



COVID-19: Restart and Recovery Update

Date: September 24, 2020
To: TTC Board
From: Chief Executive Officer

Summary

In June 2020, the *COVID-19 – Transitioning from Response to Restart and Recovery* report to the Board outlined key actions in preparation for the Province's reopening of the economy and gradual lifting of restrictions. The purpose of this report is to provide an update on the restart and recovery plan and outline new measures in preparation for a resurgence of COVID-19. The safety of customers and employees continues to be the primary concern of the TTC in the delivery of essential public transit services.

As of July 31, 2020, Toronto is in Stage 3 of the Province's Reopening Framework. Under Stage 3, nearly all businesses and public spaces can gradually reopen, with workplace safety and public health measures in place. As anticipated, ridership has increased over the summer. As of September 12, revenue ridership is 37% of budgeted levels. Based on ridership trends it is expected that fall 2020 ridership could be as low as 40% or as high as 60%. For the purpose of financial projections an average of 45% of ridership through the fall is assumed.

Updated estimates indicate that COVID-19 will have a gross financial impact of approximately \$745 million by year end, taking into account revenue losses, and COVID-19 expenditures. Cost containment measures will continue into the fall albeit at a reduced rate as service is gradually restored in response to demand approaching 50% of normal ridership. The estimated net financial impact to year end is \$590 million. Estimates are dependent on the extent and pace of returning ridership demand.

The *Safe Restart Agreement* by the provincial and federal government will provide necessary funding to address the financial pressure facing the TTC. Up to \$404 million has been allocated to the City of Toronto for financial pressures incurred between April 1, 2020 and September 30, 2020. A second phase of funding is available based on demonstrated need for COVID-19 impacts up to March 31, 2021. Based on current estimates and understanding of funding eligibility the TTC expects to maximize Phase 1 funding. The TTC anticipates a gross financial pressure of \$501.9 million between April 1, 2020 and September 30, 2020. Any residual pressure to year end is expected to be offset by Phase 2 funding. Further updates to the Board will be provided once program details are finalized. The TTC will also continue to work with government partners to advocate for ongoing emergency funding post March 31, 2021 and the development of a sustainable funding model for public transit.

Recommendations

It is recommended that the TTC Board:

1. Endorse the expenditures of \$39.1 million for COVID-19 related activities forecasted to December 31, 2020, and provide the Chief Executive Officer delegated authority up to \$15 million in order to implement any additional measures necessary to protect health and safety.
2. Request the Chief Executive Officer in partnership with the City of Toronto to continue engaging the provincial and federal governments to advocate for ongoing operating funding and the development of a sustainable funding model for public transit.

Financial Summary

At the June Board meeting the *COVID-19 – Transitioning from Response to Restart and Recovery* report reflected a projected net financial impact to Labour Day of \$416 million, before the application of Provincial Gas Tax funding. The current estimated net financial impact to Labour Day is now \$373.4 million. This reflects an improvement of \$42.6 million mainly from higher than expected passenger revenue. In June, summer ridership was projected at 20% of budgeted ridership. Actual ridership ranged between 30-35%.

Table 1. COVID-19 Impact to Labour Day					
	June Estimate	Current Estimated Impact to Labour Day			Change (June vs. Current)
Item (\$M)		Conventional	Wheel-Trans	Total	
Passenger Revenue Losses	497.8	458.7	3.4	462.1	(35.7)
Ancillary Revenues Losses	7.2	5.8	-	5.8	(1.4)
Incremental COVID Expenses	27.5	19.4	0.3	19.7	(7.8)
Financial Impact Before Cost Containment	532.5	483.9	3.7	487.6	(44.9)
Cost Containment Actions	(116.5)	(86.2)	(28.1)	(114.3)	2.2
TTC Net Financial Impact to Labour Day	416.0	397.7	(24.3)	373.4	(42.6)

The projected year-end variance will be dependent on the extent and pace of ridership recovery. The table below assumes ridership levels averaging 45% of budget through the fall, which is up from 23% experienced at the end of June and 35% reached in

August. Based on this assumption, current estimates indicate that COVID-19 will have a gross financial impact of \$744.4 million on the TTC by year end.

Cost containment measures are projected to continue into the fall albeit at a reduced rate as service is gradually restored and the TTC approaches 50% of normal ridership levels. The net financial impact to year end is estimated to be approximately \$589.5 million as outlined in the table below.

Table 2. TTC COVID-19 Projected Impact to Year End			
	Conventional	Wheel-Trans	Total
Passenger Revenue Losses	671.9	4.8	676.7
Monthly Pass Credits	12.8	-	12.8
Ancillary Revenue Losses	15.8	-	15.8
Incremental Costs - COVID	38.8	0.3	39.1
COVID Impact before Cost Containment	739.3	5.1	744.4
Cost Containment Actions	(114.1)	(40.8)	(154.9)
COVID Impact after Cost Containment	625.2	(35.7)	589.5

The TTC expects to receive intergovernmental funding from the following programs to address fiscal pressures from COVID-19:

- \$404 million under Phase 1 of the Safe Restart Agreement for the period April 1, 2020 to September 30, 2020. The City of Toronto will also receive a second phase of funding for eligible transit impacts for the period October 1, 2020 to March 31, 2021, with allocation to be determined; and
- \$7.36 million in provincial funding under the Municipal Transit Enhanced Cleaning Fund.

Based on current estimates and understanding of funding eligibility the TTC expects to maximize Phase 1 funding. The TTC anticipates a gross financial pressure of \$501.9 million between April 1, 2020 and September 30, 2020. Any residual pressure to year end is expected to be offset by Phase 2 funding. Further updates to the Board will be provided once program details and eligibility requirements are finalized.

Equity/Accessibility Matters

The TTC believes that all customers should enjoy the freedom, independence and flexibility to travel anywhere on its transit system, and is currently making Toronto's transit system barrier-free by implementing changes, which will make all of its services and facilities accessible. The TTC continues to work with the Advisory Committee on Accessible Transit (ACAT) to ensure that customers with disabilities and seniors are accommodated on all transit services during the restart and recovery process. The TTC

resumed regularly scheduled ACAT activities in June in the form of virtual and call-in meetings and consultations.

The TTC has responded to the pandemic with a demand-responsive service plan that takes into account the equity impacts on diverse communities. The plan protects high-ridership corridors, healthcare facilities, essential employment, shopping and neighbourhood improvement areas.

In order to mitigate the potential equity impacts of COVID-19 to customers, the TTC has also implemented measures, such as:

- Providing monthly pass PRESTO credits to customers for March and April;
- Resuming legacy fare payment options (e.g. cash, ticket, token) on the bus network;
- Working with the City's Streets to Homes program to support customers experiencing homelessness; and
- Distributing non-medical masks to vulnerable communities through a distribution strategy developed with the City's Poverty Reduction Office.

Decision History

At the May 13, 2020 meeting, the TTC Board received a presentation "[TTC's Response to COVID-19](#)" and a report "[Preliminary COVID-19 Financial Impacts for the TTC](#)". The Board endorsed expenditures required for COVID-19 response activities; and endorsed the cost containment and workforce realignment strategy. The Board also approved a net reduction of \$208.1 million to the TTC's 2020 Approved Capital Budget and a reduction of \$117.5 million to the 2020-2029 Capital Budget & Plan.

At the June 17, 2020 meeting, the Board received a report "[COVID-19 - Transitioning from Response to Restart and Recovery](#)". The Board made the following decisions:

- Non-medical mask/ face covering are a mandatory requirement on the TTC effective July 2, 2020, subject to some exceptions;
- Endorsed the expenditure of \$27.5 million required for COVID-19 related activities to Labour Day, and provide the Chief Executive Officer delegated authority of up to \$15 million to implement health and safety measures;
- Authorized a pro-rated credit to March and April pass holders;
- Approved the recommendations as set out in Confidential Attachment 2 - Rent Relief and Term Extension for TTC Retail Tenants; and
- Requested the federal and provincial governments to provide emergency operating funding.

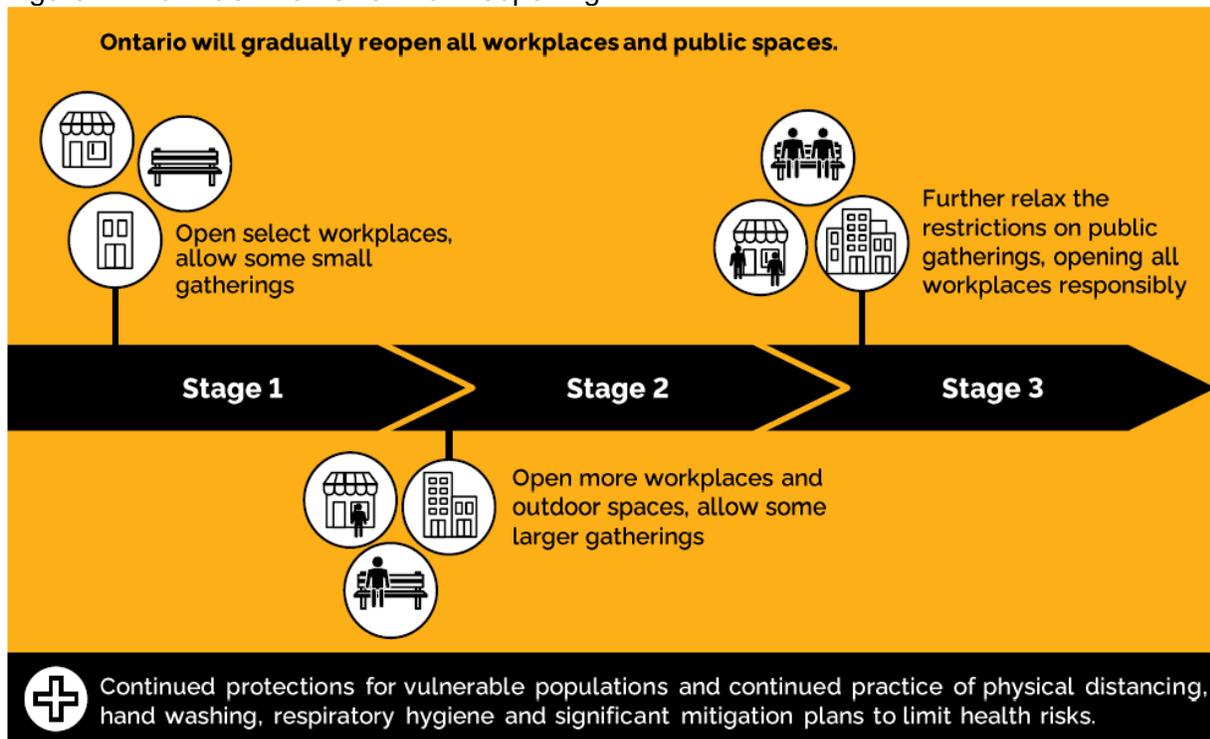
Issue Background

On March 11, 2020, the World Health Organization (WHO) declared COVID-19 a global pandemic. By March 17, the Province of Ontario declared a state of emergency. All non-essential work places were ordered closed and gatherings restricted. The TTC, as an

essential service, continued to operate throughout the pandemic supporting access to essential work, groceries, pharmacies and care. Ridership declined at the lowest point by 80 to 85 percent at the height of provincial restrictions that were in place.

In May, the Provincial government outlined Ontario's staged approach to reopening the province in a "[Framework for Reopening our Province](#)". Toronto entered Stage 3 on Friday, July 31, 2020. Under the Stage 3 order and regulation made under the *Province's Reopening Ontario (A Flexible Response to COVID-19) Act*, nearly all businesses and public spaces can gradually reopen, with workplace safety and public health measures in place.

Figure 1. Provincial Framework for Reopening¹



In June, a restart and recovery plan was developed to prepare the organization to transition from response to restart and recovery, with consideration to the following realities:

- Ridership demand is dependent on the pace of reopening by the Province, the City, and sectoral plans for resumption of activity and remote work arrangements;
- Public confidence in the safety of public transit will factor into decisions to return to transit for customers with access to alternative modes;
- There is evidence that customers most reliant on the TTC are from some of Toronto's lower income and most vulnerable communities;
- As ridership increases, the current capacity of the system will make physical distancing guidelines difficult to meet; and
- Ridership and revenues are not expected to recover to pre-COVID-19 levels by year end.

¹ <https://files.ontario.ca/mof-framework-for-reopening-our-province-en-2020-04-27.pdf>

The TTC's restart and recovery plan is flexible and scalable to an evolving environment. Anchored by a demand-responsive service plan, the TTC outlined 12 key actions to support recovery efforts guided by the following objectives:

- Safety of customers and employees first, the cornerstone of the TTC;
- Providing an essential service to support the economic recovery of the city and province;
- Providing an accessible and inclusive transit service;
- Ensuring critical assets and infrastructure are available to provide a safe and reliable service; and
- Planning for a “new normal” post-COVID in a fiscally constrained environment.

The TTC continues to work with the City of Toronto's Emergency Operations Centre (EOC) and Toronto Public Health to coordinate response to COVID-19 and prepare for a potential resurgence of COVID-19 in the fall. The following report provides an update to the Board on activities over the summer months, and projections and plans for COVID-19 response and recovery to year end and early 2021. Attachment 1 provides a summary update on each of the key actions reported to the Board in June 2020.

Comments

1. Health and Safety Measures

Transit agencies have taken critical measures to safeguard customers and employees, yet there have been questions surrounding the safety of public transit during the pandemic and its role, if any, in virus transmission. According to research from international sources, no direct correlation has yet to been found between the use of urban public transit and transmission of COVID-19. These studies indicate minimal risk from using public transit where specific safety measures such as the use of face coverings and masks, and well-functioning ventilation systems are in place². Several countries with extensive contact tracing programs have identified clusters of cases linked to workplaces, homeless shelters, gyms, bars, and clubs, but less than one per cent have been linked to public transportation.

When making comparisons to other enclosed settings like bars and restaurants, the benefits of riding transit are that transit users tend to stay on trains or buses for relatively short periods of time and often do not talk to others, thereby reducing the spread of airborne droplets. With face coverings or masks now mandatory on many transit systems, including TTC, the risk of virus transmission is further reduced.

According to Toronto Public Health (TPH), as of September 13, 2020, 57% of COVID-19 cases likely acquired their infection from close contact with a known case of COVID-19, 10% from health care, 7% from travel, and 3% from other institutions. There were 22% of cases that likely acquired their infection in the community, meaning there is no known source for their infection.

² <http://www.tstc.org/wp-content/uploads/2020/06/Back-on-Board.pdf>
https://www.apta.com/wp-content/uploads/APTA_Covid_Best_Practices_09.14.2020-1.pdf p. 4- 21

There have not been any cases clearly spread on public transit. It is difficult to determine exactly where someone acquired their infection in the community because the virus can be spread by persons who are not exhibiting symptoms. This becomes more challenging as many people begin to resume some of their usual activities in various community settings, including public transit, where others are present. TPH has also indicated that the potential risk of acquisition on public transit can change over time given changing ridership levels and the implementation of public health measures.

Regardless, the risk associated with riding transit is lower when precautions are taken. To that end, the TTC has implemented various safety measures during the response and restart phases of the pandemic, and will continue with them until year end at a minimum. As reported to the Board in June, this includes:

- Making masks/ face coverings mandatory on the TTC as of July 2, 2020;
- One-time distribution of up to one million non-medical masks in partnership with the City's Poverty Reduction Office to improve access to vulnerable communities;
- Enhanced station management (COVID-19 Ambassadors);
- Enhanced cleaning and disinfection of vehicles and stations;
- Making hand sanitizer available at TTC stations/ bus bays; on streetcars; and Wheel-Trans buses;
- Floor decals and stations markings to improve passenger traffic flows at fare lines, platforms and on vehicles;
- Vehicle seat decals to promote physical distance when possible, and reminding customers to wear a face covering or mask on the system;
- Operator PPE kits (gloves, disinfectant wipes, re-usable masks, hand sanitizer, and face shields);
- Operator fabric barriers; and
- Operator barriers/enclosures (Plexiglass for bus fleet, and plastic barrier on Wheel-Trans vehicles).

The TTC has also identified new enhanced measures to continue to support customer and employee safety, and in preparation for a potential resurgence of COVID-19. Enhanced measures include:

- Refreshed customer communications campaign reinforcing key messages related to safety on the system has been rolled out;
- PPE vending machines to support ongoing access to customers will be rolled out to targeted TTC stations commencing in October;
- Real-time customer crowding information will be published in the coming weeks to provide customers insight through various channels (i.e. third party apps and SMS text messaging);
- Effective September 17, 2020, the mandatory mask policy is expanded to include employees within areas designated for TTC personnel and not for public access (both indoors and outdoors), and to include employees within or behind a physical barrier or shield;

- Upgraded face masks (e.g. medical grade) will be provided to certain work groups;
- Increased frequency of physical distancing audits at critical work locations to ensure adherence to requirements;
- Enhanced active screening of TTC employees will be implemented at critical work locations which includes piloting of a remote COVID-19 Screening Application for employees; and
- Extending work-from-home policy for TTC employees able to work remotely until year end.

In addition to enhanced measures, the TTC continues to investigate other technology opportunities. The TTC recently engaged LTK Engineering Services, to conduct an industry and literature review to identify mitigation methodologies and technologies currently being implemented in transit in response to the pandemic. This study included a review of procedures and technologies being used to reduce the spread of viruses within transit systems through either surface or airborne transmission of the virus.

The report concluded that the TTC's current disinfection methods are in line with industry standards. Short term recommendations included steam for porous surfaces and a range of air treatment technologies. Long-term recommendations included designing vehicles with disinfection in mind (e.g. biocidal surfaces, longitudinal seating, and elimination of soft/porous surfaces). Currently, the TTC is piloting the following air treatment technologies for vehicle HVAC systems: higher efficiency filters (e.g. MERV 13); anti-viral filters; ultraviolet light (UVC); and photocatalytic oxidation. The TTC is also piloting steam cleaning for surface treatment of porous surfaces. Next steps include proceeding with detailed cost estimates, risk assessments and validation plans for the approaches that are being piloted.

At this time, the TTC intends to proceed with implementation of higher efficiency filters on revenue vehicles. The estimated cost of this initiative is \$3.3 million in addition to ongoing maintenance costs. Pending the conclusion of the pilots for the other technologies, there may be additional expenditures incurred in order to further enhance the safety of the system.

The TTC has also engaged LTK Engineering Services to conduct a Vehicle Air Flow Study to determine the impact of factors such as the effects of open-versus-closed windows and doors on vehicle HVAC performance and air flow patterns. This work is currently underway and information will be reported once available.

2. Service and Customer Experience

Transit Demand

At its meeting on June 17, 2020, the TTC Board received ridership forecasts associated with the expected re-start and recovery of the economy. The forecasts projected that system-wide ridership would recover to about 30% of normal ridership levels by Labour Day.

Throughout all stages of the reopening the TTC has seen an increase in ridership. From September 8, 2020 to September 11, 2020, system-wide average weekday revenue rides were 632,000, which is 37% compared to the first week of March (pre-COVID -19 baseline). System-wide ridership has outpaced the projections reported to the Board in June 2020.

As transit demand has increased, the TTC has recalled approximately 150 operators as of September 8, 2020. The table below outlines the percent of pre-COVID-19 boardings and service levels for the week ending September 11, 2020.

Table 3. Percentage of Pre-COVID-19 Boardings and Service Levels (as of September 11, 2020)				
Mode	Pre COVID (March 2 6)	Current (September 7 11)	% of Pre COVID Boardings	% of Pre COVID Service Level
Bus	1,381,000	675,000	49%	94%
Streetcar	350,000	135,000	39%	85%
Subway	1,492,000	500,000	34%	85%
Total	3,223,000	1,310,000	41%	92%

The TTC expects that ridership will continue to increase in fall 2020 and an additional 132 employees will be recalled from layoff on October 4, 2020 to support increasing demand for service. Based on ridership trends it is expected that fall 2020 ridership could be as low as 40% or as high as 60%. For the purpose of current financial projections an average of 45% of ridership through the fall is being assumed. This is based on the return of elementary and secondary schools, post-secondary institutions allowing limited on-campus activity, some employers rolling back work from home policies, and weather conditions impacting active transportation options.

At this time, it is difficult to predict if ridership levels will continue to increase into 2021 or flatten once the expected fall uptick stabilizes. Data to be collected during the fall season will be critical to establish meaningful predictions for the future. This includes the usual monitoring of ridership at both the system-wide level and by mode, as well as travel behaviour survey data from the public as it adjusts to a new level of “normal.” The TTC has partnered with the University of Toronto, the Ministry of Transportation, the City of Toronto and other regional municipalities in the GTA to administer a travel behaviour survey in the fall in order to provide key insights required to produce more reliable and precise projections for the duration of the pandemic.

Figure 2: Transit Demand Forecast

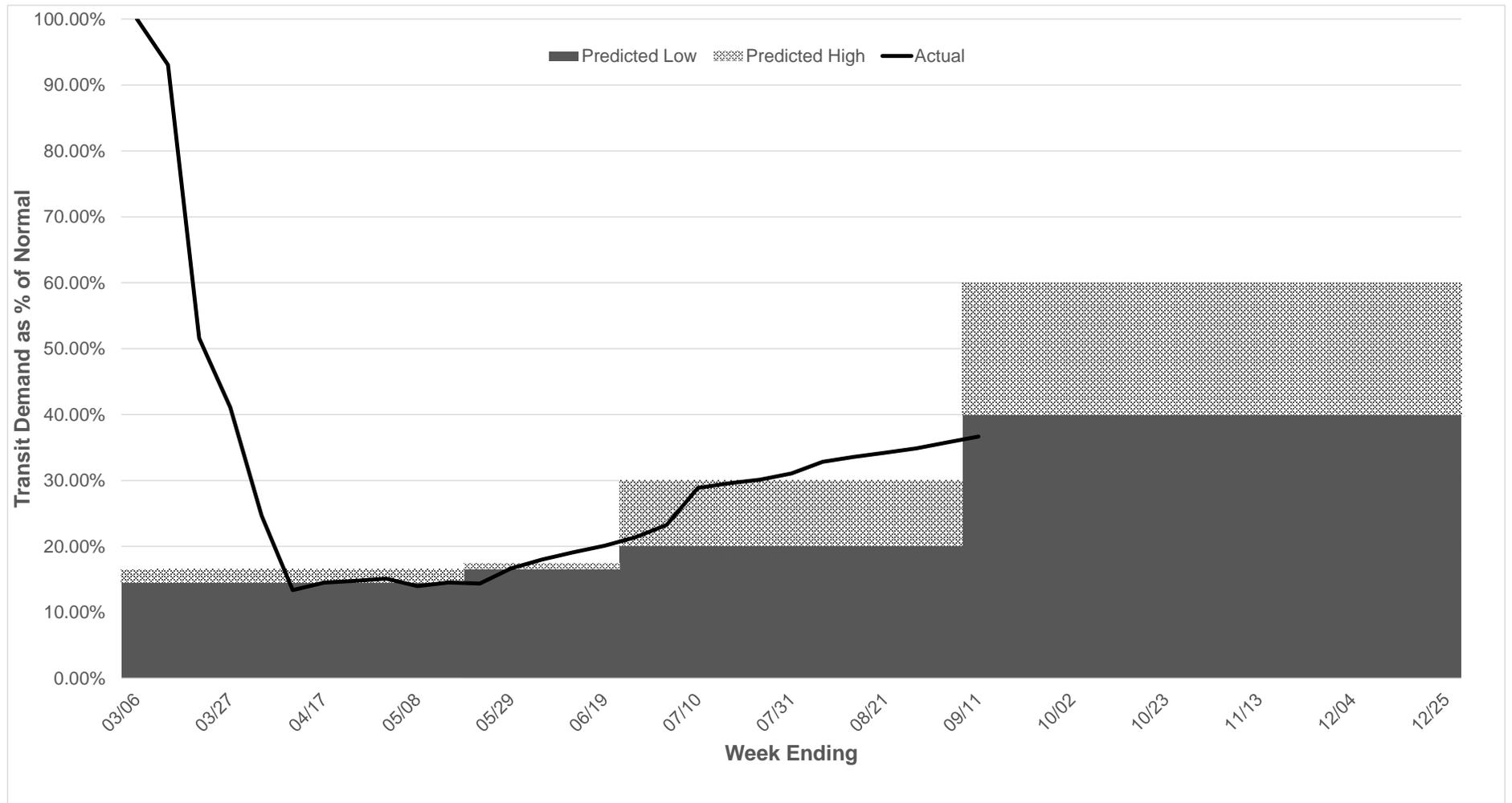
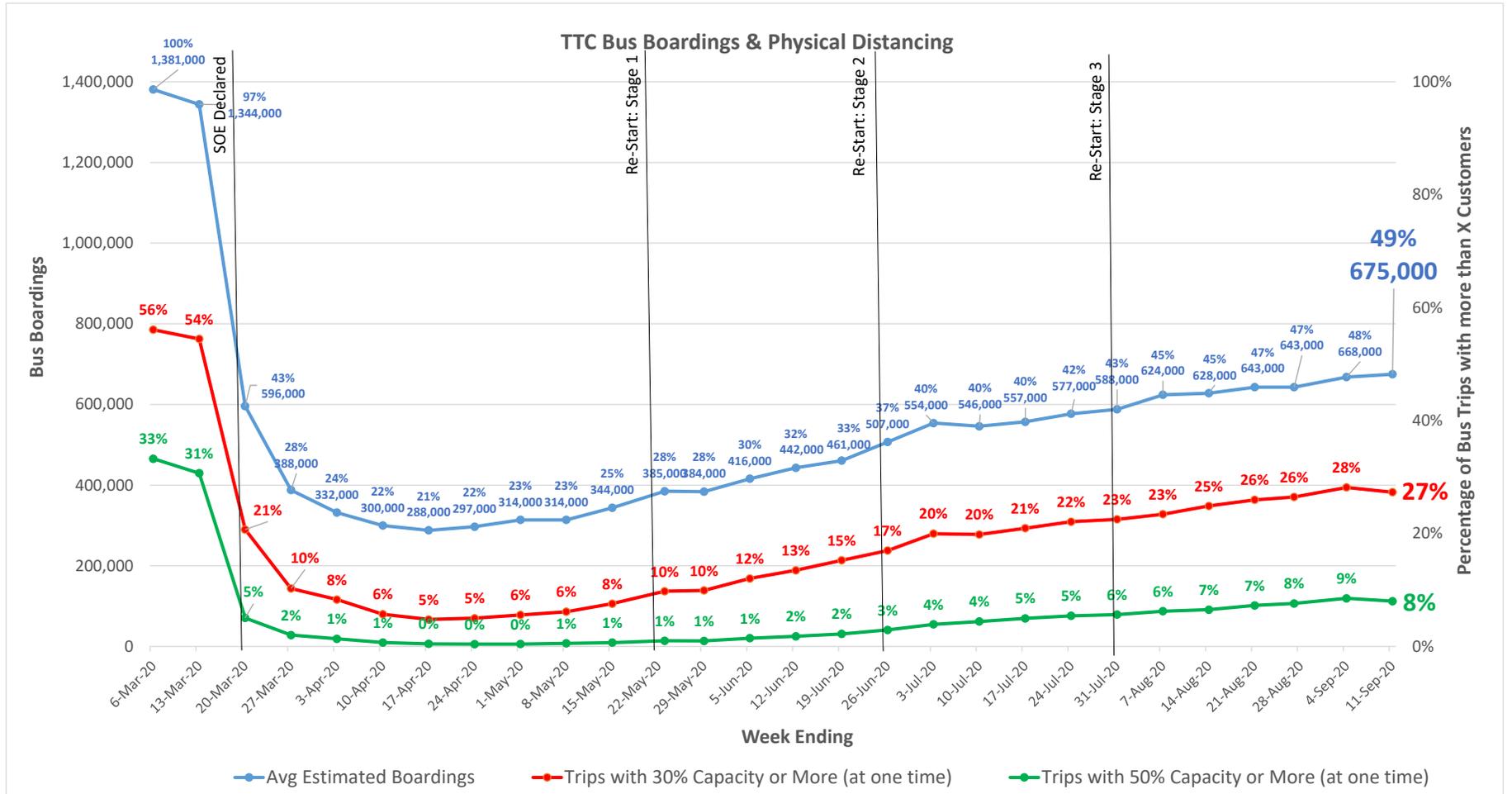


Figure 3: Bus Boardings & Crowding



2020 Service Plan

For the remainder of 2020, the TTC will continue to operate the demand-responsive service plan with some modifications as pre-COVID-19 service begins to be reintroduced on busy corridors, where warranted by demand. Overall, as a key objective, the TTC is focused on managing crowding. The TTC will implement the following initiatives to match capacity with demand:

- In September, the TTC is focusing on “back to school” and is working with post-secondary institutions and school boards closely. The TTC’s primary focus is on providing transit service to secondary schools. The additional operators returning from layoff as of September 8 are being dispatched to key locations to provide additional capacity when and where it is required based on enrollment data and school bell times.
- In October, the TTC will implement service improvements on the Eglinton East corridor to coincide with the introduction of bus rapid transit improvements. This includes the reintroduction of the 905 Eglinton East Express and 986 Scarborough Express. These service improvements are possible by reallocating resources from low performing routes to match capacity to demand.
- In November, the TTC will begin to increase local service and reintroduce other express services on busy high-ridership routes. This will be achieved by reducing the number of flexible demand-responsive buses and reinvesting those resources in regular scheduled service.

2021 Annual Service Plan

The 2021 Annual Service Plan (ASP) builds on the foundation of the 5-Year Service Plan and 10-Year Outlook (5YSP). The 2021 ASP provides an opportunity for the TTC to refine initiatives, address emerging priorities and reimagine and rebuild our mass transit network so that we can continue to move large volumes of customers safely, reliably, and swiftly across the city. Our emerging focus into the next year is to continue to respond to customers’ dynamic and evolving demand for public transit service.

The TTC is planning for service in 2021 to continue to be delivered at 2020 levels in order to match capacity to demand. Service initiatives and improvements that require additional resources will need to be made by reallocations within the network.

Key elements of the 2021 Annual Service Plan include:

- Demand-responsive service
 - Sustain some flexible service to respond dynamically to customer demand.
 - Ensure the TTC is ready for a possible resurgence of COVID-19.
- Regular scheduled service
 - Reduce crowding by allocating resources to where customer demand is greatest.
 - Address travel patterns by restructuring existing and introducing new services.

- Improve service reliability to reflect actual operating conditions as they evolve.
- Advance key strategic initiatives
 - Surface transit improvements (RapidTO).
 - Service and fare integration with neighbouring municipalities.
 - Automated transit shuttle and integrate microtransit services.

The 2021 Annual Service Plan builds upon the consultation process established in the 5YSP and consultations are underway. In July, the TTC conducted a customer preference survey to understand customers' perceptions of service quality, values and priorities. We learned that crowding has become significantly more important for TTC customers during the COVID-19 pandemic. Customers also prefer transit services that prioritize major corridors and operate with more express options.

In addition, the TTC is conducting multiple interactive online surveys to collect feedback on various service initiatives over the months of August and September. Online stakeholder meetings are being held in September and October to help refine the plans. Recognizing the importance of equity in transit planning, the TTC is also reaching audiences who are more impacted by transit crowding during COVID-19; who are typically under-represented in engagement processes; and who have a greater potential to be impacted by service planning decisions. The TTC will share information and seek feedback with these groups with dedicated approaches that will include partnering with youth engagement teams to become local champions. The 2021 Annual Service Plan will be presented to the TTC Board in late 2020.

Customer Experience through COVID-19

As the COVID-19 restart and recovery plan progresses, the TTC continues to actively engage customers. Since late March, the TTC has worked with Environics Research to conduct a series of surveys aimed at tracking the changing travel behaviours, attitudes and perceptions of customers during the pandemic. Survey findings have informed safety measures, communication efforts and ridership forecasting.

The June Board report featured the third wave survey results conducted in mid-May prior to Toronto entering Stage 1 of the Province's Reopening Framework. The wave four survey conducted in mid-July surveyed 2,028 TTC customers (those who take the TTC monthly or more often under typical circumstances i.e. pre - COVID-19). The results of the survey are summarized below:

- Satisfaction with the TTC's COVID-19 response remains high in wave four with 82% of customers reporting they are very or somewhat satisfied.
- More customers are using the TTC to commute to work (36%) compared to wave three (19%). With expanded social circles, 29% of customers are taking the TTC to visit family and friends, up from 8% in wave three.
- Similar to wave three, 71% of customers will feel safe taking the TTC under certain future circumstances, including when a vaccine becomes available (91%) and when there are no daily new cases in Ontario (85%).

- Customers have decreased their predicted number of monthly trips for September. The number of days customers expect to work from home once the state of emergency is lifted has increased in wave four of the survey.
- Customers are overwhelmingly in favour of the TTC’s mandatory face covering policy – 95% say they are likely to wear a face covering on their next trip.
- Customers rate face coverings as the top safety measure likely to increase their chances of taking the TTC.

Please see Attachment 3 for more information on wave four of the survey.

3. Wheel-Trans

Wheel-Trans Transportation has implemented a number of safety measures as reported in June of this year. A restart plan was outlined to ease measures in line with the Province’s and City’s reopening plans, and associated changes in ridership.

Transit demand as percentage of budgeted ridership is fairly consistent with the projections reported to the Board in June 2020, as outlined in Table 4. As of September 5, 2020, Wheel-Trans demand as a percentage of budgeted ridership is 39%.

Table 4. Wheel-Trans Ridership		
Timeframe	Original Projection Reported in June 2020	Actual & Projected Ridership
June 2020	17%	Actual: 20%
July to August 2020	25 - 35%	July actual: 28% August actual: 34.5%
September 2020	40 – 70%	As of Sept 5 Actual: 39% Monthly Projected: 40 - 50%
October to December 2020	40 – 70%	Projection: 50 – 70%

Since Toronto transitioned into Stage 2 and Stage 3 of Provincial reopening, customer trip frequency increased to shopping, recreation and work destinations. However, hospital visits continue to be the primary trip purpose for Wheel-Trans customers as shown in Table 5.

Table 5. Trip Purpose			
February 15 to March 16, 2020	March 17 to April 16, 2020	June 17 to July 14, 2020 (Stage 2 Reopening)	Aug 2 to Aug 29, 2020 (Stage 3 Reopening)
Personal: 43.7%	Hospital: 58.3%	Hospital: 52.4%	Hospital: 52.8%
Hospital: 29.7%	Personal: 24.7%	Personal: 19.3%	Personal: 13.9%
Shopping: 9.9%	Shopping: 11.4%	Shopping: 18%	Shopping: 20.2%
Recreation: 9.8%	Travel: 2.5%	Recreation: 3.9%	Recreation: 6.0%
Work: 3.2%	Recreation: 1.7%	Travel: 3.2%	Travel: 3.3%
School: 1.5%	Work: 1%	Work: 2.2%	Work: 2.6%
Nursing Homes: 1.2%	School: 0.3%	Nursing Homes: 0.8%	Nursing Homes: 0.9%
Travel: 1%	Nursing Homes: 0.2%	School: 0.2%	School: 0.2%
Clarifications: <ul style="list-style-type: none"> • Personal – unknown address/ unknown purpose • Recreation – parks, cross purpose buildings (e.g. Variety Village), convention centres, museums, theatres, libraries, sporting venues • Travel – Family of Services (e.g. subway stations), airports, regional transfer points 			

Wheel-Trans customers were surveyed in late June to gain insights on trip patterns and opinions about travelling on Wheel-Trans during the pandemic. Survey results indicated 15% of respondents had not used Wheel-Trans since the Province introduced emergency orders, while 68% decreased their usage. This is line with Wheel-Trans ridership levels. Customers using a mobility device were more likely to say that their Wheel-Trans usage stayed the same, which is expected since this customer group (29%) has a higher dependency on the service. Approximately 40% of respondents stated they did not feel safe using Wheel-Trans during the pandemic, and would feel safe when a vaccine/other medical treatment becomes available, or there is a consistent multi-week decrease in the number of new cases. A follow up survey will be conducted to continue to gather insights.

Wheel-Trans Key Recovery Milestones –Status Update

All actions outlined in the restart and recovery plan for Wheel-Trans in June have been implemented in accordance with the phased reopening by the Province:

- Essential trips are no longer suggested;
- Outbound screening calls for reoccurring trip were eliminated;
- Self-booking website with a screening questionnaire is open and available for occasional trip bookings; and
- Solo rides will continue for as long as possible, but limited ride sharing (with physical distancing) is anticipated to be introduced at the end of September/October and onward.

Originally, Customer Service call volumes were anticipated to increase to 3,000 from 800 calls per day later in the year. As of June 28, call volumes exceeded 1,500 – a trigger point to reopen the self-booking website on July 2. Since reopening, Wheel-Trans reservations handled approximately 1,000 calls per day, increasing to 1,300 in September 2020. This is still far below the average daily call volumes of 3,200 in 2019.

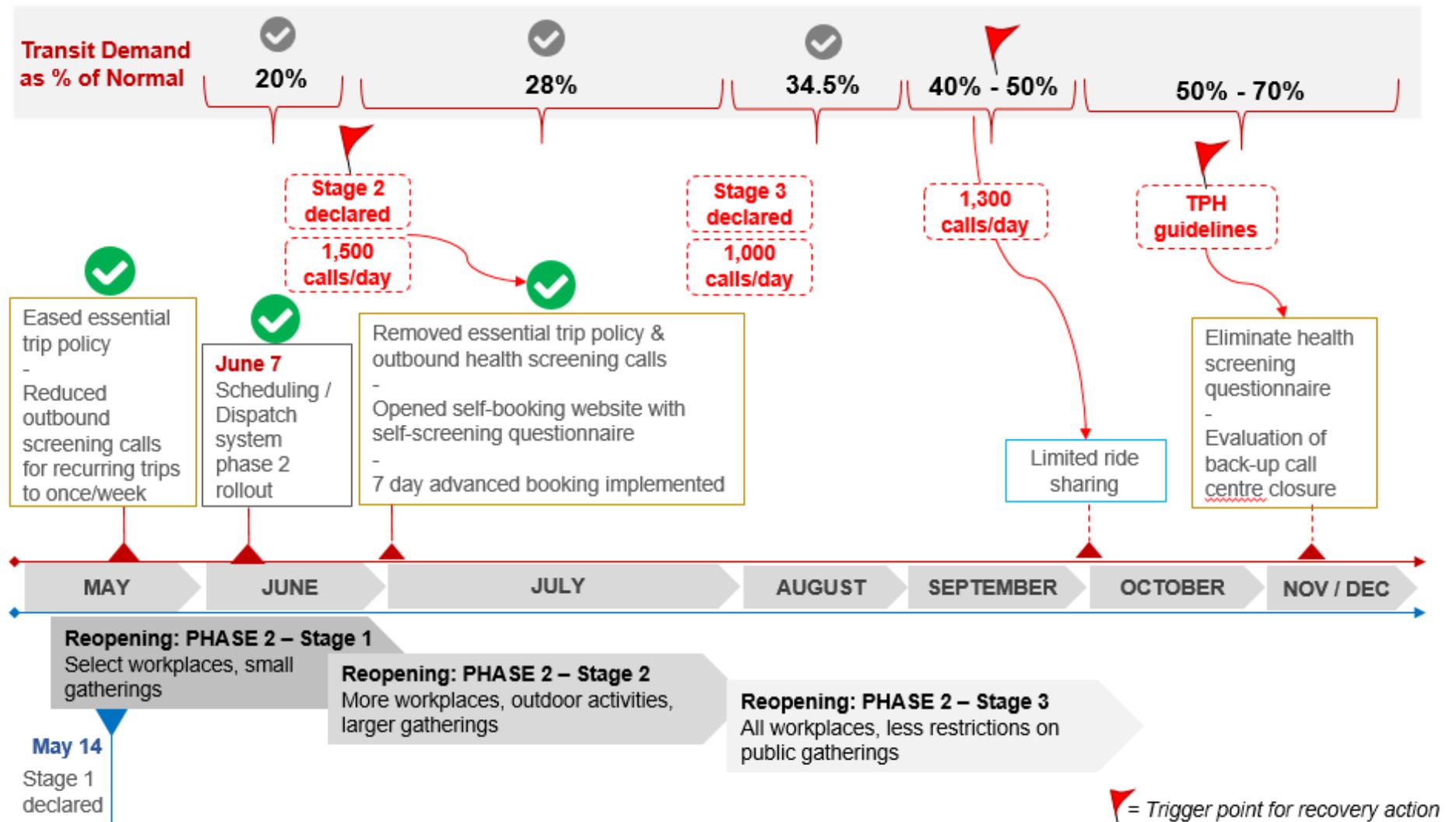
Figure 4 below provides an outline of Wheel-Trans recovery initiatives in relation to evolving demand.

Since the onset of the pandemic, a number of safety measures were implemented and gradually reversed as the province reopened through a phased approach. Should there be a resurgence of COVID-19, Wheel-Trans safety measures will be adjusted to match provincial guidelines and ridership levels:

- Service level reduction would occur in line with ridership levels and solo rides to be delivered based on demand levels of approximately 40% or below budgeted ridership;
- Essential trips would resume in accordance with public health guidelines; and
- The self-booking website would remain open with the screening questionnaire.

Wheel-Trans has the advantage of having direct access to customers in order to promptly communicate any changes to service delivery while ensuring a safe and smooth experience through a potential resurgence.

Figure 4: Wheel-Trans COVID-19 Recovery Key Milestones



3. Financial Outlook – Year End and Q1 2021

The total gross financial impact of COVID-19 is estimated to be approximately \$744.4 million by year end. After the application of the cost containment initiatives undertaken by the TTC, the net impact is estimated to be approximately \$589.5 million to year end.

These projections are based on the assumption that ridership levels average 45% of budget through the fall, which is up from 23% experienced at the end of June and 35% reached in August. An assumption is also being made for the first quarter of 2021, that a similar financial impact will be felt as the last quarter of 2020. In this scenario, the total gross financial impact between April 1, 2020 and March 31, 2021 could be approximately \$947.3 million.

Estimates will be updated as further information becomes available over the fall period with respect to changes in customer travel behaviour. The potential resurgence of COVID-19 in the fall may result in the Province reintroducing restrictions that will also have an impact on ridership demand.

Table 6. Estimated Gross Financial Impact of COVID to Year End (\$M)				
	Impact to April 1, 2020	April 1 to September 30, 2020	October 1 to December 31, 2020	Total
Conventional Transit	39.5	498.1	201.7	739.3
Wheel- Trans	0.3	3.8	1.1	5.2
Total	39.8	501.9	202.8	\$744.5

The above estimates are based on estimated passenger revenue losses and ancillary revenues losses, and incremental COVID-19 expenditures.

Passenger Revenue and Ancillary Revenue

Transit demand is expected to increase, with anticipated ridership levels projected to average 45% through the fall. Actual fall ridership will be particularly dependent on schools and daycares accommodating pre-pandemic levels of attendees, as well as working arrangements/commuting patterns.

Ancillary revenue variance is primarily due to commuter parking. Since the start of the pandemic, commuter parking revenue has been approximately 90% under budget. It is expected that commuter parking revenue will take longer to recover than passenger revenues. Lower advertising and rental income are also contributing to the expected variance for ancillary revenue.

Table 7. Estimated Passenger Revenue and Ancillary Revenue Loss to Year End (\$M)				
	Impact to April 1, 2020	April 1 to September 30, 2020	October 1 to December 31, 2020	Total
Conventional Transit	36.0	479.0	185.5	700.5
Wheel- Trans	0.3	3.5	1.1	4.9
Total	36.3	482.4	186.6	705.4

COVID-19 Expenditures

These estimates account for incremental expenses only including safety measures, equipment and supplies to protect employees and customers, enhanced vehicle and facility disinfection and overtime related to critical response activities.

Table 8. Estimated COVID Expenditures to Year End (\$M)				
	Impact to April 1, 2020	April 1 to September 30, 2020	October 1 to December 31, 2020	Total
Conventional Transit	3.5	19.1	16.2	38.8
Wheel- Trans	0.0	0.2	0.1	0.3
Total	3.5	19.4	16.4	39.1

TTC staff have identified additional COVID-19 recovery measures that may be required depending on the outcome of design review and testing. Costs for these additional measures are not factored into the estimates provided in this report. This includes measures such as air filtration technologies, steam cleaning of vehicle seats, and other measures that may be required or recommended by Medical Officers of Health or other government officials.

Cost Containment

The TTC has implemented a number of cost containment measures which include expenditure constraints, matching service capacity to demand and deferred implementation of new priorities. These initiatives are projected to result in \$154.9 million in savings against budget to year-end, and will be allocated first towards any impact not covered through the federal-provincial Safe Restart Agreement, such as impacts prior to April 1, 2020.

Estimates will be updated as further information becomes available over the fall period with respect to changes in customer travel behaviour. The potential resurgence of

COVID-19 in the fall may result in the Province reintroducing restrictions that will also have an impact on ridership demand.

Intergovernmental Funding

As requested by the Board, the TTC actively engaged senior levels of government to advise on the fiscal impact of COVID-19 on the TTC. Since the last report to the Board, the provincial and federal governments have announced intergovernmental funding programs targeted specifically to the public transit sector in order to address the fiscal impacts of COVID-19.

Municipal Transit Enhanced Cleaning (MTEC) Funding

The Province of Ontario has provided \$15 million to municipalities across Ontario to support enhanced cleaning of their public transit systems to help reduce the transmission of COVID-19. The City of Toronto has been given a maximum allocation of \$7.367 million for eligible cleaning costs incurred between April 1, 2020 and December 31, 2020. A transfer payment agreement is currently in development between the Ministry of Transportation and City of Toronto. The TTC will develop and submit a claim for eligible expenditures and expects to fully maximize available funding. Vehicle disinfecting costs alone are currently estimated to be \$9 million to year end.

Safe Restart Agreement – Transit Stream

The federal-provincial Safe Restart Agreement provides up to \$4 billion in one-time emergency assistance to Ontario municipalities to address financial pressures related to COVID-19. This includes up to \$2 billion specifically for municipal transit systems. The federal and provincial governments have each contributed 50% of the funding for public transit.

This new funding program is designed to address financial pressures resulting from reduced revenue and new expenses resulting from COVID-19. There are two phases of funding under the Safe Restart Agreement transit stream:

- Phase 1 – Immediate Relief Funding, addresses fiscal pressures incurred between April 1, 2020 and September 30, 2020. The City of Toronto’s allocation is \$404 million in funding for the TTC.
- Phase 2 – Ongoing Relief, is designed to fund ongoing financial pressures from October 1, 2020 to March 31, 2021. A Toronto allocation has not been specified for Phase 2, and municipalities will be required to demonstrate need to access funds.

Under Phase 2 of the Safe Restart Agreement transit stream, the Province has also outlined a number of policy objectives:

- “Ensuring and promoting the safety of public transit systems through the coordinated procurement of new safety materials;

- Requiring that the transit systems drive sustainability through innovation in route planning and technology, as well as reviewing municipal transit jurisdictions where there are upper and lower tier systems operating in the same areas; and
- Requiring that the GTHA municipalities work with the Province to make real progress on fare and service integration to provide rider benefits.”

The Province has outlined that in order to receive Phase 2 funding under the Safe Restart Agreement transit stream, the City of Toronto, and by extension the TTC, will be required to demonstrate participation and progress in the following areas:

- “Engage in consolidated procurement opportunities leveraging Metrolinx and other provincial procurement tools;
- Review the lowest performing bus routes and consider whether they may be better serviced by microtransit;
- Work with the Province and Metrolinx where appropriate to determine the feasibility of implementing microtransit options on viable routes;
- Participate in discussions with the Province on advancing fare and service integration; and
- Participate in discussions with the Province to optimize transit through new possible governance structures.”

The TTC in partnership with the City has engaged the Ministry of Transportation (MTO) on the details surrounding Phase 1 and Phase 2 of the Safe Restart Agreement. The focus of discussions to date has been on finalizing program details and requirements associated with the Phase 1 immediate relief funding. MTO has advised that municipalities will be engaged in the near term on the policy objectives identified as part of Phase 2, including the development of a Transfer Payment Agreement that will provide oversight to Phase 2 of the funding program.

Provincial and federal funding has the potential to offset a significant portion of TTC financial pressures to March 31, 2021. Funding program details and reporting requirements are in the process of being finalized by the Province. Further information on the funding program details currently available are summarized in Attachment 2.

The TTC will continue to provide regular updates to the Board on the response and recovery from COVID-19. The TTC will also continue to work with government partners to advocate for ongoing emergency funding post March 31, 2021 and the development of a sustainable funding model for public transit.

Contact

Betty Hasserjian, Chief Safety Officer (Acting)
Telephone: 416-393-4574, Email: betty.hasserjian@ttc.ca

Mark Mis, Head, Service Planning & Scheduling
Telephone: 416-393-4275, Email: mark.mis@ttc.ca

Karen Thorburn, Head, Corporate Initiatives
Telephone: 416-981-1122, Email: karen.thorburn@ttc.ca

Signature

Richard J. Leary
Chief Executive Officer

Attachments

Attachment 1 – TTC's Restart Action Plan Status Update
Attachment 2 – Intergovernmental Funding Programs
Attachment 3 – Environics Wave 4 Customer Survey

Attachment 1: TTC's Restart Action Plan Status Update

Key Actions	Status Update
<p>1. Continue Implementation of the Demand-Responsive Service Plan:</p> <ul style="list-style-type: none"> • Provide 85 percent normal service and Run-As-Directed (RADs) buses to enhance service to specific routes with higher demand and observed crowding; • As ridership reaches 50 percent of normal demand, the TTC will begin to phase back to 100 percent of service hours. 	<p>See Section 2 in report.</p> <ul style="list-style-type: none"> • This service plan has been continued throughout the summer, as described. • A modified version of the plan has been introduced in September, to address back to school issues. The plan will continue to be changed throughout the fall, as required. • A return to 100 percent of service is anticipated for early 2021.
<p>2. Continue health and safety measures put in place to contain the spread of COVID-19 during response phase:</p> <ul style="list-style-type: none"> • Equipped buses with operator barriers/enclosures; • Enhanced cleaning and disinfection schedules of all public places, stations and vehicles with a focus on touch and grab points, such as buttons, railings, handles and straps; • Placed decals throughout system for distancing and reminders of need to wear face coverings; • Installed hand sanitizer in all subway stations, exploring installation in buses and streetcars; • Provided PPE kits to operators; and • Exploring innovative solutions/technology to make our system safer. 	<p>See Section 1 in report.</p> <ul style="list-style-type: none"> • Implemented measures identified in June Board report; • Undertook additional research on technologies (LTK Engineering Review) including Vehicle Air Flow Study; • Enhanced measures also being introduced to support employee and passenger safety and to prepare for a resurgence of COVID in the fall. This includes introducing PPE vending machines, real-time customer crowding information via third party apps; enhanced active screening of TTC employees, etc.
<p>3. Effective July 2, 2020, face coverings become mandatory for customers on the TTC, with some exceptions.</p> <ul style="list-style-type: none"> • One-time distribution of one million disposable non-medical masks in select areas of the system with a focus on neighbourhood improvement areas. 	<p>As of August 21, TTC traffic checkers have observed 96% face covering compliance on conventional service and 80% on Wheel Trans.</p> <p>The 1 million non-medical masks are being distributed in a three phased approach:</p> <ul style="list-style-type: none"> • Distribution to TTC Customers through a partnership with the City's Poverty Reduction Office. Approximately 500,000 masks have been distributed.

Key Actions	Status Update
	<ul style="list-style-type: none"> • Distribution to TTC Customers by Stations Staff and Wheel Trans Operators. Approximately 350,000 masks distributed • Back to School Campaign: 100,000 masks are being distributed in September and October to raise awareness of mandatory face covering compliance among riders returning coinciding with the resumption of school
<p>4. Continue rollout of Customer Education and Awareness Campaign:</p> <ul style="list-style-type: none"> • Campaign to focus on restart and recovery, including messaging on mandatory face coverings and health and safety measures in the system. 	<ul style="list-style-type: none"> • Completed and installed a full advertising campaign in May – print on all vehicles and stations as well as digital support on TTC screens, web and social media channels. Messaging includes TTC cleanliness, mandatory masks, hand washing and stay home if sick. • Completed and installed vinyl signage in all stations including mandatory mask use, elevator/stairs/escalator use in July/August • Back-to-school campaign underway. Includes print and digital advertising in local and ethnic newspapers/websites. <p>A refreshed customer communications campaign is fully developed for print and digital formats.</p> <ul style="list-style-type: none"> • Timing for release is reliant on timing of possible resurgence of COVID. • Print ads detailing how to properly wear a mask rolled out on all buses (Sept 16) • Digital advertising is ongoing on TTC screens and social media channels – TTC cleanliness, mask use, etc.

Key Actions	Status Update
<p>5. Proactive outreach to Key Sector Stakeholders:</p> <ul style="list-style-type: none"> • Implement the Engagement Strategy to proactively outreach to more than 1,000 public and private stakeholders to share information on riding the TTC safely. 	<ul style="list-style-type: none"> • In addition to TTC Board and City Councillor updates, stakeholder updates with specific details regarding TTC’s safety actions and policies have been issued on May 21, June 18, June 29 and July 31, September 9 and September 15. • Stakeholders include but are not limited to: Post-Secondary Institutions; School Boards; BIAs and major employers; Tourist destinations and event centres; Resident/Community Groups and Associations; Equity seeking organizations; Hospitals; and City and 3rd party agencies
<p>6. Enhanced Customer Flow and Stations Management throughout in case of delays or emergency:</p> <ul style="list-style-type: none"> • Station crowding plans to include setting fare gates to ‘exit only’; shutting down escalators; deploying shuttle buses; • Adding COVID-19 Ambassadors to busiest stations and key bus and streetcar platforms to assist customers, manage customer movement, assist in diversions, unplanned events; and • Stations to be equipped with floor markings and directional arrows to help direct customer movement. 	<ul style="list-style-type: none"> • COVID-19 Ambassadors were on-boarded and in place assisting with crowd management in stations, assisting customers, distributing masks, assisting in diversions, supporting management of unplanned events, supporting staff COVID-19 wellness screening • COVID-19 station floor markings installed at 75 stations (one way traffic flow directional markings, physical distancing markings on platforms, elevator physical distancing marking)
<p>7. Effective July 2, 2020, resume front-door boarding and alighting on buses and acceptance of cash, tickets and tokens, while continuing rear-door boarding.</p>	<ul style="list-style-type: none"> • Implemented on schedule.
<p>8. Encourage contactless payment methods through targeted complimentary PRESTO card giveaway.</p>	<p>PRESTO card giveaway being implemented in two phases.</p> <ul style="list-style-type: none"> • Approximately 20,000 cards distributed by Revenue Protection staff this summer at key stations, routes, and stops, focusing on areas with low PRESTO usage, and neighbourhood improvement areas. • Second phase this fall will see approximately 80,000 cards distributed via Toronto Public Library branches and various City of Toronto social service agencies and partners.

Key Actions	Status Update
<p>9. From June to September 2020, focus Wheel-Trans Recovery on main points:</p> <ul style="list-style-type: none"> • Ease and eventually remove essential trips policy; • Open self-booking website with health screen questionnaire; • Resume trip bookings up to seven days in advance; and • Potential resumption of limited ride sharing. 	<p>See section 3 of report. All recovery actions presented in June have been implemented in accordance with phased reopening:</p> <ul style="list-style-type: none"> • Essential trips are no longer suggested; • Outbound screening calls for reoccurring trip were eliminated; • Self-booking website with a screening questionnaire is open and available for occasional trip bookings.
<p>10. Continue work from home for TTC employees able to do so until Labour Day:</p> <ul style="list-style-type: none"> • Focus on safety and well-being of employees at home; • Undertake office space assessment for returning employees; and • Continue ongoing, timely communication to employees. 	<ul style="list-style-type: none"> • The TTC has extended the work from home policy for TTC employees able to do so until at least year-end. • Office space assessments continue to take place and multiple control measures (e.g. maximum capacity thresholds) are being established and implemented across specific work sites. • Corporate communication channels have been used to target communications to impacted employees (i.e. roughly 10%) rather than broadly across the organization. Communications have been occurring in a prompt fashion so as to give employees as much notice as possible on any changes in direction.
<p>11. Accelerate the State of Good Repair and Capital Program through early closures of subway and full closures of targeted stations:</p> <ul style="list-style-type: none"> • Advance additional asset maintenance and SOGR work plan for 2020; • Close Chester Station from June 9-23 to accelerate completion of Easier Access elevators. Additional stations targeted throughout 2020. 	<p>Advanced State of Good Repair Program:</p> <ul style="list-style-type: none"> • Completed the structural rehabilitation of North York Centre platform six months earlier than scheduled • Increased signals maintenance activities by approx. 20% in June • Increased tunnel leak repairs by 25% as of July 31 • Removed 19,000 sq. ft. of asbestos as of June 2020; 126% of what was completed in 2019 • Completed targeted Broadview special track work two months ahead of schedule • Completed 120% of 2020 targeted switch machine replacement • Completed Finch Station wall panelling work six months <p>Easier Access Program:</p>

Key Actions	Status Update
	<ul style="list-style-type: none"> • Since our Easier Access Phase III Project Status Report given at July Board meeting, Wellesley and Chester have now become the 47th and 48th Accessible Stations on TTC network. • Dupont, Wilson, Runnymede and Bay stations are planned to be Accessible by the end of 2020
<p>12. Provide time-limited financial relief recognizing financial hardship experienced by customers and independent TTC retailers.</p> <ul style="list-style-type: none"> • Pro-rated Credit for March and April monthly passes; • Rent deferrals for independent retail tenants. 	<p>Refunds for March and April TTC passes: 206,000 total March or April refunds eligible As of September 4:</p> <ul style="list-style-type: none"> • 134,000 refunds (65%) have been loaded to the PRESTO system and are available to customers. 110,000 of those 134,000 have already been picked up as customers tap their cards on the system, or at Shoppers Drug Mart. Approximately 82% of the available refunds have been picked up; or 53% of the total refunds to be made available. • The remaining 72,000 refunds will be loaded to the system in the coming weeks. • Limitations in the PRESTO system mean that all 206,000 refunds couldn't be loaded at once. They have instead been loaded in batches of about 40,000, with priority given to cards known to be still active on our system. <p>Rent deferrals offered for independent retail tenants.</p> <ul style="list-style-type: none"> • The TTC is following City of Toronto policy on rent deferrals. Staff continue to meet with tenants to determine payback schedules. • Tenants contacted to date have indicated that a payment schedule may pose an undue hardship. With subway ridership at approximately 31 percent of pre-COVID levels, our tenants' sales numbers have declined significantly. A full report to the Board will be delivered in November.

Attachment 2: Intergovernmental Funding Programs

Program	Allocation	Key Program Details
<p>Safe Restart Agreement Transit Stream</p> <p>Phase 1- Immediate Relief</p> <p>The funding program is designed to address financial pressures resulting from reduced revenue and new expenses resulting from COVID-19.</p>	<p>\$404 million to City of Toronto</p> <p>\$666 million is the total funding envelope for Ontario municipalities with transit systems. Funding was allocated based on ridership.</p>	<p><i>Eligibility:</i></p> <ul style="list-style-type: none"> • COVID-19 municipal transit pressures incurred April 1, 2020 to September 30, 2020. • Reduced revenue includes pressures related to farebox, advertising, parking, and contracts. • New COVID-19 expenses such as cleaning costs, new contracts, labour costs, driver protection, passenger protection, and other capital costs. <p><i>Payment and Reporting:</i></p> <ul style="list-style-type: none"> • Phase 1 payment in September 2020 to City of Toronto. • City/TTC to report to Province by October 30, 2020 with details on use of Phase 1 funds and a forecast of eligible expenditures to March 31, 2021. • If funding allocated in Phase 1 exceeds eligible costs the City must put excess funds into a reserve account. If Phase 1 funding is not sufficient, the City/TTC is required to outline the need for additional funding in advance of Phase 2 reporting. <p><i>Current Status:</i> Province is finalizing program guidance and reporting templates for municipalities.</p>
<p>Safe Restart Agreement Transit Stream</p> <p>Phase 2 - Ongoing Support</p> <p>(Provincial /Federal)</p>	<p>Toronto allocation to be confirmed.</p> <p>\$1,334 million is the total funding envelope for Ontario municipalities with transit systems.</p>	<p><i>Eligibility:</i></p> <ul style="list-style-type: none"> • COVID-19 municipal transit pressures incurred October 1, 2020 to March 31, 2021. • See above description of eligible transit pressures in Phase 1. <p><i>Payment and Reporting:</i> Funding in Phase 2 will be governed by a Transfer Payment Agreement (TPA) with the City of Toronto.</p>

Program	Allocation	Key Program Details
<p>The funding program is designed to address financial pressures resulting from reduced revenue and new expenses resulting from COVID-19.</p>	<p>Reported impacts will determine funding allocations in Phase 2.</p>	<p><i>Current Status:</i> Ministry will consult municipalities in fall 2020 on TPAs and the specific requirements MTO is seeking to meet provincial transit objectives to promote ridership growth and transit sustainability.</p>
<p>Municipal Transit Enhanced Cleaning Fund (MTEC)</p> <p>The provincial funding program is designed to support enhanced cleaning of municipal public transit systems.</p>	<p>\$7.367 M for Toronto</p> <p>\$15 M allocated to 110 municipalities based on modified Provincial Gas Tax formula.</p>	<p><i>Eligible Costs:</i></p> <ul style="list-style-type: none"> • Direct costs incurred between April 1st and December 31, 2020. • Costs reasonably incurred for the enhanced cleaning of transit vehicles and any other public and non-public facing transit assets, that provide or support transit services. May include the cost of cleaning materials; hand sanitizer for passenger and staff use; safety wear associated with enhanced cleaning; equipment purchased to support enhanced cleaning; cost of contracted services/salaries of redeployed staff to undertake enhanced cleaning. <p><i>Payment and Reporting:</i></p> <ul style="list-style-type: none"> • MTEC funding will flow through a Transfer Payment Agreement with the City of Toronto. • Payments based on one-time claim for eligible expenditures.

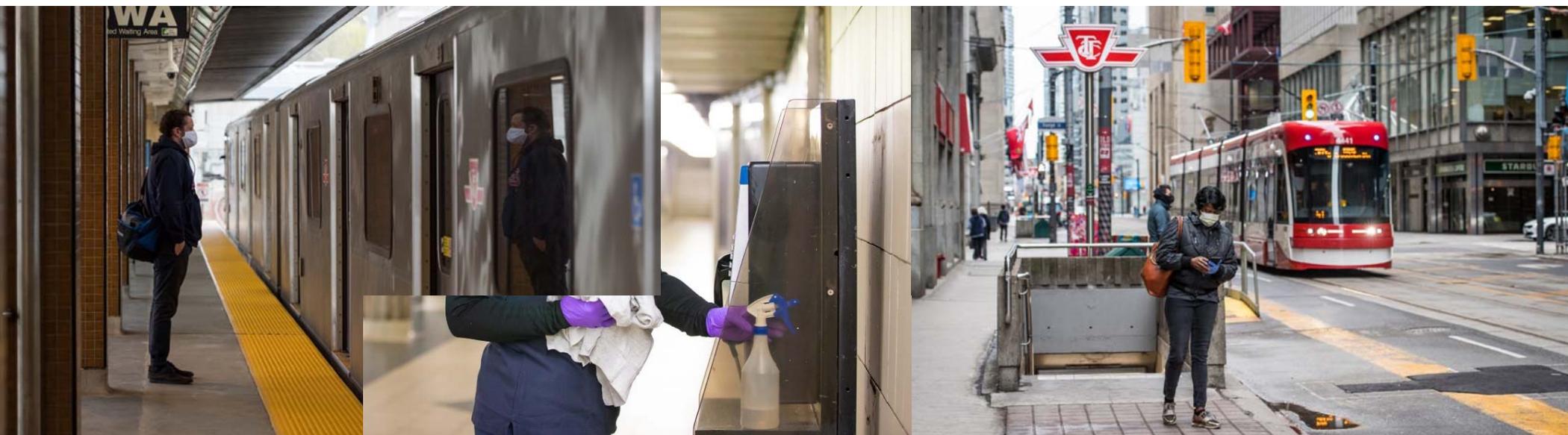


ENVIRONICS
RESEARCH

COVID-19 pandemic response survey

Wave 4 summary report

July 27, 2020



Introduction

Since late March 2020, the TTC has partnered with Environics Research to conduct a series of customer surveys. These surveys are aimed at tracking the changing travel behaviours, attitudes and perceptions of customers during the pandemic. Findings from the surveys have informed safety measures, communication efforts, and ridership forecasting as the provincial economy reopens.



| Methodology

Respondents Toronto residents aged 15+ who were TTC customers* prior to the COVID-19 emergency. Total Wave 4 interviews: n=2,028

Method Members of market research panels were contacted via email with an opt-in link to the online survey. This short survey was available in mobile and desktop versions.

Timing

- Wave 1:** March 28 – 29: n=1,129
- Wave 2:** April 4 – 5: n=512
- Wave 3:** May 15 – 20: n=2,004
- Wave 4:** July 10 – 15: n=2,028



More customers are using the TTC to commute and visit friends and family

	Wave 3 May 15-20	Wave 4 July 10-15 (Stage 2 Reopening)
<i>Base</i>	1,377	1,571
To run essential personal errands (e.g. grocery store, doctor's office, etc.)	58%	59%
Commuting to work	19%	36%▲
Visiting friends or family	8%	29%▲
Entertainment, recreation	n/a	26%
Dining at a bar/restaurant	n/a	14%
To travel to a daycare or other childcare service	n/a	2%
Other	25%	10%▼

Significantly higher/lower than Wave 3 ▲▼



Fewer Torontonians are abstaining from taking the TTC

How has your usage of the TTC changed since the declaration of a state of emergency in Ontario due to COVID-19?

	Wave 1/2	Wave 3	Wave 4
I no longer take the TTC	28%	31%	23% ▼
Decreased significantly	48%	47%	52% ▲
Decreased somewhat	14%	10%	13%
Stayed the same	10%	11%	12%
Increased	1%	1%	1%



▲▼ Significantly higher/lower than Wave 3



Rider feelings of safety remain consistent wave-to-wave while confidence in physical distancing declines

 Significantly higher/lower wave-over-wave performance at 95% confidence


% Strongly/Somewhat Agree

Base: Those who are riding the TTC (2 times or more in the previous 30 days)

	Wave 1 March 28-29 <i>n=1,129</i>	Wave 2 April 4-5 <i>n=512</i>	Wave 3 May 15-20 <i>n=738</i>	Wave 4 July 10-15 <i>n=984</i>
I feel it is safe to ride the TTC at this time	44	44	62 	65
I am confident that I can practice physical distancing while on board TTC vehicles or within TTC stations	44	49	64 	59 



Customers overwhelmingly in favour of face coverings on the TTC

95%

Support the TTC's decision to implement mandatory face coverings.

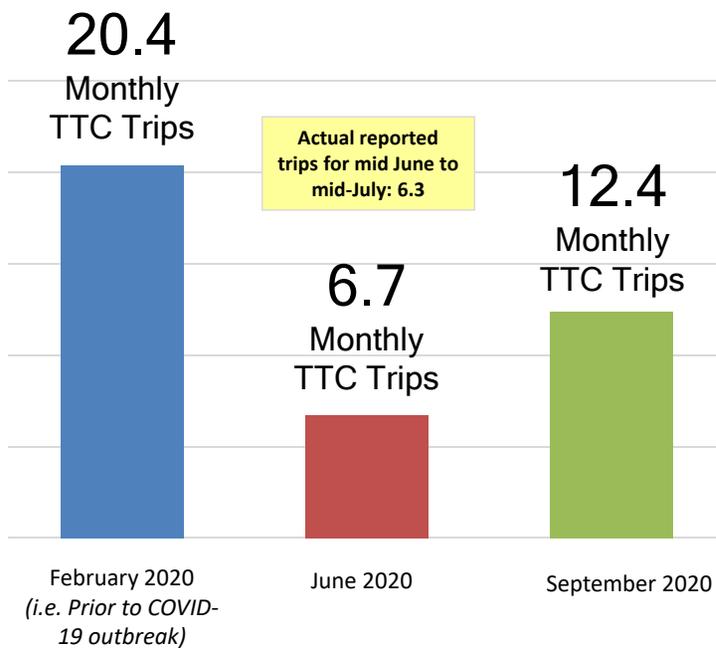
95%

Are likely to wear a face covering the next time they ride the TTC.

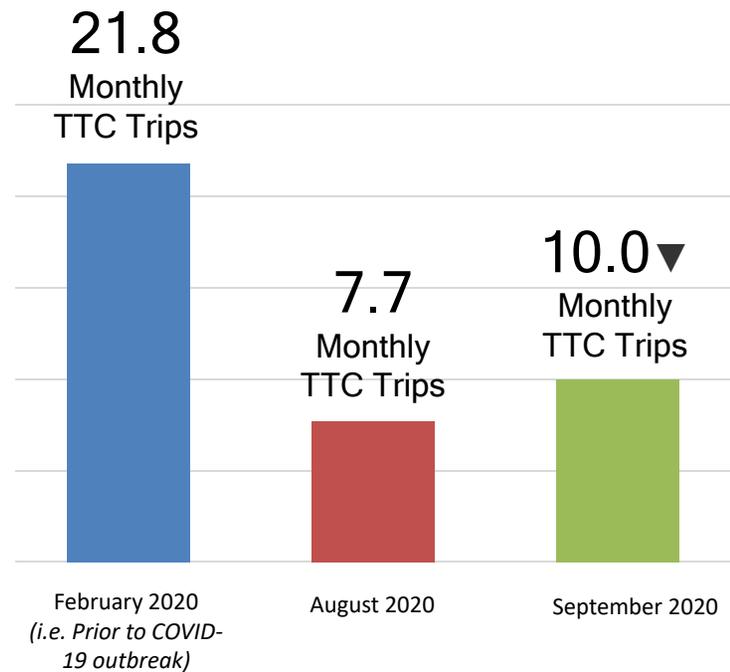


Customers have decreased their predicted trips for September 2020

Wave 3
May 15-20



Wave 4
July 10-15

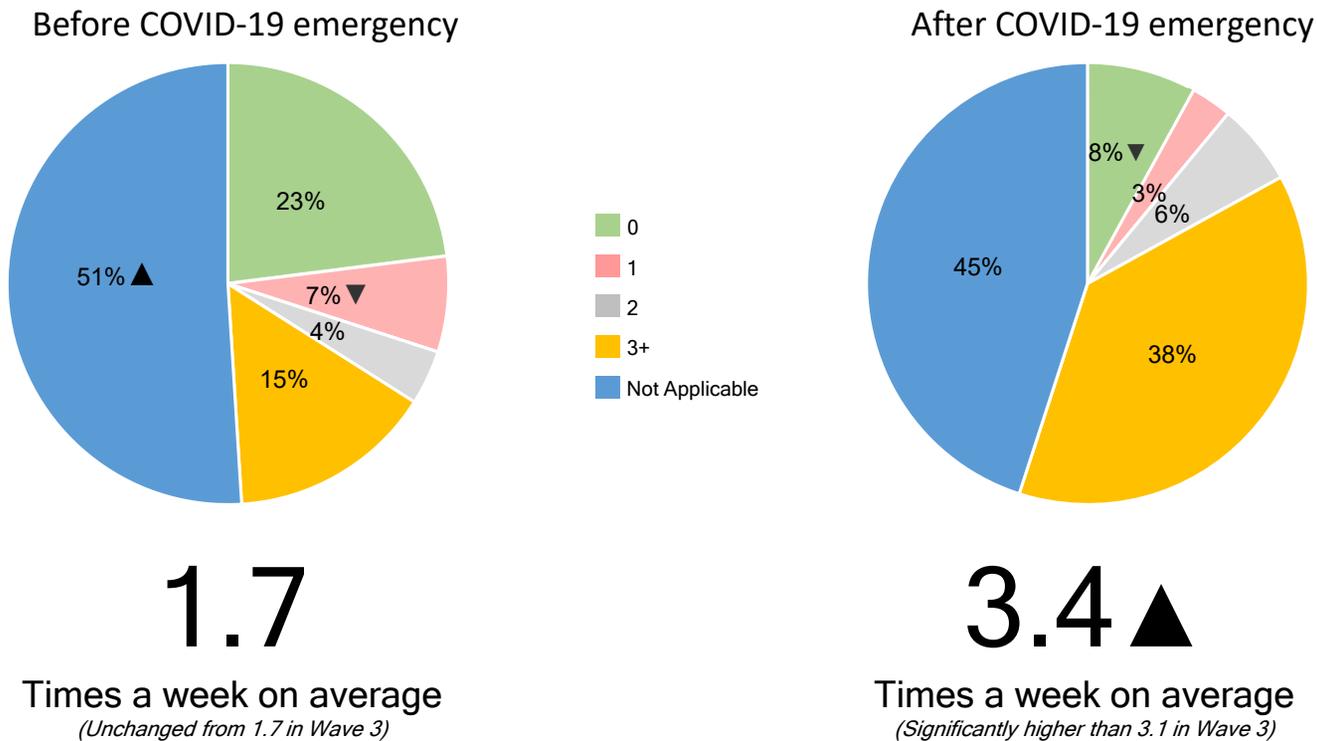


▲▼ Significantly higher/lower than Wave 3

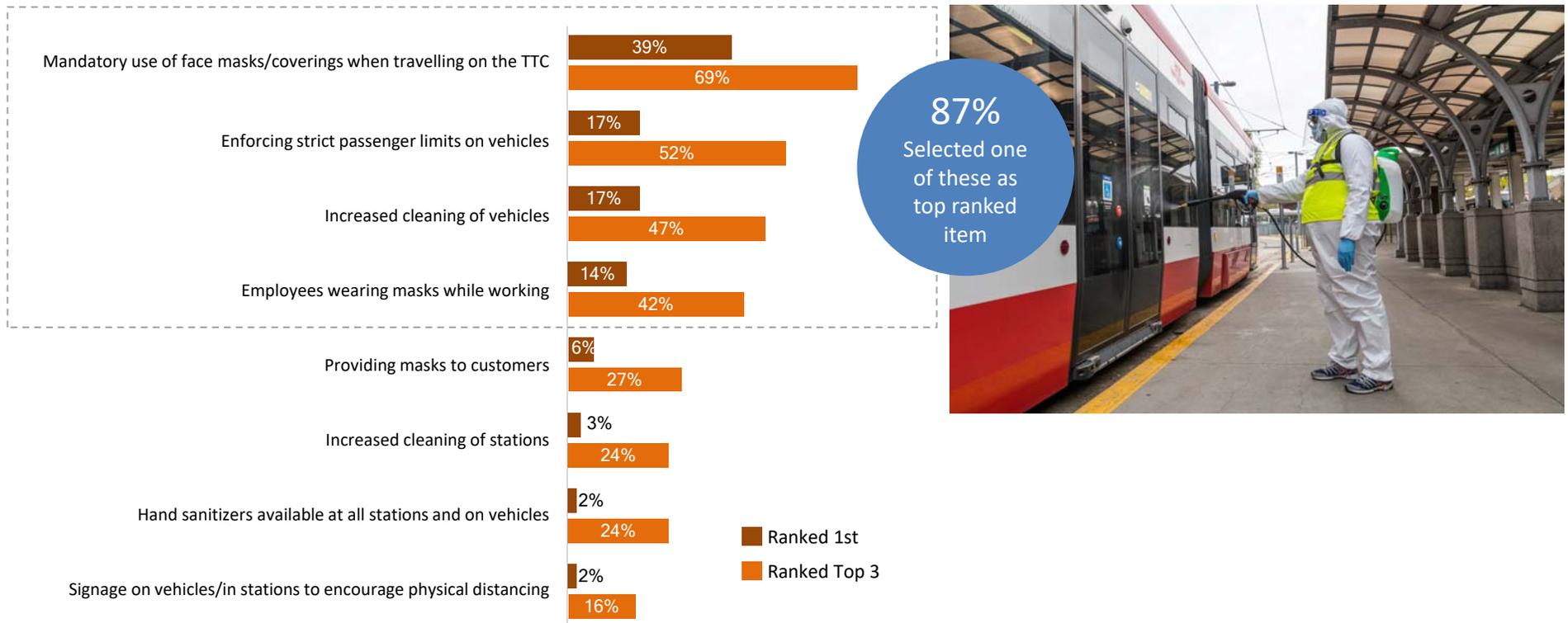
8 Q14C. Even though it may be very difficult to estimate, if you had to guess, how many trips did you/would you take on the TTC in the following timeframes? (W4: n=2,028; W3: n=2,004) Averages include zero.



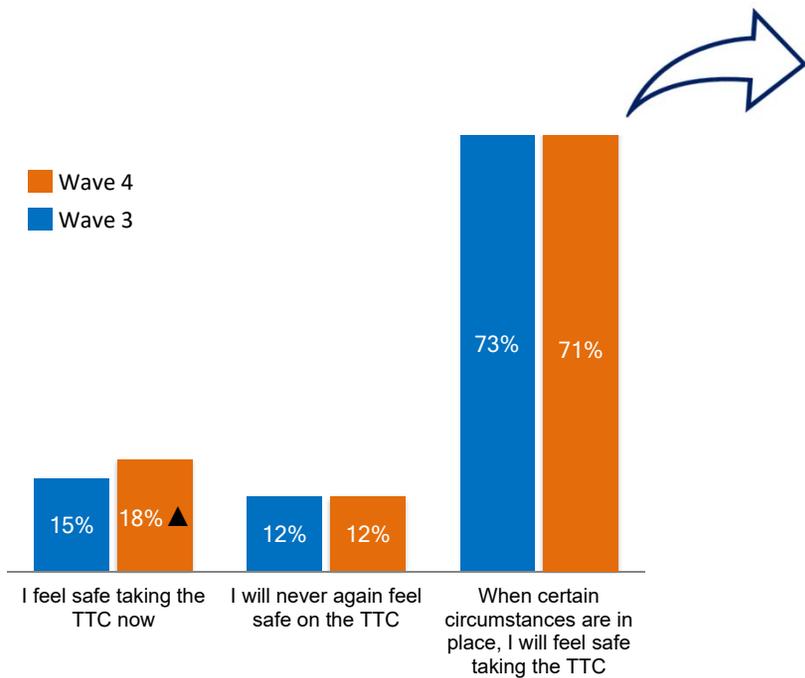
Workers expecting to work from home more often after the emergency compared to last wave



Mandatory face covering use is the top ranked safety measure to increase a customer's likelihood of taking the TTC



71% of customers will feel safe riding the TTC under certain future circumstances



I will feel safe to ride the TTC when the following are in place...

	Base	Wave 3 1,470	Wave 4 1,432
When a vaccine or other medical treatment becomes available		92%	91%
When there is a consistent multi-week decrease in the number of new COVID-19 cases		76%	n/a
When there are zero daily new cases in Ontario		n/a	85%
When all non-essential businesses including office settings are open		56%	42% ▼

▲▼ Significantly higher/lower than Wave 3



Satisfaction with the TTC's COVID-19 response remains high in wave 4

% Very/Somewhat satisfied

Base: Those who are riding the TTC (2 times or more in the previous 30 days)

 Significantly higher/lower wave-over-wave performance


	Wave 1 March 28-29 <i>n=1,129</i>	Wave 2 April 4-5 <i>n=512</i>	Wave 3 May 15-20 <i>n=738</i>	Wave 4 July 10-15 <i>n=984</i>
Overall response to COVID-19	67	70	85	82
The TTC's implementation of a mandatory mask or face covering use policy	n/a	n/a	n/a	80
The TTC's communication of safety information	62	66	76	76
The safety measures implemented to protect TTC employees	64	72	79	78
The speed with the TTC has enacted changes to respond to the pandemic	62	67	73	72
The safety measures implemented to protect TTC riders	58	67	76	74
The TTC's communication of route and schedule changes	59	64	71	68
The TTC's communication of changes to fare policy (monthly pass refunds, etc.)	56	59	62	59



Current rider satisfaction with last trip

Among those still riding the TTC (at least 2 times in the previous 30 days), overall satisfaction with last trip has dipped slightly from the Q4 pre-pandemic benchmark, but has remained steady during the COVID-19 pandemic.

Satisfaction with overall service on last trip
(Measured on 10-pt scale, where 10 is Extremely Satisfied)

7.9

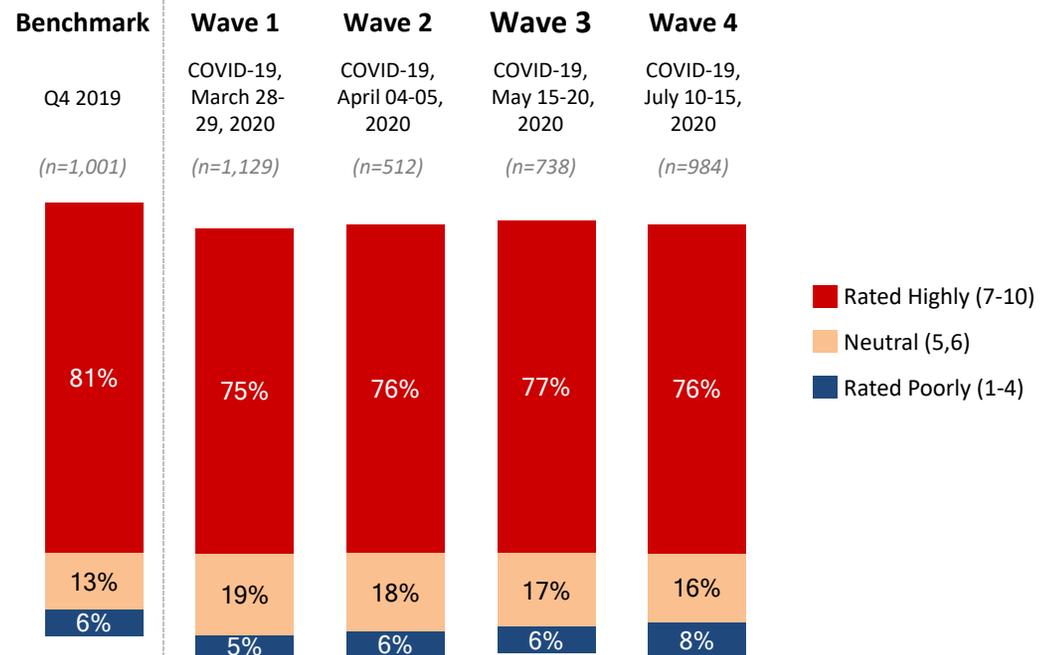
Benchmark
Q4, 2019

(n=1,001)

7.4

COVID-19
Phase 2 Reopening
July 10-15th

(n=984)



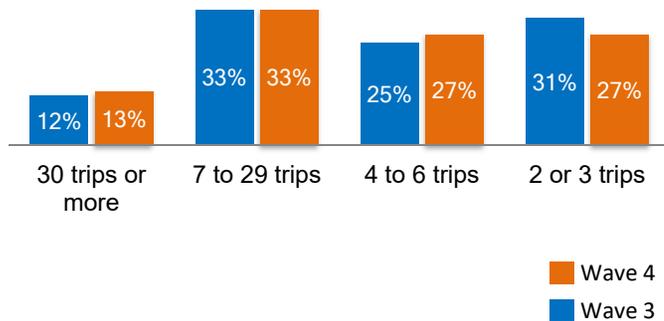
▲▼ Significantly higher/lower than Wave 3



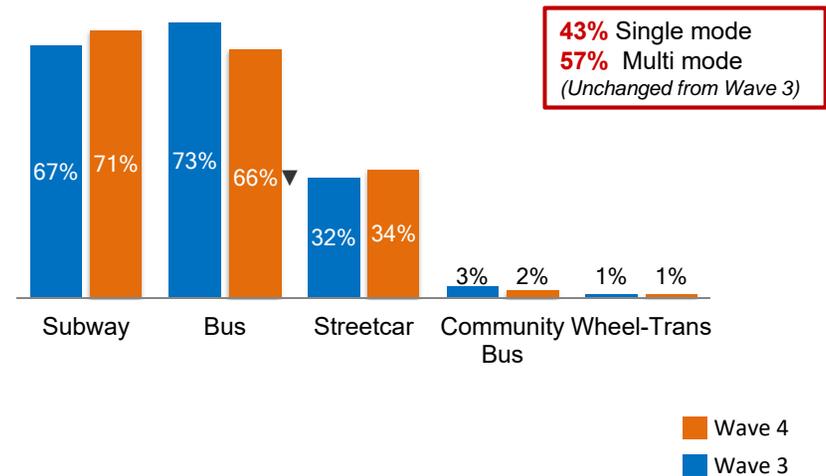
Respondent behavioural profile



Frequency of TTC Usage Past Month



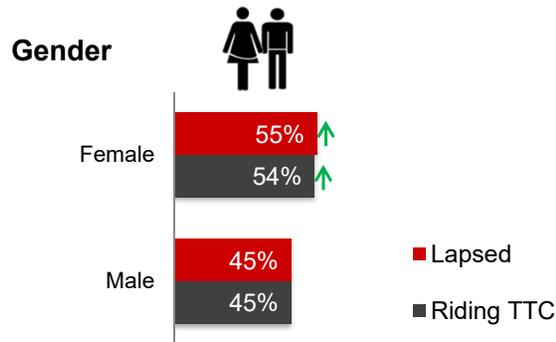
Mode of Transportation on Most Recent TTC Trip (any vehicle taken)



▲▼ Significantly higher/lower than Wave 3



Demographic profile of lapsed and riding customers



Household Income

	Lapsed	Riding
Under \$50,000	22%	38% ↑
\$50,000 or above	69% ↑	56%
Prefer not to respond	9%	6%

Access to a Vehicle

	Lapsed	Riding
None	18%	45% ↑
One vehicle	58% ↑	45%
More than 2 vehicles	23% ↑	9%

Age Distribution

	Age <25	Age 25-54	Age 55+
Lapsed	12%	46%	42% ↑
Riding	20% ↑	54%	26%

Current Work Situation

	Lapsed	Riding
Working from home during the COVID-19 emergency	41% ↑	34%
Have worked on-site throughout emergency	6%	11% ↑
Temporarily/permanently laid off	10%	13% ↑
Was not working before the emergency	18% ↑	14%
Student	8%	8%
I have returned to working on-site	3%	12% ↑
Other	8%	5%

