



# **2026-2028 Ridership Growth Strategy**

**Strategic Planning Committee**

September 4, 2025

# | Agenda

- Strategic Planning Committee September 4, 2025 item objective
- Recap of July 10 Strategic Planning Committee meeting
- Approach
- Guiding principles
- Ongoing ridership growth initiatives
- 2026 Budget enhancement recommendations
- Financial considerations

# | Strategic Planning Committee item objective

## **September 4 objective:**

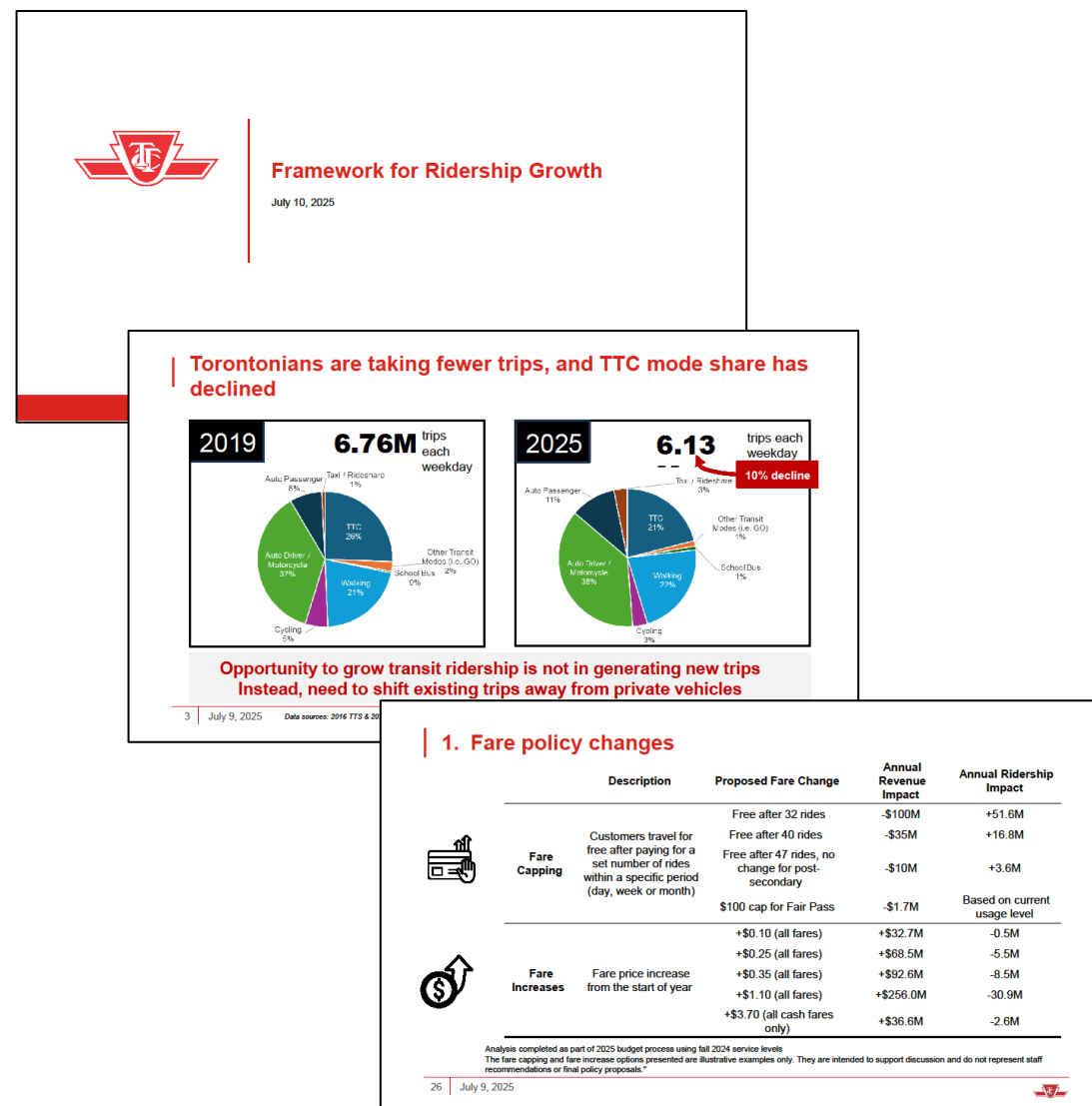
- Present guiding principles
- Inform Strategic Planning Committee of key initiatives for 2026
- Outline 2026 Budget enhancement recommendations
- Confirm Committee recommendations to the Board for 2026 Budget submission

# July 10 Strategic Planning Committee meeting recap

Staff presented key ridership trends and an outline of a draft Ridership Growth Strategy at the July 10, 2025 meeting

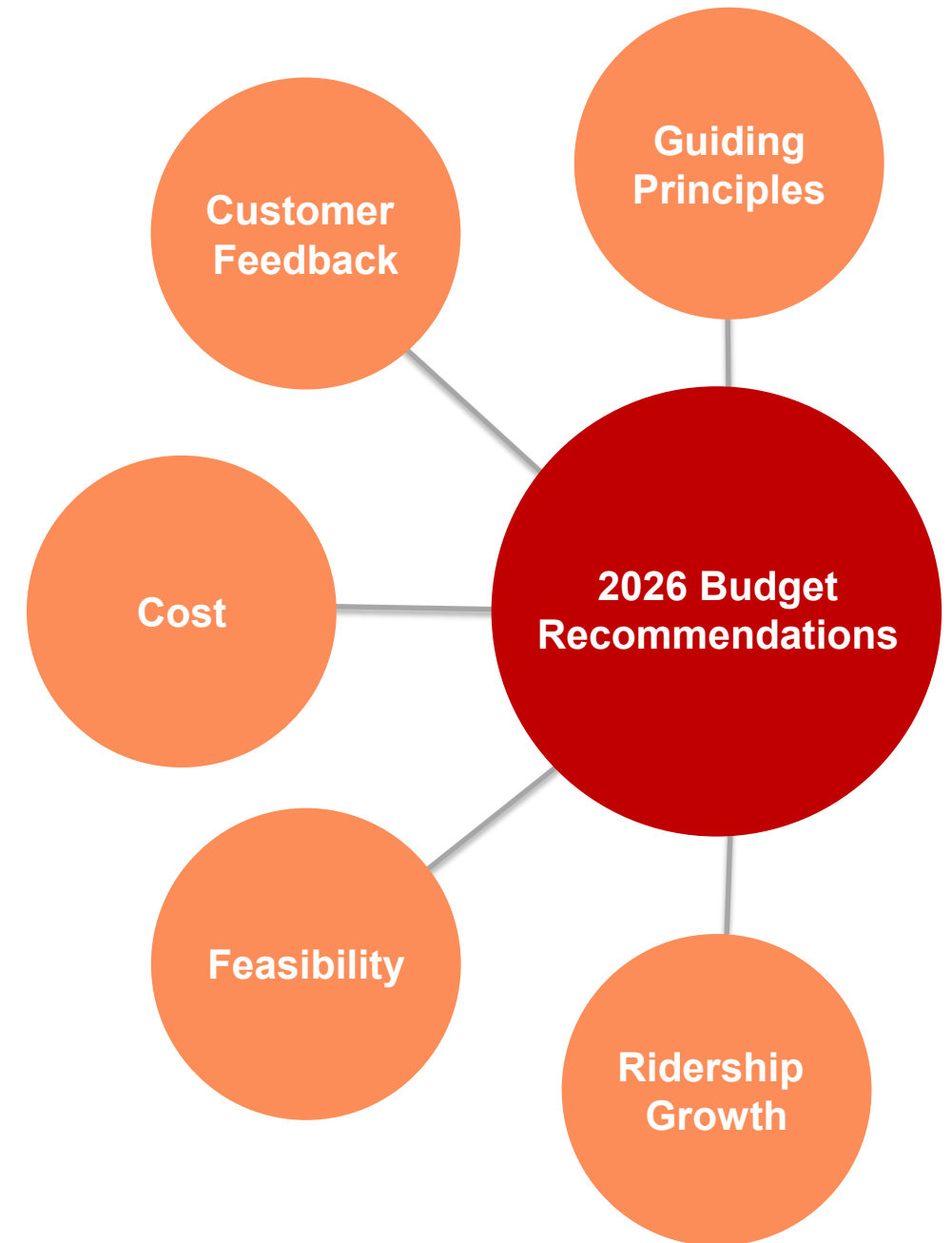
Presentation also included:

- Summary of previous TTC consultation efforts
- Discussion of previous TTC ridership growth-related documents
- Outline of factors that impact transit ridership (internal/external)
- Potential ridership growth opportunities (fare, service, etc.) and their ridership/revenue impacts
- Draft Guiding Principles to inform the new Ridership Growth Strategy



# | Approach

- Foundation of 2026-2028 Ridership Growth Strategy (RGS) established by *5-Year Service and Customer Experience Action Plan*
- 2026 RGS recommendations are based on:
  - Meeting the guiding principles
  - Alignment with customer feedback
  - Feasibility of implementation
  - Cost
  - Ridership growth potential



# | Guiding principles



## **Put Customers First**

- Place riders and their experiences at the forefront of decision making
- Ensure that the TTC remains affordable, accessible, and equitable for customers
- Focus on key customer groups (e.g. women, people with low income, and shift workers)
- Support the needs of frequent, occasional, and non-riders
- Address barriers to mode shift and reduce points of friction in the customer journey



## **Deliver Efficient, Reliable Service**

- Improve reliability and reduce service interruptions
- Maximize use of existing fleet and resources
- Bundle improvements for greater impact
- Leverage partnerships to extend reach and resources



## **Drive Results Through Transparency and Accountability**

- Align with the TTC's approved plans (e.g. Corporate Plan, 5YSP)
- Partner with the City on advocacy efforts
- Use and report on indicators, standards, and metrics that support reducing barriers to new ridership

# | Ongoing ridership growth initiatives

- **Address safety concerns** by continuing to implement actions from 5-Year Community Safety, Security and Well-being Plan
- **Improve service reliability** by advancing bunching and gapping pilot, reviewing service standards, and developing strategy for mid-route performance review
- **Subway station improvements**, including continuing the Cleanliness Pilot Project, upgrading station seating, and piloting tablets for Customer Service Agents
- **Pilot solar-powered real-time signage** at surface transit stops
- **Enhance customer research** by expanding dashboard capabilities to share analytics and strategic recommendations across the organization
- **Complete an experience review of TTC.ca** to make it more user-friendly

# Potential service reallocation strategies

Ridership across the TTC network will be monitored through fall and winter 2025 to adjust service in 2026 to match capacity to demand, per TTC Service Standards



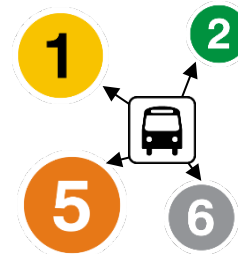
**Monitor demand from post-secondary institutions** from lower forecast enrolment – opportunity to reallocate service to other system needs if demand falls significantly



**Review Line 3 Bus Replacement Network** and reallocate resources to improve service in Scarborough and respond to shifts in travel demand. Other changes may result from the completion of the **Scarborough Busway**



**Post-implementation review** of 2025 service investments and utilization/ridership response



**Monitor impacts of LRTs on bus network demand**, especially for Line 2 connections, where demand may distribute differently on north-south corridors



**Reinvest LRT bus network savings** currently allocated for LRT service contingency



# Potential ridership growth initiatives

## 2026 Recommendations

- **Replace monthly passes with fare capping**
- **Implement Wayfinding Strategy**
- **Accommodate ridership growth from return to work policies**
- **Improve service reliability**
- **Implement outstanding 2024/2025 Annual Network Plan (ANP) proposals**
- **Meet Service Standards (Crowding, Express Network, 10-Minute Network)**
- Expand and enhance Express bus network
- Expand and enhance frequent network
- Expand early morning Sunday service
- Expand and enhance overnight service
- Refine and adopt transportation equity measures
- Continue to implement RapidTO
- Continue to implement targeted transit priority measures (regulatory, transit signal priority, queue jump lanes)
- Expand service integration
- Enhance integration with cycling, pedestrian pathways, and micromobility
- Improve comfort and convenience of stop areas, stations, and vehicles
- Explore implementation of a Mystery Rider Program
- Explore implementation of a New Customer Orientation Program
- Review/research fare policy initiatives once new PRESTO features are available

# | 2026 Budget enhancement recommendations



- Replace monthly passes with fare capping
- Implement Wayfinding Strategy
- Accommodate ridership growth from return to work policies
- Improve service reliability
- Implement outstanding 2024/2025 Annual Network Plan proposals
- Meet Service Standards (Crowding, Express Network, 10-Minute Network)



# Replace Monthly Passes with Fare Capping

Initiative	Monthly Fare Cap (with current single ride prices)	2026 Operating (M)	2026 Revenue (M)	2026 Net Cost to TTC (M)	2026 Ridership Impact (M)
Fare Capping – Free after 47 rides/month	Adult: \$155.10 Youth: \$110.45 Senior: \$105.75 Fair Pass: \$98.70	-	\$(10.0)	\$10.0	3.6
Fare Capping – Free after 44 rides/month	Adult: \$145.20 Youth: \$103.40 Senior: \$99.00 Fair Pass: \$92.40	-	\$(19.0)	\$19.0	7.2
Fare Capping – Free after 40 rides/month	Adult: \$132.00 Youth: \$94.00 Senior: \$90.00 Fair Pass: \$84.00	-	\$(35.0)	\$35.0	16.8

## Benefits:

- Puts customers first by rewarding frequent riders (free trips after cap) and infrequent riders (no commitment)
- Simple and affordable: no upfront pass needed or worry about overpaying
- Improves access to One Fare Program for cross-boundary trips

### Customer groups benefitting:





# | Implement Wayfinding Strategy

- Implement Year 1 of Wayfinding Strategy (*pending Board approval*)
  - Three pilot stations (Dundas, St George, Finch West)
  - Platform boarding mats (Dundas, St George, Finch West, Union, St Andrew, Bathurst, Dufferin, Kipling, Bloor-Yonge)
  - Increased digital customer experience capabilities in-house
- \$2.385 million budget required

## Benefits:

- Engagement with customers at pilot stations to receive feedback on changes before implementing system-wide
- Platform boarding mats assist with station capacity, service improvements
- Exit numbering in high-traffic stations (Union, St Andrew, Bathurst, Dufferin, Kipling, and Bloor-Yonge) improving navigation

### Customer groups benefitting:





# Accommodate ridership growth from return to work policies

Initiative	2026 Operating Cost (M)	2026 Revenue (M)	2026 Net Cost to TTC (M)	2026 Ridership Impact (M)
Increase subway service to accommodate change in WFH policies	\$10.9	\$60.4	\$(49.5)	24.9

- Many employers have announced work from home policy changes for fall 2025
- Banking industry alone, shifting to four days in office, is expected to increase demand by 8% during peak periods from today's levels
- Targeted subway service investment to support anticipated ridership growth

## Benefits:

- Puts customers first
- Benefits all riders

### Customer groups benefitting:





# | Improve Service Reliability

- Additional Surface Operations Supervisors to support route management
- Additional resources to support/advance implementation of transit signal priority
- \$1.624 million required

## Benefits:

- Puts customers first
- Improves reliability
- Maximizes use of existing fleet and resources
- Consistently one of the highest priority areas identified during consultations

### Customer groups benefitting:





# Implement outstanding 2024/2025 Annual Network Plan proposals

Initiative	2026 Operating Cost (M)	2026 Revenue (M)	2026 Net Cost to TTC (M)	2026 Ridership Impact (M)
Implement outstanding 2024/2025 ANP Proposals	\$15.5	\$2.3	\$13.2	0.9

- Includes Blue Night Network changes, two new Express bus routes in the Line 5 and Line 6 Network Plan, and revisions to regular bus routes

## Benefits:

- Puts customers first
- Supports shift workers, women, and people with low income
- Holds TTC accountable for consultations
- Responds to customer feedback

### Customer groups benefitting:





# Meet Service Standards (Crowding, Express Network, 10-Minute Network)

Initiative	2026 Operating Cost (M)	2026 Revenue (M)	2026 Net Cost to TTC (M)	2026 Ridership Impact (M)
Service Up to Standard (Crowding, Express Network, 10-Minute Network)	\$21.0	\$1.6	\$19.4	1.9

- Crowding: 64 time periods on 39 routes
- Express Network: 27 time periods on 10 routes
- 10-Minute Network: 46 time periods on 11 routes

## Benefits:

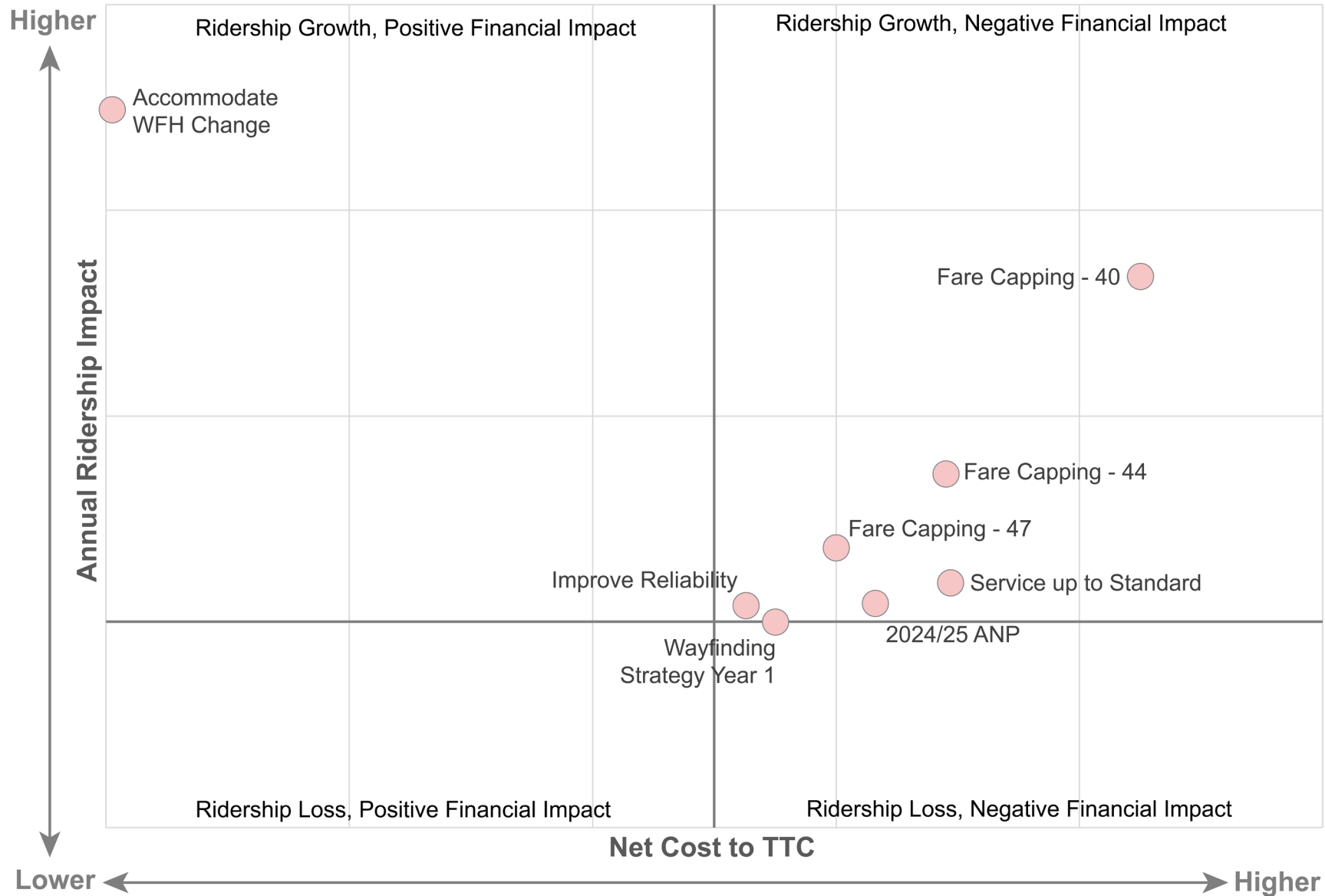
- Puts customers first
- Positive impact for all riders
- Holds TTC accountable to Service Standards

### Customer groups benefitting:





# Growth initiatives deliver varying impacts



# | Financial considerations

- Given the financial constraints currently facing the City of Toronto and the TTC, there are opportunities to offset the cost of initiatives within the Ridership Growth Strategy through changes, including:
- Internal levers:
  - Fare increases
  - Cash harmonization
- External levers:
  - Rideshare levy

# Fare increase revenue and ridership impacts

Category	Description	Annual Revenue (M)	Annual Ridership Impact (M)
<b>Full Year Fare Increases to all Cash fares</b>	+\$0.10	\$2.2	-0.03
	+\$0.25	\$4.6	-0.30
	+\$0.35	\$6.2	-0.50
<b>Full Year Fare Increases to all PRESTO Single Ride Fares</b>	+\$0.05	\$15.0	0.00
	+\$0.10	\$27.6	-0.40
	+\$0.25	\$57.8	-4.30
	+\$0.35	\$78.2	-6.60
<b>Full Year Fare Increases to all Fares</b>	+\$0.05	\$17.7	0.00
	+\$0.10	\$32.7	-0.50
	+\$0.15	\$45.5	-2.00
	+\$0.25	\$68.5	-5.50
	+\$0.35	\$92.6	-8.50

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

## Opportunity:

- Consider increasing Cash fares by more than PRESTO fares
- Incentivizes shift from Cash to PRESTO/credit/debit payment
- Potential for lower (or no) fare increase for more frequent riders

# Cash harmonization

Category	Description	Annual Revenue (M)	Annual Ridership Impact (M)
<b>Full Year Cash Harmonization (Single Cash Fare)</b>	Single cash fare: \$3.35	\$1.7	-1.0
	Single cash fare: \$3.50	\$4.3	-1.2
	Single cash fare: \$3.75	\$7.5	-1.8

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

## Benefits:

- Enable removal of cash fareboxes and transfer machines at stations
  - Cash can continue to be used at Fare Vending Machines
  - Delivers on July 2024 Board direction to close crash gates
- Reduce fare evasion by requiring a PRESTO card to use concession fares
- Continue the TTC's transition to PRESTO, as required by the 2012 TTC-MX agreement
- Encourages customers to adopt PRESTO, enables access to two-hour transfers, and the One Fare Program

# | Rideshare levy

- Large cities across North America have implemented rideshare levies as an additional source of municipal revenue:
  - New York City: ~CA\$451 million annual revenue
  - Chicago: ~CA\$55 million annual revenue
  - Washington, DC: ~CA\$25 million annual revenue
- A rideshare levy in Toronto *could*:
  - Provide the City/TTC with an additional source of revenue
  - Help convert rideshare trips into transit trips (or another sustainable mode)
  - Reduce overall traffic and improve speed and reliability of transit vehicles
- Authority under the *City of Toronto Act* would need to be established before proceeding with a rideshare levy

# | Planning Advisory Group feedback

## **Feedback on 2026 Budget enhancement recommendations:**

- Participants supported prioritizing recommendations that improve service reliability and frequency
  - Some suggested small changes with high impact for retaining and attracting riders, e.g., improving wayfinding and keeping stations and vehicles clean and comfortable
- Strong support for fare capping
  - Participants noted that it could reduce fare evasion, as customers will need to pay to qualify
- Participants agreed that the Service Standards should be reviewed
- Strong opposition to a fare increase
  - If one is necessary, there needs to be clear benefits (lower fare cap, better CX, more service, etc.)

## **Other feedback and advice**

- Safety is an important factor for ridership growth, especially for women and gender-diverse people

## | Next steps

- Refine and finalize ridership growth initiatives in the 2026 Budget submission based on Committee feedback
- Report back with the final 2026-2028 Ridership Growth Strategy after budget approval

# | Recommendations

1. Endorse the following ridership growth initiatives for 2026 and recommend that staff include budget requests to implement them in the TTC's 2026 Operating and Capital Budget submission:
  - Replace monthly passes with fare capping
  - Implement Year 1 of the TTC Wayfinding Strategy (pending Board approval)
  - Support increased ridership from change in work from home policies
  - Improve service reliability
  - Implement outstanding 2024 / 2025 Annual Network Plan proposals
  - Meet Service Standards for crowding, express network routes, and the 10-minute network
2. Request staff to report back to the Strategic Planning Committee following the approval of the 2026 Operating and Capital Budgets with a final 2026-2028 Ridership Growth Strategy



# Budget impact for 2026 ridership growth initiatives

Initiative	2026 Operating Cost (M)	2026 Capital Cost (M)	2026 Revenue (M)	2026 Net Operating Impact (M)	2026 Ridership Impact (M)
1a. Fare capping: free after 47 rides / month	-	-	\$(10.0)	\$10.0	3.6
1b. Fare capping: free after 44 rides / month	-	-	\$(19.0)	\$19.0	7.2
1c. Fare capping: free after 40 rides / month	-	-	\$(35.0)	\$35.0	16.8
2. Implement Year 1 of Wayfinding Strategy	-	\$2.385	-	-	-
3. Increase subway service to accommodate change in WFH policies	\$10.90	-	\$60.4	\$(49.50)	24.9
4. Improve service reliability	\$1.62	-	-	-	-
5. Implement outstanding 2024 / 2025 ANP Proposals	\$15.50	-	\$2.3	\$13.2	0.9
6. Service Up to Standard	\$21.00	-	\$1.60	\$19.40	1.90



# Icons

## *Guiding Principle Alignment*



Put Customers First

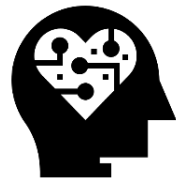


Deliver Efficient,  
Reliable Service



Drive Results Through  
Transparency and  
Accountability

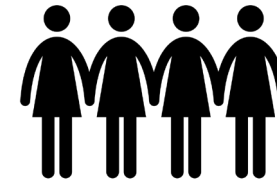
## *Priority Customer Groups*



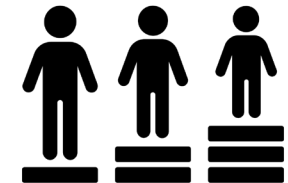
Gen Z



Shift workers



Women



Customers with low-  
income

## *Frequency of TTC Use*



Infrequent riders



Moderate riders



Frequent riders

# | Guiding principles

## Draft Guiding Principles

- 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

## July 10 SPC Meeting Motions:

Motion to Amend Item (Additional) moved by Councillor Jamaal Myers (*Carried*)

That the Toronto Transit Commission – Strategic Planning Committee:

1. Amend the eleventh bullet in the draft guiding principles to read: Ensure that the TTC remains affordable, accessible, and equitable for customers

Motion to Amend Item moved by Councillor Alejandra Bravo (*Carried*)  
That the Toronto Transit Commission – Strategic Planning Committee amend Recommendation 2 by adding the following:

2. Endorse the draft ridership growth guiding principles, and add the following additional guiding principles:
  - Centre riders and ensure that their experience informs and drives decisions
  - Use and report on indicators, standards, and metrics that support reducing barriers to new ridership
  - Ensure accountability and transparency

# Fare Capping is rapidly becoming the industry standards

		Daily		Weekly		Monthly	
City (Year Implemented)		Trips	Cost	Trips	Cost	Trips	Cost
Greater Toronto	GO Transit (2012)					40	Varies
	Burlington (2020)					40	\$110.00
	York Region (2024)					40	\$164.80
	Mississauga (2012)			11	\$46.75		
	Hamilton (2013)			11	\$31.35		
	Brampton Transit (2020)			12	\$40.80		
International	London (2005) (1 zone)	3	\$16.60 CAD	~16	\$83.37 CAD		
	Portland (2017)	2	\$5.60			~36	\$100.00
	New York (2022)			12	\$34.00 USD		
	Los Angeles (2023)	~3	\$5.00 USD	~10	\$18.00 USD		

- Customers are guaranteed the best price based on usage, while a monthly pass may result in overpayment.
- Removes the burden of paying for a pass upfront.
- Incentivizes shift of cash paying customers to PRESTO, aligned with Fare Modernization goals.

# Monthly Pass Use and Cash Payment Continues to Decline

**Weekly  
ridership by  
fare type  
2023-2025**

