



Planning for our customers beyond COVID-19

TTC Board

July 14, 2022

Our approach to understanding TTC customers:



This isn't business as usual.
Recovering from COVID needs new initiatives, strong coordination



No stone unturned approach.
We've gathered reliable data from multiple partners & sources

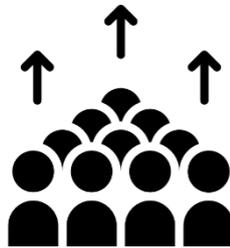


A Future of Scenarios.
We consider demand recovery as a range, not one inevitability.



Focus on our customer segments.
Understand the unique behaviours of customers to drive recovery, growth

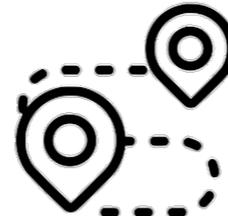
Developed a segment-based model that considers these key drivers:



**Pop
Change**



**WFH
Rates**



**Trip
Rates**

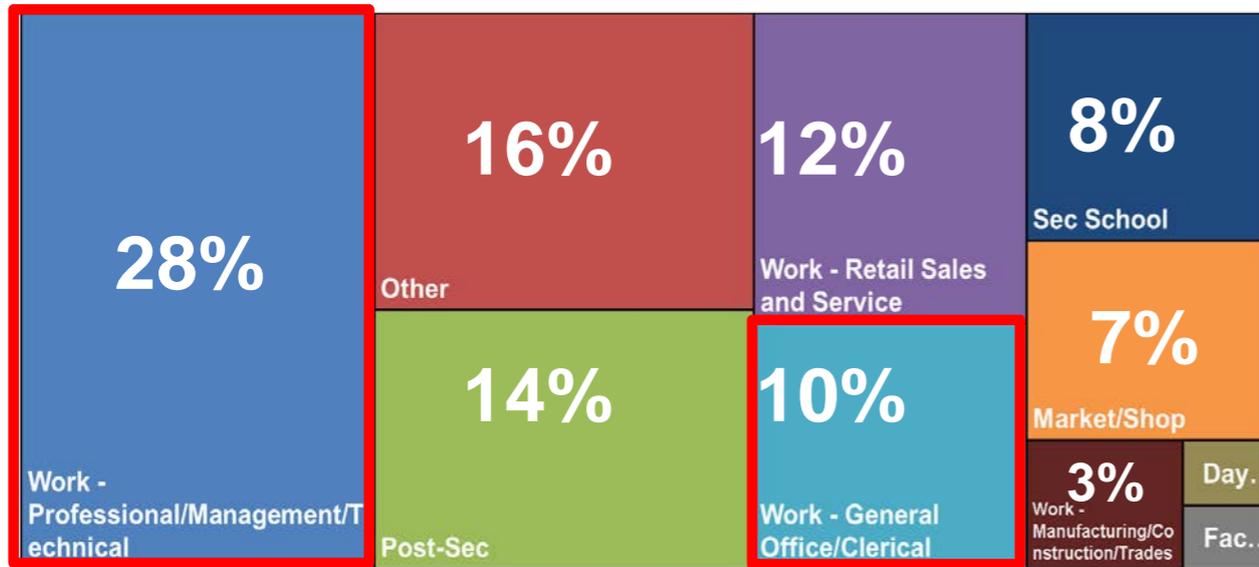


**Mode
Share**

Customer insights & segment implications

Recovery Forecast: End 2023

Trip Purpose : Pre-COVID

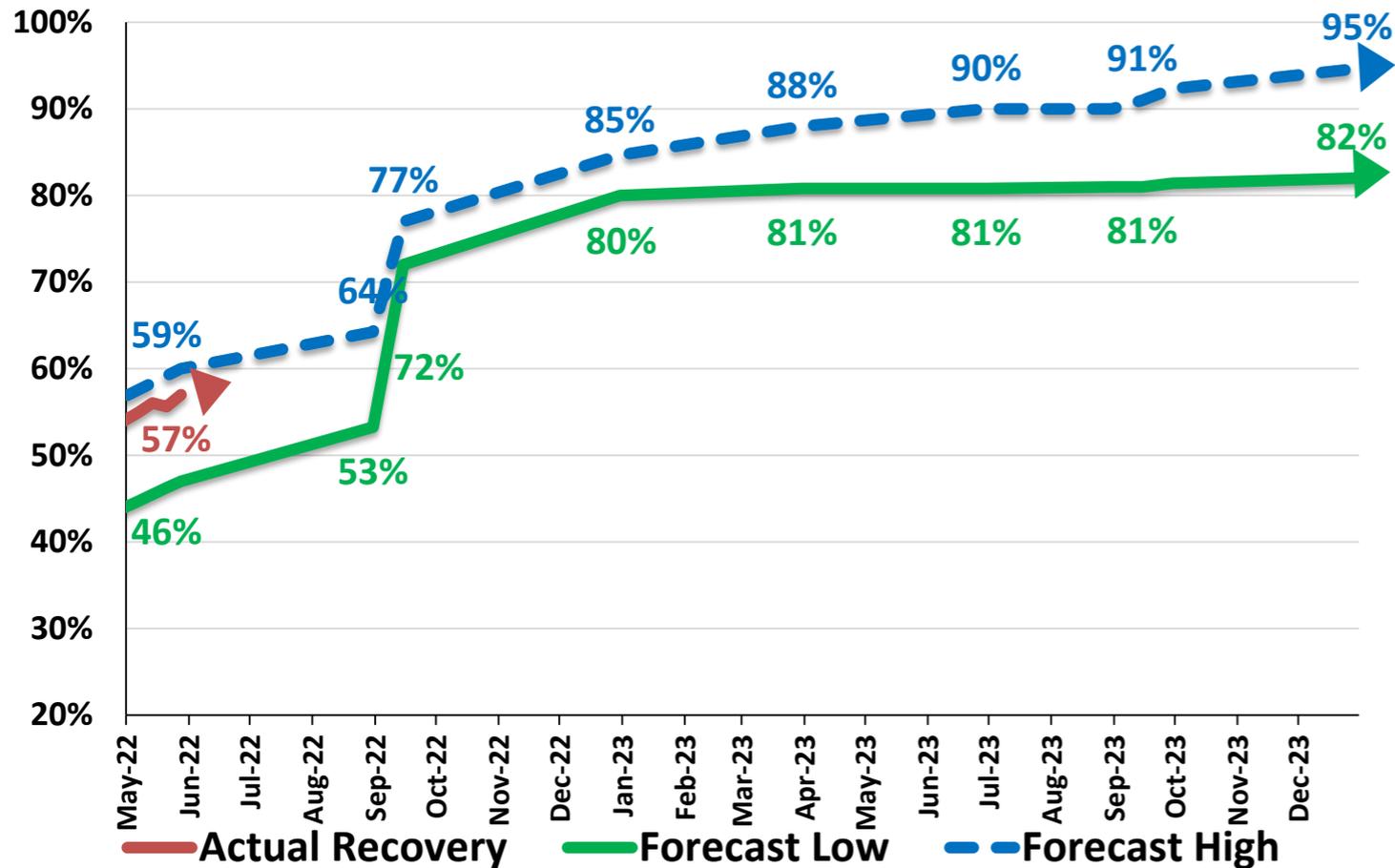


Metrics		Outlook
Work from Home / Learn from Home	Office Occupancy	60 to 80%
	Post-Secondary In-Class Learning	95 to 100%
	Secondary In-Class Learning	100%
Trip Rates	Discretionary Travel	-10 to 0%
Mode Share	Mode Share (Work/School/Disc)	-5 to 0%
Recovery:		82 to 95%



Customer insights & segment implications

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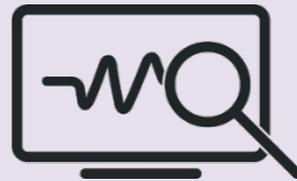
A Broad & Deep Research Scan

Cast a broad and wide net to find sources and stakeholders for our forecasting efforts— both internal to TTC and external. Focus is on flexibility and frequency of data sources.



Consultation & Outreach :

- City of Toronto – population, land use, traffic levels, etc.
- School Boards
- Universities & Student Move
- **Toronto Region Board of Trade**
- Metrolinx
- North American Peer Agencies



Third-Party Data Monitoring:

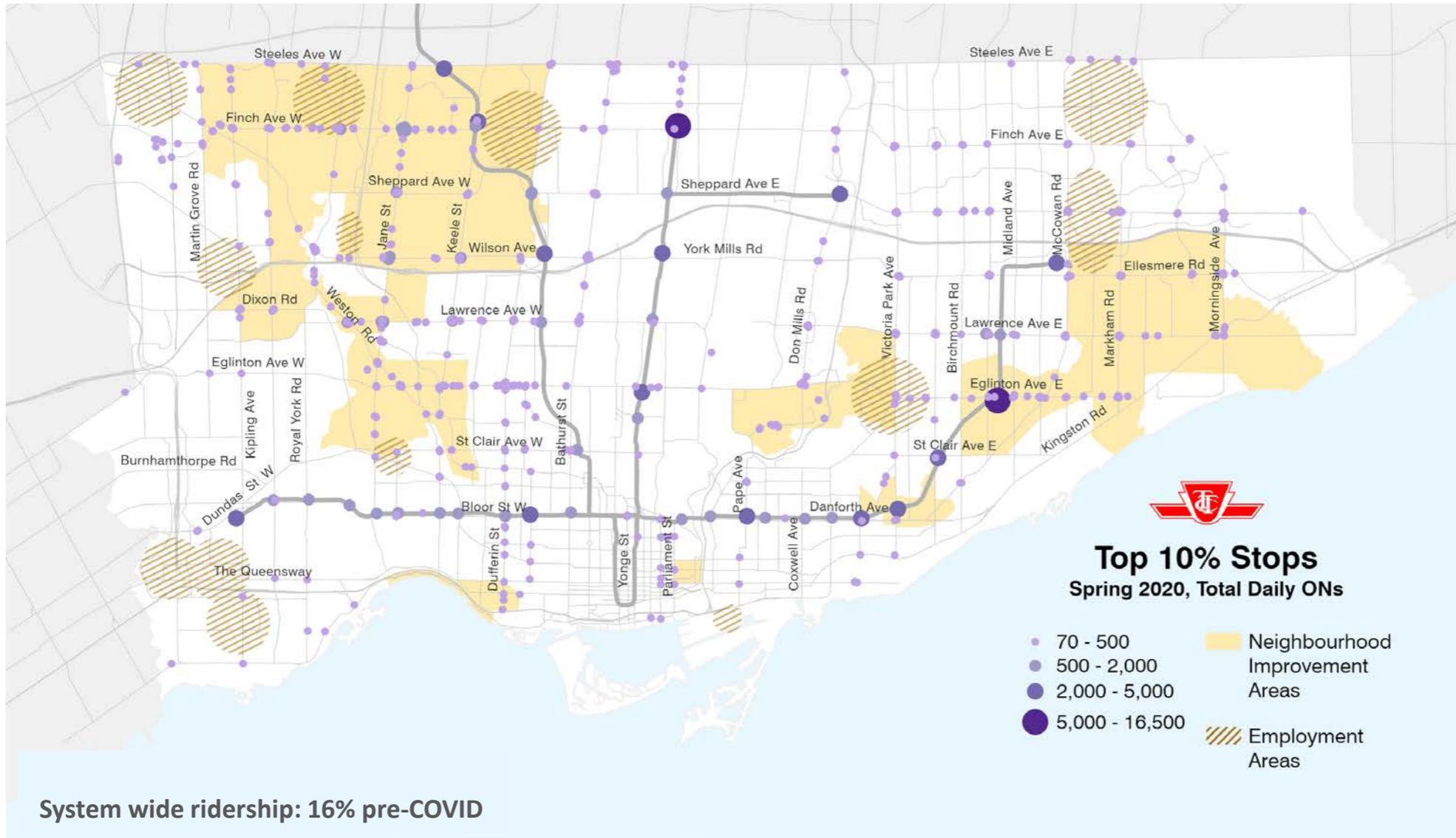
- **Labour Force Survey** (StatsCan)
- Canadian Survey on **Business Conditions** (StatsCan)
- Google & Apple Mobility Data
- **SRRA Downtown Office Occupancy Index**
- New Vehicle Registrations
- Emerging: Anonymized Mobility Data



TTC Primary Research:

- Analytics of current customers
- Occupancy
- Access to Transit
- TTC Customer Panel
- **TTC Toronto Employer Survey**
- Customer Satisfaction & COVID-Surveys
- Transportation Tomorrow Survey, and COVID Household Interrupted Travel Survey

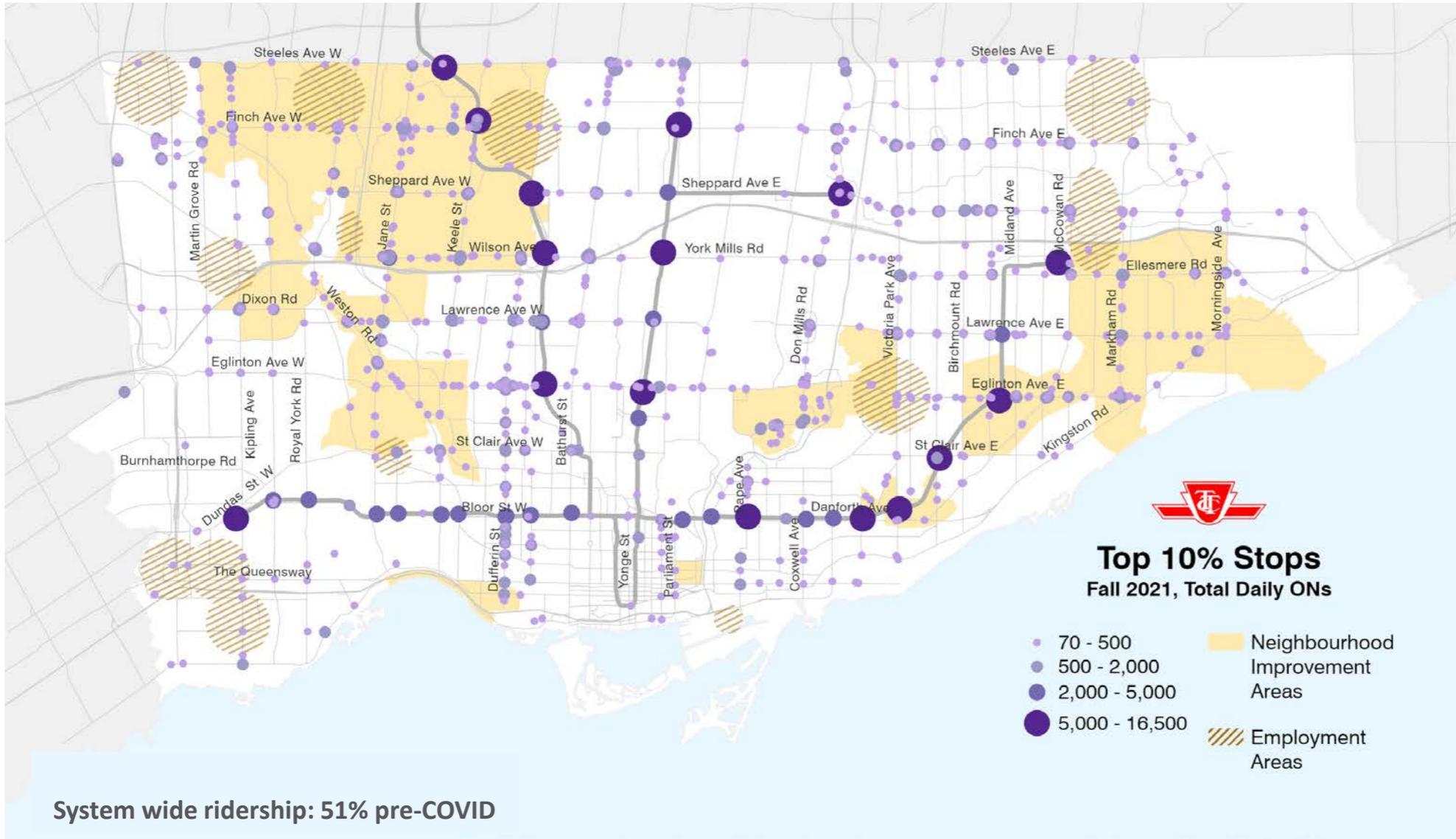
Customers continued to rely on the TTC



At the very start of the pandemic, there continues to be widespread use of the bus network across the City, demonstrating the essential role TTC plays in moving people



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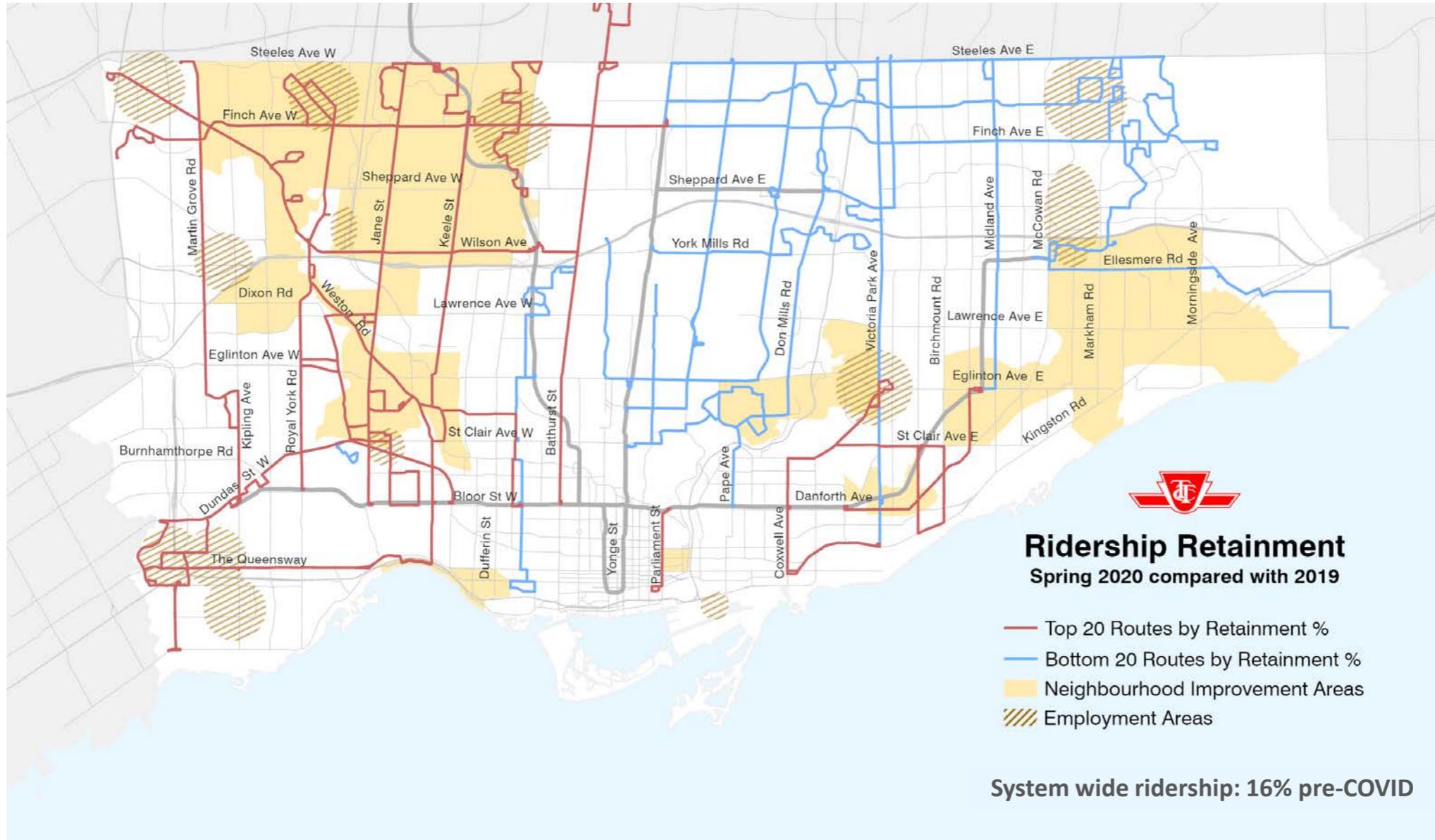
Fall 2021, the highest point of recovery during the pandemic prior to 2022, most of the key arterial bus corridors are strongly recovered



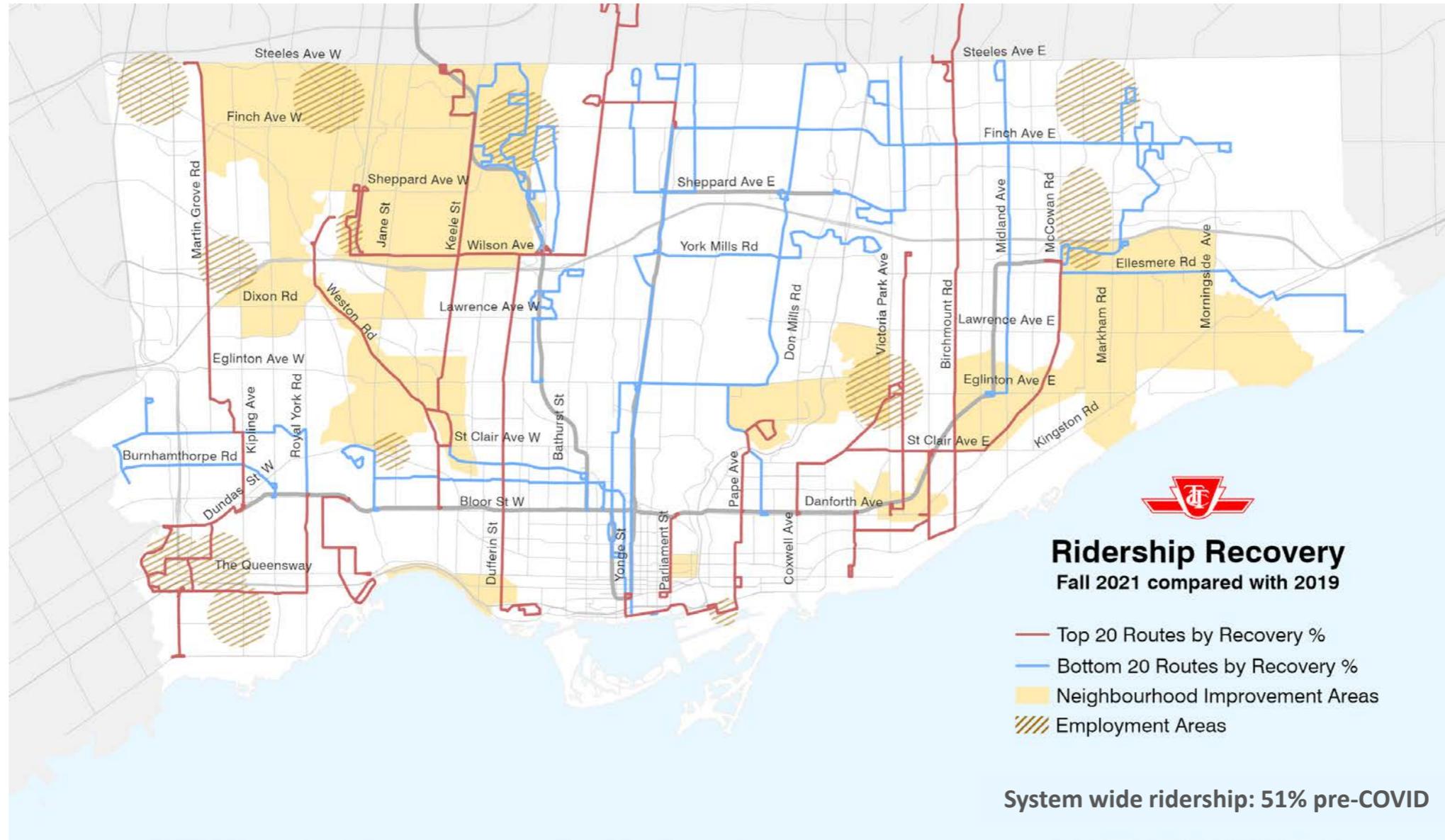
Customers who continued to rely on the TTC have different travel behaviours than 9 to 5 office worker



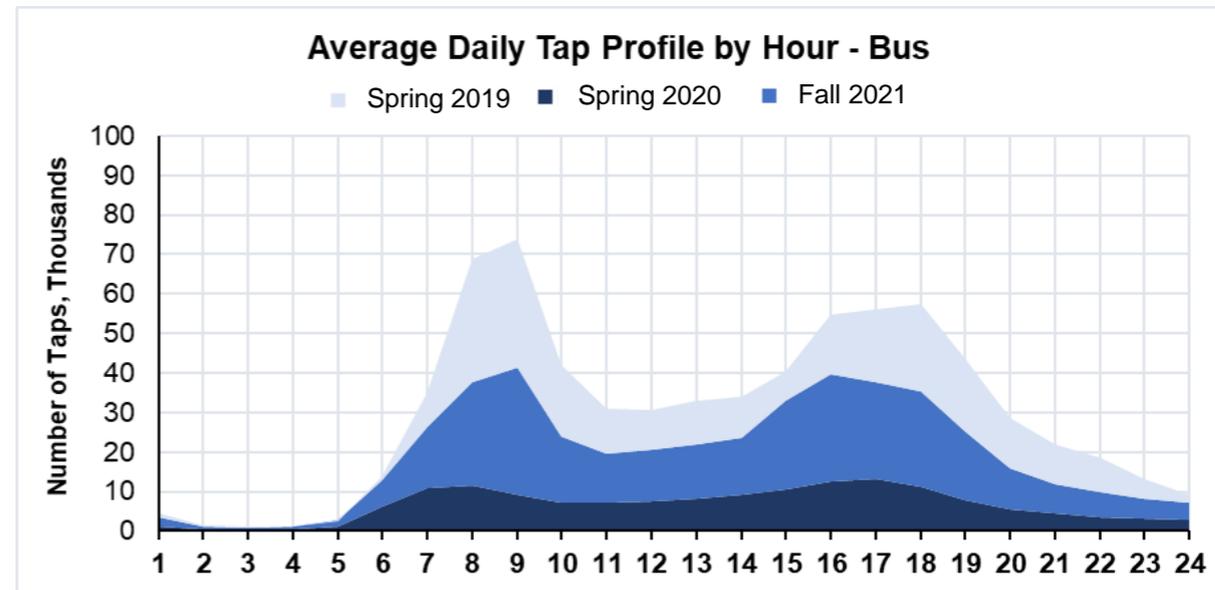
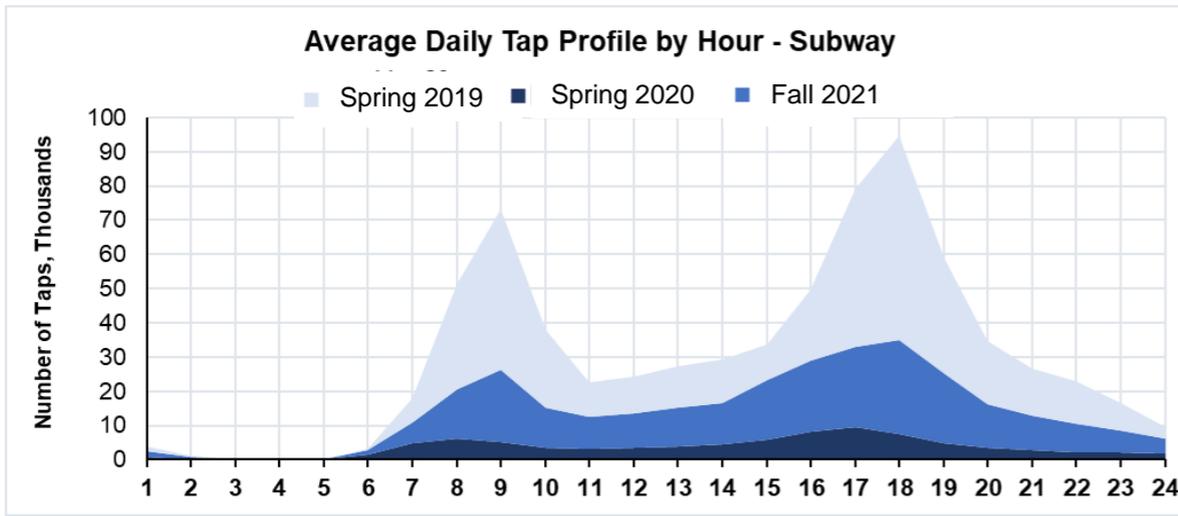
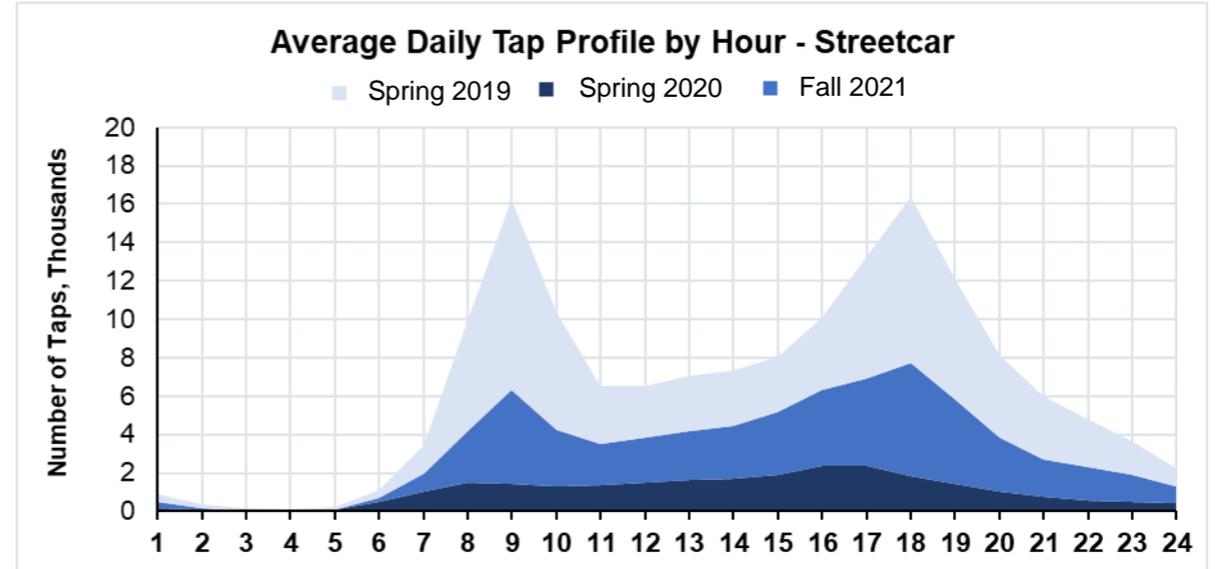
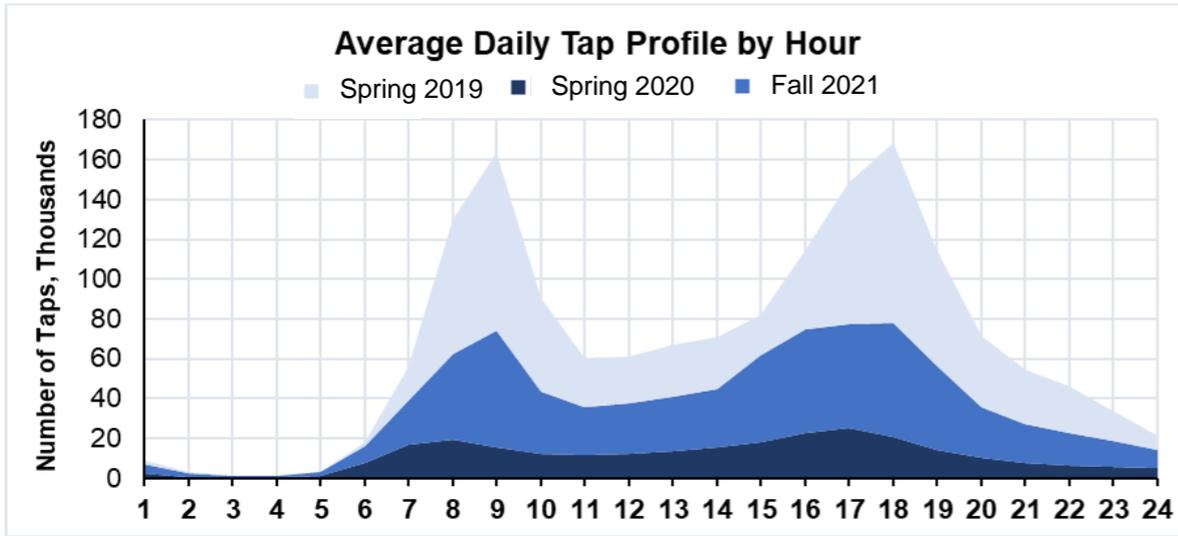
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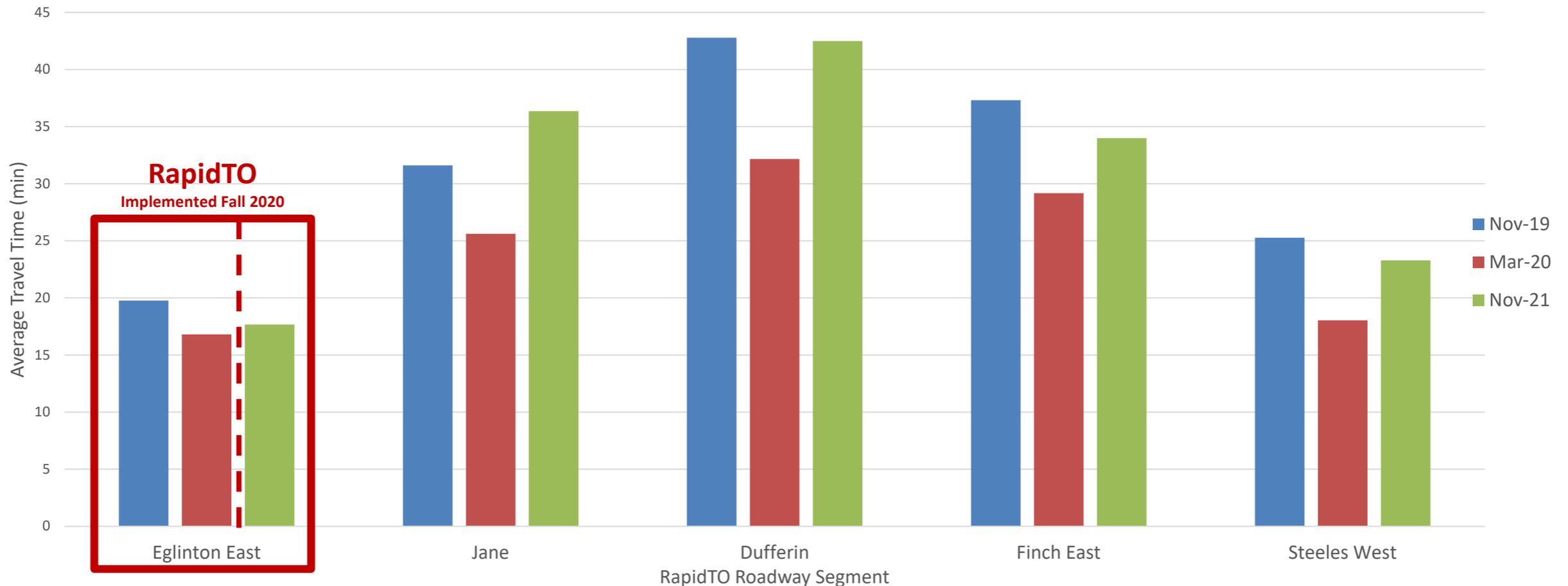


Off-peak periods are recovering faster



Priority bus lanes help our customers reach more opportunities in less time

Peak-Direction Travel Times in PM Peak



Low ridership levels not only affect the TTCs financial health, but it also affects the economic vitality of the city and region as a whole



Pre-COVID photo

Maintaining high-levels of service over the course of the pandemic benefited our customers who needed it the most

- All Day, Everyday Network
- Express Bus Network
- Blue Night Network
- 10-Minute Network
- Grid network design to facilitate transfers
- Off-peak crowding standard
- Two-Hour transfer
- Kids under 12 ride free
- Fair pass
- Request stop program
- Designated waiting areas
- Easier access
- Transit stop amenities
- Improved customer information
- Real-time crowding information for bus network



Opportunities for further consultation and study

2023 Annual Service Plan

Focus areas:

- COVID-19 learnings: Better understand travel needs and priorities of people with low income, women and shift workers
- Share and seek feedback on Line 6 network changes
- Share and seek feedback on Line 3 network changes

Round 1 activities:

- Stakeholder meetings (2)
- Focus groups (3)
- Online survey (3 topics)

To be presented
to the Board in
early 2023

5-Year Service Plan (2024-2028) & 10-Year Outlook

Opportunities for further study:

- Continue to explore ways to support travel behaviours of customers who continue to rely on the TTC
- Further research on hybrid work model
- Explore innovative service delivery options

Additional public engagement planned

To be presented
to the Board in
December 2023



