POLICY BRIEF

APTA Public Transportation Ridership Update

Key Takeaways

1. **National public transit ridership has increased for five straight years**.

2. Transit riders took **8.1 billion trips** on public transportation in 2025; a **6.0 percent increase** compared to 2024.

3. After falling to 20 percent of pre-pandemic levels in April 2020, transit ridership recovered to **81 percent** of pre-pandemic levels in 2025. Ridership recovery is dependent on transit service frequency, reliability, and delivery, together with external factors such as the makeup of local economies.

4. Public transportation ridership levels increased throughout 2025, while office occupancy rates remained stagnant. Office occupancy levels increased in the first three months of 2026, averaging 54 percent, compared to 50 percent in late 2025.

5. Since the Iran conflict began in February 2026, **gas prices have risen** sharply to an average of **$4.10 per gallon** as of late March 2026. Gas price increases may further drive public transit ridership recovery. In March, public transit ridership grew an estimated **12 percent** compared to February.

National Ridership Picture

Return-to-office policies and a strong job market both have positive implications for public transportation ridership recovery. Office occupancy rates increased in the first three months of 2026, averaging around 54 percent of pre-pandemic levels, according to Kastle Systems.[1] Regardless of slow office occupancy recovery, the recovery of public transit ridership has continued. In March 2026, public transit ridership grew by an estimated 12 percent compared to February, according to the APTA Ridership Trends Dashboard powered by Transit. Agencies continue to attract a wide range of commute and non-commute trips. Current data remains limited, but indicators in several metro regions point to public transit recovery being led by trips to and from residential and commercial areas as opposed to office/work centers. More

[1] Kastle data aggregated from several weekly data update emails. www.kastle.com.

time and data are needed to determine if this transit demand shift will remain the driving force for ridership return.

With public transit ridership recovering at a much faster rate than office attendance, other factors must be considered for transit's rebound. Non-office jobs, such as work in restaurants and bars, have rebounded tremendously since March 2020. According to the National Restaurant Association, the restaurant industry was the largest job creator from January 2021 to May 2023.[2] The restaurant industry has seen a net gain of 128,800 jobs since February 2025, with 2026 employment levels now exceeding the February 2020 peak by 42,000 jobs.[3] Many restaurant jobs require late-night hours and are generally lower income than office jobs. Average bus rider demographics generally align with those of restaurant or other late-night employees, indicating a significant reason for bus ridership increases leading overall transit recovery.

Bus ridership recovery has been the consistent leader compared to other transit modes largely due to bus rider demographics. According to APTA's *Who Rides Public Transportation*, 22 percent of bus riders are under the age of 25, twice the percentage of younger rail riders. With bus riders on average earning less than rail riders and often working non-office jobs, they have been a critical driver of ridership recovery for many public transit agencies.[4] Regional differences in modal ridership return have presented themselves. Generally, bus and demand response have led the way followed by heavy/light rail and commuter rail trailing. However, some regions have bucked that trend. For instance, at the Massachusetts Bay Transportation Authority in the Boston area, commuter rail ridership return leads heavy and light rail ridership return.

Ridership tracked closely with job growth generally, and service industry jobs more specifically. The cost of car ownership provides another insight into why people have been choosing public transit. An analysis conducted by APTA shows that riders can save more than $13,200 annually by using public transit instead of driving.[5]

Return-to-Office Trends

Today's economic outlook has changed Americans' perspective toward return-to-office policies. Early 2025 surveys found that more than one-half of U.S. employees would have resigned rather than accept a return-to-office mandate; that share has since fallen to 7 percent.[6] This attitude change is growing due to "hybrid creep", an employer strategy to slowly increase policy changes and incentives for working in the office rather than strict requirements.

Employers believe that in-office policies improve productivity and, as a result, companies are increasing the number of required in-office days. Some employers are tying career advancement to visibility, making physical presence an incentive for promotions. Offices are also establishing in-person perks such as catered lunches, wellness programs, and networking events. A cooling job market and the threat of AI displacement have made employees far less willing to push back, providing employers more room to

[2] Sink, Restaurant Job Growth Continues Nationwide, National Restaurant Association (May 05, 2023).
[3] Total Restaurant Industry Jobs, National Restaurant Association (April 03, 2026).
[4] Clark, Who Rides Public Transportation, American Public Transportation Association (January 2017).
[5] Bonina, Dickens, Transit Savings Grow As Auto Costs and Gas Prices Increase, American Public Transportation Association (September 27, 2023).
[6] Escalera, The Great Compliance: Workers Accept return to office in 2026, Myperfectresume (January 9, 2026).

change policies. Meanwhile, managers are framing in-person presence as essential for mentorship, coaching, and productivity, making the office feel less like a mandate and more like a necessity.[7] Viewed individually, none of these shifts seem dramatic. Together, they form a strategy with a goal of changing the rules of where work happens.

That said, these new policies are not ending hybrid work, it is simply being reshaped as flexibility. With more employees heading back to the office, the effects go beyond where people work. Some public transit systems are seeing record-breaking ridership, which is benefiting local economies. In cities built around tech industries and corporate offices, where remote work is most prevalent, transit ridership took the biggest hit in the wake of the pandemic. Cities with more service and essential workers commuting every day did not experience the same drop in transit ridership. Now, with more people returning to the office, cities built around tech industries and corporate offices are starting to recover. Office workers are spending money again on coffee, lunch, transit, and local businesses. These changes support communities and the greater economy built around everyday office life.

In 2025, riders took 8.1 billion trips, 443 million more trips on public transportation than in 2024, and ridership returned to 83 percent of 2019 levels in December 2025. In 2025, APTA's Ridership Trends Dashboard finds that U.S. public transportation ridership has fluctuated between 72 and 86 percent of 2019 levels, when comparing the same week in each year. Ridership data from the first months of 2026 indicates that both New York City and Washington, DC, have had the largest increase in ridership in the first quarter of 2026. Reports have indicated that congestion pricing in lower Manhattan, implemented in January 2025, is contributing to public transit ridership increases in New York City, while return-to-office policies and improved service are driving ridership increases in Washington.

Gas Prices Increase

Recent increases in gas prices have the potential to significantly impact public transit demand across all cities. Since February 2026, **gas prices have risen sharply to an average of $4.10 per gallon as of late March 2026**, [8] an increase of more than 30 percent since the conflict with Iran broke out. This supply and demand issue is driven by the dramatically reduced oil tanker traffic through the Strait of Hormuz in the Persian Gulf. With less oil moving through the Persian Gulf, global supply has tightened, increasing crude oil and gasoline prices for consumers worldwide. During past periods of high gas prices, especially when prices have risen rapidly, public transit agencies have seen increases in ridership. Though the Iran conflict has caused gas prices to spike rapidly since late February 2026, when compared to previous periods, inflation-adjusted prices are not as high as some previous periods. For instance, in 2022, the early 2010s, and 2008, gas prices rose to the equivalent of $5 per gallon or more when adjusted to today's prices.[9]

Important Trends

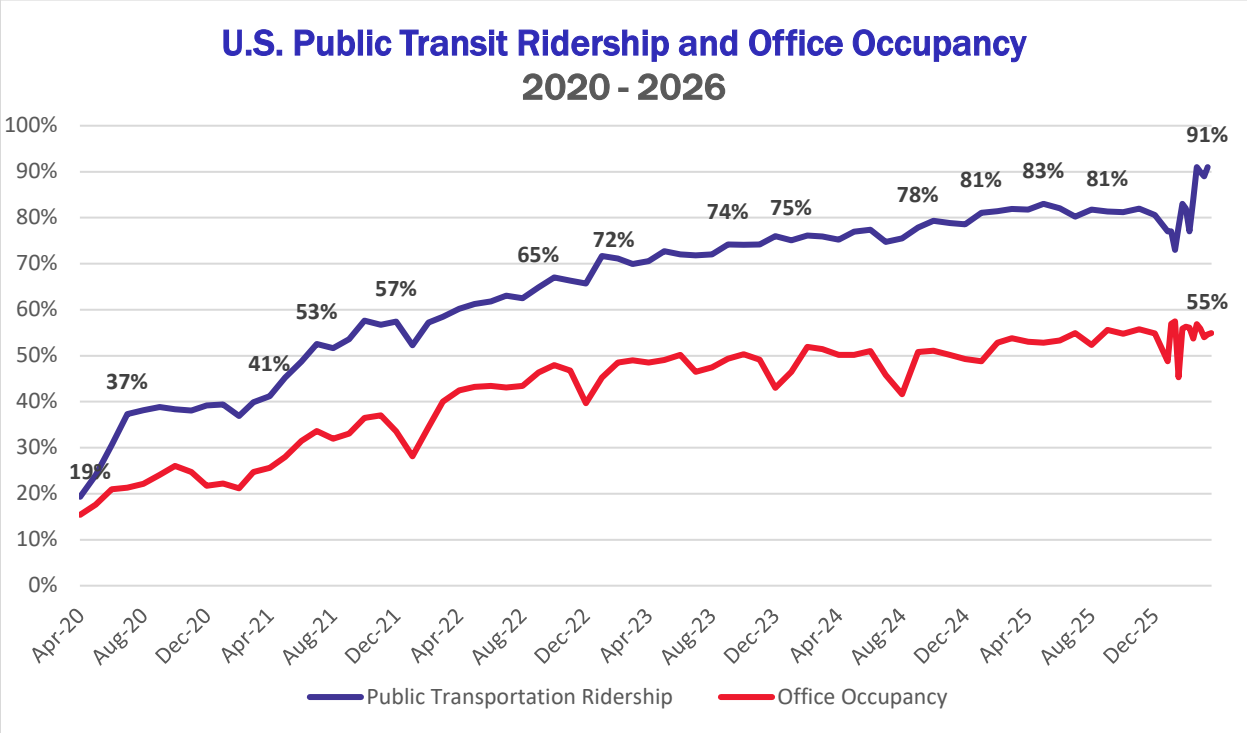
APTA's Quarterly Ridership Report data indicates that ridership recovery has differed based on city size. In general, medium-small areas have recovered ridership to a higher level than larger cities. In general,

[7] Castrillon, 7 Ways 'Hybrid Creep' Is Driving the Return-to-Office Push, Forbes (January 21, 2026).
[8] Weekly U.S. All Grades All Formulations Retail Gasoline Prices (Dollars per Gallon), Energy Information Administration, U.S. Department of Energy.
[9] U.S. Regular All Formulations Gas Price/Consumer Price Index for All Urban Consumers: All Items in U.S. City Average, Federal Reserve Bank of St. Louis.

smaller cities tend to serve relatively fewer riders with alternatives such as teleworking. Office return data also suggests that proportionally more workers in smaller cities are working in offices than in larger cities. The data from medium-sized urban areas suggest that those areas have had difficulty attracting office workers and workers with more travel options back to transit. Data from APTA's Quarterly Ridership Report indicates that, in Q4 2025, the smallest areas (population under 100,000) had recovered to 79 percent of 2019 ridership levels. Medium-small areas (population 100,000 to 500,000) recovered to 83 percent of 2019 transit ridership levels. The largest areas (population more than 2 million) and medium-sized areas (population 500,000 to 2 million) both recovered to 81 percent of 2019 levels, respectively.

National public transit ridership has seen regular increases around September and October of each year. While corroborating data is difficult to find, it is possible that these increases are due to individuals changing schedules and routines around this time of year. The end of summer and the start of the school year may present an opportunity for families to reconsider how they get around, or how many days they choose to work in the office. New students start at colleges and universities across the country in the fall, often representing a large change in routine for those students. These changes in routine have the potential to encourage more public transit use and, in turn, increase ridership.

This chart illustrates the trends of public transit ridership and U.S. office occupancy.[10] Ridership data is from APTA's 2020 - 2025 Quarterly Ridership Reports and APTA's Ridership Trends Dashboard, while office occupancy data is courtesy of Kastle Systems.



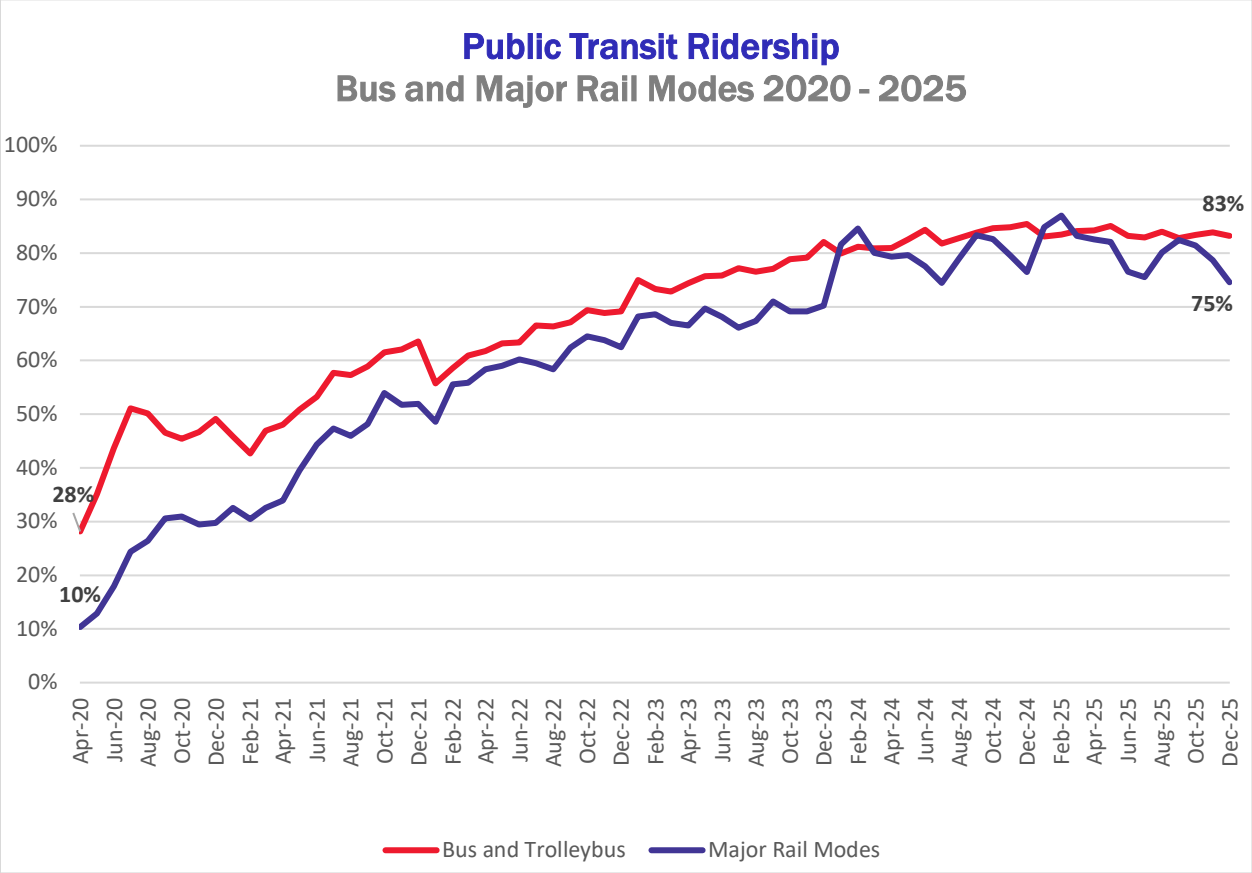
[10] APTA Quarterly Ridership Reports, April 2020 – December 2025, American Public Transportation Association; APTA Ridership Trends Dashboard January 2026 – March 2026, American Public Transportation Association; Kastle Back to Work Barometer, Kastle Systems.

Modal Differences

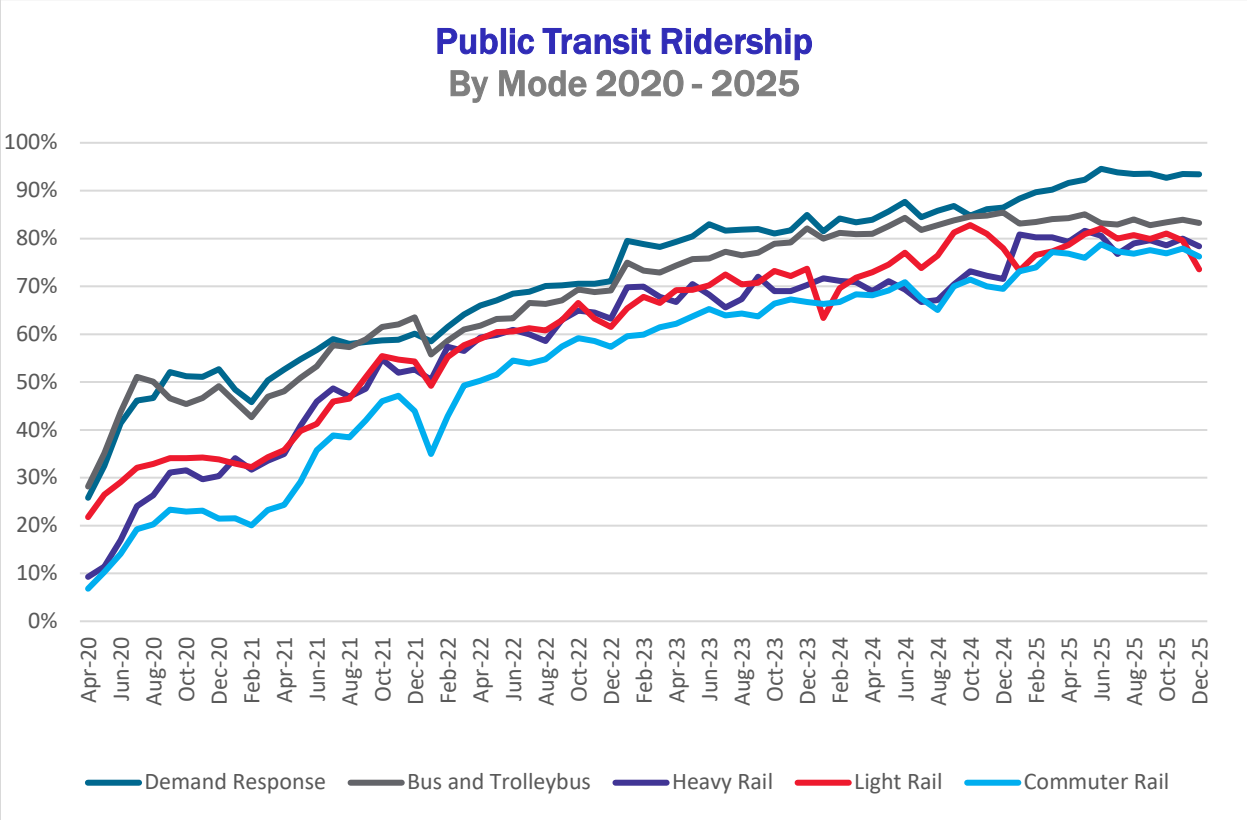
Public transit modes saw significant decreases in ridership because of the COVID-19 pandemic: bus services retained 28 percent of riders and rail services (i.e., heavy rail, light rail, streetcar, commuter rail, and hybrid rail) maintained 10 percent. A key reason for this gap is because bus systems serve more essential workers, while rail modes serve more office commuters. During and since the pandemic, rail riders have been more likely to have options to work from home, but the good news is that rail ridership is bouncing back.

As people have settled into their hybrid work routines, commuters have returned to offices, supporting bus and rail ridership. In 2022, bus ridership reached 69 percent of pre-pandemic levels and rail ridership equaled 62 percent. **Public transit ridership continues to grow. In 2025, bus ridership reached 83 percent of pre-pandemic levels and rail ridership achieved 75 percent.**

This chart illustrates the trends of bus and rail ridership since the COVID-19 pandemic. Rail ridership tends to decrease during the summer and around the holidays. During those periods, office commuters are more likely to be taking time off work or working remotely. These dips are a good example of how transit patterns reflect people's routines.



Considering individual modes, ridership recovery is encouraging. The chart below illustrates the trends of ridership recovery for all major modes. Demand response has lead recovery reaching 93 percent of pre-pandemic levels in December 2025. Bus ridership is strong as well at 83 percent in the same period. Rail modes have made significant strides. Heavy rail, light rail, and commuter rail have recovered to 78 percent, 74 percent, and 76 percent of 2019 ridership levels, respectively.



Comparison to Travel on Roads and Streets

Travel on other modes, like vehicle travel on roads and streets, has only recently eclipsed pre-pandemic levels. According to the Federal Highway Administration's Traffic Volume Trends report,[11] travel on U.S. roads and streets exceeded 2019 levels by one percent in 2024 and two percent in 2025.

What Leads to Ridership Success

APTA's *On the Horizon: Planning* for Post-Pandemic Travel report collected best practices on transit ridership successes. Agencies that were successful in retaining ridership made sure to consistently communicate with the public, keeping them abreast of changes to public transit service; conduct reinforcing social media campaigns; and monitor customer feedback. They thought proactively about service, focusing on essential workers and key customer groups. These agencies also emphasized rider and employee safety. Sanitation measures implemented by many transit agencies with more routine cleaning protected riders and provided greater feelings of safety. They worked to develop effective

[11] Traffic Volume Trends, Federal Highway Administration, U.S. Department of Transportation.

cleaning protocols for vehicles and stations and worked with labor representatives to develop protocols to keep employees safe and healthy.

Rebuilding post-COVID provides a unique opportunity for reinvestment and agencies stand to increase ridership and achieve other goals. Investing in transit operations to better support hourly, late-night, and early-morning workers who rely on public transit would further service goals by providing transit choices for at-risk residents. With these investments, public transit agencies can regain lost ridership and support the larger community.

Real estate investment in central-city areas, in partnership with transit agencies, will potentially further support increased ridership. Development of affordable and market-priced housing in proximity to transit routes will serve to benefit all community residents, including transit riders. Community outreach programs for transit agencies are vital: transit agencies need feedback to know how to best serve their customers and communities. With improved community engagement, strategic identification of residents' needs can be achieved more efficiently.

How Can Public Transit Agencies Adapt to the Future

Key changes in operations and planning can help public transit agencies adapt to the future. APTA's *On the Horizon* report organizes these key changes into four overarching themes:

- Institutionalize Best Practices from the COVID-19 Period;
- Plan and Operate More Effectively;
- Leverage Opportunities to Expand Ridership; and
- Keep Abreast of Changing Trends.

For more information, please see APTA's report, On the Horizon: Planning for Post-Pandemic Travel.

About the APTA Ridership Trends Dashboard with Transit app

Estimated ridership values in the APTA Ridership Trends Dashboard are modeled based on measures of Transit app usage to provide a current measure of demand for public transit. Estimated ridership values for each week are extrapolated values from the most recent quarterly actual ridership figures reported by transit agencies. These estimates represent the percent difference between actual pre-pandemic ridership and estimated ridership for a given period during the pandemic, and do not represent actual reported ridership counts from agencies.

Transit app usage is attributed to a particular transit agency if that agency's service appears as a nearby option for the user when they open the app, or if a user taps on a line operated by a particular transit agency. Surveys of Transit app users since the onset of the pandemic have shown that the app's user demographics generally match those of public transit riders overall, both compared to other common survey methods and available U.S. Census data.

The American Public Transportation Association (APTA)

The American Public Transportation Association is a nonprofit international association of more than 1,700 public- and private-sector organizations that represents a $102 billion industry that directly employs more than 450,000 people and supports millions of private-sector jobs. APTA is the only association in North America that represents all modes of public transportation. APTA members serve the public interest by providing safe, efficient, and economical transit services and products.

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APTA Vision Statement

APTA leads public transportation in a new mobility era,
advocating to connect and build thriving communities