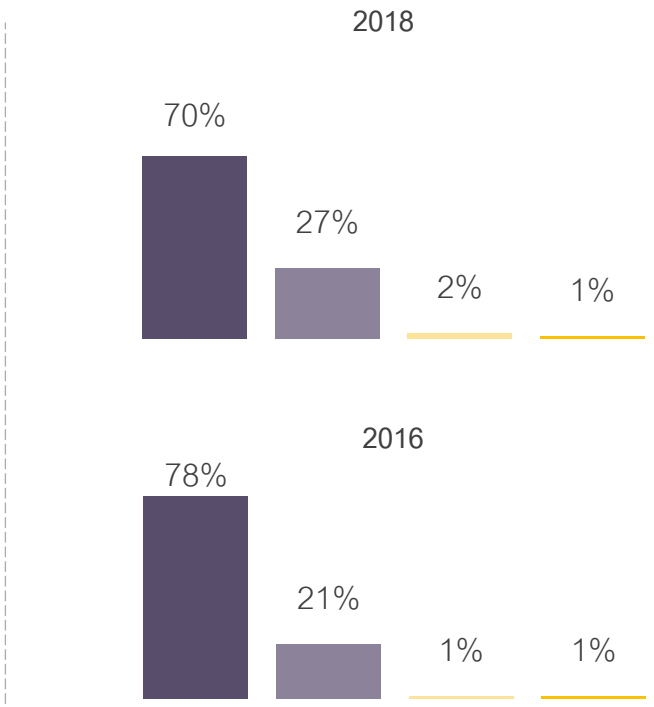
A strong majority of those who have flown with the BBTCA report positive experiences (97%), with two in three rating their experiences as "very positive." Residents who report positive experiences with the Billy Bishop Airport are more likely to include those from Scarborough, and those who say environmental impact is important.

Q8. And how would you rate your overall experience using Billy Bishop Airport? Is it… Subsample: Those who have flown with Billy Bishop Toronto City Airport. (N=504)



Spadina-Fort York (Subsample: Those have flown with BBTCA, N=49):

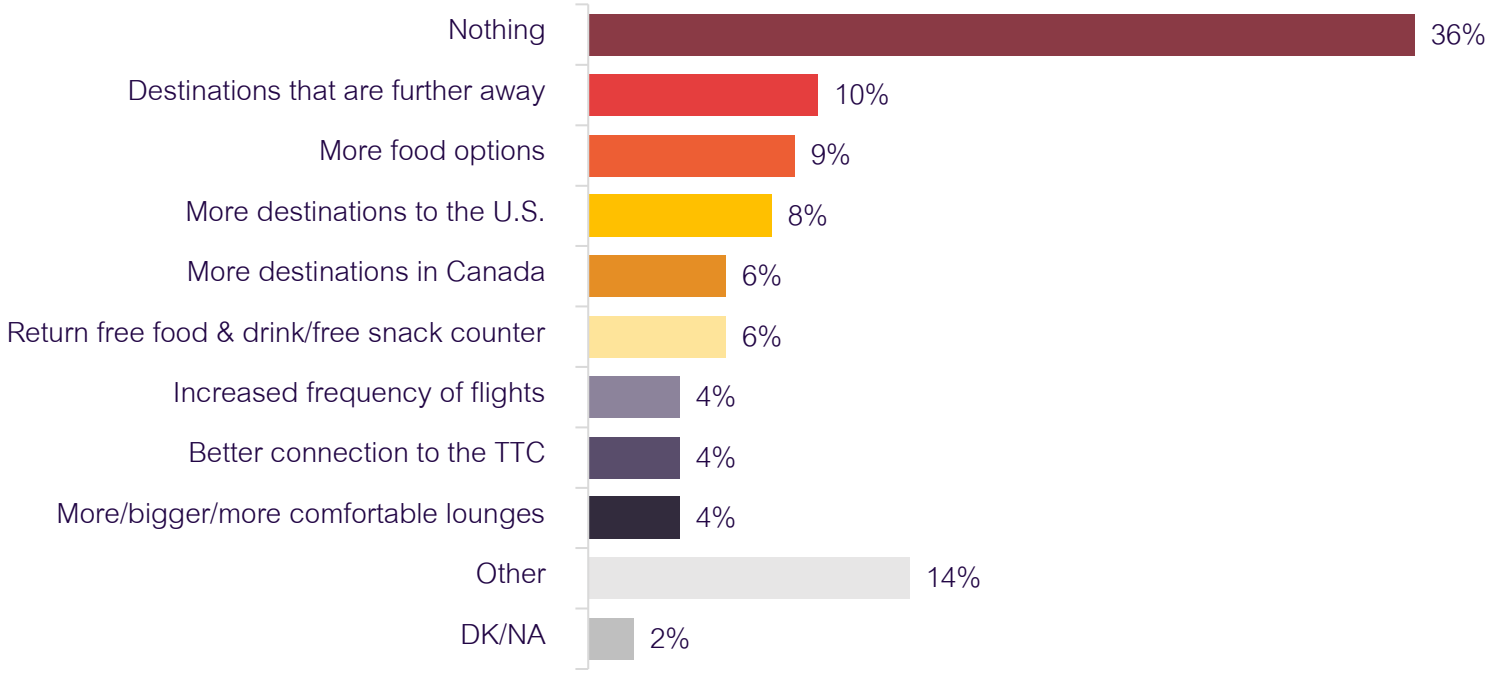
- Positive (98%)



PortsToronto | **Suggestions for Improvement**

Over one in three **Spadina-Fort York respondents** say "nothing" would make the airport better. Despite this, one in ten suggest adding destinations that are further away; adding more destinations in the U.S.; and more food options.

Q9. What would make the airport better? Subsample: Spadina-Fort York respondents who have flown with BBTCA (N=49)

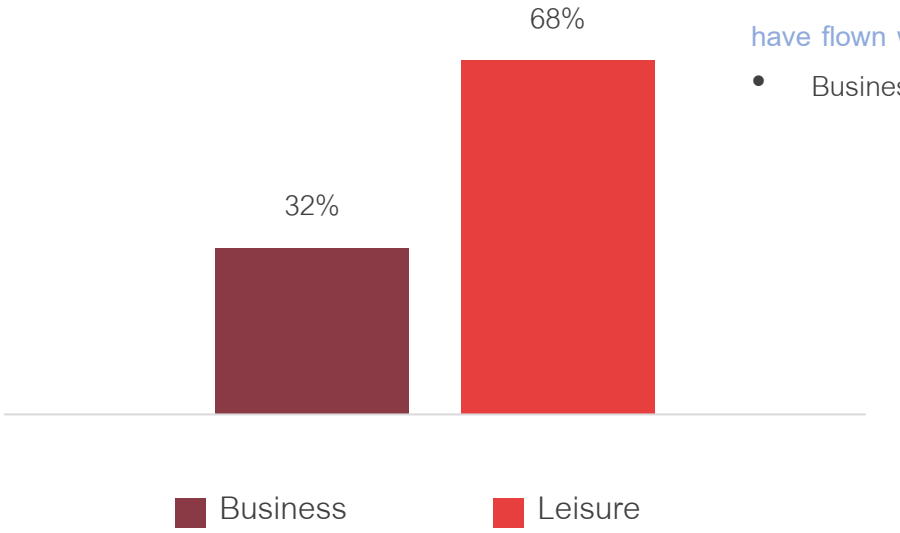


PortsToronto | **Business vs. Leisure Travel**

Toronto residents who have flown with the BBTCA say three in ten of their trips are for business, and seven in ten of their trips are for leisure. These results are on par with both the 2018 and 2016 surveys.

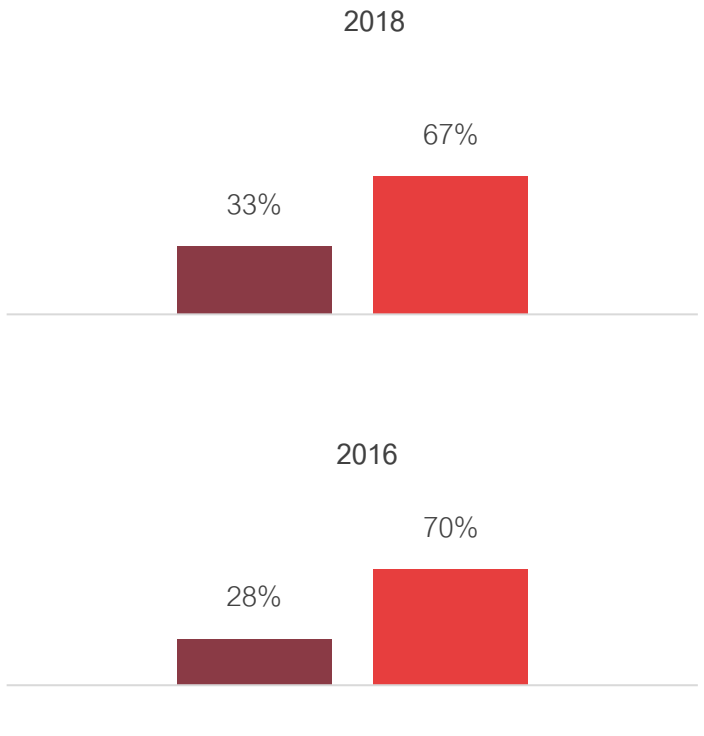
Q10.-Q11. What percentage of your trips out of Billy Bishop Airport would you say are for business and what percentage would you say are for pleasure or personal use?

Subsample: Those who have flown with Billy Bishop Toronto City Airport. (N=504)



Spadina-Fort York (Subsample: Those have flown with BBTCA, N=49):

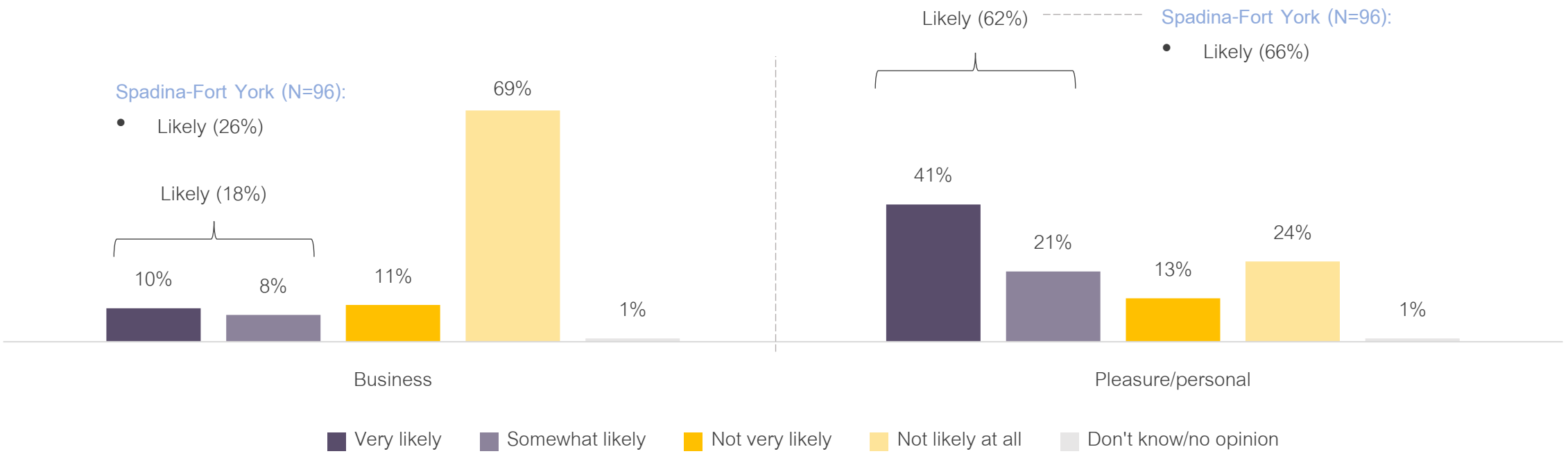
- Business (33%) / Leisure (67%)



PortsToronto | **Likely Reason for Future Travel**

When asked about post-pandemic travel, Toronto residents say they are more likely to book air travel for leisure (62%) rather than for business (18%). These results are consistent with widespread preference for leisure travel above business travel out of the Billy Bishop Airport prior to the onset of the pandemic.

Q12. As Canadians emerge from the impacts of the pandemic and consider activities like travel again, how likely are you personally to book air travel for the following reasons within the next six months: (N=1,225)

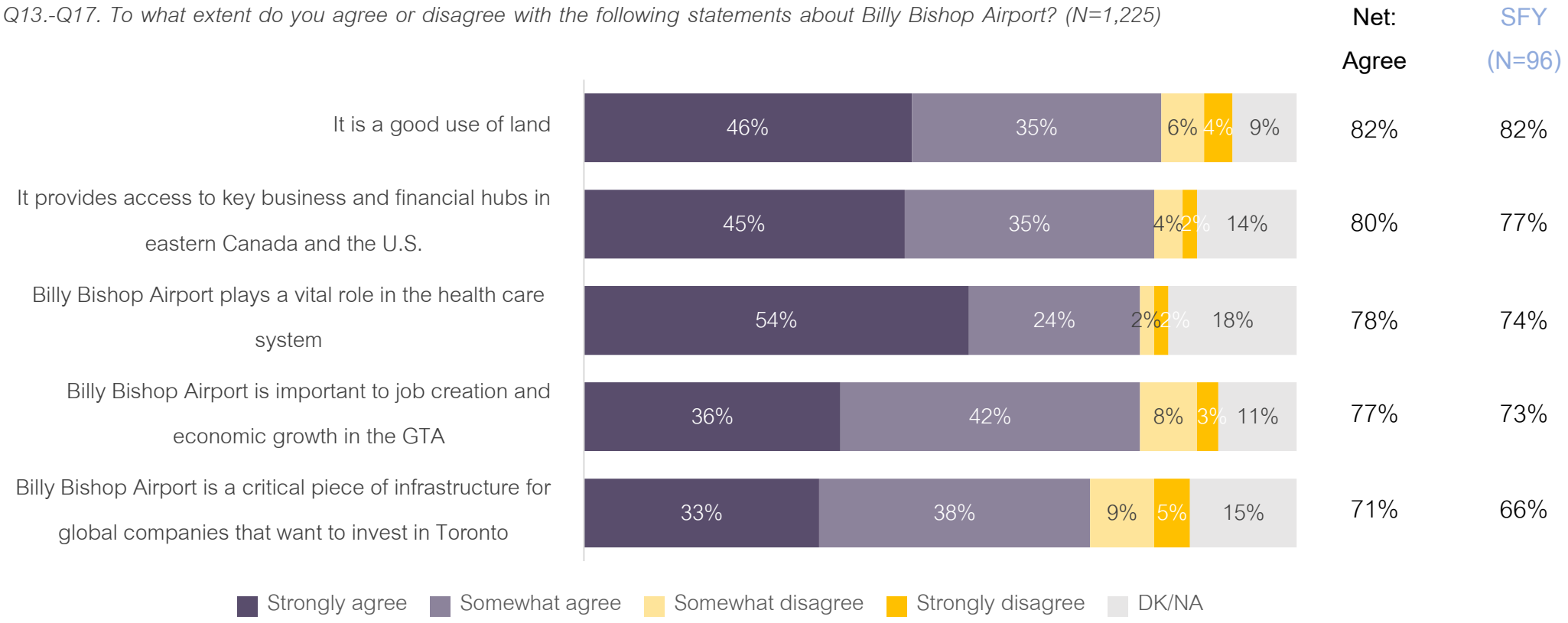


OPINIONS REGARDING A DOWNTOWN AIRPORT

PortsToronto | **Views Regarding BBTCA's Impact**

Most Toronto residents agree that the BBTCA is a good use of land, and that the airport plays a central role in business/the economy, health care, and job creation for the city. Agreement with statements regarding BBTCA's impact show little difference from the previous wave of the survey.

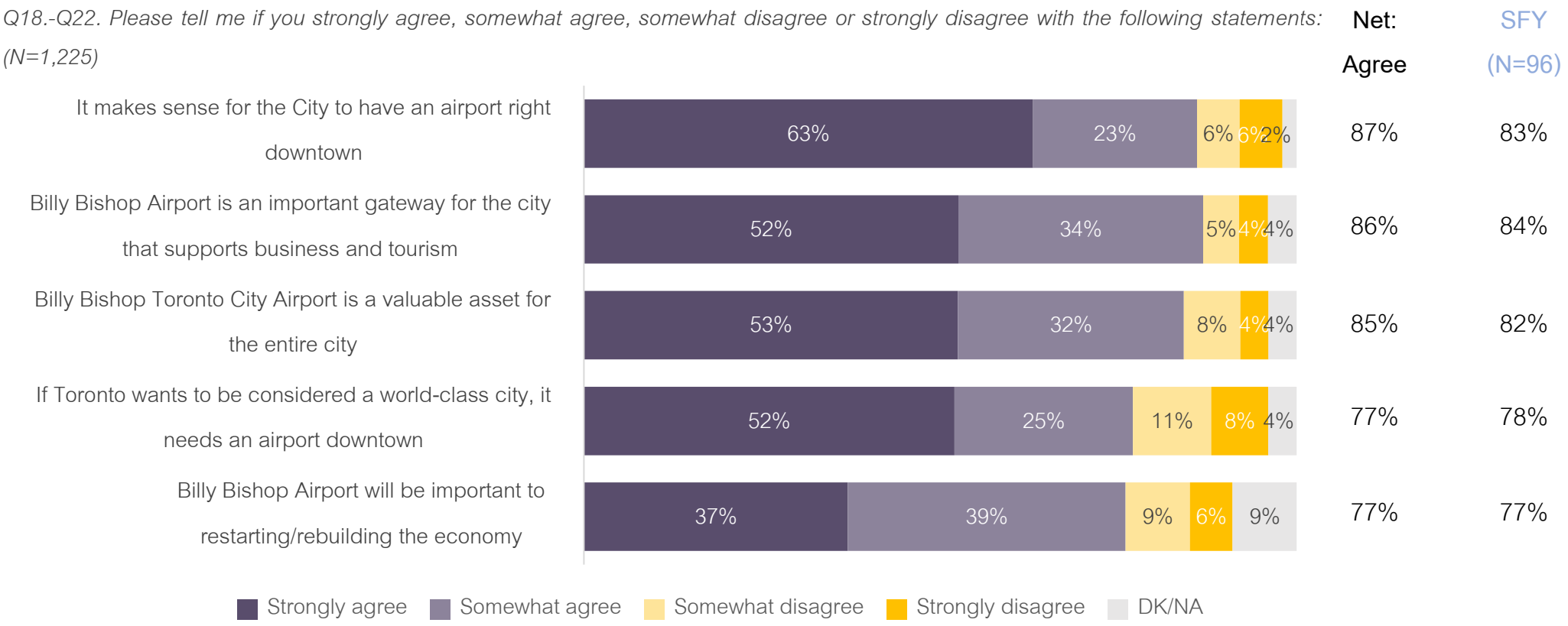
Q13.-Q17. To what extent do you agree or disagree with the following statements about Billy Bishop Airport? (N=1,225)



PortsToronto | **Statements about BBTCA**

A strong majority of Toronto residents agree with statements about the BBTCA that say the airport location "makes sense," and that it is an asset to the city regarding tourism, business/the economy, and international perception. Agreement with these statements has remained consistent with 2018 survey results.

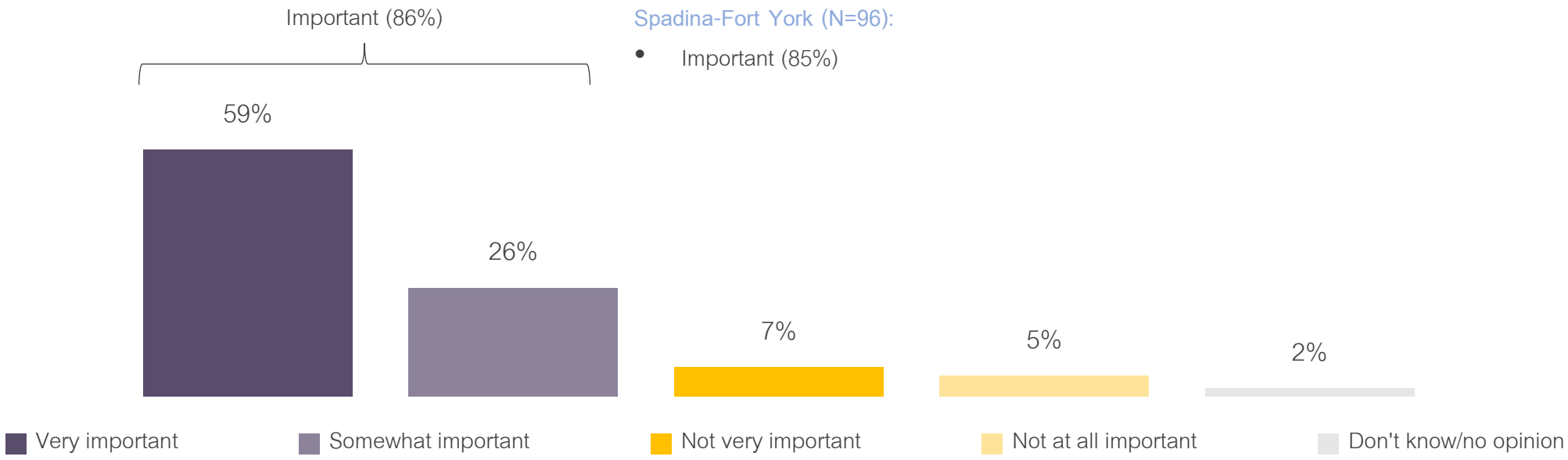
Q18.-Q22. Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements: (N=1,225)



PortsToronto | **BBTCA's Environmental Impact**

Over eight in ten Toronto residents (86%) articulate it is important to them that measures are taken by the Billy Bishop Airport to reduce environmental impact. Those who say it is "very important" are more likely to include Old Toronto (64%) and Waterfront residents (63%), women (67%), as well as those age 50-64 (64%).

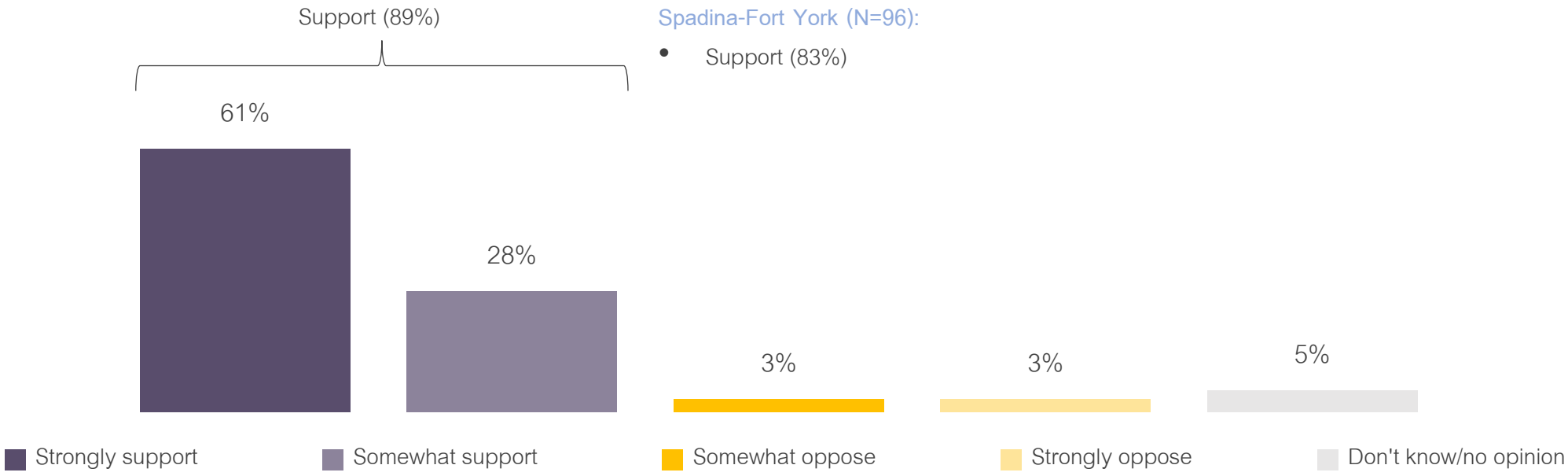
Q23. As a downtown airport, Billy Bishop Airport is committed to become cleaner, greener and quieter and operating in an environmentally sustainable matter… How important is it for you that measures like these are being taken to reduce the airport's environmental impact? (N=1,225)



PortsToronto | **Support of Environmentally-Friendly Aircraft**

There is strong support among Toronto residents (89%) for the introduction of new aircrafts that are quieter and better for the environment at the Billy Bishop Airport. Those who are most likely to communicate they "strongly support" these new aircraft include Old Toronto residents (69%), those age 35-49 (67%), in addition to those familiar with BBTCA (65%) who have had positive experiences with the airport (67%).

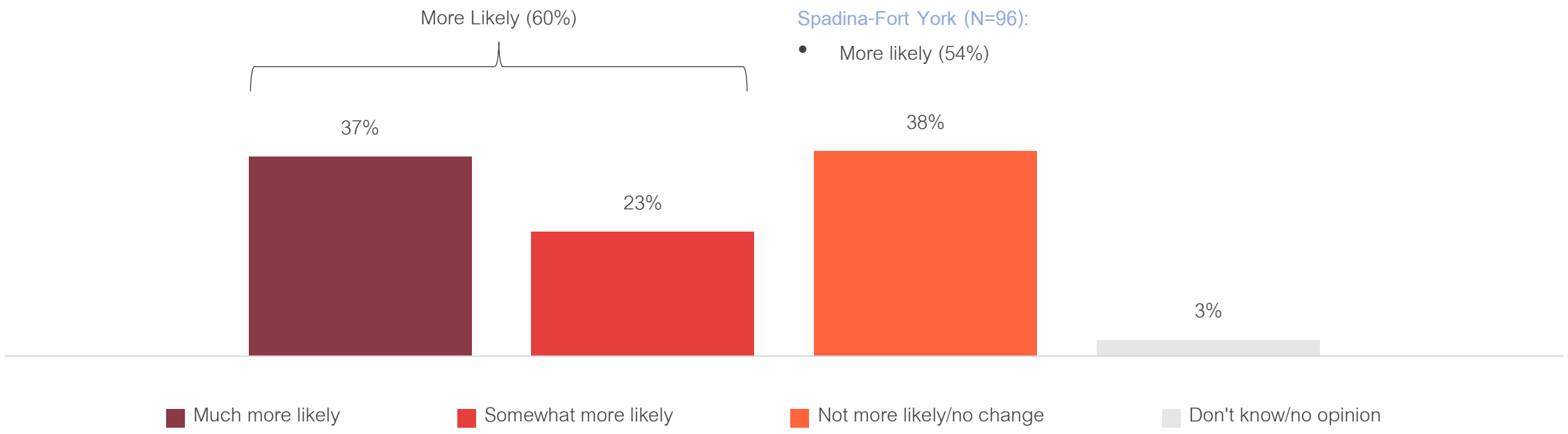
Q24. There have been advancements in technology that have resulted in new aircrafts that are quieter and better for the environment… Would you support or oppose the introduction of these types of aircraft, in addition to those currently permitted, for use at the Billy Bishop Airport? (N=1,225)



PortsToronto | **Usage of Public Transport to BBTCA**

Three in five Torontonians say they are more likely to utilize public transit to get to Billy Bishop Airport if it became more convenient, with approximately two in five saying “much more likely.”

Q25. How likely are you to use public transit to get to Billy Bishop Airport if it were more convenient than it is now? (N=1,225)

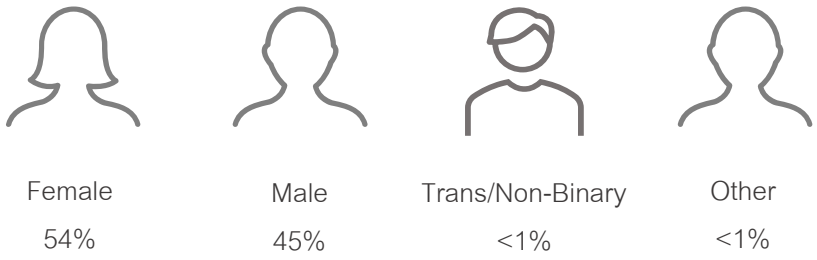


DEMOGRPAHIC PROFILE: ALL SURVEY RESPONDENTS

PortsToronto | **Demographics**

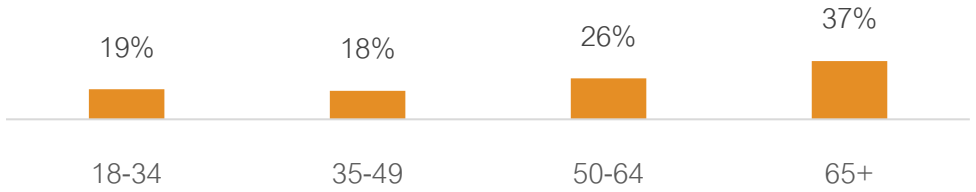
Below are demographic details of **all survey participants.**

Gender

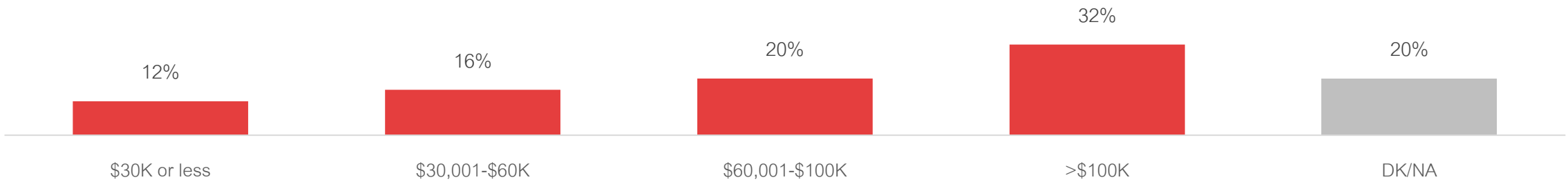


Female	Male	Trans/Non-Binary	Other
54%	45%	<1%	<1%

Age



Household Income



PortsToronto | **Demographics**

Below are demographic details of **all survey participants.**

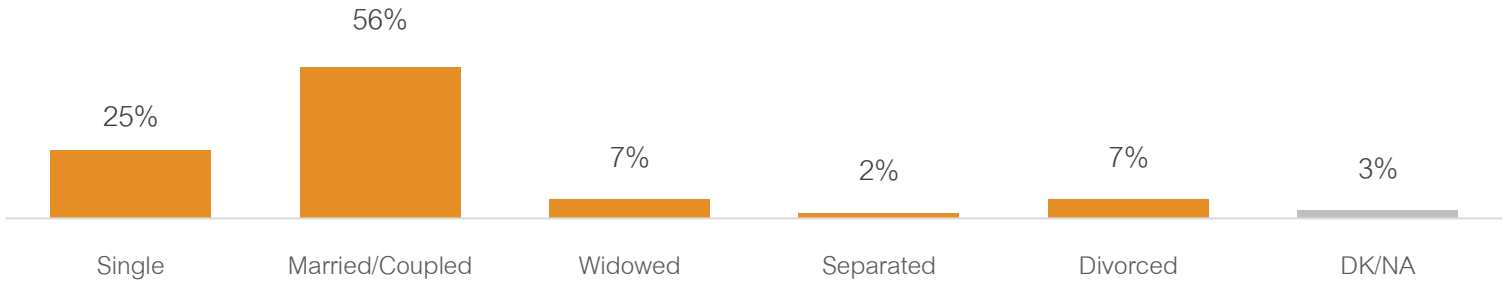
Sample Source



Landline
64%

Cell
36%

Relationship Status



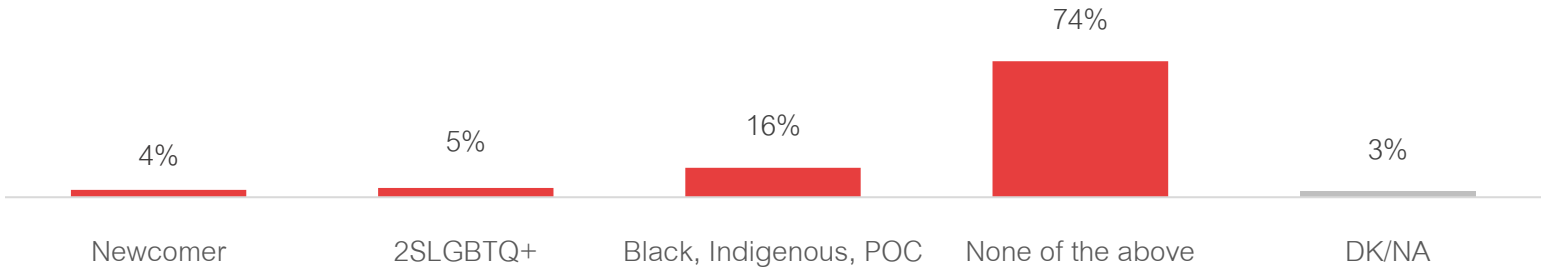
Child/Children Under 18 in Household



Yes
20%

No
77%

Minority Group



Appendix C.3 – PortsToronto 2022 Public Opinion Survey: Questionnaire

Included as supplementary material upon request from CLC members. Not presented at the CLC meeting.

PortsToronto
2022 Public Opinion Survey
Questionnaire

Hello. This is _____ from Environics Research. We are conducting a survey of attitudes and opinions of people living in your area. Please be assured that we are not selling anything and that your answers will be kept confidential.

[**ONLY STATE IF ASKED**: The survey will take approximately 12 minutes to complete].

Could we please speak to the person in the household, 18 years of age or older, who has had the most recent birthday?

PARTICIPANT SCREENING

D1. Are you, or is any member of your household a member of the news media or a public opinion polling firm?

Yes
No
Don't know

D2. In what year were you born?

_____ **(IF LATER THAN 2000, ASK:** May I speak with someone over 18 please?**)**

D3. Can you please provide me with your full postal code?

_**___ ____ ____ ____ ____ ____**

06 – Refuse **THANK AND TERMINATE**
98 – Other **THANK AND TERMINATE**
99 – DK/NA **THANK AND TERMINATE**

Impressions/Usage of Billy Bishop Airport

1. **How familiar are you with the Billy Bishop Toronto City Airport, which is located on Toronto Island near downtown? Are you …**

   01 – Very familiar
   02 – Somewhat familiar
   03 – Not very familiar
   04 – Not familiar at all
   (99 – DK/NA)

2. **How favourable is your opinion of Billy Bishop Airport? Is it**… READ

01 – Very favourable
02 – Somewhat favourable
03 – Somewhat unfavourable
04 – Very unfavourable
(99 – DK/NA)

3a. **What is the main reason you have a favourable impression of Billy Bishop Airport?**

DO NOT READ - RECODE
More convenient for travelling
Small airport/ easy to navigate
Shorter line ups/ faster customs/ less crowding
Alternative to Pearson/ reduces congestion there
Contributes to the regional economy and supports jobs
Important gateway to/from Toronto
Close to downtown/ accessible
Easy to get to by ferry/tunnel
Close to home/work
Good service at the airport
I like the carriers/airlines they offer
Practical for short flights

3b. **What is the main reason you have an unfavourable impression of Billy Bishop Airport?**
[DO NOT READ RECODE]
Noise pollution
Polluting the environment
Tourist/recreational area/should be reserved
Location/close to downtown
In the lake/wrong place
Expansion taking over/changing landscape of island
Planes always flying over houses
Traffic congestion/people driving to airport
Flights often cancelled/delayed
Have Pearson/no need for another airport
Poor Experience
Lack of public transit connection

4. **Have you flown from Billy Bishop Airport before?**

Yes
No
Don't know/can't recall

IF NO AT BBCTA IN Q4

5. **In the previous question, you indicated you have never flown out of Billy Bishop Toronto City Airport. What is the main reason you have not used that airport?**

DO NOT READ. SINGLE RESPONSE
01 Didn't know the airport existed
02 It isn't convenient/other airports are more convenient
03 I can't access the destinations I need
04 There is too much controversy around that airport
05 I don't fly anywhere
98 Other (Please Specify): _____

F YES AT BBCTA in Q4

6. **You indicated that you have used Billy Bishop Airport. What is the main reason you choose this airport?**

DO NOT READ. SINGLE RESPONSE
01 It is convenient and easy to access
02 I can walk, bike, take transit or use a free shuttle to get to the airport
03 Friendly customer service
04 Saves time
05 Don't want to commute to Pearson
06 Better for the environment because I don't have to travel as far to get there
98 Other (Please Specify): _____

IF YES AT BBCTA in Q4

7. **How do you typically get to Billy Bishop Airport?**

DO NOT READ. SINGLE RESPONSE.

01 Taxi
02 Ride Share, like Uber or Lyft
03 Airport Shuttle
04 Walk/Bike
05 TTC
06 Friend/family drop-off
07 Drive myself and park at/near the airport
98 Other (Please Specify): _____

IF YES AT BBCTA in Q4

8. **And how would you rate your overall experience using Billy Bishop Airport? Is it…**

01 - Very positive
02 - Somewhat positive
03 - Somewhat negative
04 - Very negative
(99 - DK/NA)

IF YES AT BBCTA in Q4

9. **What would make the airport better?**

DO NOT READ. MULTIPLE RESPONSE

01 More retail
02 More/better parking
03 More food options
04 More destinations in Canada
05 More destinations to the United States
06 Destinations that are further away
07 Better connection to the TTC
08 Increased frequency of flights
09 Ability to clear US customs at Billy Bishop Airport
10 Nothing
98 Other (Specify)_____
99 (DK/NA)

IF YES AT BBCTA in Q4

What percentage of your trips out of Billy Bishop Airport would you say are for business and what percentage would you say are for pleasure or personal use? (TOTALS MUST ADD UP TO 100%)

10. Business: _____ **(RECORD FROM 0-100%)**
11. Pleasure/personal: _____ **(RECORD FROM 0-100%)**

12. As Canadians emerge from the impacts of the pandemic and consider activities like travel again, how likely are you personally to book air travel for the following reasons within the next six months:

RANDOMIZE
- Business
- Pleasure/personal

Very likely
Somewhat likely
Not very likely
Not likely at all
Don't know /no opinion

Opinions Regarding a Downtown Airport

To what extent do you agree or disagree with the following statements about Billy Bishop Airport?

ROWS - RANDOMIZE

13. Billy Bishop Airport is important to job creation and economic growth in the GTA.
14. Billy Bishop Airport plays a vital role in the health care system as it allows aircraft with critically ill patients and organ transfers from all over Ontario to access Toronto's hospitals.
15. Billy Bishop Airport is a critical piece of infrastructure for global companies that want to invest in Toronto
16. It provides access to key business and financial hubs in eastern Canada and the USA
17. It is a good use of land

COLUMNS

01 - Strongly agree
02 - Somewhat agree
03 - Somewhat disagree
04 - Strongly disagree
(99 - DK/NA)

Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements:

RANDOMIZE

18. Billy Bishop Airport is an important gateway for the city that supports business and tourism
19. Billy Bishop Toronto City Airport is a valuable asset for the entire city
20. It makes sense for the City to have an airport right downtown
21. If Toronto wants to be considered a world-class city, it needs an airport downtown.
22. Billy Bishop Airport will be important to restarting/rebuilding the economy as Canada emerges from the pandemic.

COLUMNS

01 - Strongly agree
02 - Somewhat agree
03 - Somewhat disagree
04 - Strongly disagree
(99 - DK/NA)

As a downtown airport, Billy Bishop Airport is committed to become cleaner, greener and quieter and operating in an environmentally sustainable matter. Examples include converting to an electric passenger ferry, using 100% Bullfrog Power and encouraging people to walk/bike/transit to the airport.

23. How important is it for you that measures like these are being taken to reduce the airport's environmental impact?

Very important
Somewhat important
Not very important
Not at all important
Don't know/no opinion

24. There have been advancements in technology that have resulted in new aircrafts that are quieter and better for the environment in terms of pollution emissions and air quality. Would you support or oppose the introduction of these types of aircraft, in addition to those currently permitted, for use at the Billy Bishop Airport?

Strongly support
Somewhat support
Somewhat oppose
Strongly oppose
Don't know/no opinion

25. How likely are you to use public transit to get to Billy Bishop Airport if it were more convenient than it is now?

Much more likely
Somewhat more likely
No more likely/no change
Don't know/no opinion

DEMOGRAPHICS

And now, I'd like to ask you some questions about yourself and your household. Please be assured that all your responses will be kept entirely anonymous and absolutely confidential.

D1. Are you …?
READ - CODE ONE ONLY

01 - Single, never married
02 - Married or living as a couple
03 - Widowed
04 - Separated
05 – Divorced
(99 – DK/NA)

D2. Do you have children under the age of 18 living in your household?

01 - Yes
02 – No
(99 – DK/NA)

D3. Which of the following describes your gender identity?

1. Woman
2. Man
3. Gender Fluid / Gender Queer
4. Non-Binary
5. Trans
6. Two-Spirit
7. I do not identify with a gender
8. Prefer not to answer

D4. Do you identify as a member of any of these groups? **(MULTI SELECT)**

RANDOMIZE
01 - Newcomer to Canada (arrived in Canada within past ten years)
02 - 2SLGBTQ+ (e.g. Lesbian, Gay, Bisexual, Transgender, Queer, Two-Spirited, Questioning)
03 - Black, Indigenous or Person of Colour
04 - None of the above
05 - Prefer not to say

D5. For statistical purposes only, we need information about your income. Please tell me which category applies to your total household income before taxes for 2017?
READ ONLY UNTIL CORRECT CATEGORY REACHED - CODE ONE ONLY

01 – $30,000 or less
02 – $30,001 to $60,000
03 – $60,001 to $100,000
04 – over $100,000
(99 – DK/NA)

Thank you very much for your participation in the survey.

Appendix D – NAV Canada Presentation on the NAV Canada Fall 2022 Update



BBTCA CLC

Nav Canada Update for Fall of 2022

Serving a world in motion
navcanada.ca

NAV CANADA

CLC Presentation Agenda

Nav Canada

Pandemic Effects

A look at Traffic Patterns from 2019 to Today

Traffic Around BBTCA

Flight Track data and patterns of commercial operations

Projects and Changes to ANSP Structure

Pre-Pandemic and Current Initiatives

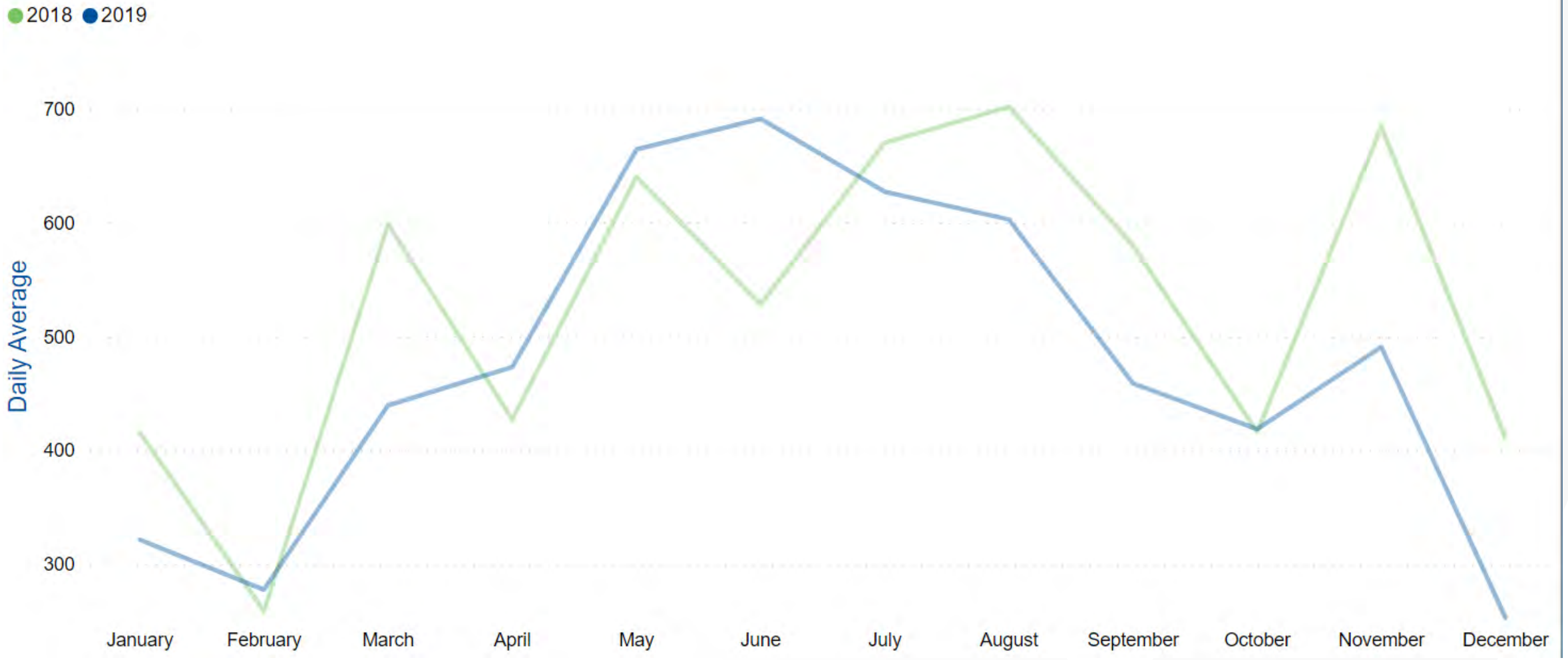
Recovery Trajectory

What we see for the near future

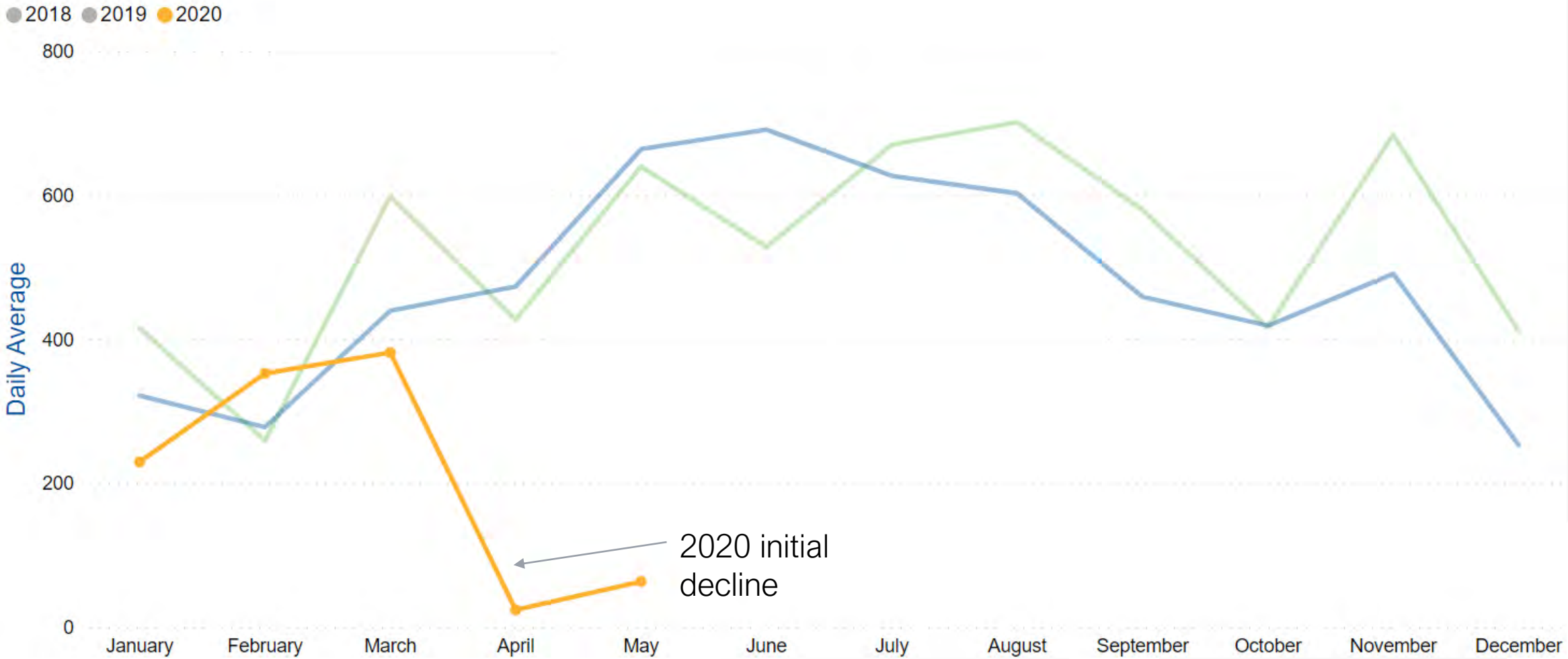
Q&A

NAV CANADA • PROPRIETARY

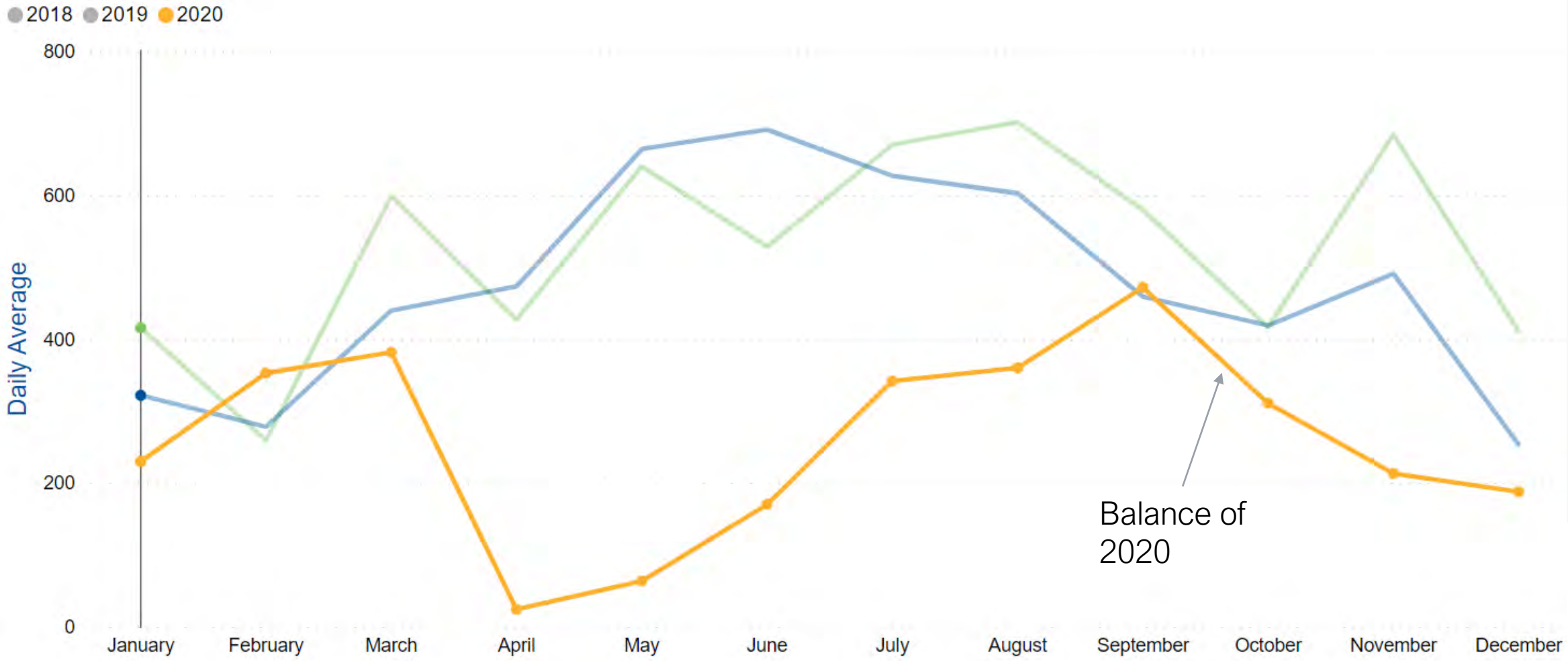
Our Frame of Reference (Daily Average of all Movements)



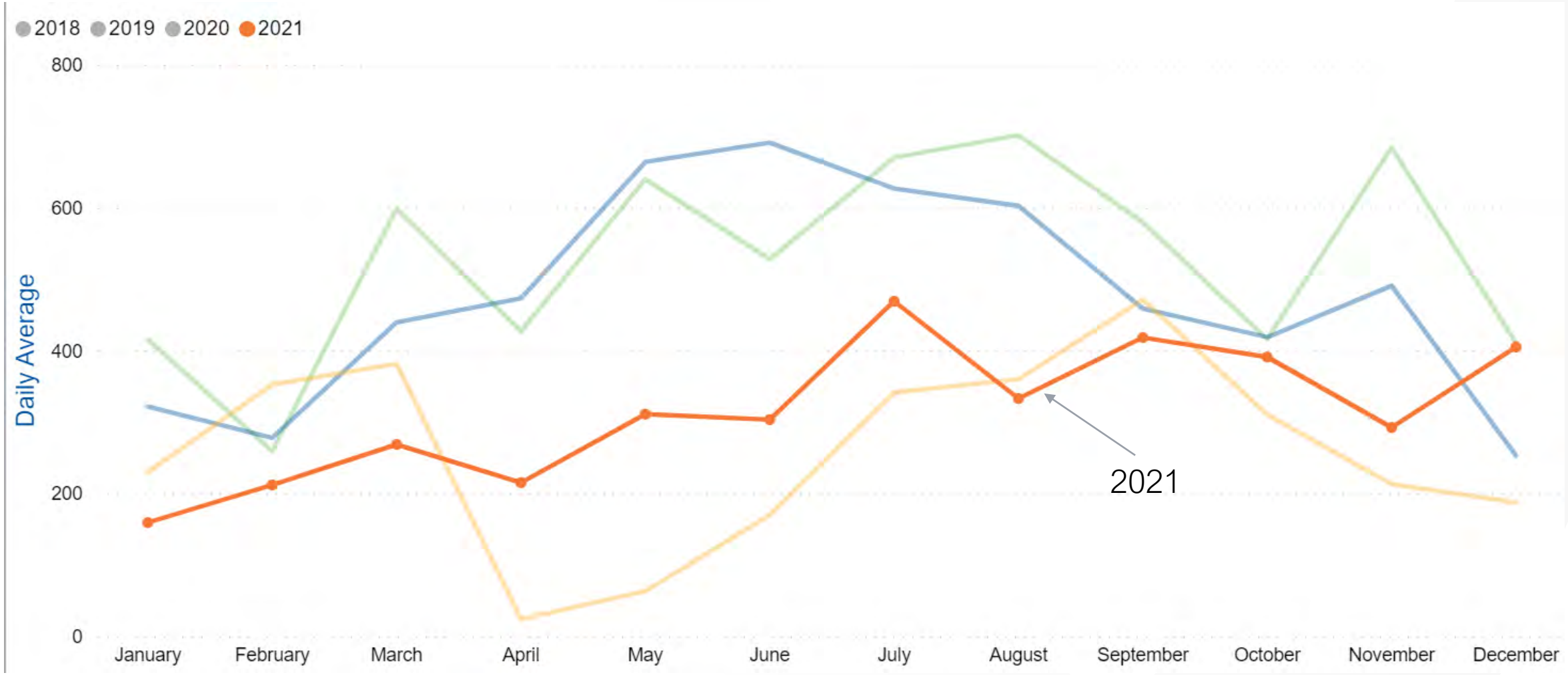
Initial Pandemic Effect (Daily Average of all Movements)



2020 as a Whole (Daily Average of all Movements)

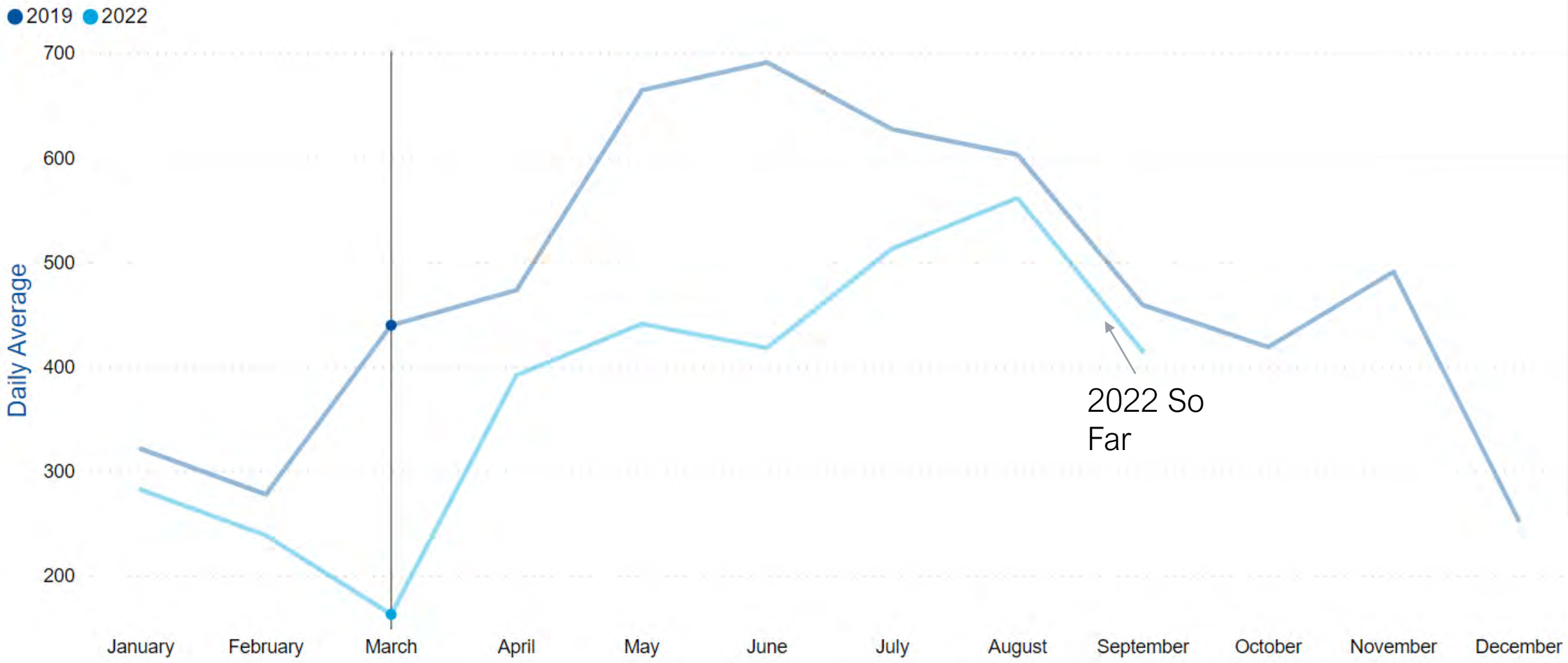


Recovery through 2021 (Daily Average of all Movements)



NAV CANADA • PROPRIETARY

Today vs 2019 (Daily Average of all Movements)

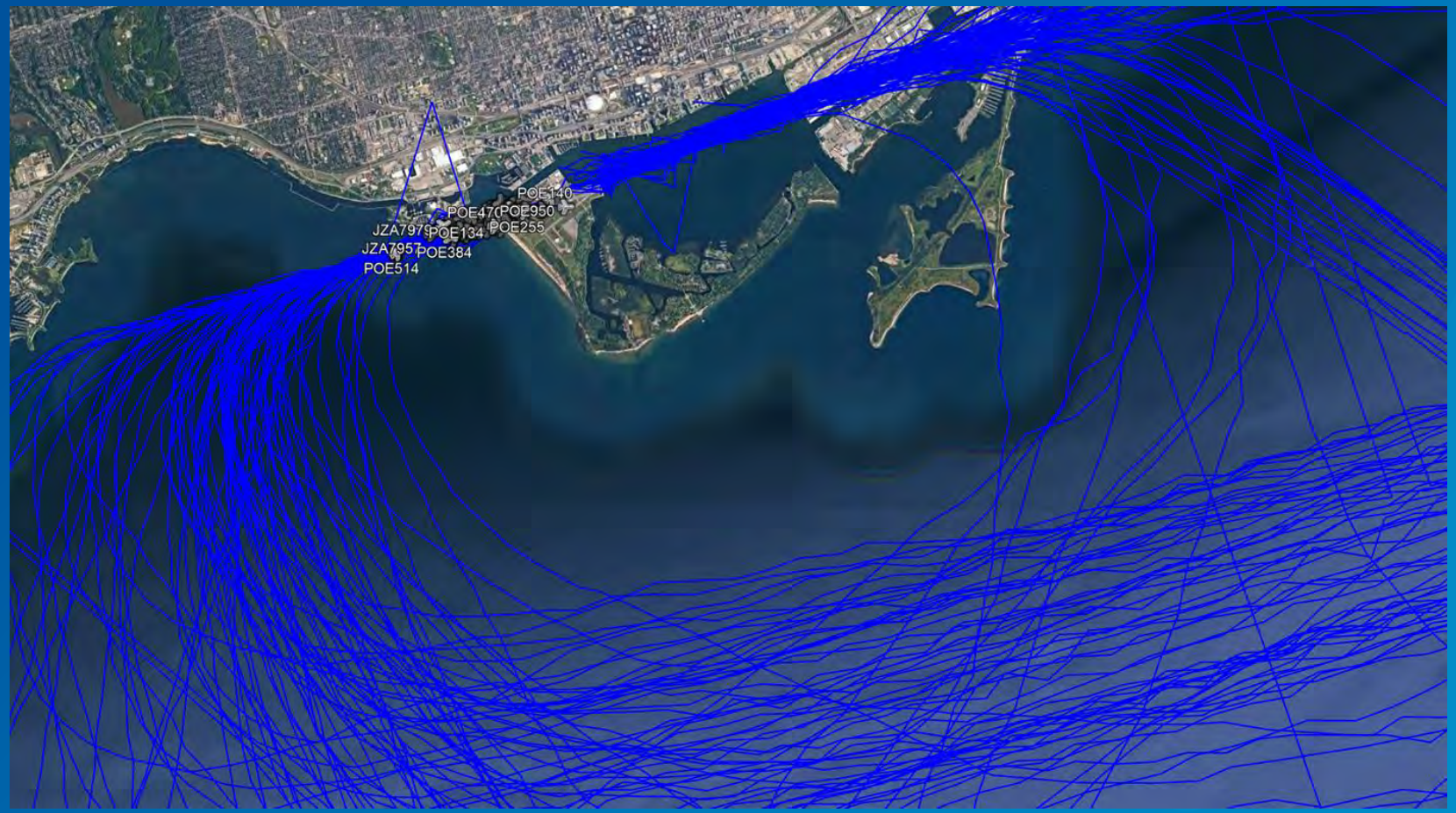




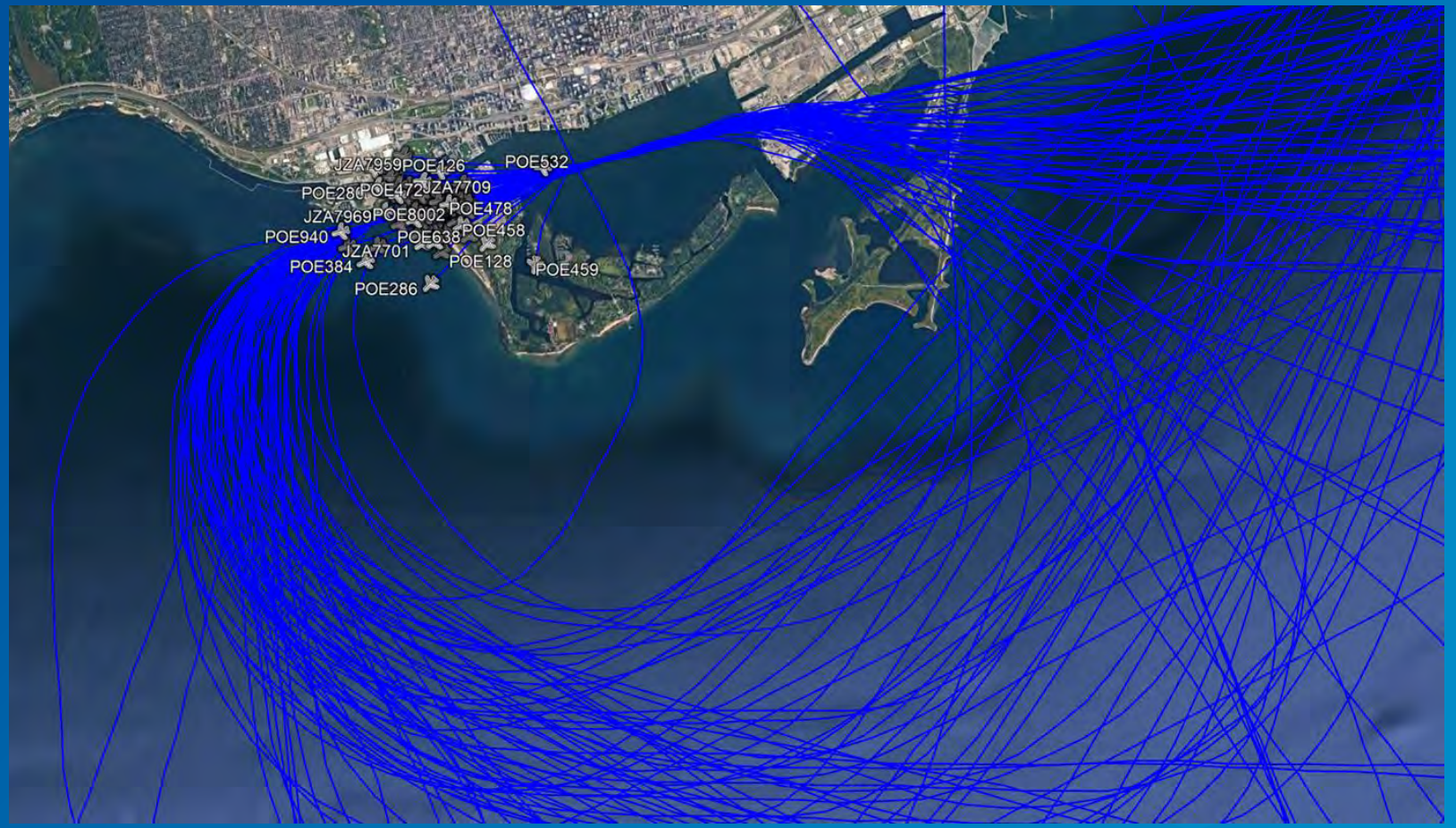
Traffic around Billy Bishop

A Look at aircraft routes in and out of the Airport

2019 DH8D Flight Track Sample



2022 DH8D Flight Track Sample





Projects

Three Priorities Coming out of the Pandemic

Pre-Pandemic Changes

Changes discussed with the CLC prior to the pandemic

-Implementation of RNP Approach to Runway 08

-Implementation of LPV approach to Runway 26

-Elimination of ILS approach to Runway 26

There have been no further changes to the ANSP structure supporting operations at Billy Bishop Toronto City Airport

NAV CANADA • PROPRIETARY



IWP

Integrated Working Position

Updating Software and improvements to legacy infrastructure

Improved commonality in operational procedures and performance

Improved human factors integration

Reduction in maintenance and support requirements

NAV CANADA ▸ PROPRIETARY

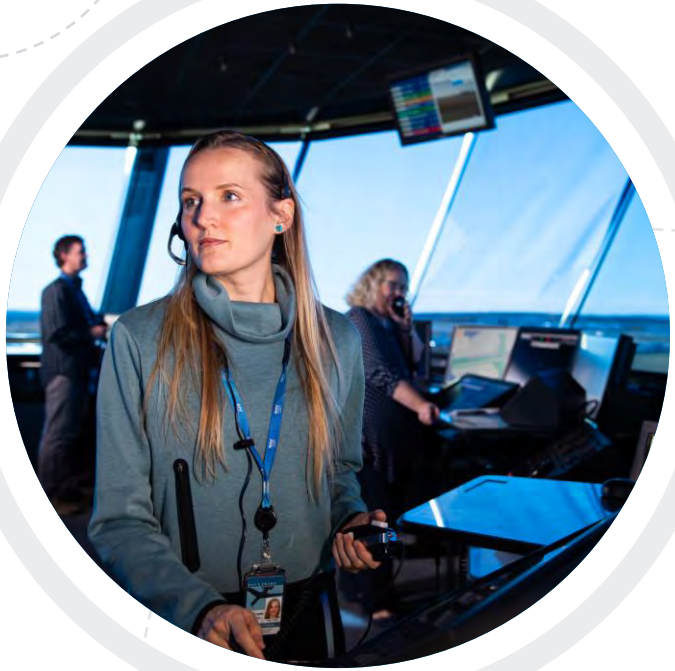


Improved Telecommunications

Urban development presents its challenges

Addition of a second Transceiver to supplement communications with aircraft

Planned Implementation in spring of 2023



Recruitment

Challenges seen throughout the industry

Staffing challenges are not unique during pandemic recovery of industry

Nav Canada is hiring to add front line operational staff

No significant changes planned for Billy Bishop Tower

The Future Trajectory

Many Industries are challenged by labour shortages.

What to expect in the coming Winter?

How has the nature of Business travel changed if at all?

Economic indicators identifying changes to local and global economies?





Thank You

Nav Canada Update for Fall of 2022

Serving a world in motion
navcanada.ca

NAV CANADA

Appendix E – LURA Consulting Presentation on the CLC Refresh Interviews

Billy Bishop Toronto City Airport Community Liaison Refresh Interviews What We Heard

September 28, 2022



Why were interviews conducted?

- Interviews were conducted as part of the Billy Bishop Toronto City Airport Community Liaison Refresh Strategy
- The refresh strategy is intended to
  - Update the TOR with community input
  - Fill long standing vacant positions
  - Invite new voices from existing representative organizations
  - Broaden stakeholder representation to align with Toronto's growing waterfront
  - Advance diversity and inclusion within the CLC

BILLY BISHOP TORONTO CITY AIRPORT

Background

- Interviews were held separately for each organization involved in the CLC and facilitated by LURA staff who have previously not been involved in the CLC or other BBTCA facilitation
- All current CLC member representatives were contacted for interviews, ten (10) separate interviews were held with nine (9) member organizations with eighteen (18) representatives participating in total

BILLY BISHOP TORONTO CITY AIRPORT

Interview Questions

- The following questions were asked:
  - What do you feel is working well on the CLC?
  - What improvements to the CLC meetings have you been thinking about?
  - Do the standing items capture the topics of interest that you would like to hear at each meeting? Do you feel any topics are missing/ should be added?
  - What inspired you to participate in the CLC?
  - Do you have any recommendations on additional stakeholders that Ports Toronto might consider adding to the CLC membership?
  - What do you see as the future of the CLC and its role?
- Additional follow up questions were asked as needed

BILLY BISHOP TORONTO CITY AIRPORT

Theme Analysis

- Interview responses were reviewed for themes, this revealed the key priorities that CLC members would like to focus on
- Themes identified through this analysis include:
  1. Maintain effective communications with stakeholders
  2. Continue building relationships with stakeholders
  3. Improving the effectiveness of meetings by adjusting structure & facilitation
  4. Creating a sense of trust/ mutual understanding
  5. Diversifying committee membership

BILLY BISHOP TORONTO CITY AIRPORT

1. Maintain effective communications with Stakeholders

- Many agree that the CLC functions well as an information sharing platform
- Effective way to communicate news, updates and information occurring both at the airport and within the community
- Some members suggested that:
  - Communication be more efficient and share information in a timely manner
  - Allocate more time to listen to people's opinions and suggestions

BILLY BISHOP TORONTO CITY AIRPORT

2. Continue building relationships with stakeholders

- Many express that the CLC helps build relationships between stakeholders
- Many identified that those who do attend the meetings genuinely care about fostering dialogue
  - Helps reduce tension between stakeholders
  - Enables stakeholders to communicate news, and discuss opportunities to address concerns
- There is a need to reestablish a culture of mutual respect
- Need to understand why some do not participate with the CLC
- Additional community building exercises would help strengthen relationships

BILLY BISHOP TORONTO CITY AIRPORT

3. Improving the effectiveness of meetings by adjusting structure & facilitation

- Facilitation needs to be enabled to keep conversation on track; some topics drag on too long
- Meeting attendees should come to the meeting prepared as issues that were previously addressed are brought up again
- Agenda can be sent earlier, and include a standing item to review status on action items
- Agenda can be reorganized to discuss community items earlier, if possible
- Suggested to have more written updates shared via email rather than discuss everything during the meeting
- Some prefer meetings be held online, other prefer in person or hybrid

BILLY BISHOP TORONTO CITY AIRPORT

4. Creating a sense of trust/ mutual understanding

- The CLC helps create understanding on roles; helping to clarify who to go to for questions
- Participants flagged that there is a lingering sense of distrust
- Some mention there is an adversarial environment which needs to be managed
- Some participants expressed a sense of frustration from lack of clarity over the committee purpose and what it aims to accomplish
- There is a lack of understanding regarding the goal of the CLC

BILLY BISHOP TORONTO CITY AIRPORT

5. Diversifying Committee Membership

- Diversifying membership is needed to broaden scope of perspective and advance constructive conversations
- Some existing members do not participate, it needs to be understood why, and take steps towards addressing it
- Suggested to have membership cycle every two years between a designee and sub designee
- Concern around lack of representation of island residents
- Need for more professional representatives like engineers and business owners
- Suggestion to structure membership around zones on the waterfront, with a representative from each zone
  - Zones can consider location but also differences like gender, age, race, etc.

BILLY BISHOP TORONTO CITY AIRPORT

5. Diversifying Committee Membership

Suggestions received included:

- Pirates Life
- HMCS York
- National Yacht Club
- Community Centres/Schools Rep.
- Resident(s) unaffiliated with neighbourhood associations
- City of Toronto Parks and Recreation
- OCAD
- Waterfront Toronto
- City Place Fort-York BIA
- Bathurst Lakeshore Shelter
- Indigenous Groups
- Air Quality Analysts
- Political representatives
- Airport users
- Destinations Toronto
- Toronto Police

BILLY BISHOP TORONTO CITY AIRPORT

Next Steps (Planned Schedule)

- October to November 2022
  - Search for new committee members
  - Draft revisions of TOR
  - Selection of new committee members
- November 2022
  - New member introductions and orientation to the CLC
  - Cross over meeting and review of the new draft TOR
- February 2023
  - New CLC representatives attend / confirm the new TOR

BILLY BISHOP TORONTO CITY AIRPORT

BILLY BISHOP TORONTO CITY AIRPORT

Thank You

