

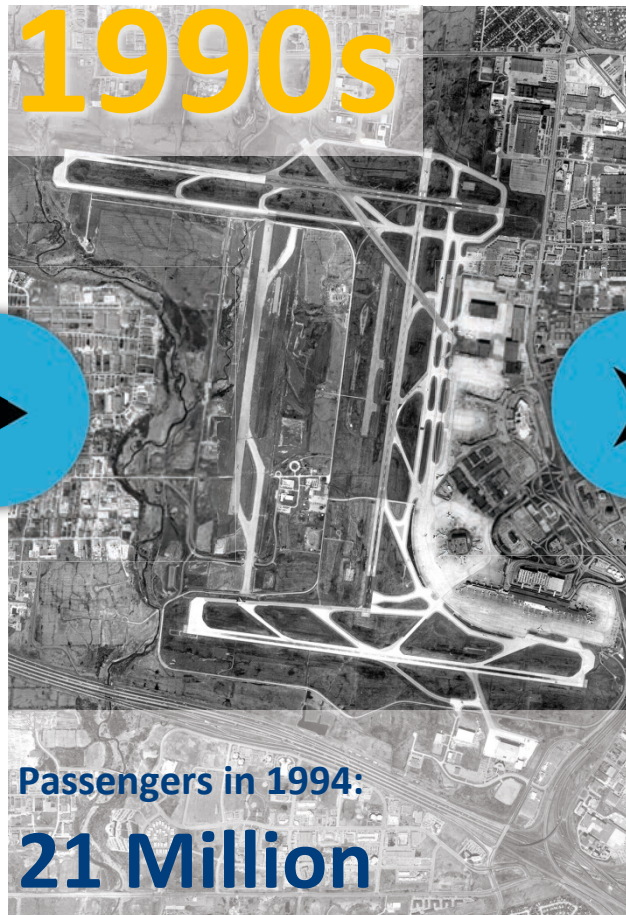
The Case for Growth:

Sustaining Growth & Delivering Economic Benefits to Southern Ontario Through Aviation

Howard Eng, President & CEO, Greater Toronto Airports Authority
May 4, 2015

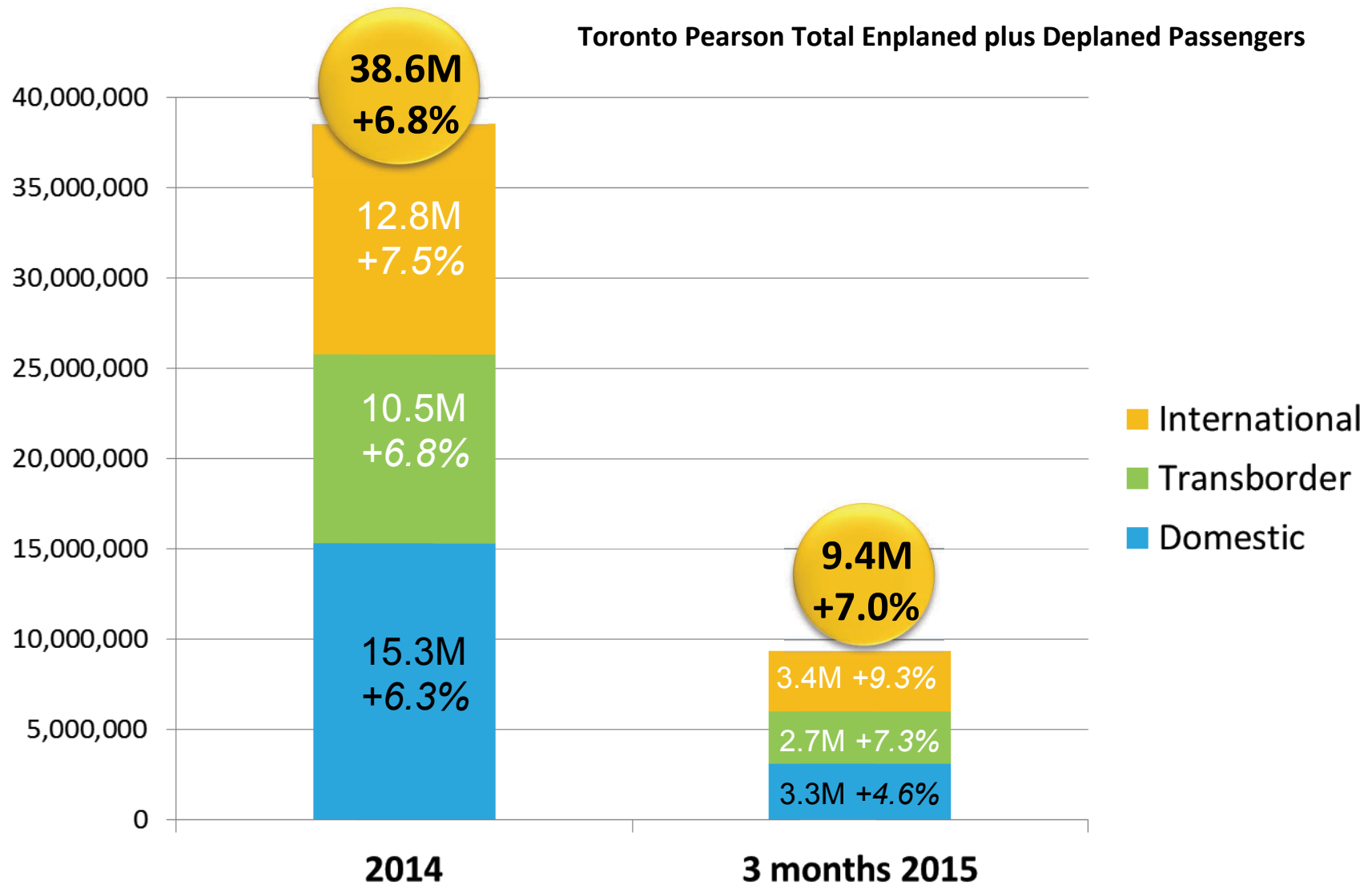


Toronto Pearson's Flight Path

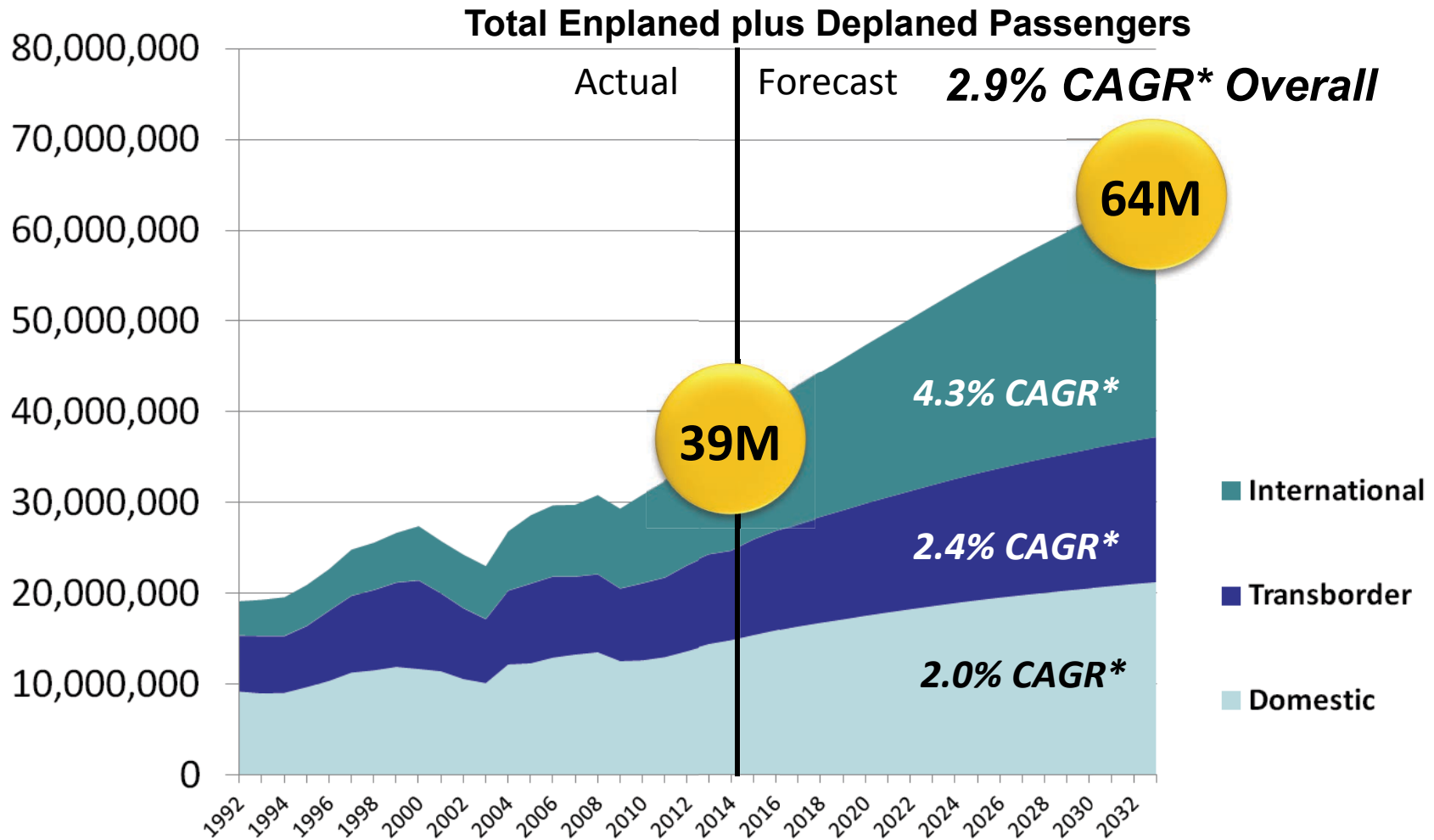


**North America's:
13th busiest airport for Total Passengers
2nd largest airport for International Passengers**

Growth in 2014 Continuing in 2015



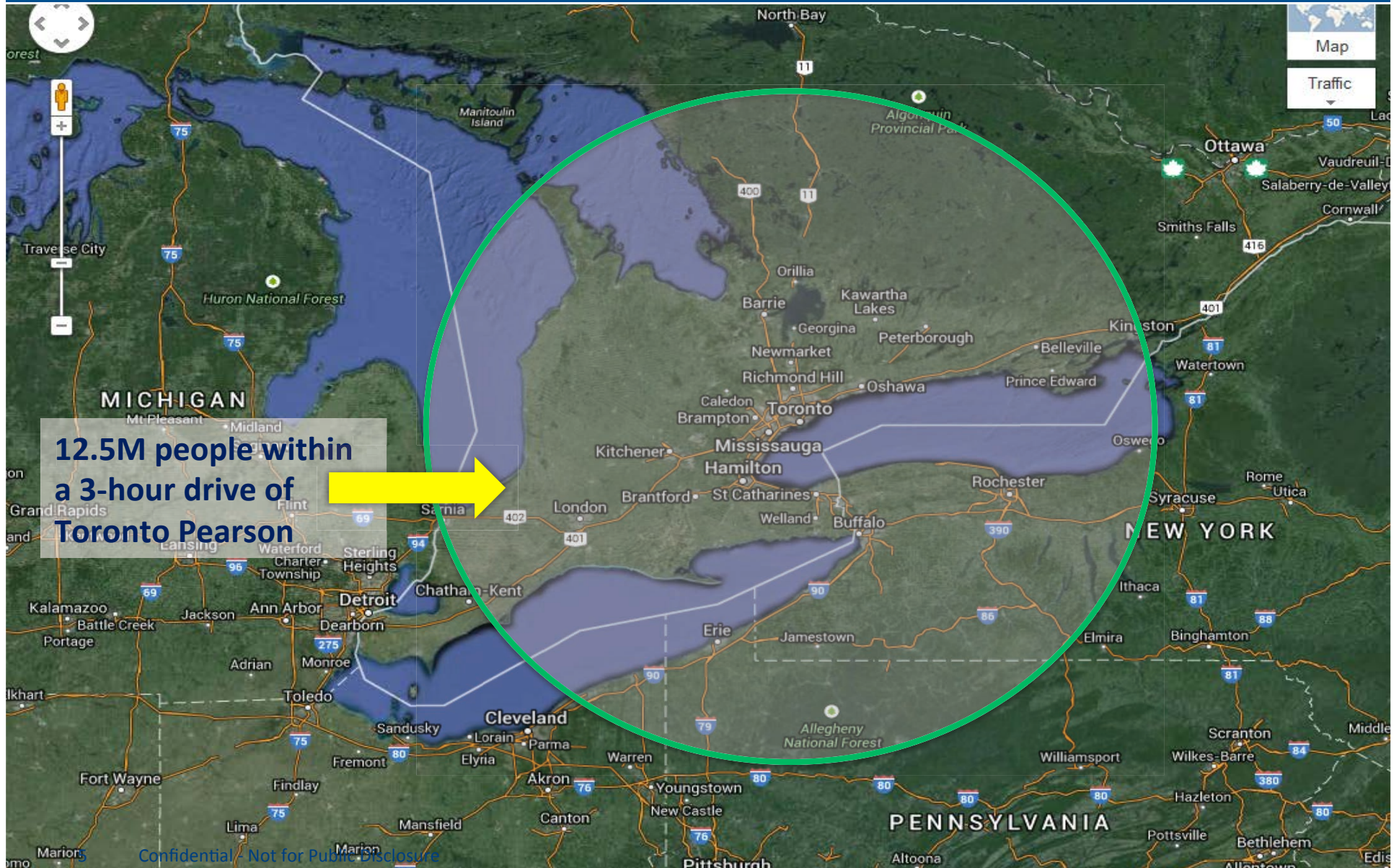
Growing Passenger Traffic



* CAGR = Compound Annual Growth Rate over 20-years

Toronto Pearson's Surface Catchment Area

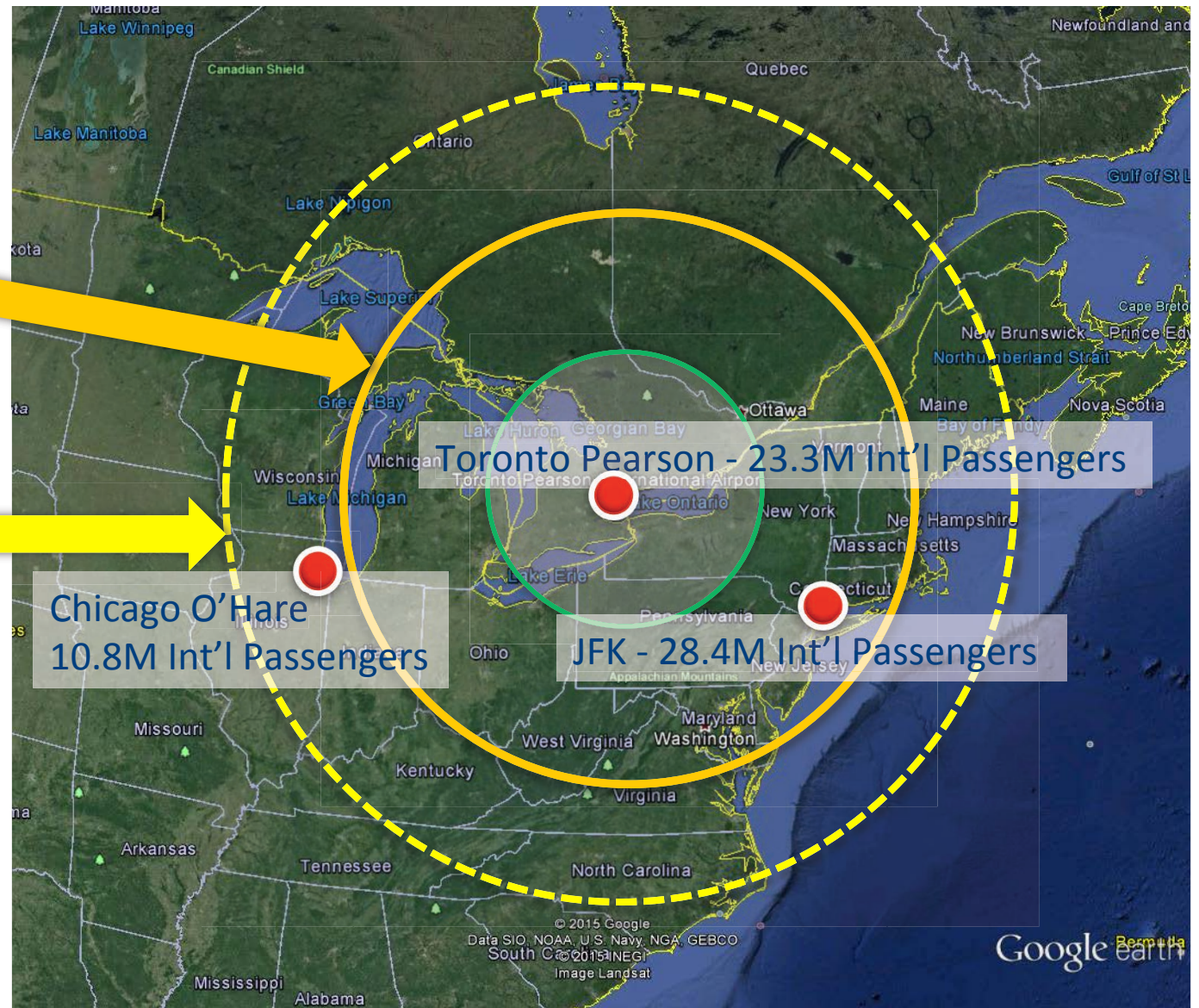
3-hour Drive Time



Toronto Pearson's Catchment Area within a 90-minute Flight

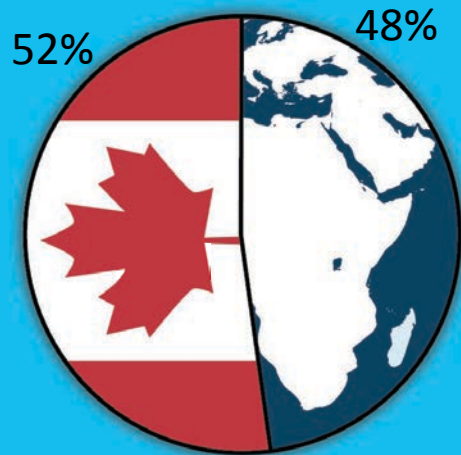
150M people within a 90-minute flight of Toronto Pearson

Additional 50M people (total of 200M) within a 2-hour flight of Toronto Pearson



Toronto Pearson Passenger Traffic

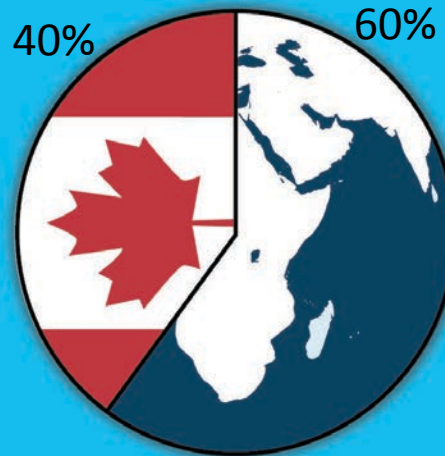
1985



Total - 15.7M

Connecting and O&D Not available

2014

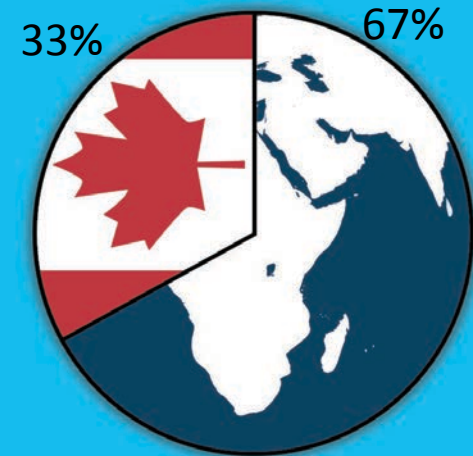


Total - 39M

30% Connecting

70% O&D

2033


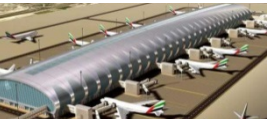







Total - 64M

30% Connecting

70% O&D

Toronto Pearson - an Increasingly Important Global Hub Airport

Airport		Passenger traffic, 2014, Millions	Total Traffic	City population (M), 2014	
London Heathrow		68.1	73.4	8.6	International
Dubai International		69.1	70.5	2.3	Domestic
Charles de Gaulle		58.6	63.8	2.3	
Singapore Changi		54.1	54.1	5.5	
John F. Kennedy International		28.5	53.2	8.4	
Toronto Pearson International		23.3	38.6	2.9	
Chicago O'Hare International		10.8	70.1	2.7	

Source: ACI statistics.

Economic Benefits of Global Hub Airports

- Increases employment
- Increases FDI
- Attracts new business activity

Boosts Economic Development

Increases Air Travel Demand

- Increases travel to/from business centres
- Increases visitors to events/attractions
- Possibly increases population

- Improves investments
 - Ground connectivity to other centres
 - Attracts more development investments

Improves Investments in the Region

Increases Revenue

- Revenue from traffic increases (non-aeronautical and aeronautical)

Toronto Pearson's Economic Impact

Today

\$35.4B

5.6% OF THE ONTARIO GDP

277,000

JOBS FACILITATED ACROSS ONTARIO

2030

\$62.1B

6.6% OF THE ONTARIO GDP

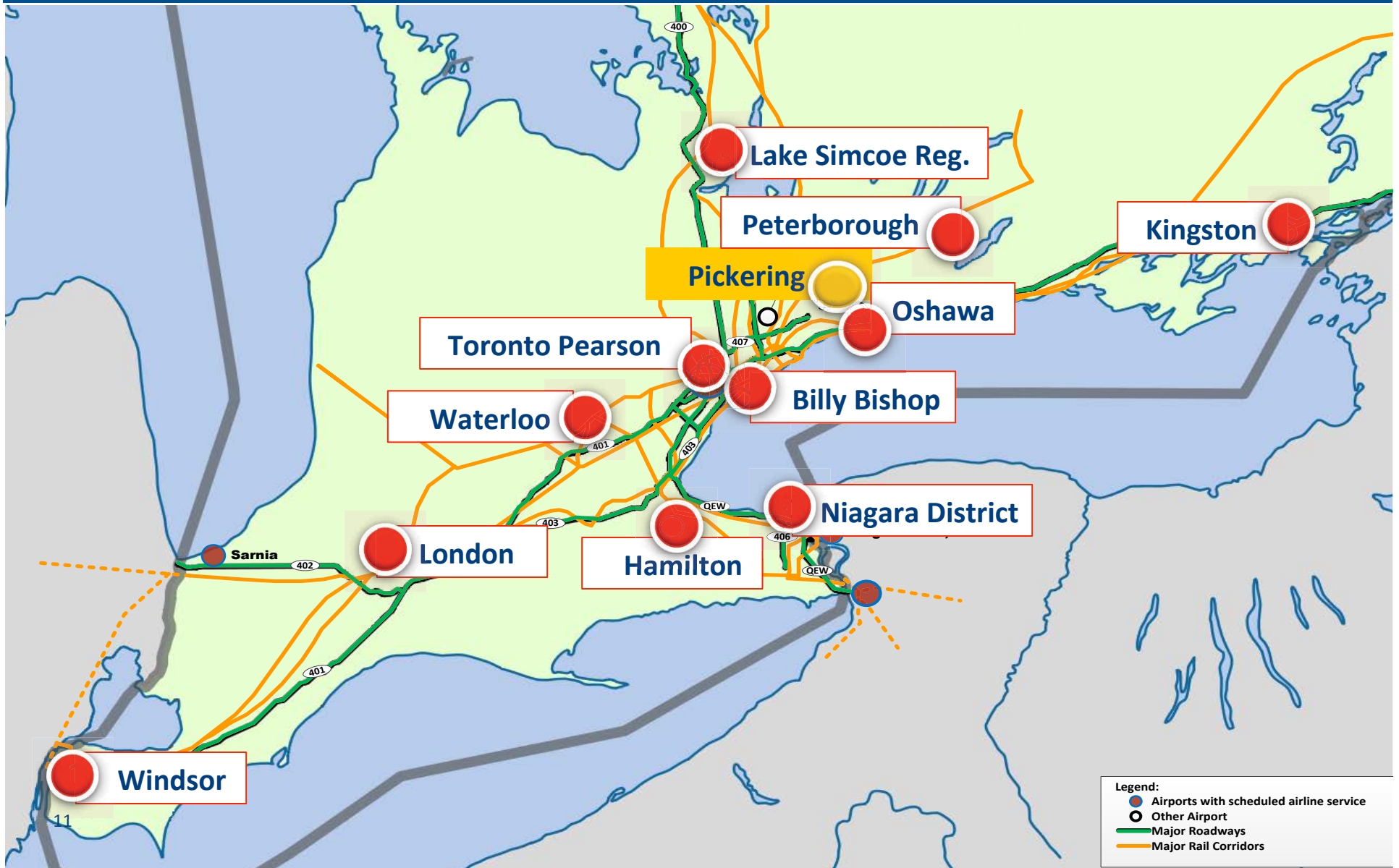
478,000

JOBS FACILITATED ACROSS ONTARIO



South-Central Ontario Regional Airports System

Airports and Major Ground Transportation Corridors



Possible Directions for Managing Growth

	Description	Implications
1 Build a single, large airport	<ul style="list-style-type: none">▪ Large hub airport to handle all current and future demand (hub and O&D traffic)	<ul style="list-style-type: none">▪ Move Toronto Pearson to larger, vacant plot of land▪ Develop ground transportation options to connect new remote site to regional economic centres
2 Develop a robust regional airport system	<ul style="list-style-type: none">▪ Network of regional airports throughout greater Toronto▪ Could be dual-hubs or separate O&D-focused airport	<ul style="list-style-type: none">▪ Optimize existing infrastructure; each airport plays a role▪ Still requires connectivity through ground transportation
3 Status quo	<ul style="list-style-type: none">▪ Pearson reaches capacity; no additional capacity is built at Pearson or other new/existing airports	<ul style="list-style-type: none">▪ No ability to manage growth▪ Become impediment to economic activity

Call to Action: Planning for the Future

- **How can the planning community and airport community work more collaboratively together?**
- **Where do our mutual interests align?**
- **How can planners leverage the inherent connectivity provided by airports to inform infrastructure investment decisions?**

Growth is coming. The time to plan for it is now.

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