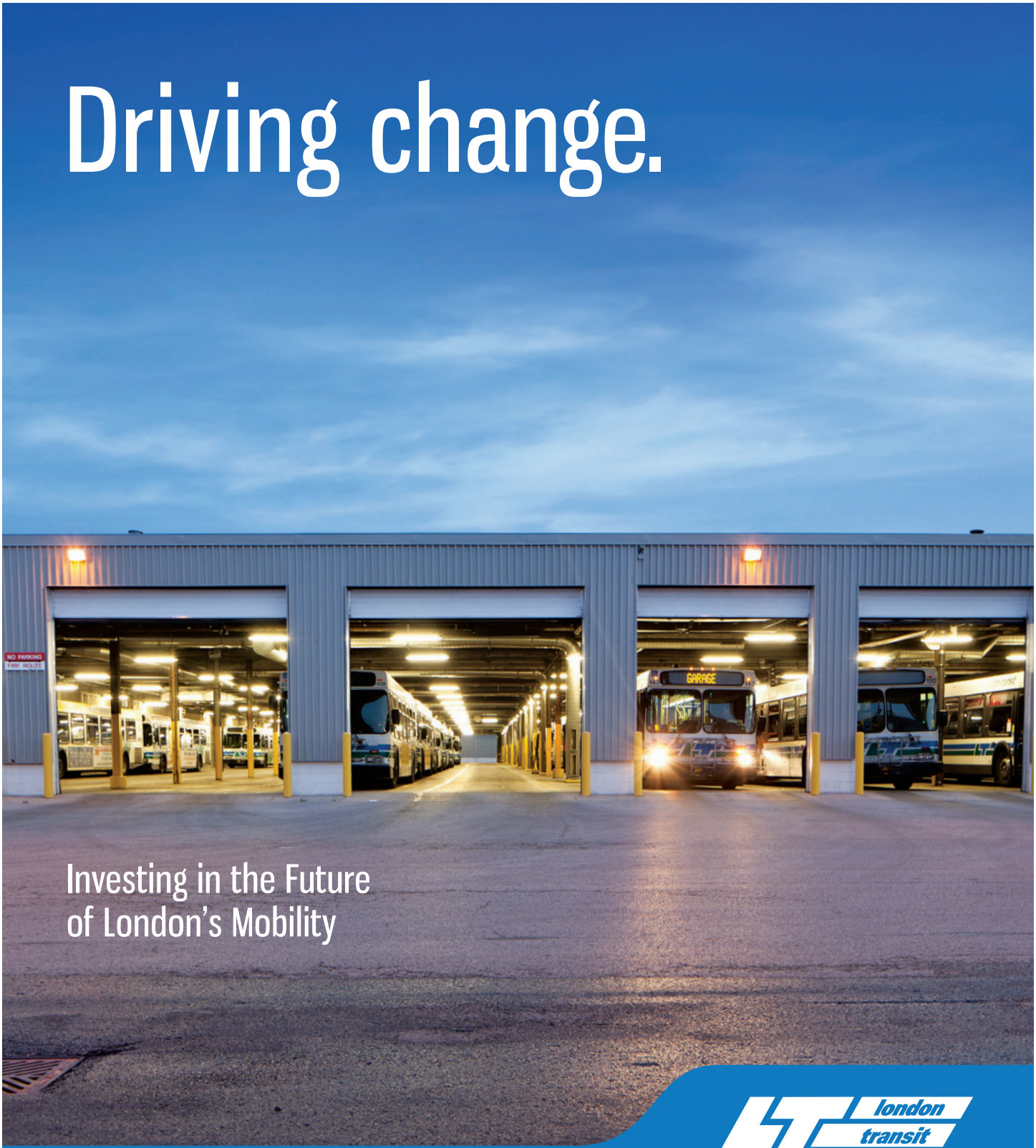
Driving change.



Investing in the Future of London's Mobility

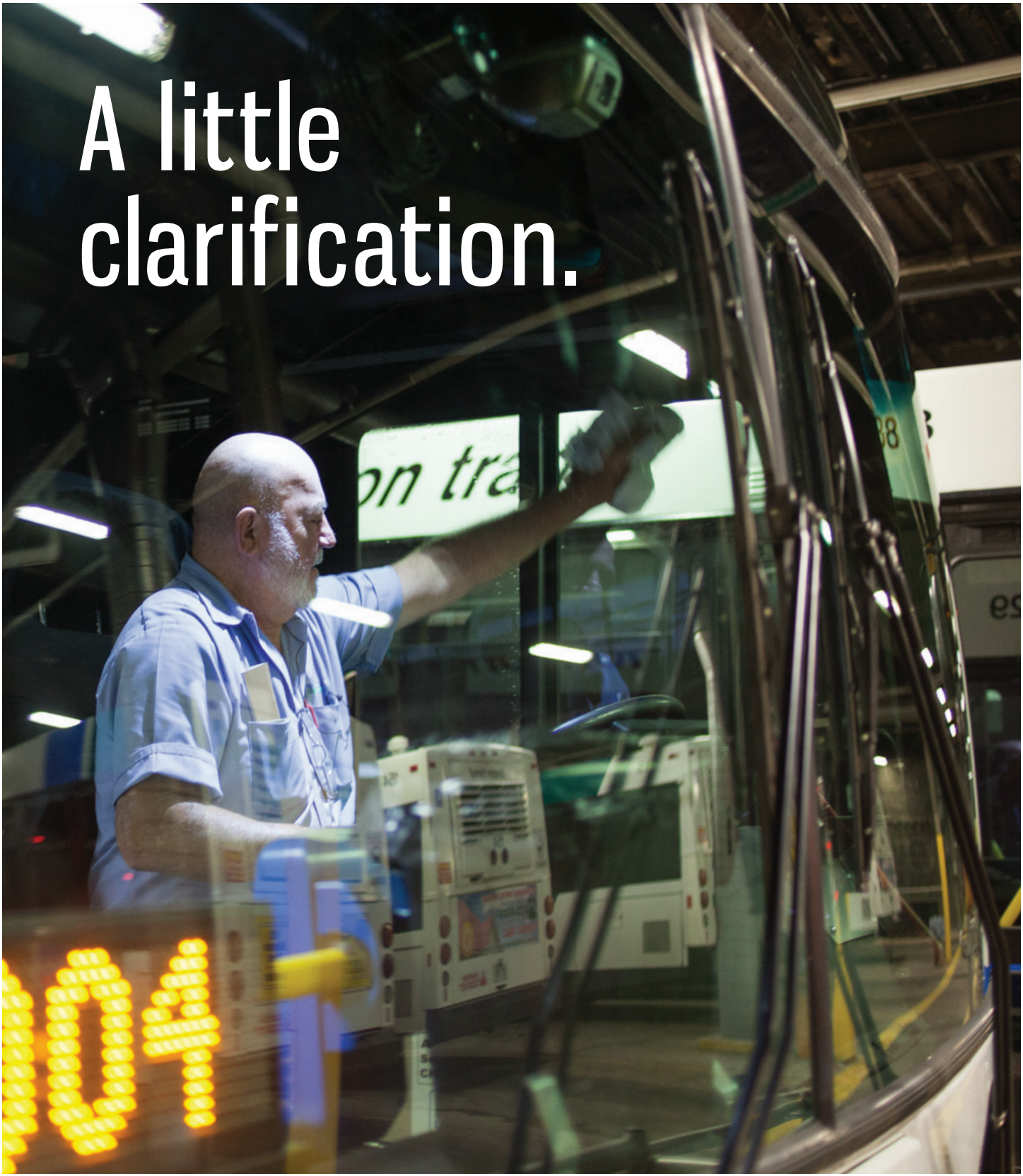
london transit


Transit
suits today's
pace of life.
Wellington
With ridership in London forecast to grow by 50% over the next 10 years, the current transit system will require extensive investment. Leading municipalities implement investment in transit as effective urban development strategies that can reduce infrastructure expense.

Transit offers enhanced mobility.

Effective public transit is the cornerstone of every leading EU country and most major North American cities. London, through it's London Plan and 2030 Transportation Master Plan, is moving forward to contribute to a higher quality of life for all Londoners.

A little clarification.



Benefits of Transit Investment

Sustainable development relies on three key components: economy, environment and social. Transit provides a balance between meeting human needs and transforming urban areas while helping to protect the natural environment.

Economic

Simply put, an investment in mobility is an investment in the economic prosperity of a city. Mobility planning and options are critically linked to land use planning (effective/efficient urban development). Transit has proven to be a fiscally sound and viable mobility option for progressive cities. Traffic slows down economic growth, and with traffic gridlock costing the Canadian economy $10 billion a year and growing, strategic investment in mobility is necessary.

A mobility system that allows people to move efficiently helps support local businesses and the economy at large. Reducing congestion costs decreases lost time and productivity caused by traffic delays. Transit also helps reduce infrastructure costs by diminishing the need for roadway expansion and the construction of parking facilities, in addition to limiting traffic control and enforcement costs. Mobility investment should thus be viewed as a key logistics strategy that fosters social and commercial wealth, and prosperity.

Environmental

It has consistently been proven that transit ridership has positive effects on the reduction of greenhouse gases and other air pollutants. If transit was not utilized, there would be almost 2 million more cars on the road in Canada every day. Increased ridership reduces the environmental impact of commuting, resulting in less pollution production and energy use per person per trip. This is important considering traffic-related pollution is one of the major causes of death in Canada. Transit also helps reduce the amount of land needed for road space and parking, thus helping preserve the natural landscape. Investment in transit mobility will lead to reduced health care costs and an overall healthier community.

ECONOMIC HIGHLIGHTS

- *Transit industry in Canada employs over 75,000 people and it's growing*
- *Companies with Canadian roots satisfy nearly 70% of the north American urban transit bus market and employ nearly 3,000 Canadians*
- *95% of Canadians say it is important or very important for their company to have access to public transit*
- *Transit suppliers exported $751 million worth of goods in 2012*

Source: Canadian Urban Transit Association

ENVIRONMENTAL HIGHLIGHT

- *Less than 1% GHG emissions created in an urban centre are from public transit vehicles*

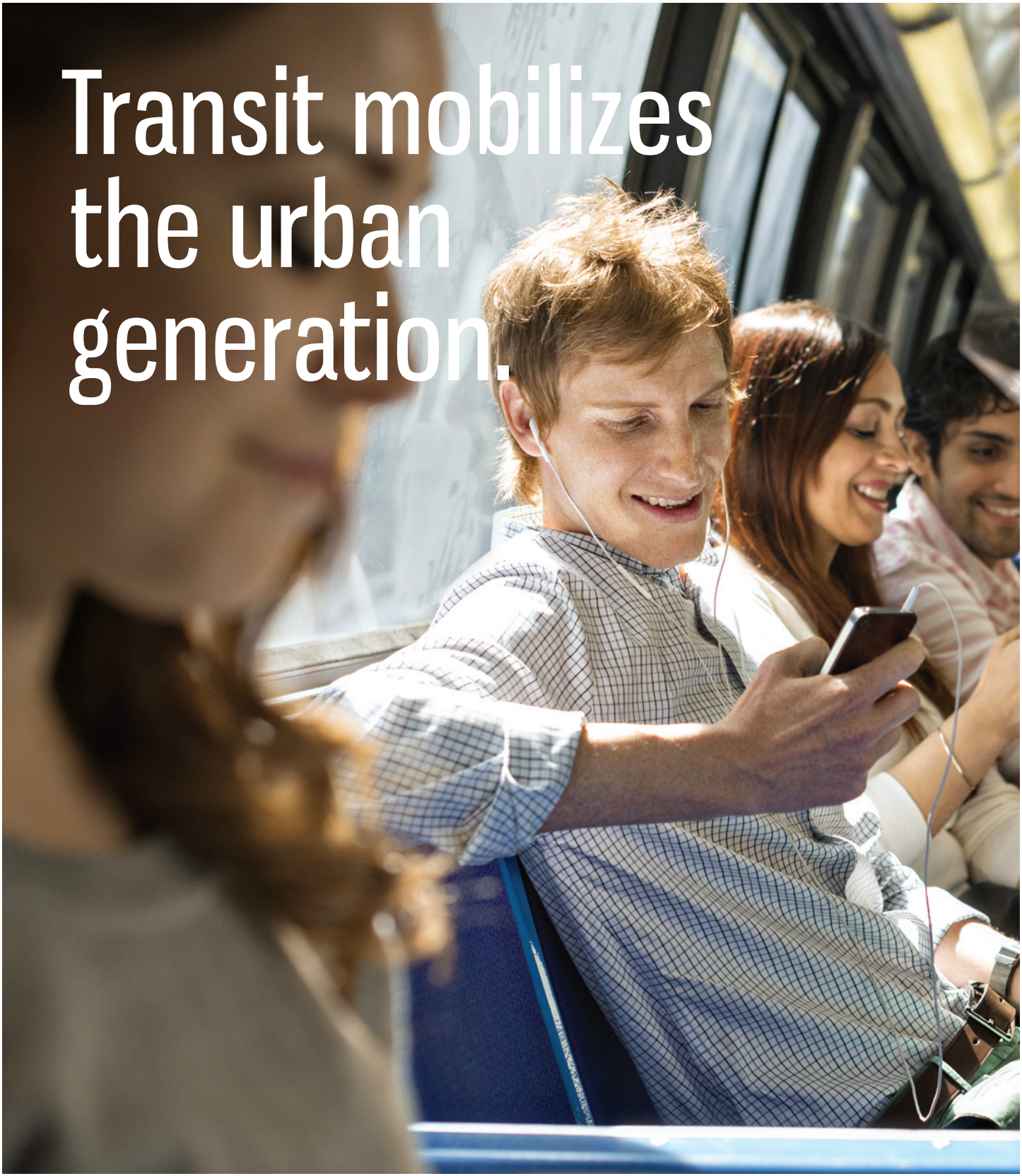
LTC ANNUAL OPERATING INVESTMENT PROVIDES:

550 DIRECT EMPLOYMENT JOBS FOR LONDONERS

$680K MUNICIPAL TAXES TO THE CITY

$25M IN THE PROCUREMENT OF LOCAL GOODS & SERVICES

24M TRIPS FOR WORK SCHOOL & PLAY


Transit mobilizes
the urban
generation.

Social – Community Access

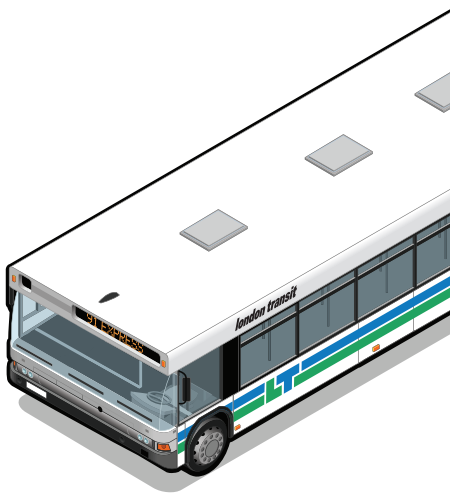
An efficient mobility system allows for residents to participate in their community in a more complete way. By reducing gridlock and air pollution, citizens are able to easily connect with other residents, and businesses have better access to employees and markets. An efficient mobility network helps promote more pedestrian friendly land use patterns and allows for greater access to employment, education, community centres, local businesses and special events all contributing to the vitality of the city.

Effective transit is an important lifeline within the city. A strong transit system also creates a safer city by reducing the number of cars on the road and decreasing the number of automobile collisions and deaths.

It is also important to take into account the changing face of ridership. Millennials, those born between 1980 and 2000, are less automobile focused and more environmentally conscious. This generation is an important factor in the development of urban planning and are an important demographic to consider when looking at the future of mobility. Their preferences and needs should be taken into account in order to develop a sustainable mobility system.

Specialized services ensure that citizens of all abilities can be active and engaged in their community, thereby creating a more inclusive city. As mobility systems continue to evolve, this is a standard that must be maintained. This will help aging individuals live independently for longer and avoid or delay the high expense of institutionalized care. The continued development of accessible, conventional and specialized transit services, including the integration of those two services, is critical to sustainability and helping all Londoners maintain their quality of life.

The Community of London Environmental Awareness Reporting Network (CLEAR Network) has estimated 33% of the energy consumed in the city was used by cars and trucks on city roads, most of which were personal vehicles.



Transportation Planning

Transit plays a central part in the success of a mobility strategy, as evidenced by its significance in the urban planning of leading EU and North American cities.

London Plan/2030 Transportation Master Plan

The 2030 Transportation Master Plan (TMP) and the London Plan are inextricably linked. They define how we grow as a place to live, work and play. Central to both plans is the role of transit in defining urban form and the city's sustainable transportation system.

While ridership over the past 15 years has grown by 11 million rides, service design and growth has not kept pace. Therefore we must ensure that our transportation infrastructure is viable, cost-efficient, and attractive, and can accommodate people of all abilities in large numbers. This is consistent with the sentiment expressed by Londoners that transportation planning is critical to the future development of the city. The London Plan highlights that municipalities need to shift how they view transit from a budget line on an operations ledger to an effective urban development tool. Attending to London's transportation needs cannot simply rely on road expansion; transit is an important part of getting there. Investing in rapid transit and implementing a network of active transportation facilities will help us achieve this.

The 2030 Transportation Master Plan supports this vision with the goal of improving the mobility of residents through viable modes of transportation and provides attractive travel choices for those who live, work and play in the city. The current transit system mode share of 12.5% exceeds the targeted 10% mode share by 2020 established in the 2004 TMP. In order to accommodate continued growth in demand, significant investment is needed to increase the level of service system wide.

Foresight is critical. We must answer some fundamental questions sooner rather than later, like "what kind of city do we want to live in 20 years from now?"

Snapshot of London Transit

With ridership growing to 23.6 million in 2013, and projected further growth of another 50% to 33 million riders by 2024, planning for a city that will support rapid transit can't be ignored.

System Overview

London Transit's customer-focused vision is built on five pillars: safe and efficient service, financial responsibility, reliable and accessible infrastructure, informed relationships and supporting employees' success. It's recognized that there is a disparity between ridership growth and service growth, which will negatively impact the sustainability of the service.

The system needs to migrate to a higher form of service delivery, which requires increased investment. The 2030 Transportation Master Plan calls for conventional transit to move to an enhanced corridors and nodes design using a Bus Rapid Transit (BRT) platform, making mobility more efficient.

Rapid Transit corridors will help to make active forms of transportation viable and attractive, and in doing so will help minimize the cost of expanding streets, save energy, reduce emissions, encourage infill and intensification, allow for mixed-use development, and support a more resilient city that is adaptable to change.

AT A GLANCE: CONVENTIONAL TRANSIT SERVICES PROFILE (2013)

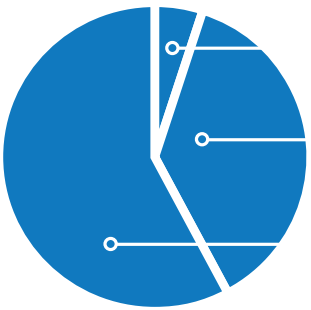
- *Type of service: Fixed Route (modified radial service)*
- *Service Day: 18 hours daily (Monday to Saturday) 15 hours daily (Sundays & Holidays)*
- *Annual Revenue Service Hours: 568,000*
- *Routes: 38 Fixed Routes plus 4 Community Bus Routes*
- *Fleet: 194 Buses, 30', 40' & 60' (all low floor accessible)*
- *Facilities: 2*
- *Ridership: 23.6 million*
- *Rides Per Capita: 63.2*
- *Rides Per Revenue Service Hour: 42.1*

SPECIALIZED TRANSIT SERVICES PROFILE (2013)

- *Type of service: Pre-booked, door to door*
- *Service Day: Same as conventional transit*
- *Annual Revenue Service Hours: 103,400*
- *Ridership: 255,300*

INVESTMENT SOURCES 2013

CONVENTIONAL TRANSIT SERVICES

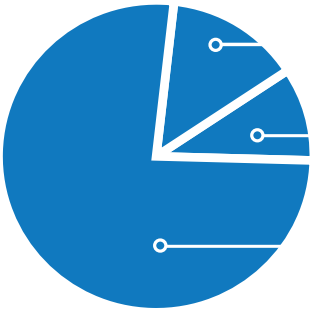


5% Provincial Gas Tax

37.2% Municipality

57.8% Passenger & Operating

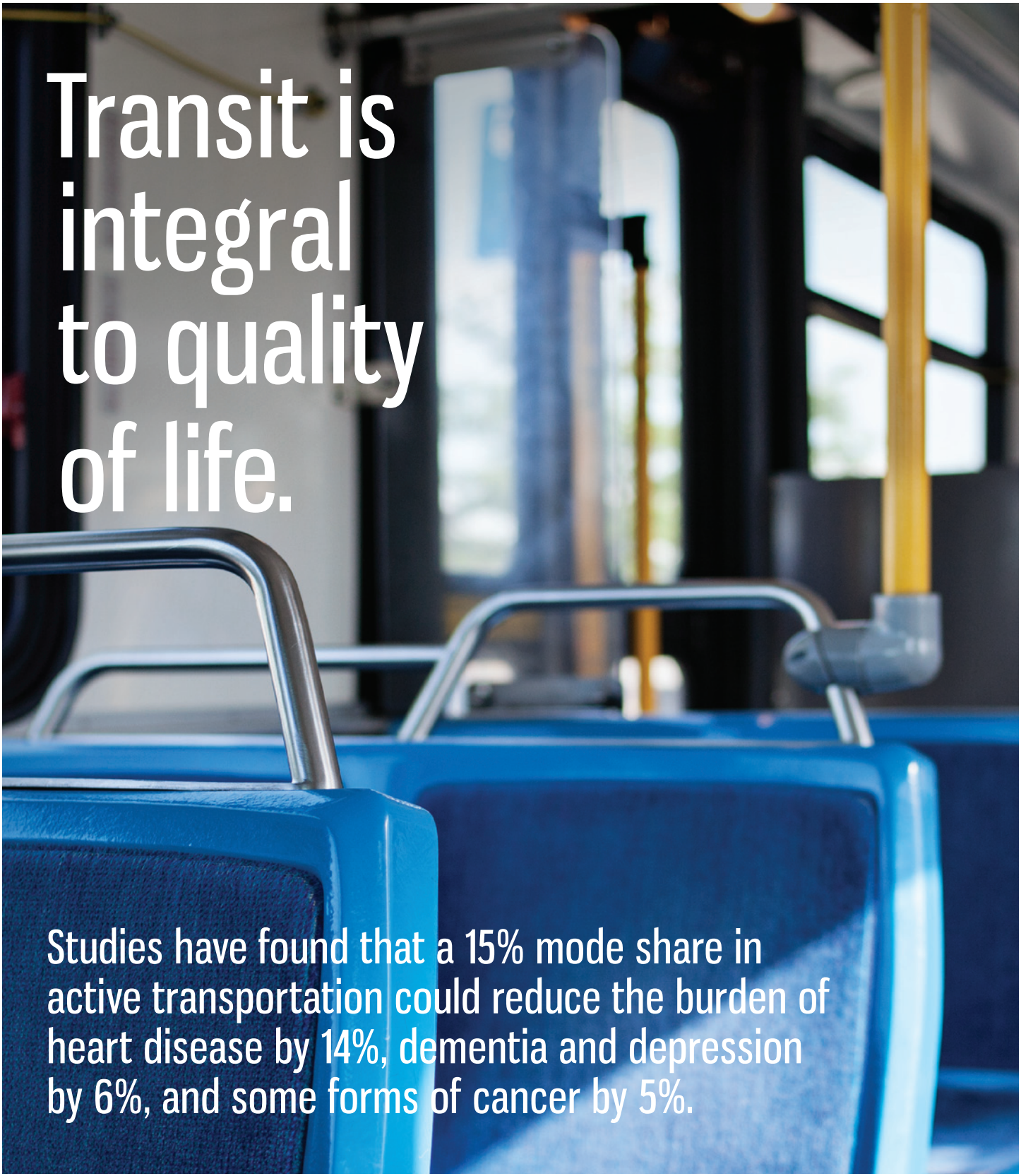
SPECIALIZED TRANSIT SERVICES



13.7% Provincial Gas Tax

9.7% Passenger & Operating

76.6% Municipality


Transit is integral to quality of life.
Studies have found that a 15% mode share in active transportation could reduce the burden of heart disease by 14%, dementia and depression by 6%, and some forms of cancer by 5%.

Service Performance

London's historic and current ridership 'growth to service growth ratio' has helped keep London in the lead in comparison to its peer group. However, it has also led to a decline in service quality. There has been a 27% increase over the past couple of years in the number of times buses have reported full loads, while actual load counts for weekday service on a system-wide basis have exceeded seated capacity by 25% to 64% for all time periods (with the exception of early morning usage).

Such performance can be expected to result in a decline in ridership if improvements are not made. Since 2010, service performance complaints have trended upwards representing a 54% increase. The most significant complaints have been schedule adherence (late) and missed passengers (full load) accounting for 43% of all service complaints.

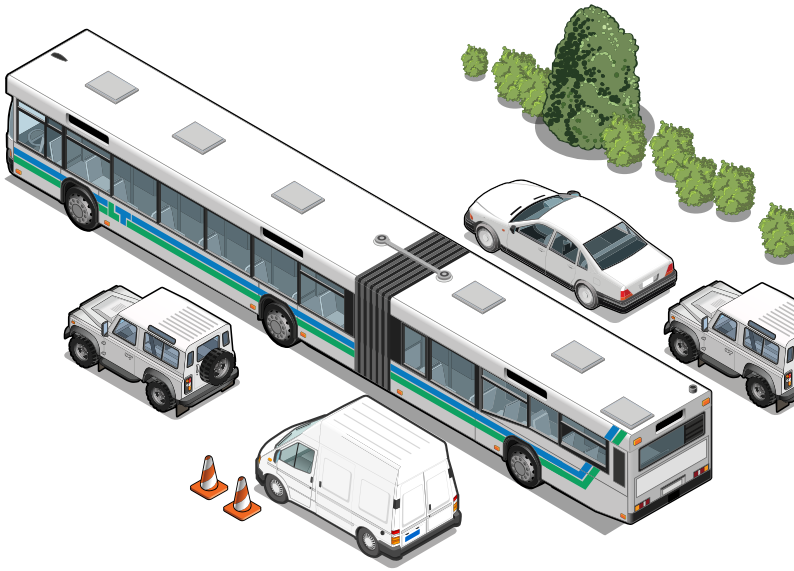
Addressing the service quality and growth issues, in the short term, has been constrained by economics, limiting service improvements to the most critical areas of deficiency.

In terms of conventional service comparison to the peer group, London's performance is at or near the top in all key financial and service performance indicators.

The same favourable financial performance applies to specialized transit services as well. The operating costs and municipal costs per trip for both types of service are significantly lower than the peer group average. Further, as with conventional transit, municipal investment in specialized transit is well below the Ontario average.

ONTARIO PEER GROUP COMPARISONS – CONVENTIONAL

- *Municipal investment: Lowest*
- *Cost per ride: Lowest*
- *Rides per capita: Highest*
- *Rides per Service Hour: Highest*



Bus Rapid Transit (BRT)

Municipalities need to migrate old thinking about transit services to planning and investing in well-designed systems that attract ridership, increase property values and encourage development.

BRT: The Future

The goal of the BRT is to provide faster, more efficient service as an integral part of London's 2030 Transportation Master Plan. A typical BRT vehicle will allow for 100-110 passengers per bus, with ridership levels of 1,200 per hour per direction. The BRT plan will be implemented in stages and includes two routes, operating north/south along Richmond/Wellington and east/west along Oxford/Dundas with local feeder services supporting the BRT corridors.

The development of the BRT will also have significant returns for London's economy:

- The construction of the necessary infrastructure to support the BRT will lead to 3,500 jobs per year.
- Post-construction will also employ 110 in full time equivalent jobs.
- On a larger scale, the BRT supports the intensification of residential and employment growth along BRT corridors.

London is starting the migration of the system with the implementation of transit priority measures on the Richmond corridor and the introduction of semi-express services along the BRT corridors.

The development of the BRT will allow the city to attain the mode share target of 20% set out in the 2030 Transportation Master Plan. Without the BRT, the mode share targets will not be attained. The BRT is therefore not only vital to London's economy, but also to the success of the city overall within the next 20 years.

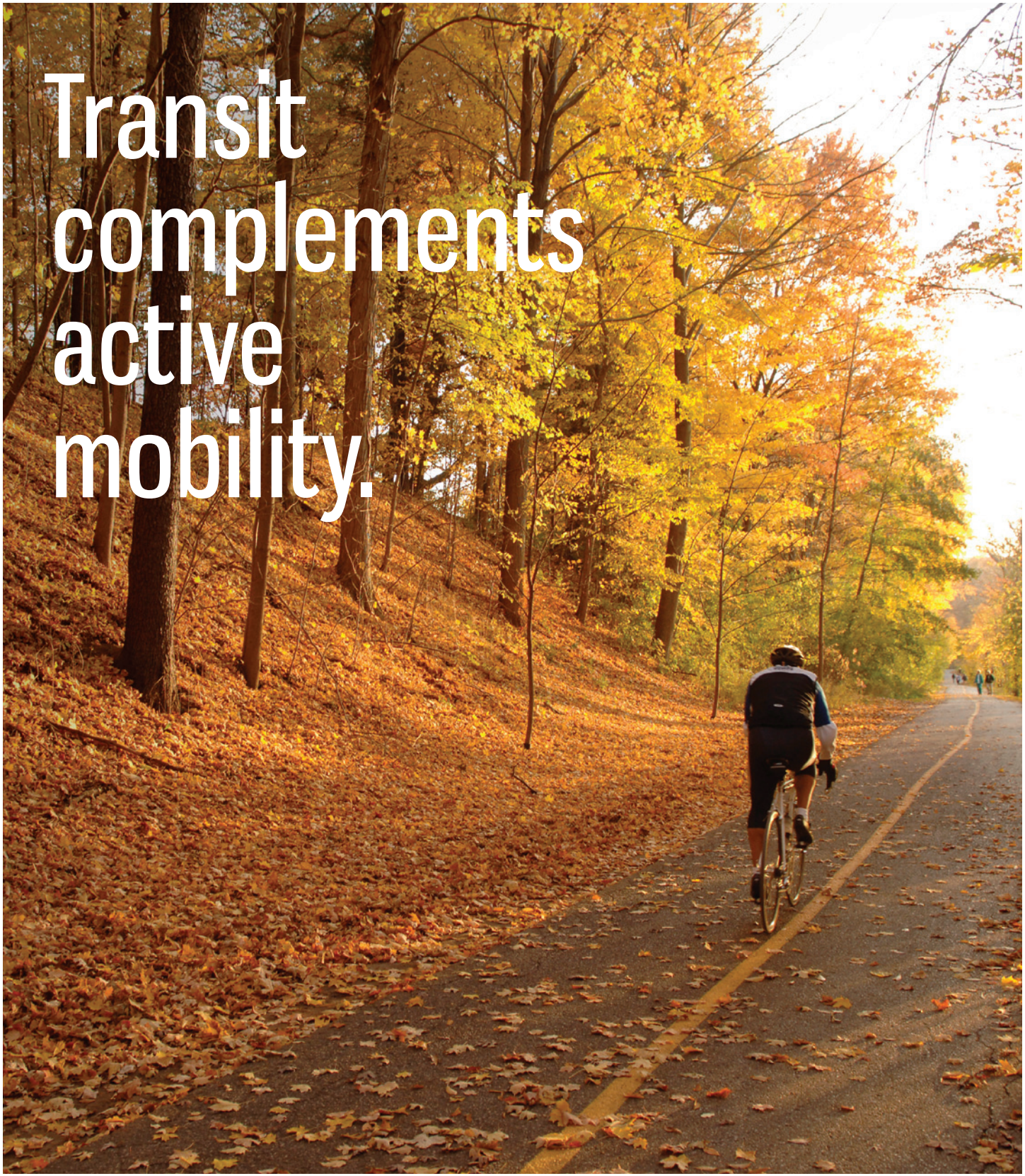
HIGHLIGHTS

- The $381.8 million investment is expected to be shared equally between the three levels of government
- The investment will provide an 11.3% economic rate of return over a 30 year period
- Service speed, reliability and flexibility are significantly increased, compared to conventional transit routes
- By offering a premium service, BRT is more attractive to riders and helps increase ridership and revenue
- It supports a healthier and safer community due to reductions in GHG emissions and traffic accidents
- Economic and quality of life benefits for riders include transportation cost and time savings
- Implementing BRT will avoid $290 million in road widening costs

A future rapid transit network would help to support a revitalized downtown, as well as providing enhanced accessibility to key destinations in outlying areas, including Western University, Fanshawe College, Oakridge Mall, White Oaks Mall and Masonville Place.

EVERY $1 INVESTED IN BRT GENERATES

$1.80 OF BENEFITS


Transit
complements
active
mobility.

The Smart Card

In order for London Transit to accommodate the needs of Londoners and move towards a more efficient and sustainable mobility system, certain changes must be made. The Smart Card System to be phased in starting Fall 2014, has been implemented in other cities and provinces across Canada with positive results, which is promising for London's mobility future.

The Smart Card System is a technology-based system that, once fully implemented, will replace existing ticket and pass programs. Buses will be equipped with readers where customers will tap their smart cards to record the trip, have the appropriate fare deducted and apply a 90 min transfer. Hand-held readers will be used on specialized vehicles. This $3.7 million investment is fully funded by the Provincial Gas Tax and provides an expected payback of 8 years while improving overall efficiency.

HIGHLIGHTS

- Provides greater fare program flexibility
- Supports faster boarding times
- Mitigates operator/customer fare conflict
- Contains fare administration costs
- Improves accuracy of ridership reporting

1 BRT BUS REPLACES 100+ CARS

AND MOVES ON AVERAGE 110 PASSENGERS EVERY HOUR

Q&A

LTC strives to perform to the highest levels possible and operate with complete transparency.

The following are commonly asked questions and/or misconceptions regarding London Transit.

Why do all buses service the downtown?

Currently 19 of the system's 38 fixed route services (50%) go downtown. The downtown is a key transit generator and transfer facility supporting passengers access/travel to other areas of the city. There are in excess of 12,000 trips to/from the downtown per weekday.

Why doesn't London Transit operate on a grid?

London's geography and urban development does not support operating on a grid system. Route design is a balance between providing service to where people live and providing fast efficient and direct travel where people want to go. London Transit strives to deliver transit service that enables 90% of all contiguous urban development to be within a walking distance of no more than 400 metres to public transit.

When big buses run at under capacity, why aren't smaller buses used for greater efficiency?

Fleet size and makeup is predicated on requirements for periods of highest demand. The use of smaller buses to address the perception of "too much bus" simply results in the need for two fleets, one fleet of large buses for periods of high demand, and another fleet of small buses for periods of less demand.

Why is it such a challenge to service the industrial areas?

Industrial areas are a challenge to service given their location at the periphery of the city, their site design with large setbacks, and limited pedestrian ameneties. Further, with the nature of employment typically being 24/7 with multiple shifts and employees who travel from all areas of the city, it creates the need for passenger transfers and challenges for route scheduling and frequency.

Does LTC operate out of the Wonderland facility?

London Transit has been operating out of the Wonderland facility since 2011. Currently, on a Monday to Friday basis, 40 buses are dispatched from and serviced at the facility. The facility operates as a satellite with capacity for 100 buses. Construction was fully funded by Provincial and Federal investment.

Transit makes life easier, greener and more affordable.

Urban planning for improved transit, including improved rights-of-way can make mobility more convenient and cost-effective and should be central to London's mobility strategy.

CONVENTIONAL TRANSIT

OPERATING COST PER RIDE

$2.49

MUNICIPAL INVESTMENT PER RIDE

$0.93

LONDON TRANSIT CAPITAL BUDGET INVESTMENT SHARE

- RESERVES **3.4%**
- FEDERAL GAS TAX **9.8%**
- CITY OF LONDON **25.7%**
- PROVINCIAL GAS TAX **61.1%**

MODES OF TRANSPORT

- WALKING OR CYCLING **9%**
- CAR **73.5%**
- SCHOOL BUS TAXI/MOTORCYCLE **5%**
- BUS **12.5%**

45% OF RIDERS COMMUTE TO SCHOOL

24% COMMUTE TO WORK

31% COMMUTE FOR OTHER REASONS

RIDERSHIP IN THE NEXT **10 YEARS**

PROJECTED TO INCREASE

50%

For more information on the Future of London's Mobility, please contact:

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Resources

2030 Transportation Master Plan: SmartMoves
The London Plan 2014
The Canadian Urban Transit Association (CUTA)

ltconline.ca/drivingchange

LTC photography by Steven Domjancic/Gotham Studios