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# LMI OUTLOOK

## THE IMPACT OF COVID-19 ON CANADA'S BUS INDUSTRY



Motor Carrier Passenger Council Of Canada  
Conseil canadien du transport de passagers

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## DASHBOARD

- Public transit considered an essential service must continue to operate despite dramatic decline in ridership and revenue
- Transit ridership dropped from 96-100% in early March to as low as 8% during peak of COVID-19 in April 2020
- Motor Coach businesses have suspended service, laying off workers and are forced to negotiate cash flow management with creditors/investors
- School bus is facing an enormous challenge, from closing schools in March, forcing layoffs and major health and safety concerns surrounding the reopening of schools in September
- Ongoing lobbying for Federal relief for public transit has resulted in inclusion in the safe restart agreement among the federal, provincial, and territorial governments with almost \$4 billion in operating support. This is over and above any transit help that may arrive through a separate envelope in the agreement for municipalities
- Restrictive measures implemented by governments has led to unprecedented workplace changes, safety processes and lay-offs
- Since March, Canada's Bus Industry has laid off over 5,000 workers
- While some of the laid off workers have been recalled across the country, the majority continue their layoff. Nevertheless, the situation remains precarious
- As the Canadian economy re-opens, a full recovery to pre-COVID-19 levels is not expected for some time
- New challenges and priorities have emerged, such as continued staff and customer safety and operational upkeep, compounding previous concerns
- Bus Industry demographics reveal a higher average age than the Canadian average contributing to health and safety concerns expressed by staff regarding return to work. This creates a significant issue for the school bus sector whose drivers are predominately part-time older workers
- Access to quality labour market information is critical to help education providers and job seekers identify changes to existing skills requirements, new service protocols and other work requirements. MCPCC continues to be the go-to source for presenting the most timely and accurate information as the situation evolves daily

## INTRODUCTION

The COVID-19 pandemic and resulting measures to prevent its spread (social distancing, travel restrictions, school and business closures) have led to unprecedented job loss and economic upheaval across Canada. Data from the Labour Force Survey (LFS) confirm that the economic impact of this health crisis affects different sectors in unique ways.

## REALIZED IMPACT

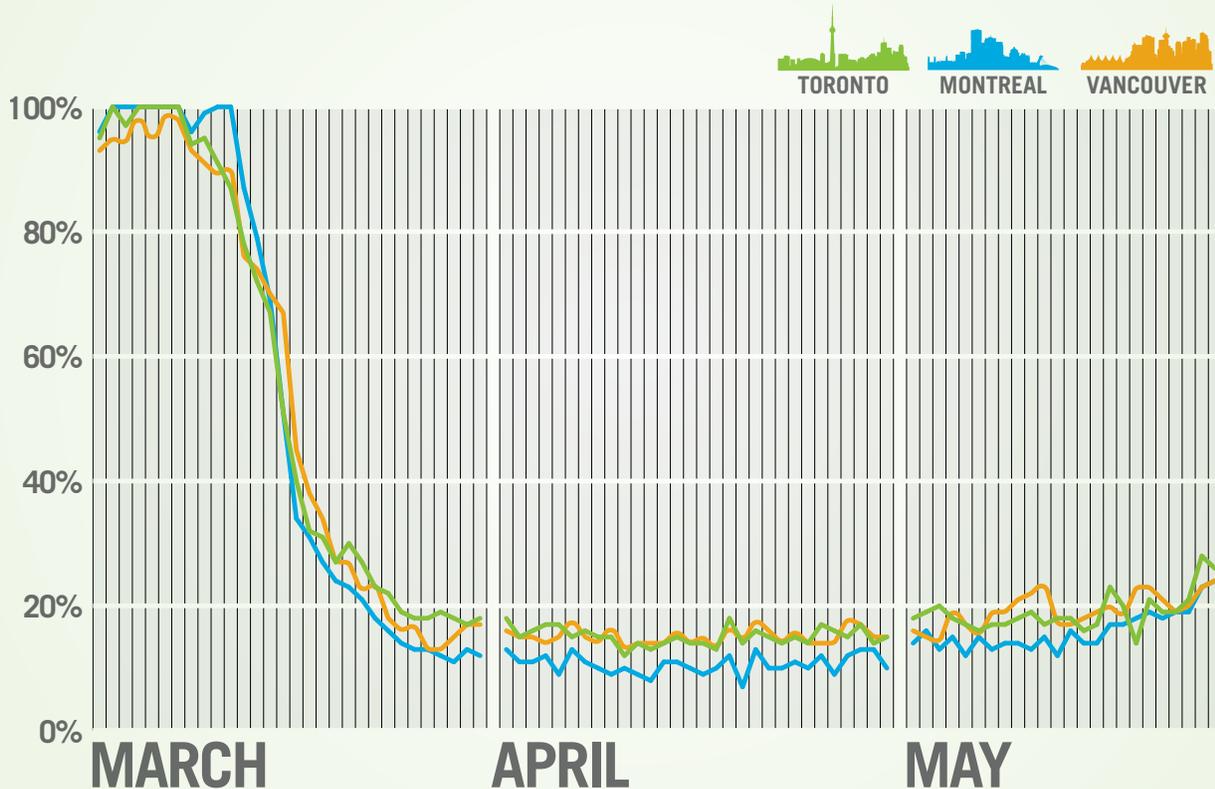
Based on data released by Transit, demand for public transportation in Canada dropped an average of 83 percent in late March compared to previous years. On March 17, the Edmonton Transit Service started using Saturday schedules for all of its routes 7 days a week. On April 1, Calgary Transit also reduced service. In Saskatoon, ridership had dropped by over 80 percent by March 30.

Ridership on the Toronto Area's two largest transit agencies - specifically Toronto Transit Commission (TTC) and GO Transit - had fallen 80 to 90 percent by April 13, and both had reduced

service and/or suspended routes. The TTC and GO Transit have suspended the ability for customers paying their fares with cash (or tokens in the case for TTC services) on their public transit buses until further notice. On April 14, Metro Vancouver's TransLink said they were losing C\$75 million per month, and would need emergency funding or be forced to cut large amounts of local services. In Montreal, the Metro reported an 80 percent drop in ridership by March 26. In the northern suburb of Laval, the STL had cut 45 percent of local bus service.

## URBAN TRANSIT

As ridership plummeted and cleaning costs to protect passengers and employees soared, transit systems continued service, in part to get essential workers to their jobs. Transit ridership and resultant revenue has suffered steep declines during the pandemic as illustrated in the following graph of three major cities.



Source: City mapper Mobility Index International Energy Agency (IEA)

Over the long term, COVID-19 could have a lasting impact on mobility as it drives change in the macroeconomic environment, regulatory trends, technology, and consumer behaviors. Public transit ridership has fallen 70 to 90 percent in major cities across the world, and the operators are burdened with uncertainty and the potential need to implement and control strict hygiene protocols—such as compulsory face masks and health checks for passengers,

and/or restricting the number of riders to comply with space requirements.

As lockdowns ease and economies begin to re-open, authorities must figure out how to deliver cost-effective solutions that meet riders' needs, respond to health concerns and accommodate physical distancing requirements.



An almost empty SkyTrain in Vancouver, Canada

### **MOTOR COACH (INTERCITY, TOUR, CHARTER)**

Several motor coach companies continue to experience large-scale declines in ridership as well as having to temporarily shut down all bus routes and services. The future of many small companies is fragile. As Canada, and other countries reduce spreading the virus by cancelling public events, the Tour & Charter sector is hit very hard. The privately owned companies are looking at ways to limit damage to their businesses. There is a fear that this situation will send weaker companies into bankruptcy. The management of cash flow during the height of this crisis is crucial. This sector of

the industry already weakened by deregulation is doing everything in its power to remain viable. This means reducing expenses to a minimum, negotiating with banks and lenders for reduced payments or temporarily suspending them until the crisis is over and business picks up again and laying off one of their most valuable assets, their experienced drivers. The fear is that drivers who have been laid off, will leave the industry never to come back. The same goes for their garage and office staff.

The owner of Coach Atlantic Group says his company is projecting revenue losses of \$30 million this year because of the COVID-19 pandemic. Mike Cassidy says the crisis is impacting every area of his business. “There wouldn’t be many companies in the Maritimes that would be facing that type of revenue drop,” said Cassidy. “It just so happens there’s no cruise ship, there’s no multi-day tours, and group charters right now are non-existent, and that’s a huge component of our business.” Cassidy says Coach Atlantic’s scheduled interprovincial bus routes have also been hit hard. Schedules have been reduced to three days a week with around 80 passengers a day travelling throughout the system.

With no cruise ships delivering international tourists, no conventions and no concerts this summer, British Columbia’s charter bus operators are struggling to survive during what is normally their moneymaking season. Motor Coach companies surveyed expect it will take at least 20 months to return to pre-

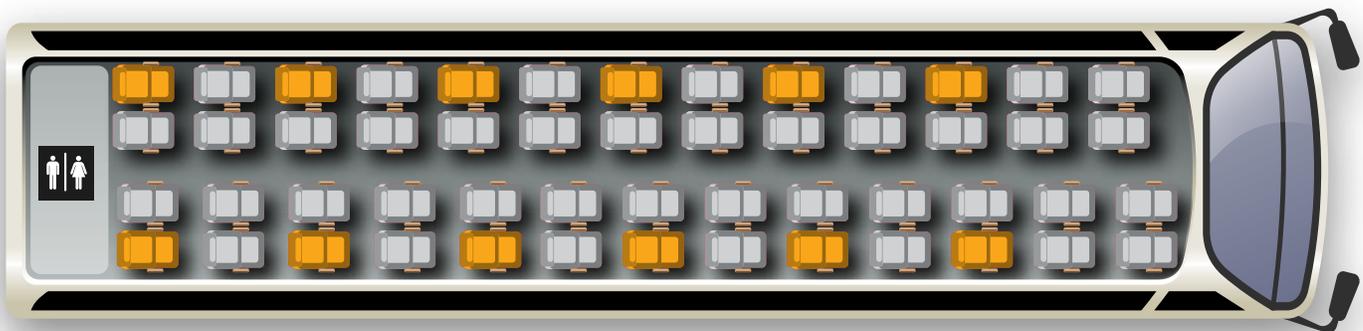
COVID-19 business levels — if they make it that far. John Wilson, president and CEO of Wilson’s Group of Companies comments “Ninety-five per cent of the motor coaches right across North America are parked right now.”

Wilson runs the largest charter bus company on Vancouver Island and the second largest in the province. He shut down most of his transportation operations in mid-March, laying off more than 200 employees. Ninety-five per cent of his fleet of approximately 200 motor coaches remains off the road. “We continue to be down approximately 95 to 97 per cent of revenue month over month,” He expects a limited restart will only generate about 20 per cent of regular revenues, and until tourism returns, the majority of his vehicles will stay parked.

As of the writing of this issue, Greyhound Canada continues the temporary suspension of service.

**MOTOR COACH PHYSICAL DISTANCING MEASURES**

 = Available Seating



**SCHOOL BUS**

The transporting of children is expected to change dramatically with the children subject to physical distancing, and the Operators requiring personal protective equipment, continuous cleaning, disinfection and following public guidelines. The COVID-19 pandemic is having a significant impact on many school bus contractors as they struggle with a swift and nearly complete suspension — or in some cases, loss of business. With schools across the country physically closed until the end of the 2020 School Year, school bus companies have laid off most of their drivers and staff. A great concern is the potential loss of drivers, to quote an Operator, “We need to pay our drivers, to keep them employed, so we don’t lose them.” “There’s always a shortage and difficulty finding qualified drivers.” It is vitally important for this sector of the industry, to be financially supported from the Provincial/Territorial and Federal governments for their operations and drivers, especially if post COVID-19 we wish to ensure service for the upcoming school year(s). This is traditionally a sector which is in continual need of

drivers – with many being laid off, this sector stands to lose the most with personnel going to other parts of the bus industry or leaving the industry altogether.

Many drivers are older, semi-retired or retired people, a group generally more vulnerable to contracting COVID-19, who drive for extra income to make ends meet. Some are skeptical that school boards and the provinces will have a workable plan to keep them safe. This will leave the sector vulnerable if many choose not to return to work for health and safety concerns when school resumes in the Fall. CBC News reached out to two GTA school boards to find out what they’re doing to address drivers’ concerns. The Toronto District School Board (TDSB), the country’s largest, declined to comment, saying it is not yet ready to share its plans. The Peel District School Board also didn’t provide any information, saying it is still “working through the details,” subject to approval by the province.

In light of fears for their children, many parents will opt out of using school bus service when school resumes. New Brunswick reports that 14,000 parents volunteer after the province asks them to take the load off new physically distant busing plan which equates to 10% of the provinces school population. The Education Minister, Dominic Cardy stated “That was the number we needed to be able to keep the fleet in the system going for pretty much as close to normal as we could” in order to make space for physical distancing on buses under a new COVID-19 mitigation plan.

As of the writing of this issue complete provincial plans for return to school remain unclear leaving parents as well as school bus drivers apprehensive about making decisions. Concerns have been expressed as to who is going to monitor the children as they get on the bus whether or not they have a fever or are symptomatic of COVID?

While school districts nationwide are puzzling over how to safely educate children during a pandemic, they have a more immediate challenge, getting millions of bus-riding students there in the first place. The Associated Press noted few challenges are proving to be more daunting than figuring out how to maintain social distance on school buses.

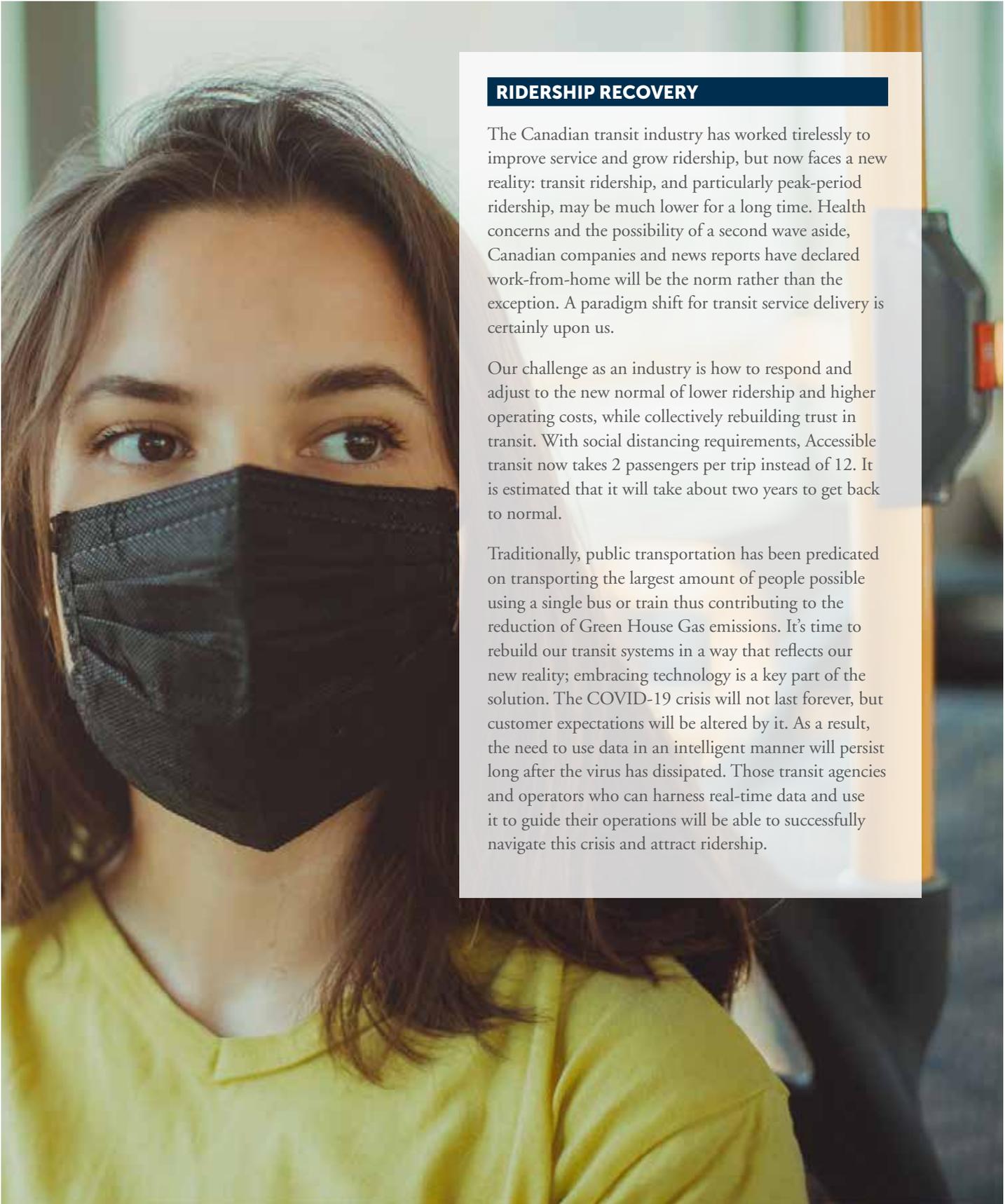
A wide array of strategies has emerged to reduce the health risks but nobody has found a silver bullet.

- Should students who appear to have COVID-19 symptoms be isolated at the front of the school bus to return home?
- Should bus seats be assigned?
- Should buses be loaded from the back?
- Should buses only carry a few students at a time?
- Should school start times be staggered?
- Should there be two sets of bus runs, teaching half the students in the morning and the other half in the afternoon?

Many schools have been surveying parents to determine how many students will take the bus and how many will be privately driven to school. Others are making decisions about bus capacity that involve a trade-off between safety and affordability. A task force report warned that a 2-metre social distancing regulation “is not financially nor operationally feasible,” and that “current thinking” is that a 72-student capacity bus can accommodate 24 students, or more if family members sit together.

Our next issue should be able to unravel these unknowns.





## RIDERSHIP RECOVERY

The Canadian transit industry has worked tirelessly to improve service and grow ridership, but now faces a new reality: transit ridership, and particularly peak-period ridership, may be much lower for a long time. Health concerns and the possibility of a second wave aside, Canadian companies and news reports have declared work-from-home will be the norm rather than the exception. A paradigm shift for transit service delivery is certainly upon us.

Our challenge as an industry is how to respond and adjust to the new normal of lower ridership and higher operating costs, while collectively rebuilding trust in transit. With social distancing requirements, Accessible transit now takes 2 passengers per trip instead of 12. It is estimated that it will take about two years to get back to normal.

Traditionally, public transportation has been predicated on transporting the largest amount of people possible using a single bus or train thus contributing to the reduction of Green House Gas emissions. It's time to rebuild our transit systems in a way that reflects our new reality; embracing technology is a key part of the solution. The COVID-19 crisis will not last forever, but customer expectations will be altered by it. As a result, the need to use data in an intelligent manner will persist long after the virus has dissipated. Those transit agencies and operators who can harness real-time data and use it to guide their operations will be able to successfully navigate this crisis and attract ridership.

**DATA-DRIVEN APPROACHES**

Transit and all bus sectors have an opportunity to redesign networks from the ground up as new travel patterns emerge. Several are reviewing data-driven planning tools and pooled micro transit solutions with technology organizations that will enable transit companies to leverage information on current ridership

declines and the frequency of fixed-route bus lines. Planners will be able to quickly explore whether to maintain pre-crisis routes and itineraries, reduce coverage and complement, or replace service with on-demand micro transit, leaning heavily on data to help them make the right decisions for their customers and businesses.

**INFRASTRUCTURE INVESTMENT**

Over the past several years there has been large investment by the federal and provincial governments to improve infrastructure of public transit. Concerns have been expressed that these projects will certainly be delayed, and potentially cancelled due to the COVID-19 crisis. Yet infrastructure investments can be crucial

for building trust in public transportation. Investments into good quality public transportation infrastructure can make sustainable modes of transportation more attractive and safer, especially in the wake of a crisis.



**KEY FACTS**

**\$180B**

Through the Investing in Canada infrastructure plan, the Government of Canada is investing more than \$180 billion over 12 years in public transit projects, green infrastructure, social infrastructure, trade and transportation routes, and Canada's rural and northern communities.

**\$28.7B**

\$28.7 billion of this funding is supporting public transit projects, including \$5 billion available for investment through the Canada Infrastructure Bank.

**\$7.3B**

Across the province, Ontario is investing more than \$7.3 billion in public transit infrastructure over 10 years through the Investing in Canada Infrastructure Program.

**QUOTES**

In a news release on June 24, 2020 the Province of Ontario confirmed that “Strategic investments in public transit infrastructure play a key role in ensuring Ontarians can get to work, school, and essential services on time and safely back home at the end of the day.”



“ *The projects announced today will provide better accessibility and improved service that will encourage greater use of public transit and allow residents to get to where they need to go safely and affordably. Investing in modern and integrated public transit systems is essential for building the healthier, low carbon communities of tomorrow. Our federal government will continue building stronger, sustainable infrastructure that will serve our community now and well into the future.* ”

The Honourable  
**Maryam Monsef**

Minister for Women and Gender Equality and Rural Economic Development and Member of Parliament for Peterborough-Kawartha



“ *Investing in modern and accessible public transportation systems allows Canadians to get around in faster, cheaper and cleaner ways. The investment in an expanded network of cycling lanes, multi-use paths, and new buses will improve the quality of lives for residents, get cars off the road and help make Kingston’s transit system more sustainable. Canada’s infrastructure plan invests in thousands of projects, creates jobs across the country and builds stronger communities.* ”

The Honourable  
**Catherine McKenna**

Minister of Infrastructure and Communities



The continuity and sustainment of these investments are a real boost in such times of uncertainty. In June, the Federal government, announced that funding delivered through the federal Gas Tax Fund will be accelerated this year. The funding is earmarked for communities to move forward with infrastructure projects to meet their local needs. Many public transit projects across the country will continue to be implemented. Reference our Business and Financial Report for details -

Page 22 [https://buscouncil.ca/downloads/2019-LMI-business-financial-report\\_en.pdf](https://buscouncil.ca/downloads/2019-LMI-business-financial-report_en.pdf)

## CHANGES IN TRANSPORTATION BEHAVIOUR

As evidenced by the drastic drop in ridership, a key question for the Bus Industry is whether changes to consumer behaviours during the crisis may result in a permanent change in behaviour or if transportation patterns will revert to 'business as usual' when the crisis ends. Research has shown that disruptions can be a catalyst for shifts towards more sustainable transportation behaviours but avoiding a return to pre-crisis behaviours requires governments to take decisive actions. The Governments in Canada are doing just that by continued investment in sustainable transportation. But how are consumers going to react?

Ensuring public trust in the safety of our transportation systems will be difficult, as people will likely continue to avoid close physical contact with others. However, maintaining the quality and safety of public transportation services in the post-lockdown period will be crucial to ensure people do not lose faith in public transit in the longer term.

Public transit systems must have the resources to maintain reliability standards while mindful of passengers' perceptions of safety, through measures to maintain a level of social distancing. As mentioned earlier this may involve changing the frequency of services and harnessing real-time data to make the right decisions on routes and itineraries. It may also mean that manufacturers will have an opportunity to offer modified designs to accommodate physical distancing measures.

## PUBLIC TRANSIT SAFETY

During normal times, a functioning transit system requires thousands of people to crowd together in an enclosed space, spend several minutes breathing the same air, and then go out into communities. Combined with economic shutdowns prompted by the pandemic, the fear of contracting the virus on subways and buses has helped decimate ridership on systems, creating revenue crises to transit operators around the world. In April, Abacus Data asked Canadians how they feel about returning to public transit. As you'd expect, about a quarter say they won't return until there's a vaccine. This was corroborated by a University of Toronto study. A very small number are unconcerned, but almost 70% say they will need a combination of mask-wearing, lower passenger levels to allow some degree of distancing—and trust that the transit system is doing the right thing. As of June, bus ridership has increased to about 65% of pre-pandemic levels with about 15% of pre-COVID ridership.

Transit systems responded quickly and ably as the outbreak began to protect passengers and employees, while providing critical mobility services for essential workers. Even at the height of the pandemic, transit served about a million people every day. Thanks to quick and careful responsiveness, public transit was not a significant spreader of COVID-19.

As the economy opens, Canadian Urban Transit Association (CUTA) developed guidelines to help transit systems keep operating safely in the new normal.

## GUIDING PRINCIPLES:

Health and wellbeing of passengers and employees is paramount

Maintaining social distancing aboard public transit is challenging

Cities depend on mass transit, which is an essential service

Transit systems should use these guidelines in conjunction with advice from local public health authorities to develop plans best suited to local conditions

Please refer to the following link for health and safety protocols for facilities and terminals and on board. <https://cutaactu.ca/en/COVID-19>

Concerning safety, the Toronto Star spoke to Toronto Transit Commission (TTC). TTC spokesperson Stuart Green said it was up to Toronto Public Health to determine how safe the transit system is, but the TTC agrees with the health authority's position that "the TTC remains a safe system."



Green said the TTC is "certainly aware of examples from around the world that suggest there are no links between mass transit ridership and viral spread," but "we are not taking that for granted." He said "as the city reopens and ridership returns, we will take all steps possible to continue to protect the health and safety of everyone in our system."

In addition to mandating mask use, the TTC is also cleaning its vehicles several times a day, deploying additional vehicles to busy bus routes to decrease crowding, and is readying crowd management plans for subway stations.

While there remains uncertainty about exactly how risky it is to ride, passengers will continue to have real fear about taking transit while the virus remains a threat, and the TTC will need to address those anxieties to coax customers back.

"We absolutely understand that perception matters for our customers and employees," Green said. "We want them not only to feel safe, but to actually be safe."

Source: Toronto Star Ben Spurr Transportation Reporter Thu., June 18, 2020

The same experience is prevalent across transit systems in Canada. All systems have posted a recovery plan and safety measures, including the wearing of masks, on their respective websites.

*The TTC is certainly aware of examples from around the world that suggest there are no links between mass transit ridership and viral spread, but we are not taking that for granted.*

**Stuart Green**  
Spokesperson - Toronto Transit Commission

### Stay Safe and Healthy on Transit

We are in this together - we can keep each other safe and healthy by following a few simple steps. Wear a mask or face covering, physically distance yourself from others, consider travelling during off-peak times and continue to follow AHS [Alberta Health Services] guidelines. Bus shields and LRT cabs provide excellent protection so Operators do not need to wear masks when in a shielded area. However, Operators and other public facing transit employees will wear masks when going into public areas.

Edmonton Transit



## BUS COMPANIES DIALOGUE

We spoke to a number of large and small companies to get a sense of the current situation and future planning as the economy opens. Our focus surrounded the area of Employment, specifically, layoffs, recall, hiring plans, policy changes.

### LAYOFFS AND RECALLS

A number of transit systems have not laid off employees as yet. Several have been redeployed in other areas such as sanitation. Employees or members of their families who are immunocompromised or have childcare difficulties have taken leaves of absence without pay. Some jurisdictions have been forced to layoff casual workers, service contractors and certain fixed route relief employees. To date of those laid off a small number have been recalled. Our research indicates that over 5000 union and non-union employees across Canada have been laid off and some systems/contractors have expressed concerns of a potential for future lay offs.

As stated earlier the motor coach sector has suspended or significantly reduced services, consequently forced to lay off workers. Greyhound Canada continues temporary suspension of services. Others have been forced to severely reduce services as demand for non-essential tours, charters and cross-country travel is halted. Some tour and charter companies tell us that after laying off all drivers they are gradually bringing them back as needed with anticipation of being up to 30-40% strength by year-end.

The school bus sector traditionally lays off workers over the summer months and looks to recall those workers for the start of the school season in September. The companies we spoke to reiterate that many drivers are older, semi-retired or retired people, a group generally more vulnerable to contracting COVID-19, who drive for extra income to make ends meet. Some are skeptical that school boards and the province will have a workable plan to keep them safe. Concerns surround the areas of being able to physically distance from children, getting the buses sanitized between runs, as drivers often do many trips in the mornings and afternoons to multiple schools. Companies require a firm commitment from drivers if they are returning. Many drivers, especially those with health issues, say it is hard to make a firm commitment if they don't know what the protocols are going to be. Companies are concerned that the longer bus drivers have to wait for a plan, the more unprepared they will be and the greater the risk of losing staff which is a perennial issue for this sector. Companies tell us that several drivers have indicated that they will not return due to health and high-risk issues of an aging workforce.



### HIRING PLANS

Most sectors implement annual hiring plans. For the balance of 2020, urban transit companies tell us that with reassignment of duties and service capacity down, (for example, a system tells us that the normal run was about 4700 trips per day, now just over 1200, roughly ¼ usual business) they will not be going ahead with a hiring campaign. In many jurisdictions' ridership is only up to 25-35%. In addition, many employees who had planned to retire are now delaying that option. Each transit system of course must hire within their own demographics as some will be replacing retirees.

As the motor coach business is precarious, very few companies that are running service will be hiring.

School bus traditionally ramp up a big hiring campaign over the summer. There are many unknowns at this time as many laid off drivers have yet to make a commitment to return. It is expected that the school bus sector will need to hire drivers this Fall. Case in point, many school boards/districts use contractors and some did not pass on funding as with normal practice to contractors; as a result, many are on the brink of bankruptcy and will have difficulty rehiring drivers.

## POLICY CHANGES

As companies prepare to offer service many policy changes are being implemented. For example, plans to install partitions on 50 coach buses that operate throughout Atlantic Canada are underway. “We have a game changer here ... this is what we need in our industry,” said Mike Cassidy, owner of Coach Atlantic Maritime Bus. He said his buses will be among the first in the country to try the new partitions, developed by supplier Prevost and approved by Transport Canada — and he believes they could help a lot with restoring consumer confidence in bus travel. “How do we get our buses rolling again and have people travelling?” said Cassidy. “Number one is customer confidence when it comes to safety and it comes to comfortability.”

The design is similar to plastic shielding that is popping up in retail and grocery stores. The partitions fit to the back of the motor coach seat. Coach buses that normally seat 56 people will see the row behind the driver now unavailable, due to physical distancing, and the remaining 54 seats will all have the partitions. Family members travelling together will be able to sit side-by-side. Those travelling alone will be asked to take the window seat, and leave the seat beside them empty.

Transit Policy changes expected to be enforced for the near future and possibly longer include:

- Installation of shields surrounding the driver cabin
- Mandatory masks for passengers
- Exiting from the back door
- Drivers must wear safety glasses and mask when outside the cabin area
- Security control for passenger compliance
- Enhancement of cleaning and sanitizing
- Accessible drivers must wear mask/gloves when not alone in vehicle and must disinfect areas after each trip
- Trainers are now 1 to 2 students’ ratio instead of 1 to 3 students with in-class instruction reduced to 6 students instead of 12

Most school bus jurisdictions are implementing mandatory masks for Grades 6 – 12; Junior Kindergarten to Grade 5 – if cannot distance must wear mask.



## MOVING FORWARD

The economic shutdown from the COVID-19 pandemic hit Canada's Bus Industry hard. While ridership declines were unprecedented, the sectors are starting to show signs of recovery as restrictions begin to lift.

The COVID-19 crisis has changed people's transportation behaviours in dramatic ways, with large reductions in public transit use and significant growth in cycling uptake. Evidence from previous crises shows that in the immediate aftermath of crisis events, transportation behaviours will change, as people reassess the costs and benefits of different transportation modes. Decision-making will be partly driven by people's perceptions of risks, regardless of whether such perceptions are well founded or not. As lockdowns are lifted, policy will be crucial in determining whether mobility changes triggered by COVID-19 are positive or negative, in terms of safety and long-term environmental and health outcomes. Thankfully, governments designing sustainable transportation policies for the post lockdown period can draw on experiences from previous crises to predict likely behaviours and design policies that are fit for purpose.

## ACCURATE AND TIMELY LMI

As the Industry continues to rebuild services, employers and job seekers will require access to a wide range of local, timely, and accurate LMI, especially information related to understanding the "new normal" of a post-COVID economy.

Looking towards 2021 and beyond, the recurring concern of health and safety on public transportation will affect the rate of industry recovery. Clearly identifying and communicating the job skills, work requirements, and updated health and safety policies of the sectors will be key.

To this end, MCPCC is working to improve the availability of and access to skills and other job requirements information. For example, our LMI topical Reports, our Job Seeker tools and videos highlighting job skills and requirements, updated National Occupational Standards, Accreditation and Certification of professional practices and linking skill requirements to Employment and Social Development Canada Skills and Competency Taxonomy.



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