

Greater Toronto Airports Authority Cargo Stakeholder Survey Preview

Please use the following as a guide to prepare for responding to the [survey online](#). Note that all questions that appear in **bold** are considered mandatory when filling out the survey online. If the question is not applicable but the question is mandatory, please use the text box to indicate 'not applicable.'

If you have any questions or require support, please contact Natalie Moncur, Manager, Market Investment, GTAA at Natalie.moncur@gtaa.com

Q: What is the name of your company/organization?

A: Open field

Q: What category does your job title fall under?

A: Coordinator, Manager, Director, Executive

Q: Which association/organization referred you to this survey?

A: Open field

Q: Approximately how many people work at your company in Canada?

A: 1-50, 51-100, 101-150, 151-200, 201-300, 301-400, 401-500, 501-1000, 1001-2000, 2000+

Q: Where in Canada does your company operate? (i.e. city, province)

A: Open field

Q: Where is your company's global headquarters (City, Country)?

A: Open field

Q: What was your company's 2019 revenue (in CAD)?

A: Open field

Q: What is the postal code for your Greater Toronto Hamilton Area air cargo operations base (i.e. A1A 1A1)?

A: Open field

Q: What category best describes the goods your company produces and/or ships by air? Please select all that apply.

A: Animal/plant materials/products, Food products, Live animals/plants, Manufactured goods, Media, Minerals/materials, Pharmaceuticals, Specialty materials/products, others

Q: What percentage of your business is ad hoc versus long-term clients?

A: 0-10% ad hoc, 10-20% ad hoc, 20-30% ad hoc, 30-40% ad hoc, 40-50% ad hoc, 50-60% ad hoc, 60-70% ad hoc, 70-80% ad hoc, +80% ad hoc

Q: Approximately what share of your air cargo tonnage is export?

A: 0-10%, 10-20%, 20-30%, 30-40%, 40-50%, 50-60%, 60-70%, 70-80%, +80%

Q: Approximately what share of your air cargo tonnage is import?

A: 0-10%, 10-20%, 20-30%, 30-40%, 40-50%, 50-60%, 60-70%, 70-80%, +80%

Q: Approximately what share of your air cargo value (CAD \$) shipping is export?

A: 0-10%, 10-20%, 20-30%, 30-40%, 40-50%, 50-60%, 60-70%, 70-80%, +80%

Q: Approximately what share of your air cargo value (CAD \$) shipping is import?

A: 0-10%, 10-20%, 20-30%, 30-40%, 40-50%, 50-60%, 60-70%, 70-80%, +80%

Q: What are your most important air cargo export destinations? Please list by city and country (i.e. Frankfurt, Germany) and list all that apply.

A: Open field

Q: What are your most important air cargo import markets? Please list by city and country (i.e. Frankfurt, Germany) and list all that apply.

A: Open field

Q: What are the most important considerations when choosing an airport to ship through? Please select all that apply, up to a maximum of five.

A: Ground handling support (choice, cost), Warehousing (capacity, cost), Proximity and access to warehousing on or off airport grounds, Parking (dedicated, day-of), Truck docks and trucking staging/trailer storage, Road access (highway, regional roads), Proximity to surface connections (rail, marine ports) for secondary shipment, Proximity to Canada/US land border, # of global destinations flown, 24-hour customs clearance, Special handling facilities (perishables, live animal handling, etc.), Selection of airlines, Other

Q: Taking the previous question into consideration, does Toronto Pearson provide the requirements your company needs for air cargo shipping?

A: Sliding scale 1=no, 4=somewhat, 7=yes

If 1/no or 4/somewhat selected:

Q: What needs does your company require that are not currently met by Toronto Pearson? Please select all that apply.

A: Ground handling support (choice, cost), Warehousing (capacity, cost), Proximity and access to warehousing on or off airport grounds, Parking (dedicated, day-of), Truck docks and trucking staging/trailer storage, Road access (highway, regional roads), Proximity to surface connections (rail, marine ports) for secondary shipment, Proximity to Canada/US land border, # of global destinations flown, 24-hour customs clearance, Special handling facilities (perishables, live animal handling, etc.), Selection of airlines, Other

Q: Prior to COVID-19, had air cargo business conditions for your company improved or deteriorated over the last three years?

A: Sliding scale 1=deteriorated, 4=no change, 7=improved

If 1/deteriorated selected:

Q: If business conditions had deteriorated, what were the main reasons why?

If 7/improved selected:

Q: If business conditions had improved, what were the main reasons why?

Q: What has been the most significant impact on your business during COVID-19?

A: Financial instability, Decrease in workforce, Labour shortage, Decrease in belly hold operations, Health of employees, Access to PPE, COVID-19 procedures, Increase in labour costs, Other

**Q: What are the most pressing challenges facing your company today with respect to air shipping?
Please select all that apply, up to a maximum of three.**

A: Decrease in commercial activity/belly hold cargo, Customs clearances, Global trade volumes, Storage capabilities, New entrants, Freighters, Profiteering, Shipping rate increases, Insurance (ability to get and rates), Other

Q: Prior to COVID-19 what percentage of your air cargo needs were served by passenger belly cargo space?

A: <10%, 10-20%, 20-30%, 30-40%, 40-50%, 50-60%, 60-70%, 70-80%, 80-90%, 90-100%, N/A

Q: What share of your air cargo operations in Ontario is through Toronto Pearson?

A: 0-10%, 10-20%, 20-30%, 30-40%, 40-50%, 50-60%, 60-70%, 70-80%, 80-90%, 90-100%

Q: On average, what distances do your exports travel to reach Pearson?

A: <200km, 201-500km, 501-1000km, 1001-1500km, >1500km

Q: Approximately what share of your shipping or activity is related to transshipping? (i.e. Point A – YYZ – Point B)?

A: 0-10%, 10-20%, 20-30%, 30-40%, 40-50%, 50-60%, 60-70%, 70-80%, 80-90%, 90-100%, N/A

Q: What are the top three transshipment routes for your shipping needs? For example, trans-shipments through Toronto could be coming from Hong Kong and destined for NYC, so one route would be HKG-TOR-NYC.

A: Open field

Q: Which international markets do you believe offer the greatest opportunities for growth, supported by air shipping, in the next five years (i.e. China, France, Brazil, etc.)?

A: Open field

Q: Are there challenges/“pain points” your company has faced when operating at Toronto Pearson?

A: Yes, No

If yes:

Q: If you have experienced challenges, please provide details:

A: Open field

Q: Are there opportunities your company has not been able to capitalize on or have had to ship through another facility of mode because of a limitation or lack of service options at Toronto Pearson?

A: Yes, No

If yes:

Q: Please explain:

A: Open field

Q: What do you believe are the greatest attributes of shipping air cargo through Toronto Pearson? Please select all that apply.

A: Proximity to major highways/ground transportation links, Facilities, Fees, Policy, Ground access, Security, Other

Q: Are there innovations (processes or facilities) that your organization has seen at other airports that you believe Toronto Pearson should consider to improve air cargo operations?

A: Open field

Q: How would you rate the availability of air cargo data in Canada?

A: Sliding scale 1=poor 7=excellent

Q: How would you rate the quality of available air cargo data in Canada?

A: Sliding scale 1=poor 7=excellent

Q: How important is availability and quality of data to your business (i.e. for longer term business planning, for sales leads, for operational planning, other)?

A: Sliding scale 1=not important, 7=critical

Q: Has your company changed its emphasis on resiliency planning as a result of the pandemic?

A: Yes, No

Q: If your company has changed its emphasis on resiliency planning as a result of the pandemic, which areas of focus are you considering or actioning? Please select all that apply.

A: Pursuing diversification, Digitization and vertical integration, Merger/acquisition, Relocation, Greater integration of technology, Other

Q: The [Government of Canada's Flight Plan document](#) notes that "overall, the largest cargo operators across Canada are aligned with International Civil Aviation Organization's (ICAO) [Council Aviation Recovery Taskforce \(CART\) recommendations](#) and are ready to adapt as the situation evolves. Going forward, the use of electronic data throughout the supply chain, including handover of shipment document packages such as electronic airway bills and electronic consignment security declarations, will be encouraged throughout the cargo industry." Would your company find a tool that facilitates digital interactions between airport supply chain stakeholders useful and support a more efficient air cargo operation?

A: Yes, No, Unsure

If yes:

Q: If yes, what would be the greatest benefit to your company?

A: Open field

Q: What data sources do you rely on to support your supply chain efforts? (i.e. StatsCan HS Codes, subscriptions, WISER Trade subscription, etc.)

A: Open field

Q: Where do you get the most useful information about supply chain data?

A: Open field

Q: Has COVID-19 changed your company's or your customers' thinking about its supply chains and the movement of goods?

A: Yes, No, Undetermined

Q: What is your business' air cargo outlook for the next three years?

A: Steady growth, Status quo, Increasing financial challenges, Increasing logistical challenges, Other

Q: Has this outlook been influenced by COVID-19?

A: Yes, No, Unsure

Q: What are the most significant challenges your company faces when bringing products to market via air? Please list.

A: Open field

Q: Are there policy or regulatory changes (at the federal or provincial level) that would support more efficient and effective air cargo operations?

A: Yes, No, Unsure

Q: Is your company having conversations about changes to better prepare for future supply chain disruptions?

A: Yes, No, Unsure

Q: Are there public sector actions that would have positive impacts on your company's movement of goods via air?

A: Yes, No, Maybe

Q: Would your company be interested in a regular discussion on YYZ cargo operations/opportunities?

A: Yes, No

If yes:

Q: Who should we contact to participate?

A: Please provide your name, phone number and email address