

# Regional Airports Initiative

Update to the Toronto Pearson Community  
Environment & Noise Advisory Committee



# Introduction

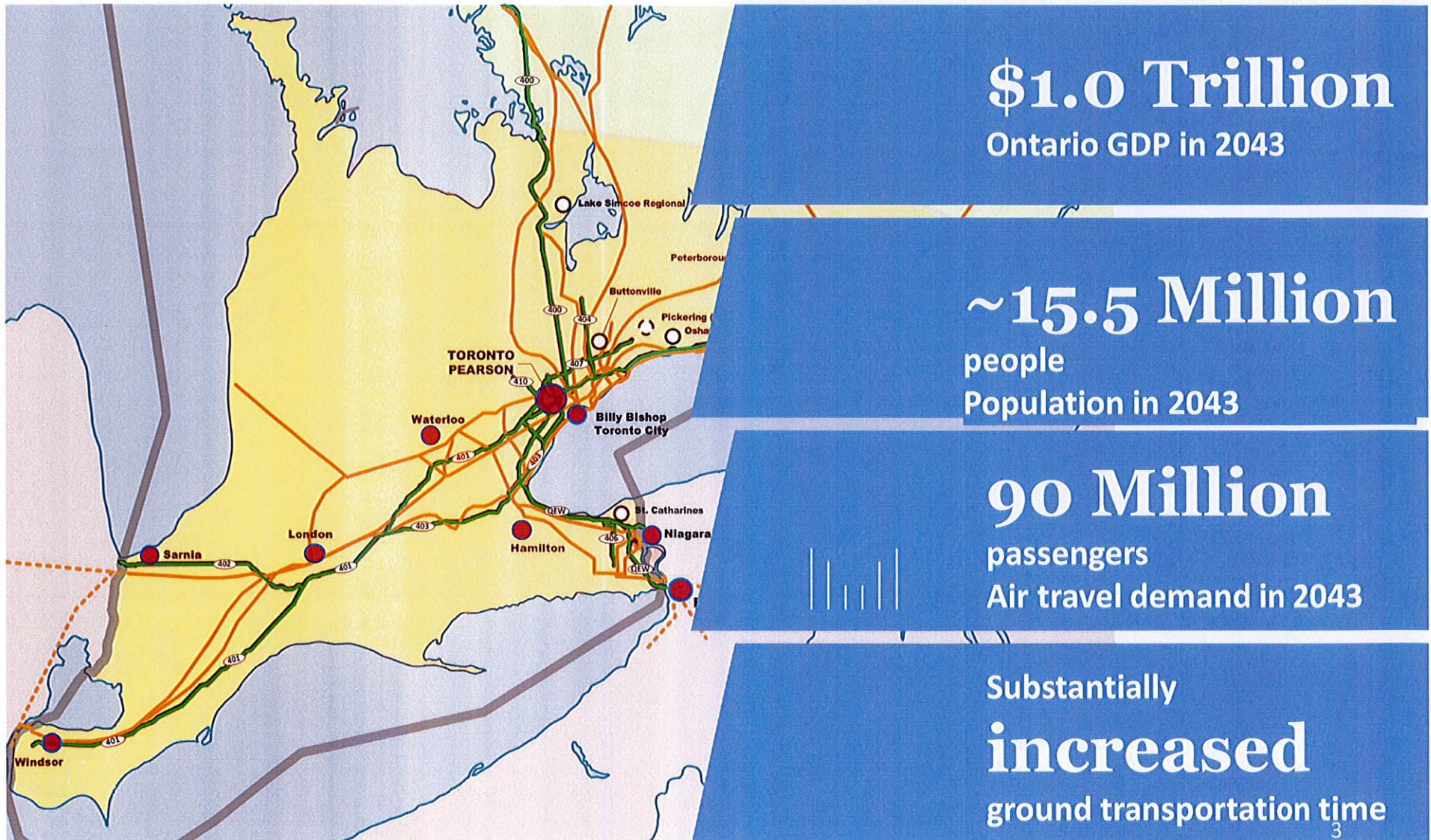
The Greater Toronto Airports Authority (GTAA) began a conversation with 10 regional airports, and other key stakeholders about the upcoming growth the Southern Ontario region will experience.

## Stakeholders

- |  |  |
|--|--|
| ■ Billy Bishop Toronto City Airport            | ■ Peterborough Airport                     |
| ■ John C. Munro Hamilton International Airport | ■ Region of Waterloo International Airport |
| ■ Kingston/Norman Rogers Airport               | ■ Windsor International Airport            |
| ■ Lake Simcoe Regional Airport                 | ■ Transport Canada                         |
| ■ London International Airport                 | ■ Province of Ontario                      |
| ■ Niagara District Airport                     | ■ Municipal governments                    |
| ■ Oshawa Executive Airport                     | ■ Airlines                                 |



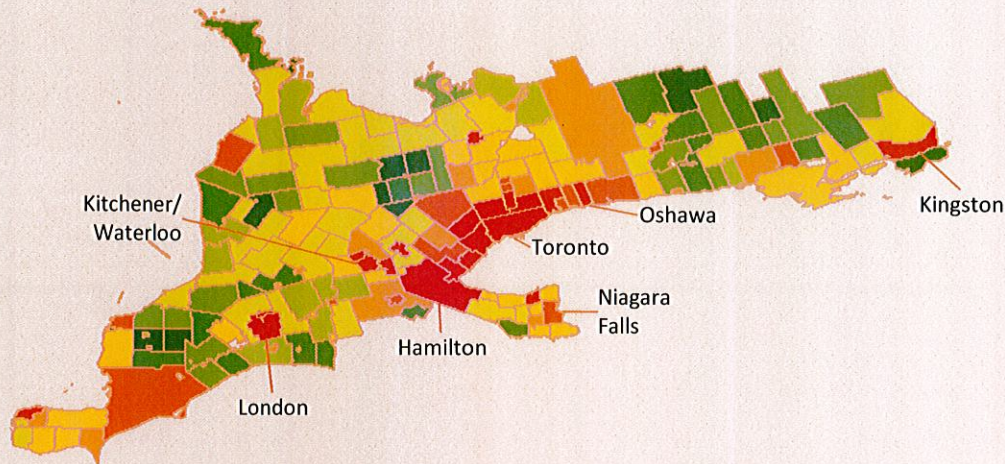
# Why this is important: More growth coming





# Ontario GDP will double over next 30 years and growth will be concentrated in the GTA and Golden Horseshoe Area

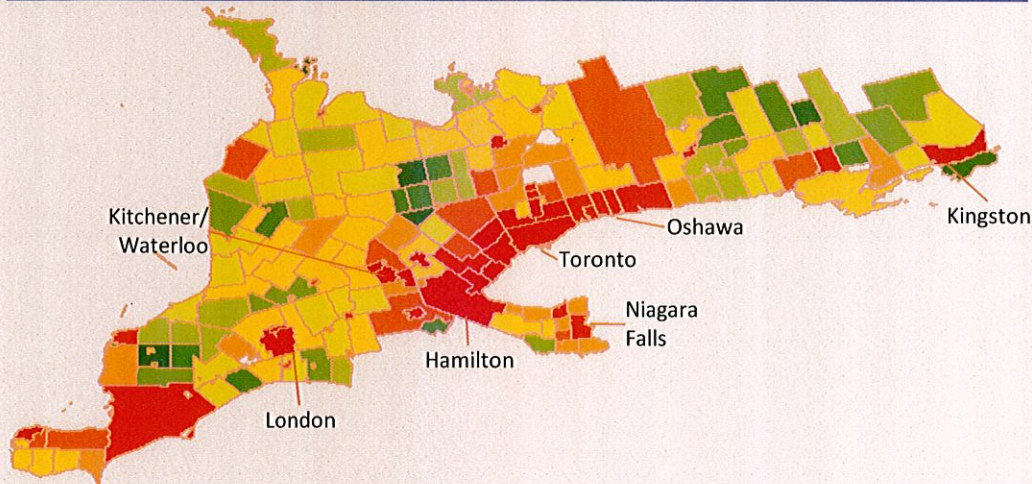
Southern Ontario Real GDP by CSD, 2014



Real GDP, \$ Billions

≤0.05	0.5 - 1
0.05 - 1	1 - 2
0.1 - 0.15	2 - 4
0.15 - 0.25	4 - 10
0.25 - 0.5	>10

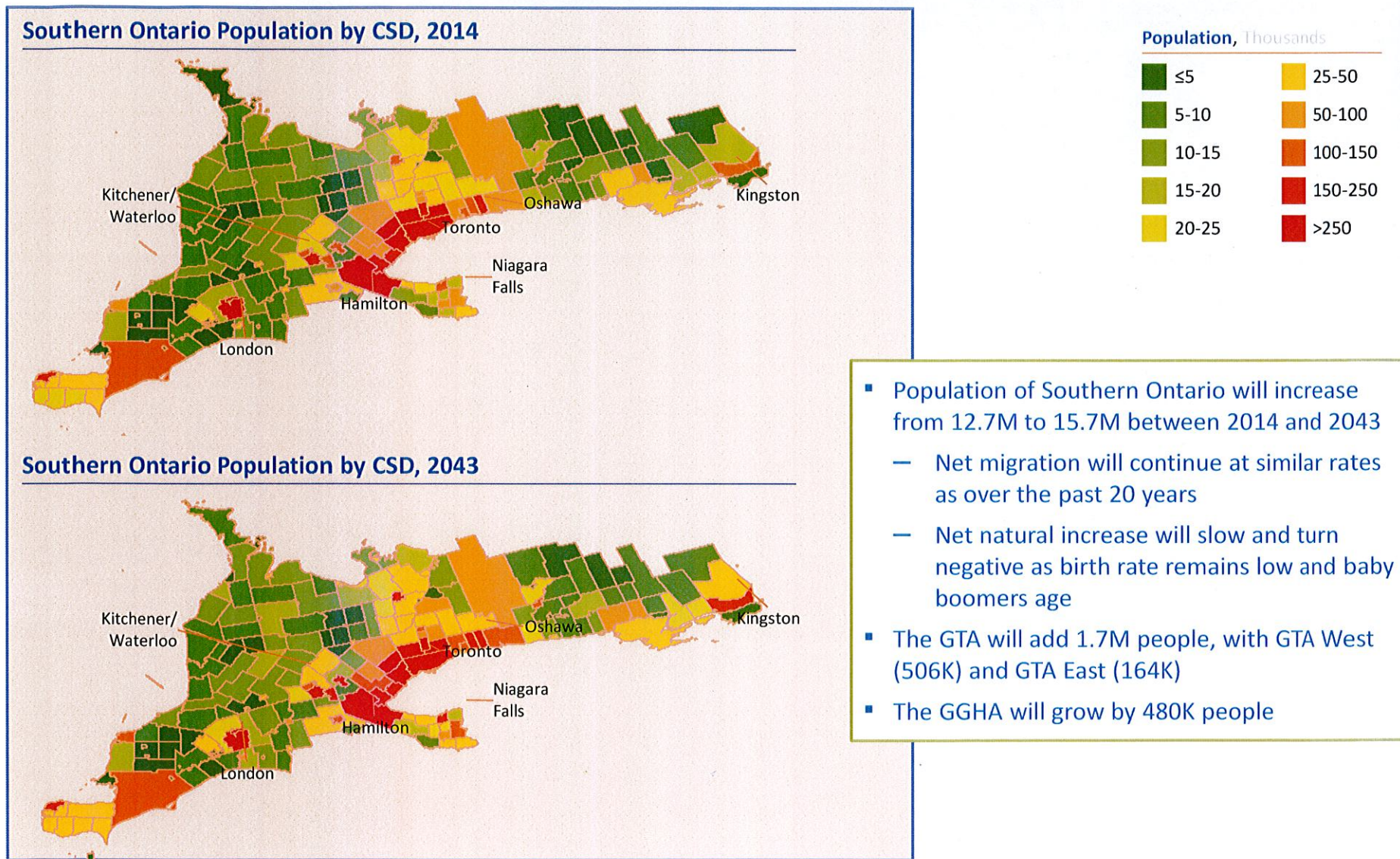
Southern Ontario Real GDP by CSD, 2043



- Ontario's GDP Growth: \$600 billion to \$1.1 trillion
  - Comparable to Pennsylvania and Ohio)
  - Similar to New York state today
- Driven by increased population, productivity gains and continued US demand for exports
- Southern Ontario will remain ~80% of total
- Majority of growth will be in GTA and Golden Horseshoe Area (GHA):
  - GTA: \$260B in economic activity
  - The Golden Horseshoe will add \$63B incremental GDP



# Population growth will also be concentrated in the GTA and Golden Horseshoe Area



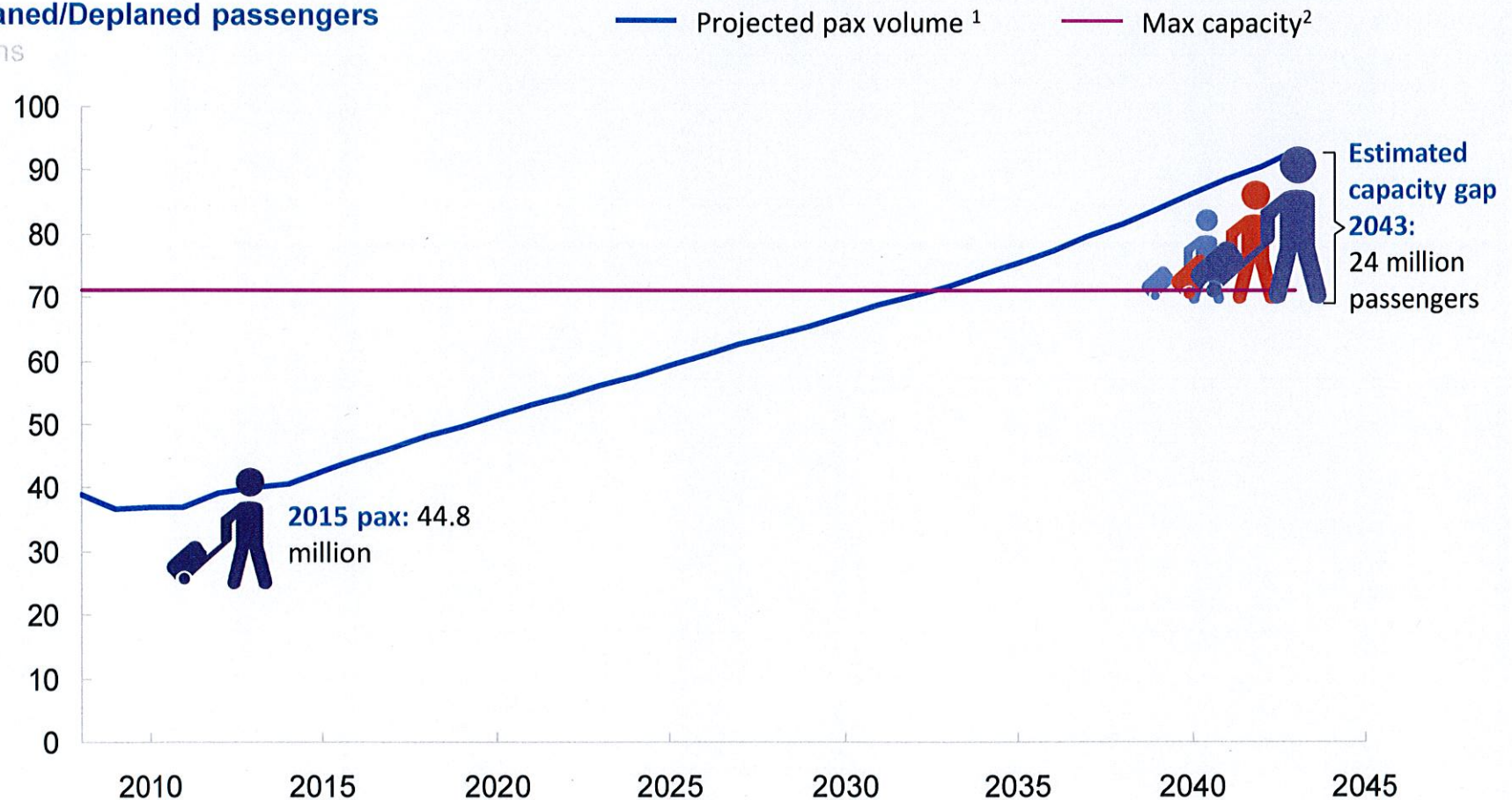
SOURCE: C4SE Economic Model, McKinsey analysis



# Regional Growth over the next 30 years will have an impact on air traffic

## Enplaned/Deplaned passengers

Millions



1 Projection for Southern Ontario passenger traffic (excluding Ottawa) based on base case economic and population growth

2 Estimated maximum regional capacity assuming no additional investment, except Pearson

SOURCE: C4SE Economic Model; GTAA data; regional airport data; McKinsey analysis



# Congestion is increasing ...

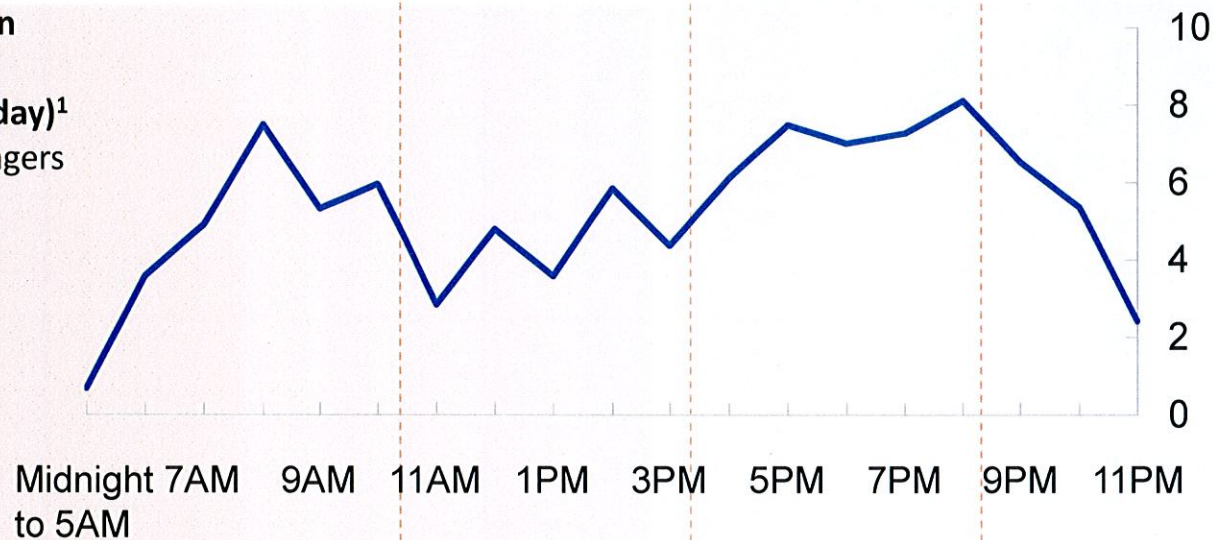


**By 2043, there will be a 25-35% increase in driving time  
to Toronto Pearson**



# And for ground transportation

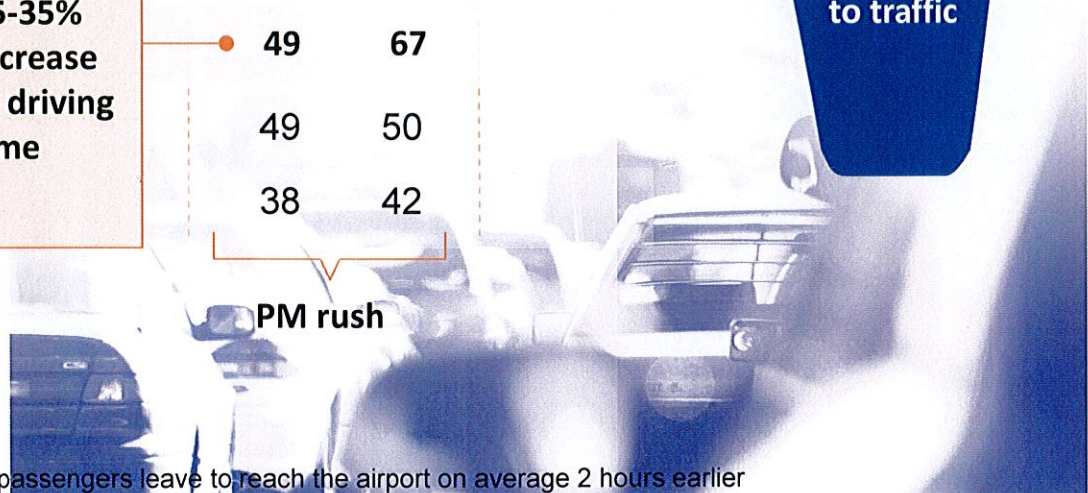
**Projected Pearson  
2043 passenger  
volume (for one day)<sup>1</sup>**  
Percent of passengers



Passengers  
will need to  
leave much  
earlier than  
ever before  
prior to their  
departure  
time due  
to traffic

**Travel time to Pearson  
(mins)**

	2014	2043		2014	2043
Downtown Toronto	27	30	25-35% increase in driving time	49	67
Downtown Hamilton	66	82		49	50
Pickering Town Centre	54	71		38	42
AM rush				PM rush	



<sup>1</sup> Does not correlate to flight departures. This chart represents when passengers leave to reach the airport on average 2 hours earlier



# Southern Ontario's Opportunity

- Our Region not the first to encounter – So, we've looked to learn from others, London, New York, etc.





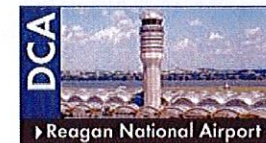
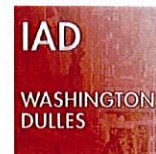
# Approach and Examples of Regional Airport Systems

- Multi-airport systems are increasingly common in city-regions;  
- 60 systems worldwide
- Multi-airport systems can have a division of roles between the airports involved

**London:** London Heathrow – Gatwick – Luton



**Washington, DC:** Ronald Reagan National – Washington Dulles International



**Paris:** Charles de Gaulle – Paris Orly



**New York:** JFK – Newark – La Guardia





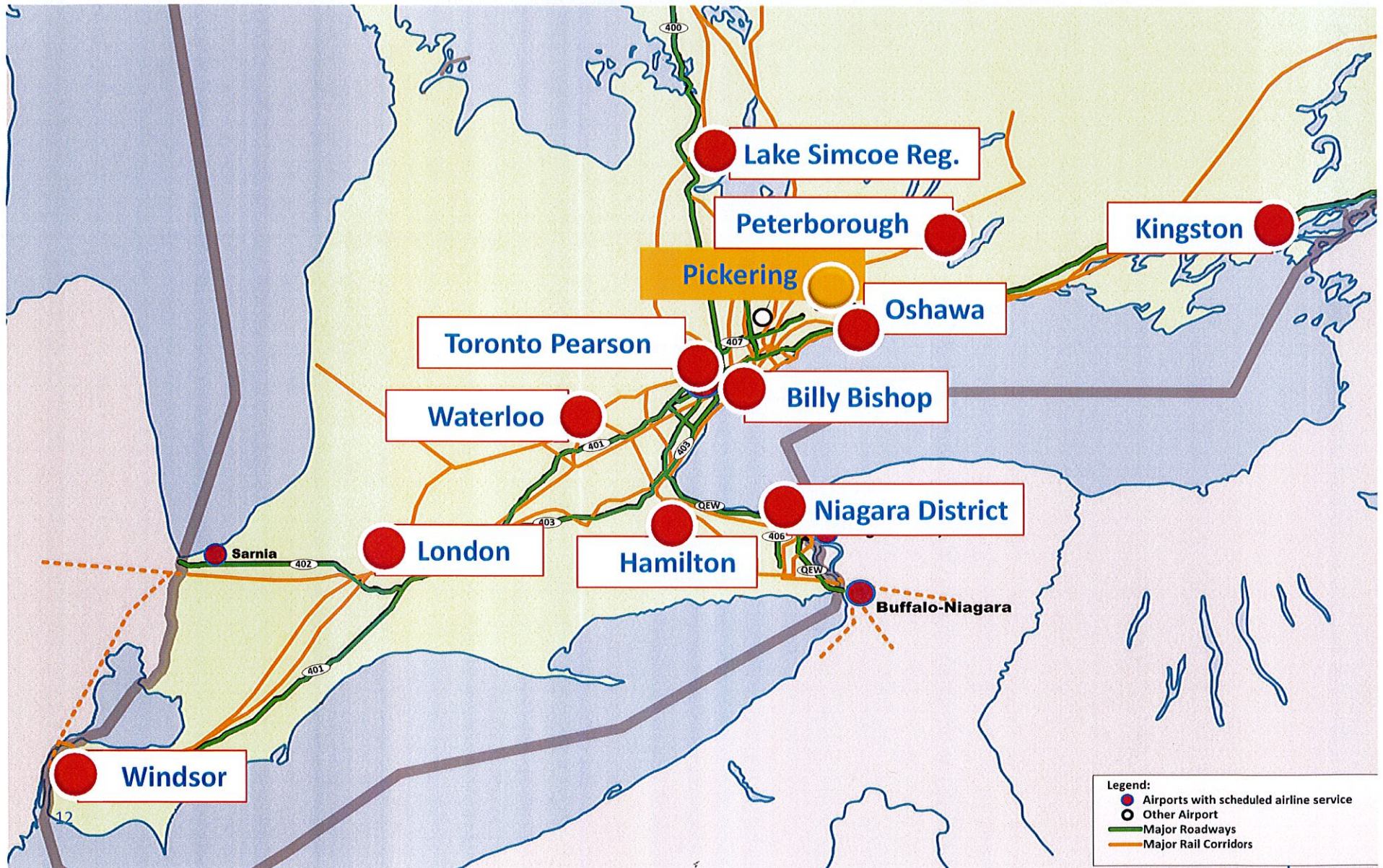
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- Southern Ontario is fortunate to have existing, well run, airport infrastructure it can rely on to support the regions growth



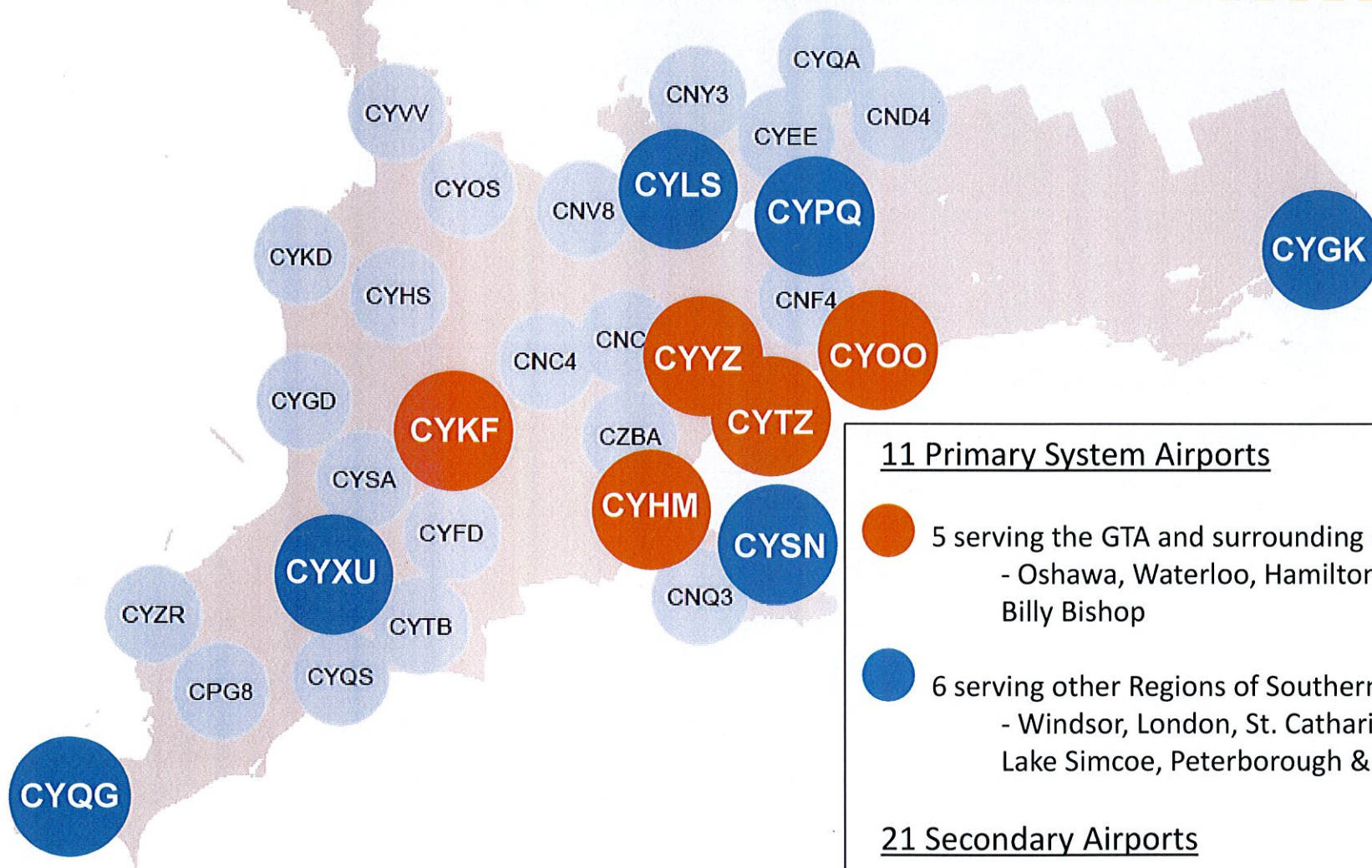


# South-Central Ontario has existing airport infrastructure it can rely upon to support growth








# South Central Ontario Airport System



## 11 Primary System Airports

-  5 serving the GTA and surrounding communities  
- Oshawa, Waterloo, Hamilton, Pearson & Billy Bishop
-  6 serving other Regions of Southern Ontario  
- Windsor, London, St. Catharines, Lake Simcoe, Peterborough & Kingston

## 21 Secondary Airports

-  Public Community Airports (i.e.: Lindsay)  
- Important relating to medical, corporate, Flight training and recreational flying



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- **Transportation infrastructure takes a long time to build -- the discussion needs to begin now**



# Southern Ontario's Opportunity

- Our Region not the first to encounter – so we've looked to learn from others, London, New York, etc.
- Southern Ontario is fortunate to have existing, well run, airport infrastructure it can rely on to support the regions growth
- Airport and ground transportation infrastructure takes a long time to build -- need to start the discussion now
- **By working collaboratively with Southern Ontario airports to find ways to accommodate increasing air travel demand over the next 20 years, Southern Ontario airports will be well placed to continue to support this region's economy, jobs and economic competitiveness**



# **Airports Working Together for Southern Ontario**

What we have accomplished:

- Developed a fact base on regional population and GDP growth
- Held regular meeting and established cooperative and collaborative relationships
- Established Business Driver Working Groups



# **Business Driver Working Groups**

## **General Aviation Development**

- Encourage growth in general aviation to help realize growing local business benefits.

## **Airport Economic Cluster Development**

- Promote greater use of airport lands to support the local economic development.

## **Aviation Development for airports with scheduled service**

- Encourage increased or new point to point service for airports that have scheduled air service.

## **Aviation Development for airports without scheduled service**

- Encourage small scale and charter point to point service for airports without scheduled air service.



# **Airports Working Together for Southern Ontario**

Where we are going:

- Speaking with one voice
- Looking holistically at future demands of air transportation and how these needs could be best served by a Southern Ontario system
- Sharing best practices and lessons learned in business development



# Thank you!

