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CURRENT RESEARCH AND DEVELOPMENT IN INTERCITY RAIL PASSENGER SYSTEMS

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TRB 84th Annual Meeting, January 9-13, 2005
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The Transportation Research Board's Committee on Intercity Rail Passenger Systems (AR010) is concerned with research that will lead to better planning and implementation of intercity rail passenger systems, with particular emphasis on the full range of high-speed systems, including new technology. Research will include demand analysis, financial considerations, economic effects (including consideration of user and social benefits), and public-private partnerships and should address impacts on other rail operations and the environment, coordination with other modes, rail-highway interfaces, corridor versus system concerns, technology assessment, and implementation strategies.

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LETTER FROM THE EDITOR

Dear Readers:

The fall 2004 newsletter presents a one-two-three punch, in that a single topic is covered in two articles representing three cooperating rail agencies. The topic of interagency cooperation is critically important at this time of rethinking institutional arrangements and managing scarce resources for rail passenger systems in the United States.

California has taken a proactive approach to establishing, supporting, and operating a statewide network of rail and transit services. While maintaining the main arrangements with Amtrak, the Golden State also cooperates with regional rail transit providers in all of its major metropolitan areas. In Southern California, the Surfliner corridor represents the second most traveled intercity rail corridor in the nation. How the regional and statewide services interact to provide the most seamless and attractive transportation services to residents is worthy of close examination.

The editor wishes to thank committee member Warren Weber of the California Department of Transportation's (Caltrans) Division of Rail for his support of this newsletter topic, as well as Eric Schatmeier of Caltrans who was the primary author of the first article. In the spirit of the Rail 2 Rail program, Francisco Oaxaca of the Southern California Regional Rail Authority contributed additional Metrolink insights and incorporated them into that article. The second article is the outcome of a further collaboration at the North San Diego County Transit Development Board, now an agency of the San Diego Association of Governments, between board member Judy Ritter and Tom Kelleher of the agency's operating staff.

We hope you find these two articles to be of interest and value. Please note the details on page 9 on how you also can submit contributions to future issues of the committee newsletter. Thank you.

*Sincerely,
Al Witzig, Editor*

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RAIL 2 RAIL PROGRAM BRINGS BENEFITS TO AMTRAK AND METROLINK RAIL CORRIDORS

In Southern California where conventional wisdom once held that motorists could never be lured from behind the wheels of their automobiles onto public transportation, the behavior of the region's travelers recently has been unconventional.

Fostered by a new program of coordination between intercity and commuter trains called "Rail 2 Rail," ridership on the area's various publicly funded passenger train services is at record levels and growing. For the first time last year, more than 2 million passengers rode Amtrak's Pacific Surfliner between San Diego, Los Angeles, Santa Barbara, and San Luis Obispo. The Southern California Regional Rail Authority's Metrolink trains, whose web of commuter lines radiate from Los Angeles to distant suburbs, carried more than 9 million passengers in 2003. And the North San Diego County Transit District's (NCTD) "Coaster" trains, operating between Oceanside and San Diego, added another 1.2 million annual riders to the passenger rail's SoCal mode share. These statistics have been achieved despite recent international and economic uncertainties that have depressed many other travel markets.

With the financial support of the state of California, Amtrak pioneered incremental expansion of passenger rail service in the southern region, proving early in the history of the "San Diegans" (as the Surfliners were then known and as the trains were named pre-Amtrak by the former Santa Fe) that customers would respond favorably to increases in frequency and to capital improvements to tracks and stations. Higher frequency spawned a commuter market, which was more efficiently served by separately managed trains, owned and operated by local authorities. Metrolink and Coaster were formed to serve this market, in some cases operating trains over the same tracks and using the same stations as their Amtrak predecessor.

Despite the shared facilities, the three systems sought to establish separate and distinct market niches. Amtrak tried to attract longer-distance passengers making recreational and occasional business trips. New passenger cars on the Surfliner included on-board amenities such as wide, reclining seats, on-board food and beverage service, and premium "Pacific Business Class" service—offering a reserved seat, newspapers, and snack foods at an additional charge.

By contrast, Metrolink and Coaster equipment is relatively spartan, similar to most U.S. commuter rail equipment. Seating is fixed and less spacious than an intercity train, and amenities are few. The expectation is that the market for these trains is only short rides to and from work. Fares are lower and designed for the frequent rider, and stations are more closely spaced than intercity stations and unstaffed. Tickets are purchased by

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mail or by machine, and typical riders drive to a station parking lot where they leave their cars for the workday. Each of the three Southern California systems had tailored its services to meet market needs and succeeded at their individual tasks.

Although market research showed a high degree of customer satisfaction with this niche approach, higher levels of service created additional demand. Amtrak and Caltrans incrementally expanded the frequency of services in both south and north areas of Los Angeles. The two commuter operators added limited weekend and late-night service on some lines.

The distinctions between the services became blurred well before Rail 2 Rail. Commuter desires for Amtrak-style amenities led to the creation of a “step-up” program, in which Metrolink riders on the Ventura and Orange County lines (those utilizing the same tracks as Surfliner trains) could ride Amtrak trains within the limits of their Metrolink monthly tickets by purchasing a book of coupons. While Amtrak sold monthly and other multiride tickets to its regular riders, the commuter operators began marketing excursion packages to beaches and ball games. The result was that local managers of Caltrans and Amtrak began to explore how they could coordinate with one another to their mutual benefit without abandoning their core businesses. From this cooperative sentiment, Rail 2 Rail was born.

Rail 2 Rail is an umbrella title for a set of programs designed to use shared resources more efficiently. It includes joint information materials, joint advertising, and the first phase of a cooperative joint fare program, which has achieved dramatic success. The fare program began in September 2002 with Amtrak, Caltrans, and Metrolink agreeing to eliminate “step-up” coupons and to allow Metrolink monthly passes to be honored at no additional cost to passengers on all Surfliner trains within the origin and destination limits of their ticket. Metrolink riders had reduced the cost for access to eight additional weekday trains north of Los Angeles and 22 more trains south. Weekend and holiday Surfliners were also included in the deal. Because of this new found flexibility, the program was an immediate success. In the last month before the end of the “step-up” program, 2,000 Metrolink riders rode Amtrak trains in the corridor. In the first month of Rail 2 Rail, this number rose to 10,000. In April 2004, 31,000 Metrolink riders rode the Surfliner. In the holiday month of November 2004, this number remained well over 25,000.

The agreement between Amtrak, Caltrans, and Metrolink provides for per-passenger reimbursement from the local to the intercity operator, with an annual cap on total reimbursement. This cap was reached in six months of the first year of operation and has been adjusted upward in the two succeeding years. The cost of reimbursement, however, has been partially compensated by an increase in Metrolink monthly ticket sales, precipitated by the attractiveness of the ticket and additional capacity. The Orange County Transportation Authority subsidizes the operation of

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Metrolink service in Orange County and is providing additional funding to reimburse Amtrak for Metrolink passengers using Pacific Surfliner trains.

Using joint marketing funds, the parties have provided various customer premiums and promotions for monthly tickets. The most successful promotion allowed Metrolink monthly pass holders to ride free on Surf-liners during weekends to Santa Barbara and San Luis Obispo, which is well beyond Metrolink territory. The expectation between Amtrak and Caltrans was that commuters would travel on their weekend excursions with friends and family members who would pay full fares, thus generating incremental revenue. Metrolink offered it as one more inducement to monthly pass purchase. Recently, the partners launched promotions encouraging Metrolink monthly pass holders to upgrade to Amtrak's "Pacific Business Class," a premium service available on all Surfliner trains. This promotion gives Metrolink riders an option for reserved seating previously unavailable to them, while creating more capacity in coach and additional revenue to Amtrak and Caltrans.

In the spring of 2004, the NCTD Board of Directors voted unanimously to negotiate a Rail 2 Rail fare agreement of its own with Amtrak and Caltrans. The program works the same way as the Metrolink system for customers. Coaster monthly ticket holders now can ride on any train, regardless which system operates it. This flexibility doubles weekday frequency and quadruples it for Saturday service. Access is now also available for the first time to the 12 Sunday Amtrak trains.

Although the Coaster system only shares three stations in common with Amtrak between San Diego and the northern point of the system in Oceanside, 2,400 Coaster customers rode Amtrak trains in the corridor during the first month of the program, April 2004. With a week to go in May, this figure already rose to 3,100. The program, started as a six-month experiment, was renewed for another year by NCTD because of its early success (see article on page 7).

A less measurable benefit of Rail 2 Rail is the spirit of cooperation it has launched between commuter and intercity operators. The parties to both agreements have issued joint timetables and signage promoting the programs. At Metrolink stations, new ticket vending machines are being installed that will sell Amtrak 10-trip tickets, which can be validated and used on either Amtrak or Metrolink trains. Passengers will be able to buy tickets on either commuter or intercity trains or make trips requiring use of both systems by mid 2005. For the first time, the systems can market trips with Metrolink origins and Amtrak destinations or vice versa.

In addition, Amtrak and Caltrans are partnering with Metrolink to permit two Amtrak northbound Surfliner trains between San Diego and Los Angeles to make stops at Metrolink's Norwalk and Laguna Niguel-Mission Viejo stations and permit one of Amtrak's southbound Pacific Surfliner trains to stop at Metrolink's Orange Station.

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Amtrak and Caltrans also are implementing a second, daily round-trip train between Los Angeles and San Luis Obispo, which will assume a morning outbound schedule slot currently occupied by Metrolink and stop at Metrolink stations in Burbank and Northridge. The train will honor all Metrolink tickets between these points. The approach will save Metrolink an equipment set and train operating costs and allow Amtrak and Caltrans to serve the most desirable demand-model-tested intercity rail time slot.

Finally, Metrolink and Amtrak have implemented common fares between Bob Hope Burbank Airport and Los Angeles Union Passenger Terminal and have made all tickets interchangeable between these two points. They are exploring other station pairs where this kind of common ticketing makes sense.

None of the partners in the Rail 2 Rail experiment have forgotten their primary mission. Intercity and commuter trains still serve different purposes. Rail 2 Rail, however, recognizes that the needs of customers are the most important aspect of each mission and that these needs can be addressed in many innovative ways. Rail 2 Rail sets up a three-way “WIN-WIN-WIN” partnership, where passengers, Amtrak and Caltrans, and regional commuter rail operators all share in better transportation services.

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SAN DIEGO COUNTY TESTS RAIL 2 RAIL AND FINDS STRONG PASSENGER ACCEPTANCE

Amtrak, Coaster, and the California Department of Transportation Rail Services Division joined forces in April 2004 to introduce the Rail 2 Rail program to rail passengers in the San Diego area. The North County Transit District (NCTD) Board of Directors, which operates the Coaster train system, approved the program for a trial period of six months to end in September 2004.

NCTD modeled the San Diego Rail 2 Rail program after the Metrolink–Amtrak program established in 2002. Applying many of the marketing techniques set up by Metrolink–Amtrak, the San Diego partners jointly marketed the program to existing rail passengers in the corridor, with special attention paid to the three stations where Coaster and Amtrak trains jointly operate: Oceanside, Solana Beach, and Santa Fe in San Diego.

From the inception of the program, Coaster monthly pass holders took advantage of traveling on either Amtrak Pacific Surfliner or Coaster trains between San Diego and Oceanside Transit Center. Far fewer Amtrak ticket holders chose to use the Coaster between the two cities, because of the higher ticket prices for Amtrak rather than Coaster.

Between April, May, and June of 2004, interest in Rail 2 Rail increased. Ridership climbed from 2,513, 4,716, to 5,388 passengers, respectively, and stayed strong all summer and through September, when 5,441 passengers took advantage of the service. The Coaster operated 24 daily trains for weekday service during the six-month trial, while Amtrak offered up to an additional 20 trains each weekday. Amtrak also offered more trains on Saturday and Sunday than Coaster, which operated eight trains on Saturday and none on Sunday.

Coaster passenger loads proved very high during the inaugural summer for Rail 2 Rail. An important factor was Petco Park, the new downtown stadium of the San Diego Padres. NCTD added additional late-night return trains between April and September to serve the ballpark. Thanks to the extra trains, Coaster averaged 10 percent more riders on Padres game days, compared to nongame days. The end result of offering new Padres service and Rail 2 Rail was a record-breaking summer for the Coaster. During each month from April to September, Coaster recorded a new monthly peak in ridership. The record breaking numbers were achieved without counting the roughly 5,000-plus Coaster monthly pass holders who were riding Amtrak trains and utilizing the Rail 2 Rail program during the period.

Rail 2 Rail was developed to offer commuters broader travel options through increased connectivity and acceptance of tickets between participating transportation providers. With Coaster trains carrying more than 1.4 million passengers in 2004—its third consecutive record-breaking year—NCTD’s Board of Directors decided in late summer to extend the

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Rail 2 Rail program through the remainder of the fiscal year, June 2005.

In the months ahead, NCTD will work with the other partners in Rail 2 Rail and discuss specifics of the program to consider making it a permanent part of Coaster–Amtrak service. Based on the limited data gleaned from the summer of 2004, Rail 2 Rail seems to have an excellent chance of becoming a fixture in the San Diego rail passenger corridor.

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Amtrak California
<http://www.amtrakcalifornia.com>

North San Diego County Transit District
<http://www.gonctd.com>

Southern California Regional Rail Authority
<http://www.metrolinktrains.com>

American Public Transportation Association
<http://www.apta.com/>

TRB Calendar
<http://www.TRB.org/calendar/>

NEWSLETTER COMMENTS

Comments on this newsletter and, most especially, continued contributions by committee members, friends of the committee, and others can be sent to the editor:

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