SCOPE OF WORK

Demand and Revenue Due Diligence

➢ Understanding the scale of the travel market and characteristics of key market segments.

➢ Awareness and insight into market drivers and trends.

➢ Area of influence and market share.

➢ Service/product evaluation: assessing the potential of alternative routes and modes.

➢ Price sensitivity (both own price and cross-elasticities).

➢ Awareness of the impact of demand, operation strategy and network integration

Road Sector

Primary Analysis

➢ Primary Data Collection and Analysis: We collect first-hand data through field surveys, like Video/ATCC based classified Traffic Volume Count, Origin Destination Survey and commodity movement;

➢ Historical analysis to establish growth patterns a relationship with growth drivers;

➢ A study of the Project Influence Area (PIA), Alternate routes/modes to the project and assessing the possibility of diversion of traffic from/to the project road under consideration due to existing/future developments.

Additional Analysis

➢ Studying the socio-economic factors influencing the traffic and establishing reasonable projections of these factors.

➢ Understanding the expected future development plans (Commercial/Industrial) in the PIA.

➢ Studying the impact on traffic due to region specific activities such as mining, construction of a new major project such as port, major bridge having temporary impact on the traffic on project road.

➢ A detailed highway network assessment to identify competing routes and analyse the network, Traffic Characteristics & level of toll charged, if any on competing corridors.

Airport Sector

Passenger and Cargo forecasts

➢ Historical growth of the Air traffic (Passenger and Cargo) both domestic and international along with estimated future air traffic potential;

➢ Projection of the future air traffic and aircraft movements by developing a traffic forecasting model to forecast traffic under various growth scenarios of independent variables that would best explain the future air traffic growth in the catchment;

➢ The data for developing the base model is collected through both primary surveys, like interviewing samples of various stake holders, and secondary surveys to collect all historical information of Air traffic, Airline capacity.

Revenue forecasts

➢ The aeronautical revenue including passenger fees, Cargo Handling charges, Landing fee, Parking revenues, ground handling, fuelling charges etc. is projected based on passenger and cargo forecasts. Non-aero revenue from sources such as car parking, retail is also estimated. It will also be used as input for dimensioning of the airport facilities and for the economic and financial viability analyses.

Rail Sector

➢ The historical passenger and revenue data, from Indian railways, is used as a basis to analyse past trends of origin/destination, ticket class, seasonal trends and growth recorded;

➢ Analysis of goods on trains involves studying commodities carried by tonnage to different destinations, and revenue generated against goods;

➢ Additional study is conducted for competitive modes (airway, roads) available for specific routes and the cost/benefit analysis for all modes contributes to passenger and revenue projections.

Metro/Transit Sector

➢ Besides study of historical ridership and revenue data, we also include analysis of planning/employment/population data and the overall demographics of riders by different routes. This study includes observing weekly/monthly trends to create a robust ridership profile;

➢ Behavioural research is done through surveys such as revealed and stated preference surveys to estimate the optimum user fees to be levied to improve revenue generation;

➢ Other competitive modes are also studied in detail with data collection to better project the ridership.

Bus / e-Mobility Sector

➤ The passenger forecasts for bus sector also involves an extensive study of the demographics of travellers as well as the socio-economic factors for the catchment area;

➤ The comparison of operational capacity such as fleet size and scheduling plans with the demand on the specific routes help in establishing more realistic projections;

➤ A thorough study of competitive modes based on cost analysis and establishing user preferences through primary surveys is one of the key parameters in our approach to provide passenger and revenue forecasts.