

To: Advisory Committee

Date: February 26, 2026

From: Pranjal Dixit, Manager of Planning

Reviewed by: AMS

SUBJECT: Fixed Route Peer Agency Comparison

Background:

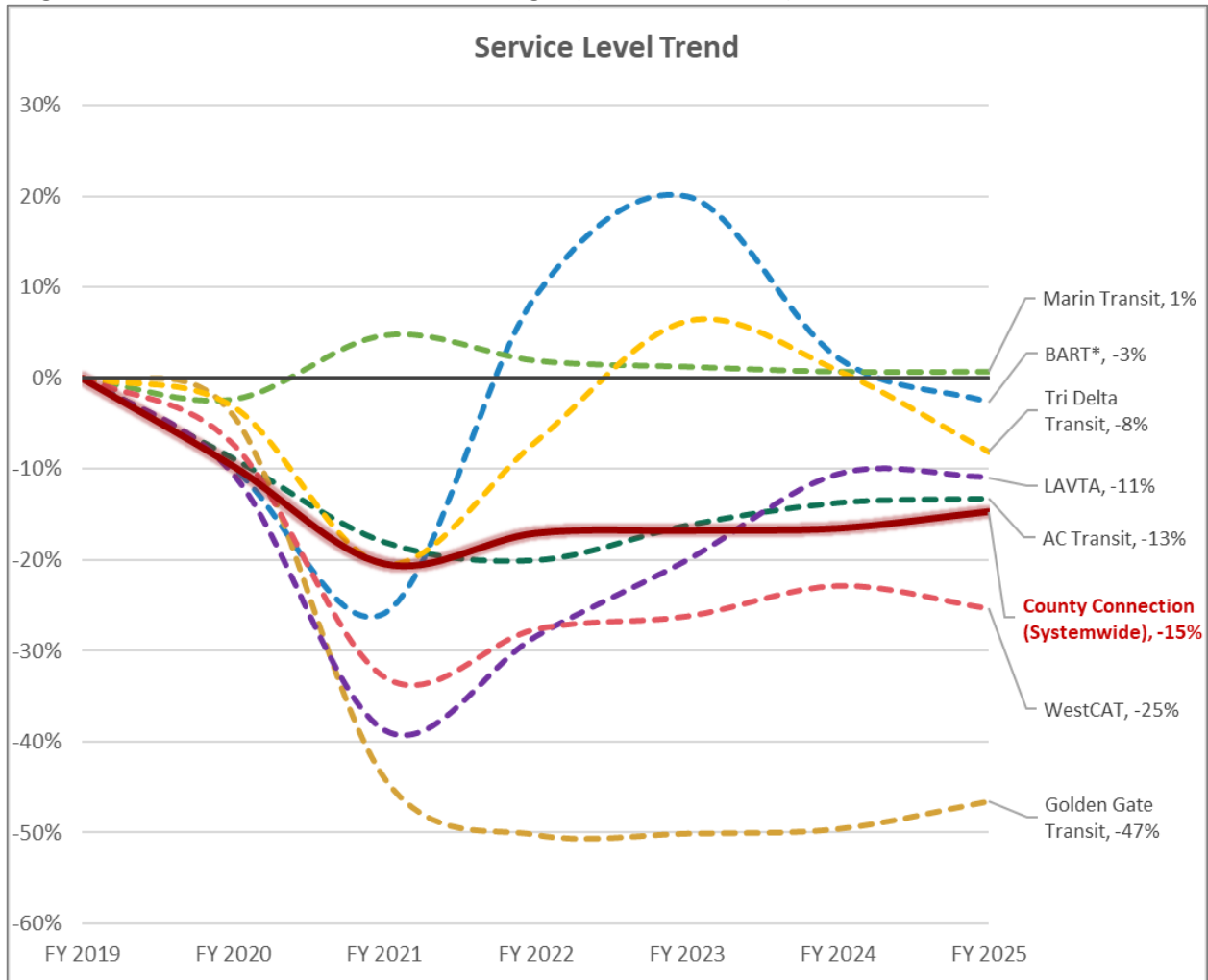
Bay Area transit ridership endured a drastic and uneven decline during the COVID-19 pandemic. While experiencing a slight downward trend pre-pandemic, the implementation of stay-at-home orders in March 2020 triggered a precipitous drop of over 74% regionwide, from 41.4 million passenger trips per month to under 10.4 million by the end of Fiscal Year (FY) 2021. However, this decline was not uniform, with commuter-focused routes facing the most significant impacts. As restrictions eased, ridership gradually recovered but still remains at only 64% of pre-pandemic levels regionwide, highlighting the ongoing challenge. Notably, the nature of this recovery has been vastly different for suburban transit agencies like County Connection, Tri Delta Transit, WestCAT, and Tri-Valley Wheels (LAVTA), compared to urban-centric agencies like Muni, AC Transit, SamTrans, and VTA.

Service Levels:

In response to the pandemic's impact on ridership, Bay Area bus operators implemented multiple service adjustments between 2020 and 2023. County Connection, for example, initially reduced service in response to low ridership and operator availability, and prioritizing access to essential jobs and services over peak-hour frequency. Notably, Marin Transit took a contrasting approach, increasing local service to address social distancing by reducing passenger density, highlighting the diverse strategies adopted by various agencies. Following an initial cut in service, BART expanded its service, driven largely by the opening of the Berryessa/North San José extension; however, service levels have more recently been adjusted to better align with demand.

With the gradual return to normalcy, service restorations began in FY 2022. County Connection reinstated school services and reallocated resources to routes along the Monument Corridor and other high ridership areas, boosting local and weekend services in low-income and minority communities. Tri Delta Transit, on the other hand, initially expanded service with the opening of the Oakley Park & Ride facility but later reduced their service in response to lower demand. Meanwhile, LAVTA implemented a comprehensive service realignment based on community feedback to optimize coverage and better balance service levels across its service area. Facing continued remote work trends, Golden Gate Transit, with its historically commuter-focused route structure, has opted to maintain service levels close to those first implemented at the start of the pandemic. These trends are shown in Figure A below, which also includes AC Transit and WestCAT.

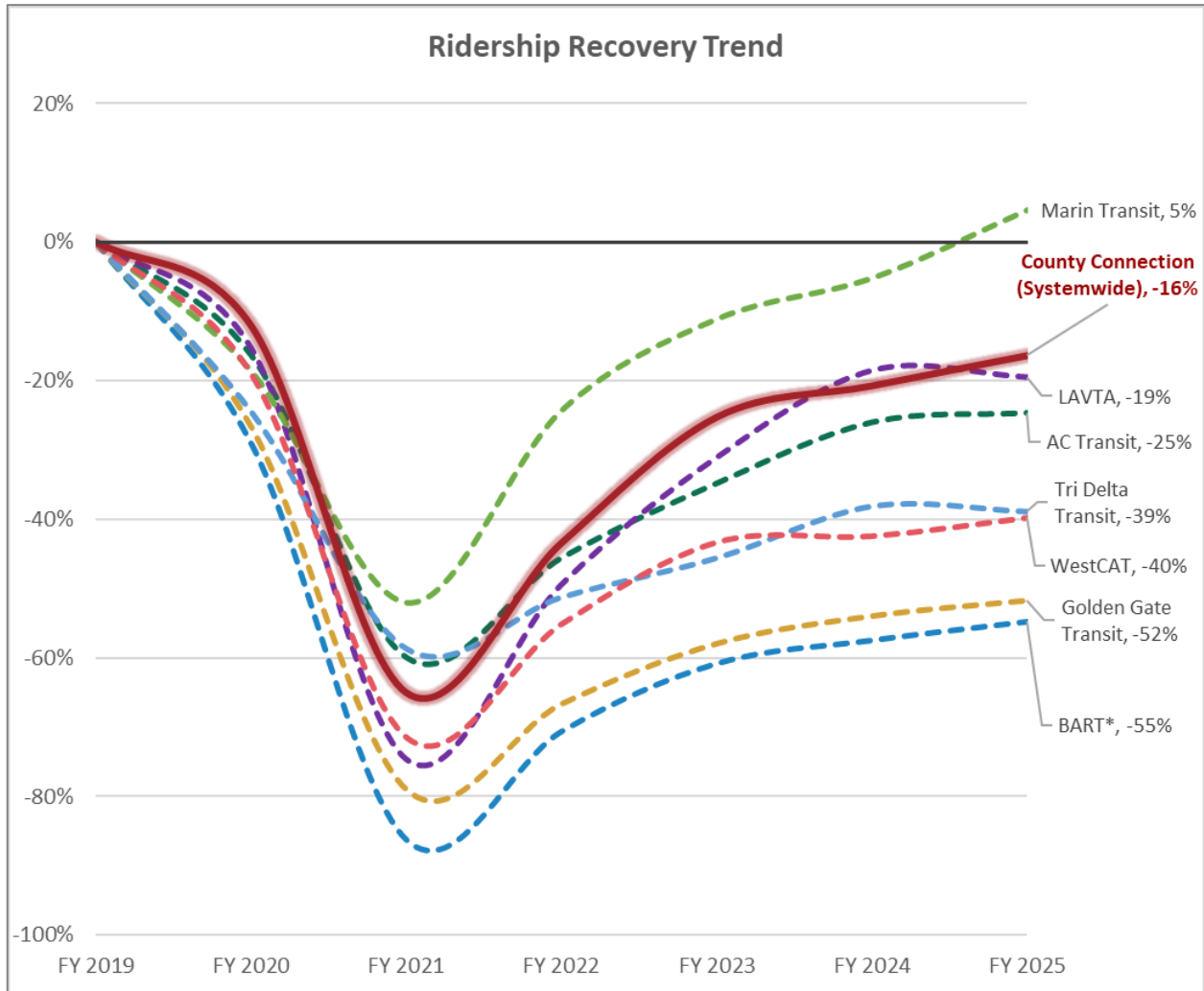
Figure A: Post-Pandemic Service Level Changes (FY 2019 - FY 2025)



Ridership:

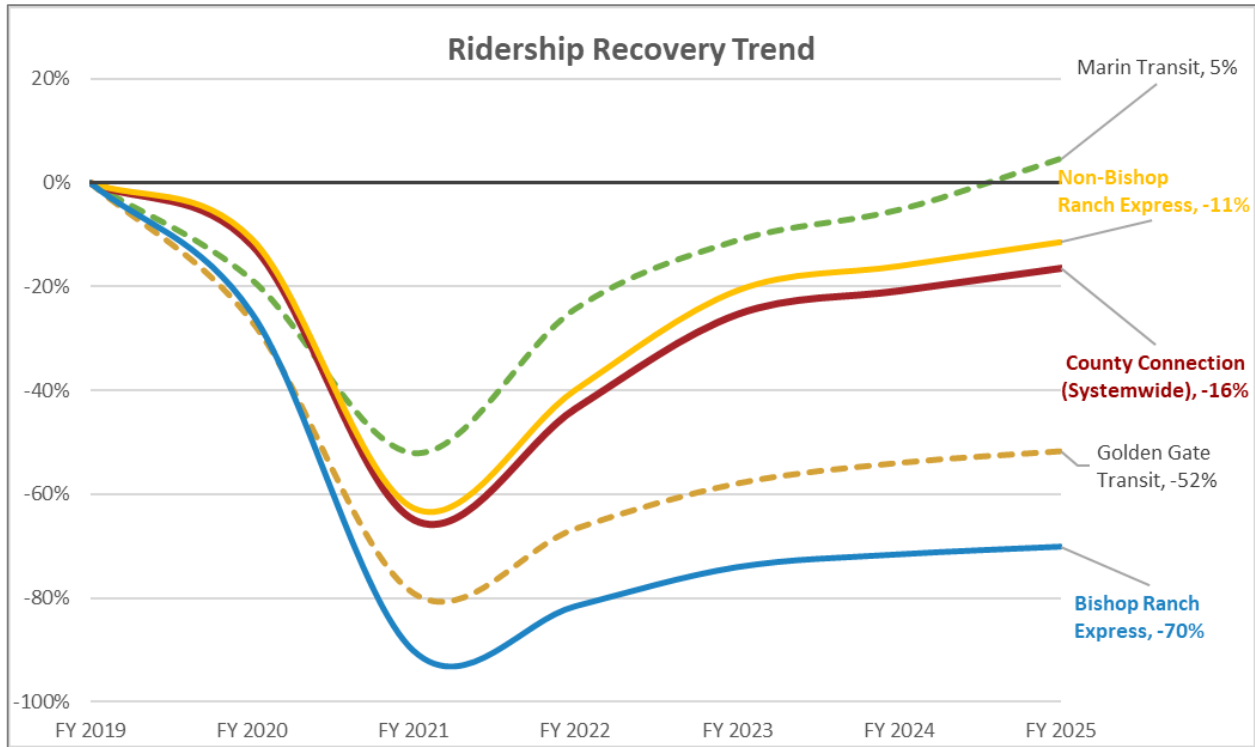
In March 2020, ridership dropped across all transit systems at the onset of the shelter-at-home order as business closed and many office commuters started working remotely. The pandemic also highlighted social inequities, as essential workers, who are disproportionately low-income and minority, continued to rely on transit throughout pandemic. Now almost six years since the start of the pandemic, the demand for commuter service remains low but the demand for local and weekend service continues to rise. As demonstrated in Figure B below, this dynamic landscape underscores the ongoing adaptation of Bay Area bus operators to evolving needs, with a growing focus on serving low-income and minority communities disproportionately affected by the pandemic and service reductions.

Figure B: Post-Pandemic Ridership Recovery (FY 2019 - FY 2023)



Marin Transit and Golden Gate Transit offer an interesting point of comparison to County Connection’s own service. The service areas of these two transit agencies overlap, with Marin Transit’s route structure oriented around local routes, and Golden Gate Transit’s oriented around longer-distance commute-oriented routes. While Marin Transit’s ridership has exceeded pre-pandemic levels due to its focus on local all-day service, Golden Gate Transit continues to feel the effects of a reduced San Francisco commute demand. County Connection exhibits a similar trend when comparing its local and commuter express services. While our peak-hour express service to Bishop Ranch (Routes 92X, 95X, 96X, and 97X) follows the same weak trend seen at Golden Gate Transit, our local routes mirror the strong growth observed by Marin Transit, as illustrated in Figure C below.

Figure C: Post-Pandemic Ridership Recovery (Marin Transit/Golden Gate Transit vs. County Connection)



To better serve the I-680 corridor, staff is actively planning to restructure County Connection’s express routes to better serve current demand. In partnership with LAVTA, County Connection intends to shift these routes to an all-day model, effectively bridging the “rail gap” between the Walnut Creek and Dublin/Pleasanton BART stations while maintaining vital commute-hour support.

Financial Implications:

None, for information only.

Recommendation:

None, for information only.

Action Requested:

None, for information only.

Attachments:

None.