



# Ridership Growth Strategy

**2026-2028**

March 31, 2026

# How we got here

## Motion Adopted at Feb 11, 2025 City Council Meeting

City Council request the Toronto Transit Commission direct the Chief Executive Officer to develop a multi-year operating budget that **decreases the Toronto Transit Commission's reliance on property tax increases** by:

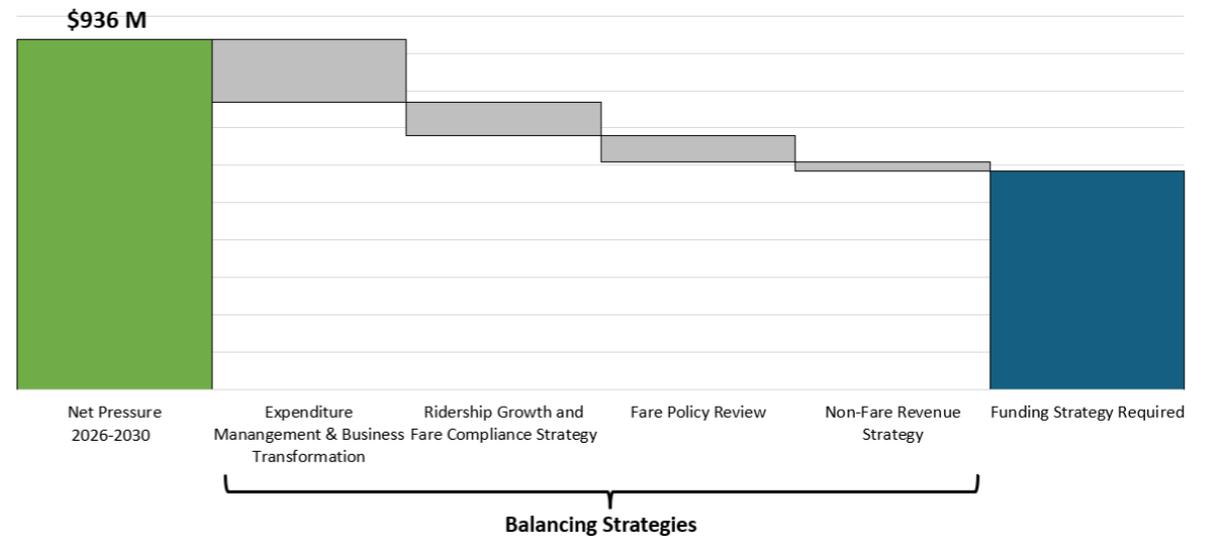
- advocating to other orders of government for long-term sustainable funding;
- reviewing the **Fare Policy, Fare Collection Outlook, and Ridership Growth Strategy**; and
- implementing the recommendations of the Auditor General on **fare evasion**

## Motion Adopted at Jan 10, 2025 TTC Board Meeting

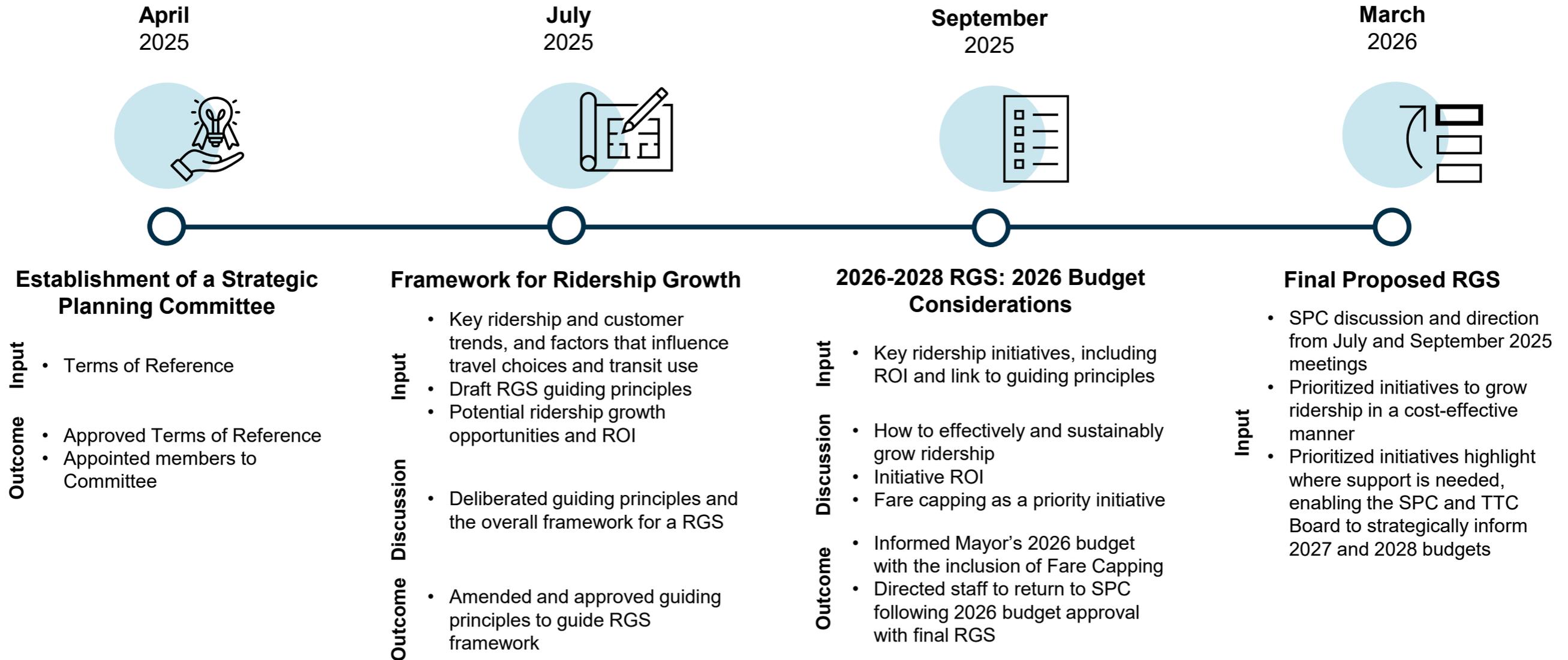
Commissioner Bravo moved the following motion:  
That the Toronto Transit Commission Board:

- Establish a Strategic Planning Committee** to assist the TTC Board in managing strategic planning and priorities, including through a **Ridership Growth Strategy** and other existing strategic documents

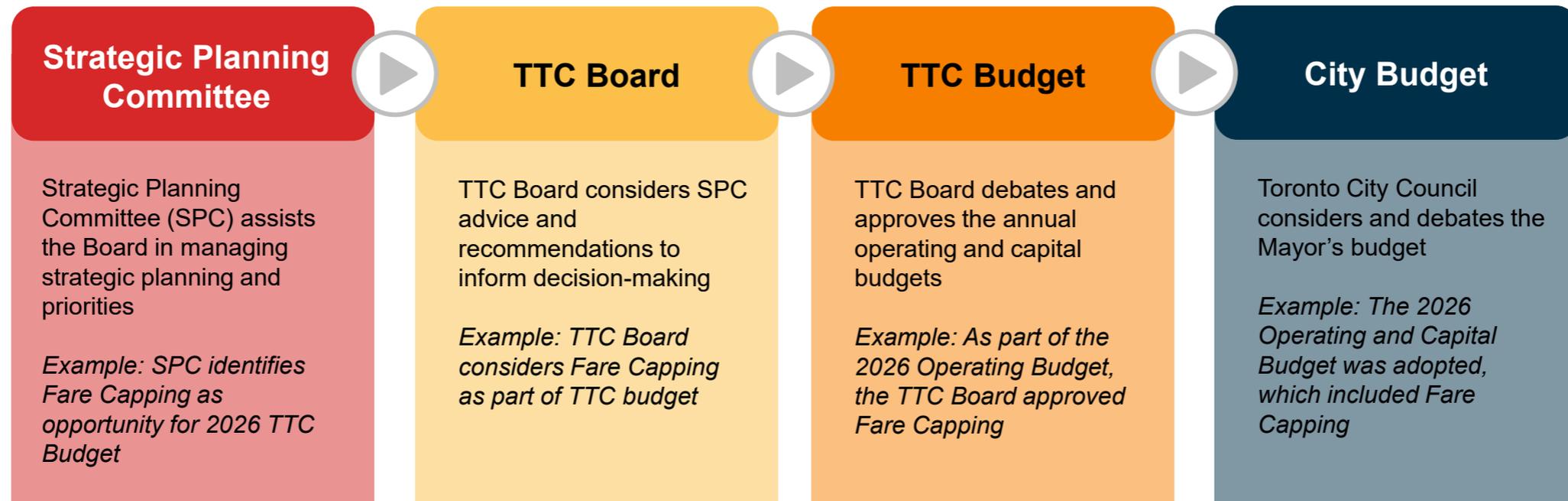
## Balancing Budget Long Terms Requires a Funding Strategy



# How we got here



# How SPC informs decision making



# | Then and now

**2003**



**2026**

**Strategic  
Direction**

- 2024-2028 Corporate Plan

**Operational  
Strategies and  
Plans**

- 5-Year Service & Customer Experience Action Plan
- Annual Network Plan
- 5-Year Accessibility Plan
- Community Safety, Security and Well-being Plan
- Innovation & Sustainability Strategy
- 2026-2028 Ridership Growth Strategy
- RapidTO (City of Toronto)

**Budgeting &  
Long-term  
Plans**

- 2003 Ridership Growth Strategy
- Annual Operating Budget
- Capital Program and 10-Year Capital Forecast

- Annual Operating Budget and 2-Year Outlook
- 10-Year Capital Plan, 15-Year Capital Investment Plan, and 15-Year Real Estate Investment Plan
- Long-Term Financial Plan



# | Purpose

- Provide an update on current ridership trends and present a three-year plan that outlines specific recommendations to grow ridership
- Prioritized initiatives highlight where support is needed, enabling the SPC and TTC Board to strategically inform 2027 and 2028 budgets
- Gain endorsement from the SPC to deliver the Ridership Growth Strategy to the Board



# Short-term volatility persists

## Post-COVID

- Fewer office commutes
- Market/discretionary trips doubled their share
- Bus recovered faster than rail

## Most recent trends

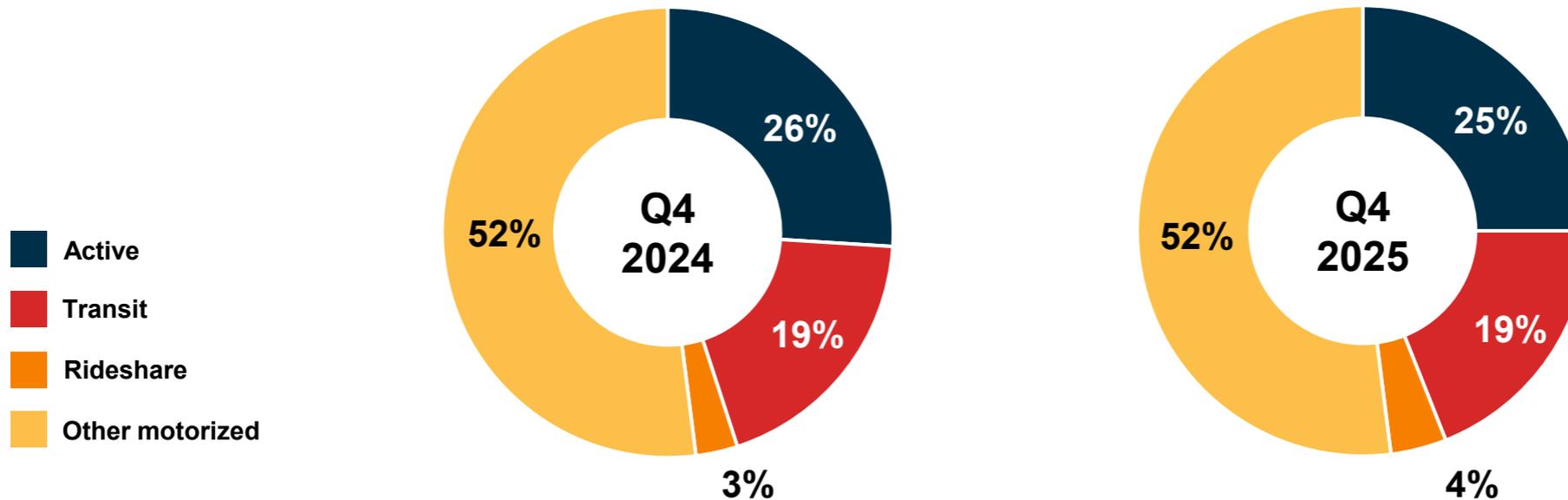
- Bus ridership is declining
- Fewer discretionary and shift worker trips
- Largest declines occur in off-peak



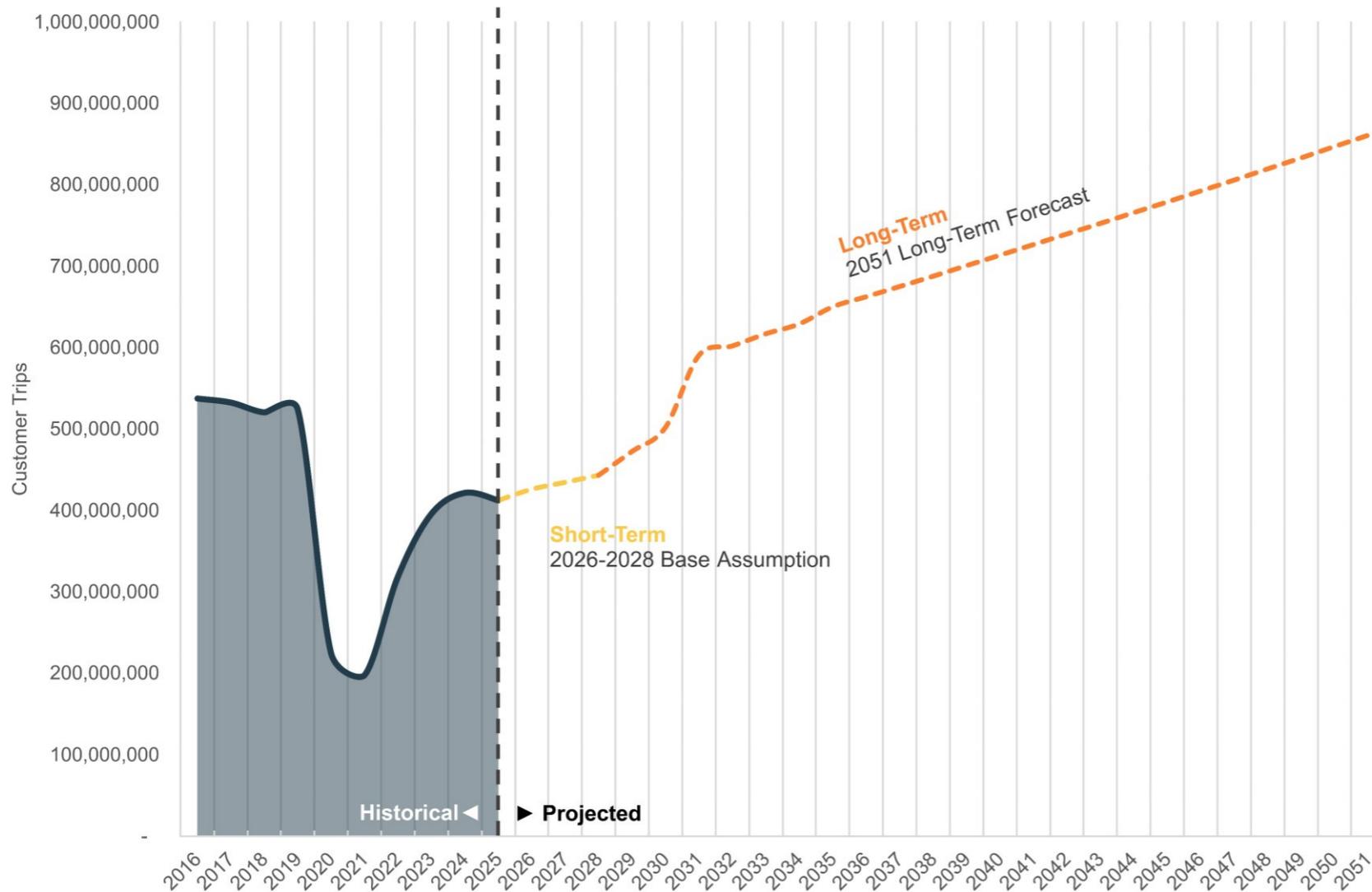
# Fewer trips are being made across all modes

- Residents are making less trips in 2025 than in 2024 on all transportation modes (6.6M average weekday trips in Q4 2024 vs. 6.4M in Q4 2025)
- Transit mode share remained unchanged in the city

Weekly Mode Share – City of Toronto



# Long term outlook remains positive



- Long-term case for transit investment remains intact



# | What prevents TTC from winning the trip?



## Frequent Rider Farah

- Lives in Liberty Village; commutes daily to Union by transit.
- Concerned about rising costs and exploring cheaper options like Bike Share.
- Recent crowding and return-to-office pressures are making her question transit reliability and comfort.



## Occasional Rider Oliver

- Midtown resident who mixes transit, Bike Share, and ride share.
- Prefers ride share because real-time trip info helps him plan.
- Transit feels unpredictable due to inconsistent bus arrivals.



## Non-rider Nancy

- Former rider who now drives or uses ride share.
- Struggled with wayfinding on transit and lost confidence due to safety concerns highlighted in the media, leading her to stop riding.

# Opportunity

- With fewer trips overall, ridership growth depends on strategy
- TTC must win mode share by delivering **fast, affordable, safe, and seamless service** — making transit the preferred choice when people travel



# Affordable

**Advances equity and inclusion**

**Enables economic participation**

**Supports climate and health outcomes**



# | Fast



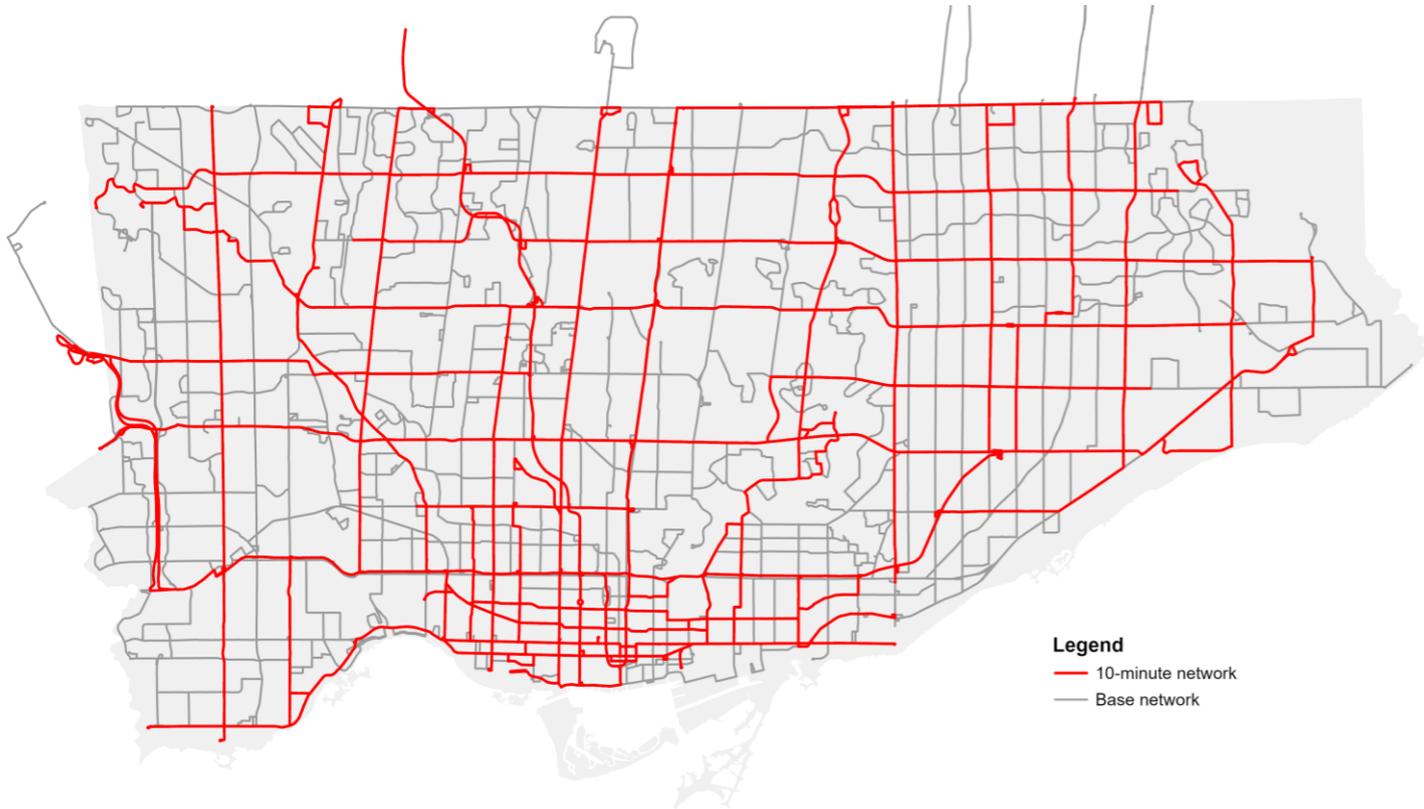
**Makes transit competitive**

**Expands access to jobs  
and opportunities**

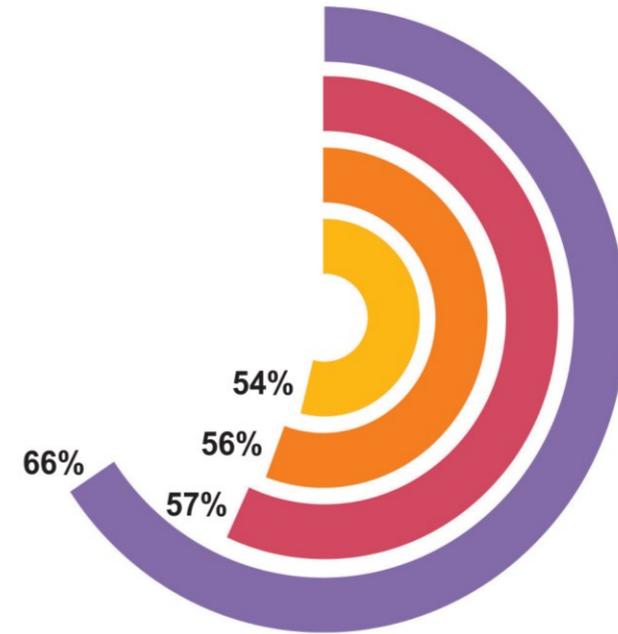
**Improves productivity and  
quality of life**



# More frequent service expands access



Total Population

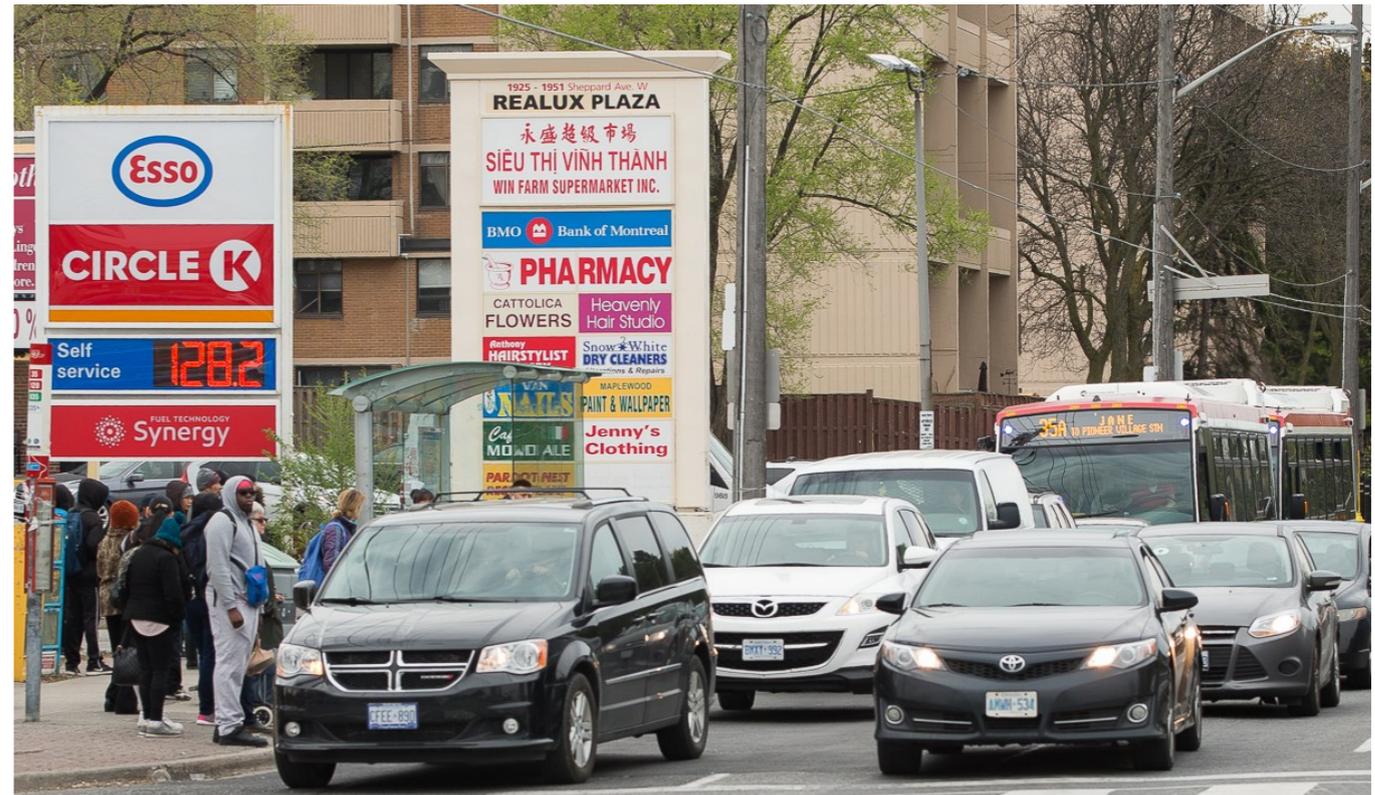


Percentage of the total population within a five-minute walk of frequent transit (10 minutes or better)



# Slower speeds restrict expansion of access

- Surface transit has gotten slower over time
- Between 2019 and 2024, trips along Jane corridor are 11% (13 min) slower during the afternoon rush hour
- Maintaining the same frequency requires:
  - **5 additional buses**
  - **\$1.7 M / year** in additional operating costs



# Service and fare improvements drive mode shift CX initiatives make those changes “stick”



## Service + Fare Levers

*(Primary Drivers of Ridership)*

- Faster travel times
- More reliable service
- Better network coverage
- More affordable pricing



## Customer Experience Levers

*(Supporting, Complementary Drivers)*

- Comfort & cleanliness
- Safety (perceived & actual)
- Accessibility
- Convenience & ease of use
- System perception

## Customer experience improvements support ridership growth by:

- **Retaining existing riders** by addressing pain points that contribute to ridership loss
- Encouraging occasional users to ride **more frequently**
- **Reducing friction for those close to switching modes**, particularly in response to changes in service or life circumstances

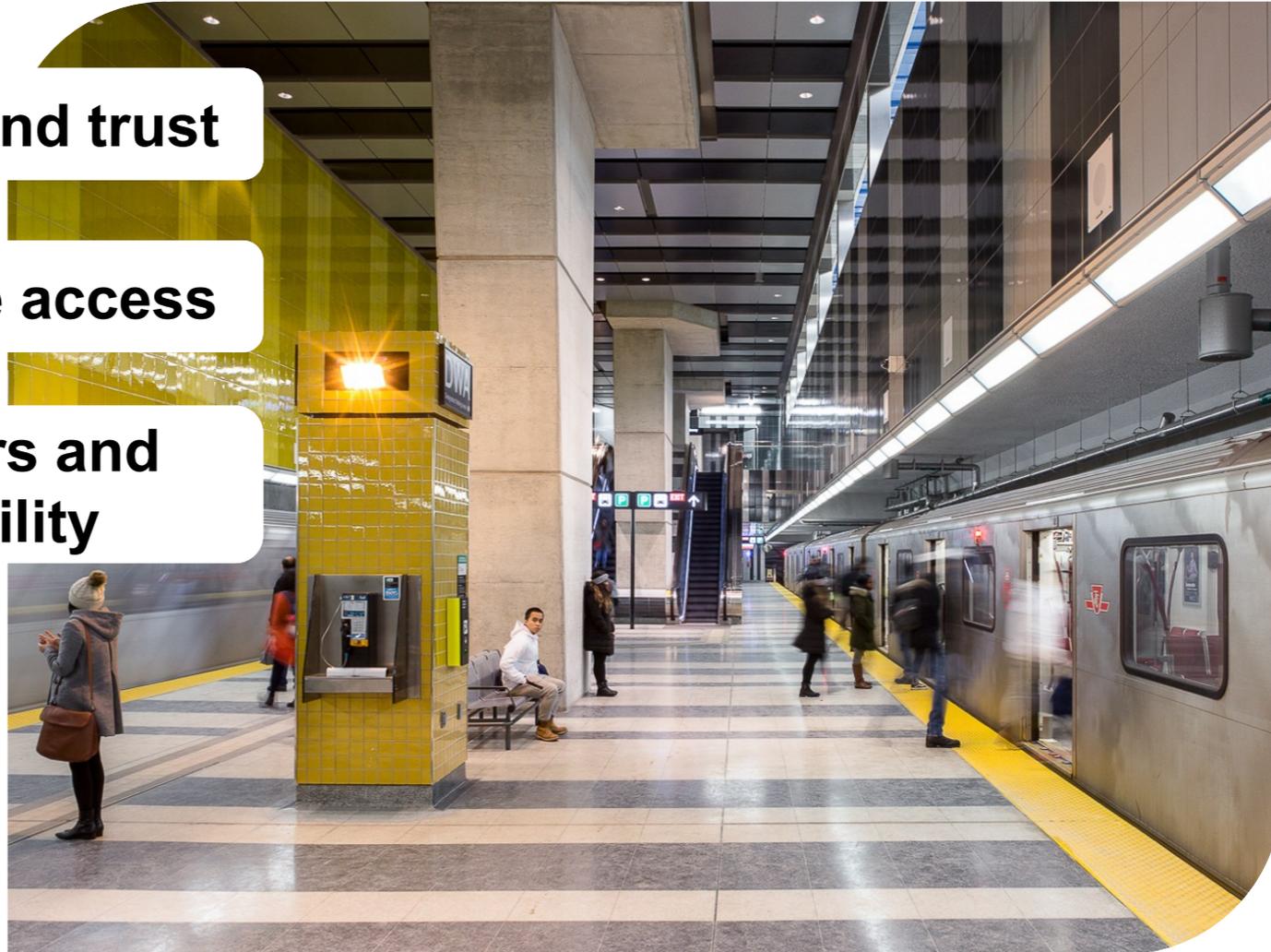


# Safe

**Drives ridership and trust**

**Enables equitable access**

**Protects workers and  
service reliability**



# Seamless

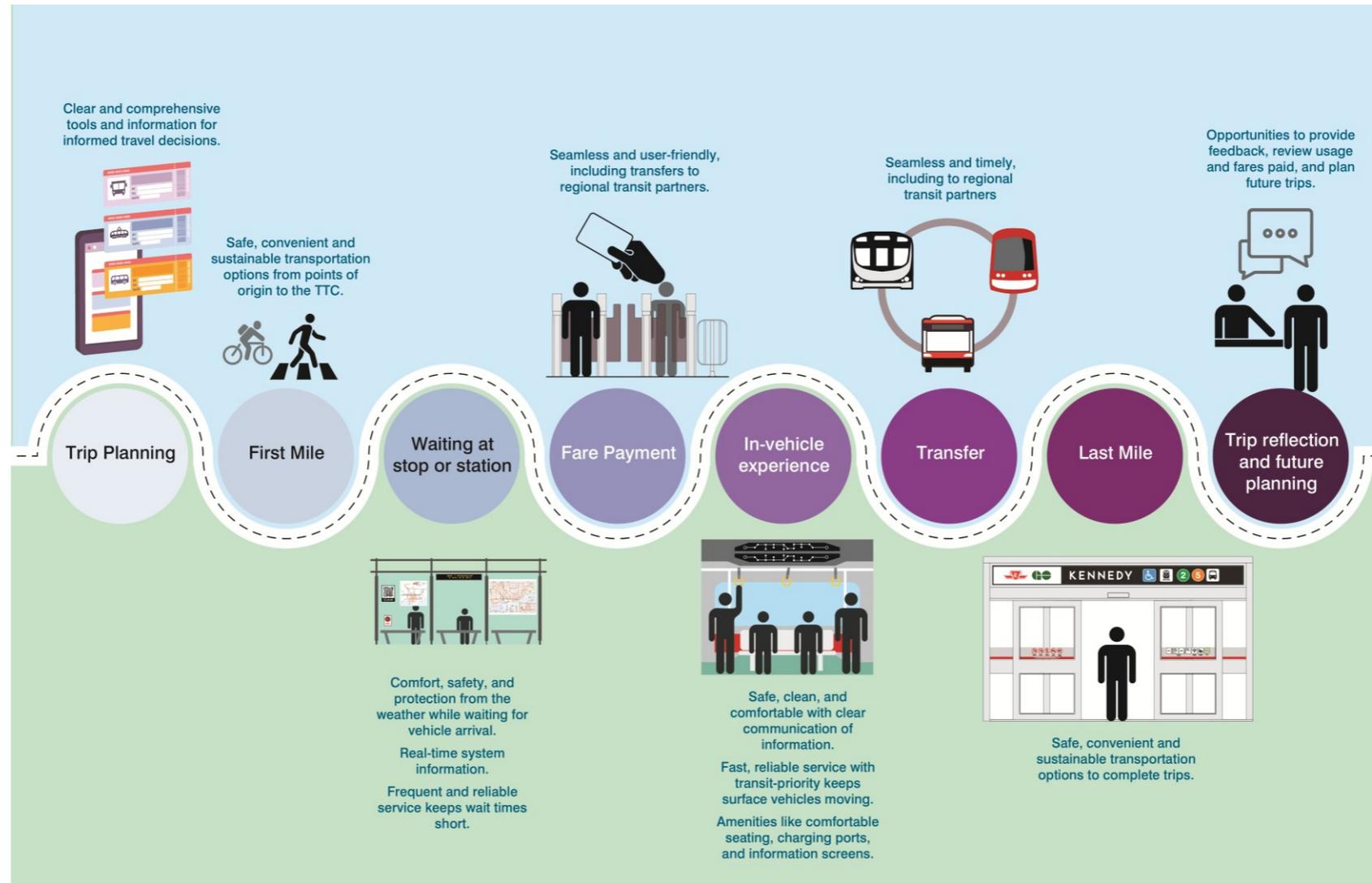
**Builds public trust and retention**

**Shapes perceived reliability and mode choice**

**Benefits City mobility goals**



# Improving the end-to-end customer journey



# | Proposed Action Plan

- Sets out priority actions to grow ridership over the next 3 years
- Builds on 2024-2028 5-Year Service and Customer Experience Action Plan and 5-Year Fare Policy



# Affordable

2026	2027	2028
Fare freeze for the 3 <sup>rd</sup> year in a row Introduction of fare capping	Review customer trends and explore opportunities to further enhance fare capping	
Continue to work on fare modernization		
TTC and the City of Toronto continue Fair Pass Program partnership		



# Fast

2026	2027	2028
Reinvest LRT network efficiencies in service improvements  Comprehensive review of Service Standards	Restore service up to standards  Implement outstanding 2024 and 2025 ANP initiatives	Enhance service beyond standards (express bus, frequent network, early morning Sunday service, overnight network, 6-min streetcar)
<b>RapidTO:</b> Complete feasibility studies and public consultations, and seek approvals for the installation of RapidTO Finch Avenue East, Lawrence Avenue East, and Dufferin Street (Phase 2)		
Implement up to 15 locations of <b>regulatory transit priority</b> measures each year		
Red paint applied at strategic locations		
Install or update <b>Transit Signal Priority</b> at 50 locations each year and implement ATSP		
Construct 4 <b>Queue Jump Lanes</b>	Design and construct up to 7 locations	



# Safe

2026	2027	2028
<p><b>Extension of LOFT’s Multi-Disciplinary Outreach Team</b></p>	<p><b>Ongoing implementation of the TTC Community Safety, Security, and Well-being Plan (2024-2028):</b></p> <ul style="list-style-type: none"> <li>• Conduct community safety events by leveraging partnerships</li> <li>• Issue more customer campaigns to improve awareness</li> <li>• Coordinate incident response through Transit Control</li> <li>• Participate in Working Groups with stakeholders focused on key community safety issues</li> <li>• Continue to work on improving security features on vehicles and facilities</li> </ul>	
<p><b>Deployment of Neighbourhood Community Officers (NCOs)</b></p>		
<p><b>Staffed Transit Special Constable desk within Transit Control on a 24/7 basis</b></p>		
<p><b>Pilots:</b></p> <ul style="list-style-type: none"> <li>• Track intrusion detection</li> <li>• AI for suicide prevention</li> <li>• Bus Collision avoidance technology</li> </ul>	<p>Continue exploring new and emerging technologies to enhance safety, such as predictive safety and threat detection, vehicle collision avoidance systems, and platform edge LED lighting</p>	



# Seamless

2026	2027	2028
<b>Wayfinding</b> <ul style="list-style-type: none"><li>• St George wayfinding pilot design</li><li>• Station exit numbering: 6 stations</li><li>• Platform boarding mats: 5 stations</li></ul>	<b>Continue implementing the TTC Wayfinding Strategy</b>	
<b>Improve Real-Time Information</b> <ul style="list-style-type: none"><li>• Digital stop signage: Pilot installed at 72 stops on the surface network</li><li>• GTFS.RT: Consolidation of all service alert and service advisories into one feed</li><li>• Google Pathways</li></ul>	<b>Customer Onboarding, Engagement, and Insights</b> <ul style="list-style-type: none"><li>• New Customer Orientation Program</li><li>• New Public Engagement Tools</li><li>• Explore a Mystery Rider Program</li></ul>	
<b>Improve the TTC.ca experience</b>		

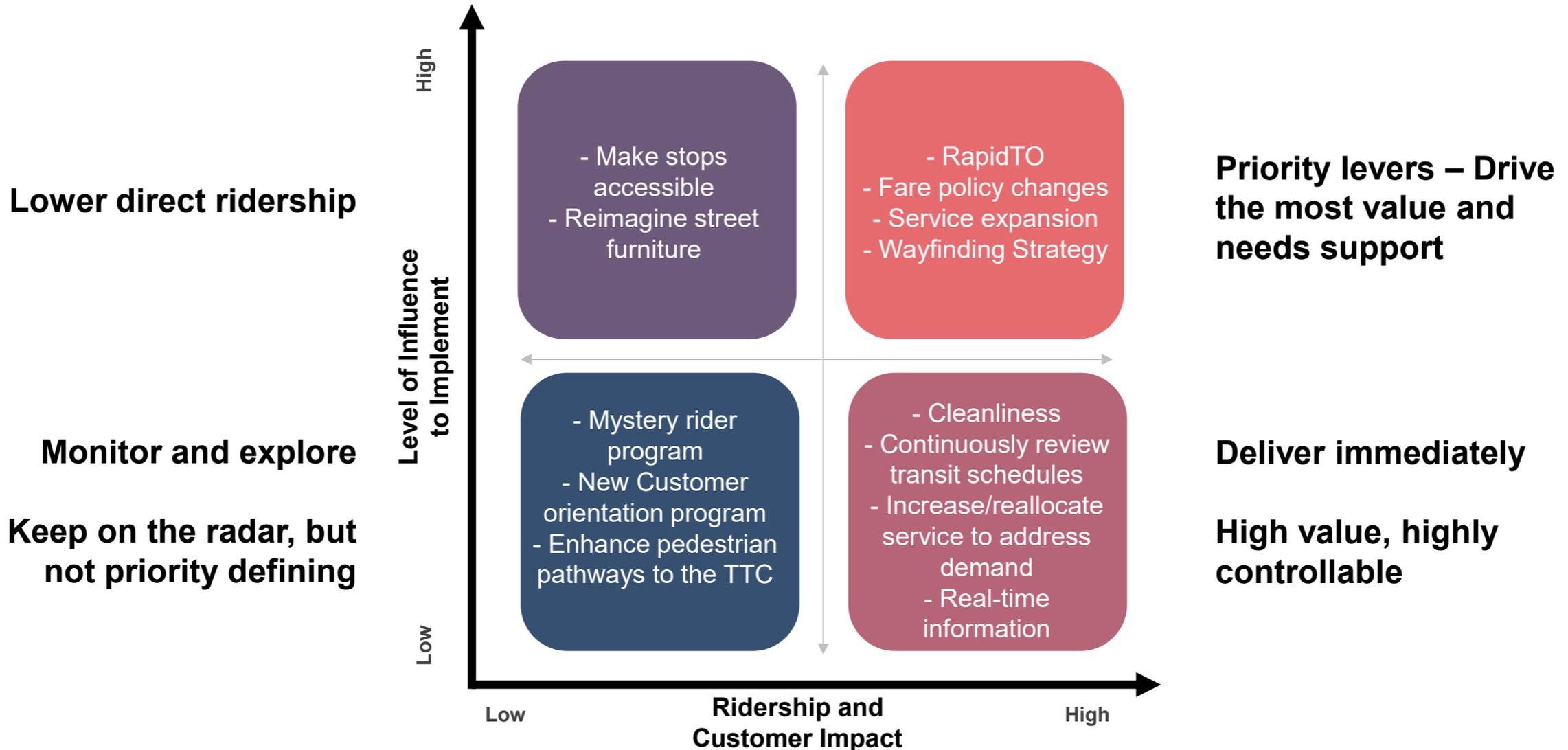


# Seamless

2026	2027	2028
<p><b>Ease of Payment</b></p> <ul style="list-style-type: none"> <li>• E-Tickets (Convention Passes)</li> <li>• Machine Readable Transfers (Phase 1)</li> </ul>	<p><b>Ease of Payment</b></p> <ul style="list-style-type: none"> <li>• Continue to explore opportunities to expand E-Tickets for a variety of use cases</li> <li>• Cash Harmonization</li> </ul>	<p><b>PRESTO Digital Solutions</b></p> <ul style="list-style-type: none"> <li>• Support Person IDs</li> <li>• Post-Secondary IDs</li> </ul>
<p><b>Identify and onboard new retail partners, including 20 new retail locations on Line 5 Eglinton</b></p>		
<p><b>Better bus stops:</b> Make 150 stops accessible per year; pilot new technologies; explore opportunities to reimagine the street furniture requirements for bus and streetcar stops with City staff</p>		
<p><b>Real-Time ASL/LSQ Video Assistance Pilot</b></p>	<p>Explore additional pilots that improve the journey for customers with disabilities, such as audio broadcasting for riders with hearing loss</p>	
<p><b>Expand 5G wireless service across the subway network</b> to improve digital access to real-time TTC information and alerts</p>		

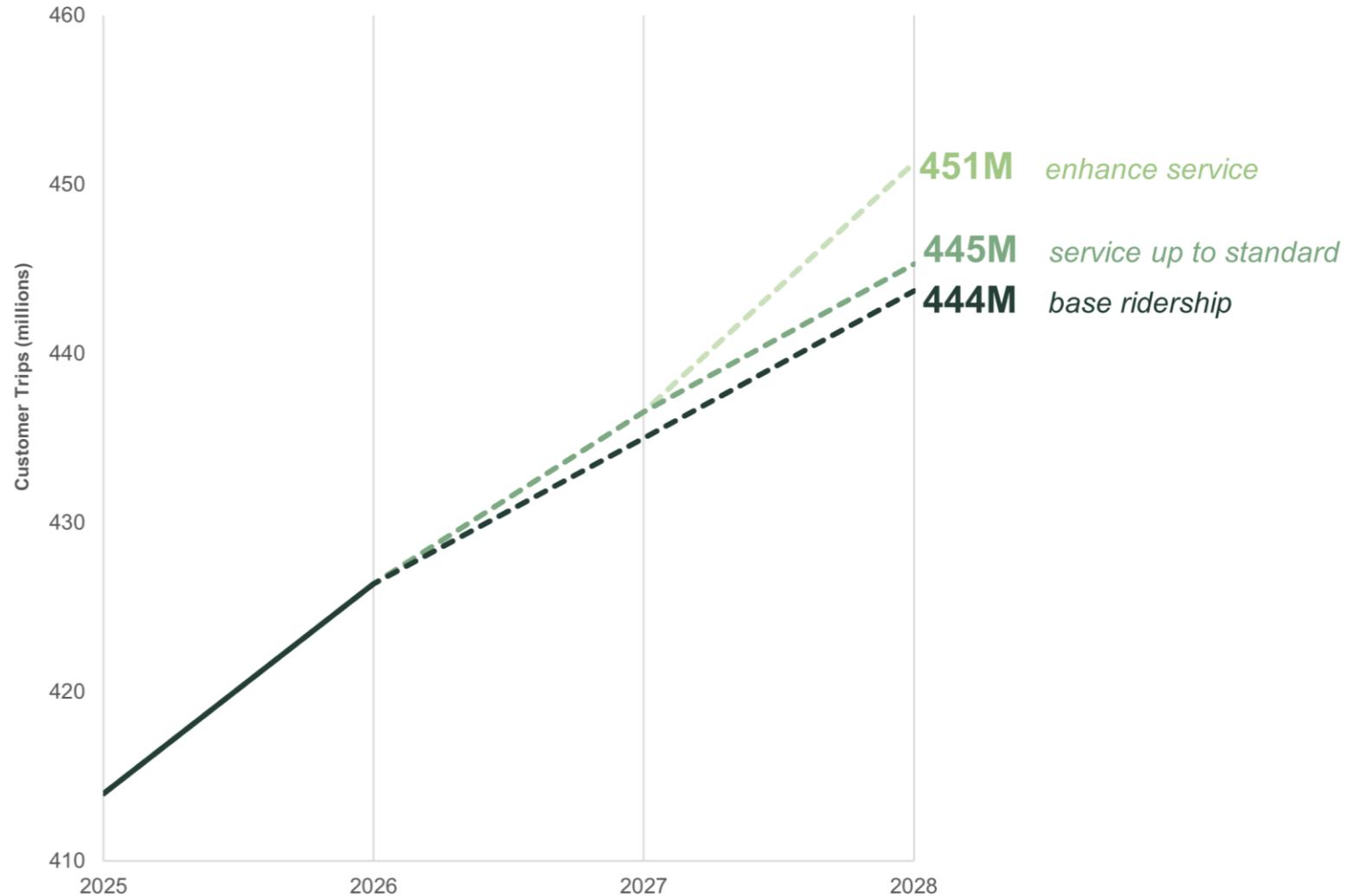


# What matters most and where support is needed



# Benefits summary

- Full implementation of service initiatives in RGS could result in seven million more customer trips annually by 2028



# How we win the trip



## Frequent Rider Farah

Considering leaving transit due to concerns with cost, crowding, reliability, comfort

- Fare freeze and fare capping control Farah's monthly transportation costs
- Bringing service back up to standard reduces crowding and improves comfort on her morning office commutes
- TSP and 6-minute streetcar network make her trips feel reliable and fast

Affordable

Fast



## Occasional Rider Oliver

Prefers ride share's planning and predictability

- Digital stops with accurate arrival times make transit feel more predictable
- Improved real-time information and digital experience reduces Oliver's uncertainty and restores confidence

Seamless



## Non-rider Nancy

Switched to driving due to safety concerns and struggles with wayfinding

- Nancy uses an e-ticket to attend a convention and experiences clearer wayfinding and improved Google Pathways. The TTC feels more intuitive and easier to navigate.
- She notices more visible safety staff and downloads the SafeTTC app after seeing signage in the station. With the trip feeling supported and secure, Nancy decides to take the TTC again

Seamless

Safe



# Investment summary

- Strategy includes initiatives:
  - Implementation ready – costs and resources estimated
  - Exploration required – costs to be developed on annual basis
- Operating and Capital requirements presented capture implementation ready initiatives only
- Resource requirements will increase as exploratory items move through the business case process
- RGS presents a vision with cost estimates to be approved through annual budget process



# | Ridership will not grow by default

- Travel patterns have shifted – customer expectations have not
- Ridership growth requires **deliberate, sustained investment**
- Winning the trip depends on **affordability, speed, safety, and seamlessness**

**Strong transit underpins a strong city, and continued support is essential to deliver it**



