



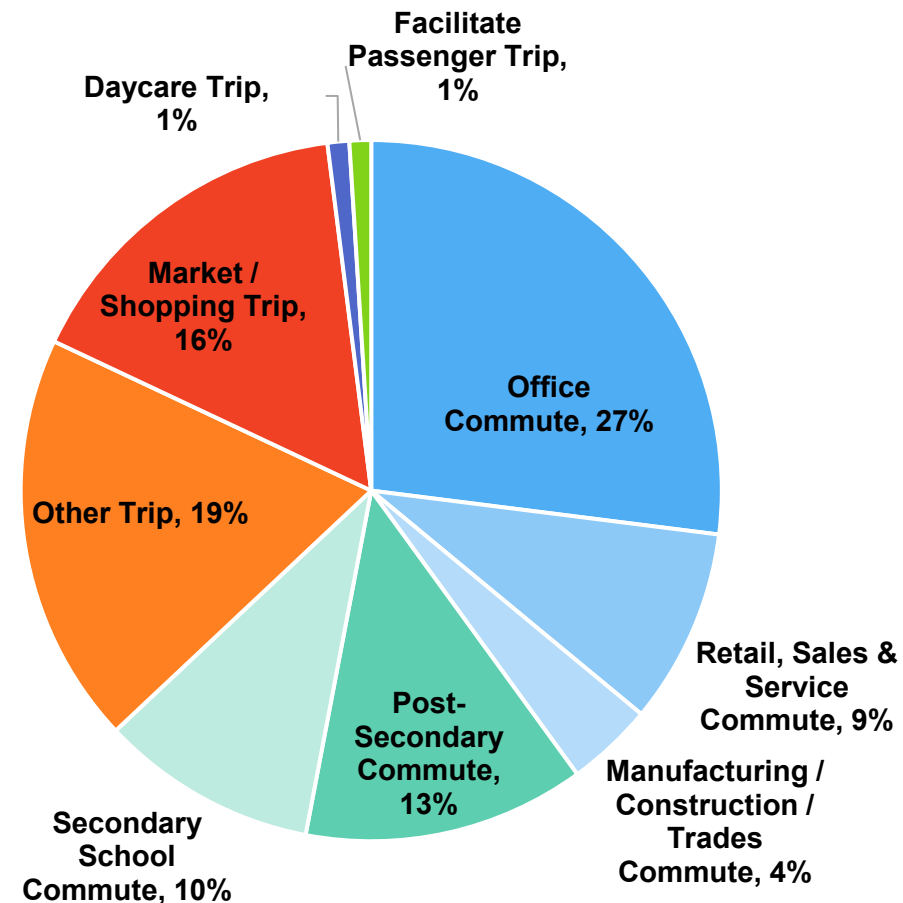
Framework for Ridership Growth

July 10, 2025

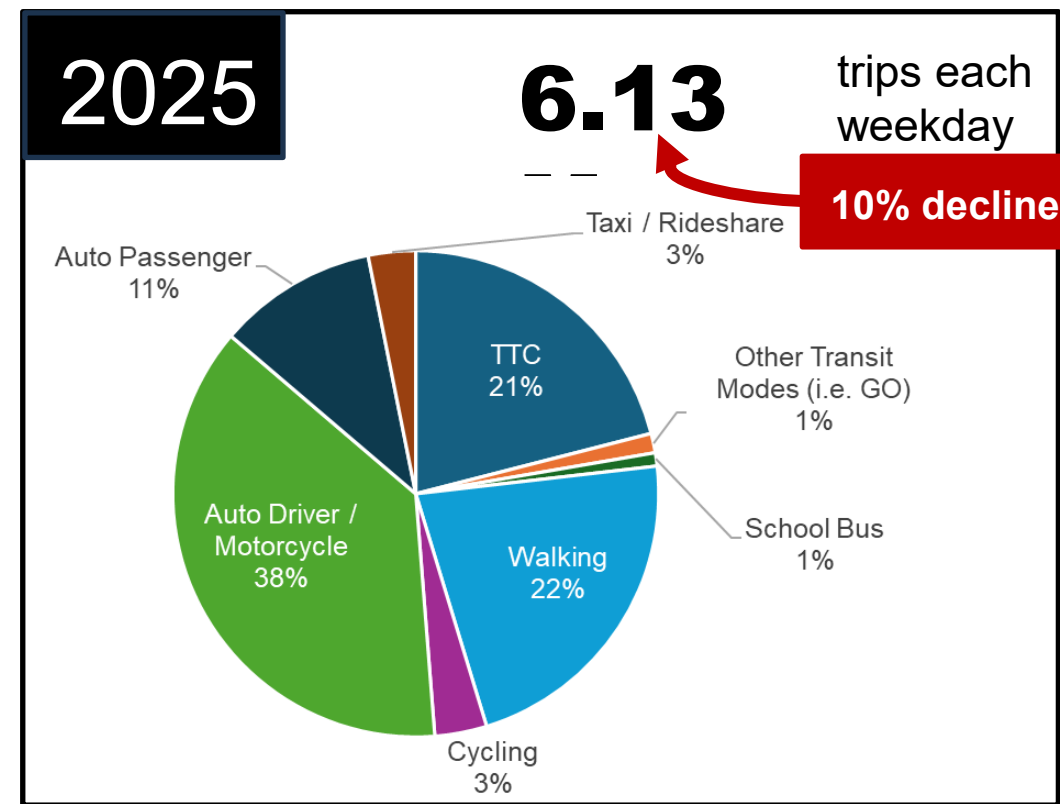
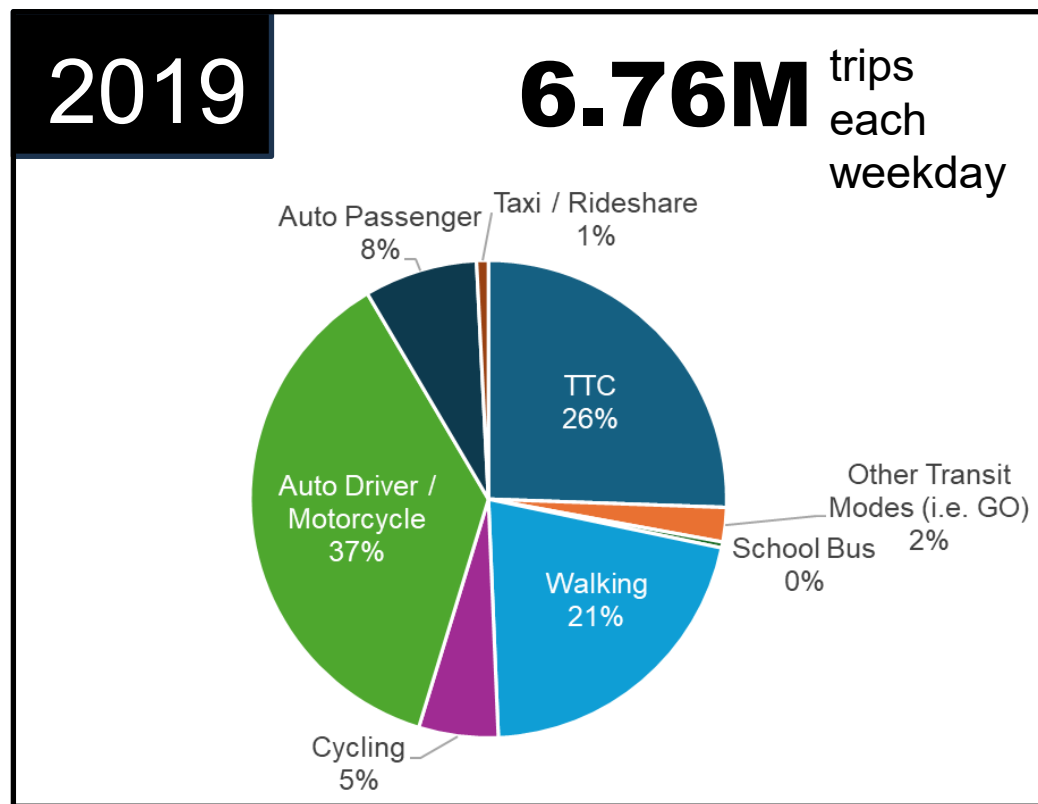
Changing travel patterns continue to shape the path to ridership growth

- 350,000 fewer daily boardings due to hybrid work since 2019
~24% decrease in office occupancy downtown
- Market trips have doubled in share since 2019
- Demand on Tuesdays to Thursdays is now ~6% higher than Mondays and Fridays

Weekday trips by trip purpose



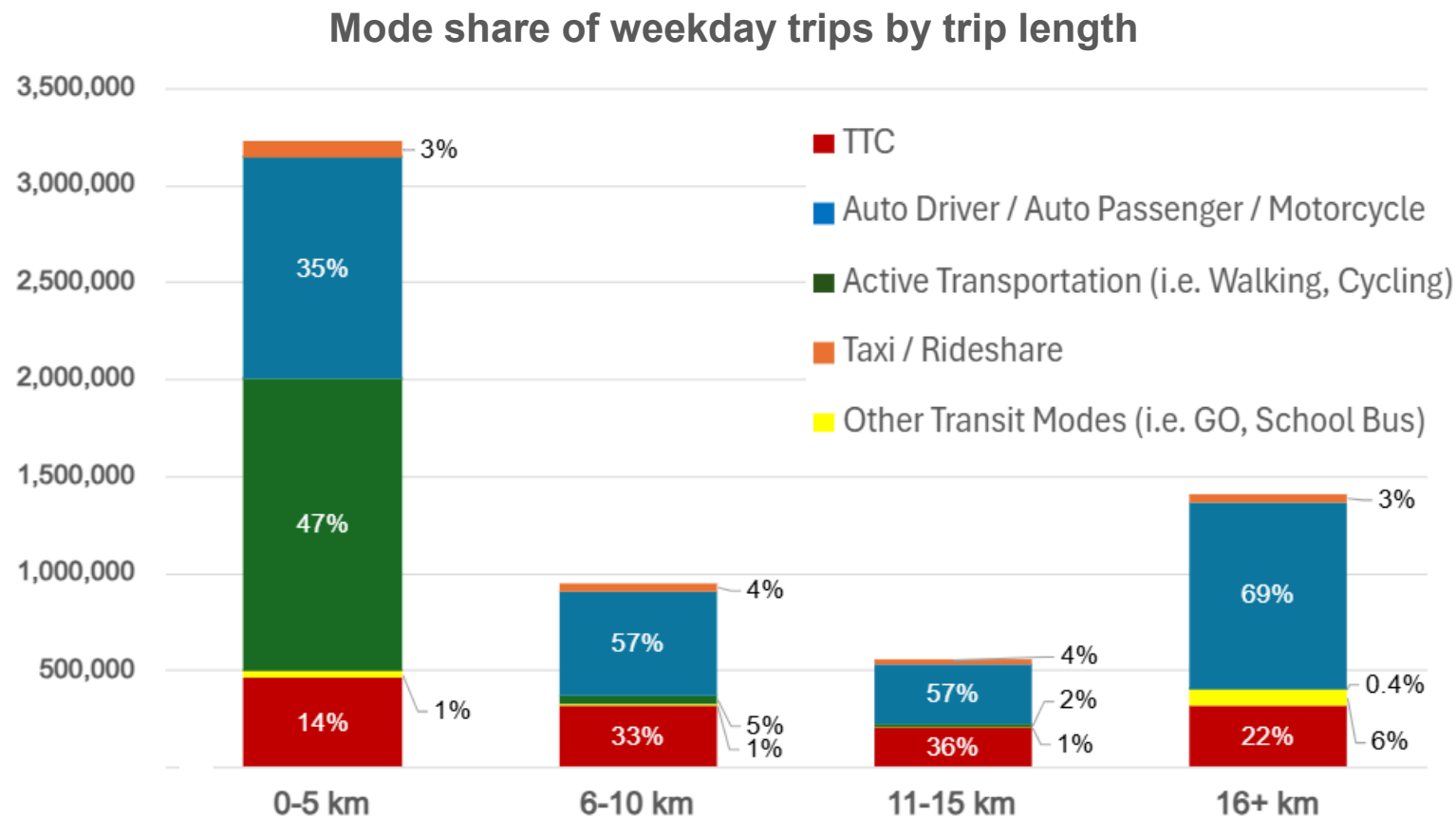
Torontonians are taking fewer trips, and TTC mode share has declined



**Opportunity to grow transit ridership is not in generating new trips
Instead, need to shift existing trips away from private vehicles**

Capturing even a small share of longer-distance auto trips could yield significant ridership gains

Private vehicle use accounts for half of all trips in the city, including 68% of trips over 16km

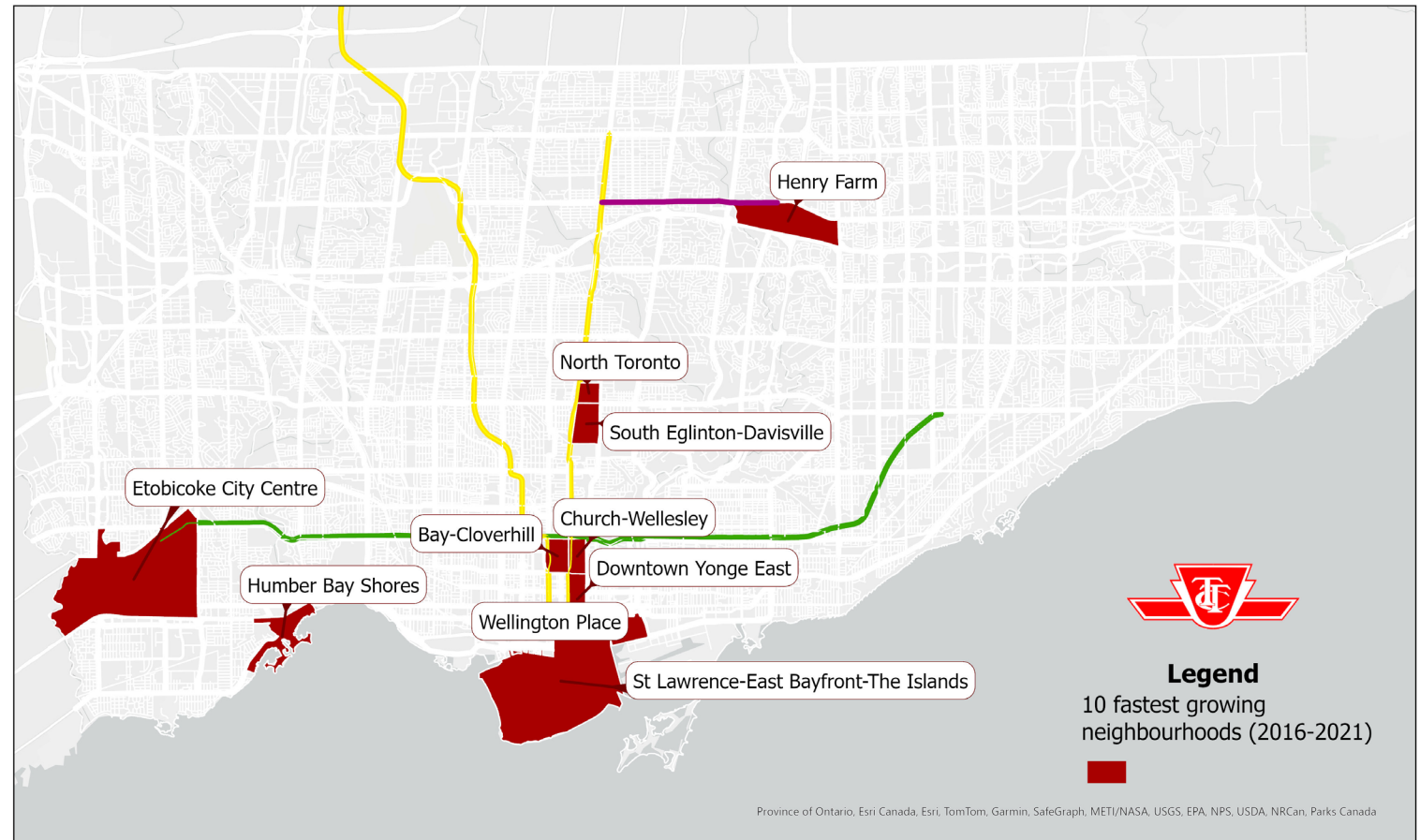


Key growth areas can be leveraged for ridership growth

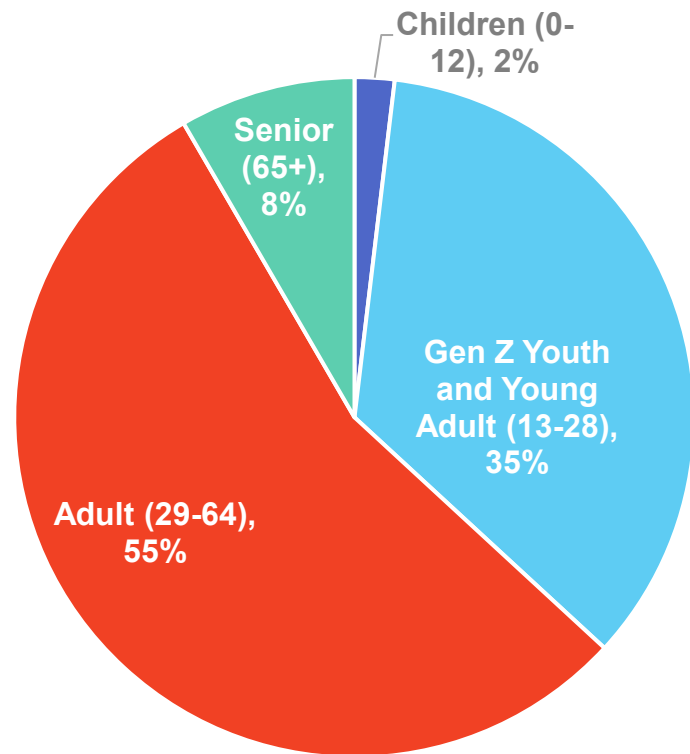
+ 269K new residents
in 2024

**Population growth is not occurring
evenly across Toronto**

Among Toronto's 158
neighbourhoods, the ten fastest
growing grew by an average of 31%
or more vs 2.3% citywide



TTC continues to serve a diverse and changing population



- **Seniors (65+)** now outnumber children under 15
→ projected to nearly double by 2041
- **Adults aged 29-64** continue to make up the largest share of TTC ridership
- **Student ridership** has grown modestly since 2019 and now makes up nearly 30% of total ridership
→ high international student enrollment in recent years,
→ recent federal policy changes limiting international student entry may affect future ridership growth
- **Gen-Z riders** are increasingly multimodal, less car-reliant, and expect seamless, digital-first service

Some customer groups are riding the TTC less

Among priority customer groups:

- Female ridership has declined by 2% since 2019, though women still comprise 55% of all riders
- Visible minority ridership has declined by 4%
- Low-income riders remain among the most transit reliant, and may face challenges related to affordability and access

Research on non-users of the TTC:

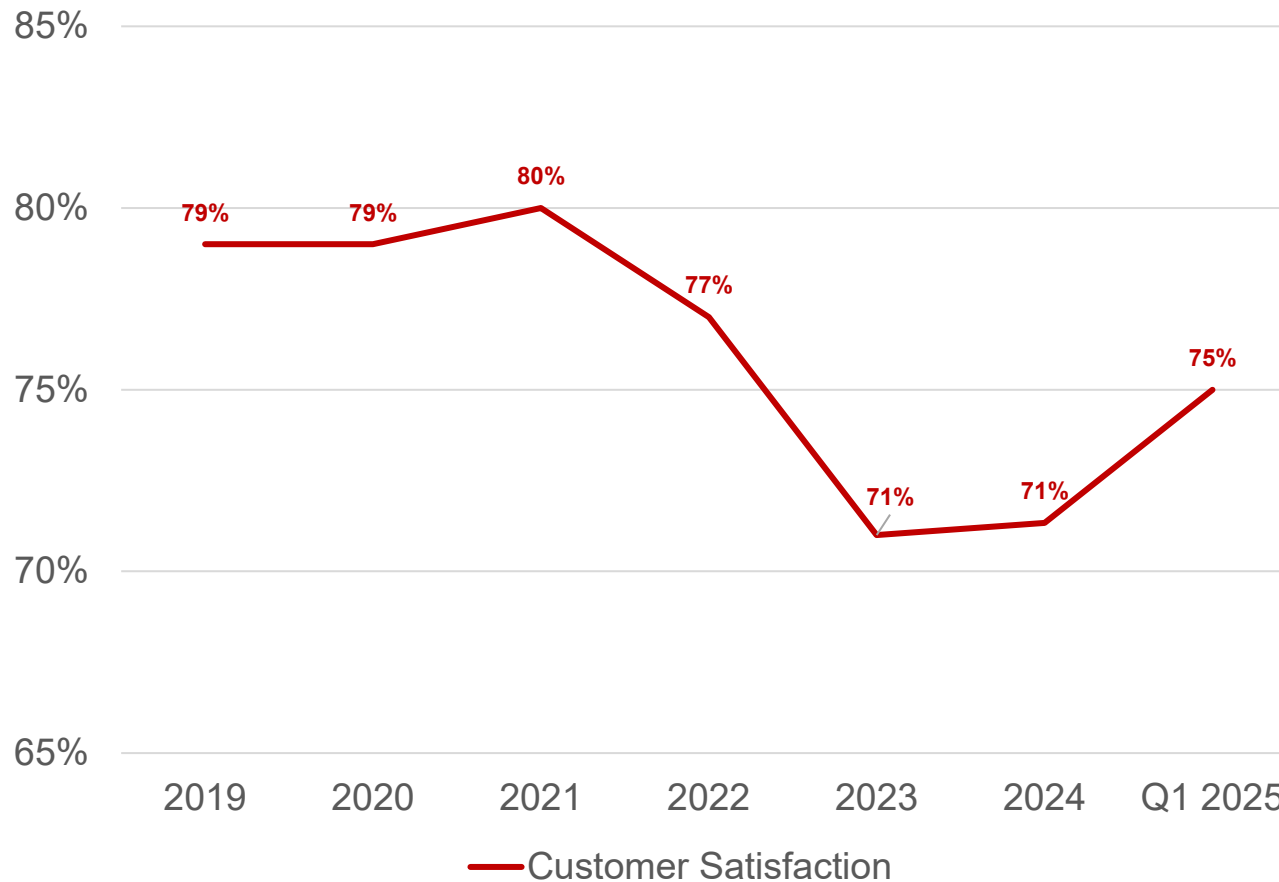
- Rely on outdated or secondhand information
- May be unaware of service improvements
→ Targeted communications could close the awareness gap and attract new riders



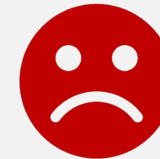
Reasons for stopping use of TTC

No longer need to travel around Toronto	54%
Switched to driving	49%
Concerned about safety	11%
Switched to a more reliable option	11%
Switched to walking or bicycling	9%
Switched to a more accessible option	7%
Switched to a less expensive option	2%
Other	3%

Customer satisfaction, challenges, and perceptions



Congestion, construction, and slow zones continue to affect speed and reliability, which are key drivers of satisfaction



Riders are most satisfied when service is fast and on time. The main sources of dissatisfaction include:

- Delays and disruptions
- Crowding
- Cleanliness
- Poor passenger behaviour



Customer safety satisfaction has improved to 66%, up from 57% last year

Key performance areas for customers and non-customers



Operational



Customer Sentiment



Comments



Coverage

Service Standards: 90% coverage. Actual 91% within 400m walk ✓

Customers report satisfaction with coverage ✓

- Existing customers satisfied ✓
- Non-customers do not see TTC as integrated network ✓



Frequency

Service Standards: frequent service is 10 - 15 mins. 87% of City better than 15 mins headway. ✓

Trip time length score ✓
Wait time score ✓

- Existing customers: positive ✓
- Non-customers: do not see TTC as integrated network ✓



Reliability

On Time Performance ✗

Customer complaints ✗

- Existing customer frustration ✓
- Lapsed customer reason 11% ✗
- Non-customers: barrier to entry ✗



Safety

Offences against Customers ✓

Personal Safety score ✓
Complaints ✓

- Existing customers see improvements ✓
- Lapsed customer reason: 11% ✓
- Non-customers: barrier to entry ✗



Crowding

Bus Occupancy levels: 0.6% daily trips overcrowded ✓

Customer complaints are location and time-specific ✓
Crowding score ✓

- Existing customers note crowding at peak times ✓
- Lapsed and Non-customers express discomfort with crowding at peak times ✓

A new baseline for growth

Returning to pre-pandemic travel patterns is no longer a sufficient benchmark.

Instead, growth must be measured by how effectively the system responds to current realities.

What hasn't changed...

Torontonians want transit that is:

- Fast
- Frequent
- Reliable
- Affordable
- Safe

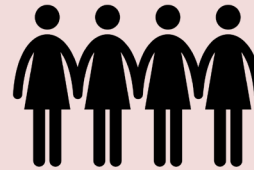
Identifying priority customer groups with potential to drive future ridership:



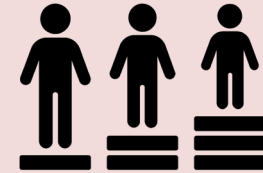
Gen Z – digital-first, flexible, and less car reliant



Shift workers – travelling outside traditional peak hours, often across dispersed destinations



Women – making complex, multi-stop trips and prioritizing safety, comfort, and reliability



Customers with low-income – relying on transit for affordable daily access to opportunity

Summary of previous consultation efforts

5-Year Service and Customer Experience Action Plan (2024-2028)



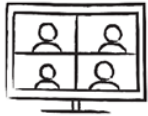
2,913

Survey participants



300+

Pop-up participants



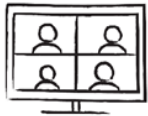
23

Community partner
meeting participants



19

TTC employee focus
group participants



20

Customer focus
group participants



540

People engaged
by Youth
Ambassadors

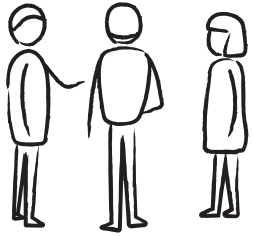
"Improving service reliability is the single greatest improvement that will impact my experience with the TTC."

"Improving service should not just be about increasing frequency (albeit this is important) but also about speed improvements and reliability. "

"We just want transit that's frequent and reliable."

Summary of previous consultation efforts

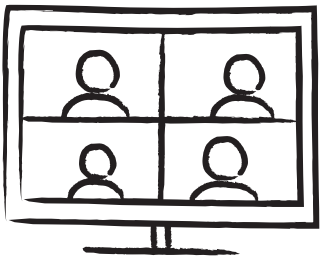
Annual Network Plans - 2025 example



2700+ Customer feedback through Round 1 and 2 consultations



19 Outreach events hosted across the city and at bus and streetcar divisions



6 Virtual meetings with the Planning Advisory Group and focus groups in Round 1 & 2

“Improve connections between the TTC and other transit agencies.”

“Continue to pursue transit priority measures.”

“Continue to prioritize communication and transparency around construction-related detours and service adjustments.”

“This service will benefit many apartments that don’t currently have service.”

Summary of current and ongoing consultation efforts

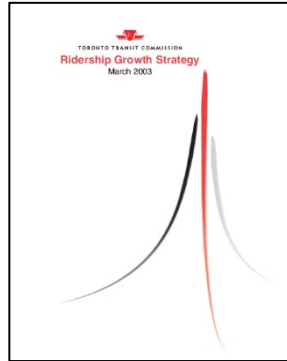
- 1. Customer Satisfaction Survey:** to understand overall customer journeys and sentiment. Monthly to 500 TTC customers (Toronto/GTHA)
- 2. Safety and Security Intercept Survey:** to understand real-time sentiment. Feb 2025 – present to 103,000 TTC customers
- 3. Personal Safety and Security Survey:** to gain deeper understanding of safety concerns. 2023 and April 2025, 1,221 TTC customers and non-customers
- 4. TTC Customer and Non-Customer Experiences - In-depth interviews on ridership and safety.** April 2025, TTC customers and non-customers
- 5. Community Safety Consultations:** May 27, 2025, diverse group of Community Lived-experience Advisory Groups representing key demographics.
- 6. Bunching and Gapping Pilot Intercept Survey:** On-time customer perceptions of 11 pilot routes (April 2025 – present)
- 7. TTC Communication and Connectivity Survey:** June 2025, 1,698 TTC customers provided input on connectivity.
- 8. Stations Makeover Intercept Survey:** July 2025 (baseline)
- 9. Innovation and Sustainability Strategy Surveys:** customer and employee perceptions of TTC Innovation Strategy (August 2024), 1384 responses from TTC customers and employees.
- 10. Employer Insights Survey:** to understand evolving return-to-office trends, 500 decision-makers from Toronto and GTHA in 2024, new wave on June 30, 2025.
- 11. Queen Quay East Interim Bus Priority Lanes Survey:** to gather feedback from customers regarding priority lanes (February 2025), 635 TTC customers provided input.
- 12. Transportation Tomorrow Survey:** a travel diary survey conducted every 5 years to understand demographics and transportation patterns of all modes in the Greater Golden Horseshoe.



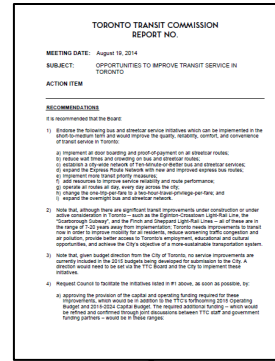
More than
100,000
customers provided
feedback

Safety
Night travel
Reliability
Cleanliness
Wayfinding
Communication
Connectivity
Customer experience

Ridership growth has been a longstanding topic...



2003



2014



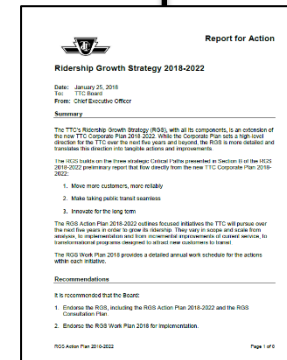
2020



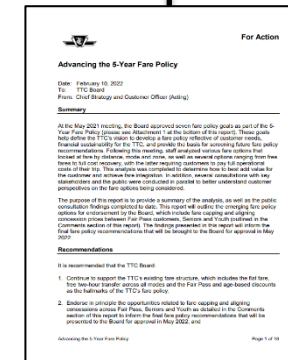
2024



2009



2018

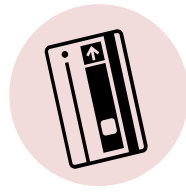


2022

...and common themes and initiatives emerge



Establishing a **base network** of transit service



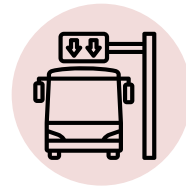
Accessible and easier **fare payment** or making transit **more affordable**



Enhancing **express** services



Providing **frequent service**



Improving service through **transit priority**



Enhancing **overnight** service



Adjusting **crowding standards** to modify service



Improving service **reliability**



Customer experience initiatives

Ridership growth successes: Transit priority

Temporary Spadina Avenue Bus Replacement

- ↓ **Transit travel times improved**, from 24-56 minutes to 11-16 minutes
- ↑ **Transit reliability improved**
- ↓ **Average car travel times improved** in both the AM and PM peak hour

RapidTO: Eglinton East

- ↓ **Transit travel times improved** by 5 minutes
- ↑ **Transit reliability improved**
- ↓ **Average car travel times improved** in the AM peak hour and **are similar** in the PM peak hour
 - **No indication of traffic infiltration** on adjacent arterial roads

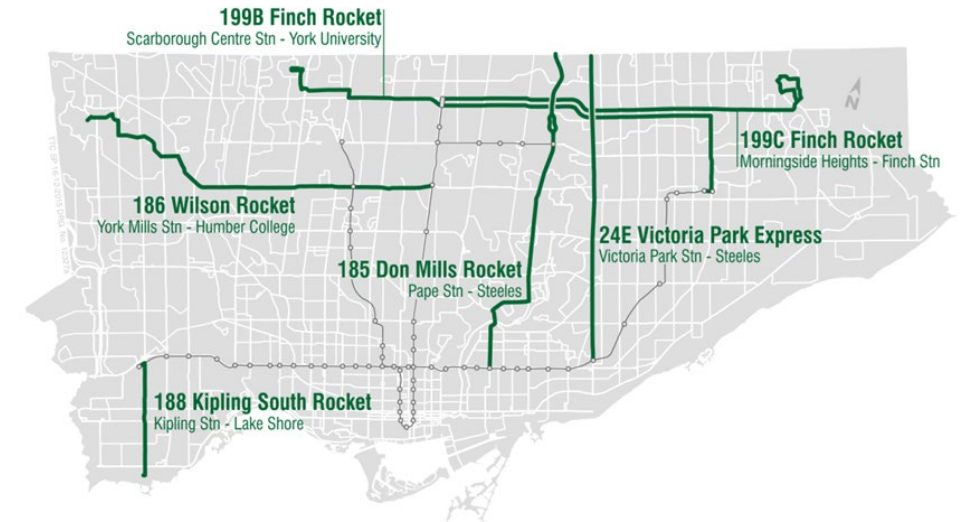
King Street Transit Priority Corridor

- ↓ **Transit travel times improved** by 5 minutes
- ↑ **Transit reliability improved**
- ↑ **Transit ridership increased** 17% (all-day weekday)
 - **Average car travel times varied by less than 1 minute** during peak hours on most east-west streets parallel to King Street, compared to before the pilot.
 - The downtown traffic network has been largely able to absorb and respond to the changes in routing that drivers have made

Ridership growth successes: Express Bus Network

March 2016 New and Enhanced Express Routes

- ↑ **Daily route ridership increased:** as high as 148% from the projected 4,200 to 6,200 on 24E Victoria Park Express
- ↑ **Corridor ridership increased:** as high as 34% on Wilson from 25,100 to 33,600
- ↑ **Steady corridor growth:** as new express route implementation either maintained or increased ridership



Late 2018, Early 2019 New Express Routes

- ↑ **Corridor ridership increased:** by approx. 20% on routes including 902, 929, 937, 952, 984A
 - **Service productivity** (rides/service hour): on the routes implemented above consistently perform above average compared to its class
 - **Speed improvements are required:** to take full advantage of the additional capacity from express routes
 - **Additional service can be justified:** on some routes to alleviate crowding and further grow ridership

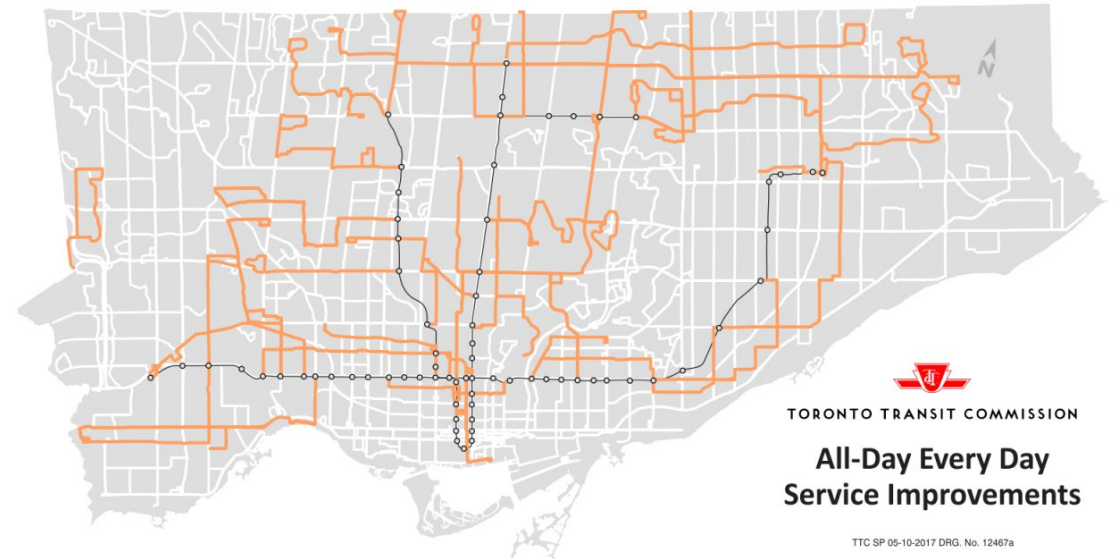
Ridership growth successes: Off-peak improvement

All-Day-Every-Day Network (Fall 2015)

- **All-Day-Every-Day:** 6:00 a.m. to 1:00 a.m. from Monday to Saturday, and 8:00 a.m. to 1:00 a.m. on Sundays
- **Reflects off-peak demand:** for transit in different periods of the day, aside from the 9-to-5 commute

Ridership growth:

- ↑ **Annual boardings increased:** by 1.6 million from the service improvements made on 45 routes
- ↑ **New service periods meet or exceed standards** of 10 boardings per service hour:
 - ↑ **56 Leaside** service restored to Sunday Early Evening, 139 boardings per day (23.2 per hour)
 - ↑ **135 Gerrard** service restored to Sunday Late Evening, 97 boardings per day (29.8 per hour)
- **Resources were reallocated:** for new routes that consistently did not meet the standards threshold



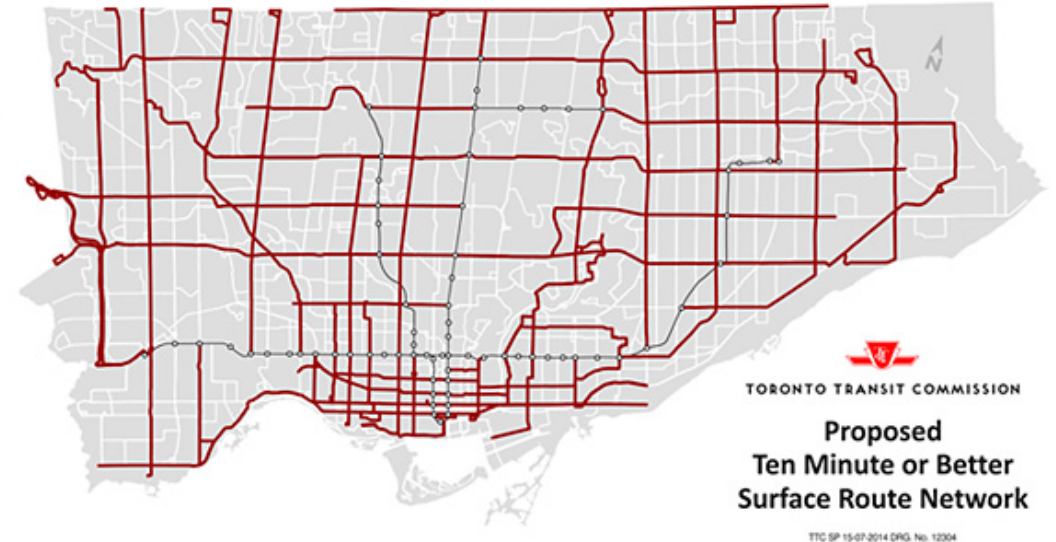
Ridership growth successes: 10-Minute Network

10-Minute Network (June 2015)

Provides **service at least every ten minutes, all day, every day**, from 6:00 a.m. (9:00 a.m. on Sundays) to 1:00 a.m.

Ridership growth:

- ↑ **22 Coxwell** boardings increased 24% from 437 (Jan 2015) to 578 (Nov 2017) in the late evening
- ↑ **87 Cosburn** boardings increased 14% from 2,459 (May 2015) to 2,870 (Sept 2016) in the midday



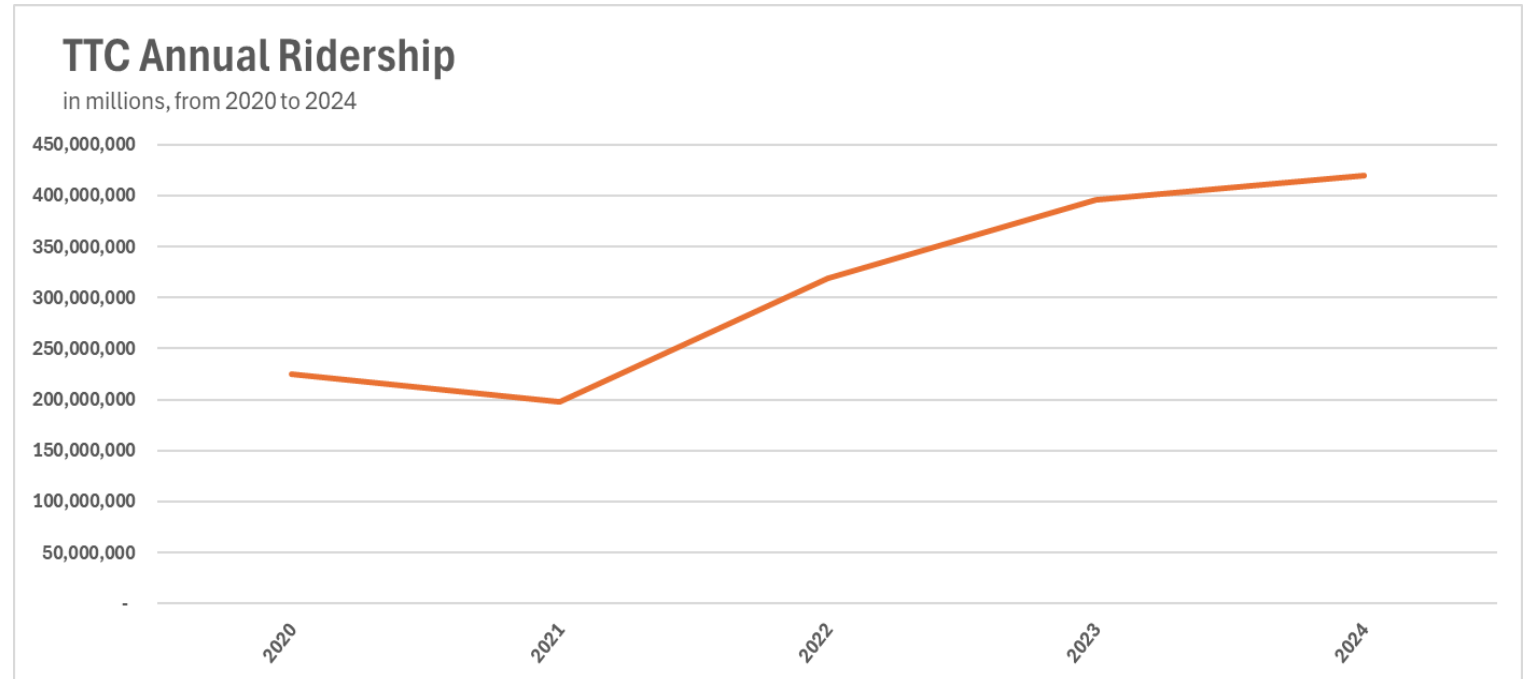
Ridership growth successes: Fare policy

- **2-hour Transfer:** original estimate was +5 million new rides per year (2017 board report)
- **Children 12 and Under Ride Free:** 11 million trips in 2014 → 22 million by 2016
- **One Fare Program:** ~30 million transfers in 2024 and 52.1 million total since inception



Ridership growth successes: Trip generation

- In 2022, TTC ridership grew 61% from 2021
- Restrictions were lifted, Work-from-Home policies changed
- Ridership increases when people have a reason to travel



How can we grow ridership

Wide range of factors that influence travel choices

Internal: under the control of the TTC

- Board prioritizes investments, policies, or programs, to directly impact ridership growth and revenues
- Key policy lever is TTC Service Standards

External: TTC has varying levels of influence

- some may require partnership with the City
- others the TTC has no control over

Not every investment (capital and/or operating) gets the same rate of return when it comes to ridership and revenue growth

Internal factors influencing ridership

Internal Factor	Example
Service Design	<ul style="list-style-type: none"> •route coverage (geographical/temporal) •introduction of new/specialized service •route restructuring
Service Quality	<ul style="list-style-type: none"> •frequency/reliability of service •span of service •crowding
Marketing and Information Programs	<ul style="list-style-type: none"> •advertising •niche marketing/ market segmentation •survey research •customer satisfaction feedback mechanisms
Amenities	<ul style="list-style-type: none"> •development of transit centres •development of park-and-ride facilities •cleanliness of service •new vehicles •bus stop infrastructure (e.g., signage, shelters, and benches) •technology, real-time information

Internal Factor	Example
Fare changes	<ul style="list-style-type: none"> •fare cost, •fare programs, and •payment options
Partnerships	<ul style="list-style-type: none"> •external partnerships •community outreach/education •planning and strategies •intra-agency cooperation •employer-based partnerships •university-based partnerships •community outreach/local government •social service collaboration
Security/Safety	<ul style="list-style-type: none"> •perceived personal security/safety •perceptions of agency safety/security

External factors influencing ridership

External Factor	Example
Population/ employment growth	<ul style="list-style-type: none"> •immigration rates •transit dependency (rising due to aging populations, for instance) •general growth •student population
Local economic conditions	<ul style="list-style-type: none"> •tourism rate •demand for travel in general •employment/unemployment levels •per capita income levels
Cost/availability of alternative transportation modes	<ul style="list-style-type: none"> •fuel/toll pricing •rate of auto ownership •auto prices and ownership costs •taxi/VFH fares •TNC's •TDM strategies •access to transit network (pedestrian network) •availability of bike infrastructure (bike lanes, Bike Share, parking)

External Factor	Example
Travel conditions	<ul style="list-style-type: none"> •congestion level •allocation of road space for TPM (bus lanes, HOV lanes) •installation of TPM (TSP, QJL, regulatory measures) •construction projects and time delays •weather
Public policy/funding initiatives	<ul style="list-style-type: none"> •federal/provincial funding •local transit funding (property tax, sales tax etc.) •air quality mandates •environmental and energy policies
Land use/development patterns and policies	<ul style="list-style-type: none"> •suburbanization residential/employment relocation •increased density •land use/zoning controls
Parking policies	<ul style="list-style-type: none"> •parking costs and availability

Potential ridership growth opportunities

1

Fare policy changes

2

Service changes & enhancements

1. Accommodate growth
2. Restore Service Standards
3. Enhance Service Standards

3

Improve speed and reliability

4

Improve integration with other agencies and modes

5

Enhance the customer experience

6

Influence external factors

1. Fare policy changes



Fare Capping

Customers travel for free after paying for a set number of rides within a specific period (day, week or month)

Description	Proposed Fare Change	Annual Revenue Impact	Annual Ridership Impact
	Free after 32 rides	-\$100M	+51.6M
	Free after 40 rides	-\$35M	+16.8M
	Free after 47 rides, no change for post-secondary	-\$10M	+3.6M
	\$100 cap for Fair Pass	-\$1.7M	Based on current usage level
	+\$0.10 (all fares)	+\$32.7M	-0.5M
	+\$0.25 (all fares)	+\$68.5M	-5.5M
	+\$0.35 (all fares)	+\$92.6M	-8.5M
	+\$1.10 (all fares)	+\$256.0M	-30.9M
	+\$3.70 (all cash fares only)	+\$36.6M	-2.6M





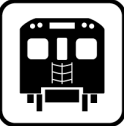
Fare Increases

Fare price increase from the start of year

Analysis completed as part of 2025 budget process using fall 2024 service levels




The fare capping and fare increase options presented are illustrative examples only. They are intended to support discussion and do not represent staff recommendations or final policy proposals."

2.1 Service enhancements to accommodate population & employment growth

		Annual Service Hours	Annual Operating Cost	Annual Revenue	Annual Net Impact	Annual Ridership Impact
	Bus	39,000	\$4.7M			
	Streetcar	9,100	\$0.9M	\$9.4M	(\$0.9M)	3.8M
	Subway	15,400*	\$2.9M*			
	Sub-Total	63,500	\$8.5M	\$9.4M	(\$0.9M)	3.8M







* Peak periods only.

2.2 Service enhancements to meet Service Standards

		Annual Service Hours	Annual Operating Cost	Annual Revenue	Annual Net Impact	Annual Ridership Impact
	Meet crowding standard	70,700	\$8.5M	N/A*	\$8.5M	N/A*
	Restore 10-minute network	41,700	\$5.0M	\$0.6M	\$4.4M	1.5M
	Restore express corridors to standard	62,600	\$7.5M	\$1.0M	\$6.5M	0.4M
	Sub-Total	175,000	\$21.0M	\$1.6M	\$19.4M	1.9M

* Add service to address crowding for existing riders to sustain current ridership. Periods of overcrowding run the risk of losing customers.

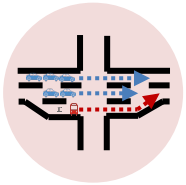
2.3 Service enhancements

		Annual Service Hours	Annual Operating Cost	Annual Revenue	Annual Net Impact	Annual Ridership Impact
	Expand and enhance express bus network (new routes)	115,400	\$13.9M	\$1.9M	\$12.0M	0.8M
	Expand early Sunday morning service	22,500	\$2.7M	\$1.8M	\$0.9M	0.7M
	Expand the frequent network (15-min network)	28,700	\$3.5M	\$1.2M	\$2.3M	0.5M
	Expand overnight network (new routes + 20-min service guarantee)	110,000	\$13.1M	\$1.3M	\$11.8M	0.5M
	Expand 6-min streetcar network	231,700	\$22.5M	\$7.5M	\$15.0M	3.1M
	All routes have maximum headway of 20-min	590,000	\$70.5M	\$20.0M	\$50.5M	8.3M
	Sub-Total	1,098,300	\$126.2M	\$33.7M	\$92.5M	13.9M

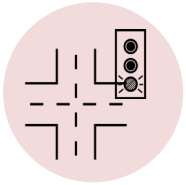
3. Improve speed and reliability



RapidTO



Queue Jump Lanes



Transit Signal Priority



Regulatory Measures



Improve Service Reliability

- Continuously review transit schedules
- Improve weekend and overnight schedules to reflect operating conditions
- Review service reliability metrics
- Deploy automated monitoring and operator training and counselling to improve on-time departures
- Evaluate the success of the active and passive route supervision pilot, implemented bunching / gapping pilot
- Review infrastructure at end-of-line points to ensure they meet operational needs

4. Improve integration with other agencies & modes



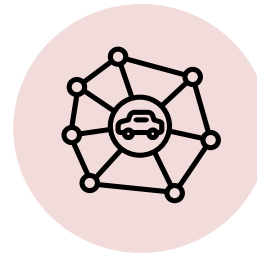
Service integration with regional transit partners



Enhance **active transportation connections** to TTC



Enhance integration with **cycling**



Improve **microtransit** and review **micromobility** connection opportunities

5. Enhance the Customer Experience



Implement a **New Customer Orientation Program**

Gen Z, Shift workers, Women, People with low income



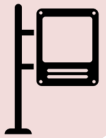
Make **150 stops accessible** per year

Gen Z, Shift workers, Women, People with low income



Upgrade existing and add **new inclusive station seating**

Gen Z, Shift workers, Women, People with low income



Trial solar-powered real-time signage at surface stops

Gen Z, People with low income



New signs and notices in stations to guide customers during delays and disruptions

Gen Z, Shift workers, Women, People with low income



Launch a pilot to **introduce tablets for Customer Service Ambassadors**

Gen Z, Shift workers, Women, People with low income



Implement **new public engagement and market research tools**

Gen Z, Shift workers, Women, People with low income



Safety research and consultation to better understand challenges experienced by women, girls and gender-diverse customers













Women



Explore implementation of a **Mystery Rider Program**

Gen Z, Shift workers, Women, People with low income

Not all ridership levers are equal

	Description	New Annual Revenue Rides	Change in Annual Operational Cost	Change in Annual Passenger Revenue	Change in Profit per Revenue Ride Change
RapidTO Transit Priority*	Impact of RapidTO transit priority (Dufferin corridor)		(\$\$)	\$\$	
Fare Decrease	Impact of ¢10 fare decrease		\$\$\$	(\$\$\$\$\$)	()
Fare Increase	Impact of ¢10 fare increase	()	(\$\$)	\$\$\$\$\$	
Service Change	Impact of 20-minute service guarantee		\$\$\$\$\$	\$\$\$\$\$	()
Fare Capping**	Impact of fare capping set at 40 (free after 40 rides)		\$\$\$\$\$	(\$\$\$\$\$)	()
Decrease Work from Home***	Impact if WFH decreases to 1 day per week (work from office 4 days per week)		\$\$\$\$\$	\$\$\$\$\$	

* Does not include one-time capital cost. Includes only new transit rides (not rides from elsewhere in the network). Analysis at the corridor level and not network-wide.

** Fare capping number of rides for example purposes only.

*** For illustrative purposes only of the impact of external factors on ridership. TTC is not advocating for this position.

Fare change and WFH analyses assume service hour change commensurate to ridership change.

Fare change analyses completed as part of 2025 budget process using fall 2024 service levels.

Draft Guiding Principles for discussion

- Prioritize initiatives that have greater return on investment than others
- Reduce points of friction in the customer journey
- Bundle complementary improvements for greater impact
- Leverage partnerships to extend reach and resources
- Partner with City on advocacy efforts
- Address key barriers to mode shift
- Improve reliability and reduce service interruptions
- Align with current standards and approved TTC Plans (e.g., Corporate Plan, 5YSP, etc.)
- Maximize use and efficiency of existing fleet and resources
- Focus initiatives on key customer groups – women, people with low income, and shift workers
- Ensure that the TTC remains affordable and equitable for customers
- Sustain ridership gains from fare and service initiatives through customer experience improvements

Next steps

Milestone	Timeline
Refine and develop draft RGS	Summer 2025
TTC Advisory Group consultation	Fall 2025
Strategic Planning Committee meeting	Fall 2025
Finalize RGS for TTC Board approval	Late 2025
TTC Board Budget Meeting	December 2025
Comprehensive review of Service Standards (including extensive consultations)	2026

