

To: Operations & Scheduling Committee

Date: 7/29/2020

From: Melody Reeb, Manager of Planning

Reviewed by: *Ref*

SUBJECT: COVID-19 Fixed-Route Ridership Trends

Background:

In mid-March, a shelter-in-place order took effect in Contra Costa County, along with other Bay Area counties and eventually the entire State of California, in response to COVID-19. The closure of all businesses and activities deemed non-essential had an immediate impact on transit ridership. Average daily ridership dropped as low as 85% below normal levels through most of April. As the County started reopening in mid-May, ridership has very slowly begun to recover.

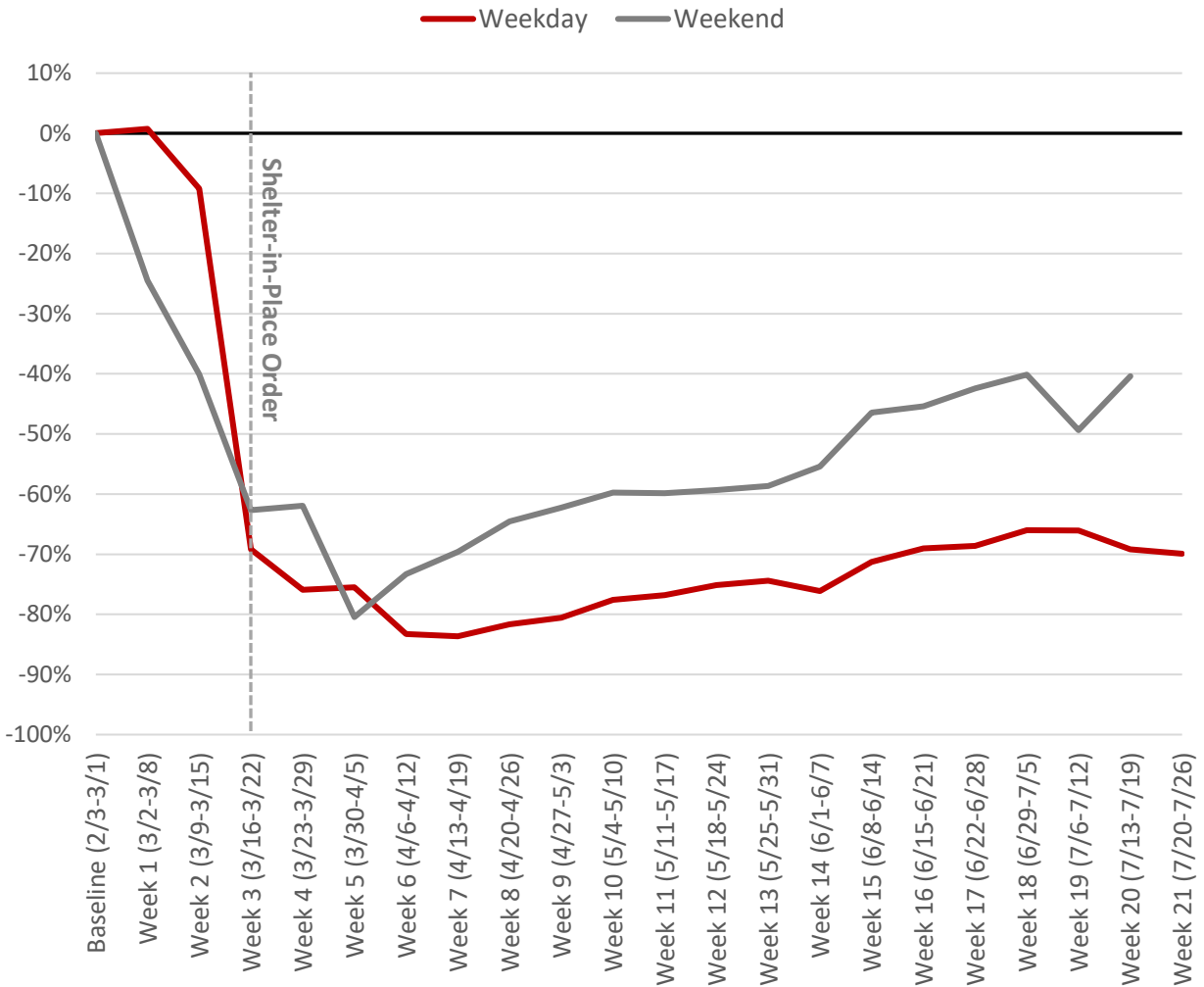
Systemwide Trends:

The chart on the next page shows the weekly change in systemwide ridership since March 2nd using the prior 4 weeks as a baseline. Weekday ridership had been slowly climbing back up since April. At the end of June, ridership was down about 65% compared to normal levels, or around 4,000 daily passengers.

However, due to the recent rise in COVID-19 cases in the state and county, some businesses that had reopened in June were closed again in mid-July. As a result, weekday ridership has dipped back slightly over the past couple weeks and is now down closer to 70%.

Weekend ridership has been growing at a faster pace since the beginning of April and is currently down about 40% compared to normal levels, or around 1,400 passengers per day.

COVID-19 Ridership Trends



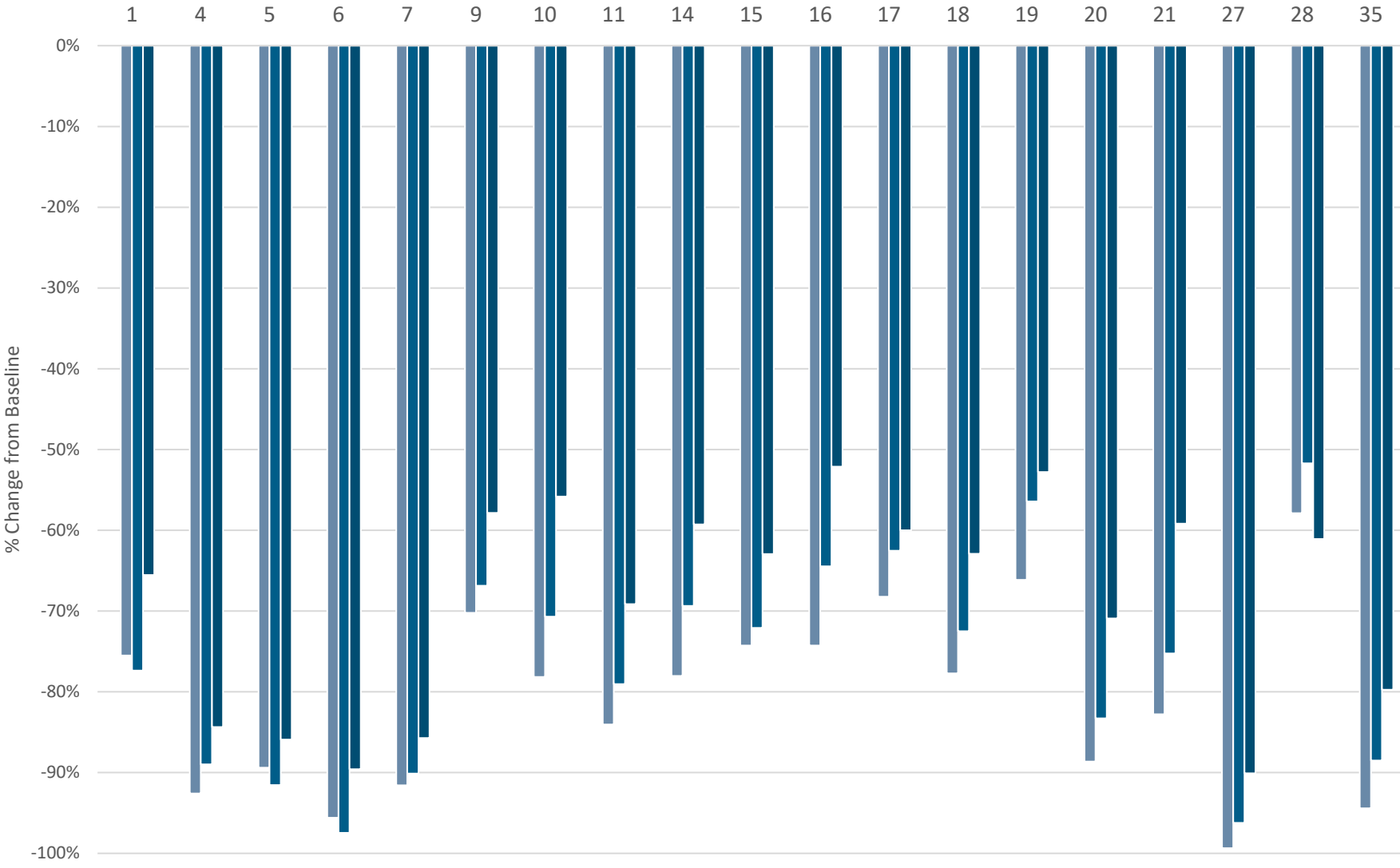
Route-Level Trends:

The following three charts show monthly ridership trends by route compared to the same baseline period identified previously. Among the weekday routes, Routes 10, 14, and 16 have had the most significant recovery in ridership over the past couple months. These routes travel through more transit-dependent areas, including the Monument Corridor, downtown Concord, along Clayton Rd, and Martinez.

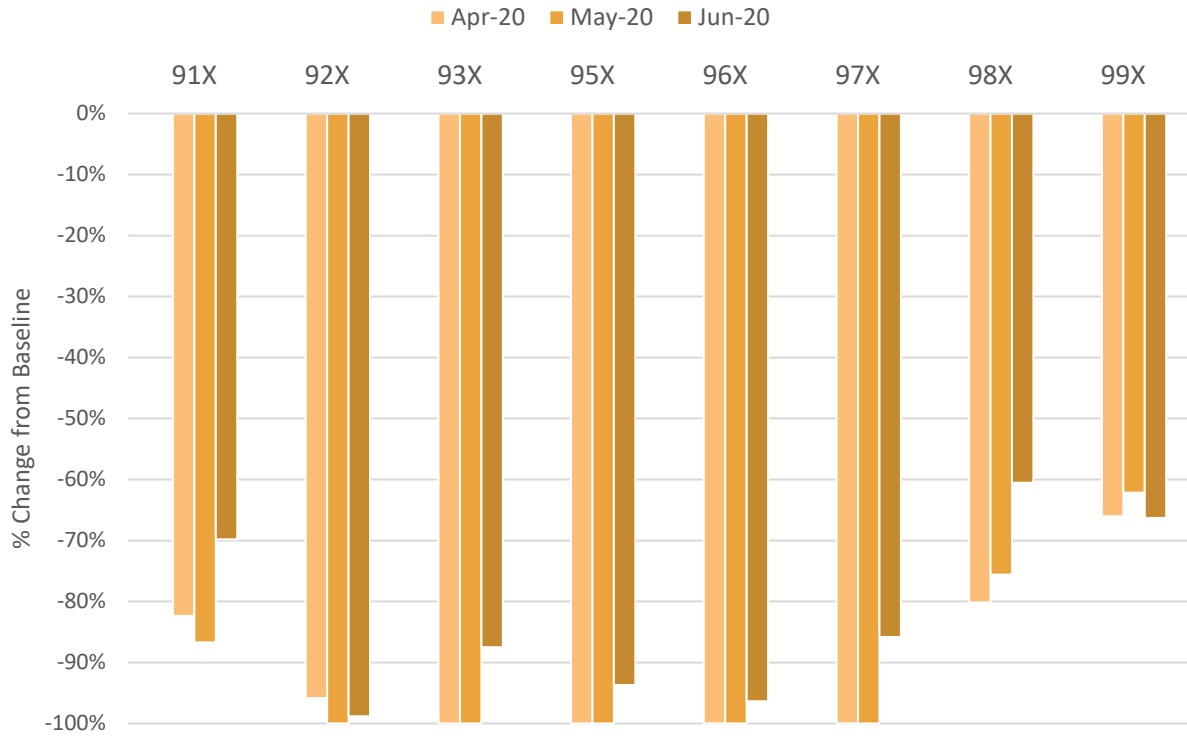
The weekday routes that have experienced the most significant drops in ridership and slowest recovery tend to be more commute-oriented services. These include local Routes 4, 5, 6, and 7, as well as most of the express routes. It should be noted that express service to Bishop Ranch was temporarily discontinued in April, and then limited service was restored on these routes starting in June.

Monthly Ridership Trends - Local Routes

■ Apr-20 ■ May-20 ■ Jun-20



Monthly Ridership Trends - Express Routes



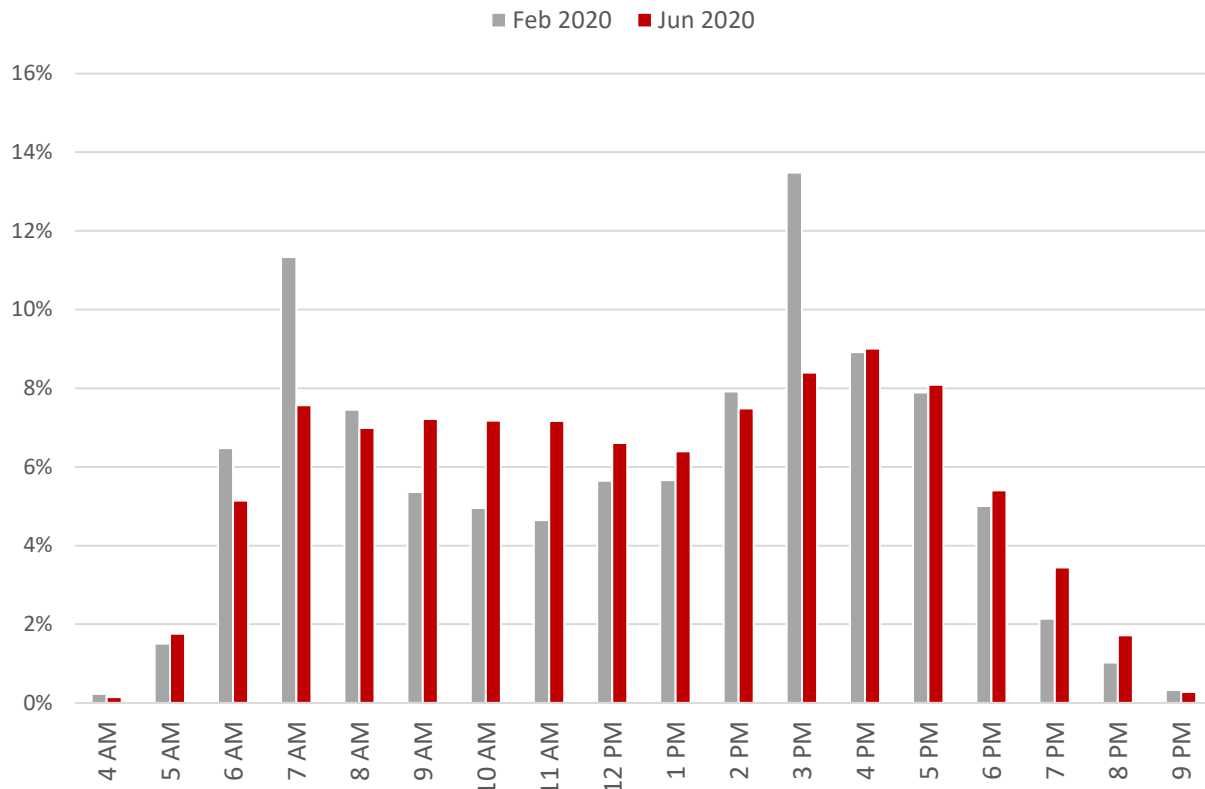
Monthly Ridership Trends - Weekend Routes



As noted previously, weekend ridership has been growing at a faster rate. Similar to the weekday route-level trends, the weekend routes that have had the least significant drops and quickest recoveries in ridership, such as Routes 310 and 314, operate in transit-dependent areas.

These trends indicate a shift in ridership away from the traditional 9-to-5 commute travel patterns, and towards more nonconventional work schedules, which tend to be characteristic of essential workers. Trips to access essential services, such as medical care and groceries, are also likely a significant component of current ridership, and these types of trips tend to be made during what are traditionally off-peak hours, such as midday and weekends. The chart below shows the distribution of weekday ridership by time of day in June compared to February. Whereas ridership used to peak around 7 AM and 3 PM, it now remains much more consistent throughout the day.

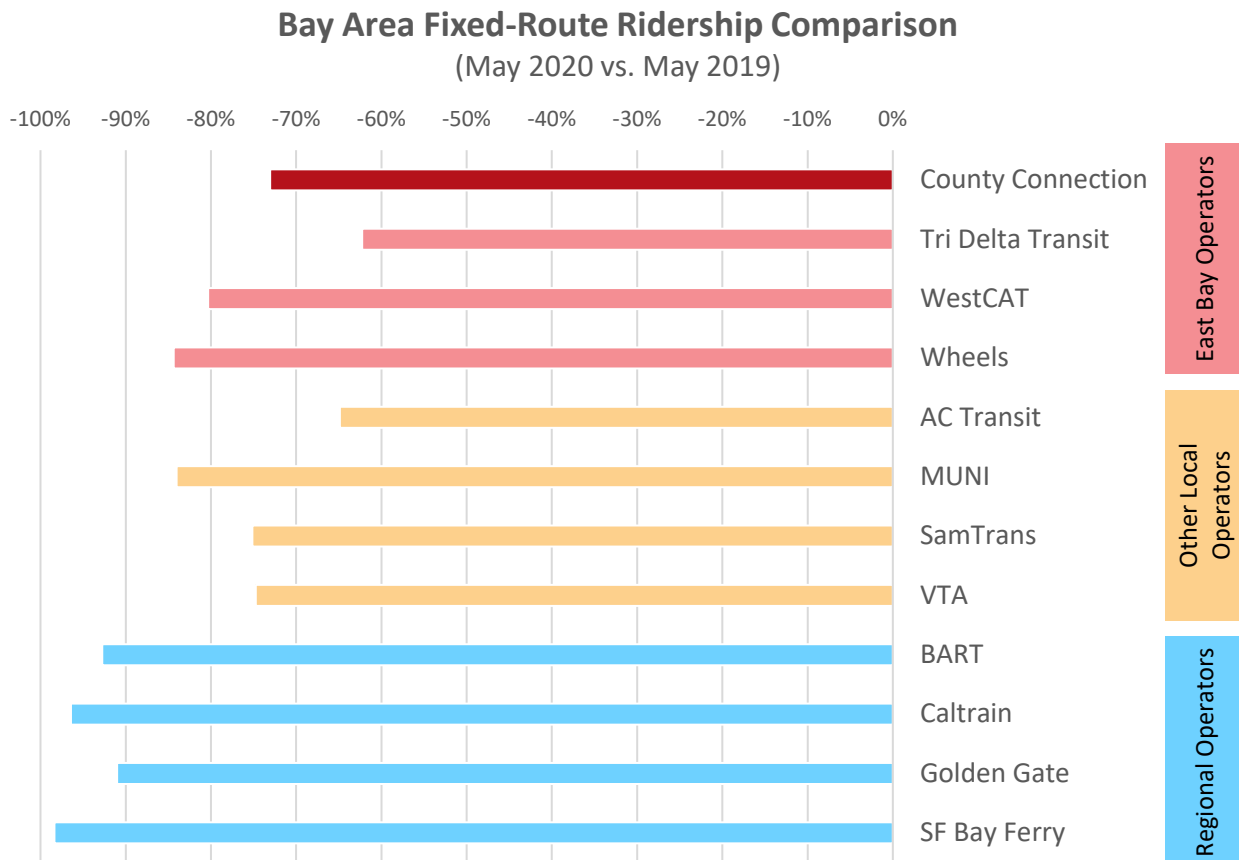
Ridership Distribution by Time of Day



Regional Trends:

In the San Francisco Bay Area, overall transit ridership was down 84% in May 2020 compared to the same month last year. County Connection’s ridership declines and subsequent recovery trends have been relatively consistent with other local transit operators in the region. In contrast,

regional transit providers in the Bay Area, including BART, have experienced more significant drops in ridership and slower rates of recovery. Similar to County Connection’s express routes, this is likely due to the fact that these regional services tend to serve a more traditional commute market, and in particular, one that is able to work from home. The chart below shows the decline in fixed-route ridership in May 2020 compared to the prior year for various operators across the region.



Source: NTD Monthly Module Adjusted Data Release

Financial Implications:

None.

Recommendation:

None, for information only.

Action Requested:

None, for information only.