

To: Metrolinx Board of Directors
From: Mark Childs
Chief Marketing Officer
Date: September 11, 2025
Re: Marketing Quarterly Update

Metrolinx sustained last quarter's ridership momentum to reach a post-pandemic recovery high of 100.6 per cent for GO and 108.1 per cent for UP in July 2025 compared to 2019. This strong performance was supported by demand-driving GO Leisure campaigns, partner value-add offers, seasonal service changes, to help our customers enjoy the best of the summer season, for tourism to destinations, cultural events, sports, games, and concerts across the region, including the inaugural Rogers Stadium shows.

GO & UP continue to exceed customer satisfaction (CSAT) targets, with the most recent July CSAT at 85 per cent for GO and 92 per cent for UP. This fiscal CSAT performance has been supported by improved customer communication, flexible payment options, increased service frequency to meet customers' schedule needs, and reinforced by 'Safety Is' and 'Etiquette' campaigns.

Ridership Highlights

This quarter, our customer brand and partnership plans, including geo-targeted advertising, contests, and event pre-promotion, inspired customers to explore the best of the region's summer destinations, sporting events, and concerts, including Canada's Wonderland, Toronto Zoo, and PRIDE. Year-over-year ridership growth of +24 per cent, +21 per cent, and +8 per cent at Honda Indy, Blue Jays gamedays, and the Toronto Caribbean Carnival, together with the new ridership to Rogers Stadium concerts, drove a +6.5 per cent increase in average daily weekend ridership in July compared to 2024.

As the summer drew to a close, we encouraged travel to the Canadian National Exhibition with affordable CNE combo tickets, PRESTO Perks, customer contest, and more frequent Lakeshore GO train frequency. Additional Exhibition GO Station customer service ambassadors, brand ambassadors, and GO Bear were on hand to support customers, and engage our youngest riders with fun Kids on the GO Club activities and GO bus tours.

As students return to school after the summer break, we are engaging Gen Z and student audiences with a refreshed back-to-school GO campaign highlighting student concessions, services to college and university routes, and planned engagements at the Ontario University Fair, Student Life Expo, and Reading Week in the fall.

We continued to support business ridership with customer communications and service additions in April, supporting schedule flexibility. The 'Good to GO' commuter campaign and ongoing strategic partnerships with Starbucks, Simplii Financial, Amex, Voila, and OLG

supported increased travel frequency with offers and incentives. In July 2025, year-over-year peak average daily ridership grew by +16.1 per cent to reach a recovery high of 80.9 per cent compared to 2019, surpassing Toronto office occupancy of 78 per cent.

Metrolinx partnered with conference event organizers, including the Alzheimer's Association, to support over 1,000 conference attendees this quarter.

Customer Experience

Customers were encouraged to enjoy the best of our region's summer and early fall season with 88 value-added PRESTO Perks currently available and 131 year-to-date, a growth of +29.7 per cent compared to 2024. New customer offers were added this past quarter, including MLSE Live offer for Rogers Stadium and Budweiser Stage, AFC Toronto, CPKC Women's Open, and Globl Jam 2025. Customer satisfaction for PRESTO Perks remains high at 86 per cent.

Metrolinx continues to celebrate our region's cultural diversity with the GO Newcomer and content-creator campaign continuity, outreaching to newcomers and airport travellers. Plans are underway to celebrate the Mid-Autumn Festival and Diwali this fall.

Partnerships with two major local events delighted customers with the BaTO Cultural Festival at Richmond Hill GO and Durham Summer Fest at Ajax GO.

Expanded food and beverage offerings across 140 vending machines, the opening of Second Cup at Bramalea, and Cup2GO coffee at 407 Bus Terminal, Appleby, and Long Branch stations helped to enhance the trip journey experience.

As we head into fall, our refreshed GO Leisure, UP, and PRESTO campaigns will inspire trips to an exciting roster of events and destinations, including the Toronto International Film Festival and Oktoberfest. We look forward to welcoming GO and UP customers back to their routines, attending new sports season games, and exploring the changing colours of our region's leisure destinations.

Enjoy the ride.

Respectfully submitted,

Mark Childs
Chief Marketing Officer