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From: Richards, Jim
Sent: Sun 5/5/2013 10:25:38 AM
Subject: Initial Union Pearson Express Ridership Update Forecasts
Initial Draft Forecast Charts Sent 050513.pptx

Daniel

Further to our conversation last week in the margins of the meeting on Tuesday, please see attached the initial numbers from the update to the Union Pearson Express ridership updates.

Air Traffic Forecasts – Slides 2 and 3

- For air passenger demand in the Toronto area (covering Pearson, Hamilton and Billy Bishop airports), the forecast has gone up for domestic and trans-border flights due to the rise in actual passengers in 2011 and 2012. The GDP forecast for Canada and US is also more optimistic than back in 2011.
- For Pearson airport, the same applies for trans-border flights. However, domestic forecast is lower than in 2011, due to the rapid rise in flights from Billy Bishop Airport. We have assumed that this airport will reach a capacity of 3.5million passengers a year in 2022 and thereafter will continue operating at full capacity.

Highway Forecasts

· We have considered changing the highway times in the model. The current highway times in the model were derived from a combination of surveys and a website that calculated drive times at different times of the day.

· We investigated whether the drive times should be updated, considering websites that claim to provide appropriate estimates but none of these appeared to corroborate with known experiences of undertaking airport-downtown trips.

· MTO data was sourced from Metrolinx, and whilst data existed for parts of the highway network, it did not provide the comprehensive coverage that we required.

- On balance, we have decided to retain the highway times that were in the original model, and feel that these represent a realistic estimate of journey times by time of day

Updating Assumptions

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- We have reviewed and updated where appropriate a number of the assumptions including the costs of the competing modes. Most have fallen in real terms (stayed constant in nominal terms), therefore making them more attractive relative to the UPE.
- We have reviewed the population and employment data, and in discussion with Metrolinx have used forecasts that are consistent with those adopted in the GGHM (and therefore with other current work streams)
- We have documented the changes to assumptions, and can supply these once “tidied up” to demonstrate the changes that we have proposed

Exclusion per Committee Direction

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Hope these preliminary results are helpful, and it would be good to have a brief discussion before we proceed further.

Kind regards

Jim

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