

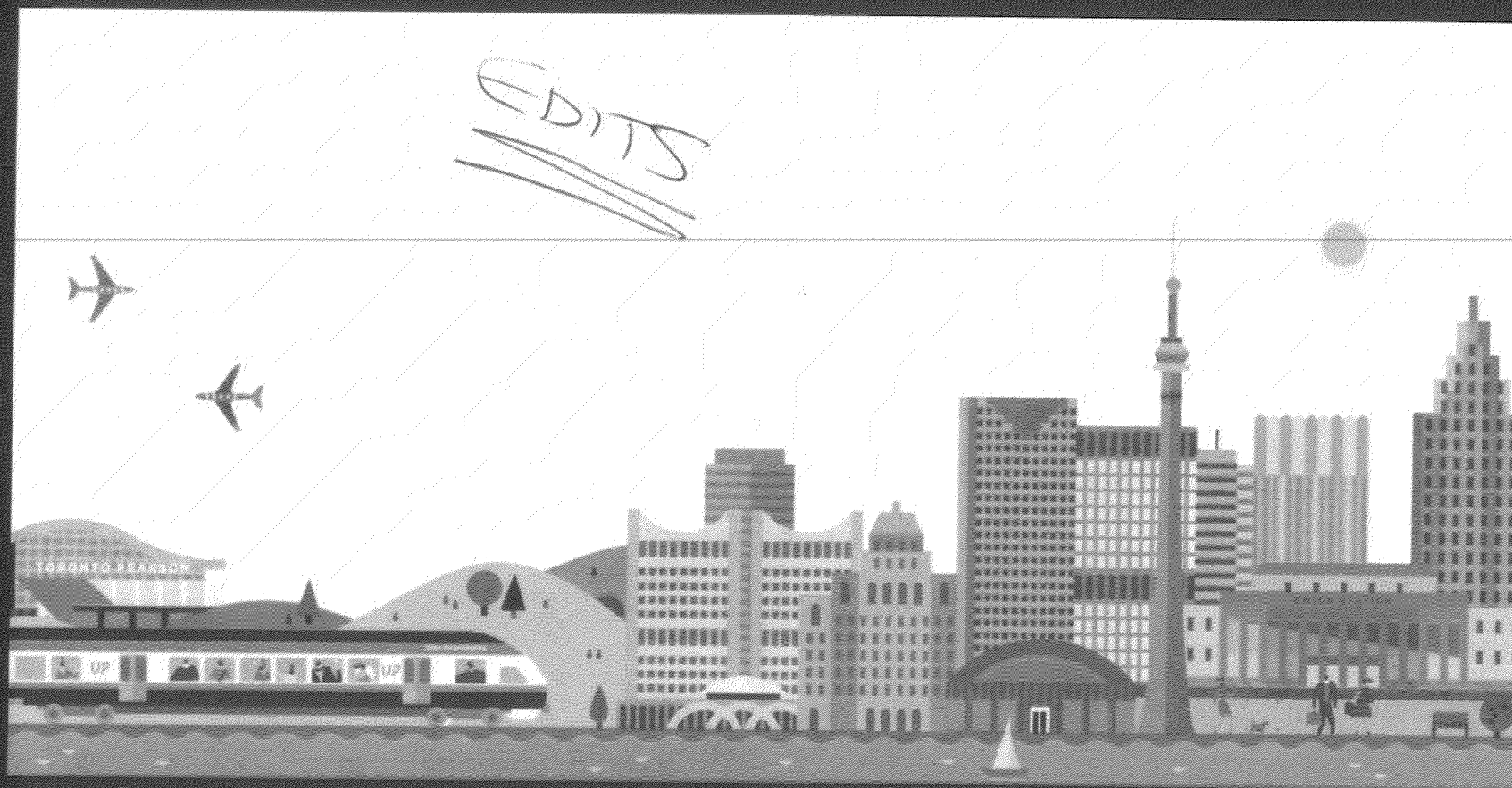


A Division of METROLINX

UP Express 2013 Ridership Forecast Update

****DRAFT****

August 21, 2013



Executive Summary

- Results of the 2013 forecast are largely consistent with previous forecasts, ridership variances are between -1.08% to +0.24% depending on forecast year compared to the 2011 SDG study

Exclusion per Committee Direction

- As part of this 2013 forecast, key assumptions were updated:

Exclusion per Committee Direction

- Air traffic forecasts were revised to account for updated passenger forecasts at Pearson Airport and associated impacts of Billy Bishop Airport
- Changes to the costs of competing modes were considered: Airport Express Bus fare increase from \$23.95 to \$26.95, and more recently to \$27.95 in July
- Ridership ramp-up of (65%/80%/90%) over the first 3 years remains unchanged

Forecasts	Base Ridership Forecast (Opening Fiscal Year)	Opening Fiscal Year Airport Traffic ¹	Opening Fiscal Year Market Share	Base Ridership Forecast (Maturity)	2018 Airport Traffic ¹	2018 Market Share
2011	1.35M (2015) Apr-Dec	20.1M Apr-Dec	6.7%	3.08M (2020) 2.97M (2018)	29.9M	10.3%
2013	1.0M (2015) Apr-Dec	19.9M Apr-Dec	5.4%	2.46M (2020) 2.35M (2018)	29.7M	8.3%

¹ Excludes connecting passengers

Exclusion per Committee Direction

Exclusion per Committee Direction

- UP Express has re-baselined its central ridership forecast at 2.46M in 2020 (see Appendix).

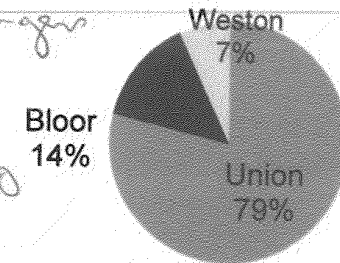
Exclusion per Committee Direction

Ridership Summary – By Station, Trip Purpose.

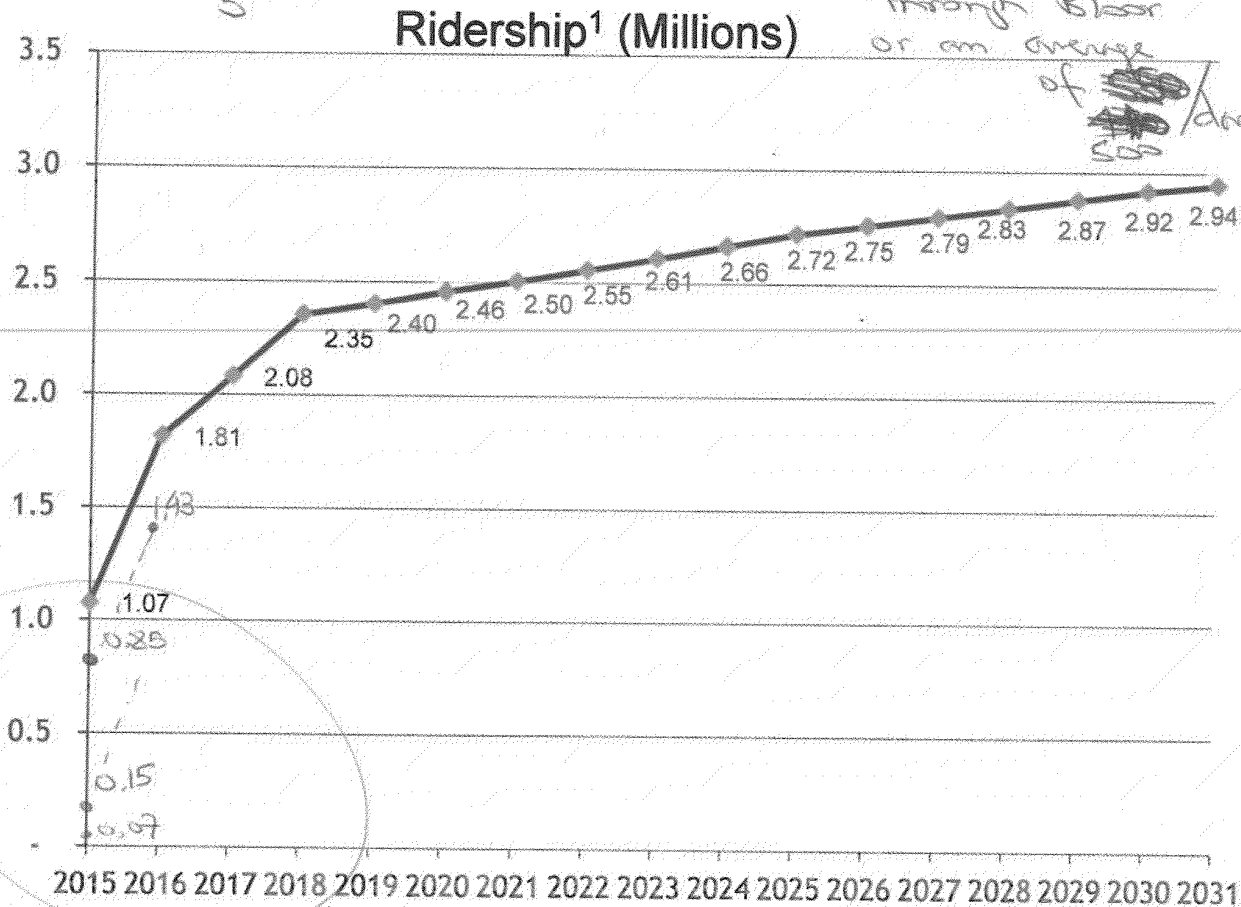
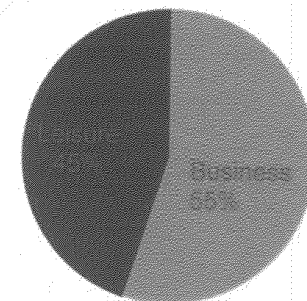
- The majority of UP Express riders will access our service at Union Station (79%)

- In 2018 we would expect at least 150,000 passengers through Bloor or an average of 410/day

Estimated Ridership by Station¹



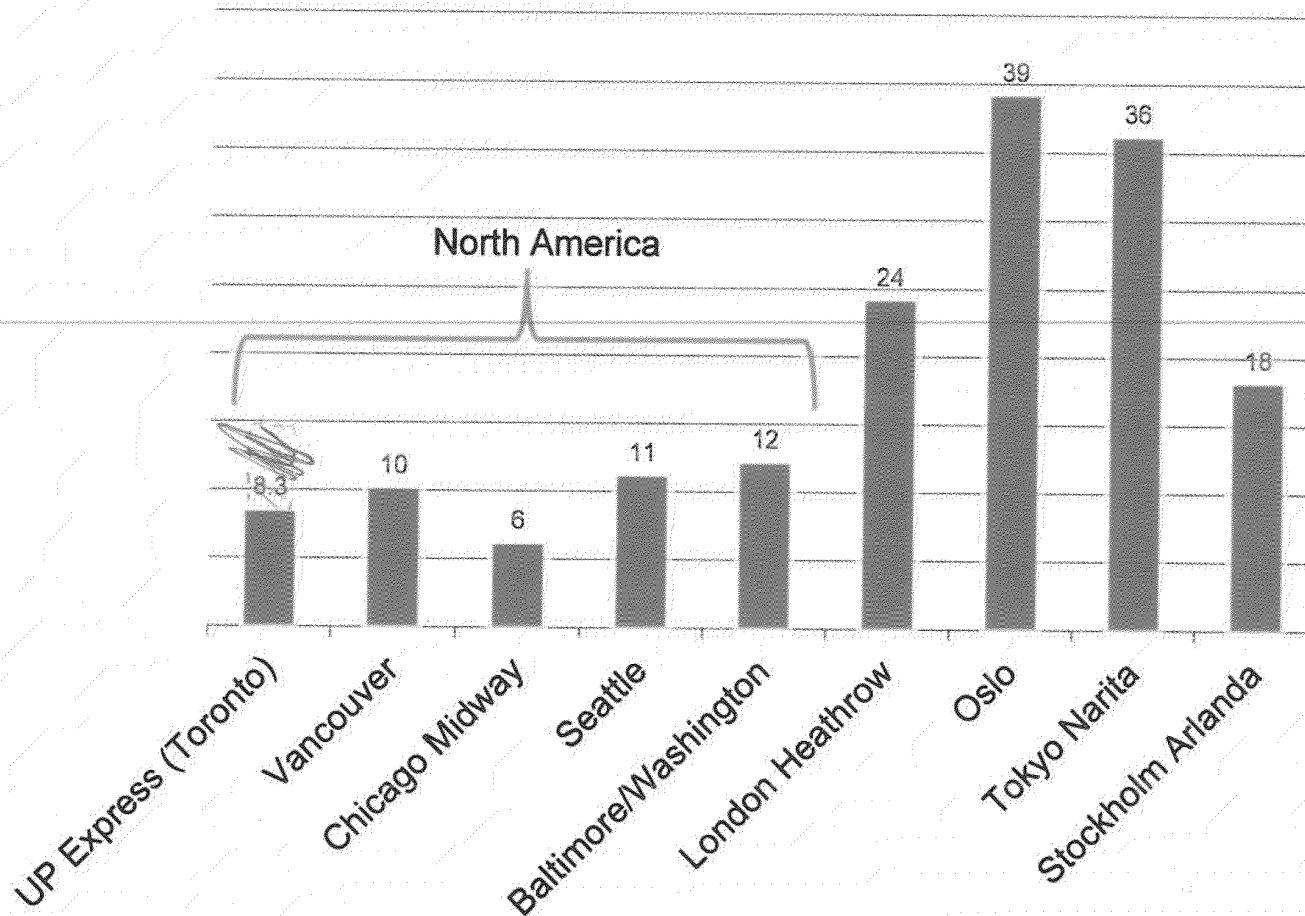
UP Passenger Trip Purpose¹



¹ Steer Davies Gleave, 2013

UP Express market share is aligned with other North American airports

Rail Market Share (%) at North American and Global Airports¹



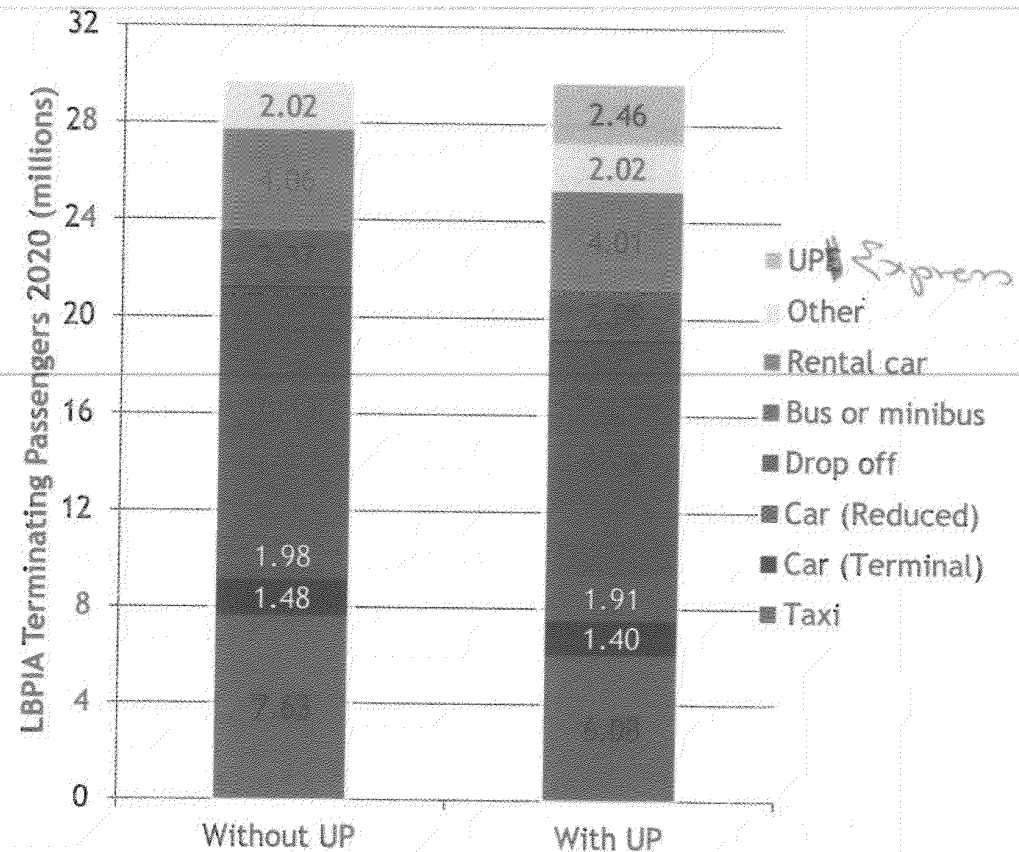
Other Key Insights¹

- Most (63%) of the UP Express demand is abstracted from the taxi mode; 12% from Airport Express Bus and 25% from car travel (parking, drop-off)
- UP Express will capture 60% of the in-scope demand in the vicinity of Union Station; and 47% in the vicinity of Bloor Station
- 8.3% is well within range of other North American systems

¹ Steer Davies Gleave, 2013

Issue: Impact to other modes of travel

- As a result of UP Express, the largest impact to existing travel modes to Pearson will be to Taxis
- The forecast suggests that by 2020, the market share of total airport ground access will shift as follows:
 - Taxis will reduce from 25.7% to 20.5%
 - Drop-Offs from 34.1% to 32.8%
 - Bus from 8% to 7%
 - Parking at the airport from 11.7% to 11.2%



Next Steps

Audit Working Papers

- Updating public communications as a result of 2013 baselined forecasts
- Working with PPI, develop procurement for 2014 forecast

Exclusion per Committee Direction

Exclusion per Committee Direction

Exclusion per Committee Direction

Issue: Cars of the Road

- As part of the 2013 forecast, SDG examined “cars off the road” which has been a core component of our public messaging
 - Currently, Metrolinx notes *UP Express will remove 1.2M cars off the road in its first year of operation*
- SDG found in the opening year, UP Express will remove at least 870K cars off the road (Apr-Dec 2015)
- Public messaging should be updated to state:
 - *UP Express will remove up to 1.2M cars off the road in its first full year of operation*

12 months

		2015	2018	2020
Car Trips Removed from Road (Millions)	Taxi	0.66	1.42	1.47
	Car (Terminal)	0.03	0.07	0.07
	Car (Reduced)	0.03	0.06	0.07
	Drop Off	0.13	0.31	0.33
	Rental Car	0.02	0.05	0.05
	Total	0.87	1.90	1.98