

To: Metrolinx Board of Directors
From: Mark Childs
Chief Marketing Officer
Date: March 25, 2021
Re: Marketing Quarterly Update

Executive Summary - October to December 2020

The Marketing team continues to focus on customer safety reassurance with communication support of the 40+ health and safety measures, including campaigns to multicultural audiences and responding to changing customer needs, and the continued launch of strategic partnerships. By December, overall customer satisfaction returned to pre-COVID levels of 82%, with reported improvement to 88% GO customers feeling reassured about safety and 84% satisfied with customer communication. Preliminary February results show a similar trend with 83% overall satisfaction.

Ridership Recovery to December

Ridership continues to hold at 8.7% vs. prior year to the end of December 2020.

Customer ridership behaviour has and will continue to evolve, and we anticipate meeting our customers' needs through ridership recovery plans. Off-peak service is increasingly important, offering customers the flexibility they need in their changing schedules. It now makes up more than 50% of ridership (vs. 40% pre-COVID); bus is 30% of ridership (vs. 20% pre-COVID).

GO and UP Express safety measures continue to be of paramount importance for customers and a key driver for overall satisfaction

Ridership data, customer insights and reasons for travel are embedded into our recovery planning as the region reopens and customers choose transit to explore the region, visit friends and family, or return to work or school. Service and communication are ready to get them where they need to go, safely. Customer research conducted in December that continues through fiscal year-end will inform post-pandemic customer insights and ridership recovery plans.

Recent customer learning confirms:

- Optimism and openness to transit
- Enthusiasm about increased leisure travel
- Desire to explore our region
- Need for more frequent, flexible schedules
- Expectation for continued enhanced cleaning and COVID safety policies

Enhancing the Customer Experience

Improving the customer experience continues to be a focus for the team over the last quarter of the year, with the September launch of GO Wi-Fi Plus on GO buses and trains. Reliable LTE Wi-Fi connectivity, 'Watch, Listen & Read' entertainment content and access to customer surveys during trips provide customer benefits and feedback. The service also provides customers an opportunity to opt in for news, updates, and offers.

A strategic partnership with Purolator launched in November, with mobile trucks and kiosks available at select GO stations for our customers' courier needs. This initiative supports our 'Find your GO time' brand promise.

Following the release of an Expression of Interest, an online store that sells GO Transit branded merchandise including apparel, accessories, décor and toys, as well as seasonal products, will launch soon.

As ridership returns, more station-level customer amenities and partnerships will be rolled out:

- Personal protection equipment available at more stations
- The reopening of our coffee partners' retail spaces with Balzacs' at UP Express Union Station and Fleets Coffee trucks at select GO stations, as well as new food and beverage options at the new Union Station Bus Terminal"

Respectfully submitted,

Mark Childs
Chief Marketing Officer