Smart Parkades

Leveraging Technology and Analytics to Enhance the Passenger Experience

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CPA ACS Toronto 2018

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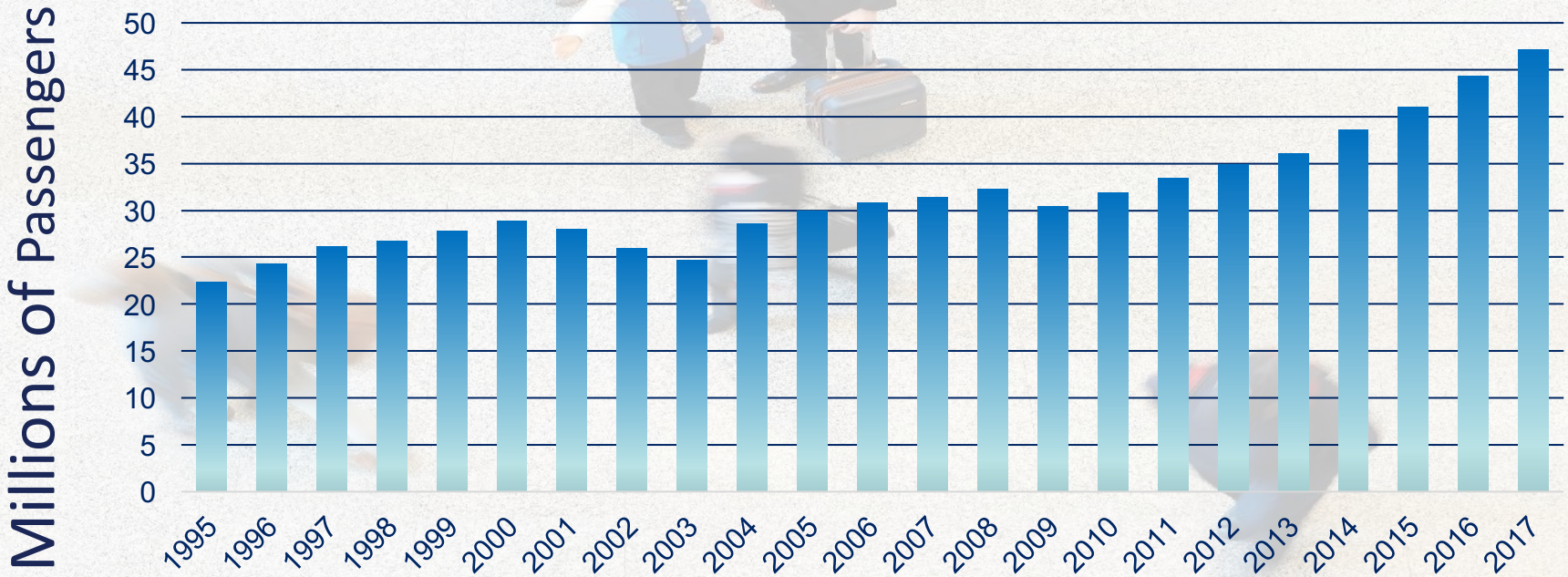
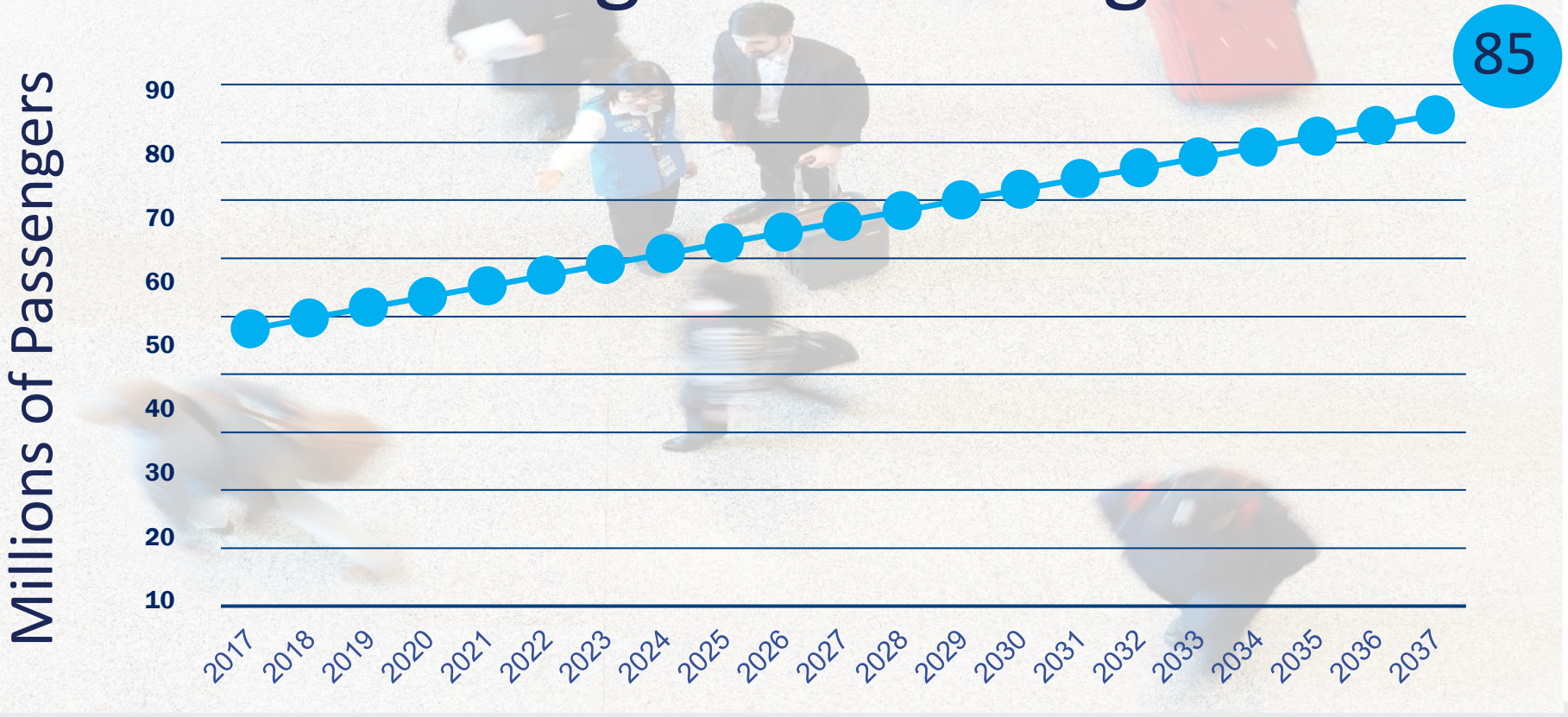
About Toronto Pearson

Two decades of growth

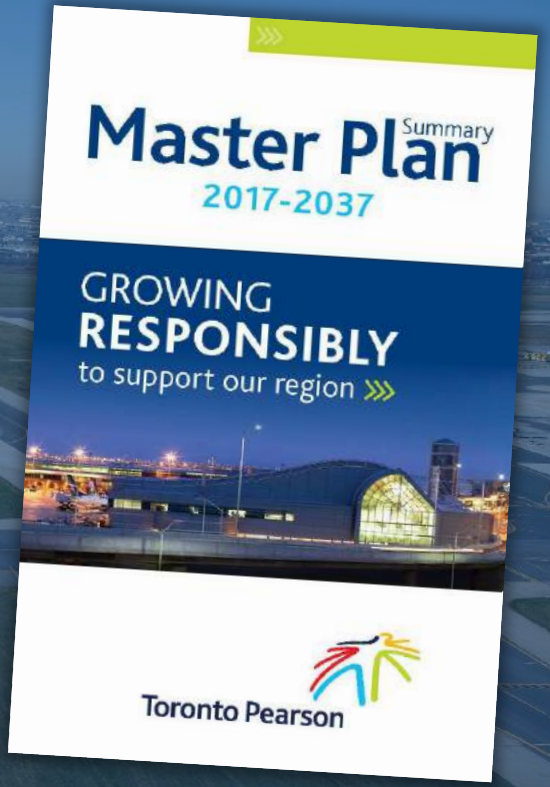
47.1M



Forecasting continued growth



2017	2037
47.1 Million Passengers (6.2%+)	85 Million Passengers
465,200 Aircraft movements (1.9%+)	632,000 Aircraft movements
110 Passengers/ Passenger Aircraft Movement	140 Passengers/ Passenger Aircraft Movement
~538,000 Tonnes of cargo	950,000 Tonnes of cargo



Connected to 70% of the global economy

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How we're reaching the world

Airlines – 63

Canadian cities served - 37

International cities served - 184

Canada's largest entry and departure point for international air service

Companies operating at Toronto Pearson

470

GTAA employees

~1,600

Airport-wide employees ~49,000

Recognition

2017's Best large airport in North America, awarded by Airports Council International

About Parking and Ground Transportation

Parking and Ground Transportation

Who are we?

1. Canada's single largest Parking operation with over 24,000 commercial parking spaces
2. 3.3M Parking exits* in 2017
3. 4.8M ground trips from airport in 2017
4. 3M public transit trips* in 2017
5. Oversight of parking and curb management
6. Make up ~50% of Non-Aeronautical Revenue at Toronto Pearson

FIRST AND LAST IMPRESSION OF PASSENGER EXPERIENCE

*Excluding employees

Parking and Ground Transportation

33.2M Airport Origin/Destination Passengers in 2017

38 %

12.5M Passengers

Curbside Pick-Up and Drop-Off (Free)

34 %

11.4M Passengers

Ground Transportation Services
(e.g. Taxi/Limo, Car Rental, Uber/Lyft, Hotel Shuttles, Greyhound, etc.)

19 %

6.3M Passengers

Onsite Airport Parking

9%

3M Passengers

Public Transit (bus and rail)

$177.2M in Revenues for Car Parking and Ground Transportation in 2017

Parking and Ground Transportation

GTAA

1 Parking

- Valet Care
- Car Care
- Express Park
- Daily Park
- Value Park Garage
- Value Park Lot
- Cell Phone Lot

Employee Parking

2 Car Rentals

- Budget Car and Truck Rental
- AVIS
- Thrifty Car Rental / Dollar Rent A Car
- Hertz
- enterprise / National / Alamo

3 Taxi + Limo

- Taxi
- Airline Limousine
- Pearson Vision Limousine
- Aircar Aeroport McIntosh Limousine

4 Pre-Arranged

- Toronto Pearson PRE-ARRANGED Services
- UBER
- UberBLACK
- lyft
- Premier
- Lux
- Lux SUV

5 Public Transit

- UP Express
- GO
- TTC
- miWAY
- Brampton Transit

6 Commercial Vehicles

- Sheraton
- Marriott
- Niagara Airbus
- Robert Airbus
- PARK'N FLY Airport Parking www.parknfly.ca

7 TNC's

- UBER
- uberX
- lyft
- Lyft

Parking and Ground Transportation

VISION

To become the best airport:
Making a difference, connecting the world.

Business Priorities:

1. Passenger Safety and Traffic Management
2. Passenger Experience & Investments in Technology
3. Providing Passengers with More Choice
4. Driving Non-Aeronautical Revenue
5. Working Together as a Team

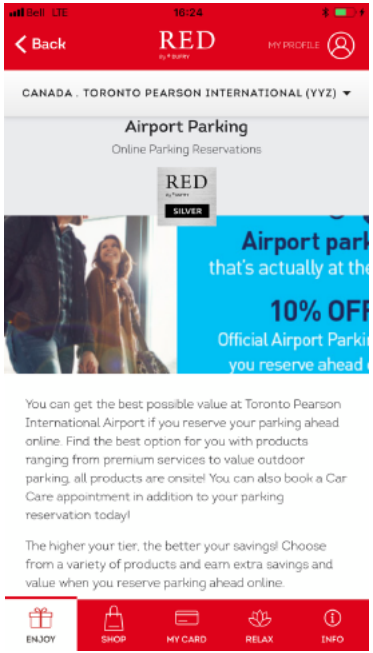
Parking Management at Toronto Pearson

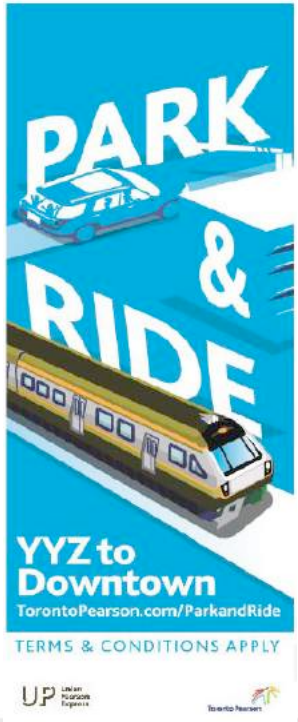
Diversified Product Roadmap

- Various Product Types for Parking

(covered vs. uncovered, premium vs. value, reserved vs. unreserved, value-add amenities)

- Providing Customers with More Choice in Ground Transportation (e.g. UberX and Lyft pilot)
- Integration/Bundle with Public Transit (Park and Ride)
- Expand Cross-Selling Opportunities (Lounge, Duty Free)

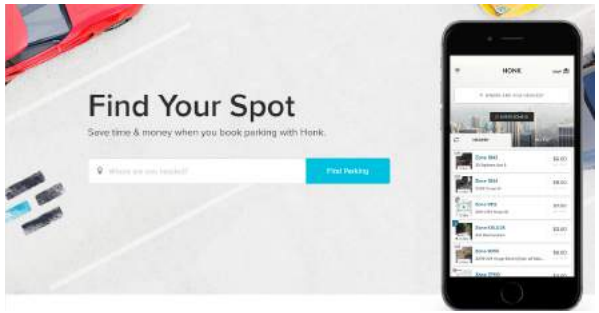




Online Reservations

Online Reservations Grow 75% Year-Over-Year; Strong Results Driven by:

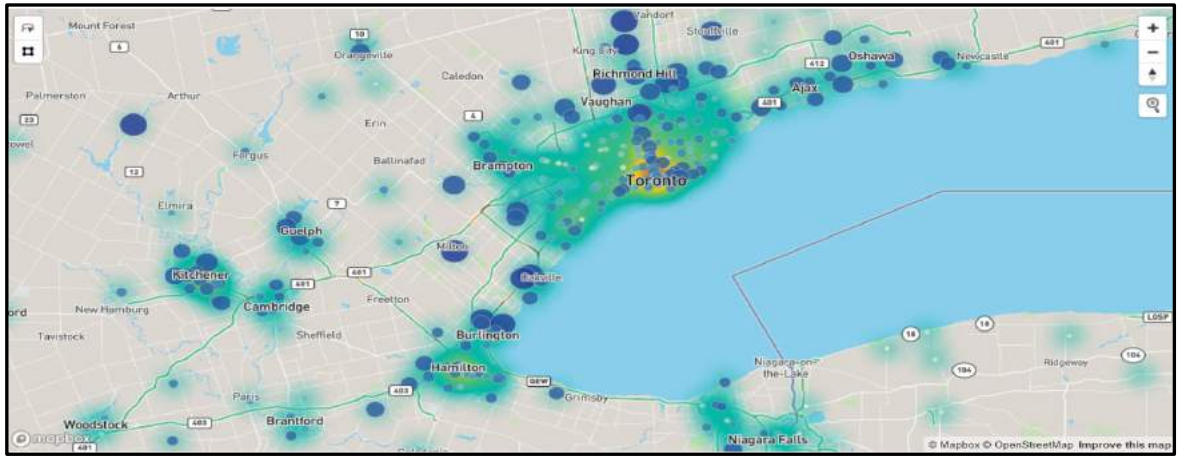
- Dynamic Pricing and Lead Time Rates
- Subscriptions and Marketing Campaigns
- Digital Search Engine Marketing
- New Mobile Responsive Website
- New Web-Based Sales Channels

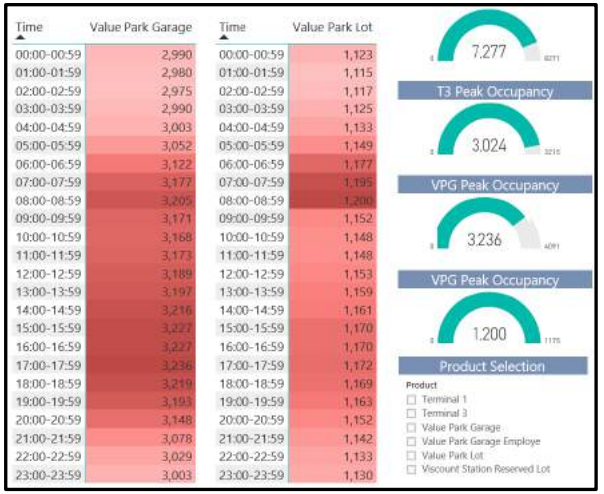


Frame 1

Frame 2

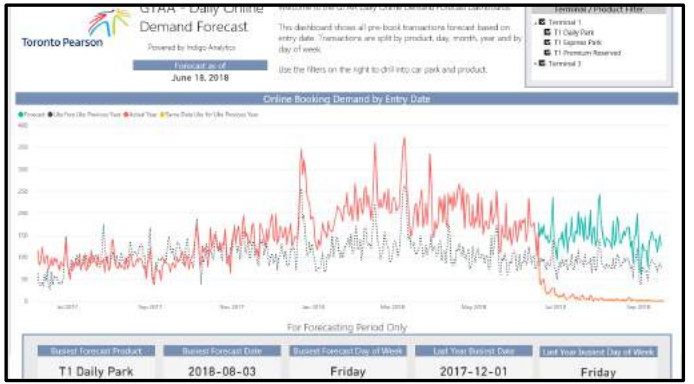
Business Intelligence (BI)





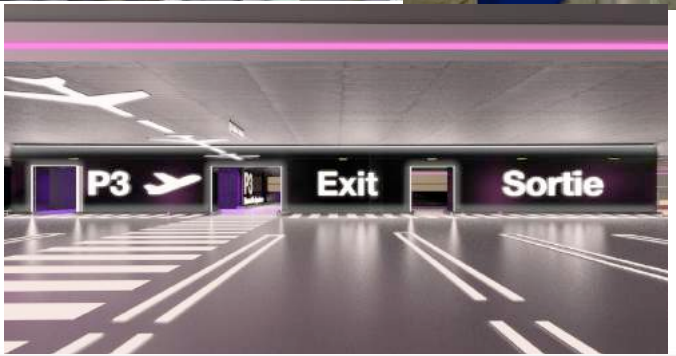
Time	Value Park Garage
00:00-00:59	2,990
01:00-01:59	2,980
02:00-02:59	2,975
03:00-03:59	2,990
04:00-04:59	3,003
05:00-05:59	3,052
06:00-06:59	3,122
07:00-07:59	3,177
08:00-08:59	3,205
09:00-09:59	3,171
10:00-10:59	3,168
11:00-11:59	3,173
12:00-12:59	3,189
13:00-13:59	3,197
14:00-14:59	3,216
15:00-15:59	3,227
16:00-16:59	3,227
17:00-17:59	3,236
18:00-18:59	3,219
19:00-19:59	3,193
20:00-20:59	3,148
21:00-21:59	3,078
22:00-22:59	3,029
23:00-23:59	3,003

Time	Value Park Lot
00:00-00:59	1,123
01:00-01:59	1,115
02:00-02:59	1,117
03:00-03:59	1,125
04:00-04:59	1,133
05:00-05:59	1,149
06:00-06:59	1,177
07:00-07:59	1,195
08:00-08:59	1,200
09:00-09:59	1,152
10:00-10:59	1,148
11:00-11:59	1,148
12:00-12:59	1,153
13:00-13:59	1,159
14:00-14:59	1,161
15:00-15:59	1,170
16:00-16:59	1,170
17:00-17:59	1,172
18:00-18:59	1,169
19:00-19:59	1,163
20:00-20:59	1,152
21:00-21:59	1,142
22:00-22:59	1,133
23:00-23:59	1,130



- Critical Investments in BI Tool
- Turning Raw Data into Insights in “Real-Time”
- Supports Decision-Making for Product Development and Pricing

Investments in our Facilities



Long-Term Vision: Regional Transit and Passenger Centre

UP

Toronto Pearson
Regional Transit Centre
Centre de transport en commun régional
SmartTrack
Car Share Services
Information

Regional Transit and Passenger Centre Concept Design Underway

Project Drivers:

- Keep Pace With Passenger Growth
- Increase Transit Use to Protect and Grow Catchment
- Alleviate Capacity Issues
- Support GTAA's Vision as a Global Mega-Hub
- Stimulate Economic Growth in the Airport Employment Zone and Region

47M → 85M
2017 2037

9% → 35%
2017 2037

Key considerations for design:

- Future proofing and building flexibility and modularity in design
- Variability in curbside access and parking demand

Questions?

Thank you

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