



# Ridership Today.... And Tomorrow

September 15 2021



# Snapshot



Demand scenarios are based on expectation that Canadians are safe to move freely



Transportation choices people make are a function of their lives.



No stone unturned approach. All data and research sources are reliable at City-wide level only.



WFH is biggest variable, and downtown return is key to not only subway and streetcar use, but also 30-40% of bus ridership

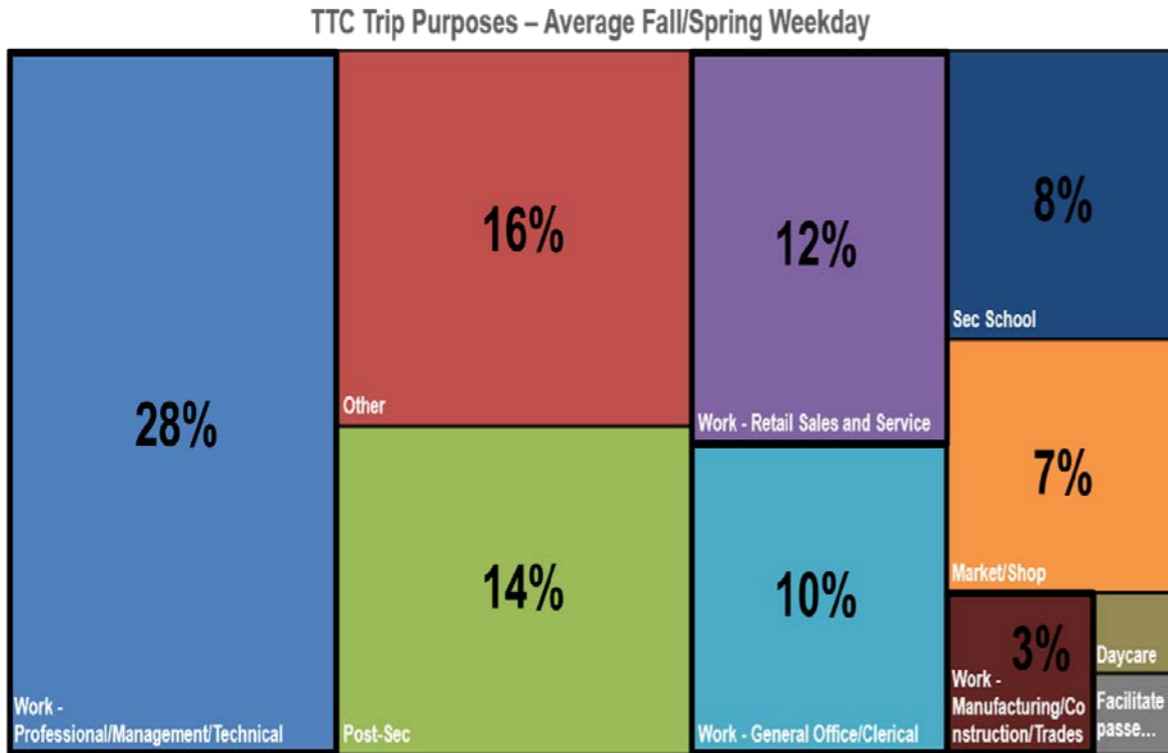


Demand scenarios suggest 67% (pessimistic) to 93% (optimistic) between Sept 2022 and Aug 2023

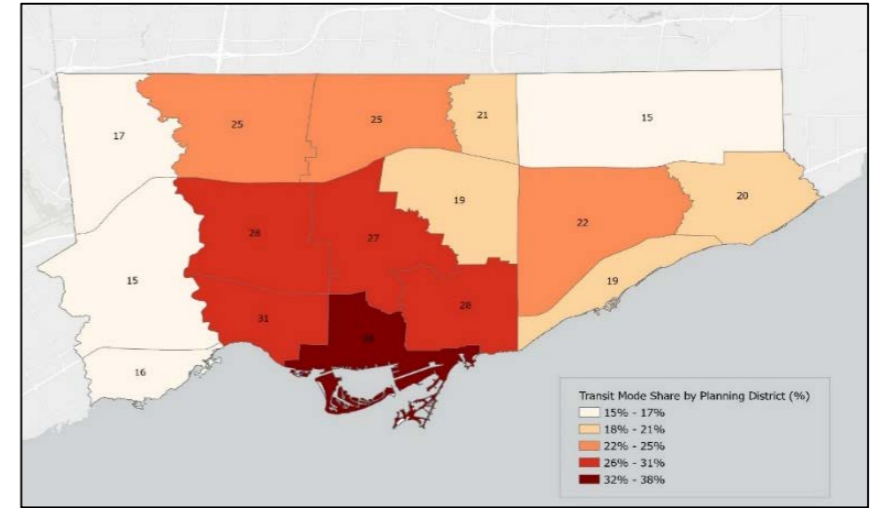


Supporting ridership return is not business as usual. We need new initiatives and we need continual understanding of the needs of our customers

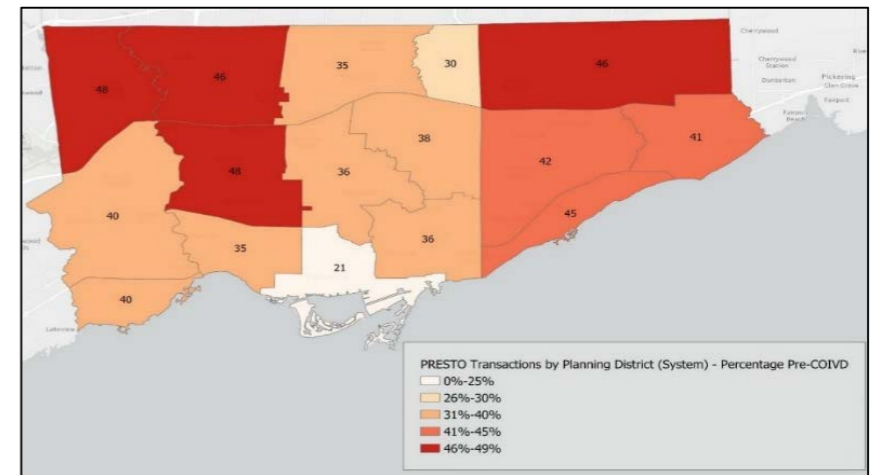
# We Track When and Why Customers Use TTC



29% of TTC Customer demand is Office Workers



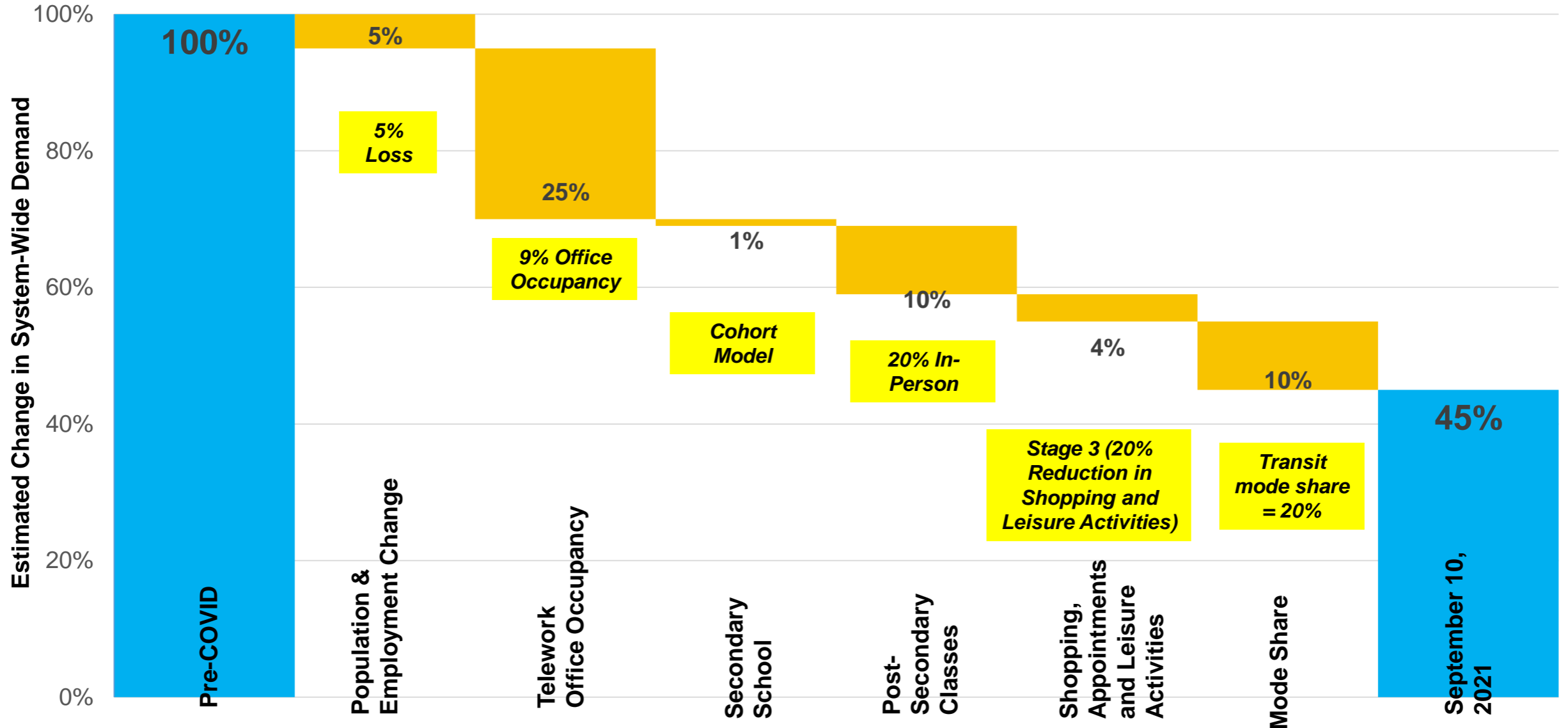
Transit Mode Share, Pre-COVID



Change in Presto Transactions - COVID

# Current State: Change in Demand due to COVID impacts

As of September 9/10, 2021



# What needs to happen to meet demand thresholds?

Demand Level	50%	70%	80%	90%
Office Occupancy	15%	50%	60%	80%
Secondary Learning	85% In-Class	Full In-Class	Full In-Class	Full In-Class
Post-Secondary Learning	50% In-Class	Full In-Class	Full In-Class	Full In-Class
Retail, Entertainment, Leisure Activities and Gatherings	Most with Capacity Limits	Most with no Capacity Limits	Most with no Capacity Limits	Full Return
Transit Mode Share	20%	24%	26%	27%

**We believe this will occur by end of 2021**

**We believe this is possible by end of 2021 or early 2022**

**Potential New Normal States**



# TTC's Toronto Employer Survey



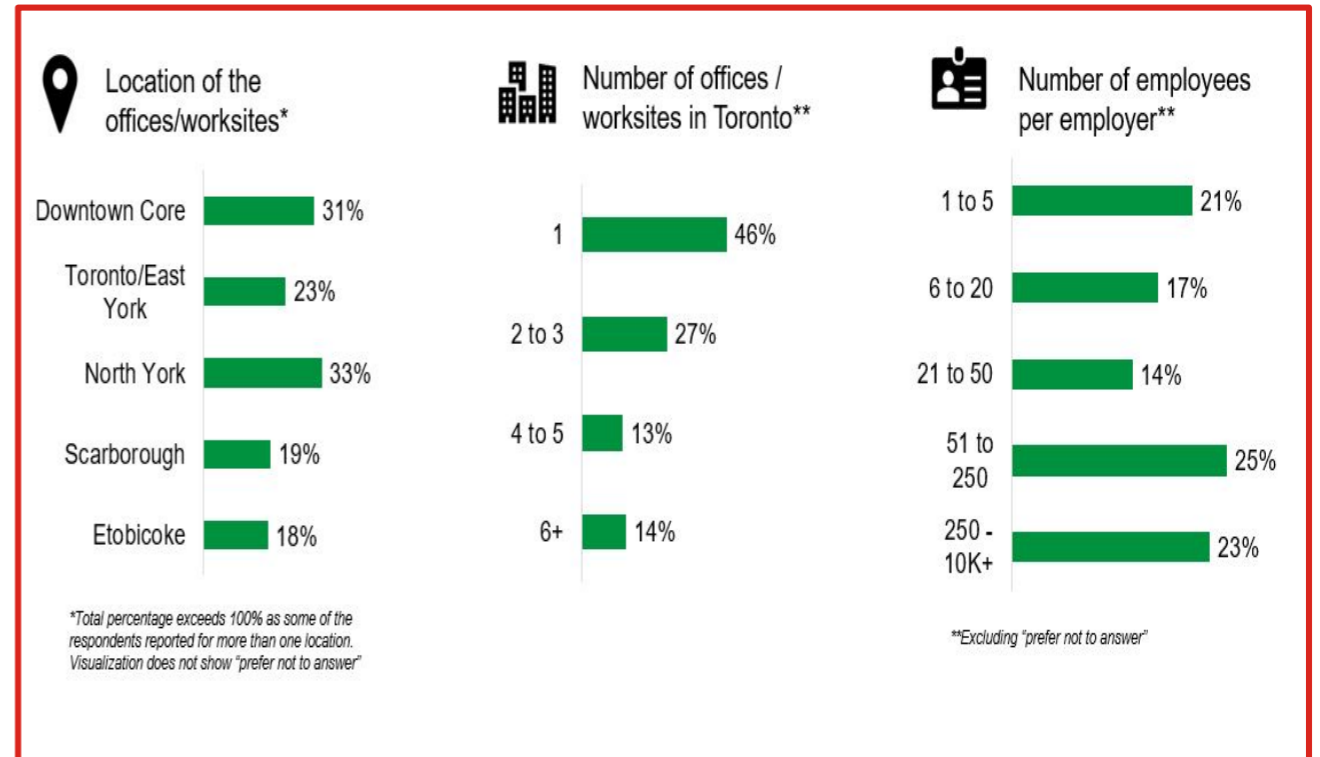
Strategic decision-makers from organizations with offices and work sites within the City of Toronto. Sample = 255



Data collection was carried out online. Average survey length was approximately four minutes.



Fieldwork dates: June 30 to July 9, 2021.



# Key consideration for TTC Ridership outlook

## Before the pandemic

**43%** Employees working from home pre-pandemic with some frequency.

**0.35** Average number of days per week Toronto employees worked from home before the pandemic.\*

## After the pandemic

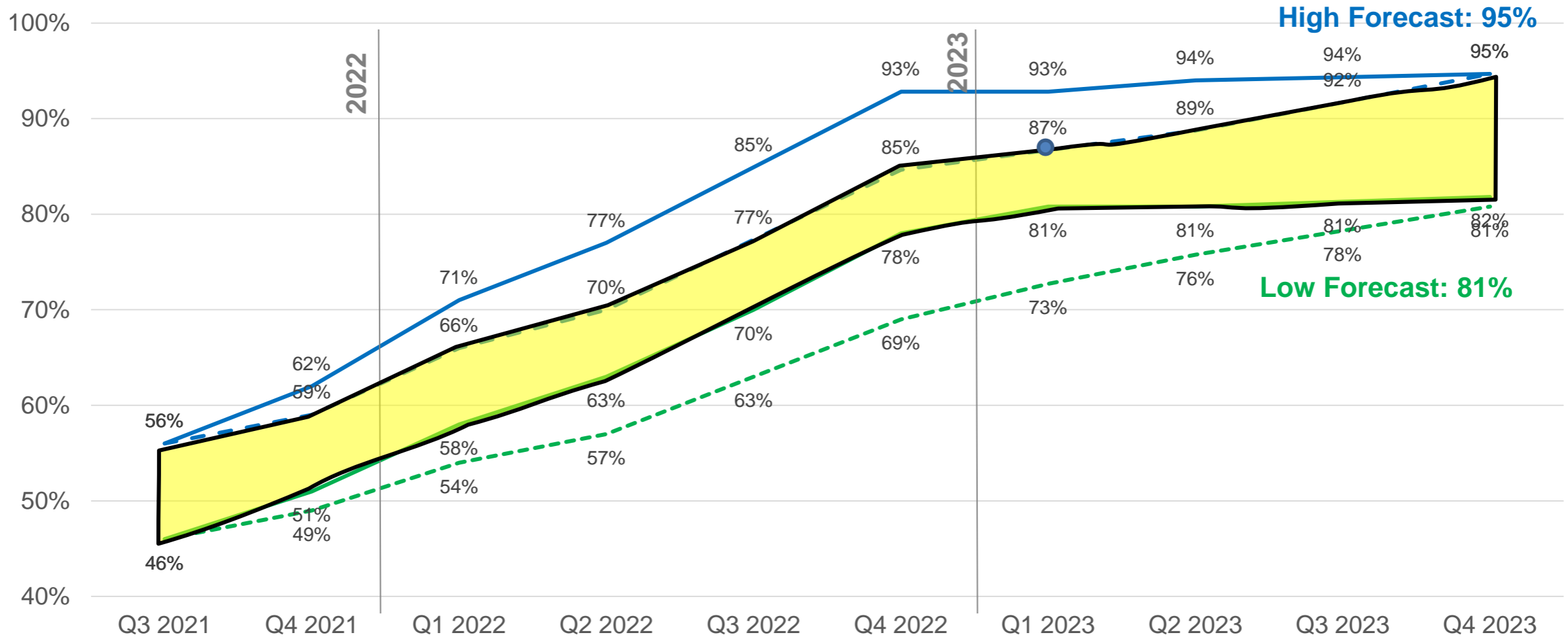
**43%** Employees will work from home post-pandemic with some frequency.

**3.3** Average number of days per week Toronto employees will be allowed to work from home after the pandemic.

Nearly half of respondents say their firms are likely to consider major changes to their office space and worksite footprint post-pandemic.

# If true..... 2022/2023 Demand Outlook

- Based on research and data collected as of August 20, 2021
- Two possible demand levels achieved within 1 – 2 years





# | Initiatives/Policies for the new Normal

## **What we are doing now to attract Customers to TTC**

- Marketing campaigns
- Fare Pricing
- Increasing service
- Real-time crowding information
- Service integration with neighbouring transit agencies
- Partnerships with events
- Reallocation of road space

## **What others could do to attract new Customers to TTC:**

- Road Tolls/fees
- Incentives to reduce car ownership
- Parking pricing
- Active transportation campaigns
- Enhanced transit stop amenities



September 15,  
2021