



BENCHMARK RESEARCH FINDINGS

Wonder Takes Flight | Là où tout commence

Overview

- Introduction
- Past Research
- Leger Survey Results
- Questions



INTRODUCTION

Introduction

- Communications strategy should be informed by insights.
- A study was conducted in November 2018 to learn what Canadians understand and appreciate about their airports, and to inform CAC's campaign.
- Formed the backbone of the approach for Wonder Takes Flight.

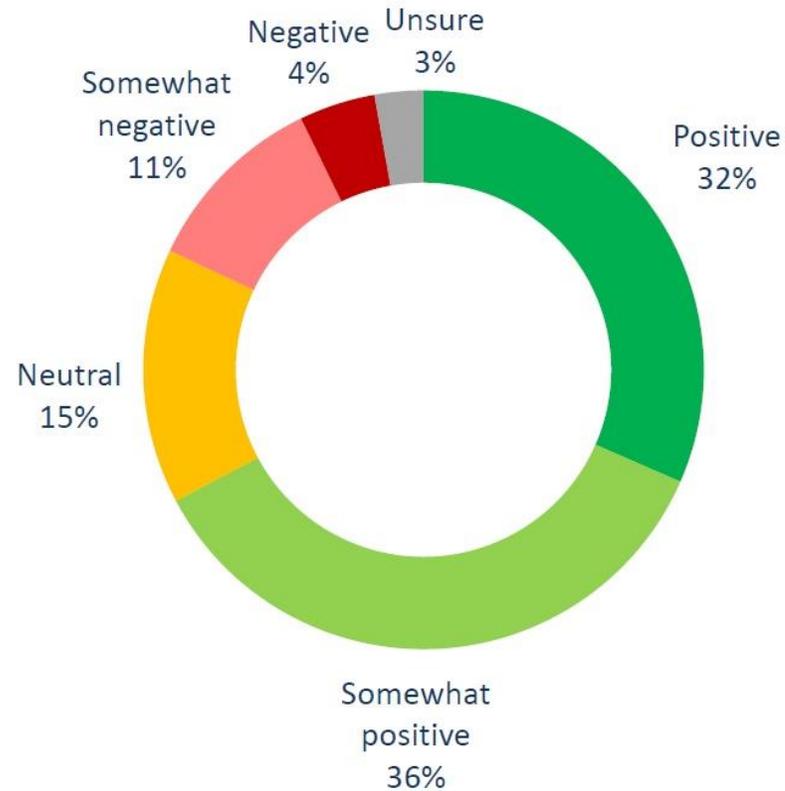




PAST RESEARCH (2017)

Past Research

OVERALL IMPRESSION OF CANADIAN AIRPORTS (NANOS, 2017)



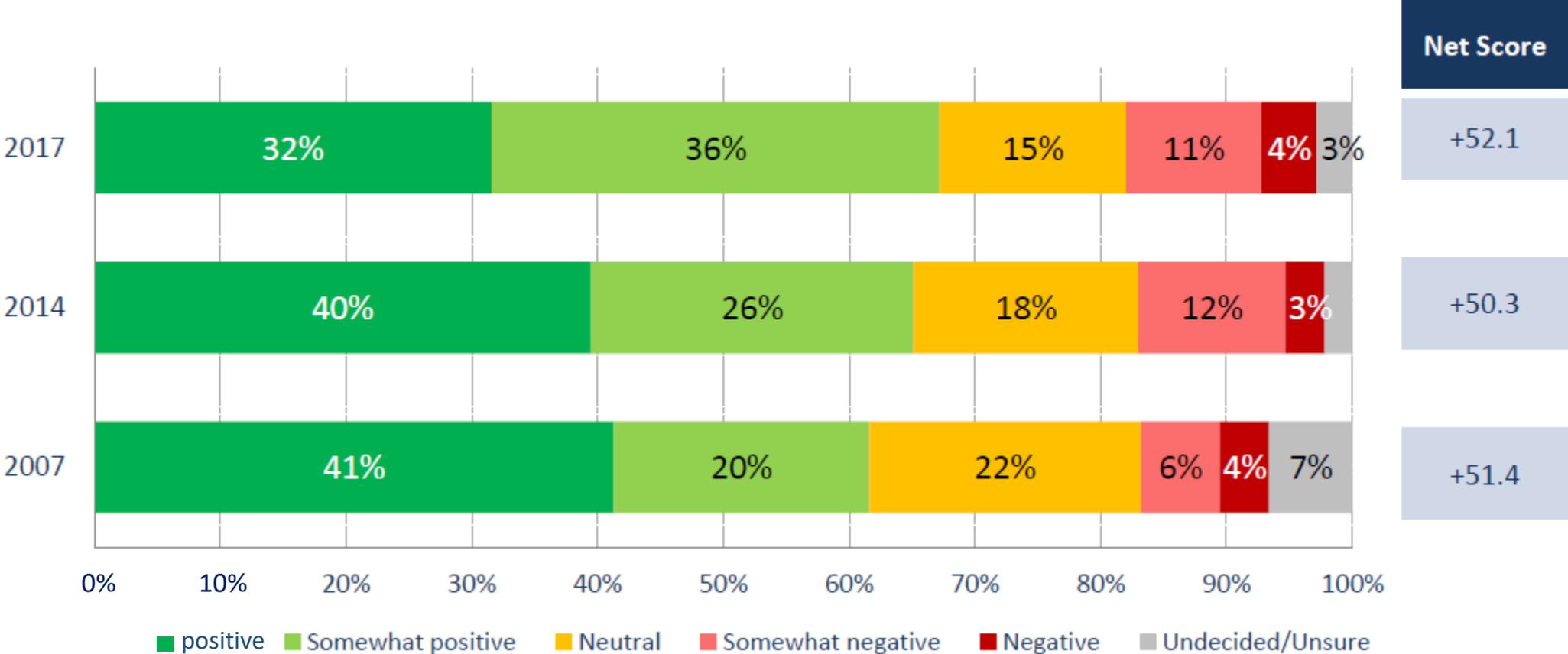
Subgroups	Positive	
	2017	2014
Atlantic (n=100)	35.8%	40.3%
Quebec (n=250)	25.1%	35.8%
Ontario (n=300)	28.7%	36.5%
Prairies (n=200)	32.6%	47.5%
British Columbia (n=150)	43.7%	40.4%
Male (n=468)	32.1%	38.8%
Female (n=532)	31.1%	40.1%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 29th and October 3rd, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, RDD dual frame hybrid telephone and online survey, January 18th to 26th, 2014, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Past Research

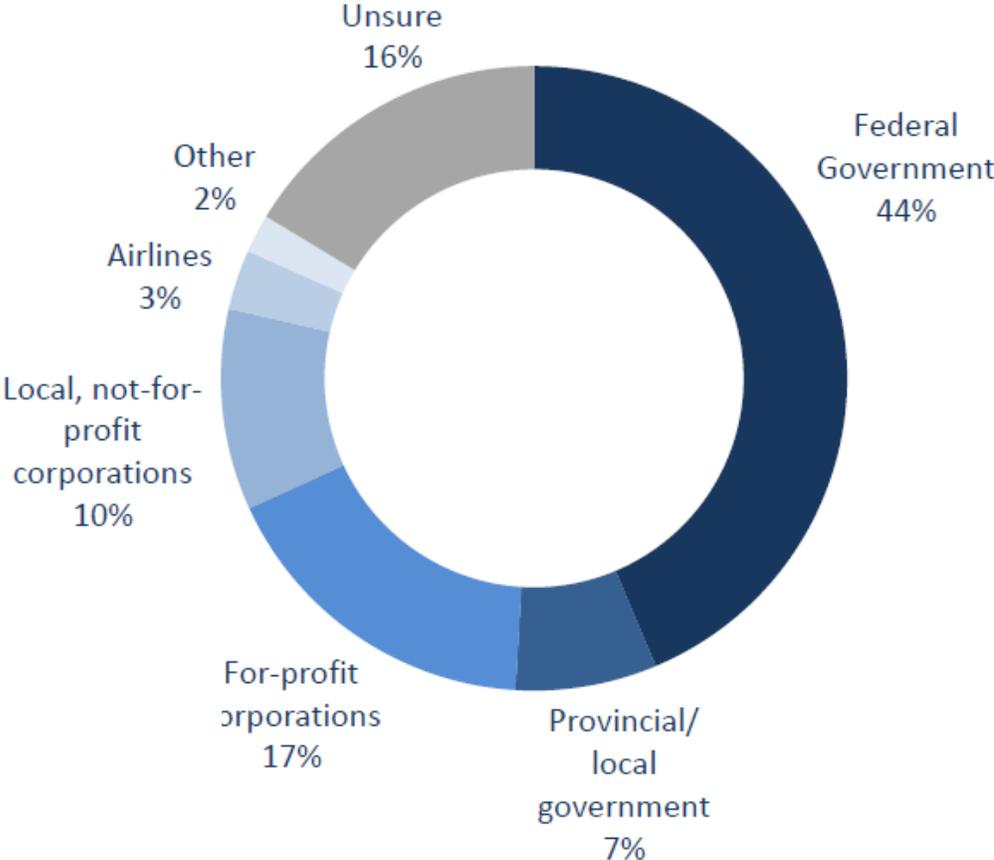
OVERALL IMPRESSION OF CANADIAN AIRPORTS (NANOS, 2007, 2014, 2017)



Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 29th and October 3rd, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.
 Source: Nanos Research, RDD dual frame hybrid telephone and online survey, January 18th to 26th, 2014, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.
 Source: Nanos Research, RDD telephone survey, March 31st and April 5th, 2007, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Past Research

WHO IS PRIMARILY RESPONSIBLE FOR OPERATING MAJOR AIRPORTS IN CANADA? (NANOS 2017)



Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 29th and October 3rd, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.
Source: Nanos Research, RDD dual frame hybrid telephone and online survey, January 18th to 26th, 2014, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



LEGER SURVEY RESULTS (2018)

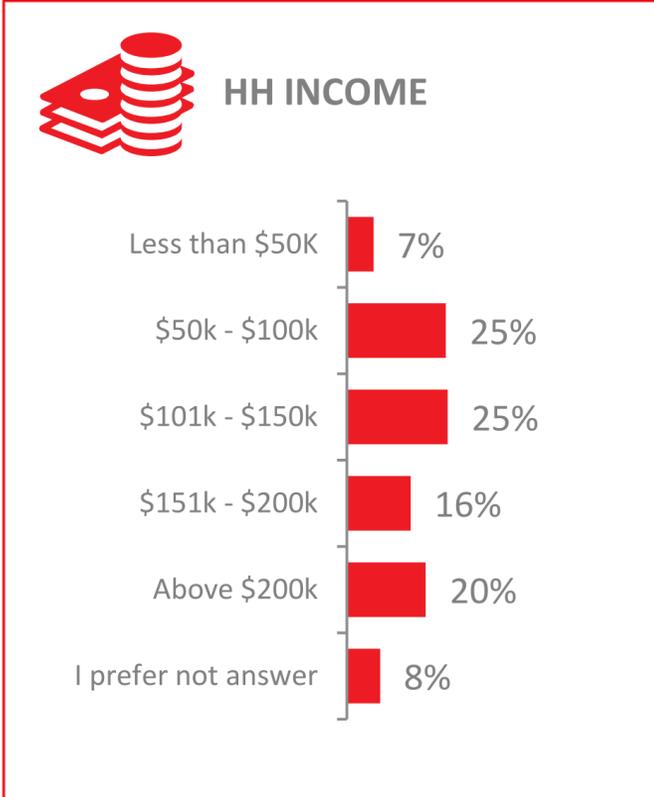
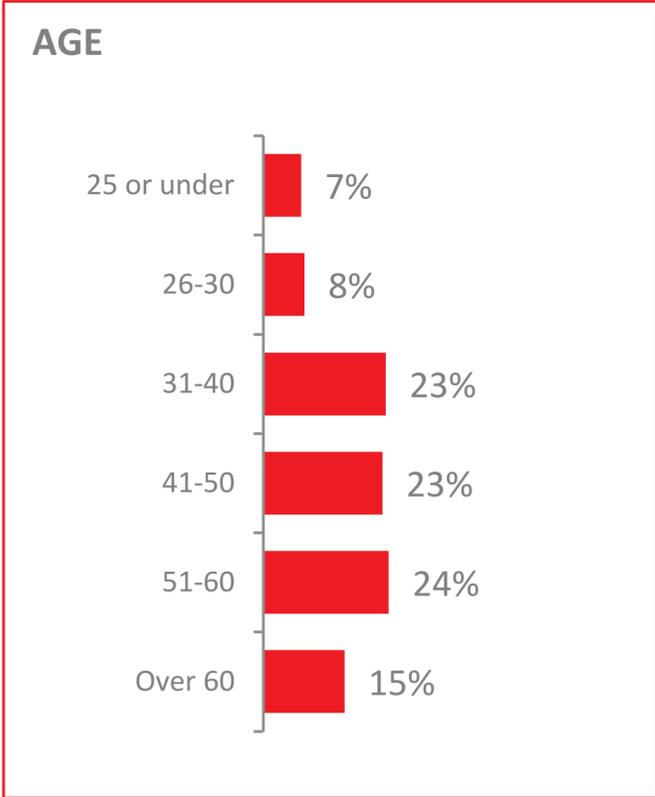
Methodology

- 2018 CAC survey done by Leger Research.
- Online survey of 500 Canadians from Toronto, Ottawa, Winnipeg, Edmonton, Calgary, Halifax, Montreal and Vancouver, who fly at least 10 times a year.
- In field between November 2 - November 18, 2018, using Leger's online panel of 400,000 members nationally (retention rate 90%).
- The margin of error for this study was equivalent to +/-4.4%, 19 times out of 20.



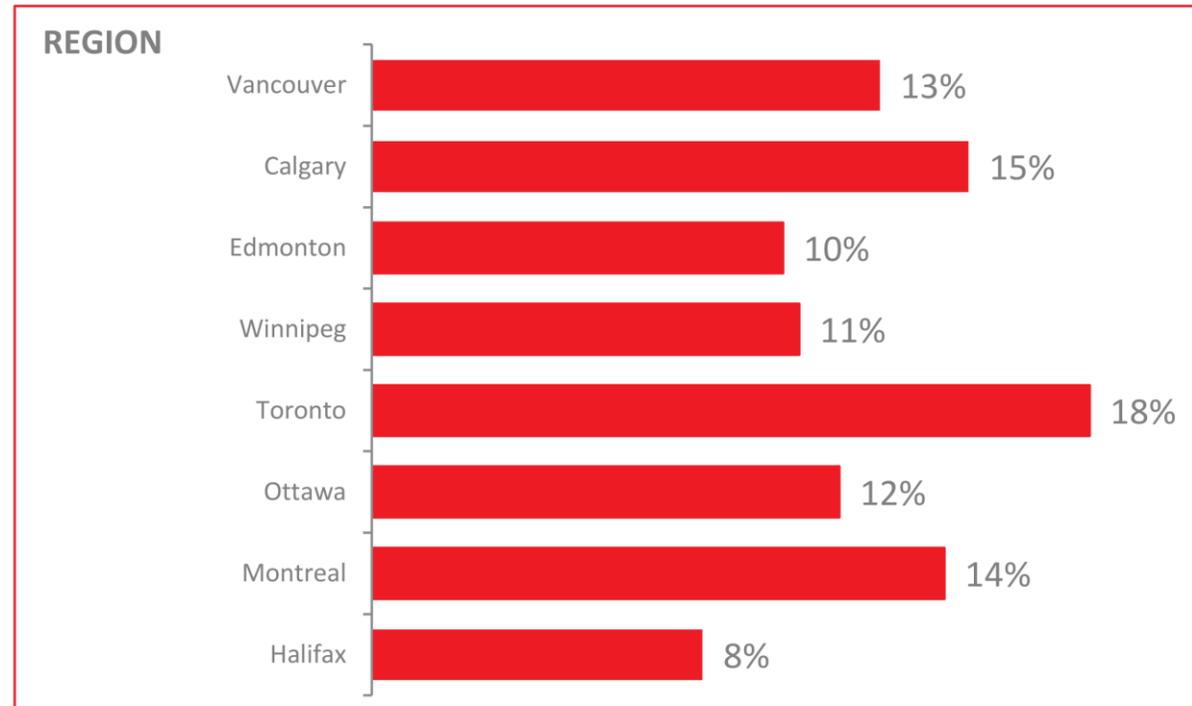
Demographics

- Our survey audience of “Frequent Business Travellers” look a little different than the general Canadian population
- Frequent Business Traveller audience skews more to males, to working years, and to higher incomes



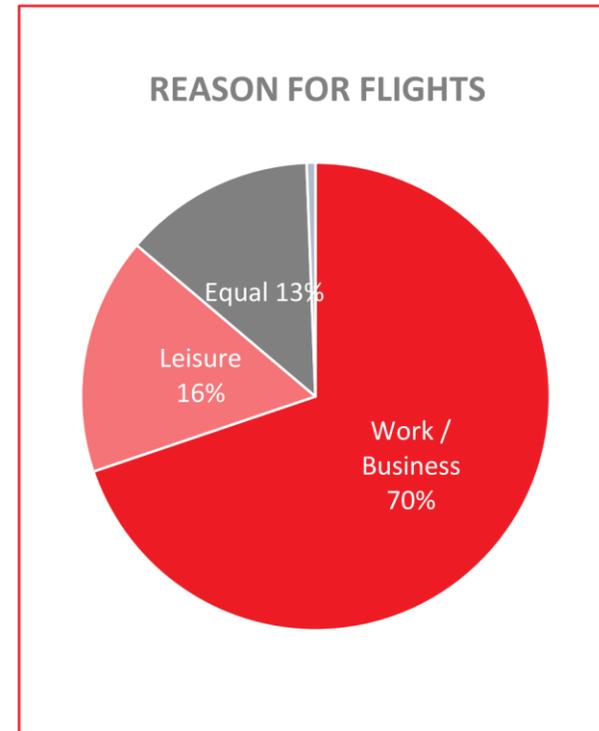
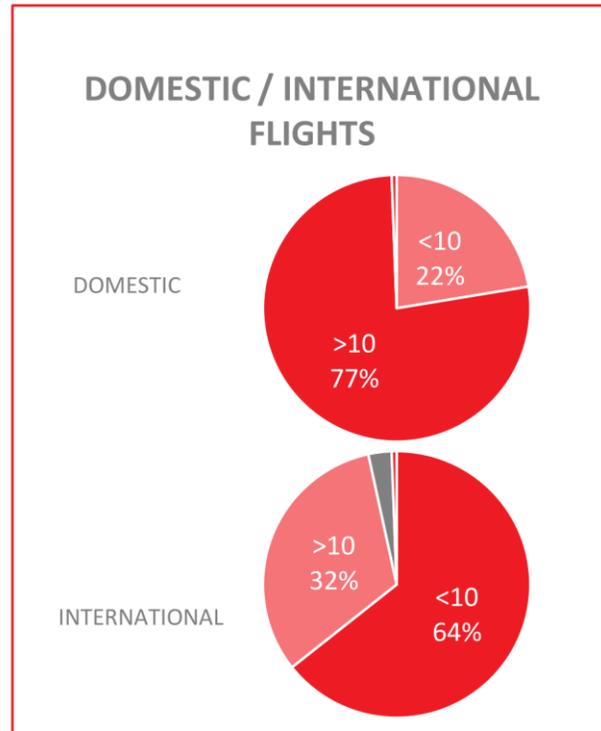
Demographics

- Geographically, the survey participants well balanced across major regions



Demographics

- Business travel overwhelming reason for air travel, significant domestic travel portion



Topline Results: Airports

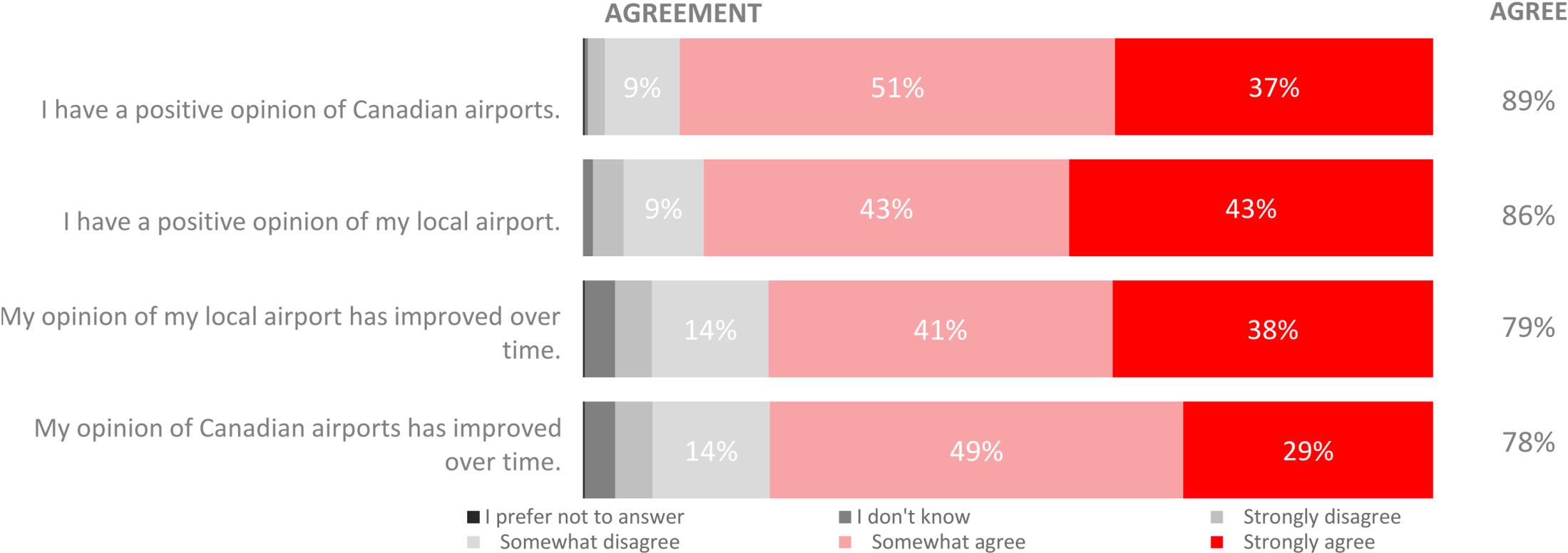
- General sentiments about airports are positive.
- The majority of frequent flyers have a positive opinion of Canadian airports (89%) including their local airport (86%).
- 28% of this group believes that for-profit corporations operate Canada's major airports.
- Overall, 63% believe that customs and security is most important to an enjoyable experience.



Findings: Airports

OVER THREE QUARTERS OF FREQUENT FLYERS HAVE A POSITIVE GENERAL SENTIMENT ABOUT CANADIAN AIRPORTS.

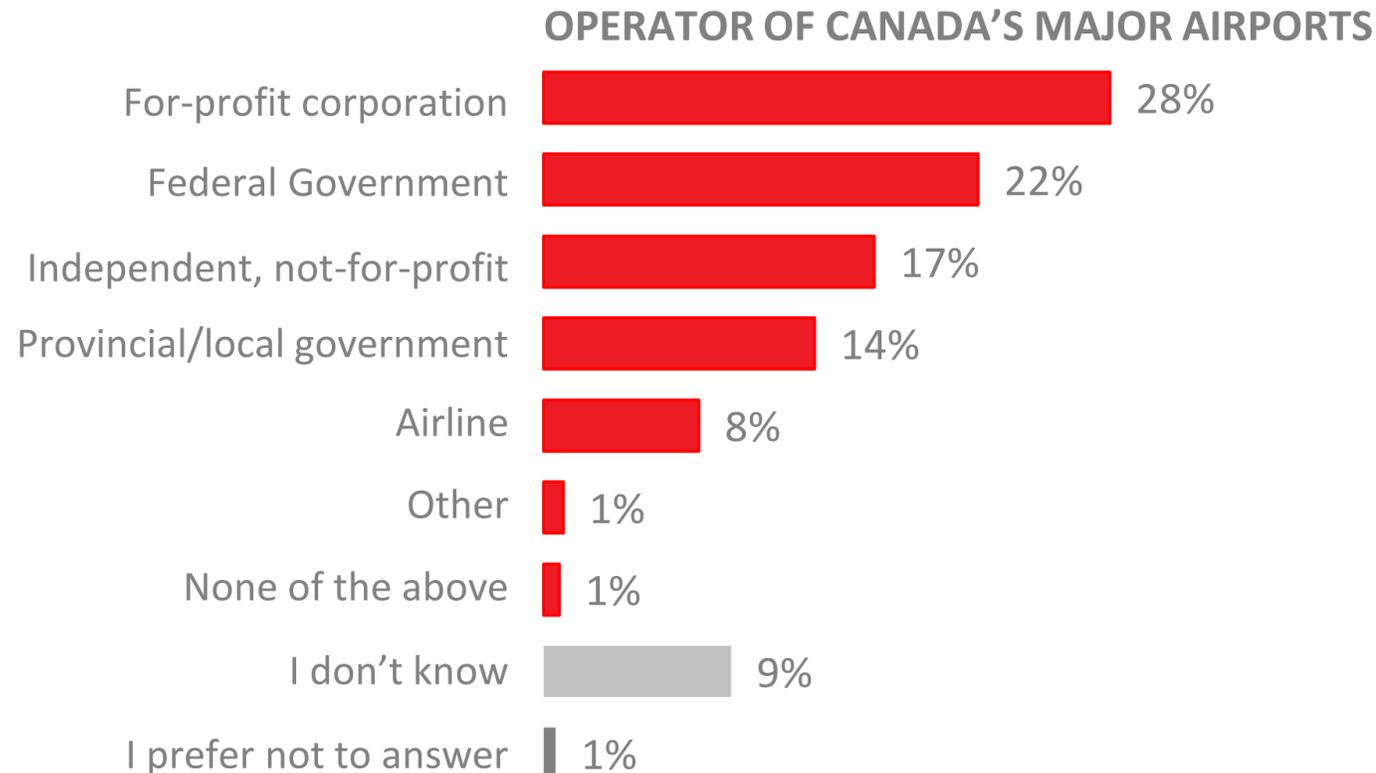
- Most have a positive opinion of Canadian airports (89%), and their local airport (86%).
- Torontonians significantly less likely to say their opinion of their local airport has improved over time.



Findings: Airports

OVER ONE QUARTER OF FREQUENT FLYERS BELIEVE THAT FOR-PROFIT CORPORATIONS OPERATE CANADA'S MAJOR AIRPORTS.

- 28% say that for-profit corporations operate Canada's major airports, 22% say they are operated by the Federal Government and 17% believe they are operated by an independent, not-for-profit organization.



Topline Results: Enjoyable Experience

When asked which is most important to an enjoyable airport experience:

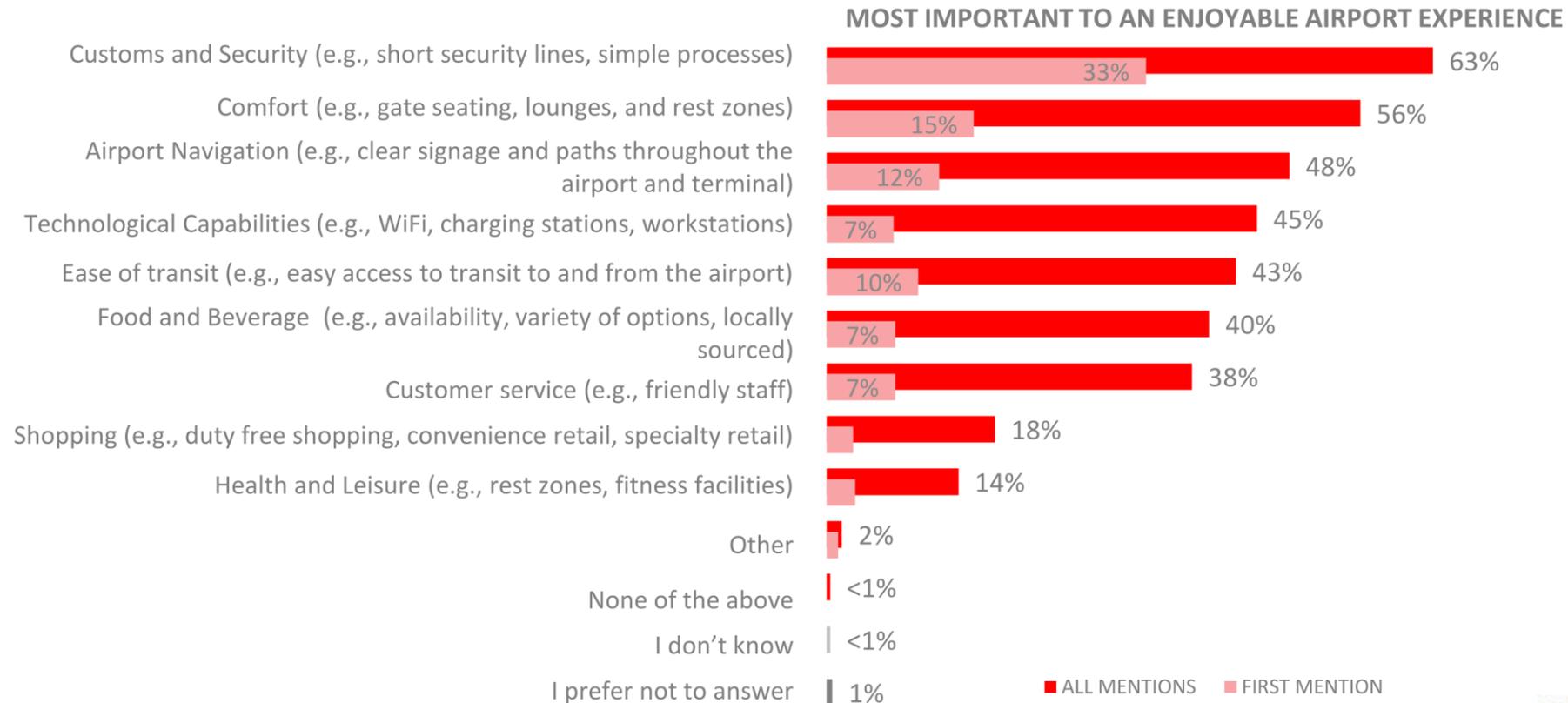
1. CUSTOMS & SECURITY (63%)
2. COMFORT (56%)
3. AIRPORT NAVIGATION (48%)
4. TECHNOLOGICAL CAPABILITIES (45%)
5. EASE OF TRANSIT (43%)
6. FOOD & BEVERAGE (40%)
7. CUSTOMER SERVICE (38%)
8. SHOPPING (18%)
9. HEALTH & LEISURE (14%)



Findings: Enjoyable Experience

6-IN-10 SAY THAT CUSTOMS AND SECURITY IS CONSIDERED MOST IMPORTANT TO AN ENJOYABLE AIRPORT EXPERIENCE.

- 63% believe that customs and security are most important to an enjoyable airport experience
- 33% selected this option as their first choice, by far the highest of the options presented.



Topline Results: Airport Experience

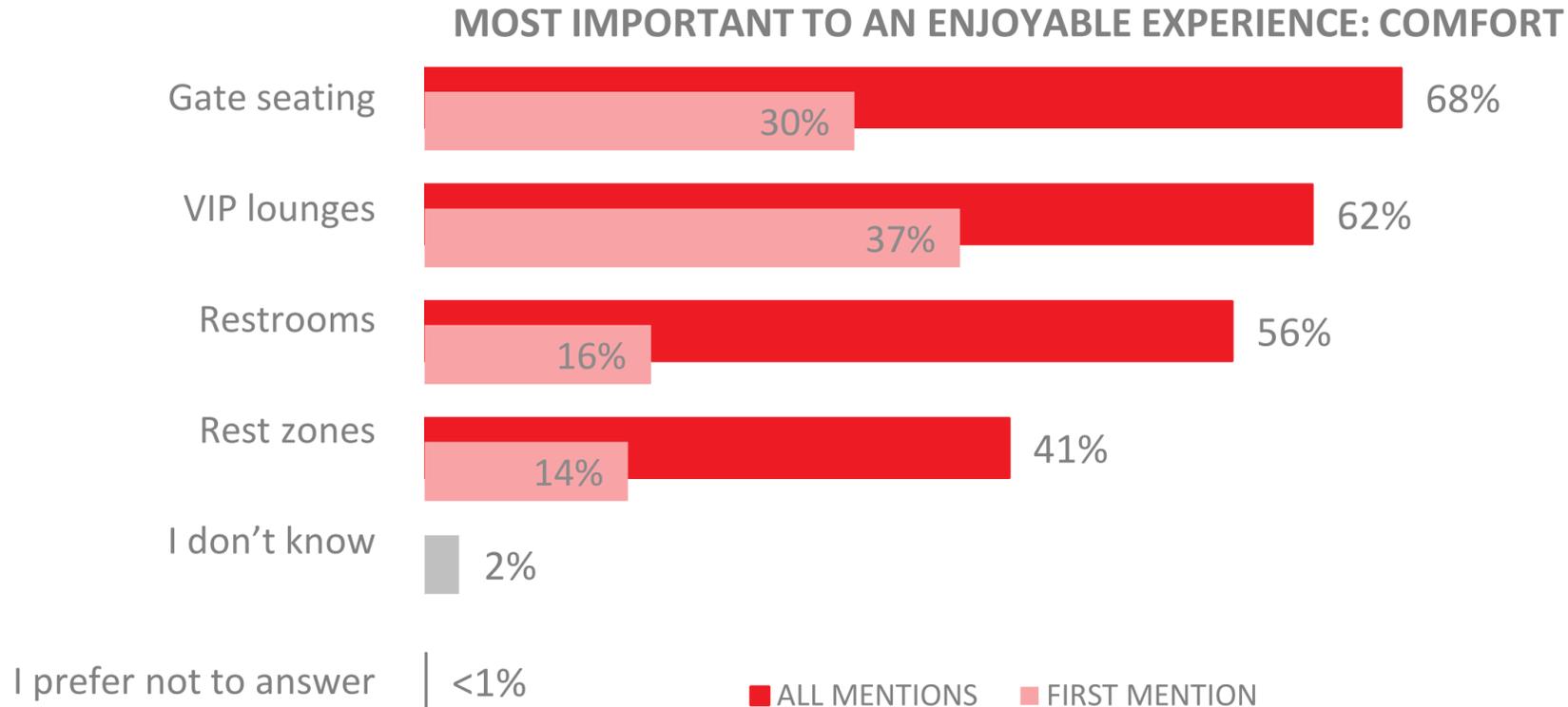
When asked about the importance of specific amenities within seven different categories, top answers were:

COMFORT	Gate seating	68%
TECHNOLOGICAL CAPABILITIES	Unlimited free wi-fi	83%
HEALTH & LEISURE	Retail stores/shopping options	52%
FOOD AND DRINK OPTIONS	24-hour food options	61%
SECURITY AND BORDER CONTROL	Fast moving security	80%
CUSTOMER SERVICE	Clean facilities	83%
NAVIGATION AND EASE OF TRANSIT	Ease of transit within airport terminals	46%

Detailed Findings: Amenities

6-IN-10 FIND GATE SEATING MOST IMPORTANT TO AN ENJOYABLE EXPERIENCE.

- Overall, 68% say that gate seating is important to an enjoyable experience.
- When looking at their first mentions only (or most important amenity), 37% selected VIP lounges – the highest
- For those in Ottawa, VIP lounges are considered most important (79%).

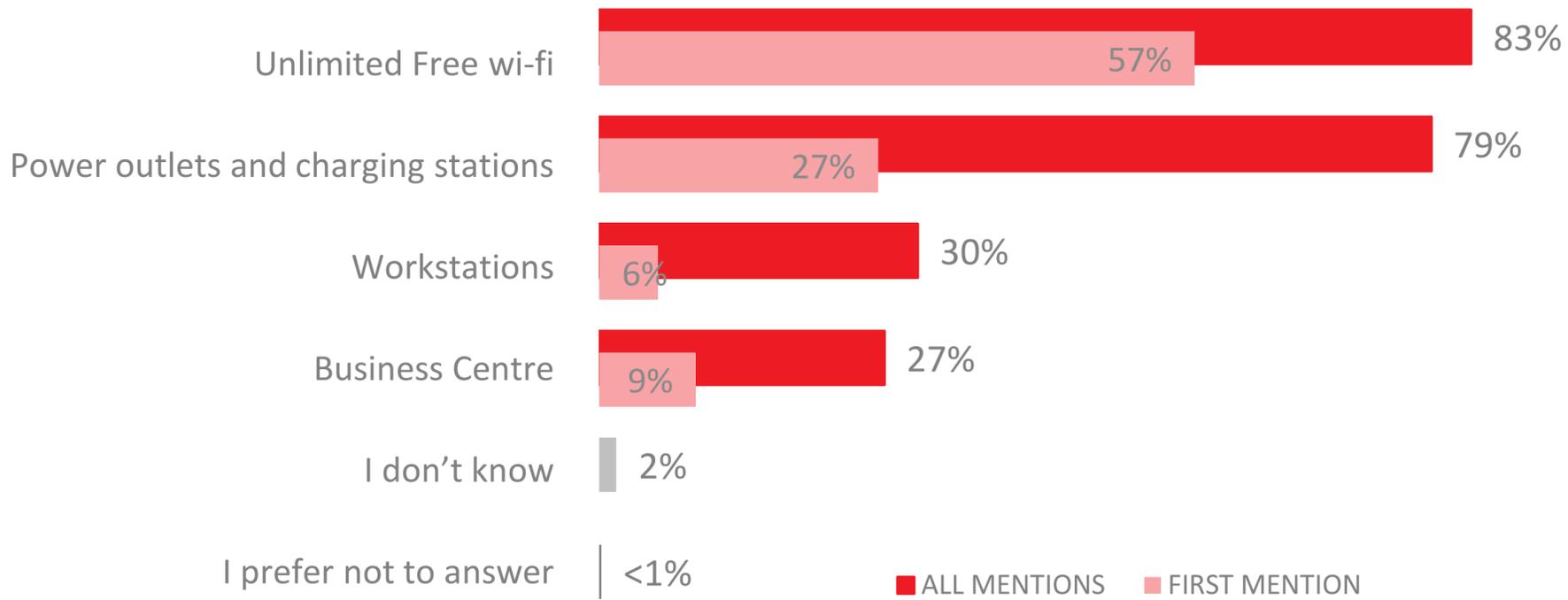


Detailed Findings: Amenities

OVER 8-IN-10 CONSIDER UNLIMITED FREE WI-FI THE MOST IMPORTANT AMENITY RELATED TO TECHNOLOGICAL CAPABILITIES.

- Out of the technology-related amenities listed, 83% say that “unlimited free wi-fi” is most important to an enjoyable experience.
- Strong consistency across the regions: Montrealers (92%) are most likely to say that unlimited free wi-fi is most important, whereas those in Vancouver are least likely to say the same (75%).

MOST IMPORTANT TO AN ENJOYABLE EXPERIENCE: TECHNOLOGICAL CAPABILITIES

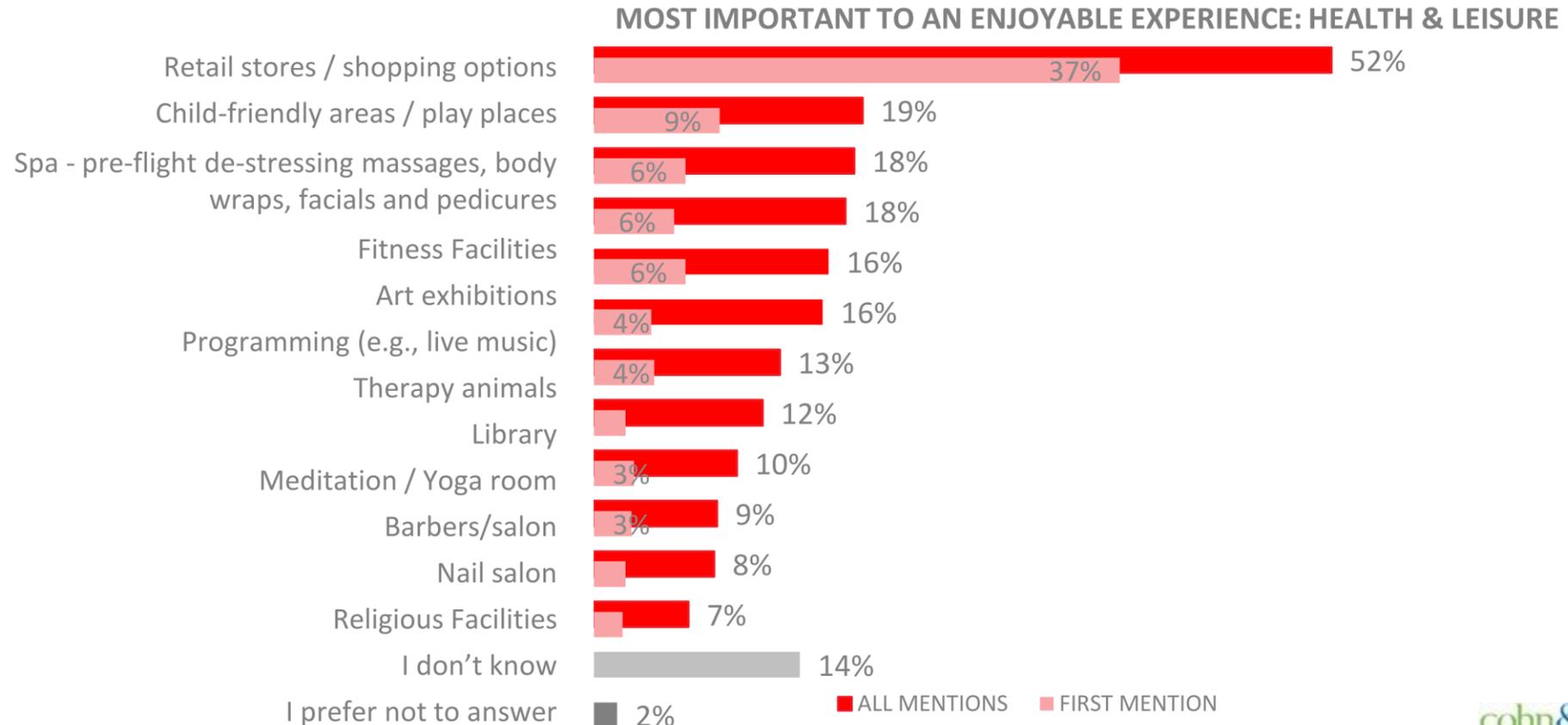


Detailed Findings: Amenities

THE MAJORITY OF FREQUENT FLYERS SAY THAT RETAIL STORES AND SHOPPING OPTIONS ARE MOST IMPORTANT.*

- 52% say that retail stores/shopping options are most important to an enjoyable airport experience.
- Those in Halifax are significantly more likely than any other regions to say that retail stores/shopping are most important

* OF THE HEALTH & LEISURE AMENITIES PROVIDED

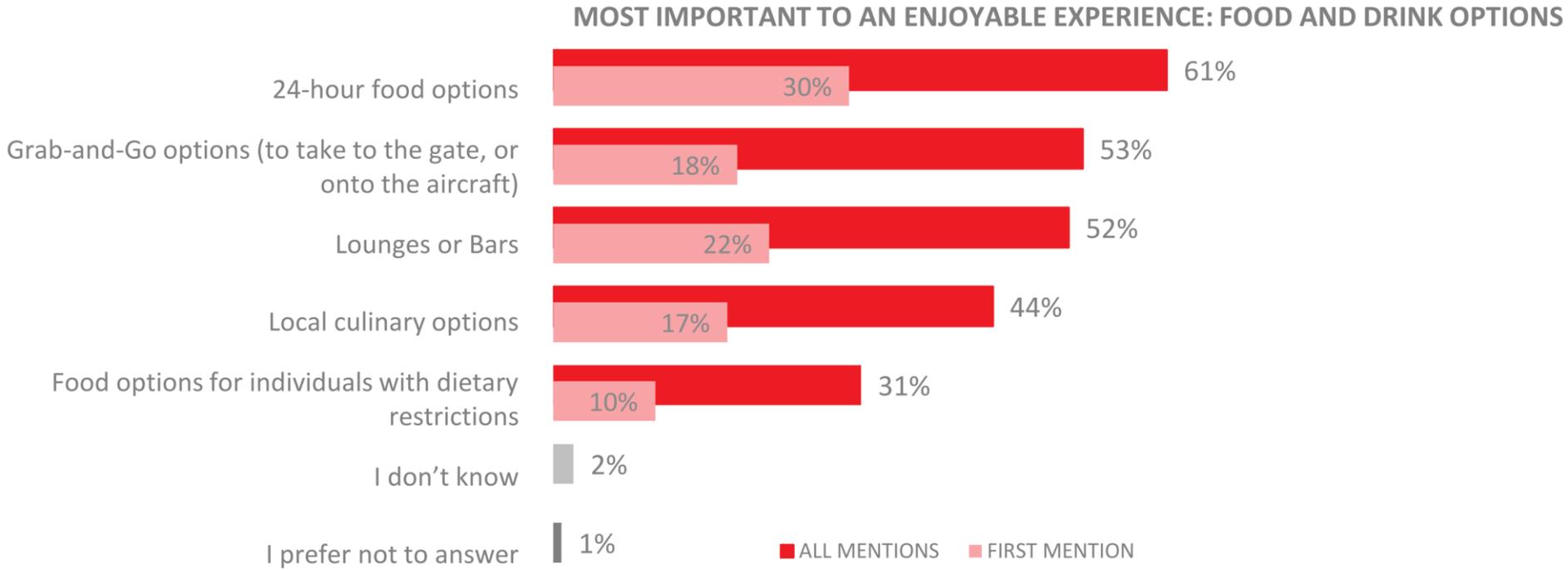


Detailed Findings: Amenities

6-IN-10 CONSIDER 24-HOUR FOOD OPTIONS MOST IMPORTANT TO AN ENJOYABLE EXPERIENCE*

- 61% say 24-hour food options are most important to an enjoyable experience.
- For those in Winnipeg, grab-and-go options (60%) are considered most important.
- For those in Ottawa, lounges or bars are considered the most important amenities to an enjoyable airport experience (60%).

*RELATED TO AIRPORT FOOD AND DRINK

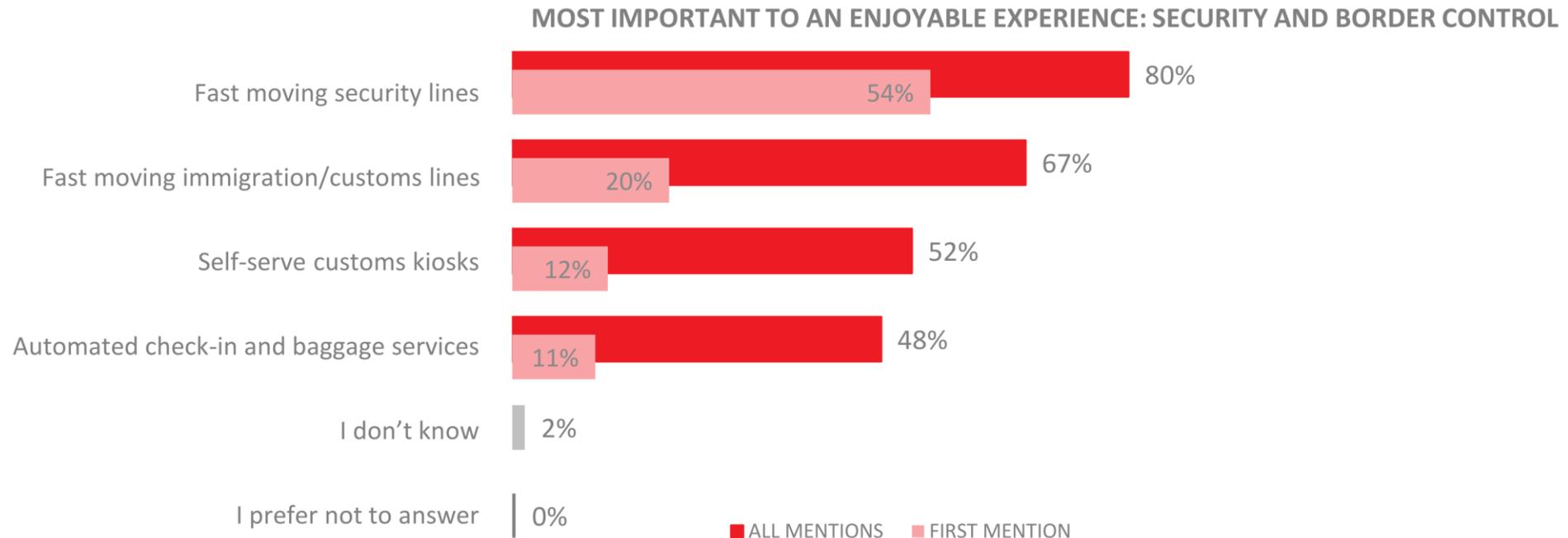


Detailed Findings: Amenities

8-IN-10 THINK FAST-MOVING SECURITY LINES ARE MOST IMPORTANT TO AN ENJOYABLE EXPERIENCE*

- 80% think that fast-moving security lines are most important to an enjoyable experience.
- Regionally, those from Calgary (85%), Ottawa (86%), and Halifax (88%) believe that fast moving security lines are most important at significantly higher levels than those in Toronto (69%).

*WHEN CONSIDERING SECURITY AND BORDER CONTROL

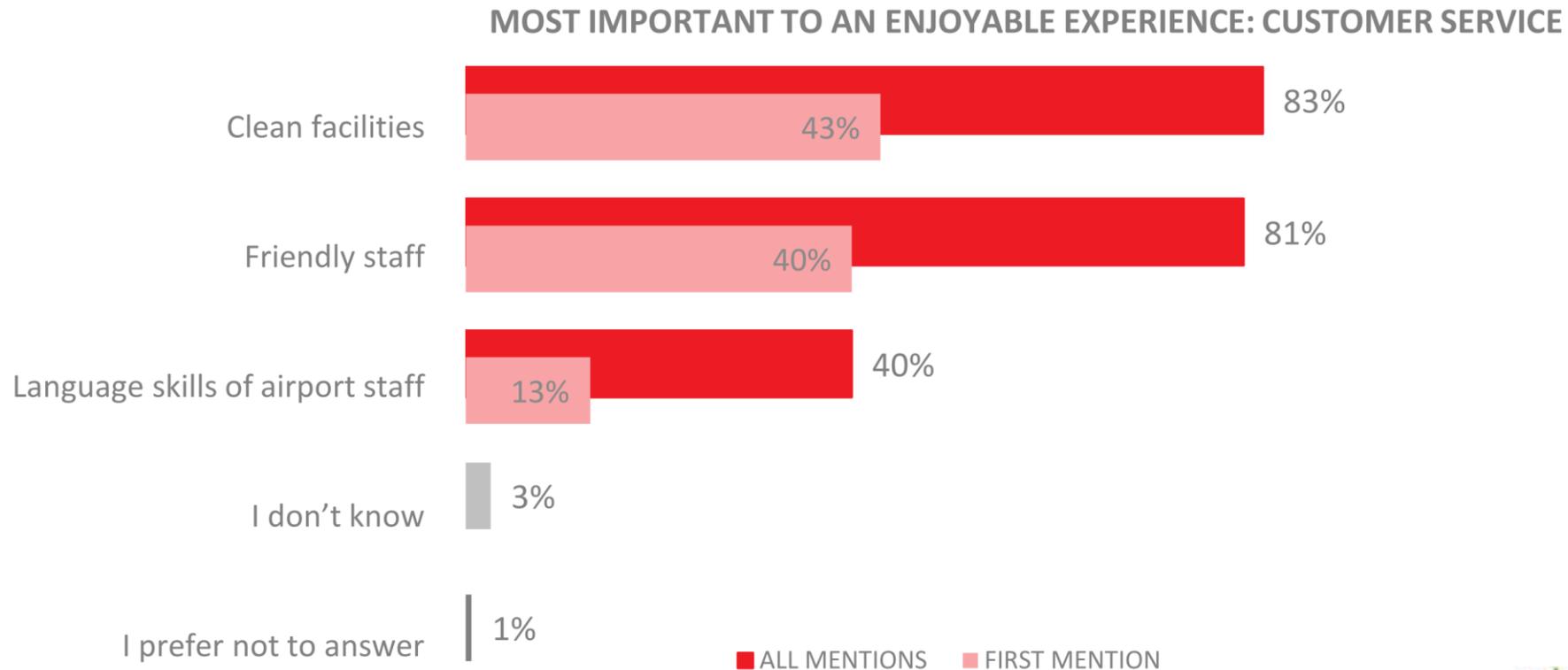


Detailed Findings: Amenities

OVER 80% THINK THAT CLEAN FACILITIES ARE MOST IMPORTANT TO AN ENJOYABLE EXPERIENCE*

- Clean facilities (83%) and friendly staff (81%) are considered most important to an enjoyable experience.
- Those in Montreal find language skills of airport staff (58%) more important than any other region.

*RELATED TO CUSTOMER SERVICE.

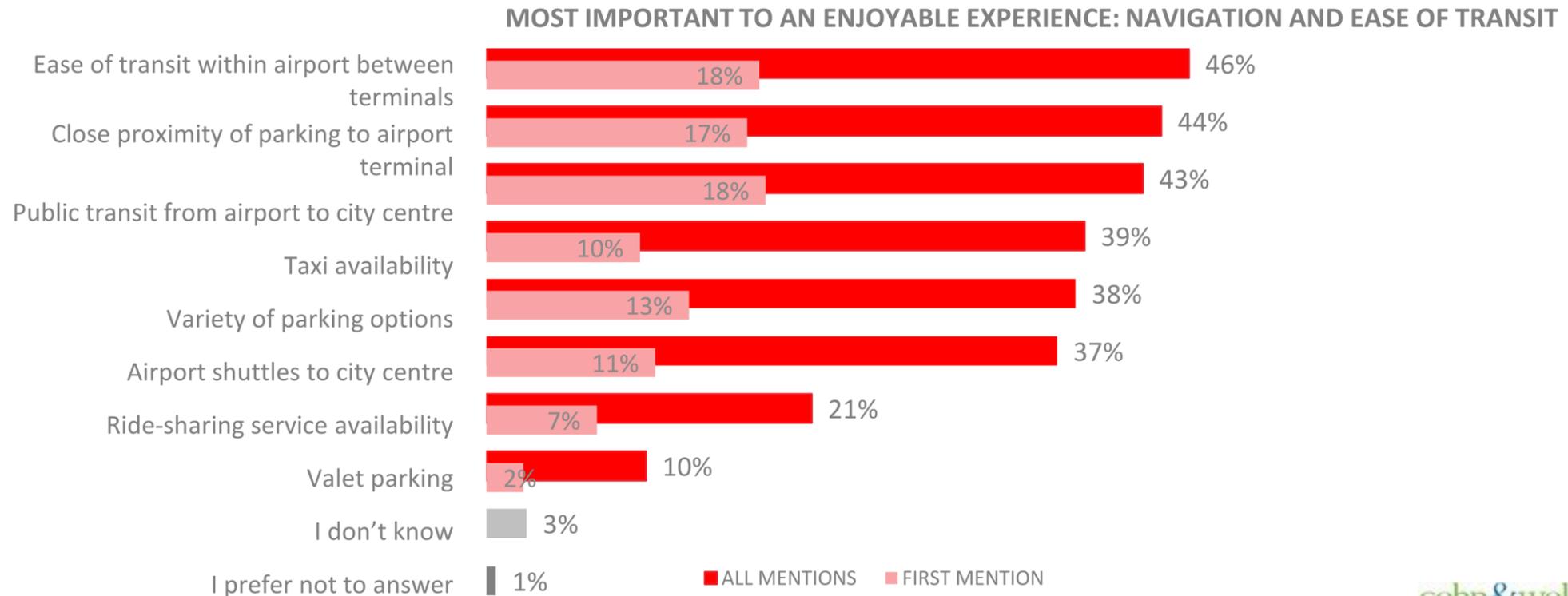


Detailed Findings: Amenities

46% CONSIDER THE EASE OF TRANSIT WITHIN THE AIRPORT BETWEEN TERMINALS MOST IMPORTANT TO AN ENJOYABLE EXPERIENCE.*

- Edmonton residents consider the variety of parking options (55%) most important.
- For those in Winnipeg, an airport shuttle to city centre (58%) is considered most important to an enjoyable experience.

*IN TERMS OF NAVIGATION



Topline Results: Media Consumption

Top mediums / channels for frequent Canadian flyers broken down personally and professionally:

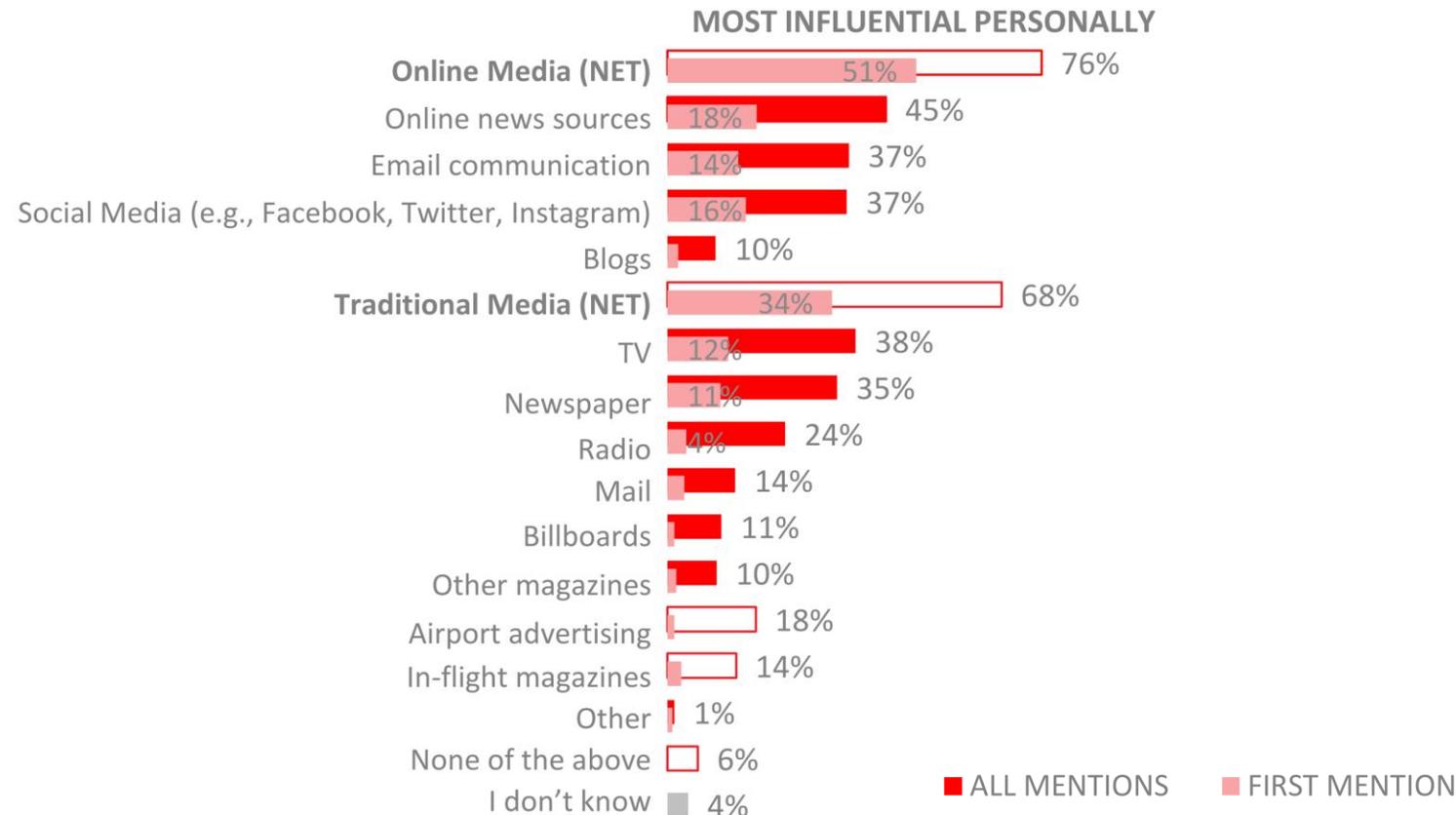
- 76% of frequent Canadian flyers say online media is most influential to them personally.
 - Specifically, 45% say online news sources are considered the most personally influential.
 - For business information, they rely on online news sources most (51%).
- 49% of frequent flyers say that Facebook is most influential *for them personally*.
- LinkedIn considered most influential social media channel *for business* (45%).



Findings: Media Consumption

THREE QUARTERS OF FREQUENT FLYERS CONSIDER ONLINE MEDIA THE MOST INFLUENTIAL TO THEM PERSONALLY.

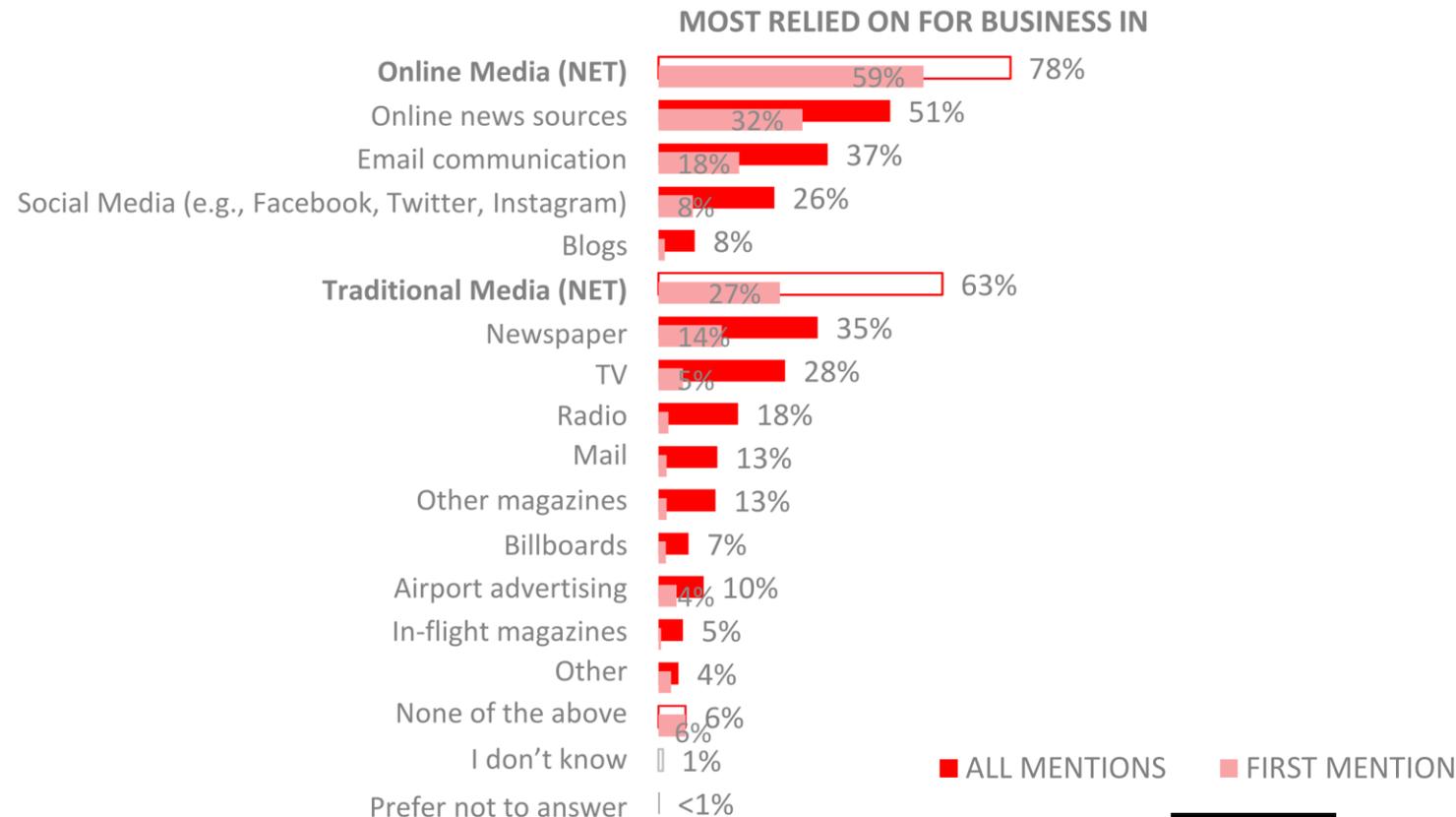
- Online news sources (45%), TV (38%), email communication (37%) and social media (37%) are most influential to this group.
- Those in Winnipeg find traditional media significantly more influential than those in Toronto (61%), and Montreal (61%).



Findings: Media Consumption

ONLINE NEWS, EMAIL AND TV ARE MOST RELIED ON FOR BUSINESS INFORMATION.

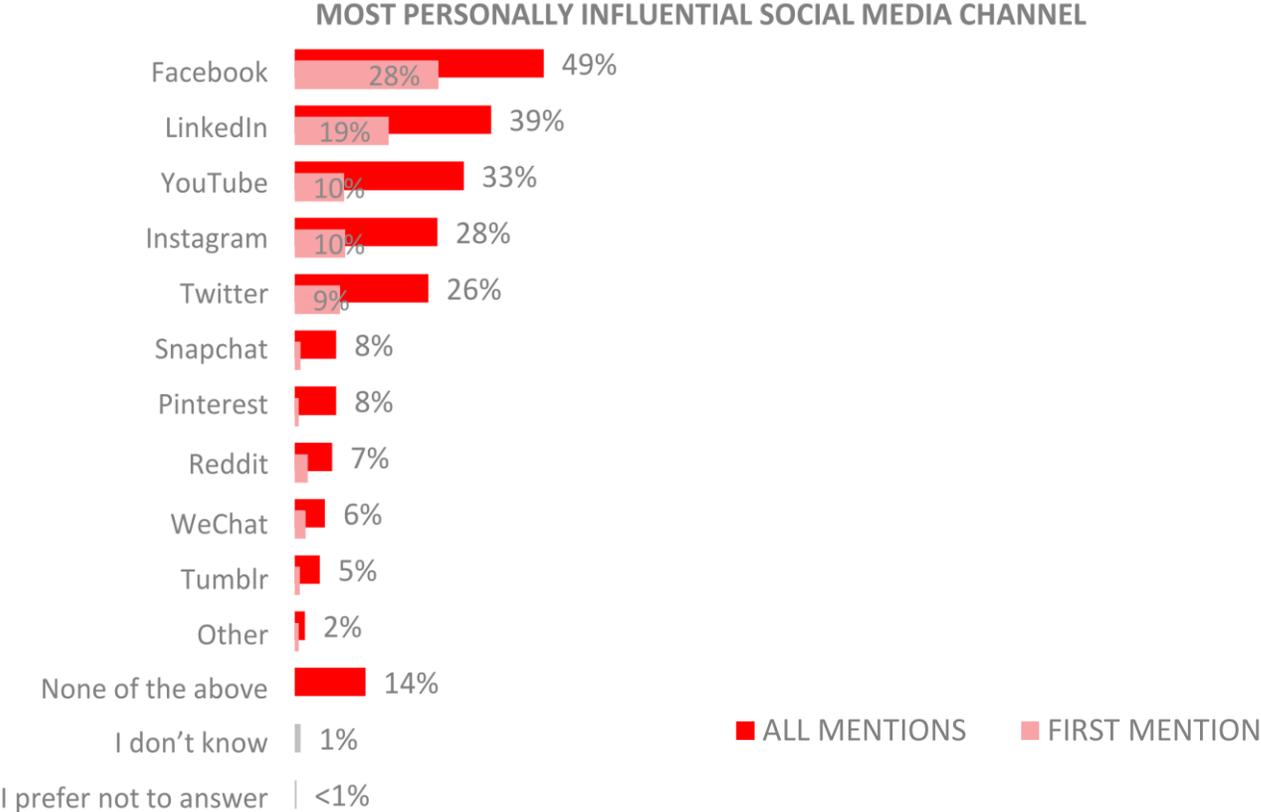
- 51% of frequent flyers rely on online news sources most for business information.
- Those in Vancouver (86%) and Calgary (85%) rely on online media significantly more than those in Toronto (65%).



Findings: Media Consumption

ALMOST HALF CONSIDER FACEBOOK TO BE THE MOST INFLUENTIAL TO THEM PERSONALLY.

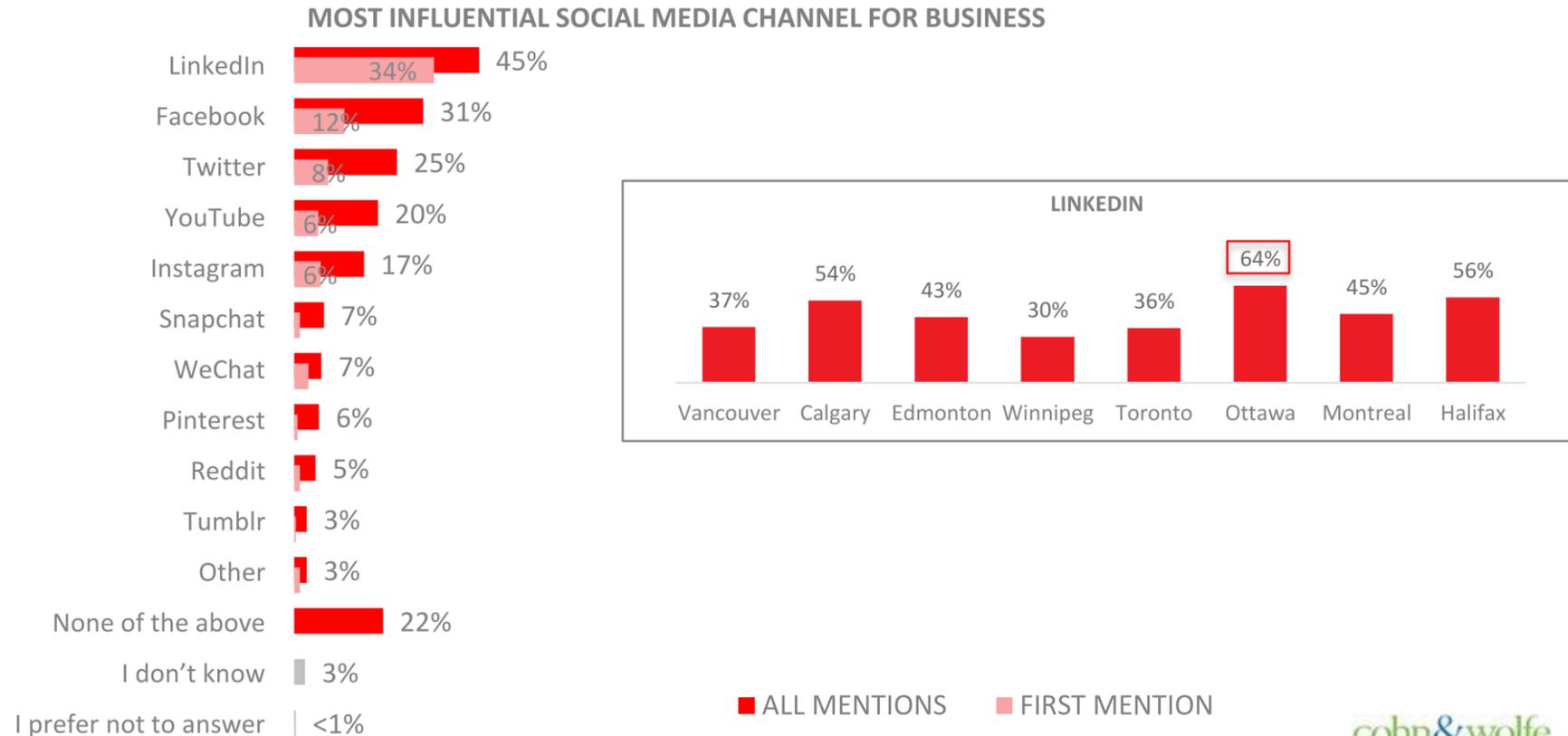
- 49% of frequent flyers find Facebook to be the most personally influential social media channel.
- When comparing results regionally, those in Halifax find Facebook to be the most personally influential (59%), whereas Torontonians find it the least influential (36%).
- LinkedIn is considered the most personally influential social media channel among those aged 51-60 (32%)



Findings: Media Consumption

4-IN-10 CONSIDER LINKEDIN TO BE THE MOST INFLUENTIAL SOCIAL MEDIA CHANNEL FOR BUSINESS.

- Those in Ottawa (64%) find LinkedIn significantly more influential for business than those in Vancouver (45%), Winnipeg (30%), and Toronto (36%).



Insights and Actions

- Wonder Takes Flight campaign has been heavily informed by this research.
- Media placement on Facebook and LinkedIn formed backbone of digital ad buy.
- Findings about ownership knowledge, and amenities to inform future phases of campaign.



QUESTIONS