

NORTH COUNTY TRANSIT

SAN DIEGO RAILROAD



Service Implementation Plan

FY 2026

Presented June 2025

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INTRODUCTION

Background

The Service Implementation Plan (SIP) outlines North County Transit District – San Diego Railroad’s (NCTD, District) plans to provide multimodal transit services over the next five (5) years. The SIP is a requirement under the Master Memorandum of Understanding (MOU) with the San Diego Association of Governments (SANDAG) and is used to inform NCTD’s annual operating budget.

The SIP development process consists of the compilation and review of historic service levels, ridership, and studies that outline capital and operating investments for the District. Planning coordinates with Finance, Bus Operations, and Rail Operations to review and develop the assumptions. Finance staff calculates the cost associated with the proposed services. The costs are then included in the proposed NCTD annual operating budget for Board approval.

Key Assumptions

NCTD uses conservative estimates to forecast ridership. The conservative projection is consistent with Board Policy No. 17 - Budget Development, which requires staff to conservatively estimate revenues and expenses. The conservative forecast allows NCTD to stress test and confirm that the budget for the upcoming fiscal year will be balanced under the assumed worst-case scenario.

Ridership estimates for the FY2026 SIP are based on observed mode-specific ridership trends. Both year-over-year (YOY) ridership changes and anticipated service levels for each mode factor into projections. Miles and hours projections are based primarily on scheduled daily service, while service statistics for on-demand modes, such as LIFT and NCTD+, are based on projected ridership. Absolute work windows, holidays, and special events are also considered in both service and ridership projections. Other factors—such as uncertain funding projections, changing travel patterns, station redevelopment efforts, and evolving land use and development patterns—influence the phasing of proposed service changes.

Strategic Priorities

Uncertain funding projections at all levels of government, coupled with decreasing sales tax revenues, pose significant challenges in projecting future service levels. Should the current forecast continue without the introduction of a new funding source, NCTD will likely need to reduce service levels in future years. This service reduction may impact all NCTD modes. With this uncertainty in mind, the FY2026 Service Implementation Plan has been developed to support strategic investments that can be implemented over a five-year period that aim to increase ridership and address capital priority needs while being mindful of a constrained resource environment. Key strategic service priorities that are relevant to the five-year horizon of the Service Implementation Plan include:



- Strategically expand first-last mile services through NCTD+ as funding permits
- Conduct a Bus Network Redesign to restructure the BREEZE network of routes under a variety of funding scenarios
- Complete grant-funded construction of two new stations along the COASTER corridor that will serve major regional events
- Advance project activities that will support the future implementation of 15-minute frequencies on SPRINTER

In January 2025, NCTD submitted a Caltrans Planning Grant application to conduct a Bus Network Redesign. At the time of the development of the Service Implementation Plan, NCTD is awaiting the results of the grant application. The Bus Network Redesign is a comprehensive study that will assess opportunities to restructure the BREEZE bus network to increase ridership. The study will include three key scenarios, including a reduced funding scenario, maintenance of funding scenario, and increased funding scenario. Service scenarios and cost estimates would be developed as part of the study and incorporated in future Service Implementation Plans upon final adoption of the plan and appropriate financial outlook.

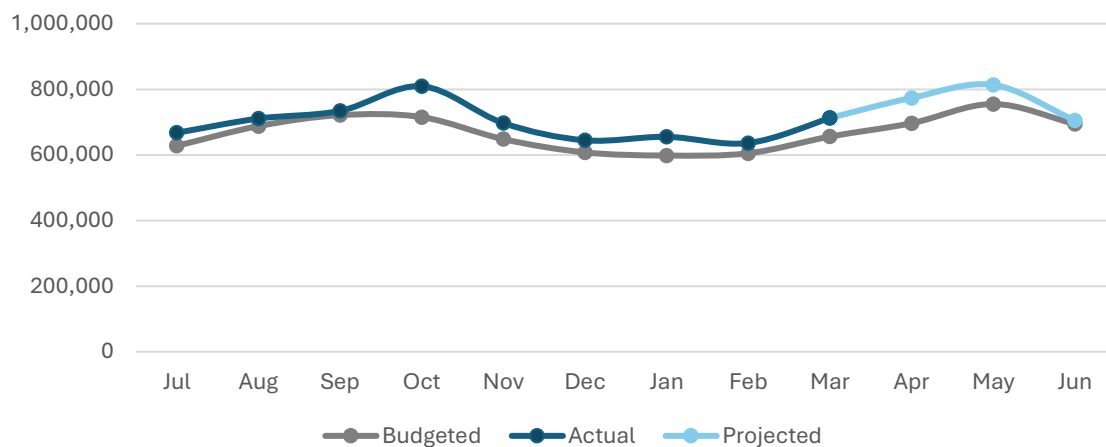
FY2026 SERVICE STATISTICS & RIDERSHIP



System Summary

Service statistics and ridership projections are reviewed each budget cycle to reflect actual performance and to assess the accuracy of previous forecasts. The FY2025 Service Implementation Plan (SIP), developed in spring 2024, incorporated ridership and service data from July 2023 to February 2024. NCTD projected a 4% increase in ridership by the end of FY2025, aiming to reach 77.1% of pre-pandemic levels. Forecasts were based on service restoration and additional service increases on high-performing BREEZE routes, the introduction of new NCTD+ microtransit zones, and the continued ridership benefits of COASTER special event service and the Youth Opportunity Pass program. As shown in Figure 1, monthly systemwide ridership in FY2025 has surpassed budgeted figures and is projected to continue to for the remainder of the year.

Figure 1. Systemwide Monthly Ridership, FY2025



NCTD is implementing significant changes in the upcoming fiscal year that are expected to enhance service quality and customer satisfaction. Most notably, the agency will be transitioning to in-house bus operations in FY2026. The change will impact BREEZE, FLEX, LIFT, and NCTD+, and the transition is expected to improve service reliability and reduce operator turnover. FY2026 service levels and ridership forecasts by mode are summarized in Table 1. Systemwide ridership is projected to increase 4.9% in FY2026 to almost nine million boardings or 86.4% of pre-pandemic levels. NCTD continues to explore and advance additional customer-focused initiatives to attract new riders.

Table 1. Projected Ridership & Operating Statistics, FY2026

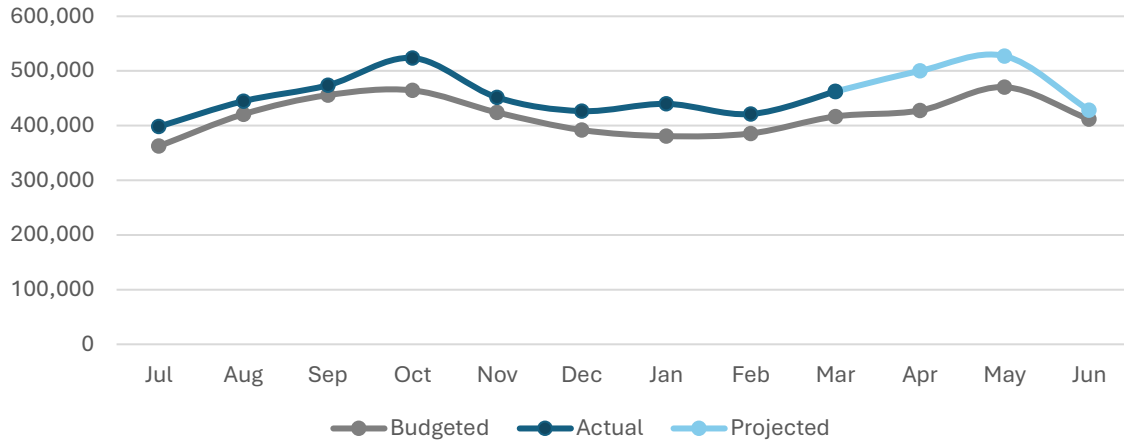
Mode/Metric	Ridership	Revenue Miles	Total Miles	Revenue Hours	Total Hours
BREEZE	5,735,171	5,062,584	5,759,795	429,066	465,347
SPRINTER	1,998,260	518,850	521,083	23,585	23,738
COASTER	919,746	401,139	426,825	12,302	13,708
LIFT	118,861	1,186,922	1,282,687	66,037	78,884
FLEX	130,517	373,196	466,507	26,542	30,772
NCTD+	77,514	230,635	312,883	23,546	31,464
System Total	8,980,069	7,773,326	8,769,780	581,078	643,913

BREEZE

BREEZE service changes outlined in the FY2025 SIP included the restoration of service levels on remaining BREEZE routes that had been reduced due the COVID-19 operator shortage, the reintroduction of BREEZE 408 special event service, and FY2025 Q3 frequency increases on four of NCTD’s highest-performing BREEZE routes. The FY2025 SIP projected a 7.4% increase in ridership by the end of FY2025 and annual ridership 77.1% of pre-pandemic levels.

Restoration of BREEZE service levels were completed in June 2024. Further BREEZE frequency increases have been postponed and two low-performing routes are set to be discontinued during the May 2025 service change. Despite these changes, BREEZE ridership in FY2025 has benefited from more accurate reporting due to the Federal Transit Administration’s certification of its bus fleet’s automated passenger counters on May 23, 2024. As shown in Figure 2, BREEZE monthly ridership in FY2025 has exceeded all budgeted projections and total year-to-date (YTD) boardings are 8.9% above expectations.

Figure 2. BREEZE Monthly Ridership, FY2025



The only change to BREEZE service planned in FY2026 is the reintroduction of BREEZE 408 special event service in the fourth quarter. As shown in Figure 3 and detailed in Table 2, ridership is anticipated to increase 4.3%—from an estimated 5.5 million boardings in FY2025 to roughly 5.7 million in FY2026.

Figure 3. BREEZE Actual & Projected Ridership, FY24-FY26

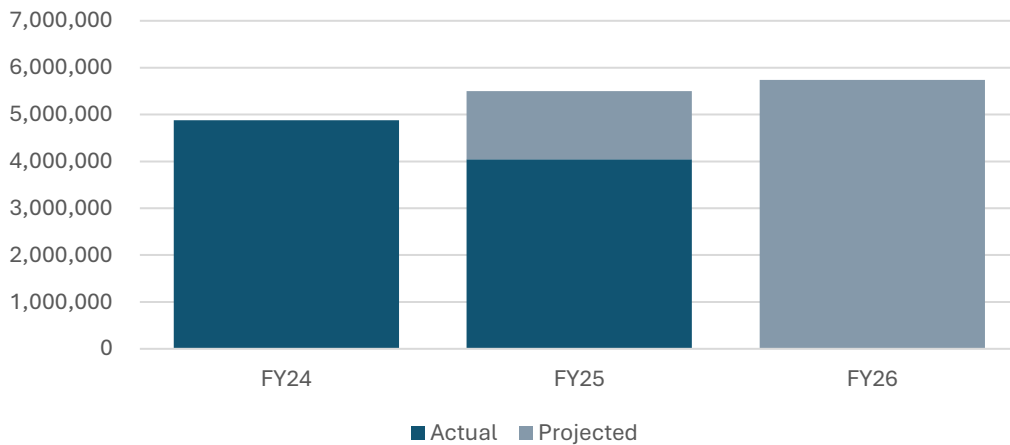


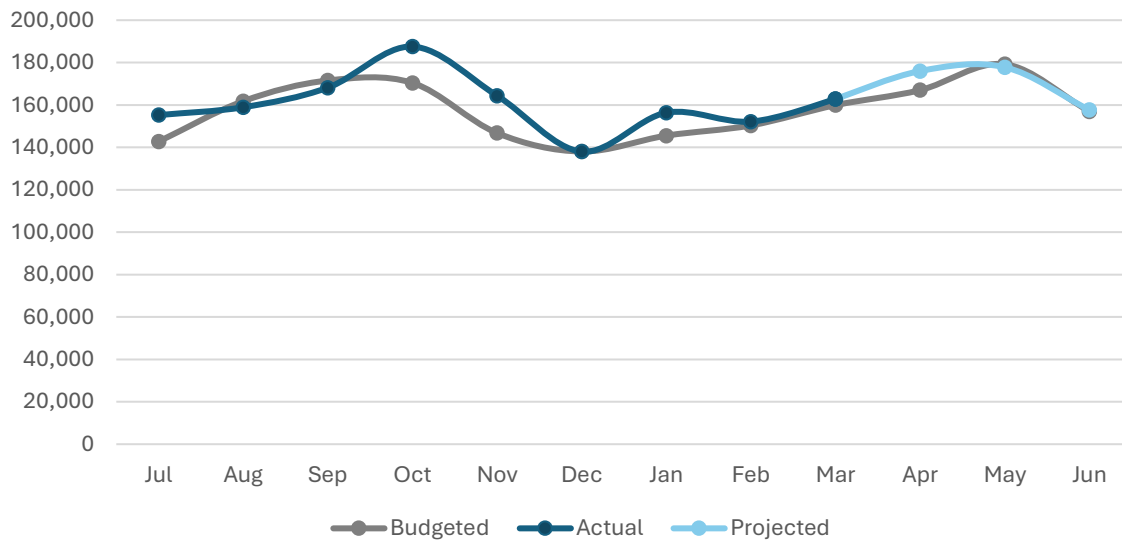
Table 2. BREEZE Ridership & Operating Statistics, FY24-FY26

BREEZE	FY24 Actuals	FY25 Actuals & Projected	FY26 Proposed	Change from FY24 to FY26	Change from FY25 to FY26
Total Ridership	4,876,019	5,497,704	5,735,171	17.6%	4.3%
Total Revenue Miles	4,892,488	5,068,291	5,062,584	3.5%	-0.1%
Total Miles	5,608,830	5,877,533	5,759,795	2.7%	-2.0%
Total Revenue Hours	411,851	429,154	429,066	4.2%	0.0%
Total Hours	441,144	463,297	465,347	5.5%	0.4%

SPRINTER

The FY2025 SIP projected SPRINTER ridership would increase 2.8% in FY2025 to just under 1.9 million. As illustrated in Figure 4, monthly ridership has largely exceeded budgeted goals with YTD ridership surpassing expectations by 4.1% and total boardings having increased 4.6% over the same period last year.

Figure 4. SPRINTER Monthly Ridership, FY2025



As illustrated in Figure 5, SPRINTER is expected to continue its growth trend, increasing by 4% to nearly two million boardings in FY2026. In addition, there are no SPRINTER service changes proposed in FY2026 and any changes in operating statistics shown in Table 3 reflect minor variations in the share of weekdays, Saturdays, and Sundays between each fiscal year.

Figure 5. SPRINTER Actual & Projected Ridership, FY24-FY26

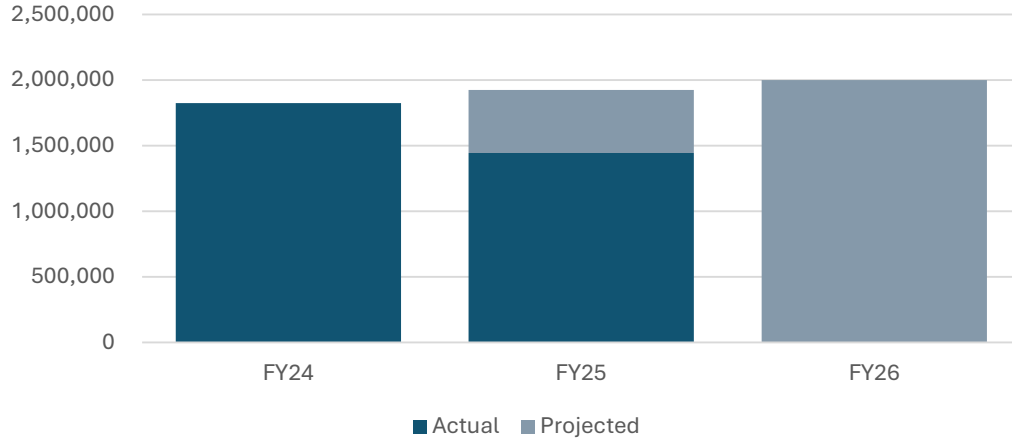


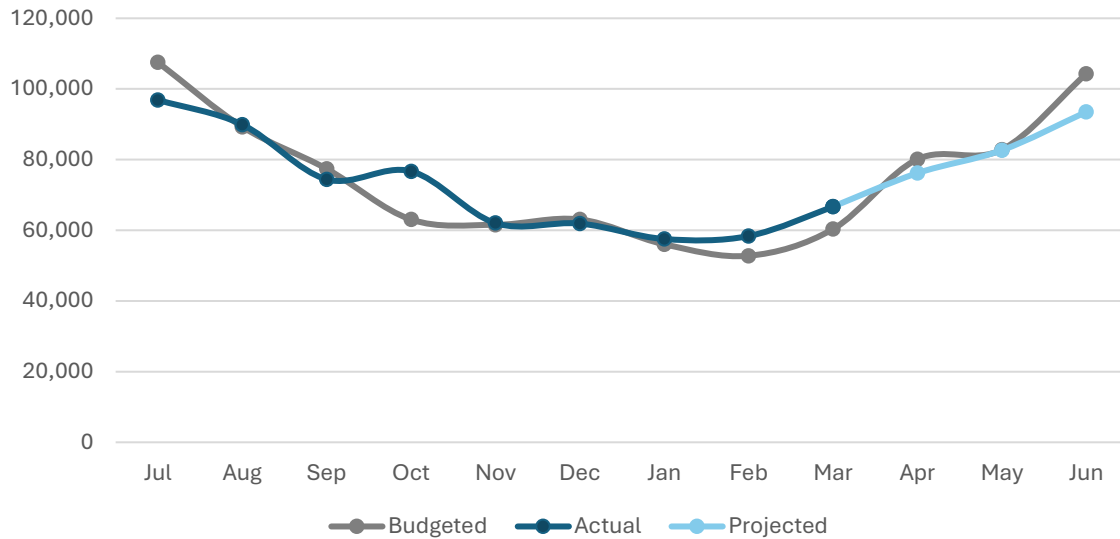
Table 3. SPRINTER Ridership & Operating Statistics, FY24-FY26

SPRINTER	FY24 Actuals	FY25 Actuals & Projected	FY26 Proposed	Change from FY24 to FY26	Change from FY25 to FY26
Total Ridership	1,822,849	1,922,174	1,998,260	9.6%	4.0%
Total Revenue Miles	512,781	503,962	518,850	1.2%	3.0%
Total Miles	516,671	506,892	521,083	0.9%	2.8%
Total Revenue Hours	23,296	22,911	23,585	1.2%	2.9%
Total Hours	23,497	23,081	23,738	1.0%	2.8%

COASTER

Year-to-date ridership on COASTER has increased 5.3% compared to the previous fiscal year—higher than the 3.3% increase projected in the FY2025 SIP. However, as shown in Figure 6, COASTER monthly ridership compared to budgeted goals has been varied. July 2024 ridership, for example, was almost 10% below budgeted while the Padres’ post-season appearance helped October 2024 ridership surpass the budgeted goal by 21.7%.

Figure 6. COASTER Monthly Ridership, FY2025



As illustrated in Figure 7, over 900,000 COASTER boardings are projected in FY2026—a 2.6% increase over current year. Like SPRINTER, no service expansions are planned in FY2026 and the slight changes in operating statistics detailed in Table 4 largely reflect variations in the number of weekdays, Saturdays, and Sundays.

Figure 7. COASTER Actual & Projected Ridership, FY24-FY26

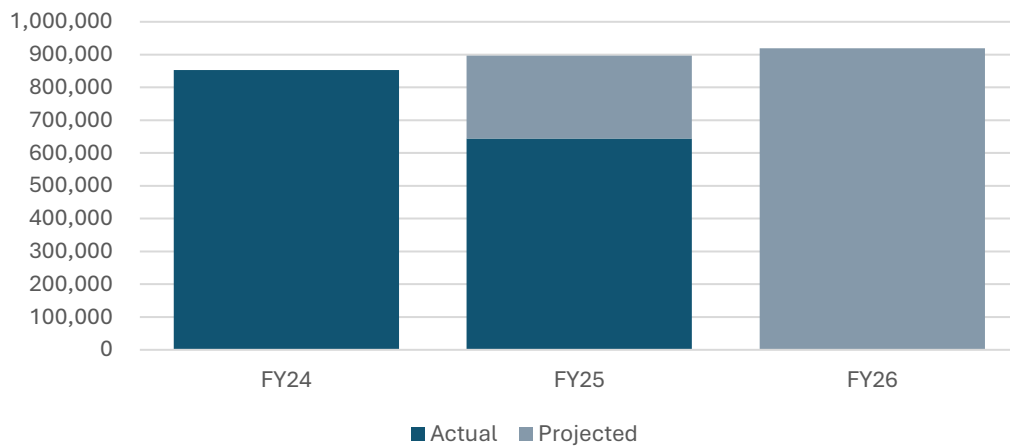


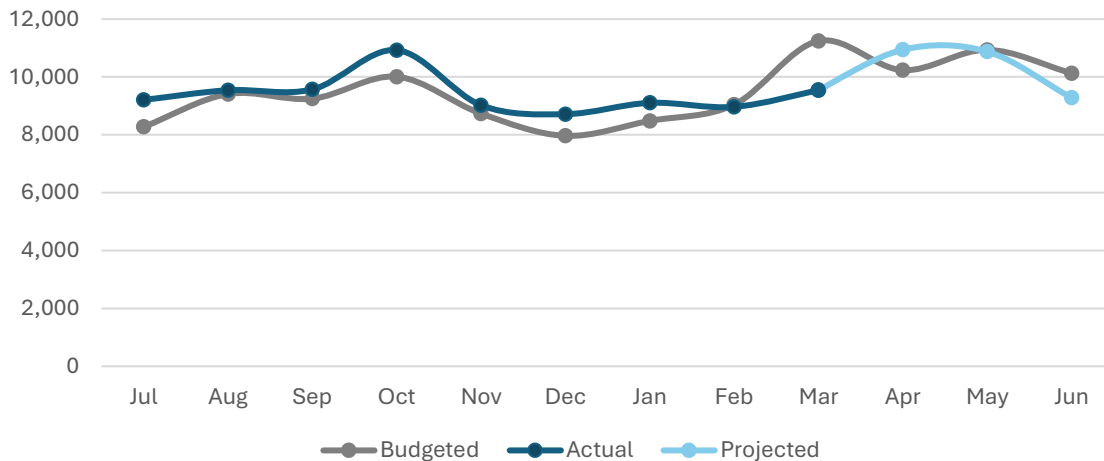
Table 4. COASTER Ridership & Operating Statistics, FY24-FY26

COASTER	FY24 Actuals	FY25 Actuals & Projected	FY26 Proposed	Change from FY24 to FY26	Change from FY25 to FY26
Total Ridership	852,993	896,810	919,746	7.8%	2.6%
Total Revenue Miles	399,691	401,289	401,139	0.4%	0.0%
Total Miles	425,396	426,959	426,825	0.3%	0.0%
Total Revenue Hours	12,274	12,320	12,302	0.2%	-0.1%
Total Hours	13,673	13,727	13,708	0.3%	-0.1%

LIFT

As shown in Figure 8, LIFT ridership has largely outperformed monthly budgeted goals in FY 2025—exceeding the budgeted goal for seven of the past nine months of actual data. Overall YTD ridership in FY2025 has exceeded budget by 2.7% and is projected to exceed the annual budgeted goal by 1.7%

Figure 8. LIFT Monthly Ridership, FY2025



As illustrated in Figure 9, LIFT ridership is projected to increase to close to 120,000 boardings in FY2026. Table 5 shows that this 2.7% increase in ridership is expected result in a 22.7% increase in revenue miles and a 17.4% increase in revenue hours.

Figure 9. LIFT Actual & Projected Ridership, FY24-FY26

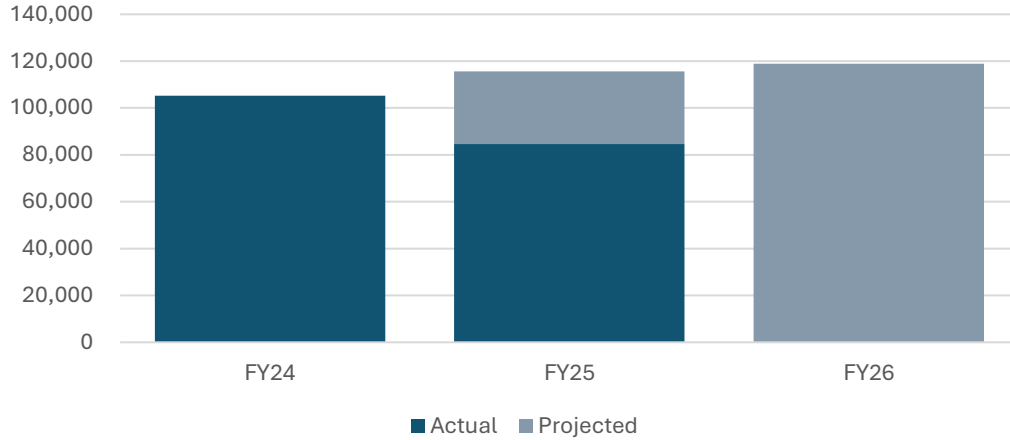


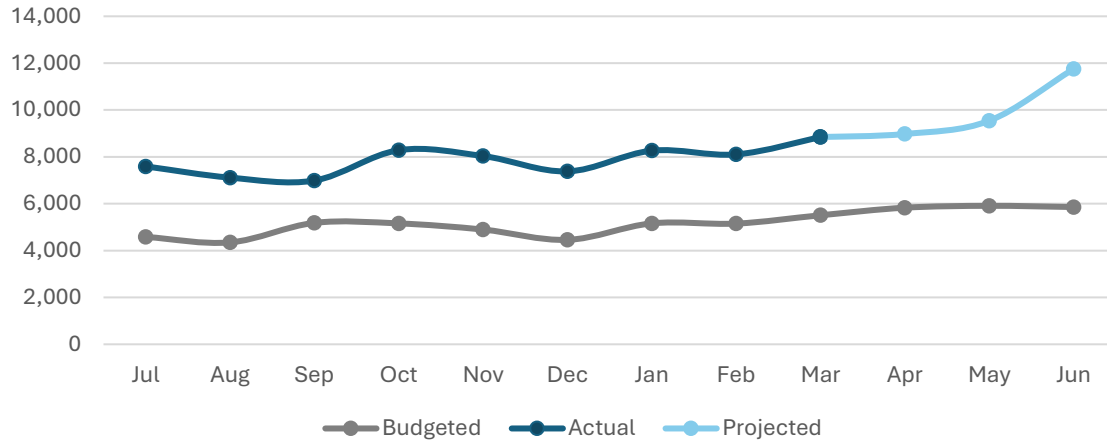
Table 5. LIFT Ridership & Operating Statistics, FY24-FY26

LIFT	FY24 Actuals	FY25 Actuals & Projected	FY26 Proposed	Change from FY24 to FY26	Change from FY25 to FY26
Total Ridership	105,244	115,683	118,861	12.9%	2.7%
Total Revenue Miles	903,563	967,296	1,186,922	31.4%	22.7%
Total Miles	995,221	1,045,379	1,282,687	28.9%	22.7%
Total Revenue Hours	53,654	56,259	66,037	23.1%	17.4%
Total Hours	61,515	64,288	78,884	28.2%	22.7%

FLEX

Strong, sustained growth on the original FLEX routes and the introduction of COASTER Connection service in late FY2024 have contributed to the monthly overperformance illustrated in Figure 10. Year-to-date FLEX ridership has surpassed projections by 58.9% and total boardings have increased 105.8% year-over-year.

Figure 10. FLEX Monthly Ridership, FY2025



As illustrated in Figure 11, FLEX ridership is anticipated to continue to increase in FY2026. The inclusion of COASTER and FLEX services into the U-Pass program for UC San Diego’s students is expected to further improve ridership on COASTER Connection services. Table 6 shows annual ridership is projected to increase by 29.4% in FY2026.

Figure 11. FLEX Actual & Projected Ridership, FY24-FY26

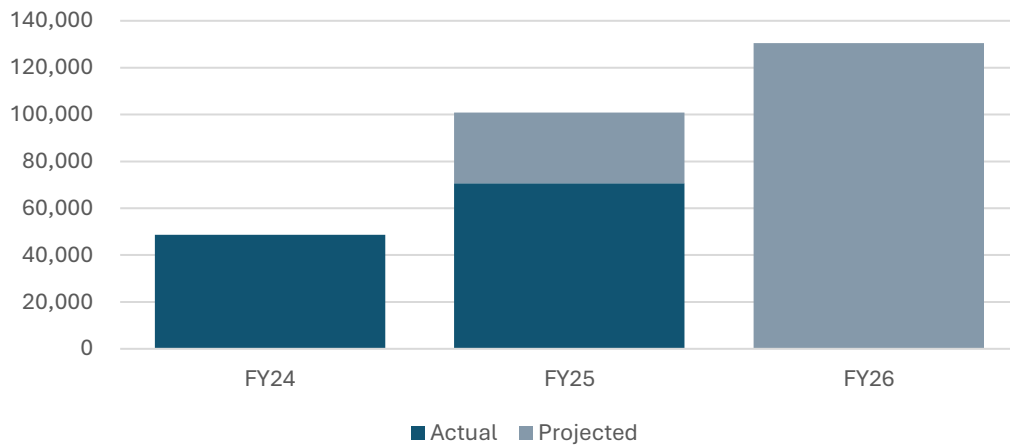


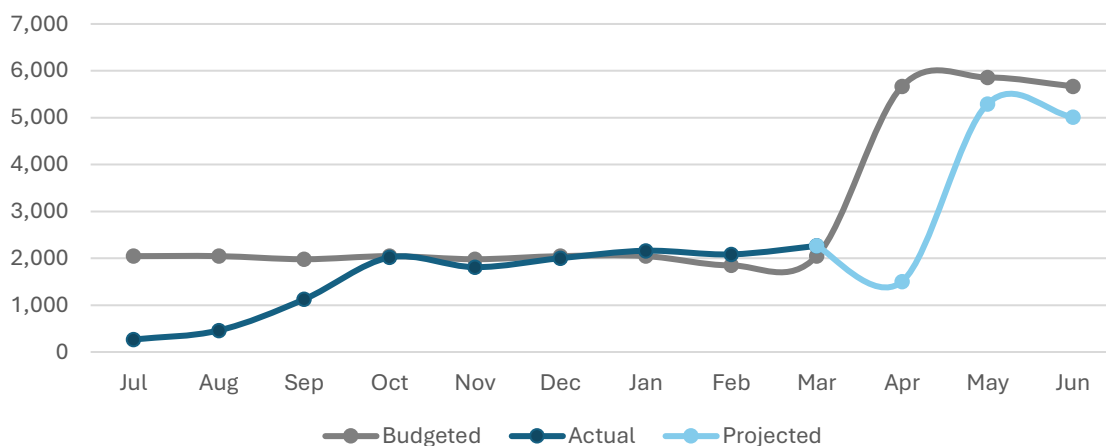
Table 6. FLEX Ridership & Operating Statistics, FY24-FY26

FLEX	FY24 Actuals	FY25 Actuals & Projected	FY26 Proposed	Change from FY24 to FY26	Change from FY25 to FY26
Total Ridership	48,663	100,882	130,517	168.2%	29.4%
Total Revenue Miles	320,948	392,137	373,196	16.3%	-4.8%
Total Miles	337,743	481,484	466,507	38.1%	-3.1%
Total Revenue Hours	17,414	25,948	26,542	52.4%	2.3%
Total Hours	18,472	33,146	30,772	66.6%	-7.2%

NCTD+

In late FY2024, NCTD introduced its on-demand microtransit service, NCTD+, as a pilot in San Marcos. As illustrated in Figure 12, the service ramped up quickly and started reaching its ridership targets after only four months of service. The District anticipates continued ridership growth with the launch of the Vista NCTD+ pilot zone and the continuation of regular service in San Marcos.

Figure 12. NCTD+ Monthly Ridership, FY2025



As shown in Figure 13, NCTD+ ridership is anticipated to increase significantly in FY2026 with a full year of microtransit service in Vista and San Marcos. Additionally, NCTD intends to pursue Flexible Fleets funding through the San Diego Association of Governments to support the launch of a third pilot zone in Fallbrook and Pala. As a result, Table 7 shows annual ridership is projected to increase by 198.1% in FY2026.

Figure 13. NCTD+ Actual & Projected Ridership, FY24-FY26

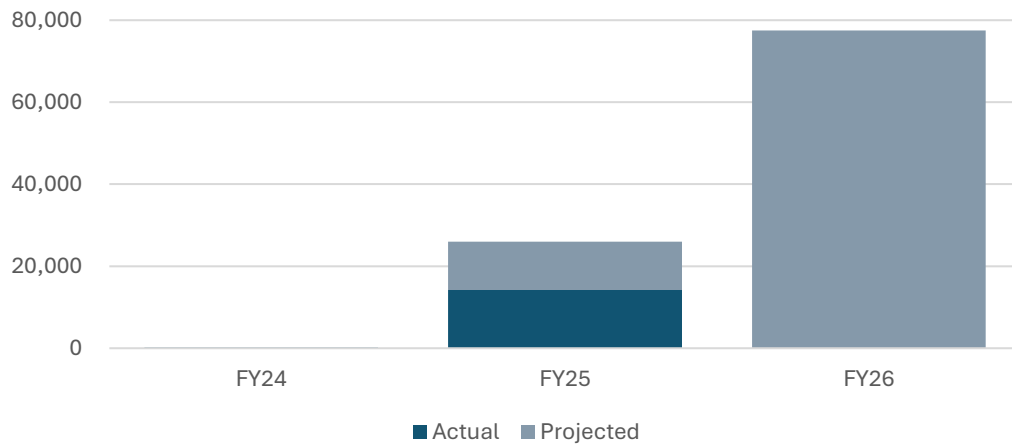


Table 7. NCTD+ Ridership & Operating Statistics, FY24-FY26

NCTD+	FY24 Actuals	FY25 Actuals & Projected	FY26 Proposed	Change from FY24 to FY26	Change from FY25 to FY26
Total Ridership	146	26,002	77,514	52,991.8%	198.1%
Total Revenue Miles	562	84,968	230,635	40,969.7%	171.4%
Total Miles	3,523	127,584	312,883	8,780.5%	145.2%
Total Revenue Hours	113	8,319	23,546	20,726.1%	183.0%
Total Hours	711	12,366	31,464	4,322.7%	154.4%

Five-Year Outlook



The Service Implementation Plan includes a five-year outlook that is updated annually with each budget cycle. This planning horizon allows the District to align major capital and operations projects with future operating projections. The FY2026 Service Implementation Plan was developed within the context of an uncertain funding outlook. The SIP's objectives are outlined in Figure 14.

Figure 14. SIP Objectives

Strengthen network foundations

- **BREEZE:** Restructure the BREEZE bus network through a comprehensive Bus Network Redesign
- **SPRINTER:** Modernize the fleet and improve service reliability, laying the groundwork for future service expansions
- **COASTER:** Complete new station construction and provide direct connections to key landmarks, such as the San Diego Convention Center, Petco Park, and the Del Mar Fair Grounds
- **COASTER:** Restructure service to reflect changing return-to-work patterns and leisure-based travel trends.

Complement network with on-demand service

- **NCTD+:** Transition existing pilot zones to regular service
- **NCTD+:** Strategically pilot on-demand zones to expand coverage and facilitate first-last mile connections to high-frequency corridors
- **LIFT:** Maintain quality LIFT service to meet increased demand associated with changing demographics

Figure 15 charts current and project ridership and service levels from FY2024 through FY2030. As existing services are improved and coverage is expanded, NCTD estimates ridership will increase 10.7% to over 9.4 million boardings in FY2030. Table 8 to Table 13 detail projected modal ridership and operating statistics from FY2026 to FY2030.

Figure 15. Systemwide Actual & Projected Ridership and Service Levels, FY24-FY34

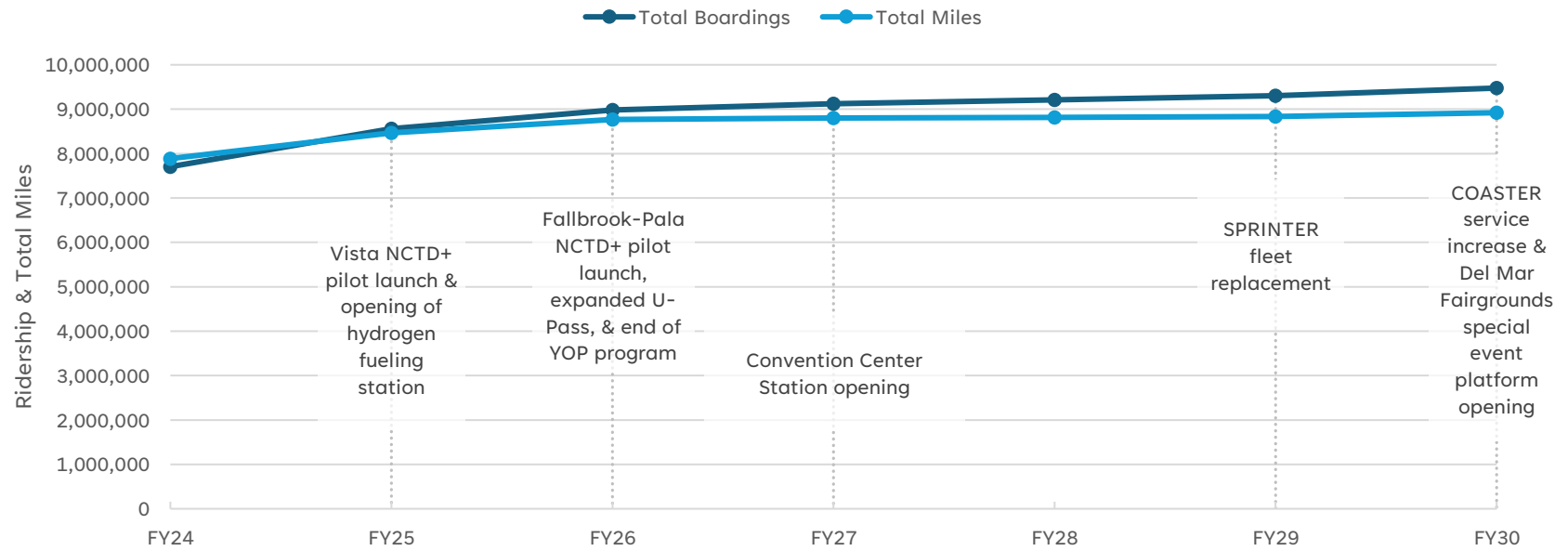


Table 8. BREEZE Ridership & Service Forecast, FY26-FY30

BREEZE	FY2026	FY2027	FY 2028	FY2029	FY2030
Total Ridership	5,735,171	5,826,574	5,884,840	5,943,688	6,003,125
Total Revenue Miles	5,062,584	5,062,584	5,062,584	5,062,584	5,062,584
Total Miles	5,759,795	5,759,795	5,759,795	5,759,795	5,759,795
Total Revenue Hours	429,066	429,066	429,066	429,066	429,066
Total Hours	465,347	465,347	465,347	465,347	465,347

Table 9. SPRINTER Ridership & Service Forecast, FY26-FY30

SPRINTER	FY2026	FY2027	FY 2028	FY2029	FY2030
Total Ridership	1,998,260	2,018,243	2,038,425	2,058,809	2,079,397
Total Revenue Miles	518,850	518,850	518,850	518,850	518,850
Total Miles	521,083	521,083	521,083	521,083	521,083
Total Revenue Hours	23,585	23,585	23,585	23,585	23,585
Total Hours	23,738	23,738	23,738	23,738	23,738

Table 10. COASTER Ridership & Service Forecast, FY26-FY30

COASTER	FY2026	FY2027	FY 2028	FY2029	FY2030
Total Ridership	919,746	941,964	951,384	960,898	1,049,596
Total Revenue Miles	401,139	412,384	412,384	412,384	479,596
Total Miles	426,825	438,790	438,790	438,790	510,306
Total Revenue Hours	12,302	12,647	12,647	12,647	14,708
Total Hours	13,708	14,092	14,092	14,092	16,389

Table 11. LIFT Ridership & Service Forecast, FY26-FY30

LIFT	FY2026	FY2027	FY 2028	FY2029	FY2030
Total Ridership	118,861	120,335	121,538	122,753	123,981
Total Revenue Miles	1,186,922	1,201,641	1,213,654	1,225,787	1,238,049
Total Miles	1,282,687	1,298,594	1,311,576	1,324,687	1,337,939
Total Revenue Hours	66,037	66,853	67,521	68,196	68,878
Total Hours	78,884	79,862	80,661	81,467	82,282

Table 12. FLEX Ridership & Service Forecast, FY26-FY30

FLEX	FY2026	FY2027	FY 2028	FY2029	FY2030
Total Ridership	130,517	134,469	136,505	137,870	139,249
Total Revenue Miles	373,196	373,196	373,196	373,196	373,196
Total Miles	466,507	466,507	466,507	466,507	466,507
Total Revenue Hours	26,542	26,542	26,542	26,542	26,542
Total Hours	30,772	30,772	30,772	30,772	30,772

Table 13. NCTD+ Ridership & Service Forecast, FY26-FY30

NCTD+	FY2026	FY2027	FY 2028	FY2029	FY2030
Total Ridership	77,514	78,289	79,072	79,863	80,662
Total Revenue Miles	230,635	232,941	235,271	237,624	240,002
Total Miles	312,883	316,011	319,172	322,365	325,590
Total Revenue Hours	23,546	23,781	24,019	24,260	24,502
Total Hours	31,464	31,779	32,096	32,417	32,742