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

-

· We have reviewed and updated where appropriate a number of the assumptions Exclusion per Committee Direction 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 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

Exclusion per Committee Direction

Exclusion per Committee Direction

· 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

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

Jim Richards
Associate Director

Steer Davies Gleave
28-32 Upper Ground, London SE1 9PD
direct +44 20 7910 5574
mobile 07827 082995
switchboard +44 20 7910 5000
www.steerdaviesgleave.com

national transport awards
2012 Winner
Transport Consultant of the Year

INFRASTRUCTURE JOURNAL AWARDS
2012 Winner
Technical Transport Adviser of the Year

2012 Winner Transport Consultant of the Year, 2012 Winner Technical Transport Adviser of the Year

This message is sent in confidence for the addressee only. It may contain legally privileged information and/or information that is commercially confidential. The contents are not to be disclosed to anyone other than the addressee. Unauthorised recipients are requested to preserve this confidentiality and to advise the sender immediately of any error in transmission. When addressed to clients, any information contained in this email is subject to the terms and conditions in the governing client contract. Steer Davies & Gleave Limited, trading as Steer Davies Gleave. Registered in England, number 1883830. Registered office: 28-32 Upper Ground, London SE1 9PD.