

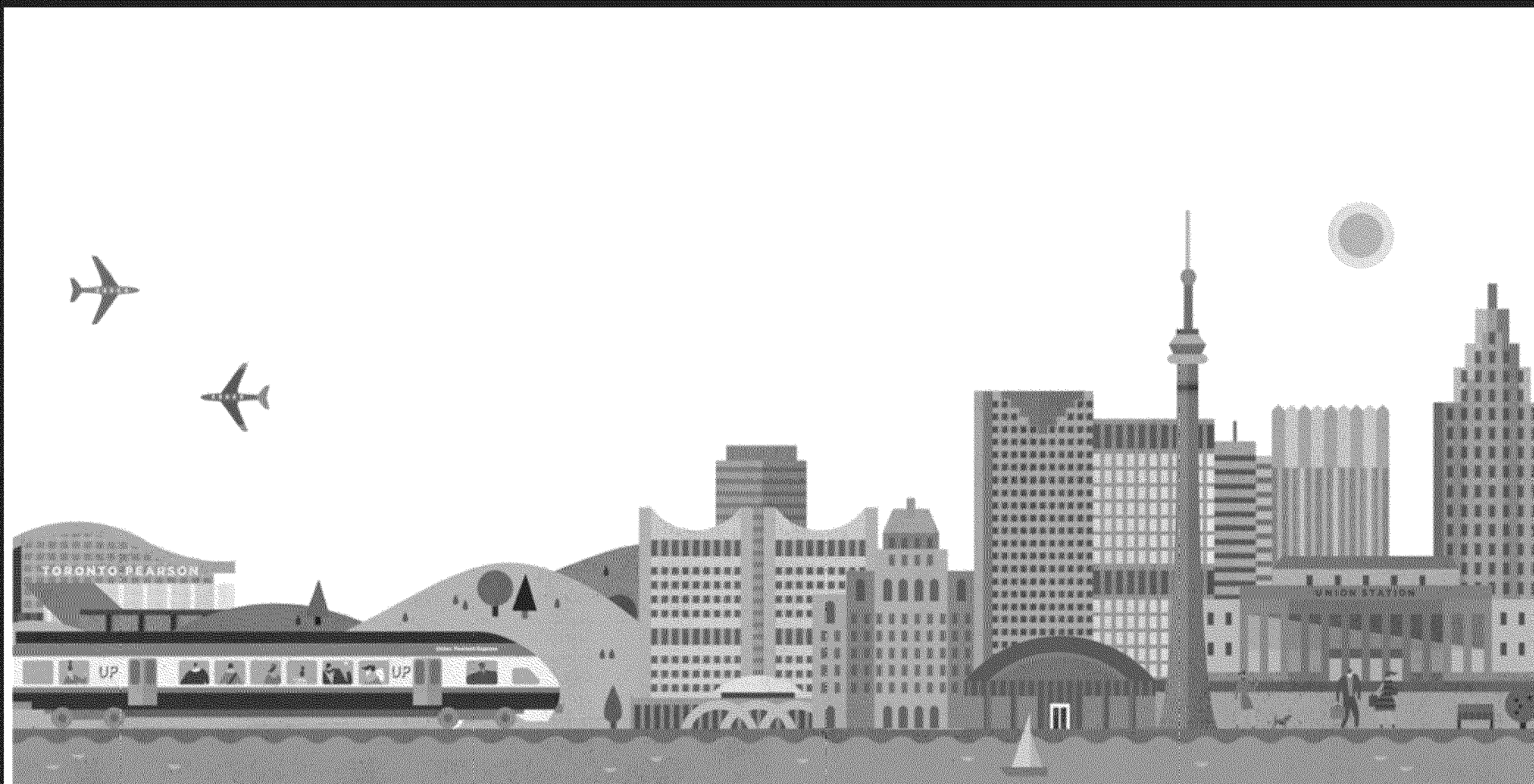


A Division of METROLINX

UP Express 2013 Ridership Forecast Update

DRAFT

August 21, 2013



Executive Summary

- Results of the 2013 forecast are largely consistent with previous forecasts; ridership is up slightly compared to the 2011 SDG study
- 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 Year)	Opening Year Airport Traffic ²	Opening Year Market Share	Base Ridership Forecast (Maturity)	Maturity Year Airport Traffic ²	Maturity Year Market Share
2011 SDG ¹	1.35M (2015) Apr-Dec	20.1M Apr-Dec	6.7%	3.08M (2020) 2.97M (2018)	29.9M	10.3%
2013 SDG ¹	1.07M (2015) Apr-Dec	19.9M Apr-Dec	5.4%	2.46M (2020) 2.35M (2018)	29.7M	8.3%

¹ Steer Davies Gleave

² Excludes connecting passengers

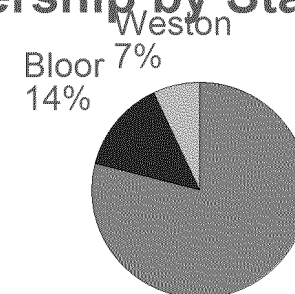
- **Exclusion per Committee Direction**
- UP Express has re-baselined its central ridership forecast at 2.46M in 2020

Exclusion per Committee Direction

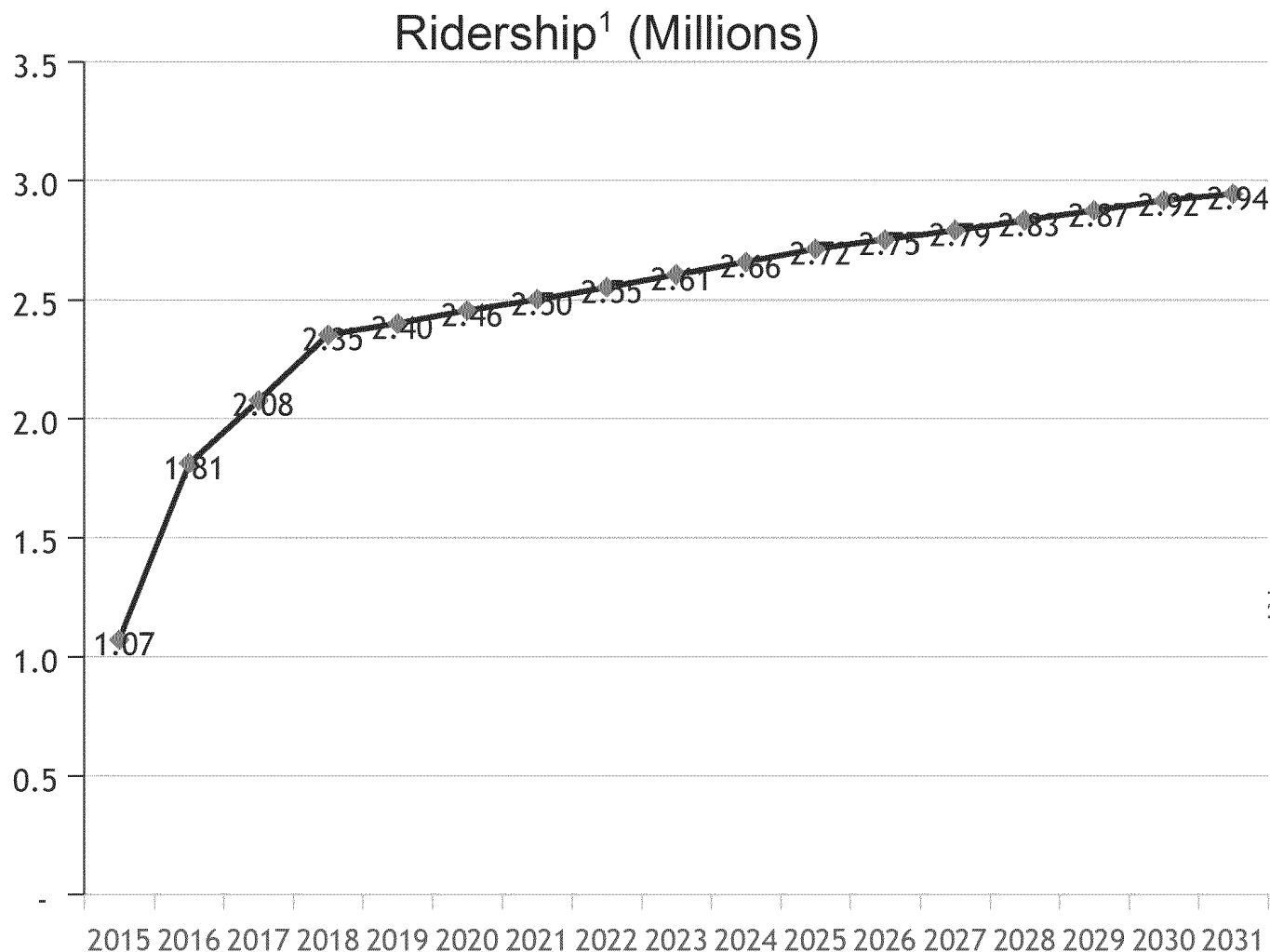
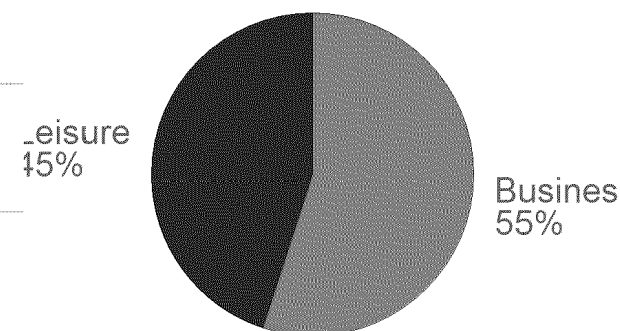
Ridership Summary – By Station, Trip Purpose.

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

Estimated Ridership by Station¹



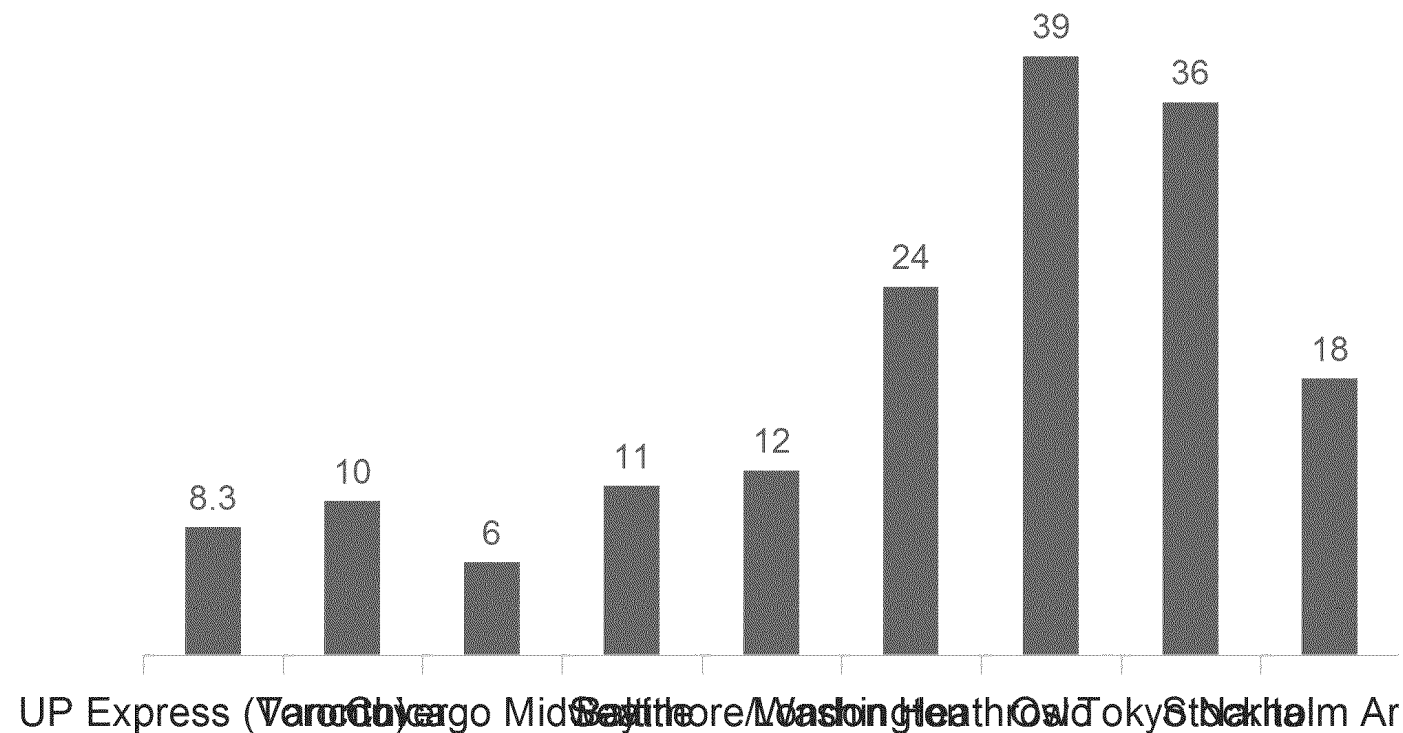
UP Passenger Trip Purpose¹



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

¹ Steer Davies Gleave, 2013

Exclusion per Committee Direction

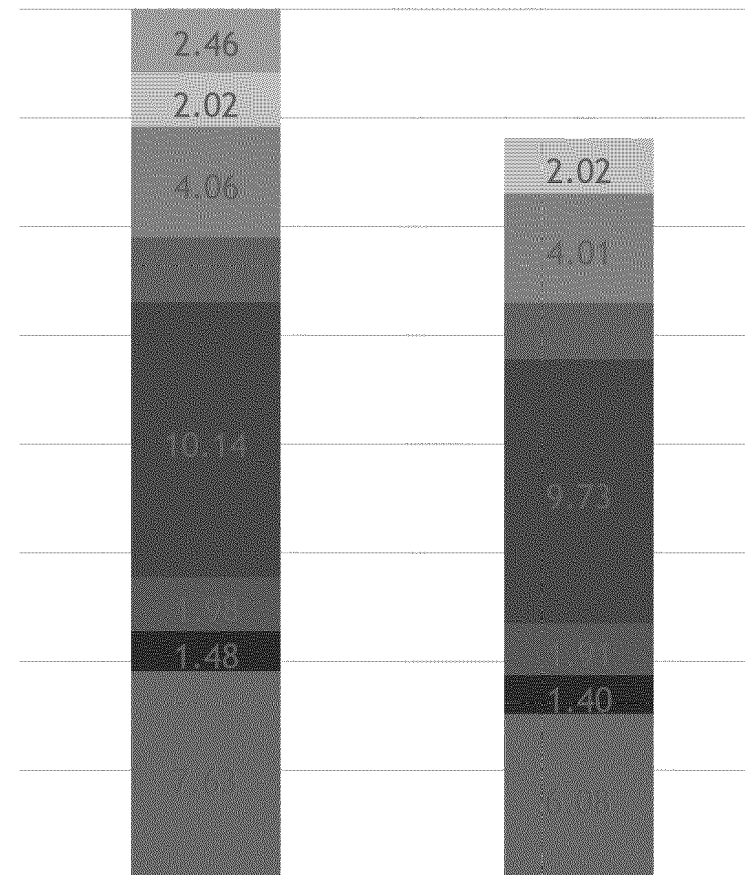
Issue: Cars of the Road

- 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 870K cars off the road (Apr-Dec)
- Public messaging should be updated to state:
 - *UP Express will remove up to 1.2M cars off the road in its first year of operation*

		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

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
- Continue working on BCA and Airport Area Transportation Study to the end of 2013