

Drivers of Ridership

April 2018 to January 2019

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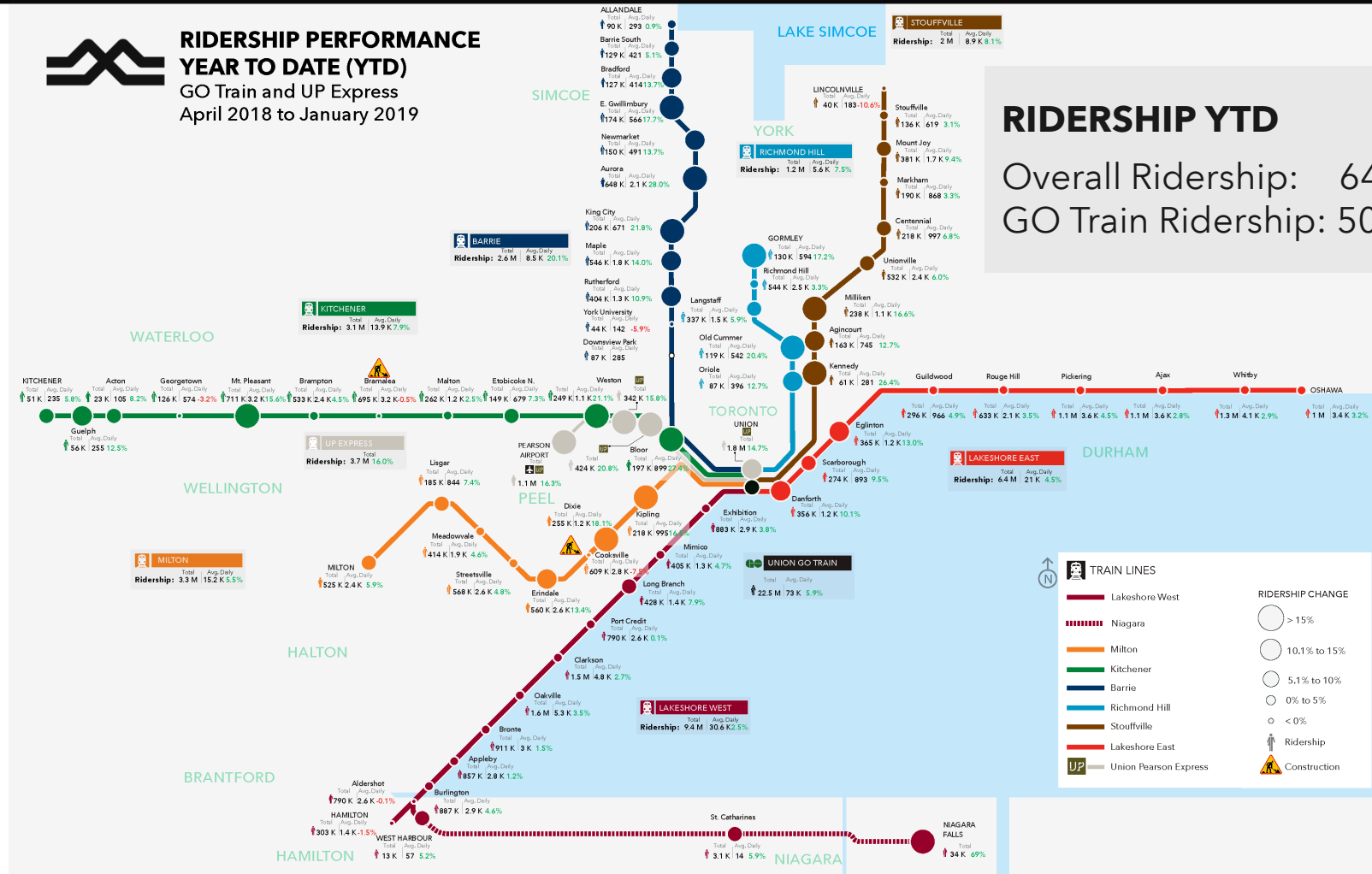
Ken Kuschei, Director, Customer Insights

EXECUTIVE SUMMARY

- Key year-to-date insights (April 2018 to January 2019) include:
 - GO ridership overall growth on track, up 5.8% year over year (3.1% to budget)
 - GO Barrie's service was up 20.1% while UP Express increase by 16.0%
 - Major sporting & entertainment events provide growth opportunities to adjust our service and to drive ridership and revenue
 - Extreme weather events impact ridership, but also highlight opportunities on how we can improve customer communication and services offered
 - Increased midday service on the Lakeshore Corridor is making it easier for even more customers to get to their destinations
 - In addition to restoring the Bramalea express train, we've also introduced an additional service to Bramalea further improving the evening service along the Kitchener Corridor

FROM DATA TO INSIGHTS

Ridership data¹ populates summary maps that, together with analytical tools, validates performance drivers, and highlights key learnings and insights to build future ridership demand.



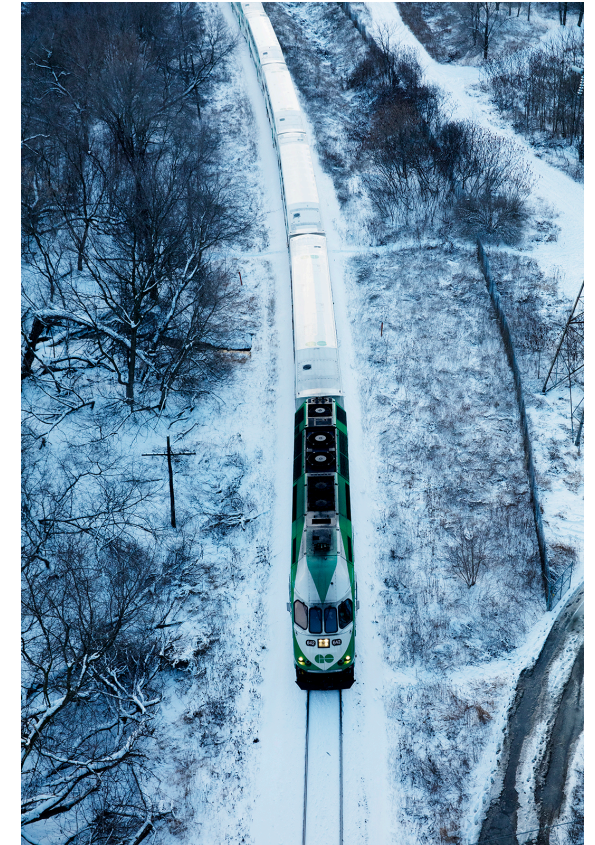
IMPACT OF EVENTS ON RIDERSHIP

Service changes, extreme weather, and entertainment events impact network growth. Learning has informed improvements in customer service plans and communication to optimize ridership.

- Network ridership increases on special event days, such as sporting events, concerts and festivals
 - The Santa Claus Parade on November 18, 2018 increased ridership by approximately 14K²
 - A Toronto Maple Leafs weekend home game results in an average increase of approximately 3K additional rides
- The 26.4 cm of snow on January 29, that led to school closures and bus cancellations, resulted in a ridership decrease of 103K, or 36%, as parents and caregivers stayed home to look after their children

ACTION:

- Plan services and event partnership and collaboration to provide new reasons for customers to travel with GO
- Leverage analytics from historical events to improve customer service communications and mitigation measures from extreme weather



IMPROVED OFF-PEAK SERVICE ALLOWS MORE PEOPLE TO GET TO THEIR DESTINATION

Increased midday service on the Lakeshore Corridor continues to experience ridership growth with significant potential to build off-peak demand and provide customers more choices.

- 43 midday trips per day added to the Lakeshore Corridor on September 24, 2018, increased ridership by 63,000³ (approximately 3.5% daily)
- The introduction of 'Kids GO Free' in March and current campaign illustrate the opportunity to build ridership demand for off-peak and midday service
- Increased services provide customers options when disruption occurs. While extreme weather reduced ridership overall, the midday service was resilient with some days showing growth

ACTION:

- Opportunity to build demand for off-peak services through targeted marketing communication, promotions, incentives & rewards
- Continued off-peak service expansion to encourage discretionary customer trips on GO and shift peak ridership to help mitigate crowding



CUSTOMER READINESS TO GUIDE FUTURE SERVICE CHANGE DECISIONS

Analytics is now an embedded part of the trip planning, customer communications, and operational readiness processes.

- From January, analytics have informed the service change process including the re-introduction of the Kitchener Corridor express train to Bramalea and additional all stop train to Bramalea in February
- The updated process provided a new perspective to help balance out operational considerations with tracks we share with CN/CP
- Analytics informed adjustments of the Kitchener Corridor service to help mitigate crowding and recognizing the significance of On-Time Performance to get customers home to their families



ACTION:

- Continue to use customer analytics to inform of service planning changes and customer readiness input and communication for future changes

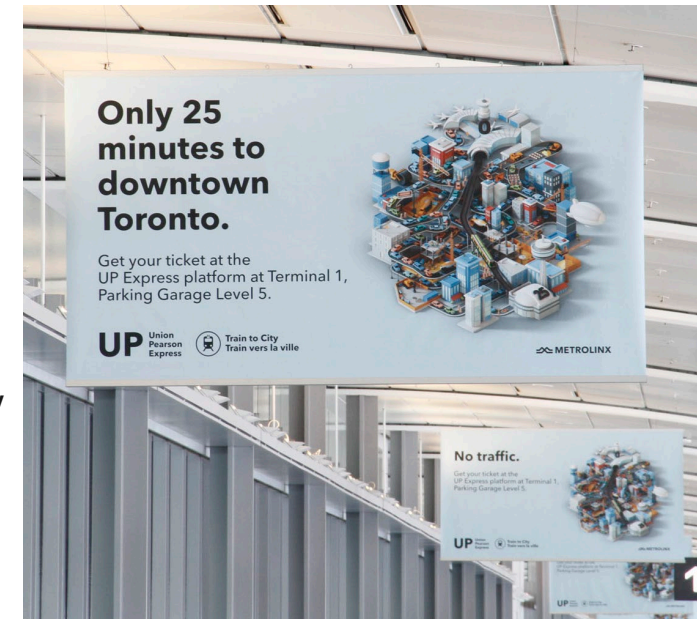
UP EXPRESS GROWTH CONTINUES WITH THE DELIVERY OF A GREAT SERVICE

UP Express double digit ridership⁴ growth can be attributed to providing a differentiated airport service that consistently delivers a 25-minute trip from Union to Pearson.

- UP Express continues to see vibrant ridership growth of +16.0% year-to-date, validating UP Express continues to meet customer's high expectations
- The 86% customer satisfaction score of UP Express is driven by consistent on-time performance (95.4%), amenities that create an enjoyable trip, and consistent delivery on our promise of 25-minute trips from Union to Pearson
- An integrated Greater Toronto Airports Authority (GTAA) / UP Express campaign has created demand that includes customer touch points throughout the customer journey; trip planning, terminal & airline messaging, baggage hall, kiosk & platform ticket sales

ACTION:

- Continue to collaborate with our GTAA partnership to enhance the customer experience informed by learning, insight and ongoing monitoring



WHAT'S NEXT

Continue to identify opportunities to 'Connect our Communities' to drive ridership demand, deliver customer service increases and improved customer satisfaction

- Use data and insights to support the implementation and validation of pilots, events, promotions that target specific customer audiences with services and communication to drive ridership growth
- Focus on speeding up the process of converting data into insights, thus reducing the time to make decisions while shortening the time to positively impact our customers
- Ensure the process of uncovering insights continues to be collaborative, to fully understand the impact of the numbers
- Continue to strengthen our capabilities to strike the right balance of investing in the future while consistently delivering on today's needs



