

To: Kathy Haley[Kathy.Haley@upexpress.com]
Cc: Philip Safos[Philip.Safos@metrolinx.com]
From: Stephan Mehr
Sent: Thur 5/9/2013 8:46:20 PM
Subject: FW: Initial Union Pearson Express Ridership Update Forecasts
[Initial Draft Forecast Charts Sent 050513.pptx](#)

Hi Kathy:

As per my update at ACT today, see the attached preliminary notes and graphs provided by SDG.

I will be speaking to Jim next week and will be asking for a final, more detailed report from SDG as a deliverable.

Regards

Stef

From: Richards, Jim [mailto:Jim.Richards@sdgworld.net]
Sent: Sunday, May 05, 2013 6:26 AM
To: Daniel Haufschild
Cc: Stephan Mehr; Philip Safos; Stephan Mehr; Berman, Sarah; Tang, Katie
Subject: Initial Union Pearson Express Ridership Update Forecasts

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

Exclusion per Committee Direction

 Most have fallen in real terms (stayed constant in nominal terms), therefore making them more attractive relative to the UPE.
- We have reviewed th 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

Results

Exclusion per Committee Direction

Headline is that

Exclusion per Committee Direction

Exclusion per Committee Direction

Indeed, air traffic would be higher still were it not for the Billy Bishop assumption of strong growth through the coming years.

- Overall ridership forecast has gone up slightly: in 2020, one way ridership has gone from 3.08million to 3.09million.
- Taxi: capture rate fallen from 39% to 38.7% due to almost constant nominal fares from 2011 to 2013.
- Car (terminal): capture rate gone from 21.7% to 22.4%
- Car (reduced): fallen from 18.2% to 16.4%
- Drop off: 0.1% fall in capture rate
- Express bus: 70.1% to 76.5% due to a rise in fares from \$23.95 in 2011 to \$26.95 in 2013
- Rental car: no change

Results

Exclusion per Committee Direction

Exclusion per Committee Direction

Exclusion per Committee Direction

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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