



APTA Public Transportation Ridership Update

Key Takeaways

1. Persistent telework policies resulting from the COVID-19 pandemic emergency have continued to negatively impact ridership on public transportation in the United States beginning in March 2020.
2. After falling to 20 percent of pre-pandemic levels in April 2020, ridership has recovered to more than **77 percent** of pre-pandemic levels.
3. Success in ridership recovery has been dependent on transit service delivery and reliability and external factors, such as the makeup of local economies.
4. As clearly illustrated during the pandemic, public transportation provides mobility to essential workers, which has sustained transit ridership over the past three years.

National Ridership Picture

Return-to-office policies and a strong job market both have positive implications for public transportation ridership recovery. However, office occupancy rates remain around 50 percent, after recovery from a slight dip in August 2023. Regardless of slow office occupancy recovery, ridership return has continued to recover indicating public transit success in attracting a variety of non-commute trips.¹ Current data remains limited, but indicators in several metro regions point to transit recovery being led by trips to and from residential and commercial areas as opposed to office/work centers. More time and data are needed to determine if this transit demand shift will remain the driving force for ridership return. Bus ridership recovery has been the consistent leader compared to other transit modes largely due to bus rider population groups. 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.²

With 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

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

² [APTA, *Who Rides Public Transportation*](#).

industry was the largest job creator from January 2021 to May 2023³. 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.

The structure and makeup of local economies impact the degree of ridership decline. Technology-focused economies with an existing and prominent work-from-home culture have noticed a steeper decline in ridership than those with more service industry jobs and essential workers who power the supply chain. Systems in college towns were also severely affected, as many universities closed and sent students home. Regions of the country that were hardest hit early in the pandemic (e.g., the Northeast, Seattle, and San Francisco Bay areas) had, in general, larger ridership drops than other areas of the country that saw the worst pandemic impacts later in 2020.

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 Light Rail's return.

Ridership tracked closely with job growth generally, and service industry jobs more specifically, cost of car ownership provides another insight into why people have been choosing public transit. A recent analysis conducted by APTA shows that riders can save more than \$13,000 annually by using public transit instead of driving.⁴

After a rapid decline in March and April 2020 to 19 percent of pre-pandemic levels, public transit ridership recovered quickly to approximately 37 percent of pre-pandemic ridership as of July 2020. National transit ridership remained at that approximate level until early 2021, rising to 42 percent of pre-pandemic levels by April 2021.

In April and May 2021, COVID-19 vaccines became widely available. The availability of vaccines resulted in another sustained increase in ridership, with national ridership rising from 42 percent in April to 53 percent in July 2021. During this time, data indicated that more people were returning to offices and starting to increase other types of outside-the-home activities.

Another surge in ridership growth occurred in September and October 2021. Many transit systems that served universities reported significant gains in fall and winter 2021 as students returned to campus. More employees returned to their offices during this time, though the uptake was tempered by the surge in COVID-19 cases due to the Delta variant.

Ridership remained steady through December 2021, when it stood at 58 percent of pre-pandemic ridership. In December, the COVID-19 surge due to the Omicron variant led to reduced travel, and it also had significant impacts on public transportation workforces and services. Many transit agencies reported difficulty with service reliability because of the number of operators, mechanics, and other transit workers

³ <https://restaurant.org/research-and-media/media/press-releases/restaurant-job-growth-continues-nationwide/>.

⁴ <https://www.apta.com/research-technical-resources/research-reports/transit-savings-report/>

required to stay at home because of COVID. Ridership dropped to 49 percent of pre-pandemic levels in early January 2022.

As the Omicron wave subsided, public transportation ridership began to rise again. From mid-February to April 2022, national public transit ridership was approximately 60 percent of pre-pandemic levels.

From late spring to fall 2022, ridership recovery continued. In May, national ridership was at 60 percent of 2019 levels; this grew to 66 percent of 2019 levels by September 2022. Ridership levels also increased during the fourth quarter of 2022. As of January 2023, national ridership stood at 72 percent of 2019 levels. National ridership remained at close to that level through the summer of 2023.

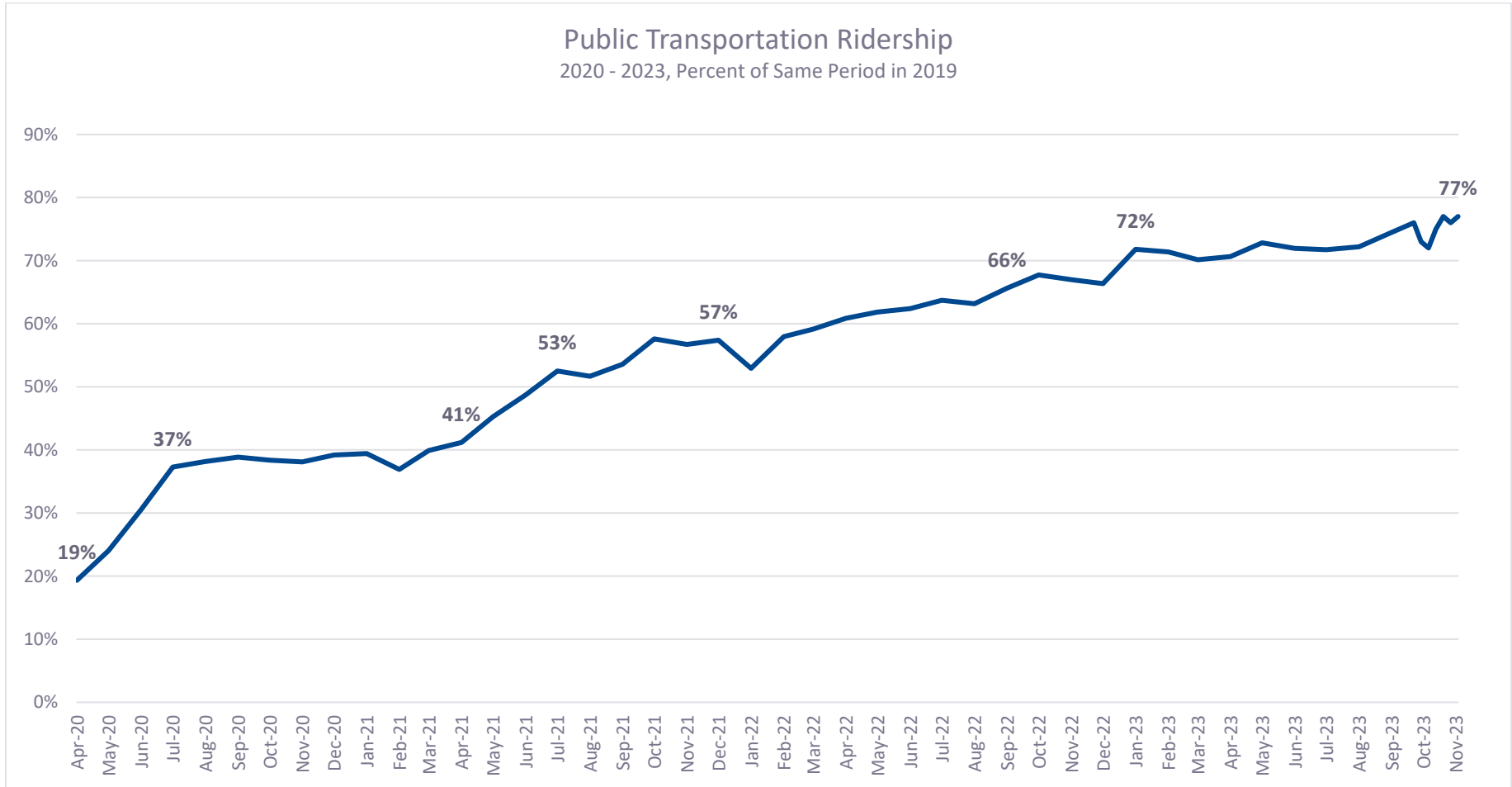
In the fall of 2023, public transit ridership began to increase again. In September 2023, ridership rose to 74 percent of 2019 levels. In October and November 2023, APTA's Ridership Trends Dashboard finds that U.S. public transportation ridership has fluctuated between 75 and 77 percent of 2019 levels, when comparing the same week in each year.

Important Trends

Ridership data indicates that ridership recovery has differed based on city size. The smallest cities and rural areas (population under 100,000) have recovered bus ridership to a higher level than larger cities. The largest urban areas (population over 2 million) and smaller cities (population 100,000 to 500,000) have recovered ridership to approximately the same level when compared to 2019. Medium-sized urban areas (population 500,000 to 2 million) have recovered less ridership compared to 2019. In general, 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 particular difficulty attracting office workers and those with more options back to transit. Data from APTA's Quarterly Ridership Report indicates that, in September 2023, the smallest cities and rural areas had recovered to 86 percent of 2019 transit ridership levels. The largest urban areas and smaller cities recovered to 80 and 79 percent of 2019 levels, respectively, while medium-sized urban areas recovered to 71 percent of 2019 transit ridership levels.

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 this is 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.

The following chart details ridership from April 2020 to November 2023, based on APTA's 2020 - 2023 Quarterly Ridership Reports and APTA's Ridership Trends Dashboard.



Source: APTA Quarterly Ridership Reports, April 2020 – September 2023; [APTA Ridership Trends Dashboard](#) September 2023 – November 2023.

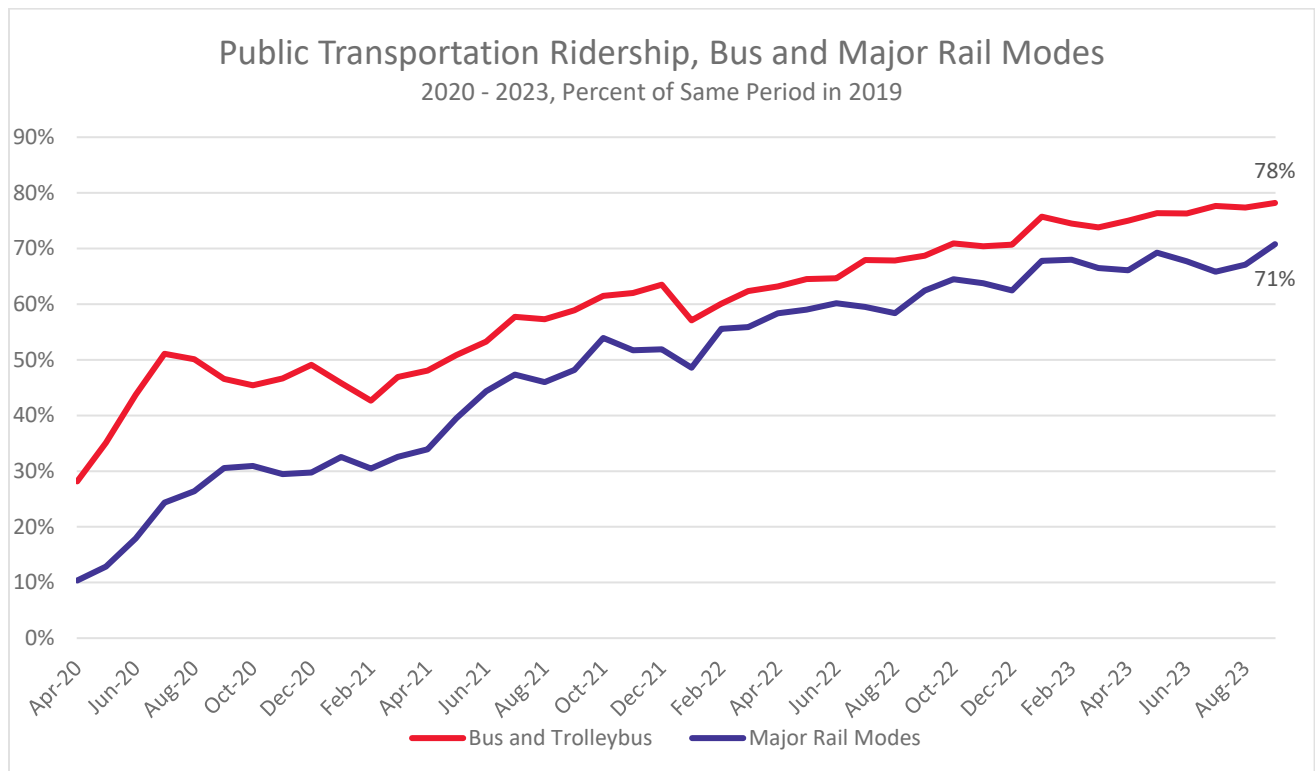
Modal Differences

Although all public transit modes saw significant decreases in ridership because of the COVID-19 pandemic, rail modes (i.e., heavy rail, light rail, streetcar, commuter rail, and hybrid rail) had comparatively larger decreases compared to bus modes. During the early part of the pandemic, rail ridership decreased to 10 percent of pre-pandemic levels in April 2020, while bus ridership decreased to 28 percent of pre-pandemic levels.

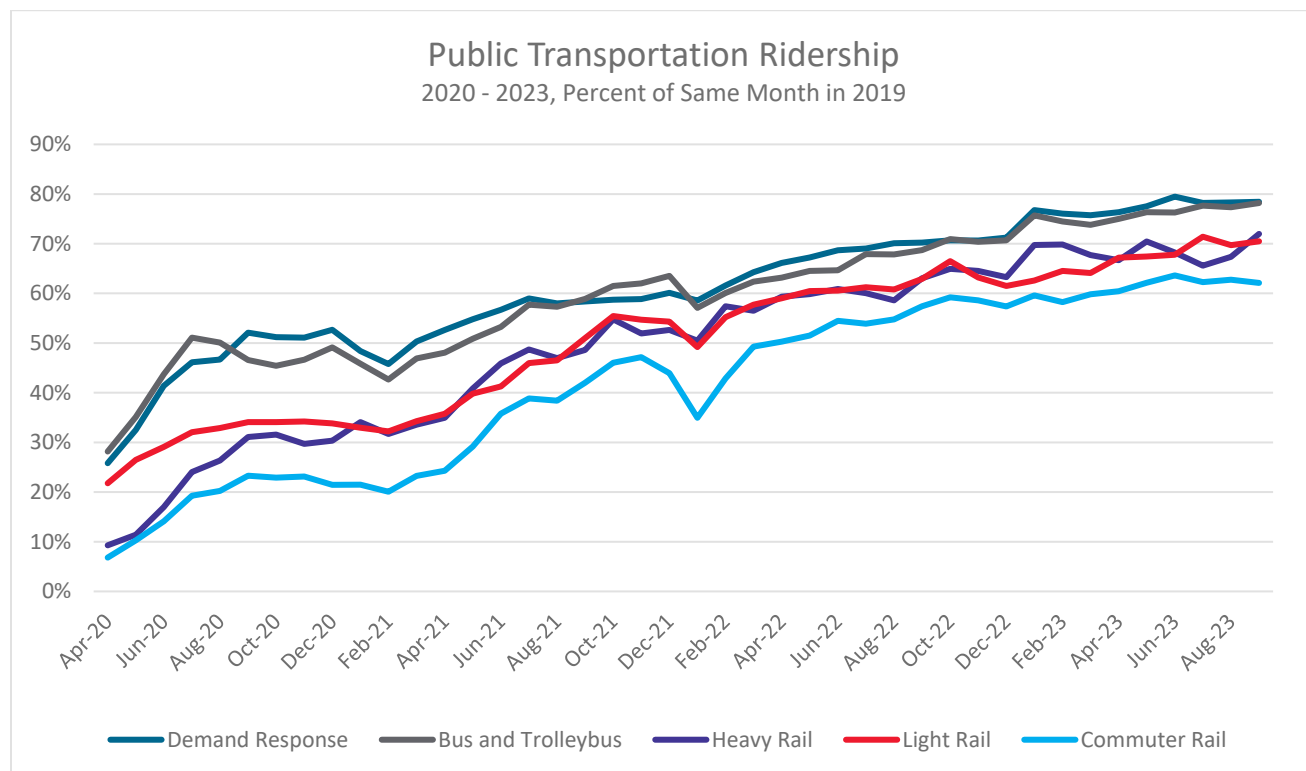
In general, bus modes have been able to retain more riders than rail modes because they generally serve more essential workers, while rail modes serve more office commuters. During the pandemic, rail riders have been more likely to have options to work from home.

Bus ridership has seen a relatively steady increase since February 2021. On the other hand, rail ridership more clearly shows the impact of vaccinations and other factors described in the previous section. Rail ridership shows a sustained increase from April to June 2021, and another increase in September and October 2021, coinciding with the wide availability of COVID-19 vaccines, and the post-summer return to offices and school, respectively. All modes show the impact of the Omicron wave in January 2022, although rail ridership recovered more quickly from the Omicron wave than bus ridership.

Throughout 2022, both bus and rail modes saw a steady increase in ridership relative to 2019, adding almost 13 percent across all modes. Bus ridership was at 70 percent of 2019 levels in December 2022, and rail ridership recovered to 63 percent of 2019 levels. In the first nine months of 2023, bus and rail ridership each grew by another eight percentage points relative to 2019. As of September 2023, bus ridership had risen to 78 percent of 2019 levels, and rail ridership to 71 percent.



Considering the individual modes, Demand Response has recovered the most ridership, reaching 78 percent of pre-pandemic levels in September 2023. Bus ridership is also at 78 percent of pre-pandemic levels, but slightly less than Demand Response. Heavy and Light Rail are at 72 and 70 percent of 2019 ridership levels, respectively, and Commuter Rail is currently at 62 percent of pre-pandemic levels as of September.



Commuter rail historically has seen increased ridership with high gas prices, but the spring and summer gas price increases did not drive an increase in ridership. Of note, regions with the highest gas prices are also the ones with the most extensive commuter rail systems impacting regional ridership return.

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 social equity, communities of color, and low-income families. 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 cleaning protocols for vehicles and stations and worked with labor representatives to develop protocols to keep employees safe and healthy.

Agencies stand to increase ridership and achieve other goals by focusing efforts on historically marginalized communities. Rebuilding post-COVID provides a unique opportunity for reinvestment in

equitable transit. Investing in transit operations to better support hourly, late-night, and early-morning workers who rely on public transit would further equity goals by providing transit choices for at-risk residents. With investments in communities of low income and otherwise vulnerable people, 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 to securing an equitable future: 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 in Prioritizing Social Equity;
- 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.

Sources

APTA Ridership Report: <https://www.apta.com/research-technical-resources/transit-statistics/ridership-report/>

APTA Ridership Trends Dashboard: <https://transitapp.com/apta>

On the Horizon: Planning for Post-Pandemic Travel: <https://www.apta.com/research-technical-resources/research-reports/on-the-horizon-planning-for-post-pandemic-travel/>

The American Public Transportation Association (APTA)

The American Public Transportation Association is a nonprofit international association of 1,500 public- and private-sector organizations that represents a \$79 billion industry that directly employs 430,000 people and supports millions of private-sector jobs. APTA members are engaged in the areas of bus, paratransit, light rail, commuter rail, subways, waterborne services, and intercity and high-speed passenger rail. This includes transit systems; planning, design, construction, and finance firms; product and service providers; academic institutions; transit associations and state departments of transportation. 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.

Authors

Jared Bonina
Policy Analyst
Policy Development and Research
202.496.4854 | jbonina@apta.com

Matthew Dickens
Senior Director,
Policy Development and Research
202.496.4817 | mdickens@apta.com

For General Information

Ward McCarragher, Vice President
Government Affairs and Advocacy
202.496.4828 | wmccarragher@apta.com

APTA Vision Statement

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