



LOSSAN RAIL CORRIDOR AGENCY BUSINESS PLAN

FY 2016-17 – FY 2017-18

Prepared for California State Transportation Agency
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EXECUTIVE SUMMARY

The Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency (Agency) is a joint powers authority (JPA) formed in 1989 that works to increase ridership, revenue, capacity, reliability, coordination, and safety on the rail corridor between San Diego, Los Angeles, and San Luis Obispo. On September 29, 2012, Governor Jerry Brown signed SB 1225 (Chapter 802, Statutes of 2012), which authorizes the LOSSAN Agency to oversee the state-supported Pacific Surfliner intercity passenger rail service operating on the LOSSAN rail corridor, subject to approval of an interagency transfer agreement (ITA) with the State of California, which was signed and took effect on July 1, 2015.

The Pacific Surfliner service travels along a 351-mile coastal rail corridor through six counties: San Diego, Orange, Los Angeles, Ventura, Santa Barbara, and San Luis Obispo, and is currently the second busiest intercity passenger rail corridor in the United States, and the busiest state-supported Amtrak route. The LOSSAN Agency is governed by a Board of Directors (Board) composed of 11 voting members representing rail owners, operators, and planning agencies along the LOSSAN rail corridor, as well as four non-voting, ex-officio members, as detailed below.

Member Agencies

- San Diego Metropolitan Transit System
- San Diego Association of Governments
- North County Transit District (NCTD)
- Orange County Transportation Authority (OCTA)
- Riverside County Transportation Commission
- Los Angeles County Metropolitan Transportation Authority
- Ventura County Transportation Commission
- Santa Barbara County Association of Governments
- San Luis Obispo Council of Governments

Ex-Officio Members

- Amtrak
- California Department of Transportation (Caltrans) Division of Rail and Mass Transportation (DRMT)
- California High-Speed Rail Authority
- Southern California Association of Governments

As required by SB 1225, and per the terms of the ITA, the LOSSAN Agency must submit an annual business plan by April 1 of each year to the Secretary of the California State Transportation Agency (CalSTA). The primary purpose of this business plan is to identify the major LOSSAN Agency goals, objectives, and the necessary budget for management of the Pacific Surfliner service. It summarizes operations, service levels, budget, and capital improvements that have contributed to the success of the Pacific Surfliner service and identifies improvements to sustain and grow its success moving forward.

Historical Performance of Pacific Surfliner Service

Since 1971, service on the Pacific Surfliner between Los Angeles and San Diego has increased from the original six daily trips to the current level of 23 daily trips.

The Pacific Surfliner is the busiest state-supported route in the entire Amtrak national system carrying 2.8 million passengers in federal fiscal year (FFY) 2014-15. While Pacific Surfliner ridership and revenue have been increasing over time, there has been no additional service added for more than a decade (since 2004).

The state subsidy for Pacific Surfliner service has risen from \$36.819 million in FY 2013-14 to \$44.287 million in FY 2014-15 and an estimated \$46.581 million in FY 2015-16 in part due to the increased costs absorbed by the state per the provisions of Passenger Rail Investment and Improvement Act of 2008 (PRIIA) Section 209, which eliminated Amtrak's 30 percent share of Pacific Surfliner operating costs and passed on additional capital equipment charges for use of Amtrak-owned equipment that the state had not previously funded. Operating costs for the Pacific Surfliner service are now covered 100 percent by the state, with funding for operations of all three intercity rail corridors provided through the Public Transportation Account, which is funded primarily through the state sales tax on diesel fuel.



Los Angeles, San Diego, Irvine, Solana Beach, and Oceanside are the busiest stations of the Pacific Surfliner route. Over the last decade, the Pacific Surfliner has consistently maintained a farebox recovery ratio of more than 50 percent, reaching 70.5 percent in FY 2014-15.

Operating Plan and Strategies

Amtrak operates 23 one-way Pacific Surfliner trips each day, with 11 roundtrips between San Diego and Los Angeles, and one daily trip (761/1761) originating in Los Angeles and traveling north to Santa Barbara and San Luis Obispo. Of those, five daily roundtrips (the 700-series trains) extend north of Los Angeles to serve Santa Barbara and Goleta, with two of those roundtrips extending further north to serve San Luis Obispo.

The Pacific Surfliner services 31 stations, 17 of which are between San Luis Obispo and Los Angeles, with the remaining 14 located south of Los Angeles in Orange and San Diego counties. In addition, six daily Pacific Surfliner trains currently stop at four additional COASTER stations under the Rail 2 Rail Program with NCTD. The Pacific Surfliner rail service is supplemented by Amtrak's network of Thruway buses that connect passengers throughout the LOSSAN rail corridor and beyond. In FY 2014-15, approximately 5 percent of Pacific Surfliner riders made a portion of their journey on an Amtrak Thruway bus.

In FY 2016-17 and FY 2017-18, the LOSSAN Agency plans to work with Caltrans DRMT to ensure sufficient state funding is provided to operate the existing level of Pacific Surfliner and Amtrak Thruway bus service on the LOSSAN rail corridor, while also exploring opportunities to enhance ridership and revenue, and add a 12th roundtrip between Los Angeles and San Diego. Initial operations planning indicates the new service could be accommodated on current infrastructure using existing railcars through more efficient equipment turns. Though final schedules are still under development, the new service would likely offer an earlier northbound train from San Diego to Los Angeles, allowing passengers to arrive in Los Angeles before 8 a.m., with a new southbound trip filling a gap in the schedule between the 7:30 p.m. and 10:10 p.m. departures from Los Angeles.

The LOSSAN Agency will work with Amtrak to implement Phase 1 of the "robust timetable" work conducted by SMA Consulting beginning in June 2016, which is intended to improve the overall reliability of Pacific Surfliner, Metrolink, and COASTER rail services. In addition, the LOSSAN Agency has been working to determine the feasibility of providing weekday peak-hour service between Ventura and Santa Barbara by rescheduling existing trains north of Los Angeles. This work will continue through the early part of FY 2016-17, with service implementation possible by fall 2016. The LOSSAN Agency is also working to identify additional equipment to supplement the existing Pacific Surfliner fleet in order to meet demand during peak travel periods, which can lead to standing room-only conditions.



During the next two FYs, the LOSSAN Agency also plans to implement a number of strategies to further improve Pacific Surfliner service. Areas for improvement include: train monitoring, train and connecting bus schedule adjustments, transit transfer programs and onboard connecting transit pass sales, equipment and crew utilization, response to service disruptions, and improved service planning. The LOSSAN Agency will also work with Amtrak to evaluate and pursue cost-effective opportunities to increase ridership and revenue through special event service.

Performance Standards and Metrics

As required by the SB 1225, CalSTA has established a set of uniform performance standards (UPS) for the three state-supported intercity passenger rail corridors, including the Pacific Surfliner service, to control cost and improve efficiency. The proposed performance measures fall into three major categories (usage, cost efficiency, and service quality) and include: passenger miles, ridership, farebox recovery, cost per passenger mile, endpoint on-time performance, all-stations on-time performance, and operator responsible delays per 10,000 train miles.

In FY 2014-15, the Pacific Surfliner service saw positive growth, with a 5.8 percent increase in ridership, a 6.3 percent increase in passenger miles, and a 5.1 percent increase in farebox recovery. Endpoint on-time performance continued to lag behind the goal of 90 percent, reaching 77.9 percent in FY 2014-15.

Capital Improvements

Though much progress has been made over the years, many segments of the LOSSAN rail corridor are still limited by the lack of passing or second main tracks. There is currently more than \$5 billion in capital needs that have been identified on various portions of the LOSSAN rail corridor, including additional track capacity, station improvements, and signal and communications improvements.

In addition to the major capital improvements planned for the corridor, the state annually allocates approximately \$500,000 to cover minor projects, such as station improvements, signage, and minor safety enhancements, and the California Office of Emergency Services makes approximately \$1.9 million per year available for safety and security projects. The LOSSAN Agency will work with member agencies to prepare a prioritized list of candidate projects for the state-funded minor projects program, and also seek joint capital funding opportunities through the Transit and Intercity Rail Capital Program and other grant programs.

Fare Policy

Pacific Surfliner trains currently offer travel in unreserved coach class and reserved business class. Fares are largely static year-round with the exception of slight increases on select holidays during peak travel periods. Amtrak also offers discounted multi-ride tickets, discounts for group travel, as well as a Rail 2 Rail Program that allows Metrolink and COASTER commuter rail pass holders to ride Pacific Surfliner trains at no additional cost, subject to

certain restrictions. The last fare increase on the Pacific Surfliner service took place in June 2013.

The LOSSAN Agency will work with Amtrak and the state to develop a fare policy that ensures the Pacific Surfliner service is an attractive transportation option that is competitive with the automobile and other competing modes of transportation, while meeting the UPS set by the state, including ridership, revenue, and farebox recovery goals.

The LOSSAN Agency will also explore a variety of other opportunities to increase fare revenue without raising fares, while maintaining and expanding ridership, including transit transfers, partnerships with major destinations/attractions, enhanced loyalty programs, and revised discount programs and multi-ride pricing structures.

Network Integration and High-Speed Rail

The Pacific Surfliner will play a key role in the larger statewide effort of integrating the three state-supported intercity passenger rail services with the high-speed rail (HSR) system. The LOSSAN Agency is an active participant in CalSTA’s Network Integration Strategic Service Plan for the California Passenger Rail Network. State-supported intercity passenger rail and the HSR system will also be connected with transit and commuter rail systems throughout the state as the Pacific Surfliner service currently integrates with these systems.

The passenger rail services along the LOSSAN rail corridor act as a backbone for transportation throughout the California coastal region. As such, the LOSSAN rail corridor will provide critical connections and feeder/distributor service to support and compliment the HSR system. Integration between the LOSSAN rail corridor and HSR system will provide mutual benefits to each service and must be planned carefully to build upon the existing success of the Pacific Surfliner service.

Passenger Amenities

The Pacific Surfliner offers its passengers amenities to improve the overall travel experience. The LOSSAN Agency will carry out a number of strategies for enhancing passenger amenities. Key priorities for FY 2016-17 and FY 2017-18 include enhancements to both on-board and station amenities, including bicycle storage, business class service, food and beverage offerings, joint promotions, newsletter, on-board information system, on-board transit pass sales, Rail 2 Rail Program, service disruption response, special event service, train status information, transit connectivity, Wi-Fi service and landing page, checked baggage and station improvements.



Equipment

The Pacific Surfliner fleet consists of nine train sets, to operate 23 daily trains. Of the 49 bi-level

cars that are dedicated to the Pacific Surfliner service, ten are owned by Caltrans DRMT, and the remaining 39 are owned by Amtrak.

Caltrans DRMT has 28 new railcars and 15 new locomotives on order for the Pacific Surfliner service, expected to arrive beginning in late 2018. The LOSSAN Agency has initiated conversations with Amtrak and Caltrans DRMT regarding options to lease additional equipment on a short-term basis prior to the arrival of the new state-owned equipment in order to accommodate peak travel demand, which has led to standee conditions on some trains.

Marketing

The Pacific Surfliner offers views of some of California’s most beautiful coastline, and serves destinations that attract tourists from all over the world. Given its scenic route and popular stations served, the Pacific Surfliner has the potential to be even more widely used than it is today. The LOSSAN Agency initiated a number of successful marketing initiatives in FY 2015-16, including a winter marketing campaign that included the development of a series of destination-based videos, new Pacific Surfliner social media channels, and a new pacificsurfliner.com website.

The proposed marketing program for FY 2016-17 builds on the success of the marketing activities initiated in FY 2015-16 to target individual markets using a “4P” approach (product, pricing, promotion, and place). In addition to attracting new customers, the marketing program will target existing customers to increase loyalty, frequency of use, and word of mouth advertising. The marketing program goals include increasing awareness of the Pacific Surfliner service by 10 percent among people who live within a 15-mile radius of a Pacific Surfliner station; increasing frequency of usage among current riders by 5 percent, and increasing annual ridership and revenue by 2 percent.

Marketing tactics will include traditional and digital advertising, as well as video, social media, e-mail blasts, and a state-of-the-art, customer-oriented Web site. All marketing activities and expenditures will be measured to determine efficiency and effectiveness.

Annual Funding and Separation of Funding

The primary purpose of the business plan is to fulfill the requirement by SB 1225 to develop a two-year business plan on an annual basis to guide the allocation of funds necessary for the LOSSAN Agency to administer, operate, maintain equipment, and market the Pacific Surfliner service.

The current assumptions for the FFY 2016-17 operating budget include the addition of a 12th daily roundtrip between Los Angeles and San Diego. The budget also includes a modest



increase in both ridership and revenue of 2 percent over the FFY 2015-16 budget. Total operating costs for the Pacific Surfliner service are projected to be \$118,404,876, an increase of approximately 6 percent over the FFY 2015-16 budget. Caltrans DRMT has executed an agreement with Amtrak to directly fund equipment capital charges for the Amtrak-owned railcars and locomotives used on the three state-supported rail corridors, effective October 2015. As a result, equipment capital charges are not included in the operating agreement between Amtrak and the LOSSAN Agency.

After subtracting projected fare revenue of \$78,835,800, the total FFY 2016-17 state operating subsidy payment is projected to be \$39,569,076. This is a significant decrease from the FY 2015-16 budgeted operating subsidy of \$46,581,156, mainly due to the state directly funding equipment capital charges. The FY 2016-17 budget also includes \$500,000 for minor projects, including station improvements, signage, and minor safety and security enhancements, as well as \$300,000 to replace outdated Amtrak Quik-Trak machines.

In addition to the operating payment to Amtrak, the state will also fund the administration and marketing of the Pacific Surfliner service. The LOSSAN Agency’s proposed budget for the administrative and marketing functions is \$5.223 million in FY 2016-17. Adjustments have been made from the prior business plan estimates to account for actual cost of staffing, legal services, and insurance. The administration and staffing line item has been adjusted to account for the actual cost of hired positions and a request for a part-time college intern.

Additional funding has been requested in the contracted services line item to allow for a comprehensive and integrated update of the LOSSAN Strategic Plan, and there is a request for other business expenses, which include banking fees and Board meeting lunches for \$7,800, which is offset by interest revenue of \$3,500.

To ensure state funding is kept separate from the funding for OCTA’s projects and programs, the LOSSAN Agency has outlined strategies for this separation of funding within the LOSSAN Agency.



Government Relations and Advocacy

One of the key benefits of local governance of the Pacific Surfliner service is the added flexibility in advocating for policies at the state, federal, and local levels to improve rail operations and secure funding for capital needs. The LOSSAN Agency will continue regular annual advocacy trips to Sacramento and Washington, D.C., and will consider retaining state and federal advocacy services using local funds.

The annual adoption of a legislative program by the LOSSAN Board provides overall guidance to

LOSSAN Agency advocacy activities. The 2016 LOSSAN Legislative Program provides further detail on the LOSSAN Agency’s legislative priorities, including:

- Identify and secure long-term and sustainable funding sources to support passenger rail operations and capital projects in the LOSSAN rail corridor, including securing federal funds made available by the reauthorization of a federal rail title and ensuring the eligibility for the LOSSAN Agency to compete for funding under the state’s cap-and-trade and other programs
- Support efforts to further enhance connectivity of regional rail and local transit services within the LOSSAN rail corridor
- Continue to study and advance infrastructure and service improvement projects and programs

At the local level, LOSSAN Agency staff will continue to work with LOSSAN member agencies, local communities, and stakeholder organizations to build awareness of passenger rail services along the LOSSAN rail corridor, developing strategic partnerships to better evolve the services to meet local demands. Regular communications and outreach on service improvements and priority projects along the LOSSAN rail corridor, and improved marketing campaigns, will foster a better understanding of issues faced along the LOSSAN rail corridor. Increased awareness of these services by local officials can then be leveraged to back consensus based operational improvements and policy activities.

Safety and Security

Protecting the safety and security of passenger rail service is key to attracting and retaining riders, and ensuring efficient operation of passenger trains on the LOSSAN rail corridor. The goal of the



LOSSAN Agency safety program is to instill a comprehensive safety culture that will govern all of the activities associated with the operations and maintenance of the service, while efficiently meeting operational performance goals. The Federal Railroad Administration (FRA) and the California Public Utilities Commission (CPUC) are responsible for overseeing general railroad safety along the LOSSAN rail corridor.

The LOSSAN Agency will primarily serve in an oversight and coordination role with regard to safety and security aboard trains, relying on the extensive on-board safety and security programs and policies already put in place by Amtrak.

LOSSAN Agency staff will also attend regularly scheduled safety meetings hosted by Amtrak for front-line employees, to reiterate that safety is the first priority in delivering Pacific Surfliner service. Amtrak is responsible for all required reporting of safety data to federal, state, and local agencies, including FRA and CPUC.

All cab cars and locomotives are equipped with a “forward facing” camera system to aid in accident investigation and soon may be equipped with “inward facing” cameras. New bi-level rail cars that will be put into service beginning in late 2018 will feature crash energy management technology. As required by the FRA, installation of Positive Train Control (PTC) is progressing, with all Pacific Surfliner locomotives and cab cars expected to be fully compliant with PTC by the revised December 31, 2018 federal deadline.

The LOSSAN Agency will work with right-of-way owners and rail operators to enhance safety and response to incidents along the right-of-way. Public information efforts will include both traditional and social media to build awareness of rail safety. The LOSSAN Agency will work with Amtrak to enhance current communications strategies to alert passengers of service issues.



Emerging Corridors

In addition to administering the existing Pacific Surfliner rail service, the LOSSAN Agency will continue to work with member agencies to study and pursue expansion opportunities on emerging corridors that provide connectivity within Southern California and beyond. Specifically, the LOSSAN Agency expects to focus on connectivity to the California HSR system, as well as the eastern communities throughout Riverside County and Coachella Valley, and coastal communities up to San Luis Obispo and north to the San Francisco Bay Area. These connections will provide seamless travel opportunities by rail or bus throughout the region and state. Enhanced and emerging corridor rail service and system improvements will contribute to the success of the LOSSAN rail corridor, support future statewide HSR service and regional commuter rail operations, and provide connectivity with local transit systems.

Chapter 1: Introduction

This business plan identifies the Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency’s (Agency) budget and major goals and objectives for fiscal year (FY) 2016-17 and FY 2017-18 in its management of the Pacific Surfliner intercity passenger rail service. SB 1225 (Chapter 802, Statutes of 2012), approved in September 2012, authorized the LOSSAN Agency to assume responsibility for managing the state-supported Pacific Surfliner service, subject to negotiation of an interagency transfer agreement (ITA) with the state, which was approved and took effect on July 1, 2015.

Overview of the LOSSAN Rail Corridor

The Pacific Surfliner service operates over the 351-mile LOSSAN rail corridor through six counties in Southern California (San Diego, Orange, Los Angeles, Ventura, Santa Barbara, and San Luis Obispo). It is the second-busiest Amtrak rail corridor in the nation, topped only by the Northeast Corridor between Boston, New York, and Washington, D.C. The LOSSAN rail corridor is made up of seven different right-of-way (ROW) owners, including both public agencies and freight railroads (See Table 1.1 and Figure 1.1), and is used by five different passenger rail and freight operators (Amtrak, COASTER, Metrolink, BNSF Railway, and Union Pacific Railroad).

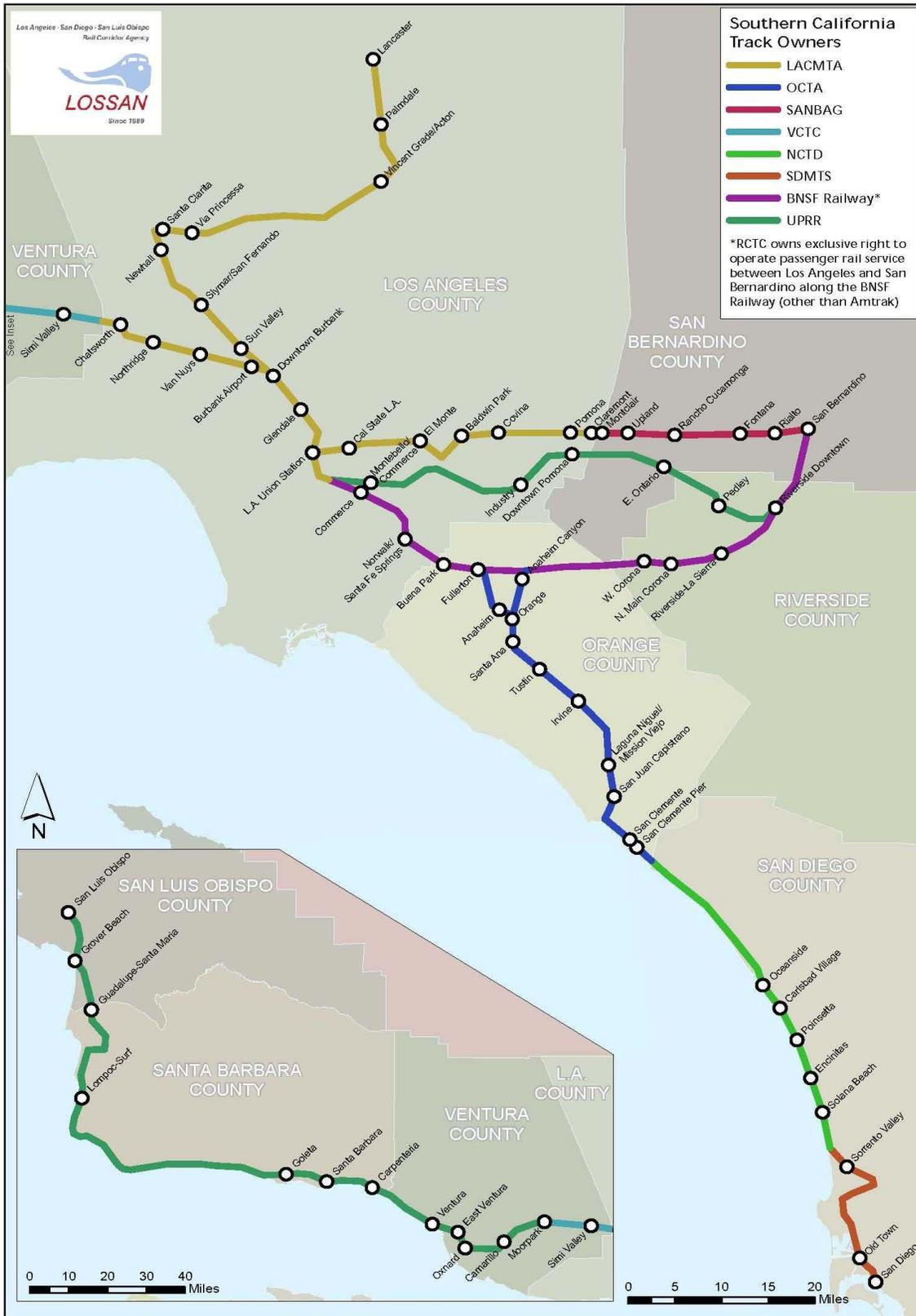
Table 1.1: LOSSAN Rail Corridor ROW Owners

Owner	Route Miles
San Diego Metropolitan Transit System (SDMTS)	22
North County Transit District (NCTD)	38
Orange County Transportation Authority (OCTA)	42
BNSF Railway	21
Los Angeles County Metropolitan Transportation Authority (Metro)	36
Ventura County Transportation Commission (VCTC)	16
Union Pacific Railroad	176
Total	351

Overview of the LOSSAN Agency

The LOSSAN Agency is a joint powers authority (JPA) originally formed in 1989 for the primary purpose of improving passenger rail service along the LOSSAN rail corridor. It strives to increase ridership, revenue, capacity, reliability, coordination, and safety on the rail line between San Diego, Los Angeles, and San Luis Obispo. The LOSSAN Agency is governed by an 11-member Board of Directors (Board) composed of officials representing rail owners, operators, and planning agencies along the LOSSAN rail corridor. OCTA was selected as the managing agency of the LOSSAN Agency in November 2013. As the managing agency, OCTA provides all management and administrative support for the LOSSAN Agency.

Figure 1.1: LOSSAN Rail Corridor ROW Owners



The LOSSAN Board includes representatives from nine member agencies (Metro, NCTD, OCTA, Riverside County Transportation Commission (RCTC), San Diego Association of Governments (SANDAG), SDMTS, San Luis Obispo Council of Governments (SLOCOG), Santa Barbara County Association of Governments (SBCAG), and VCTC). Amtrak, the California Department of Transportation (Caltrans) Division of Rail and Mass Transportation (DRMT), the California High-Speed Rail Authority (CHSRA), and the Southern California Association of Governments (SCAG) are non-voting, ex-officio members of the LOSSAN Board.

An ITA between the LOSSAN Agency and the state was signed on June 29, 2015, transferring responsibility for the administration of the Pacific Surfliner service from Caltrans DRMT to the LOSSAN Agency, effective July 1, 2015.

As required by SB 1225, and per the terms of the ITA, the LOSSAN Agency must submit an annual business plan by April 1 of each year to the Secretary of the California State Transportation Agency (CalSTA). The LOSSAN Agency business plan must be reviewed and approved by the Secretary and is used to develop an annual appropriation request to the state legislature. As required by SB 1225, the LOSSAN Agency business plan is consistent with the 2013 State Rail Plan developed by Caltrans DRMT, the CHSRA 2014 Business Plan adopted by the CHSRA Board in April 2014, and the CHSRA Draft 2016 Business Plan released in February 2016.

SB 1225 requires the LOSSAN Agency to maintain the existing Pacific Surfliner service and facilities, and to implement service expansions as warranted by ridership demand and available revenue. Under the provisions of SB 1225, the state will continue to provide the funding necessary for service operations, administration, and marketing of the Pacific Surfliner trains to maintain at least existing service levels. Caltrans DRMT also remains responsible for the development of the California State Rail Plan, and the coordination and integration between the three state-supported intercity passenger rail services, as outlined in the ITA.

Agency Roles and Responsibilities

The list below provides a summary of the agencies involved in providing passenger rail service along the LOSSAN rail corridor, and those that the LOSSAN Agency will continue to coordinate with in managing the Pacific Surfliner service.

LOSSAN Agency: JPA legislatively permitted to assume administrative and oversight responsibility of the state-supported Pacific Surfliner intercity passenger rail service on the LOSSAN rail corridor effective July 1, 2015.

LOSSAN Member Agencies: The nine voting LOSSAN member agencies that previously provided financial support to the LOSSAN Agency prior to and through the Start-Up Term. The member agencies are key partners that provide important technical and policy input at both the Technical Advisory Committee (TAC) and Board level.

CalSTA: State office responsible for the funding and oversight of California's three intercity rail corridors, as well as CHSRA.

Caltrans DRMT: This department within Caltrans that is responsible for development of the State Rail Plan, oversight of state-owned rail equipment, and overall funding and coordination of the three state-supported intercity rail corridors.

Amtrak: The contracted operator of the state-supported Pacific Surfliner service and owner of the majority of the rail cars, and all locomotives, utilized in providing Pacific Surfliner service.

Capitol Corridor JPA (CCJPA): Responsible for the operations and oversight of the Capitol Corridor passenger rail service between San Jose, Oakland, Sacramento, and Auburn. It was the first non-state agency to assume responsibility and oversight for state-supported passenger rail service in California in 1998.

San Joaquin JPA (SJJPA): Administers the state-supported San Joaquin intercity passenger rail service between Bakersfield, Stockton, Oakland, and Sacramento. The San Joaquin Regional Rail Commission has been selected as the managing agency for this rail corridor to act on behalf of the SJJPA, similar to OCTA's role on behalf of the LOSSAN Agency.

OCTA: Selected by the LOSSAN Board as the LOSSAN managing agency during the Start-Up Term, and for an initial three-year term beginning after execution of the ITA.

In addition to the agencies listed above, there are a number of stakeholders who will be engaged with the LOSSAN Agency on an ongoing basis. These stakeholders include rail operators such as Metrolink, COASTER, and the freight railroads, as well as ROW owners along the rail corridor and the CHSRA. A list of those additional stakeholders is provided below:

Rail Operators

Southern California Regional Rail Authority (Metrolink)
NCTD
BNSF Railway
Union Pacific Railroad (UPRR)
Amtrak

ROW Owners

BNSF Railway
UPRR
NCTD
Metro
OCTA
VCTC
SDMTS

Regional Planning Agencies

SANDAG
SBCAG
SLOCOG
SCAG

Others Key Stakeholders/Partners

CHSRA

Coast Rail Coordinating Council

Coachella Valley Technical Advisory Committee

Federal Railroad Administration

Members of the California State Legislature

Members of the United States Congress

Pacific Surfliner station cities and local elected officials

Rail Passenger Association of California and other transit/rail advocacy groups

Current and prospective rail passengers

Chapter 2: Historical Performance of the Pacific Surfliner Service

Overview

California is home to three very successful state-supported intercity passenger rail routes operated by Amtrak that carry more than 5.6 million passengers each year: the Pacific Surfliner, Capitol Corridor, and the San Joaquin (See Figure 2.1). These three routes represent three of the five busiest rail services in the entire Amtrak national system: Pacific Surfliner at No. 2 with 2.8 million passengers per year, the Capitol Corridor at No. 3 with 1.5 million passengers per year, and the San Joaquin Corridor at No. 5 with 1.3 million passengers per year.¹ These three routes also rank first, second and fifth in ridership among state-supported Amtrak services. California's investment in intercity passenger rail service operations and capital projects over the past four decades has led the state to have the highest Amtrak ridership of any state in the country, with nearly one in five Amtrak passengers traveling in California.

¹ Amtrak Fact Sheet: FY 2015 – State of California

Figure 2.1: California Intercity Passenger Rail Routes

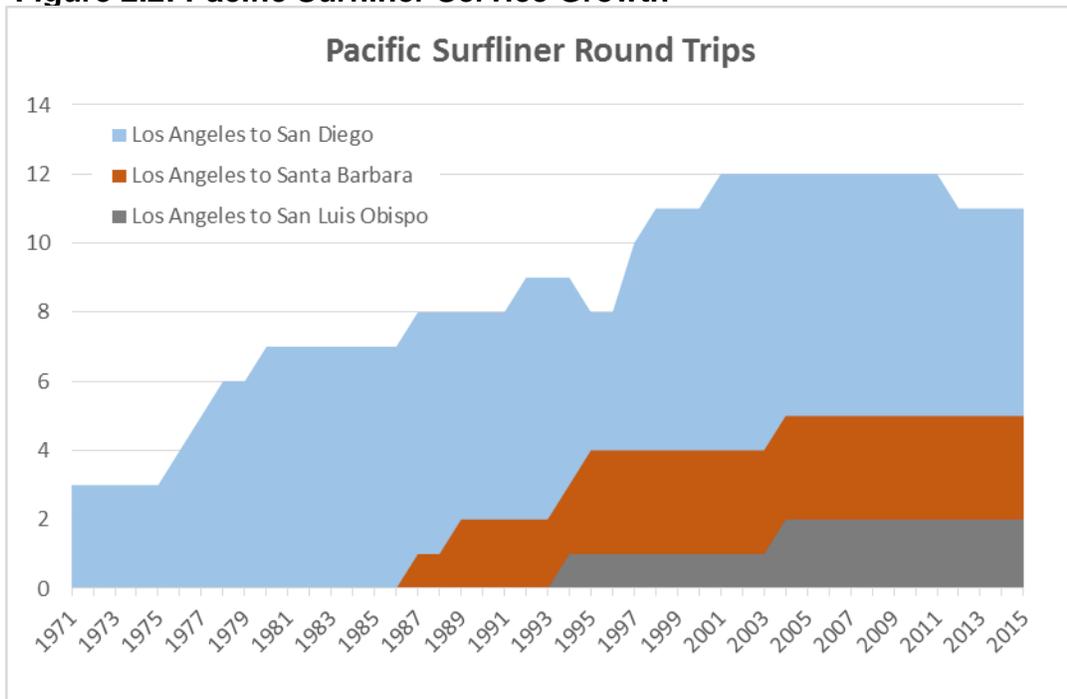


Source: Caltrans, 2015

History of Pacific Surfliner Service

In May 1971, Amtrak assumed operation of three daily San Diegan roundtrips between Los Angeles and San Diego that had previously been operated by the Atchison, Topeka & Santa Fe (AT&SF) railroad. Since 1971, service between Los Angeles and San Diego increased from the original six daily trips to the current 23 daily Pacific Surfliner trips, as detailed in Figure 2.2 and Table 2.4. Of the 23 daily Pacific Surfliner trains Amtrak currently operates between Los Angeles and San Diego, ten trains extend to Santa Barbara/Goleta and four to San Luis Obispo, including one daily trip that originates in Los Angeles and travels north to San Luis Obispo. Historical running time is presented in Table 2.1. The corridor is complimented by state-funded Amtrak Thruway buses, which provide scheduled connections to the Central Coast, Bay Area, Coachella Valley, and to the San Joaquin intercity rail corridor via Bakersfield. Two Amtrak long-distance trains (the Coast Starlight and Southwest Chief) also traverse portions of the LOSSAN rail corridor.

Figure 2.2: Pacific Surfliner Service Growth



Source: LOSSAN Agency, 2015

Table 2.1: Pacific Surfliner Historical Run Times

Decade	Los Angeles to San Diego Scheduled Time (Minutes)			Los Angeles to Santa Barbara Scheduled Time (Minutes)		
	Average	Longest	Shortest	Average	Longest	Shortest
1889	305.0	305.0	305.0			
1950s	159.8	187.5	150.0			
1970s	159.4	161.1	157.2			
1980s	163.6	168.5	154.8	148.8	160.0	137.5
1990s	168.7	185.2	157.5	159.9	170.9	152.7
2000s	165.2	180.9	157.2	163.0	184.7	149.5
2010s	166.1	181.2	153.1	162.9	181.8	151.0
2030*	155.0	160.0	143.0	139.6	154.0	128.0

*LOSSAN SIP 2030 Operations Modeling (2012)

Source: SANDAG, 2014 Historical Timetables

Pacific Surfliner Funding

The state subsidy for Pacific Surfliner service has risen from \$36.819 million in FY 2013-14 to \$44.287 million in FY 2014-15, and is projected to be \$46.581 million for FY 2015-16. These increases are in large part due to the increased costs absorbed by the state under the provisions of the Passenger Rail Investment and Improvement Act of 2008 (PRIIA) Section 209, federal legislation adopted in 2008 that eliminated Amtrak’s 30 percent financial contribution toward Pacific Surfliner operating costs and established additional capital equipment charges for the use of Amtrak-owned equipment that the state had not previously funded. State funding for operations of all three intercity rail corridors is provided through the Public Transportation Account, which is funded primarily through the state sales tax on diesel fuel.

Pacific Surfliner Service Characteristics

The Pacific Surfliner provides direct rail service to 31 stations. Six daily Pacific Surfliner trains currently make stops at COASTER stations in north San Diego County under the Rail 2 Rail program (Sorrento Valley, Encinitas, Carlsbad Poinsettia, and Carlsbad Village). Los Angeles, San Diego, Irvine, Solana Beach, and Oceanside are the top five busiest stations in the rail corridor according to average monthly ridership on the Pacific Surfliner service (See Table 2.2).

Table 2.2: Pacific Surfliner Ridership by Station for Federal FY (FFY) 2014-15

Station Ridership Report			
	Station	Passenger Ons/Offs	Growth vs. FFY 2013/14
1	Los Angeles	1,303,599	3.3%
2	San Diego	772,430	10.5%
3	Irvine	421,736	4.0%
4	Solana Beach	408,248	6.2%
5	Oceanside	385,128	-6.7%
6	Fullerton	344,513	9.7%
7	Santa Barbara	292,743	5.1%
8	Anaheim	270,819	6.6%
9	San Diego (Old Town)	238,288	21.1%
10	San Juan Capistrano	226,596	0.0%
11	Santa Ana	182,291	-1.6%
12	Oxnard	86,195	8.0%
13	Goleta	75,517	1.8%
14	Van Nuys	73,763	2.8%
15	Chatsworth	72,132	12.7%
16	San Luis Obispo	71,453	0.8%
17	Burbank	63,184	12.6%
18	Ventura	61,812	4.9%
19	Camarillo	51,831	12.4%
20	Glendale	51,009	4.9%
21	Simi Valley	45,666	9.9%
22	Carpinteria	29,461	2.9%
23	Moorpark	20,696	11.2%
24	Grover Beach	19,437	-0.5%
25	San Diego (Sorrento Valley)	16,523	69.5%
26	San Clemente	13,559	2.7%
27	Carlsbad (Village)	13,455	67.6%
28	Guadalupe	12,718	4.6%
29	Encinitas	11,945	67.0%
30	Carlsbad (Poinsettia)	9,363	56.7%
31	Lompoc/Surf	8,158	0.8%
<i>Total Passenger Ons/Offs</i>		5,654,268	5.4%
Total Ridership		2,827,134	

Source: Amtrak, 2015

The figures in Table 2.2 represent total boardings and alightings at each station for FFY 2014-15 (October 2014 to September 2015). Since each trip contains two endpoints, total ridership is equal to half of total boardings and alightings. These figures also include Rail 2 Rail passengers traveling on the Pacific Surfliner using Metrolink or COASTER fare media. The top ten station pairs with the highest ridership and ticket revenue on the Pacific Surfliner route in FFY 2014-15 are listed in Table 2.3 below.

Table 2.3: Top Ten Pacific Surfliner Station Pairs FFY 2014-15

Station Pair by Ridership	Ridership	Rank	Station Pair by Revenue	Revenue
Los Angeles - San Diego	278,967	1	Los Angeles - San Diego	\$10,587,508
Los Angeles - Solana Beach	132,580	2	Los Angeles - Solana Beach	\$4,202,348
Los Angeles - Oceanside	100,181	3	Los Angeles - Old Town San Diego	\$3,216,758
Los Angeles - Old Town San Diego	84,229	4	Los Angeles - Oceanside	\$2,693,148
Irvine - San Diego	77,998	5	Los Angeles - Santa Barbara	\$2,013,789
Irvine - Solana Beach	77,430	6	Irvine - San Diego	\$1,826,842
Los Angeles - Santa Barbara	71,715	7	Anaheim - San Diego	\$1,691,327
Irvine - Los Angeles	66,875	8	Fullerton - San Diego	\$1,479,957
Fullerton - Los Angeles	64,008	9	Irvine - Solana Beach	\$1,256,415

Source: Amtrak, 2015

Historical Ridership and Revenue Performance²

Table 2.4 shows ridership and financial performance data on an annual basis from the start of state-supported service in FY 1976-77 through FY 2014-15. Ridership and farebox recovery climbed steadily through the early 1990s, with FY 1987-88 through FY 1992-93 experiencing particularly strong ridership growth and financial performance. The farebox recovery ratio was near or over 100 percent for these six consecutive years, and ridership peaked at 1.8 million in FY 1992-93.

A number of events occurred in the past that negatively impacted fare box return on the Pacific Surfliner route. Metrolink commuter rail service in Southern California was introduced in October 1992, and COASTER commuter rail service in the San Diego area was introduced in 1995. Around the same time that commuter rail service was introduced, additional state-supported service was added. The additional service did not stimulate ridership, but costs increased, resulting in a reduction of overall farebox return. Finally, in FY 1995-96 and again in FY 1996-97, operating costs increased due to reallocation of system-wide costs by Amtrak. This also negatively impacted farebox return.

Since the early 2000s, ridership on the Pacific Surfliner service has increased significantly, offsetting the initial financial impacts of the new commuter services. Ridership reached 2 million in FY 2002-03, and farebox return has exceeded 50 percent since FY 2000-01. Additionally, the introduction of the Rail 2 Rail program with Metrolink in September 2002, and in April 2004 with COASTER, was associated with another increase in ridership. Ridership peaked at nearly 2.9 million in FY 2007-08, a 68 percent increase over FY 2001-02 ridership (the year before Rail 2 Rail program was introduced), with farebox recovery nearing 60 percent.

² California State Rail Plan, 2013

The Pacific Surfliner lost ridership each year between FY 2007-08 and FY 2009-10 as a result of the significant economic recession affecting the nation. By FY 2014-15, Pacific Surfliner ridership had almost recovered to FY 2007-08 ridership levels, even though fewer train trips were operated than during the prior years during which ridership peaked. While Pacific Surfliner ridership and revenue have been increasing over time, there has been no additional service added for more than a decade (since 2004).

Table 2.4: Pacific Surfliner Historic Operating Performance

Fiscal Year	Daily Trips (Midweek/Weekend)	Ridership	Revenue	Expenses	Farebox Recovery	Service Notes
1976-77	8	607,976	\$ 598,140	\$ 1,662,714	36.0%	Fourth Los Angeles - San Diego RT added
1977-78	10	753,246	\$ 1,446,036	\$ 3,768,065	38.4%	Fifth Los Angeles - San Diego RT added
1978-79	12	967,316	\$ 2,203,403	\$ 4,333,602	50.8%	Sixth Los Angeles - San Diego RT added
1979-80	12	1,218,196	\$ 3,341,561	\$ 5,536,840	60.4%	
1980-81	14	1,238,135	\$ 4,032,480	\$ 6,572,539	61.4%	Seventh Los Angeles - San Diego RT added
1981-82	14	1,167,718	\$ 4,097,254	\$ 6,607,395	62.0%	
1982-83	14	1,131,146	\$ 4,094,750	\$ 6,928,334	59.1%	
1983-84	14	1,221,256	\$ 4,842,400	\$ 6,337,083	76.4%	
1984-85	14	1,240,003	\$ 5,410,502	\$ 6,411,308	84.4%	
1985-86	14	1,394,320	\$ 5,658,915	\$ 6,424,634	88.1%	
1986-87	14	1,461,003	\$ 6,072,523	\$ 6,510,113	93.3%	
1987-88	16	1,661,512	\$ 8,223,462	\$ 7,859,783	104.6%	Eighth Los Angeles - San Diego RT added
1988-89	16	1,717,539	\$ 11,458,084	\$ 10,563,459	108.5%	First extension to Santa Barbara added
1989-90	16	1,746,673	\$ 12,189,942	\$ 11,808,251	103.2%	
1990-91	16	1,791,781	\$ 13,306,307	\$ 13,364,150	99.6%	Second extension to Santa Barbara added
1991-92	18	1,673,107	\$ 13,152,063	\$ 13,245,924	99.3%	Ninth Los Angeles - San Diego RT added
1992-93	18	1,810,572	\$ 13,692,612	\$ 13,254,709	103.3%	
1993-94	18	1,699,882	\$ 12,725,094	\$ 14,017,591	90.8%	Third extension to Santa Barbara
1994-95	16	1,464,577	\$ 11,805,859	\$ 16,061,849	73.5%	Ninth Los Angeles - San Diego RT discontinued
1995-96	16	1,480,674	\$ 13,553,553	\$ 23,983,026	56.5%	First Los Angeles - San Luis Obispo RT added; fourth extension to Santa Barbara added
1996-97	16	1,617,641	\$ 14,804,355	\$ 39,563,546	37.4%	
1997-98	20	1,624,693	\$ 15,194,498	\$ 44,769,723	33.9%	Ninth Los Angeles - San Diego RT restored; tenth RT Los Angeles - San Diego RT added
1998-99	22	1,563,275	\$ 16,401,625	\$ 40,391,845	40.6%	11th Los Angeles - San Diego RT added
1999-00	22/24	1,567,318	\$ 17,883,725	\$ 37,497,489	47.7%	12th Los Angeles - San Diego RT added (Friday through Sunday)
2000-01	22/24	1,661,704	\$ 20,430,153	\$ 38,215,732	53.5%	
2001-02	22/24	1,742,768	\$ 20,922,453	\$ 39,374,190	53.1%	
2002-03	22/24	2,030,491	\$ 22,247,564	\$ 42,331,531	52.6%	
2003-04	22/24	2,307,010	\$ 24,559,183	\$ 45,300,782	54.2%	
2004-05	23/25	2,454,396	\$ 26,660,048	\$ 48,105,899	55.4%	Second Los Angeles - San Luis Obispo RT added; fifth extension to Santa Barbara added
2005-06	23/25	2,655,490	\$ 31,604,715	\$ 55,570,797	56.9%	
2006-07	23/25	2,685,194	\$ 34,753,372	\$ 58,389,864	59.5%	
2007-08	23/25	2,835,132	\$ 37,266,009	\$ 60,444,082	61.7%	
2008-09	23/25	2,696,951	\$ 34,857,678	\$ 61,635,574	56.6%	
2009-10	23/25	2,614,777	\$ 35,822,186	\$ 67,012,735	53.5%	
2010-11	23/25	2,746,320	\$ 38,739,760	\$ 69,156,690	56.0%	
2011-12	23/25	2,664,935	\$ 42,884,431	\$ 74,494,543	57.6%	
2012-13	23	2,689,465	\$ 64,446,130	\$ 104,521,098	61.7%	12th Los Angeles - San Diego RT discontinued (Friday through Sunday)
2013-14	23	2,673,170	\$ 69,013,726	\$ 102,843,812	67.1%	
2014-15	23	2,827,134	\$ 75,246,335	\$ 106,744,935	70.5%	

On-Time Performance

On-time performance is an important measure of service quality and passenger satisfaction. For the Pacific Surfliner service, endpoint on-time performance is defined as arrival at the endpoint station within ten minutes of scheduled arrival for trips up to 250 miles, and within 15 minutes of scheduled arrival for trips between 251 and 300 miles. Corridorwide on-time performance is calculated by taking the total number of trains arriving on time at the end point of the run divided by the total number of trains operated on the route. The uniform intercity passenger rail performance standards released by CalSTA set a 90 percent endpoint on-time performance goal. Train delays are recorded by the conductor in minutes on a delay report form and categorized by specific cause.

Historical Pacific Surfliner endpoint on-time performance from FFY 2003-04 to FFY 2014-15 is summarized in Table 2.5.

Table 2.5: Historical Pacific Surfliner Endpoint On-Time Performance

Year (FFY)	On-Time Performance
2003-04	87.1%
2004-05	72.9%
2005-06	76.1%
2006-07	74.8%
2007-08	76.1%
2008-09	83.1%
2009-10	76.3%
2010-11	77.5%
2011-12	75.4%
2012-13	82.4%
2013-14	77.6%
2014-15	77.9%

Source: Caltrans, 2015

Chapter 3: Operating Plan and Strategies

Existing Rail Service

As of the most recent schedule change (October 2015), Amtrak operates 23 one-way Pacific Surfliner trips each day, with 11 roundtrips between San Diego and Los Angeles, and one daily trip (761/1761) originating in Los Angeles and traveling north to Santa Barbara and San Luis Obispo. Of those, five daily roundtrips (the 700-series trains) extend north of Los Angeles to serve Santa Barbara and Goleta, with two of those roundtrips extending further north to serve San Luis Obispo. Dedicated Amtrak Thruway bus connections supplement the train service on the LOSSAN rail corridor by providing transportation to and from San Luis Obispo for rail passengers making connections to Pacific Surfliner trains in Santa Barbara.

The Pacific Surfliner services 31 stations, 17 of which are between San Luis Obispo and Los Angeles, with the remaining 14 located south of Los Angeles in Orange and San Diego counties (see Table 3.1 and Figure 3.1). The Camarillo, Moorpark, San Clemente Pier, and San Diego Old Town stations have limited service (not all trains stop at these stations). In addition, six daily Pacific Surfliner trains currently stop at four COASTER stations (Sorrento Valley, Encinitas, Carlsbad Poinsettia, Carlsbad Village) under the Rail 2 Rail program with NCTD.

Table 3.1: Pacific Surfliner Stations

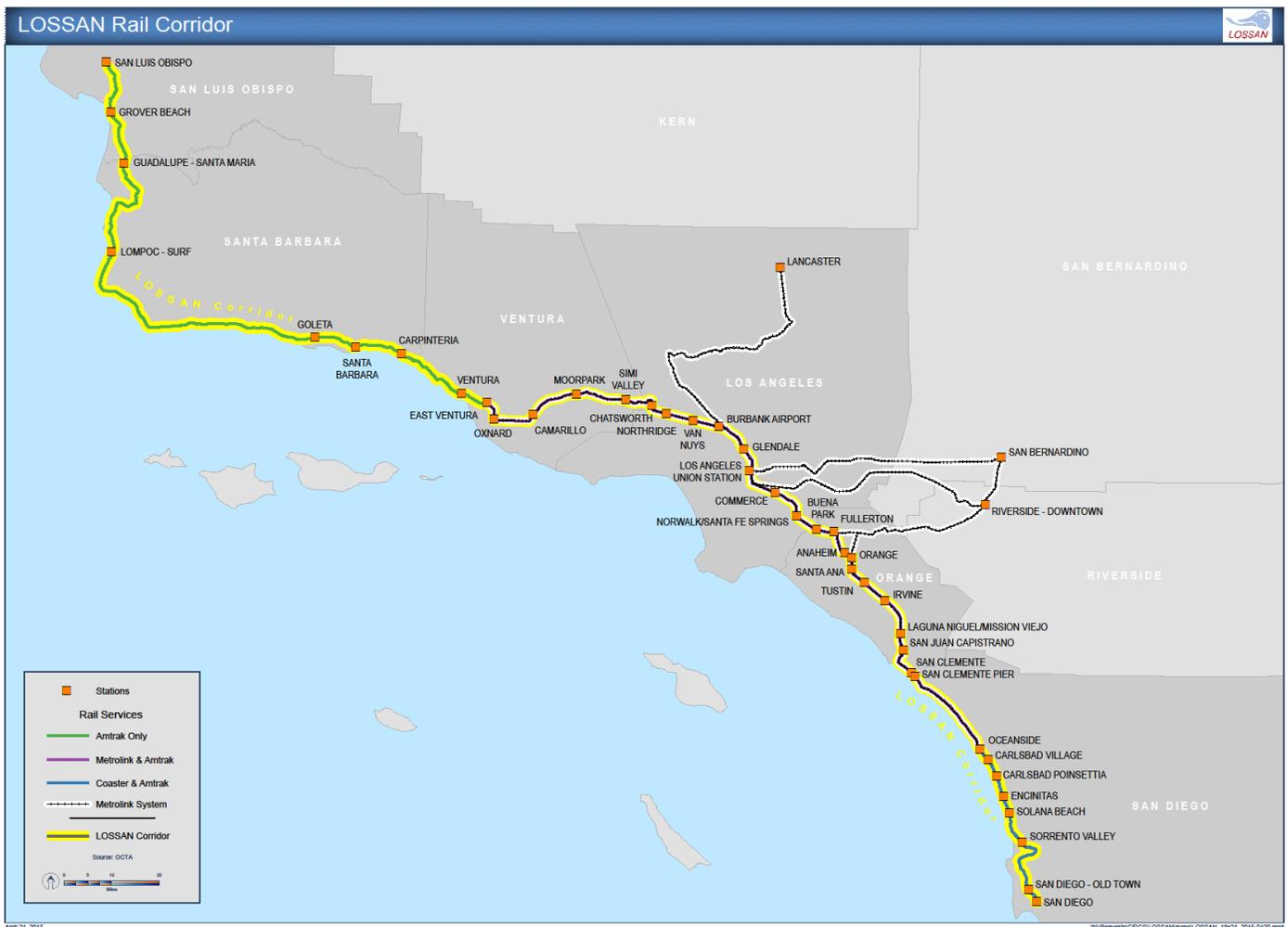
Station	County	Station Owner
San Diego – Santa Fe Depot	San Diego	ProLogis
San Diego – Old Town*	San Diego	California State Parks/ SDMTS
Sorrento Valley**	San Diego	NCTD
Solana Beach	San Diego	NCTD
Encinitas**	San Diego	NCTD
Carlsbad (Poinsettia)**	San Diego	NCTD
Carlsbad (Village)**	San Diego	NCTD
Oceanside	San Diego	NCTD
San Clemente Pier*	Orange	City of San Clemente
San Juan Capistrano	Orange	City of San Juan Capistrano
Irvine	Orange	City of Irvine
Santa Ana	Orange	City of Santa Ana
Anaheim	Orange	City of Anaheim
Fullerton	Orange	City of Fullerton
Los Angeles Union Station	Los Angeles	Metro
Glendale	Los Angeles	City of Glendale
Burbank-Bob Hope Airport	Los Angeles	Caltrans (platform)
Van Nuys	Los Angeles	Caltrans (platform); City of Los Angeles (parking lot)
Chatsworth	Los Angeles	City of Los Angeles
Simi Valley	Ventura	City of Simi Valley
Moorpark*	Ventura	City of Moorpark
Camarillo*	Ventura	City of Camarillo

Oxnard	Ventura	City of Oxnard
Ventura	Ventura	Union Pacific (platform); City of Ventura (parking)
Carpinteria	Santa Barbara	Union Pacific (platform); City of Carpinteria (parking)
Santa Barbara	Santa Barbara	Union Pacific (platform); City of Santa Barbara (parking and station)
Goleta	Santa Barbara	Amtrak (platform and station); City of Goleta (parking)
Lompoc-Surf	Santa Barbara	Union Pacific
Guadalupe – Santa Maria	Santa Barbara	Union Pacific
Grover Beach	San Luis Obispo	Union Pacific (platform), City of Grover Beach (parking)
San Luis Obispo	San Luis Obispo	Union Pacific (platform), City of San Luis Obispo (parking)

*Limited service – Not all trains stop

**Coaster/Rail 2 Rail stop only

Figure 3.1: LOSSAN Rail Corridor and Pacific Surfliner Stations



Amtrak Thruway Bus Service

Pacific Surfliner rail service is supplemented by Amtrak's network of Thruway buses that connect passengers throughout the LOSSAN rail corridor and beyond. In FY 2014-15, approximately 5 percent of Pacific Surfliner riders made a portion of their journey on an Amtrak Thruway bus. Amtrak contracts with private bus operators to provide this service, including both operating staff and the vehicles. The bus routes function as part of the Pacific Surfliner service, with coordinated connections, guaranteed seating, integrated fares and ticketing procedures, and inclusion in Amtrak's central information and reservation system in the same manner as the trains.

The Amtrak Thruway bus routes included in the Pacific Surfliner budget and operating statistics for FY 2014-15 are summarized below:

- **Route 4:** Los Angeles to Santa Barbara/Goleta. Two daily trips, 9,000 annual riders.
- **Route 17:** Santa Barbara to San Luis Obispo to Oakland (Connects with Capitol Corridor). Eleven daily trips, 90,000 annual riders.
- **Route 39:** Fullerton to Palm Springs and Coachella Valley. Four daily trips, 27,000 annual riders.

In addition, several Pacific Surfliner stations are served by an additional Amtrak Thruway bus route that is managed and fully funded by the SJJPA:

- **Route 1:** San Diego/Torrance/San Pedro/Long Beach/Los Angeles to Bakersfield (connection to San Joaquin Corridor, funded as part of San Joaquin route). Fourteen daily trips, 177,000 annual riders (up to 40 percent transferring to or from the Pacific Surfliner).

FY 2016-17 and FY 2017-18 Operating Plan

In FY 2016-17 and 2017-18, the LOSSAN Agency plans to work cooperatively with Caltrans DRMT to ensure sufficient state funding is provided to operate the existing level of Pacific Surfliner and Amtrak Thruway bus service on the LOSSAN rail corridor, while also exploring opportunities to enhance ridership, revenue, and on-time performance (OTP), as well as increasing service with the addition of a 12th daily roundtrip between Los Angeles and San Diego.

From 2001 to 2012, 22 Pacific Surfliner trains operated between Los Angeles and San Diego Monday through Thursday, and 24 trains Friday through Sunday. In October 2012, the 12th Friday through Sunday Pacific Surfliner roundtrip was discontinued, in part to reduce passenger confusion and create a consistent schedule seven days a week. However, the LOSSAN Agency has been working with Amtrak and Caltrans DRMT over the past year to explore opportunities to reinstate a 12th Pacific Surfliner roundtrip between Los Angeles and San Diego seven days a week. Initial operations modeling indicates that the additional roundtrip can be accommodated on existing infrastructure and by using existing equipment through more efficient equipment turns, but will require an additional crew. Though final schedules are still under development, the new service is planned to offer an earlier

northbound train from San Diego to Los Angeles that would allow passengers to arrive in Los Angeles before 8 a.m. Currently, the first northbound Amtrak train (763) from San Diego arrives in Los Angeles at 8:50 a.m. In the southbound direction, the new trip is planned to fill a gap between the existing 7:30 p.m. and 10:10 p.m. departures, pending final ridership and revenue modeling.

Initiation of this new service would increase operating costs for crew, fuel, stations, and maintenance, even though it is planned to use existing equipment. The LOSSAN Agency will pursue permission from all host railroads to run the additional trains, including COASTER, Metrolink, and BNSF Railway, which owns the tracks between Fullerton and Los Angeles. Updated ridership and revenue modeling runs will also be completed for these services prior to implementation in order to refine cost estimates and projected ridership and fare revenue. However, the LOSSAN Agency believes there is consumer demand for an additional Pacific Surfliner roundtrip, and repeated customer feedback points to particular demand for an earlier northbound arrival into Los Angeles. The LOSSAN Agency is working with Caltrans DRMT to implement this service as quickly as possible and no later than fall 2016.

In addition, the LOSSAN Agency has been working with Caltrans DRMT and Amtrak to determine the feasibility of providing weekday peak-hour Pacific Surfliner service between Ventura and Santa Barbara counties by rescheduling existing trains north of Los Angeles thereby requiring no additional equipment or train slots. This work will continue through the early part of FY 2016-17, with service implementation possible by fall 2016.

Table 3.2: Projected Pacific Surfliner Service Levels

Route Segments	FY 2015-16	FY 2016-17	FY 2017-18
San Diego – Los Angeles	22 trains	24 trains	24 trains
Los Angeles – Santa Barbara/Goleta	10 trains	10 trains	10 trains
Los Angeles – Santa Barbara – San Luis Obispo	4 trains	4 trains	4 trains

In FY 2016-17 and FY 2017-18, the LOSSAN Agency will work with Amtrak to evaluate and pursue cost-effective service expansion opportunities to improve ridership, revenue, and OTP on the Pacific Surfliner service, including the implementation of Phase 1 of the “robust timetable” work conducted by SMA Consulting in June 2016. These schedule changes are intended to improve the overall reliability of all passenger rail services operating on the LOSSAN rail corridor by providing timetables that distribute “schedule pad” throughout the route and ensure that trains are able to reliably make meets on single track territory. Funding is being pursued for a similar scheduling exercise on the north end of the corridor between Los Angeles and San Luis Obispo. The LOSSAN Agency also expects to work with the Caltrans DRMT and SMA Consulting on the second phase of the scheduling work which is intended to be a more extensive rethinking of the schedules for all passenger rail services operating on the LOSSAN rail corridor.

In federal FY 2014-15, a number of Pacific Surfliner trains repeatedly experienced standee conditions due to high ridership demand during peak periods, particularly on weekends, during holidays, and during the summer season. The LOSSAN Agency will continue to work with Amtrak and Caltrans DRMT over the next year to identify additional railcars to supplement the existing

Pacific Surfliner fleet in order to meet demand during peak travel periods. The LOSSAN Agency will also continue to work with Caltrans DRMT to identify future equipment needs, funding sources, and delivery schedules for service improvements to accommodate ridership demand.

Service expansion opportunities include not only regularly scheduled trains, but also special event trains. In the past, Caltrans DRMT and Amtrak have partnered to provide additional capacity to major events accessible via the Pacific Surfliner, including the Del Mar Races, Oxnard Strawberry Festival, Comic-Con International, and San Diego Chargers games. The LOSSAN Agency plans to build on the success of that special event service and look for opportunities to promote the Pacific Surfliner as the travel mode of choice to major events, while also ensuring that sufficient capacity is made available on the Pacific Surfliner to carry passengers that want to use the service.

To enhance the existing Pacific Surfliner service, the LOSSAN Agency remains committed to working with Caltrans DRMT, SJJPA, Metrolink, COASTER, Amtrak, and regional and local transit providers to improve transit and rail connections to the Pacific Surfliner. To help achieve this, the LOSSAN Agency will utilize its member agencies to assist in coordinating improved communications and connectivity, particularly with local transit operators. The LOSSAN Agency received a Transit and Intercity Rail Capital Program grant in June 2015 that will allow the initiation of a new Pacific Surfliner Transit Transfer Program in summer 2016. This program will provide seamless connectivity for Pacific Surfliner passengers to more than 12 local transit operators serving Pacific Surfliner stations.

Moving forward, the LOSSAN Agency will also explore opportunities to have timed connections with local transit operators at key locations in order to help provide reliable first- and last-mile connections for Pacific Surfliner passengers. The LOSSAN Agency will also work with local transit agencies to explore opportunities to provide better transit connections from Pacific Surfliner stations to local airports, including John Wayne Airport in Orange County, Los Angeles International Airport, and San Diego International Airport. The Pacific Surfliner already directly serves the Burbank-Bob Hope Airport.

No changes are currently planned to Amtrak Thruway bus service during this period. However, LOSSAN Agency staff will carefully review schedules as well as ridership and revenue data for the three routes under its control, and propose changes to help make the service more effective, as appropriate.

Ventura to Santa Barbara Peak-Period Service

Improving rail service between Ventura and Santa Barbara counties during peak hours has been identified as a priority in several LOSSAN Agency planning documents, including the Strategic Implementation Plan,. The Coast Corridor is the mainline railroad linking Ventura and Santa Barbara counties and largely parallels U.S. 101, which is heavily congested during peak travel times. The southern components of the Coast Corridor are comprised of the UPRR Santa Barbara Subdivision and SCRRA's Ventura Subdivision, which is mostly single tracked, with only one short siding between Ventura and Santa Barbara. In fact, track capacity has been reduced over time with the loss of one of two rail sidings between Ventura and Santa Barbara due to storm damage in 1978.

The Coast Corridor between Ventura and Santa Barbara counties has been the focus of a number of planning studies over the past two decades. These studies have analyzed various services and infrastructure improvements that focused on improving passenger rail service reliability and frequency. The largest planning study was the 101 in Motion plan, conducted by SBCAG, which recommended a “lane and a train” strategy to address the significant traffic congestion between Ventura and Santa Barbara counties. SBCAG programmed \$140 million in local transportation tax funding as well as \$160 million in local gas tax revenue toward the construction of a ten-mile high-occupancy vehicle lane on US 101, and has \$25 million in dedicated local sales tax revenue toward rail improvements in the corridor.

Based on the results of previous studies, it has been determined that in order to increase the level of passenger rail service along the corridor, significant track and signal improvements, capacity enhancements and equipment purchases would be necessary. However, these improvements and acquisitions will require both time and financial resources. There is Interregional Transportation Improvement Program funding programmed for extending the Seacliff siding, and environmental and engineering work was initiated in 2015.

As part of two statewide rail planning efforts, the Network Integration Plan and the Travel Market Analysis, recommendations for rail service improvements are expected to be considered for this corridor in 2016, with operational modeling work led by CalSTA currently ongoing. Additional trains cannot be added to provide peak-period service between Ventura and Santa Barbara counties without additional train slots, which would require the completion of the capital projects discussed above. The modeling work will determine if it is feasible to provide the requested peak-period service through Pacific Surfliner schedule revisions that would better serve existing demand, enhance ridership and revenue, and maintain or enhance farebox recovery.

Emerging Corridors

While not immediately planned to begin operation, a number of future service expansion projects are in the planning stages, and are discussed in greater detail in the Emerging Corridors chapter of the business plan. The LOSSAN Agency will continue to work with Caltrans DRMT and Amtrak to advance these services, including; Coast Daylight rail service which would extend the Pacific Surfliner from San Luis Obispo to San Jose or San Francisco; and the proposed Coachella Valley service which would connect to the LOSSAN rail corridor at Los Angeles and provide intercity passenger rail service between Los Angeles and the Coachella Valley, including Palm Springs and Indio.

Service Optimization

Though it already has the distinction of being the second-busiest intercity passenger rail route in the United States, the Pacific Surfliner service has great potential for increased ridership, revenue, better service coordination, and improved performance. During the coming year, the LOSSAN Agency will continue to implement service optimization strategies aimed at building on past success to further improve the Pacific Surfliner service. Status updates on the progress of these activities are provided below.

Train Monitoring:

1. Conduct regular multi-agency working group meetings that include the host railroads and Amtrak to discuss OTP. The meetings include discussion on most frequent types of delays, reasons for the delays, and identify potential solutions so future delays can be prevented. *(Status: In progress via Corridor Improvement Team meetings)*
2. Work with the host railroads and Amtrak to identify capital and/or system improvements to improve OTP. This includes annual hy-rail trips over the corridor with the host railroads and Amtrak staff. *(Status: In progress via regular calls/meetings with host railroads and network integration team)*
3. Work with Amtrak to develop a root cause analysis for major delays, including procedures to reduce maintenance-related delays; analyze daily delay reports to look for recurring trends; enforce penalties against Amtrak for operator responsible delays per the operating agreement. *(Status: In progress and discussed at monthly operations meetings with Amtrak)*
4. Carefully monitor performance of Pacific Surfliner service against approved uniform performance standards adopted by CalSTA and report to the LOSSAN Board quarterly, including proposed actions to meet 90 percent endpoint OTP standard. *(Status: In progress via quarterly corridor trends report)*
5. Work with host railroads and operators to refine timetables to ensure OTP is maintained through achievable travel times and well-coordinated meets that reduce the likelihood of cascading delays. *(Status: In progress via joint scheduling meetings and SMA Consulting robust timetable work, with phase 1 implementation scheduled for June 2016)*

Train and Connecting Bus Schedule Adjustments:

1. Work with Amtrak to evaluate existing train and connecting bus schedules to determine if there are potential changes that could improve ridership, revenue, and cost effectiveness. Schedule adjustments have the potential to improve the Pacific Surfliner performance without requiring additional financial resources. *(Status: In progress via work with SMA Consulting)*
2. Closely review ridership and revenue on Amtrak Thruway bus routes to ensure the routes are being operated as efficiently as possible, including connections to San Joaquin and Capitol Corridor. *(Status: Planned for FY 2016-17)*
3. Continue to work with Amtrak to hold regular timetable and work window coordination meetings that include host railroads and rail operators along the LOSSAN rail corridor. *(Status: In progress via monthly work window coordination meetings and joint scheduling meetings before each coordinated LOSSAN rail corridor schedule change)*
4. Work with host railroads to reevaluate train schedules and dispatching procedures after completion of capital projects to ensure effective use of capacity and operational improvements. *(Status: In progress via work with SMA Consulting)*

Equipment and Crew Utilization:

1. Work with Amtrak to conduct a thorough analysis of crew and equipment utilization to identify efficiencies that could allow additional trips to be added in a cost-effective or potentially cost-neutral manner. (*Status: In progress*)
2. Work with Amtrak to determine if any efficiencies are possible from combining the Pacific Surfliner and Metrolink crew bases in Los Angeles, as both services are operated by Amtrak train and engine crews over a largely parallel territory. (*Status: On hold pending outcome of Metrolink procurement for train and engine crews*)

Service Disruptions:

1. Work proactively to further strengthen partnerships and cooperation with Metrolink and COASTER, as well as host railroads, to ensure the best passenger experience possible in the event of a service disruption. (*Status: In progress*)
2. Prepare template for after-action reports, and customer communication in the event of major delays or service disruptions. (*Status: Planned for FY 2016-17*)
3. Work with Amtrak to explore the feasibility of negotiating bus bridge agreements with local transit agencies to assist during service disruptions. (*Status: Under discussion, action possible in FY 2016-17*)
4. Work with rail operators and local law enforcement agencies to ensure tracks are reopened as quickly as possible after trespasser incidents. (*Status: In progress via discussions with Amtrak and host railroads*)
5. Work with Amtrak and member agencies on proactive outreach prior to planned absolute work windows, including an extensive public information campaign and a note apologizing for the inconvenience with a discount offer for a future trip. (*Status: Completed for work windows in 2015 and early 2016; planned for upcoming work windows in 2016 and 2017*)
6. Partner with Operation Lifesaver, member agencies and local first responders to increase awareness of rail safety and emergency preparedness. (*Status: Ongoing*)

Service Planning:

1. Work with Amtrak, host railroads, and commuter rail operators in the LOSSAN rail corridor on coordinated service planning efforts, utilizing consultant resources as necessary, for both the short and long term. (*Status: In progress via work with SMA Consulting; additional work planned in FY 2016-17 and 2017-18*)
2. Explore potential markets for new and expanded intercity rail service in Southern California based on ridership and travel demand data, including Santa Barbara to Ventura peak-period service, early morning service from San Diego to Los Angeles and Coast Daylight service to San Francisco. (*Status: In progress*)

3. Work with Caltrans DRMT on review and possible implementation of recommendations from Southern California Coordinated Rail Planning Study being completed by the consulting firm, SMA Consulting. (*Status: Initial schedule changes planned for June 2016*)
4. Work with Amtrak to improve on-board food and beverage service and selection, including focus on sourcing products from local and regional vendors. (*Status: Ongoing; next menu change planned for summer 2016*)

Chapter 4: Performance Standards and Metrics

Background

The LOSSAN Agency has developed performance standards for the Pacific Surfliner in coordination with Caltrans DRMT and CalSTA. Pursuant to SB 1225, the Secretary of CalSTA was required to establish a set of uniform performance standards (UPS) for the state’s three intercity passenger rail corridors to control cost and improve efficiency by June 20, 2014. The performance standards measure usage (ridership and passenger miles), cost efficiency (farebox recover and cost per passenger mile), and reliability (endpoint/all station OTP and operator caused delays). The performance measures are summarized in Table 4.1.

Table 4.1: Uniform Performance Standards

Performance Standard	Category	Measurement
Passenger miles	Usage	Ongoing growth in passenger miles* traveled on state-funded bus and rail services in proportion to population growth in counties served
Ridership	Usage	Growth in ridership in proportion to corridor population growth, on both bus and rail
Farebox recovery	Cost efficiency	55 percent, inclusive of Amtrak Thruway bus routes
Cost per passenger mile	Cost efficiency	Continuous improvement
Endpoint OTP	Service quality	90 percent of endpoint station arrivals within 15 minutes of schedule for trips over 251 miles and within 10 minutes for trips up to 250 miles, calculated quarterly
All-stations on-time performance	Service quality	90 percent of arrival at all station stops within 15 minutes of schedule, calculated quarterly
Operator responsible delays per 10,000 train miles	Service quality	Fewer than 325 minutes of delay per 10,000 train miles

* One passenger traveling one mile = one passenger mile

The performance standards are based on information that Amtrak is currently required to report to federal agencies, and detailed performance reporting requirements will also be included as part of future Amtrak operating contracts.

There are a number of additional performance measures that, while not required to be reported to the state, can be used by the LOSSAN Agency to evaluate the value and efficiency of the service. Some of the metrics that may be examined include:

- Passenger miles per train mile (load factor)
- Passenger miles per car mile

- Passenger miles per diesel fuel mile
- Revenue per available seat mile
- Customer Satisfaction Index
- Cost per available seat mile
- Host railroad-responsible delays per 10,000 train miles
- Food and beverage cost recovery by route

Reporting Requirements

In support of the UPS, the LOSSAN Agency utilizes the measures outlined above to continuously monitor and improve the usage, cost efficiency, and service quality of the Pacific Surfliner service. The quarterly LOSSAN rail corridor trends report is prepared by LOSSAN Agency staff and presented to the LOSSAN TAC and Board, and the report tracks the service performance against the adopted UPS.

The LOSSAN rail corridor is unique from the state's other two intercity rail corridors in a number of ways, including the reciprocal Rail 2 Rail program with two different commuter railroads that allows commuter rail passengers to travel on some Pacific Surfliner trains and vice versa, within the limits of their existing commuter rail ticket. The Rail 2 Rail program impacts Pacific Surfliner ridership and revenue. In addition, unlike on the CCJPA and SJJPA, where the majority of rail cars and locomotives are state owned, the majority of the rail cars and all locomotives used on the Pacific Surfliner service are owned by Amtrak, and prior to October 2013, Amtrak funded approximately 30 percent of the annual operating costs for the Pacific Surfliner service.

The transition of the Pacific Surfliner service to a fully state-funded service, as required by PRIIA Section 209, as well as the additional capital equipment charges to use Amtrak-owned equipment, impacts capital and operating costs, and must be considered in examining historical trends in costs and farebox recovery. However, beginning in FY 2015-16, Caltrans DRMT will fund the Amtrak capital equipment charge through a separate contract, so it will not impact the operating agreement between Amtrak and the LOSSAN Agency.

The first full year of PRIIA Section 209 reporting (FY 2014-15) was also the year the state funding for the service transitioned from a fixed cost to an actual cost based contract. These two factors have impacted the baseline and have not been in place long enough to establish a basis for trend analysis. Once the full impact of these adjustments is realized, a baseline will be established against which future trends can be compared.

FY 2014-15 Performance Results

The performance of the Pacific Surfliner service is summarized, along with the percent of improvement over the baseline, in Table 4.2. Some standards are presented as a fixed target, while others will simply require demonstration of continuous improvement over time.

Table 4.2: FY 2014-15 Performance Results

Performance Standard	FY 2013-14	FY 2014-15	% Change	Measurement/Performance Standard
Usage				
Ridership	2,673,170	2,827,134	5.8%	Ongoing growth
Passenger Miles	231,876,901	246,451,396	6.3%	Ongoing growth
Cost Efficiency				
Farebox Recovery	67.1%	70.5%	5.1%	55 percent (inclusive of Amtrak Thruway bus routes.
Cost/Passenger Mile	Not Available	\$ 0.41		Continuous improvement
Service Quality				
Endpoint On-Time Performance	77.0%	77.9%	1.2%	90 percent of endpoint arrivals within 10 minutes (up to 250 miles) or 15 minutes (over 251 miles) of schedule
All-Stations On-Time Performance	87.1%	88.1%	1.1%	90 percent of arrival at all station stops within 15 minutes of schedule
Operator Delays/10,000 Train Miles	Not Available	Not Available		Fewer than 325 minutes of delay per 10,000 train miles

Values in **red** indicate a performance standard not being met

The following are highlights for FY 2014-15:

- Total ridership on the Pacific Surfliner was 2,827,134, a 5.8 percent increase over the prior year. This represents the **largest ridership increase of any Amtrak route for the FY**, including both state-supported and long-distance routes.
- Although not required reporting under the UPS, a strong indicator of the health of the service is total revenue, exceeding \$70 million, a seven percent increase over the prior year.
- Farebox recovery continues to steadily increase, with a 5.1 percent gain over the prior year. The current 70.5 percent recovery rate far exceeds the mandated 50 percent.
- OTP continues to be an area that does not meet the performance standard, although improvement was made over the prior year in both the endpoint and all-station categories. Staff is working with Amtrak and host railroads to identify corrective actions, as further discussed in Chapter 3.

As indicated in Table 4.2, the data for operator delays per 10,000 train miles was unavailable for the reporting period. The LOSSAN Agency continues to work with Amtrak to make this data available for reporting against the UPS.

FY 2015-16 Performance Standards and Results to Date

The performance standards for FY 2015-16 remain unchanged from the prior year. With fixed targets established for some standards and a demonstration of growth used for others. For FY 2015-16, as of December 2015, the following can be reported:

- Ridership: Year-to-date (through December 2015) ridership is up 3.5 percent over the same quarter in FY 2014-15.
- Revenue: Year-to-date (through December 2015) revenue is up 2.4 percent over the same period the prior year.
- OTP: Year-to-date (through December 2015) OTP currently stands at 78.6 percent, a 7.2 percent improvement over the same period in FY 2014-15.

FY 2015-16 and FY 2016-17 Action Plan

The LOSSAN Agency will continue to monitor system performance on a monthly basis and report via the quarterly LOSSAN rail corridor trends report. As OTP continues to be an area of concern, LOSSAN Agency staff has been working with Amtrak to collate and classify the root causes for delay via daily OTP reports. For the first three months in FY 2015-16, a significant portion of the identified issues were a direct result of host railroad delays, with freight train interference being among the chief causes. Through the Corridor Improvement Team, which includes all rail operators and host railroads, the LOSSAN Agency is working to identify the root causes of delay and establish a set of dispatch policies and schedule adjustments that will provide more realistic operating parameters.

Modification of Performance Standards

The UPS establishment document identifies a number of factors that may lead to the need to modify the adopted UPS. Currently, no basis for modifications of the standards exist. As more historical data is gathered, the UPS may be revisited to establish standards that better capture the performance of the service.

Chapter 5: Capital Improvements

Since 1990, the state has invested more than \$1.9 billion in capital improvements on the state's three intercity rail corridors. During that time, LOSSAN member agencies have been successful in securing over \$100 million in federal grants for preliminary engineering, environmental documentation, final design, and construction of capital projects along the LOSSAN rail corridor. These improvements have allowed for significant increases in safety, operational efficiency, and capacity; however, approximately two-thirds of the corridor remains single track, which will continue to hinder the expansion of service and overall efficiency. An extensive capital improvement program of more than \$5 billion in additional capacity, station improvements, signal and communications improvements, and other capital projects remains unfunded.

There are seven different ROW owners along the corridor and each has made investments within their territory; however, the capital needs of the corridor well outweigh the available funding resources. Many segments of the LOSSAN rail corridor are limited by the lack of passing or second main tracks. In San Diego County, 34 percent of the corridor is comprised of a single main line track and 80 percent of the LOSSAN rail corridor north of Los Angeles is currently single track.

The capital needs have been compiled in several sources, including the LOSSAN Strategic Implementation Plan, California State Rail Plan, CHSRA Southern California early investment/connectivity program, as well as each member agencies' individual planning documents. A significant hurdle the intercity passenger rail services in California must overcome is the lack of a long-term sustainable capital funding source. There is no dedicated source at the federal or state levels, leaving these services subject to the annual budget process or one-time ballot measures (e.g., Propositions 1A and 1B) at the state level, and highly competitive grant programs at both the federal and state levels.

Project Coordination

The LOSSAN Agency continues to coordinate with the various member agencies and station owners in an effort to pursue funding opportunities that bring benefits to the larger corridor. As part of that effort, staff has developed a comprehensive list of capital projects, including those in both the planning and implementation phase. Specific attention has been given to identifying projects that have unfunded elements. An effort is being made to update this list semi-annually through the LOSSAN Staff Working Group. The list will then be used in both funding and legislative pursuits, with a focus on leveraging any existing funds to advance capital projects that benefit the LOSSAN rail corridor. This unified voice advocating for capital funding and key projects will make the LOSSAN Agency's requests more compelling and competitive.

It is also important to note that the class 1 railroads own approximately 55 percent of the ROW over which the Pacific Surfliner operates. The Union Pacific owns 176 miles, and BNSF Railway owns 21 miles. This ownership makes them vested and necessary partners in many of the projects benefitting the corridor. The relationship with these railroads is key to the continued

successful operation of the service, and LOSSAN Agency staff continues to coordinate capital improvement efforts with these partners.

While the LOSSAN rail corridor has and will continue to benefit from the projects currently funded and underway, the capital needs continue to exceed available financial resources. Details on the capital projects both planned and in process are contained in Table 5.1. A graphic indicating approximate locations of the improvements is shown in Figure 5.1.

Table 5.1 LOSSAN Corridorwide Capital Projects

Project	Total Cost Estimate (000s)	Funding Status	Current Phase	Completion (Estimate)	Description
SAN DIEGO COUNTY					
Los Penasquitos Lagoon Bridge Replacements	\$31,000	F	C	2017	Replace three aging timber trestle lagoon bridges for state of good repair in City of San Diego
North Green Beach Bridge Replacement	\$1,000	F	FD	2016	Replace northern most timber trestle segment of San Onofre Creek Bridge
Oceanside Station Pass-Through Track	\$26,000	F	FD	2017	Add third station track to relieve train congestion
Poinsettia Station Improvements	\$24,000	P	FD	2018	Pedestrian undercrossing and inter-track fence to eliminate Thruway train "hold out" rule in Carlsbad
Batiquitos Lagoon Double Track	\$54,000	P	FD	2019	0.8 miles of double track and lagoon bridge replacement in City of Carlsbad
San Elijo Lagoon Double Track	\$72,000	F	FD	2018	1.5 miles of double track and lagoon bridge replacement in City of Encinitas
Elvira to Morena Double Track	\$170,000	P	FD	2019	2.6 miles of double track, curve realignment in City of San Diego
San Diego River Bridge	\$94,000	P	FD	2019	0.9 miles of double track and river bridge replacement in City of San Diego
Eastbrook to Shell Double Track	\$70,000	P	FD	2011-2020	.6 miles of double track and lagoon bridge replacement in City of Oceanside
Carlsbad Village Double Track	\$60,000	P	PE/ENV	2011-2020	1.0 mile of double track and lagoon bridge replacement in City of Carlsbad
Sorrento to Miramar Double Track (Phase 2)	\$98,000	P	PE/ENV	2021-2030	1.8 miles of double track, curve realignments in City of San Diego
Rose Canyon Bridge Replacements	\$15,000	P	PE/ENV	2020	Replaces three aging timber trestle railway bridges in City of San Diego
San Dieguito Bridge Double Track and Platform	\$180,000	P	PE/ENV	2021-2030	1.1 miles of double track and lagoon bridge replacement in City of Del Mar
San Onofre to Pulgas Double Track (Phase 2)	\$29,000	P	FD	2021-2030	1.6 miles of double track on Camp Pendleton
Encinitas Grade-Separated Pedestrian Crossings	\$18,000	P	P	2011-2020	Construct remaining three pedestrian undercrossings in City of Encinitas
Airport Intermodal Transportation Center	\$170,000	P	P	TBD	Track improvements and new station adjacent to San Diego International Airport
Stuart Mesa Maintenance Facility Capacity Enhancement	\$21,000	N	P	2030	Additional storage tracks to accommodate 2030 service levels
Camp Pendleton Station	\$20,000	N	P	TBD	New rail station service Marine Corps Base Camp Pendleton
Oceanside Transit Center Parking	\$24,000	N	P	2021-2030	Parking structure
Carlsbad Village COASTER Station Parking	\$19,000	N	P	2021-2030	Parking structure
Carlsbad Poinsettia COASTER Station Parking	\$22,000	N	P	2021-2030	Parking structure
CP Songs to CP "Trestles" Double Track	\$38,000	N	P	TBD	Approximately one mile of double track on Camp Pendleton
Moonlight to Swami Double Track	\$21,000	N	P	2021-2030	.8 miles of double track in City of Encinitas
Leucadia Boulevard Grade Separation	\$154,000	N	P	2041-2050	Grade Separation in City of Encinitas
Solana Beach Station Parking	\$26,000	N	P	2011-2020	Parking Structure
Del Mar Tunnel	\$1,200,000	N	P	2041-2050	Tunnel and approximately four miles of double track in City of Del Mar
Los Penasquitos Lagoon Double Track	\$82,000	N	P	2041-2050	1.7 miles of double track and lagoon bridge replacements in City of San Diego
Sorrento Valley COASTER Station Parking	\$21,000	N	P	2021-2030	Parking structure
Santa Fe Station Parking	\$8,000	N	P	2021-2030	Additional station parking
La Costa to Moonlight Double Track	\$60,000	N	P	2021-2030	1.9 miles of double track in the City of Encinitas
Chesterfield Drive Crossing Improvements	\$4,000	F	FD	2018	At-grade crossing improvements including bike and pedestrian facilities in City of Encinitas
San Onofre Bridge Replacements	\$14,000	F	P	TBD	Replace three aging timber trestle railway bridges for state of good repair in North County San Diego
Convention Center Platform	\$21,000	N	P	2021-2030	Station platform at San Diego Convention Center
San Diego County Subtotal		\$2,867,000			

Table 5.1 LOSSAN Corridorwide Capital Projects (continued)

Project	Total Cost Estimate (000s)	Funding Status	Current Phase	Completion (Estimate)	Description
ORANGE COUNTY					
Laguna Niguel to San Juan Capistrano Passing Siding	\$26,000	F	FD	2018	1.8 miles siding extension from City of Laguna Niguel to City of San Juan Capistrano
Anaheim Canyon Station Double Track	\$20,000	F	P	2018	Additional track at Metrolink Station
17th Street Grade Separation - Santa Ana	\$55,000	P	PE/ENV	TBD	Grade separation for freight, commuter, and intercity rail
State College Grade Separation	\$150,000	P	PE	TBD	Grade separation for freight, commuter, intercity, and high-speed services
Santa Ana Boulevard Grade Separation - Santa Ana	\$74,000	P	PE/ENV	TBD	Grade separation for freight, commuter, and intercity rail
Irvine Third Main Track Extension	\$75,000	N	P	TBD	Approximately eight miles of third track in City of Irvine
Ball Road Grade Separation	\$71,000	N	P	TBD	Grade separation for freight, commuter, intercity, and high-speed services
Orangethorpe Grade Separation	\$99,000	N	P	TBD	Grade separation for freight, commuter, intercity, and high-speed services
Grand Avenue Grade Separation - Santa Ana	\$72,000	N	P	TBD	Grade separation for freight, commuter, and intercity rail
Main Street Grade Separation - Orange	\$69,000	N	P	TBD	Grade separation for freight, commuter, and intercity rail
Serra Siding Extension	\$15,000	N	P	TBD	Siding extension in south Orange County
<i>Orange County Subtotal</i>		\$726,000			
LOS ANGELES COUNTY					
Rosecrans/Marquardt Grade Separation	\$120,000	F	PE/ENV	2018	Grade separates Rosecrans/Marquardt and BNSF mainline in the cities of Santa Fe Springs/La Mirada
Van Nuys North Platform	\$40,000	F	FD	2018	Center platform at Van Nuys Station to eliminate chokepoint
Bob Hope Airport Pedestrian Bridge	\$17,000	F	FD	2018	Pedestrian bridge linking station to RITC
Commerce to Fullerton, Triple Track	\$160,000	P	C	2016	15 miles of third main track and six grades seps on the BNSF between Los Angeles and Fullerton.
Union Station Run-Through Tracks (SCRIP)	\$350,000	P	PE/ENV	2017	Track and signal improvements to facilitate Thruway train movements at Los Angeles Union Station
CP Raymer to CP Bernson Second Main Track	\$88,000	P	PE/ENV	2018	Seven miles of second main track in Northridge
Doran Street and Broadway/Brazil Safety and Access Project	\$90,000	P	PE/ENV	2019	Grade separates both Doran Street and Broadway/Brazil along San Fernando Road
Norwalk/Los Nietos Grade Separation	\$60,000	N	P	TBD	Grade separates Norwalk/Los Nietos and BNSF mainline in the City of Santa Fe Springs
Lakeland Road Grade Separation	\$60,000	N	P	TBD	Grade separates Lakeland Road and BNSF mainline in the City of Santa Fe Springs
Pioneer Blvd Grade Separation	\$60,000	N	P	TBD	Grade separates Pioneer Boulevard and BNSF mainline in the City of Santa Fe Springs
Burbank Junction Track Realignment	\$9,000	N	P	TBD	Realignment and high-speed switches at junction used by Metrolink, Surfliner, and Amtrak long-distance trains
CP Raymer Universal Crossover	\$5,000	N	P	TBD	Track improvement to increase operational flexibility
Chatsworth Station Improvements	\$13,000	N	P	TBD	Lengthen platforms, build pedestrian grade separation, and add storage track
North Main Street Grade Separation	\$91,000	N	P	TBD	Grade separates the River Corridor at MP 139.6
Glendale Station Redesign	\$20,000	N	P	TBD	Extend platform to allow for operation of eight car trains and improve station design
Tunnel 26 Improvements	\$50,000	N	P	TBD	Increase clearance, improve lining, and track
<i>Los Angeles County Subtotal</i>		\$1,233,000			

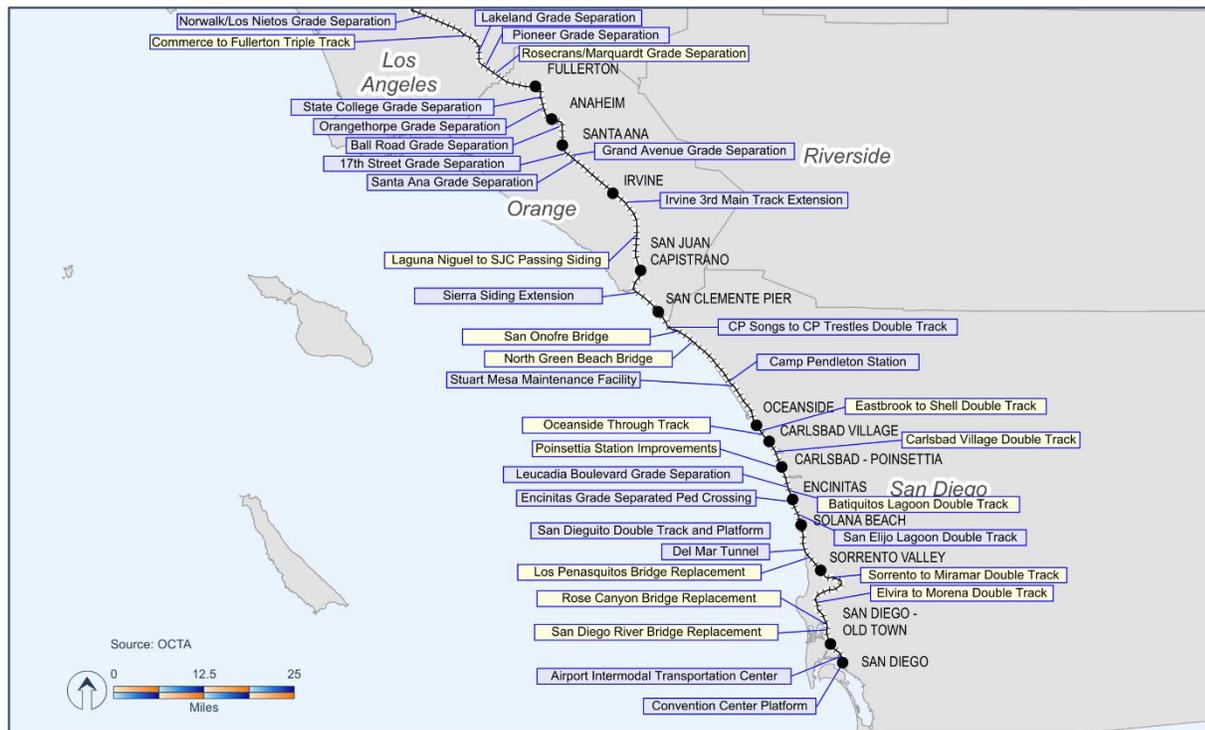
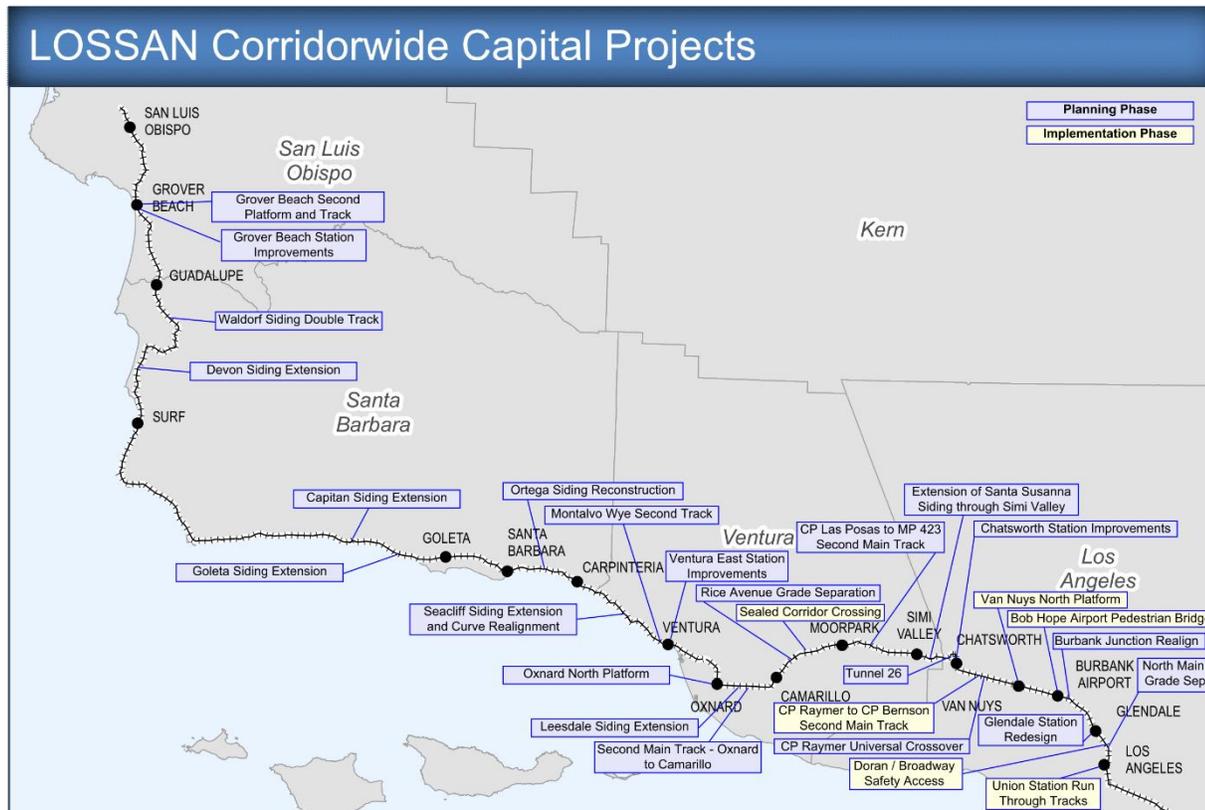
Table 5.1 LOSSAN Corridorwide Capital Projects (continued)

Project	Total Cost Estimate (000s)	Funding Status	Current Phase	Completion (Estimate)	Description
VENTURA COUNTY					
Sealed Corridor Crossing Improvements	\$13,000	F	C	2015	Crossing safety improvements at grade crossings in Simi Valley and Moorpark
Rice Avenue Grade Separation	\$35,000	P	PE/ENV	TBD	Construct Rice Avenue flyover along Hwy 101 between Vineyard and Rice Ave
Seacliff Siding Extension and Curve Realignment	\$28,000	P	PE/ENV	2018	Extend siding to 10,000 feet and reduce curvature to allow for higher speeds and reduced maintenance
CP Las Posas to MP 423 Second Main Track	\$57,000	N	P	TBD	Four miles of second track in City of Moorpark
Oxnard to Camarillo Second Main Track	\$15,000	N	P	TBD	Additional continuous second track in conjunction with Leesdale Siding
Leesdale Siding Extension	\$15,000	N	P	TBD	Siding extension
Santa Susana Siding Extension	\$40,000	N	P	TBD	Siding extension, second platform at Simi Valley Station
East Ventura Station Improvements	\$5,000	N	P	TBD	Station platform and track improvements to facilitate Ventura to Santa Barbara commuter service
Oxnard Station North Platform	\$20,000	N	P	TBD	Second platform at Oxnard Station
Montalvo Wye Second Track	\$55,000	N	P	TBD	Additional track capacity
<i>Ventura County Subtotal</i>		\$283,000			
SANTA BARBARA COUNTY					
Ortega Siding	\$20,000	P	PE/ENV	TBD	Reconstruct siding to increase passenger and freight capacity on a 17 mile stretch of single track
Goleta Storage Expansion	\$10,000	P	P	TBD	Expand Goleta storage capacity to allow two trainsets
Goleta Siding Extension	\$10,000	N	P	TBD	Siding extension, signal improvements, tie replacement
CTC Installation (Islands only)	\$30,000	N	P	TBD	Installation of Centralized Traffic Control north of Goleta
Capitan Siding Extension	\$15,000	N	P	TBD	Siding extension, signal improvements, tie replacement
Devon Siding Extension	\$15,000	N	P	TBD	Siding extension, signal improvements, tie replacement
Waldorf Siding Double Track	\$25,000	N	P	TBD	Siding extension and double track approximately 30 miles south of San Luis Obispo, signal improvements
<i>Santa Barbara County Subtotal</i>		\$125,000			
SAN LUIS OBISPO COUNTY					
Grover Beach Station Improvements	\$2,000	F	PE/ENV	TBD	Expand parking and establish/relocate motorcoach access
Centralized Traffic Control (CTC) Installation Extension	\$25,000	F	P	TBD	Extend CTC from Santa Margarita to Paso Robles consistent with the SDP for the Coast Daylight
Grover Beach Second Platform and Track	\$75,000	N	P	TBD	Platform and track improvements at Grover Beach Station
CTC Installation	\$30,000	N	P	TBD	Connect islands of CTC for continuous system from San Luis Obispo to San Diego
<i>San Luis Obispo County Subtotal</i>		\$132,000			
LOSSAN CORRIDOR TOTAL		\$5,366,000			

F=Full Funding; P=Partial Funding; N=No Funding

P=Planning; PE/ENV=Preliminary Engineering/Environmental Documentation; FD=Final Design; C=Construction

Figure 5.1 LOSSAN Corridorwide Capital Projects



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Funding Programs

As part of the LOSSAN Agency's ongoing capital improvement program, staff continues to both pursue and administer various funding programs available for the improvement of the facilities throughout the LOSSAN rail corridor. Below are the programs currently being utilized as part of this effort.

CalSTA Transit and Intercity Rail Capital Program: The Transit and Intercity Rail Capital Program was created to provide grants for capital improvements that modernize California's intercity, commuter, and urban rail systems. The goal of these improvements is the reduction of greenhouse gas emissions and vehicle miles travelled. As part of the 2016 grant cycle, LOSSAN Agency staff continues to work with partner agencies to develop a corridor-based application for funding.

California Office of Emergency Services – Transit Security Grant Program: The Highway Safety, Traffic Reduction, Air Quality, and Port Security Bond Act of 2006, approved by the voters as Proposition 1B (Prop 1B) in November 2006, authorized the issuance of \$19.9 billion in general obligation bonds for specified purposes, including grants for transit system safety, security, and disaster response projects. An element of Prop 1B is the California Transit Security Grant Program (CTSGP) – Intercity Passenger Rail/Commuter Rail Systems administered by the California Governor's Office of Emergency Services.

The CTSGP provides funding for capital projects that enhance protection against safety and security threats on select intercity passenger and commuter rail systems in California. Projects eligible for CTSGP funding are those designed to enhance the safety and security of stations, tunnels, or other facilities and equipment; the installation of explosive, chemical, biological, and radiological device mitigation/remediation equipment; and the installation of physical security enhancements.

Caltrans DRMT has been a recipient of CTSGP funds in prior years and has implemented projects along the LOSSAN rail corridor. Past projects have included the installation of video security equipment at various stations, improvement and replacement of platform lighting, and the installation of new crossing barriers and swing gates. The LOSSAN Agency is an eligible recipient of these grant funds, and receives approximately \$1.9 million per year in CTSGP funds. The current grant cycle is for FY 2015-16. Additional funding is also available from FY 2013-14 and FY 2014-15. The prior year funds were not allocated by Caltrans DRMT and can be allocated to projects that will meet the program specified expenditure deadlines.

The LOSSAN Agency has worked with member agencies to identify projects that can meet the program guidelines as well as the expenditure deadlines. The effort to maximize the available funding and identify the safety and security needs throughout the corridor continues.

Minor Projects: In addition to the major capital improvements funded by various sources as discussed above, the state annually sets aside an allocation of approximately \$500,000 to cover minor projects related to the Pacific Surfliner service. Projects funded under this program include station improvements, signage, and minor safety and security enhancements.

The LOSSAN Agency has worked with member agencies and station owners to prepare a prioritized list of candidate projects for this state-funded program. As part of that effort, staff has worked to maximize the funding available for customer service-focused improvements that enhance the passenger experience by utilizing other sources of funds to fill the immediate safety and security needs.

Proposed minor project lists for FY 2015-16 and FY 2016-17 will be developed and refined by LOSSAN Agency staff in coordination with Caltrans DRMT, Amtrak, and LOSSAN member agencies. The priority list of projects will be brought forward to the LOSSAN Board.

Chapter 6: Fare Policy

Current Fare Policy

Pacific Surfliner trains currently offer travel in unreserved coach class and reserved business class. If traveling in unreserved coach, passengers do not need to make an advanced reservation for a specific train, except during Thanksgiving weekend and select special events, when all seats on Pacific Surfliner trains are reserved. In business class, an advanced reservation needs to be made for a specific train, and the passenger is guaranteed a seat in the business class car at a premium charge of between \$10 and \$31, depending on the length of trip. In addition to a guaranteed seat, business class also provides additional leg room, and a free beverage, snack, newspaper, and service from a dedicated train attendant.

Ticket types available on the Pacific Surfliner include: one-way, roundtrip, 10-trip tickets, and monthly passes for unreserved coach. Roundtrip tickets are priced at twice the one-way fare. The 10-trip ticket is valid for ten one-way trips between a specific station pair within a 45-day period from date of first use, and these tickets can be shared among more than one passenger. Ten-trip tickets are priced at a substantial discount below one-way and roundtrip tickets, averaging between 40 percent and 42 percent less than the price of ten one-way tickets, and up to 55 percent off for some station pairs. Monthly tickets are valid for unlimited travel for an entire calendar month for the passenger named on the ticket.

Pacific Surfliner fares are largely static year-round and do not vary by day of week. However, fares do increase by a nominal amount on select holidays and during traditionally busy travel periods, including New Year’s Day, Easter weekend, Memorial Day weekend, Independence Day, Labor Day weekend, Thanksgiving, and Christmas week. In FFY 2014-15, approximately 63 percent of Pacific Surfliner passengers purchased tickets using Amtrak’s e-ticketing system online or through a mobile device. An example of current Pacific Surfliner fares for various ticket types is provided in Table 6.1.

Table 6.1: Example Pacific Surfliner Fares (as of 3/2016)

Station Pair	One-Way	Business Class	10-Trip	Monthly	Distance (miles)
Los Angeles – Irvine	\$18	\$28	\$111	\$333	46
Los Angeles – Oceanside	\$28	\$42	\$182	\$518	87
Los Angeles – San Diego	\$37	\$56	\$222	\$590	128
Los Angeles – Santa Barbara	\$31	\$47	\$180	\$558	103
Los Angeles – San Luis Obispo	\$41	\$62	\$240	\$590	222
Santa Barbara – San Luis Obispo	\$35	\$53	\$158	\$385	119
San Diego – Irvine	\$24	\$36	\$138	\$432	82

Source: Amtrak, 2016

The LOSSAN Agency has not implemented any fare changes since signing the ITA in June 2015. Table 6.2 summarizes past fare increases on the Pacific Surfliner.

Table 6.2: Historic Pacific Surfliner Fare Adjustments

Date	Increase
June 2003	3%
June 2004	3%
June 2005	5%
December 2005	5%
June 2006	5%
October 2006	5%
February 2009	N/A -- fare restructuring
February 2010	2%
June 2010	3%
June 2011	2%
September 2011	Seasonal fare change eliminated
August 2012	2%
June 2013	2%

Source: Amtrak, 2016

Discount Programs

In addition to discounted multi-ride tickets, Amtrak currently offers discounted Pacific Surfliner tickets to senior citizens age 62 and older (15 percent), the disabled (15 percent), children age 12 and under (50 percent), active military personnel and military veterans (10 percent), and members of the National Association of Railroad Passengers and Automobile Association of America (10 percent). Students from participating Southern California colleges and universities traveling on the Pacific Surfliner and San Joaquin routes are currently eligible to receive a 20 percent fare discount. Beginning in spring/summer 2016, Amtrak plans to introduce a national student discount program that will offer a 15 percent discount off “value” fares for students age 13 to 25 years old. This program will replace the existing Student Advantage and International Student Identity Card partnerships, which will be phased out.

Amtrak occasionally partners with local destinations and/or convention and visitors bureaus to offer special discounts for travel to a specific location. For example, the Santa Barbara and San Luis Obispo Car Free programs offer a 20 percent discount off Pacific Surfliner tickets for travel to stations in those counties, and the San Diego kids ride free program, which allowed one child age 2 to 15 years old to ride free with each adult rail fare purchased for travel to and from Oceanside, Old Town San Diego, and San Diego Downtown stations during the month of October 2015. Amtrak also offers a California rail pass, which offers travel on any seven days in a 21-day period on all three state-supported intercity routes in California, as well as the Coast Starlight and most Amtrak Thruway buses. When requested by the LOSSAN Agency, Amtrak can also offer special discounts to one-time events by directing passengers to a unique landing page on the Amtrak.com web site to purchase the discounted fare.

Amtrak offers a number of programs to incentivize group travel on the Pacific Surfliner. Groups of 15 or more can receive up to a 20 percent discount on regular fares on select trains based on projected seat inventory and season of travel. The Kids ‘n’ Trains program was established to provide reduced group fares for students and other youth groups traveling on the

Pacific Surfliner and San Joaquin routes. The original goal of the program was to increase ridership during off-peak periods. Today the program offers an educational opportunity for participants to discover, explore, and learn about popular destinations in California, including museums, zoos, and sites such as the San Juan Capistrano Mission or Olvera Street. The popularity of the Kids 'n' Trains program has increased steadily over the years. The program is available only Monday through Thursday on select trains, and provides a flat-rate fare of \$11 for a same-day roundtrip north of Los Angeles, and \$13 for a same-day roundtrip south of Los Angeles.

Rail 2 Rail Program

There are currently two distinct Rail 2 Rail programs in place that allow Metrolink and COASTER pass holders to ride Pacific Surfliner trains at no additional cost using their commuter rail tickets and/or monthly passes.

Metrolink: The Rail 2 Rail program allows Metrolink monthly pass holders who travel on Metrolink's Orange and Ventura County lines to travel on Pacific Surfliner trains within the station pairs of their pass at no additional charge, including on Saturday and Sunday. The Rail 2 Rail program does not apply to Metrolink one-way, roundtrip, and seven-day passes, except on two shared-service Pacific Surfliner trains (Amtrak 768 and Amtrak 761) on the Ventura County Line, and on all Pacific Surfliner trains between Los Angeles and Burbank Airport. Pacific Surfliner monthly pass holders may also ride any Metrolink train within the station pairs on their Amtrak monthly pass. Amtrak conductors scan the Metrolink passes and Metrolink is billed for each Rail 2 Rail boarding at an average reimbursement rate of \$2.54 per passenger. The contract for the Rail 2 Rail program expired in 2013. The LOSSAN Agency and Metrolink are currently in the process of negotiating a new Rail 2 Rail agreement. For FY 2015-16, the reimbursement rate was raised to \$4.50 per boarding, capped at the Metrolink budgeted line item for FY 2015-16 of \$1.4 million, pending further study to determine a more equitable reimbursement rate.

COASTER: COASTER currently has a modified Rail 2 Rail program agreement whereby COASTER passengers may travel on six select Pacific Surfliner trains using any COASTER fare media (monthly pass, RegionPlus day pass, one-way or roundtrip tickets). The six Pacific Surfliner trains that are part of the Rail 2 Rail program also make stops at all eight COASTER stations between Oceanside and Downtown San Diego. NCTD reimburses Amtrak \$4.28 for each passenger who rides one of these trains. Pacific Surfliner monthly pass holders and one-way and roundtrip ticket holders may also ride any COASTER train within the station pairs on their Amtrak ticket at no additional charge.

Potential Fare Policy Opportunities

In FY 2016-17, the LOSSAN Agency will work with Amtrak and Caltrans DRMT, utilizing consultant support if necessary, to examine options for adjusting the existing Pacific Surfliner fare policies to meet ridership demand and the uniform performance standards set by the state.

The recommended fare structure for FY 2016-17 and FY 2017-18 will be partially dependent on Amtrak's operating cost proposal for those FYs, which have not yet been received. In the past, Pacific Surfliner fares have generally been increased 2 to 3 percent annually to keep

pace with expenses. However, given increased vehicle fuel economy and lower gas prices, an across-the-board fare increase may not be prudent. In FY 2016-17, the LOSSAN Agency will work with Amtrak to explore opportunities to increase fare revenue while maintaining and expanding ridership, including:

- Work with Amtrak to study ridership and revenue impact of across-the-board fare increase of up to 2 percent.
- Consider adjusting monthly pass pricing to be more consistent with Metrolink and COASTER fares for similar station pairs.
- Consider adjusting deep discounts on 10-trip tickets or restricting them to use by only one passenger.
- Develop a discounted ticket for smaller groups similar to programs in place on Capitol Corridor and Downeaster
- Explore the possibility of maintaining unreserved service, but increasing fares by a modest amount on higher demand days (Friday, Saturday, and Sunday) during peak seasons in order to manage demand, similar to what is currently done on holidays.
- Implement the Pacific Surfliner Transit Transfer Program, which will allow Pacific Surfliner passengers to make seamless connections to local transit services, including service to all major airports along the Pacific Surfliner route.
- Increase public awareness of existing discount programs, especially college, group, and school discounts.
- Reevaluate the existing college discount program and consider offering a modified multi-ride pass similar to the six-ride Downeaster College Pass offered on Amtrak's Downeaster trains between Boston and Maine, which is valid for a 365-day period.
- Work with cities, chambers of commerce, and convention/visitors bureaus along the Pacific Surfliner route to offer special discounts and packages for Pacific Surfliner passengers, similar to the successful Car-Free Santa Barbara program.
- Expand partnerships with the San Diego Chargers, San Diego Padres, Del Mar Racetrack, Los Angeles Angels of Anaheim, Anaheim Ducks, Los Angeles Rams, and other event organizers to promote taking the Pacific Surfliner to sporting events, concerts, and other special events at venues served by the Pacific Surfliner.
- Enhance customer loyalty and referral programs, including Amtrak Guest Rewards program, to retain existing and attract new riders.

The LOSSAN Agency will work with Amtrak and the state to determine the impacts of any revised pricing policy and determine if a fare change is required. Any proposed fare increases will be brought to the LOSSAN TAC and Board for review and approval prior to being implemented.

Chapter 7: Network Integration and High-Speed Rail

The LOSSAN Agency is working in close coordination with CalSTA, Caltrans DRMT, operators along the LOSSAN rail corridor, and others on efforts to improve rail and transit service, and grow ridership by creating an integrated statewide rail and transit systems with coordinated schedules and common fare collection systems. Creation of better-integrated rail and transit systems will provide additional options for travelers travel throughout the state, seamlessly transferring from service to service to reach their desired destinations.

CalSTA is continuing efforts to develop a statewide Network Integration Strategic Service Plan for the California Passenger Rail Network. This plan will incorporate transit, commuter rail, intercity rail, and the phased implementation of high-speed rail (HSR). A component of that effort has been the network integration work completed for the Los Angeles to San Diego segment of the LOSSAN rail corridor. Using consultant resources, a thorough review and analysis of the integration among the existing services and the infrastructure has been completed, resulting in the planned implementation of the “robust timetable” discussed in the operating plan chapter. In FY 2016-17 the LOSSAN Agency will build off of this work and seek funding to complete a similar effort for the Los Angeles – San Luis Obispo segment of the LOSSAN rail corridor; laying the foundation for a complete review of the corridor for both operating improvements and efficiencies utilizing the existing infrastructure as well as opportunities based on incremental capital improvements.

The LOSSAN Agency has already undertaken a number of efforts to improve integration along the rail corridor, and future improvements to the Pacific Surfliner service will play a key role in the larger statewide effort. Partnerships currently exist between the Pacific Surfliner and the two commuter railroad operators in the rail corridor: Metrolink and COASTER. Integration efforts currently include coordinated schedule and timetable changes, and the Rail 2 Rail program. Additionally, the LOSSAN Agency will implement the Pacific Surfliner Transit Transfer Pass program in summer 2016, providing seamless transfers to 12 local public transit services along the LOSSAN rail corridor and creating more convenient first- and last-mile connections.

The Amtrak-operated Thruway bus service also provides key connections and is coordinated with the San Joaquin and Capitol Corridor intercity rail services, providing connectivity to the statewide rail system. In the FY 2016-17 the LOSSAN Agency will work in coordination with SJJPA and Amtrak to review the operations of the Thruway bus service and look for opportunities to improve the connectivity and efficiency as well as opportunities to serve currently unserved key areas along the routes. Pacific Surfliner trains also provide timed connections in Los Angeles to three Amtrak long-distance trains serving destinations, including Chicago, New Orleans, Portland, and Seattle.

HSR Connection

The planned HSR system is an integral component of the statewide rail system. Integration with the HSR system will be key to the statewide network integration effort. The passenger rail services along the LOSSAN rail corridor serve as a backbone for transportation throughout the central and Southern California coastal regions. As such, the LOSSAN rail corridor will provide critical connections to support and compliment the HSR system. Integration between the

LOSSAN rail corridor and HSR system will provide mutual benefits to each service and must be planned carefully to build upon the existing success of the Pacific Surfliner service.

The CHSRA released its Draft 2016 Business Plan in February 2016, announcing the decision to build the initial operating segment between the Central Valley to Silicon Valley, which is planned to be operational by 2025. This change in implementation will provide additional time for technical issues to be further analyzed and resolved prior to building the connection from the Central Valley to Burbank, Los Angeles, and Anaheim. Recognizing the interregional importance of the Burbank to Anaheim segment, and the need to make strategic investments that will help link the rail systems together over time, the CHSRA and the LOSSAN Agency are continuing efforts to coordinate planning efforts and evaluation of investments in the LOSSAN rail corridor.

The Draft 2016 Business Plan anticipates that the full Phase 1 HSR system between San Francisco, Los Angeles and Anaheim will be operational by 2029. Phase 2 of the project will ultimately extend HSR from Los Angeles to San Diego via an inland route, providing improved travel times, and changing the role of the Pacific Surfliner into more of a feeder route to HSR, particularly for coastal communities in Orange and San Diego counties.

The LOSSAN Agency is represented well with CHSRA, as four of the member agencies are active participants of the Southern California Regional Rail Partners working group, including the LOSSAN managing agency. The CHSRA Southern California Regional Director is also an ex-officio member of the LOSSAN Board.

Chapter 8: Passenger Amenities

In order to continually improve upon Pacific Surfliner passenger service, the LOSSAN Agency has outlined strategies for enhancing passenger amenities and improving the overall travel experience. This chapter focuses specifically on enhancements to passenger services and amenities that can be prioritized for FY 2016-17 and FY 2017-18. Due to the delay in signing a Pacific Surfliner operating agreement with Amtrak for FFY 2015-16, a number of initiatives initially planned for implementation beginning in FY 2015-16 have been delayed.

Key Priorities for FY 2016-17 and FY 2017-18

On-Board Amenities

Bicycle Storage: A reservation system was implemented in June 2013 that has resolved some bicycle overcrowding issues; however, there are still requests for an expansion of bicycle storage beyond the seven spaces currently available on most Pacific Surfliner train sets in the lower level of the cab car. LOSSAN Agency staff will work with Amtrak to explore opportunities to introduce additional bike storage in the cab car or in a modified Superliner coach car.

Business Class: Business class is a popular service on the Pacific Surfliner and currently provides a guaranteed seat with increased leg room, morning self-serve coffee, tea and pastries, and afternoon at-seat snack and beverage service, as well as a dedicated business class attendant on most trains. LOSSAN Agency staff will work with Amtrak to further enhance the amenities offered in business class in a cost effective manner, potentially including upgraded seat coverings and expanded at-seat food and beverage service. Additionally, the LOSSAN Agency will explore opportunities to expand the business class service capacity on select trains.

Food and Beverage: In FY 2015-16, LOSSAN Agency staff began to work with Amtrak to evaluate existing food and beverage service based on sales and revenue data, and implemented a menu “refresh” to update fresh food items and prices. LOSSAN Agency staff will continue to work with Amtrak to explore opportunities to offer more locally sourced products, particularly fresh food and beer and wine, with the goal of improving Customer Service Index scores for food service while maximizing revenue. The LOSSAN Agency will consider special events to allow a select focus group of riders to sample potential menu items.

Joint Promotions: LOSSAN Agency staff will work through the existing LOSSAN Corridor Joint Marketing Group, which includes representatives from each LOSSAN member agency, to better coordinate and leverage marketing resources at Amtrak and member agencies, including consideration for pooling resources. Staff will develop a coordinated marketing effort among all corridor public transit agencies, as well as businesses, universities, and key attractions along the corridor, to promote travel on the Pacific Surfliner. Joint promotions with Metrolink and COASTER will also be explored.

Newsletter: LOSSAN Agency staff will develop a newsletter that will be made available via e-mail blast, including service-related information, passenger comments and questions, and information on upcoming events and promotions, as well as a column from the

Managing Director. The newsletter could highlight a different “weekend getaway” each issue, including information on destination deals and partnerships.

On-Board Information System: LOSSAN Agency staff will continue to work closely with Amtrak and Caltrans DRMT on the implementation of the On-Board Information System (OBIS) project. The state-funded OBIS project will provide automated audio and visual messages onboard Pacific Surfliner trains, including information on next stop, delays, food service, connecting transit, and safety/security-related messages.

On-Board Transit Pass Sales: Discounted, prepaid one-day passes for the Metro and SDMTS rail systems will be sold in the café car to allow convenient connectivity with larger transit systems where an embedded transit transfer is not feasible.

Rail 2 Rail Program: LOSSAN Agency staff will continue to work with Amtrak, Metrolink, and NCTD to offer a Rail 2 Rail program benefit to customers that provides an equitable reimbursement rate to Amtrak for carrying Metrolink and COASTER pass holders on state-funded intercity trains.

Service Disruptions: LOSSAN Agency staff will work proactively with Amtrak to improve communication with passengers in the event of an unplanned track closure or service disruption, including preparation of after-action reports for major incidents, and follow-up letters to passengers after major delays explaining the cause of the delay and acknowledging the inconvenience they experienced.

Special Event Service: LOSSAN Agency staff will work with Amtrak to expand Pacific Surfliner service to special events that draw large crowds and are not well served by Metrolink or COASTER, while also ensuring that appropriate resources (rolling stock, staffing, etc.) are made available to accommodate anticipated demand.

Train Status Information: Amtrak currently provides train status information through a number of channels, including announcements at staffed stations, Passenger Information Display System signs on station platforms, and online through the “train status” feature on its web site and mobile app. The LOSSAN Agency will promote the Amtrak mobile app as a convenient way to access train status information, but also improve the reliability of messages provided through Twitter and Facebook, which can supply more detailed information in the event of service disruptions. LOSSAN Agency staff will also ensure that Metrolink and COASTER passenger information signs are capable of displaying delay information for Amtrak trains.

Transit Connectivity: The Pacific Surfliner Transit Transfer Program will be implemented in summer 2016, offering seamless connectivity to more than 12 local public transit services along the LOSSAN rail corridor. LOSSAN Agency staff will also work with local transit providers to improve timed transfers to Pacific Surfliner trains, including connectivity to airports along the route.

Wi-Fi: All Pacific Surfliner trains currently offer Wi-Fi service, which has proven to be a popular passenger amenity. However, due to limited bandwidth, the service has some limitations. LOSSAN Agency staff will work with Amtrak and Caltrans DRMT to build on the success of the existing Wi-Fi service by improving the speed and reliability of the service.

Wi-Fi Landing Page: LOSSAN Agency staff has initiated discussions with Amtrak on updates to the existing landing page that passengers see when logging onto Amtrak Connect Wi-Fi onboard Pacific Surfliner trains. The new landing page will include real-time route and station information, information about onboard amenities, links to Pacific Surfliner social media pages, and access to destination deals and news.

Station Amenities

Checked Baggage: LOSSAN Agency staff will work with Amtrak to monitor the use of checked baggage service, as well as the impacts on operating costs and station dwell times of continuing to offer this service. Though some passengers using Pacific Surfliner trains prefer a checked baggage option, especially those connecting to Amtrak long-distance trains and Amtrak Thruway buses, most Amtrak intercity trains do not offer checked baggage service, even those that travel similar distances and connect to other Amtrak long-distance trains such as the Acela Express, Northeast Regional, and Midwest corridor trains.

Station Improvements: Using previous studies and input from member agencies and station owners, compile a list of prioritized capital projects at stations that could be candidates for minor capital program funds, as well as state and federal safety/security funds. A corridorwide call for projects with a small local match requirement could provide an incentive for station owners, including cities and local transportation agencies, to prioritize funding for station and platform improvements.

Chapter 9: Equipment

Existing Conditions

Amtrak currently operates 23 daily Pacific Surfliner trains using nine separate train sets. Each train set generally consists of one locomotive and six cars, including one business class car, one café car, three coach cars, and one cab/baggage car. Additional cars are sometimes added to accommodate projected demand associated with holidays and special events. A description of the types of cars currently used to provide Pacific Surfliner service is provided in Table 9.1.

Table 9.1: Pacific Surfliner Fleet Description

Type	Car Description	Seating Capacity
Business Class	Reserved seating on upper and lower levels with dedicated attendant; complimentary at-seat snack and beverage service	74
Café	Regular coach seating on upper level; booth seating and café area with food and beverage service on lower level	72
Coach	Unreserved seating on upper level with limited seating for seniors/disabled on lower level	90
Cab/Baggage	Unreserved seating on upper level and cab area for engineer to operate train; limited senior/disabled seating, bike rack accommodating seven bikes and secured area for storage of checked baggage on lower level	82

Unlike the Capitol Corridor and San Joaquin services, where nearly all of the locomotives and passenger cars are owned by Caltrans, Caltrans owns only ten of the 49 bi-level cars dedicated to the Pacific Surfliner service, which were originally delivered in 2001 and 2002. The remaining 39 cars and all locomotives used to operate Pacific Surfliner are owned by Amtrak, with Caltrans DRMT continuing to pay the capital equipment charges and lease fees to use the Amtrak equipment through a separate agreement outside of the operating contract between Amtrak and the LOSSAN Agency.

In addition to the 49 Pacific Surfliner-branded bi-level cars, Caltrans leases approximately eight Amtrak-owned bi-level Superliner coach and coach-baggage cars. These cars are typically used on Amtrak’s long-distance trains, but have been modified to run in “push-pull” operation and have been equipped to support the Wi-Fi service offered on Pacific Surfliner trains.

Caltrans also leases a trainset composed of Amtrak-owned single-level Amfleet and Horizon cars, as well as a Non-Powered Control Unit, a non-powered locomotive that carries baggage and acts as a cab car. This trainset is typically assigned to less busy trains, as it does not have automatic doors, which requires conductors to manually open and close doors at each stop, and requires passengers to climb several steps to board the train, which can increase

station dwell times. Of the nine trainsets used to operate Pacific Surfliner service, eight currently consist of bi-level Surfliner and Superliner cars, and one consists of single-level Amfleet and Horizon cars.

Pacific Surfliner trains typically operate with a single 3,000 horsepower (HP) Amtrak-owned F59-PHI locomotive, though Amtrak sometimes substitutes a 4,250 HP P-42 locomotive that is usually used on its long-distance trains. The 15 F59-PHI locomotives based in Los Angeles and assigned to the Pacific Surfliner service were originally delivered in 1998, and all have in excess of 1.6 million miles. Approximately 80 percent of the F59-PHI locomotive fleet has received a major mid-life overhaul, which included upgrading the engine to Tier 0+ emissions standards.

New Equipment Purchases

In December 2011, the California Transportation Commission (CTC) approved the allocation of \$42 million of Proposition 1B funds as a local match to \$168 million in federal funds received by Caltrans through the High-Speed Intercity and Passenger Rail competitive grant program to procure new rolling stock for California’s three state-supported intercity rail services. In November 2012, Caltrans awarded a contract to Nippon Sharyo, and prime contractor Sumitomo Corporation of America, to build 42 railcars for the state’s three intercity rail corridors at a factory in Rochelle, Illinois. Caltrans executed the contract as the lead agency in a joint agreement with the Illinois Department of Transportation (IDOT), which is representing a Midwest Coalition for the states of Illinois, Michigan, and Missouri, for a total base order of 130 railcars, with options to purchase an additional 300 railcars, which can be exercised through 2021.

Due to lower than expected pricing on the railcars, Caltrans plans to purchase an additional 11 railcars, for a total of 53, using the original allocation of state and federal grant funds. Of the 53 railcars being delivered to California, 28 will be used in Pacific Surfliner service. A number of delays have been experienced in the production of the new railcars, which are now expected to be delivered beginning in late 2018 through 2020. The railcars will be used to replace leased Amtrak Superliner, Horizon, and Amfleet railcars, as well as to add capacity to existing trains. A summary of the types of new railcars ordered and their planned use is included in Table 9.2.

Table 9.2: Planned Use of Nippon Sharyo Railcars on Pacific Surfliner

Car Type	Quantity to Replace Leased Amtrak Cars	Quantity to Provide Additional Capacity	Total	Cost per Car (per contract)
Bi-Level Coach	14	10	24	\$2.7 million
Bi-Level Cab Car	2	0	2	\$2.9 million
Bi-Level Café	2	0	2	\$2.9 million
TOTAL	18	10	28	

Source: Caltrans, 2014

In March 2014, Caltrans, in coordination with the IDOT, awarded a contract to Siemens to manufacture a total of 35 diesel-electric locomotives in Sacramento, with six locomotives

purchased for use in California on the Capitol and San Joaquin corridors planned for delivery in late 2016. The remainder of the 4,400 HP, Tier 4 diesel-electric locomotives will be purchased by other states, including Illinois, Iowa, Michigan, Missouri, and Washington. The contract with Siemens includes options for an additional 225 locomotives.

In December 2014, the CTC approved the allocation of \$108 million in unallocated Proposition 1B intercity rail funds for procurement of new intercity locomotives and railcars, and to implement an on-board information system on the state’s intercity rail services, including the Pacific Surfliner. A portion of the \$108 million will be used to purchase additional Tier 4 locomotives to replace the 15 F59-PHI locomotives owned by Amtrak that support the Pacific Surfliner service. Replacing the Amtrak-owned locomotives, which are more than 15 years old with new, state-owned Tier 4 locomotives would have a number of benefits, including reduced lease costs and capital equipment charges for use of Amtrak-owned equipment, improved reliability and reduced mechanical-related delays, and environmental benefits through reduced emissions from cleaner-burning Tier 4 engine. The new locomotives are currently expected to be delivered and put into service on the Pacific Surfliner beginning in 2018-2019.

The LOSSAN Agency has initiated conversations with Amtrak and Caltrans DRMT regarding options to procure additional leased equipment for the Pacific Surfliner route prior to the arrival of the new state-owned railcars in 2018 to help accommodate peak travel demand, particularly during the summer season and holidays, which results in crush loads and standee conditions on numerous Pacific Surfliner trains.

Table 9.3: State-Owned Pacific Surfliner Equipment

	Current		2020	
	Owned	Leased from Amtrak	Owned	Leased from Amtrak
Cab Car	3	8	5	8
Coach	3	15	27	15
Business Class	2	8	2	8
Café	2	8	4	8
Superliner Coach and Coach/Baggage	0	9	0	0
Amfleet/Horizon	0	9	0	0
F59 Locomotives	0	15	15	0
TOTAL	10	72	53	39

Source: Caltrans and Amtrak, 2014

*Separate business class railcars will not be produced as part of the new railcar order, but rather coach railcars built with the flexibility to have a business class module installed, including a refreshment station and increased pitch between seats

Note: 2020 service assumes all cars and locomotives ordered by the state have been delivered, and operation of nine daily trainsets, using a seven-car standard set

LOSSAN Agency staff will work through the state-wide working group to explore options for initial deployment of new equipment to the Pacific Surfliner service, and will continue to work with

Caltrans DRMT and CalSTA to explore opportunities to improve cost efficiency related to the existing lease of Amtrak-owned railcars for the Pacific Surfliner service, while also planning for future service needs for the Pacific Surfliner as well as emerging corridors like the Coast Daylight, Santa Barbara to Ventura peak-period service, and Coachella Valley service. This could include lease or purchase of Talgo equipment originally manufactured for the State of Wisconsin, the purchase of the 39 bi-level Surfliner railcars currently owned by Amtrak, or the purchase of additional bi-level Nippon Sharyo railcars to replace all or a portion of the Amtrak-owned railcars used on the Pacific Surfliner.

Equipment Maintenance

The primary maintenance facility for all Pacific Surfliner rolling stock is Amtrak's Redondo Locomotive Maintenance Facility in downtown Los Angeles. This facility includes locomotive and vehicle repair shops that performs safety inspections, servicing, and maintenance of all Amtrak locomotives and rolling stock. Amtrak utilizes a smaller servicing facility in Goleta for fueling, cleaning, and overnight train inspections. In San Diego and San Luis Obispo, overnight layover facilities for the Pacific Surfliner have been established to allow for fueling, overnight inspections, and cleaning. In San Diego, these are performed at the Santa Fe Depot, while in San Luis Obispo, the Pacific Surfliner trainset is stored on a designated layover track adjacent to the UPRR locomotive yard across from the San Luis Obispo station. Both the Los Angeles and Goleta maintenance facilities are owned by Amtrak.

Amtrak staff is responsible for all maintenance activities related to the Pacific Surfliner service as part of the annual operating contract with the LOSSAN Agency. The LOSSAN Agency is responsible for administration and maintenance supervision of the Pacific Surfliner fleet, particularly the ten state-owned railcars. This relationship is further defined in the Equipment Lease Agreement between Caltrans DRMT and the LOSSAN Agency, which is included as an appendix to the ITA. The LOSSAN Agency is also responsible for ensuring the Pacific Surfliner fleet is operated and maintained to the high standards of reliability, cleanliness, and safety set by Amtrak and the state on a day-to-day basis. LOSSAN Agency staff will continue to work closely with Caltrans DRMT and Amtrak to refine the maintenance and operations programs to improve the reliability, safety, and the cost-effectiveness of the fleet.

Caltrans DRMT will continue to oversee overhaul, wreck repair, warranty work, and major and minor modifications made to state-owned rolling stock in close coordination with LOSSAN Agency staff. In addition, Caltrans DRMT is responsible for statewide fleet planning, establishment of uniform statewide equipment standards, and deployment of equipment between the three state-supported intercity rail corridors (Pacific Surfliner, Capitol Corridor, San Joaquin) in consultation with staff from each corridor.

Amtrak Thruway Bus Service

Amtrak contracts with private bus companies to provide Amtrak Thruway bus service connecting to the Pacific Surfliner route, and the private bus operators provide the vehicles used in the service, which must comply with Amtrak requirements, including Wi-Fi accessibility, electronic destination signs, a restroom, and outlets.

Chapter 10: Marketing

Background

The LOSSAN Agency business plan for FY 2015-16 and FY 2016-17, which was approved in June 2015, outlined key market analysis findings, potential target markets, and marketing strategies and programs designed to increase awareness, enhance perception, and encourage new ridership on Pacific Surfliner service. Since that time, a number of marketing initiatives have been implemented consistent with the prior LOSSAN Agency business plan, including a Pacific Surfliner winter marketing campaign that launched in December 2015. This chapter provides a review of existing marketing efforts and results, which provide insights that will help shape the development of an effective and integrated Pacific Surfliner marketing program for FY 2016-17.

The marketing initiatives implemented to promote the Pacific Surfliner service since July 2015 include:

- Worked with Amtrak to create co-branded logo that can be used on joint promotions
- Developed and launched a multi-channel advertising campaign –“Your Formula for Fun”
 - More than 12,000 customers responded to the campaign by entering the sweepstakes (January-February 2016); 60 percent opted in to receive future e-mails from the LOSSAN Agency
 - 50 percent had never ridden the Pacific Surfliner
 - 34 percent ride infrequently
 - 11 percent used to ride
 - 4 percent currently ride
 - Respondent demographics by media consumption
 - YouTube – male-dominated (65 percent); more than 50 percent age 18-34
 - Facebook Paid and Organic Ads – female-dominated (63 percent); 60 percent age 25-54
 - Google Display Ads (ads on cbslocal.com, latimes.com, usmagazine.com, priceline.com etc.) – 48 percent age 35-65+
- Created a new, Pacific Surfliner website at www.pacificsurfliner.com
 - 156,000 page views and 66,860 unique page views (January-March 2016)
 - 42 percent of visits generated from social media and 34 percent from paid search
- Initiated a new, branded Facebook Page at www.facebook.com/pacificsurfliner
 - More than 7,300 fans (January-March 2016).
- Developed strategic partnerships with convention and visitor organizations along the LOSSAN rail corridor and secured six free vacation packages valued at more than \$4,000 as sweepstakes prizes tied to the Pacific Surfliner winter marketing campaign.
- Produced six destination videos by county and one 30-second television spot, generating a total of 100,000 views during January and February 2016.

- Produced a rack card distributed at all Pacific Surfliner stations, on-board trains, and to strategic partners promoting the Pacific Surfliner brand, website, and destinations along the route
- Created a pocket guide to educate the general public about Pacific Surfliner service.

Follow-up surveys to respondents to the winter marketing campaign will be conducted to further nurture relationships, convert non-riders to riders, track behavior changes, and provide relevant, customized content for each individual. The analytics discussed above present the following insights:

- All age groups responded strongly to the campaign message while showing variance in online media consumption
- Simple vacation packages via the Pacific Surfliner are successful in attracting non-riders
- Content-rich videos are effective ways to engage
- Free prizes and incentives work to draw in prospective riders
- Organic social media posts are effective in creating awareness and interests through viral effect
- Each online paid media has its unique strength shown from campaign analytics:
 - Facebook - customer acquisition and engagement
 - YouTube - generating awareness and enhancing perception
 - Google Search - reach in-market individuals who are researching train travel
 - Display ads - reengaging individuals who visited the website but did not take action

Traveling to some of the best destinations in California with superior on-board amenities and scenic views, the Pacific Surfliner has great potential to be even more widely used than it is today. The LOSSAN Agency has an opportunity to help position the Pacific Surfliner as an outstanding transportation alternative for many types of travelers. The FY 2016-17 marketing plan expands on the strategies discussed in the FY 2015-16 plan to include additional actions designed to penetrate each individual target market utilizing a “4P” approach (product, pricing, promotion, and place), and incorporating the insights listed above.

Target Audiences/Marketing Personas

One size never fits all in the marketing world. Every target market should be carefully defined and managed by creating marketing personas with demographic, socioeconomic, and psychographic attributes. Having a deep understanding of potential customers is critical to driving content creation, product and pricing development, and strategies related to customer acquisition and retention. Based on current available data regarding potential Pacific Surfliner riders, the following personas have been identified:

- *Geographic attribute*: – people who live, work, or attend schools located within a 15-mile radius of a Pacific Surfliner station along the LOSSAN rail corridor.

- *Demographic attributes:*

- Age 18-24 – College Students

- Age 25-34 – Young adults

- Age 35-44 – Family travelers with kids

- Age 45-54 – Middle-age

- Age 55-64 – Mature travelers

- Age 65+ - Retired travelers

In addition to attracting new customers, this plan also targets existing customers to increase loyalty, stimulate more frequent usage, and encourage referrals and “word of mouth” advertising.

Marketing Goals

- Increase awareness about Pacific Surfliner by 10 percent among people living within a 15-mile radius of Pacific Surfliner stations
- Increase interest in riding Pacific Surfliner among targeted non-users
- Increase frequency of usage among current riders by 5 percent
- Increase annual ridership and fare revenue by 2 percent

Marketing Strategies Matrix by Persona

Persona	Product	Pricing	Promotion	Place (Distribution)
College Students Age 18 -24 Active Life style Attend colleges along the LOSSAN rail corridor	Convenient schedules to/from school including first/last mile connections	Straight discounted fare i.e. 15 percent off regular fare	“Buddy Pass” Buy one round trip and get the second half off.	Sell through schools
	Trips to special events, sports, concerts	Branded multiple round-trips deal i.e., “Take Five” for fixed price	Social Media • Instagram • Snap chat • Facebook Targeted online ads	Mobile/web ticketing
	Wi-Fi, café car, bike reservations, mobile app	Partner with interested schools for special pass	Onsite school promotion/ announcements	Contiki travel agency targeting millennial for leisure trips
Persona	Product	Pricing	Promotion	Place (Distribution)
Young Adults Age 25 – 34 Social/dating Adventure seeking Looking for shared experiences Meeting new people	Weekend get-away package for romantic adventures, including wine tasting, kayaking, hiking, etc.	Weekend getaway package deals (with discounted tickets)	Introduce monthly deal of discounted getaway packages	Contiki, Meetup groups
	Special event (birthday, bachelorette), alumni train, encourage group travel	Small group discounts, 10 rides	Social Media • Instagram • Snap chat • Facebook • YouTube • Pinterest Targeted e-mail ESPN HULU	Mobile/web ticketing
	Wi-Fi, Café Car with alcohol served, attractive destinations	Partner with destinations to include package with activities		Social groups, sports groups alumni associations

Persona	Product	Pricing	Promotion	Place (Distribution)
<p>Age 35-44</p> <p>Have young kids who don't like to sit in traffic</p> <p>Tired of driving kids around</p> <p>Want quality family time</p>	Family weekend getaways including kid-friendly destinations i.e. Disneyland, Legoland, beach, zoos, museums etc.	Kids ride free (12 and under) in non-peak seasons	<p>Promote themed weekend trips – cultural, adventure, sightseeing</p> <p>Summer/Winter Sweepstakes</p>	Costco Target Walmart grocery stores
	Not tied to seat; space to play games, “cool views”, fund/educational destinations	Destination deals -- kids eat or stay free	<p>Social Media</p> <ul style="list-style-type: none"> Facebook Instagram <p>Display Ads Blog influencers</p>	Mobile/web ticketing
	Wi-Fi, café car, space for luggage, stroller		Family-oriented media channels	Priceline.com Groupon

Persona	Product	Pricing	Promotion	Place (Distribution)
<p>Middle-agers</p> <p>Age 45 - 54</p> <p>Have grown-ups</p> <p>Have more me time</p> <p>Look for new adventures</p> <p>Re-connect with friends</p>	Weekend getaway package for romantic adventures, including wine tasting, kayaking, hiking, sightseeing etc.	<p>“Friends & Family Discounts”</p> <p>4+ - 10 percent off</p> <p>8+ - 20percent off</p> <p>12+ - 30 percent off</p>	<p>Conduct online promotion with free package and group tour sweepstakes.</p> <p>Work with travel bloggers and media to create buzz about the winning groups.</p>	Costco, other retailers Partnering with travel agents
	Design group travel tour (2 or 3 days) with specific itineraries	Group travel package deals with discounted train tickets	<p>Social Media</p> <ul style="list-style-type: none"> Facebook <p>Display Ads Email Travel magazines Local cable Local news</p>	Mobile/web ticketing
	Wi-Fi, café car			Priceline.com Groupon

Persona	Product	Pricing	Promotion	Place (Distribution)
Mature & Retired travelers Age 55 + Have more and flexible time	Create multi-stop, multi-day travel packages with mature travelers-friendly destinations/ activities	“Leave Thursday Back Monday’ Saver Discounts	Direct mail Newspaper ads Senior publications Cable television	Senior organizations like AARP Travel shows AAA
	Nostalgic for train travel experienced as a child	Senior discounts	Social Media • Facebook Display Ads E-mail	Priceline.com Senior-oriented travel agencies
	Wi-Fi, Café Car, comfortable seating, no driving, unique, scenic views			Online

Marketing Tactics

To implement the strategies outlined above, specific tactics will be created and utilized with the support of the LOSSAN Agency’s marketing firm. These will include:

- Continue to build Pacific Surfliner brand equity through all on/offline materials
- Create scalable travel posters for each destination and attraction along the Pacific Surfliner corridor that can be displayed at stations, travel agencies, senior centers, etc.
- Develop partnerships with visitors bureaus, travel agencies (on and offline), schools, universities, hotels, local attractions, retailers etc.
- Produce video vignettes highlighting top destinations and on-board amenities
- Develop and maintain a top-notch, customer-oriented website
- Develop and maintain customer profiles and a contact database using state-of-the-art marketing automation and customer relation management digital tools
- Constantly update and grow social media platforms, including Facebook, Instagram, Twitter, YouTube, etc.
- Distribute e-Newsletters with personalized and relevant content as well as special offers to grow customer loyalty
- Create and publish a Pacific Surfliner marketing calendar to include special events, fairs, etc., from each station city
- Work with member agencies and local partners on cross-promotional opportunities
- Conduct market and customer research when necessary, and closely review results of on-board surveys completed by Amtrak and Caltrans DRMT

The tactics discussed above will be further expanded upon in a comprehensive marketing plan that will be developed by LOSSAN Agency marketing staff in coordination with the LOSSAN Agency marketing firm. The LOSSAN Agency will also have access to the services professional videography and website development firms to assist with the implementation of the Pacific Surfliner marketing plan.

Performance Measures and Reports

It is essential to analyze and improve the efficiency and effectiveness of marketing efforts by focusing on the alignment of marketing activities, strategies, and metrics with business goals. All Pacific Surfliner marketing activities and expenditures will start with clear objectives and metrics to be measured against appropriate data generated at the end of the marketing campaigns. Results from all marketing programs and advertising campaigns will be monitored and analyzed on an ongoing basis. Metrics to be measured include web traffic, video views, response rate, revenue, and ridership. Monthly marketing analytics reports will be submitted for management review in addition to final campaign reports.

Chapter 11: Annual Funding and Separation of Funding

The annual funding process for the three state-supported intercity passenger rail corridors begins with Caltrans DRMT making an initial request for funding to be included in the state’s FY budget. Once the budget is approved and funds have been included for the service, CalSTA will have responsibility for allocating the funds to each of the three intercity rail corridors. Simultaneously with the budget process, the LOSSAN Agency will begin negotiating with Amtrak for the annual operating and maintenance contract, which is currently on a FFY basis (October – September). The Amtrak contract should be executed by September of each year to ensure continued and seamless operations at the beginning of each FFY. Annually, the LOSSAN Agency will provide a budget for the continued administration, marketing, and operations of the Pacific Surfliner to the LOSSAN Board for review and approval. This budget will also be included in the annual update to the business plan for review and approval by the Secretary of CalSTA by April 1 of each year.

Table 11.1: Annual State Funding Allocation for Pacific Surfliner Operations

FY 2012-13 (allocation)	FY 2013-14 (allocation)	FY 2014-15 (allocation)	FY 2015-16 (allocation)
\$29,423,000	\$36,819,000	\$44,287,000	\$46,581,156

Source: Caltrans

State funding for operations of all three intercity rail corridors is provided through the Public Transportation Account, which is funded primarily through the state sales tax on diesel fuel. The increase in annual state funding in FY 2013-14 and FY 2014-15 is due in part to the increased costs absorbed by the state per the provisions of PRIIA Section 209, which eliminated Amtrak’s 30 percent share of Pacific Surfliner operating costs and passed on additional capital equipment charges for use of Amtrak-owned equipment that the state had not previously funded.

FFY 2016-17 and FFY 2017-18 Amtrak Operating Budget

The current assumptions for the FFY 2016-17 operating budget include the addition of a 12th daily roundtrip between Los Angeles and San Diego. The budget also includes a modest increase in both ridership and revenue of 2 percent over the FFY 2015-16 budget. Total operating costs for the Pacific Surfliner service are projected to be \$118,404,876, an increase of \$6,985,182, or 6.3 percent over the FFY 2015-16 budget. Caltrans DRMT has executed an agreement with Amtrak to directly fund equipment capital charges for the Amtrak-owned railcars and locomotives used on the three state-supported rail corridors, effective October 2015. As a result, equipment capital charges are not included in the operating agreement between Amtrak and the LOSSAN Agency. After subtracting projected fare revenue of \$78,835,800, the total FFY 2016-17 state operating subsidy payment is projected to be \$39,569,076. This is a significant decrease from the FY 2015-16 budgeted operating subsidy of \$46,581,156, mainly due to the state directly funding equipment capital charges. The FY 2016-17 budget includes \$300,000 for the replacement of up to 23 Quik-Trak ticketing kiosks, as the current kiosks have reached the end of their useful life. The budget also includes \$500,000 for minor projects, including station improvements, signage, and minor safety and security enhancements. The minor projects budget is consistent with the FY 2015-16 allocation.

The FFY 2017-18 operating budgets have not yet been made available; however, based on the work done by the state and Amtrak in developing the FFY 2015-16 operating agreement and transitioning to an actual cost-based contract, LOSSAN Agency staff estimates an increase in the state-required subsidy for the FFY 2017-18 operating contract of approximately 3 percent, resulting in an operating subsidy of \$41,271,148.

CalSTA is currently working with the LOSSAN Agency on modeling studies related to retiming of Pacific Surfliner trains to provide peak-period service between Ventura and Santa Barbara, which will likely impact operating cost and fare revenue projections. However, this modeling has yet been finalized, therefore the expected impacts on the operating subsidy cannot yet be quantified. LOSSAN Agency staff will continue to work with the state and Amtrak to refine the projections to include the service enhancement and expansions defined in the operating chapter, and will update the annual funding estimates in each subsequent business plan.

Table 11.2: Projected Pacific Surfliner Operating Subsidy FFY 2016-17

Item	Cost
Operating Costs*	\$ 118,404,876
Fare Revenue	\$ (78,835,800)
Sub Total - Net State Subsidy	\$ 39,569,076
Minor Projects	\$ 500,000
Net State Operating Subsidy	\$ 40,069,076

*Note: Projected operating subsidy assumes addition of 12th daily round trip

In addition to the state-funded operating subsidy, grant revenues are included in the proposed budget to fund various operational programs and capital projects in FY 2016-17 and FY 2017-18. In FY 2015-16, CalSTA awarded the LOSSAN Agency \$1,675,000 million in Transit and Intercity Rail Capital Program (TIRCP) grant funds to support the Pacific Surfliner Transit Transfer Program, which will allow Pacific Surfliner passengers to travel more seamlessly to connecting public transit services along the entire Pacific Surfliner route. The LOSSAN Agency is anticipating starting the Pacific Surfliner Transit Transfer Program in the fourth quarter of FY 2015-16, and therefore the remainder of the grant funds are re-budgeted in FY 2016-17 in the amount of \$1,535,000.

In addition to TIRCP, the LOSSAN Agency is an eligible recipient of CTSGP – Intercity Passenger Rail/Commuter Rail Systems funds administered by the California Governor’s Office of Emergency Services (CalOES). The CTSGP will make available approximately \$1.8 million per year to the LOSSAN Agency for FY 2016-17 and FY 2017-18. The CTSGP provides funding for capital projects that provide increased protection against a security or safety threat. Table 11.3 displays the proposed budget as it relates to the TIRCP and CTSGP grants and the related program expenses.

Table 11.3: Budgeted Grant Revenues and Related Program Expenses FY 2016-17 and FY 2017-18

Line Item	FY 2016-17	FY 2017-18
TIRCP Grant Revenue	\$ (1,535,000)	\$ -
Transit Transfer Program Expenses	\$ 1,535,000	\$ -
CTSGP Grant Revenue	\$ (1,800,000)	\$ (1,800,000)
CTSGP Project Expenses	\$ 1,800,000	\$ 1,800,000
Net Grant Programs Cost	\$ -	\$ -

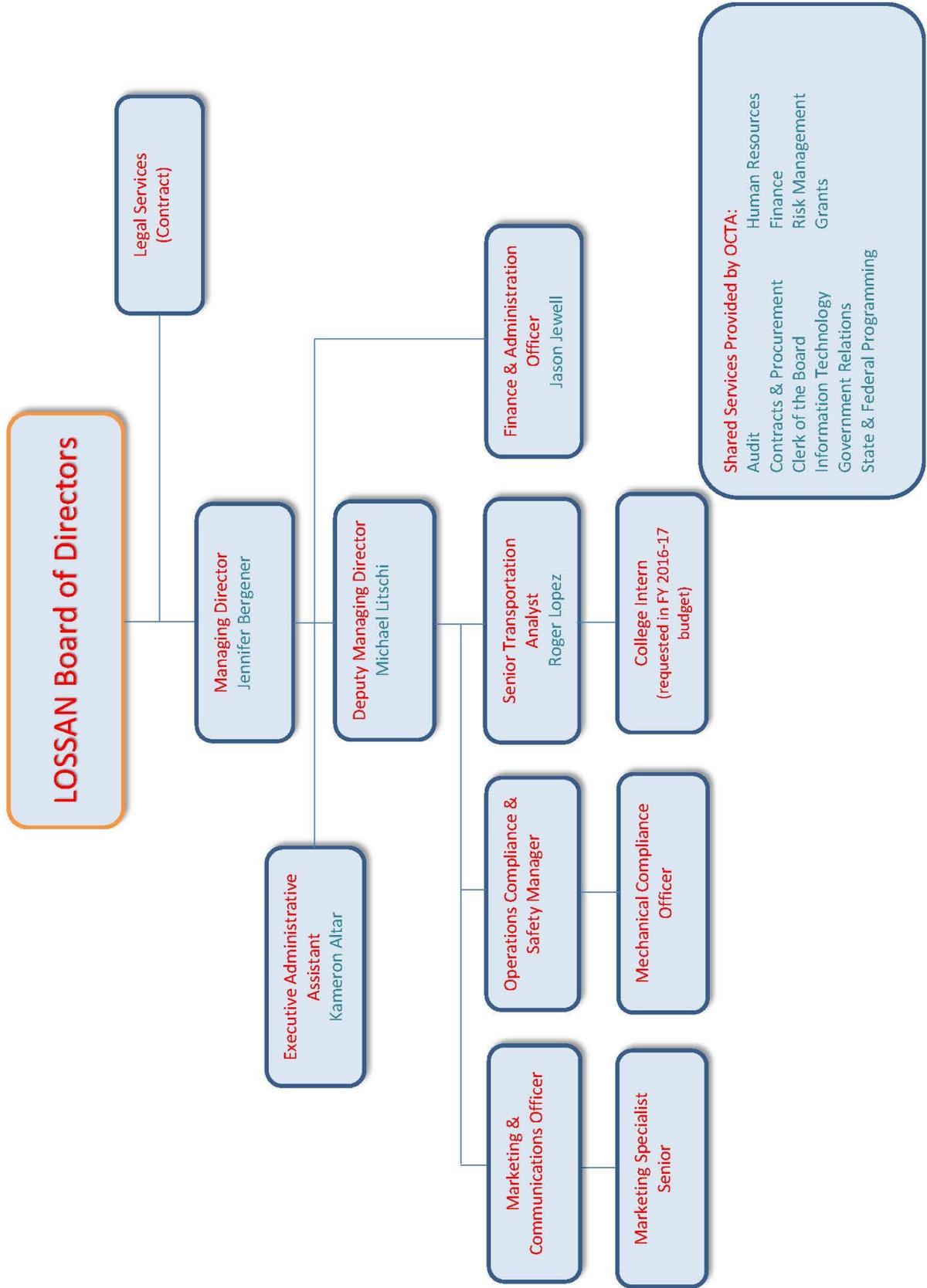
FY 2016-17 and FY 2017-18 Administrative and Marketing Budget

In addition to the contract costs with Amtrak for the operations and maintenance of equipment for the Pacific Surfliner service, there is an administrative component that is filled by OCTA as the LOSSAN managing agency. LOSSAN Agency utilizes a small number of key staff positions supported by OCTA staff on an as-needed basis. This way, the LOSSAN Agency and the state receives maximum benefit for the lowest possible cost, and is required to only fund the services and support actually used and needed for the administration of the Pacific Surfliner service. OCTA continues to provide a host of services through the support function including:

- General Administrative Services
- Financial Management and Budget
- Contracting and Procurement
- Audit
- Treasurer-Controller
- Operations
- Marketing
- Stakeholder Outreach
- Planning
- Risk Management
- Human Resources
- Legal

The dedicated staff positions necessary to support the LOSSAN Agency are included in the organizational chart in Figure 11.1 on the next page.

Figure 11.1: LOSSAN Rail Corridor Agency Organization Chart



The LOSSAN Agency’s proposed budget for the administrative and marketing functions for FY 2016-17 and FY 2017-18 are detailed in Table 11.4 below. Adjustments have been made from the prior business plan estimates to account for actual cost of staffing, legal services, and insurance. The administration and staffing line item has been adjusted to account for the actual cost of hired positions and a request for a part-time college intern. There is a requested increase in the insurance budget due to the increase in actual staff members, and the anticipation that the insurance marketplace may overvalue the risk due to the infancy of the LOSSAN Agency and no loss history. The OCTA Risk Manager will continue efforts to educate the insurers and negotiate premiums in an effort to control costs on behalf of the LOSSAN Agency. Additional funding has been requested in the contracted services line item to allow for a comprehensive and integrated update of the LOSSAN Strategic Plan to address and include network integration, recent changes to high-speed rail, and changes anticipated through the local management of the Pacific Surfliner service. There is a request for other business expenses, which include banking fees and Board meeting lunches for \$7,800, which is offset by interest revenue of \$3,500.

Table 11.4: LOSSAN Agency Administrative and Marketing Budgets: FY 2015-16 Approved, FY 2016-17 and FY 2017-18 Proposed

Line Item	FY 2015-16 Approved Budget	FY 2016-17 Proposed	FY 2017-18 Proposed
Administration - Staffing	\$ 2,387,512	\$ 2,737,262	\$ 2,928,870
Legal	\$ 60,000	\$ 50,000	\$ 51,500
Travel	\$ 25,000	\$ 26,950	\$ 27,759
Marketing	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000
Insurance	\$ 45,000	\$ 80,000	\$ 82,400
Contracted services, Audit, Safety/Security, Planning	\$ 100,000	\$ 325,000	\$ 334,750
Other Business Expenses	\$ -	\$ 7,800	\$ 8,034
Interest Revenue	\$ -	\$ (3,500)	\$ (3,605)
TOTAL	\$ 4,617,512	\$ 5,223,512	\$ 5,429,708

* Insurance premiums assume the operator carries the required federal coverage and that the LOSSAN Agency holds general liability and excess liability of \$4 million, errors and omissions public officials’ liability of \$1 million, and crime liability of \$2 million.

A summary of the combined administrative, marketing and operations budget for FY 2015-16 is provided in Table 11.5 on the next page. The administrative and marketing budget is effective as of July 1, 2015, while the operating budget takes effect October 1, 2015, consistent with the Amtrak FFY contract.

Table 11.5 LOSSAN Agency FY 2016-17 Proposed Budget

LOSSAN Agency FY 2016-17 Proposed Budget	
Operating	FY 2016-17
Operating Costs	\$ 118,404,876
Fare Revenue	\$ (78,835,800)
Sub Total - Net State Subsidy	\$ 39,569,076
Minor Projects	\$ 500,000
Net State Operating Subsidy	\$ 40,069,076
Grant Programs	
TIRCP Grant Revenue	\$ (1,535,000)
Transit Transfer Program Expenses	\$ 1,535,000
CTSGP Grant Revenue	\$ (1,800,000)
CTSGP Project Expenses	\$ 1,800,000
Net Grant Programs Cost	\$ -
Administrative and Marketing	
Administration - Staffing	\$ 2,737,262
Legal	\$ 50,000
Travel	\$ 26,950
Marketing	\$ 2,000,000
Insurance	\$ 80,000
Contracted services, Audit, Safety/Security, Planning	\$ 325,000
Other Business Expenses	\$ 7,800
Interest Revenue	\$ (3,500)
Net Administrative and Marketing	\$ 5,223,512
FY 2016-17 Net Operating, Grant, Administrative & Marketing Proposed Budget	\$ 45,292,588

Separation of Funding

To ensure state funding for the Pacific Surfliner service is kept separate from funding for OCTA projects and programs, a separation of funding has been established within the LOSSAN managing agency. The funding received from the state is managed through the treasurer and controller of OCTA, as the managing agency. The JPA specifically calls for the treasurer to be the depository of funds and to have custody of all funds of the LOSSAN Agency. The LOSSAN Agency follows OCTA-established policies and procedures that fully comply with the generally accepted accounting principles. The LOSSAN Agency utilizes OCTA's existing accounting system built on a robust platform, and has already established a completely segregated accounting system for LOSSAN Agency-related business. This system and established policies/procedures, overseen by the treasurer and controller, as well as the LOSSAN finance and administration officer, will ensure the preservation of the state's investment and a completely accurate accounting for administration of the Pacific Surfliner service, as well as provide for an accurate and timely reconciliation and return of any surplus funds.

Chapter 12: Government Relations and Legislative Advocacy

One of the benefits gained through local governance of the Pacific Surfliner service by the LOSSAN Agency is added flexibility in advocating for policies at the state and federal level to improve rail operations, increase funding for operations and capital needs, and allow better coordination and interoperability with connecting transit and rail services. In addition, the LOSSAN Agency has the ability to conduct targeted outreach to local governments and community organizations to help expand awareness of the services provided on the LOSSAN rail corridor and more directly respond to local needs.

Key to successful advocacy is the ability to partner with stakeholders to jointly advocate for mutually beneficial policies. The LOSSAN Agency has worked closely with the California Intercity Passenger Rail Leadership Coalition, consisting of the LOSSAN Agency, the CCJPA, SJJPA, the Coast Rail Coordinating Council, and RCTC, to jointly advocate for common policy positions.

The LOSSAN Agency plans to continue annual advocacy trips to Washington, D.C. and Sacramento, including attendance at any select committees formed to discuss passenger rail issues and participation in the States and Amtrak Intercity Passenger Rail groups. LOSSAN Agency staff and Board members will participate in meetings with key legislators representing the LOSSAN rail corridor delegation and Administration officials, allowing for the specific objectives of the LOSSAN Agency to be discussed in detail. These meetings are vital to generating a greater understanding of policy impacts on intercity rail and the need for greater recognition of the importance of the LOSSAN rail corridor in the overall Amtrak system. In addition, the LOSSAN Agency will consider using member agency-provided funds to retain state and federal advocacy services. This would allow the LOSSAN Agency to more effectively represent the interests of its member agencies in Sacramento and Washington, D.C., communicate policy goals and input to legislative and administrative offices, and receive regular updates on issues of importance to the LOSSAN Agency.

The annual legislative program adopted by the LOSSAN Board provides overall guidance to LOSSAN Agency advocacy activities, and staff will continue to provide regular legislative updates and bill analyses to the LOSSAN Board consistent with that program. In reviewing these items, the LOSSAN Board then provides direction on how LOSSAN Agency staff is to participate in policy discussions with other stakeholders, and potentially offer testimony as relevant policy discussions take place at the Legislature.

On the federal level, staff will continue to educate officials in Washington D.C. regarding the LOSSAN rail corridor and the Pacific Surfliner service. From a national perspective, the LOSSAN rail corridor is underinvested and could greatly enhance mobility in Southern California with additional funding for capital improvements, including potential cost sharing with Amtrak in areas also served by Amtrak long-distance trains. Efforts will be made to pursue resources for these improvements with the funding authorized in the new federal transportation reauthorization bill Fixing America's Surface Transportation (FAST) Act, which included a federal passenger rail title that will provide additional funding for passenger rail programs. Among these programs is the creation of a new Restoration and Enhancement Grant Program that will provide funding to support the initiation, restoration, or enhancement of intercity

passenger rail service. In addition, staff will continue to work through the PRIIA Section 209 working group to ensure Amtrak operating costs are reasonable and adequately documented.

Staff plans to provide quarterly legislative updates to the LOSSAN Board on policy issues of importance, including those related to the state budget, the FAST Act, and intercity rail policy matters. It is anticipated that the LOSSAN Agency will be focused on numerous policy issues at the state, federal, and local levels, including:

- Supporting efforts to pursue a stable, recurring source of intercity rail operations and capital funding for LOSSAN Agency-priority projects.
- Supporting efforts to apply for the use of cap-and-trade funding for LOSSAN Agency-priority projects, advocating for intercity rail as an eligible recipient, flexibility in revenue use and a streamlined allocation process.
- Supporting efforts to streamline and enhance transit services that provide for first-and-last mile connections to intercity and high-speed rail passenger rail services and stations.
- Continuing to advocate and educate officials in Sacramento and Washington D.C. regarding the LOSSAN rail corridor and Pacific Surfliner service.

The 2016 LOSSAN Legislative Program, adopted in November 2015, provides further detail on the LOSSAN Agency's legislative priorities, and includes three top priorities for 2016:

- Identify and secure long-term and sustainable funding sources to support passenger rail operations and capital projects in the LOSSAN rail corridor, including securing federal funds made available by the reauthorization of a federal rail title and ensuring the eligibility for the LOSSAN Agency to compete for funding under the state's cap-and-trade program.
- Support efforts to further enhance connectivity of regional rail and local transit services within the LOSSAN rail corridor.
- Continue to study and advance infrastructure and service improvement projects/programs.

At the local level, staff will continue to work with LOSSAN member agencies, local communities and stakeholders to build awareness of passenger rail services along the LOSSAN rail corridor, developing strategic partnerships to better evolve the services to meet local needs. Regular communications and outreach on service improvements and priority projects, as well as improved marketing campaigns, will foster a better understanding of issues faced along the LOSSAN rail corridor. Increased awareness of these services by local officials can then be leveraged to back consensus based operational improvements and policy activities.

In addition to the specific priorities identified by the LOSSAN Board, the LOSSAN Agency will continue to monitor policies impacting Amtrak service, including the development of the California HSR project, and commuter rail services in the LOSSAN rail corridor. The need for cohesive policies to allow for integration of rail services within the state, and improved access from other transportation modes, has never been more evident as the state works to achieving goals related to improved mobility, environmental sustainability, and safety.

Chapter 13: Safety and Security

Protecting the safety and security of passenger rail service on the LOSSAN rail corridor is key to attracting and retaining riders, and ensuring efficient operations of the Pacific Surfliner service. This chapter addresses safety and security on board Pacific Surfliner trains, as well as at stations, and along railroad ROW between San Diego, Los Angeles, and San Luis Obispo.

The Pacific Surfliner intercity rail service is operated by Amtrak, and is subject to federal safety standards and regulations in accordance with U.S. Code of Federal Regulations (CFR Title 49, Subtitle B, Chapter II). Responsible regulatory agencies overseeing general railroad safety along the LOSSAN rail corridor include the Federal Railroad Administration (FRA) and the California Public Utilities Commission (CPUC). The FRA Office of Railroad Safety promotes and regulates safety throughout the nation's railroad industry by issuing, implementing, and enforcing railroad safety regulations. The CPUC is the state agency charged with ensuring the safety of freight, intercity, and commuter railroads, as well as highway-railroad crossings in the state. The CPUC performs these railroad safety responsibilities through the Railroad Operations and Safety Branch of the Safety & Enforcement Division.

Operational, track, and other safety inspections are completed through a coordinated review among rail operators and owners, including Amtrak, Metrolink, NCTD, UPRR, BNSF Railway, CPUC, and FRA for federal and state compliance. The LOSSAN Agency will coordinate with these agencies to ensure that all reporting requirements are fulfilled at the federal and state levels.

A key objective of the LOSSAN Agency safety program is to instill a comprehensive safety culture that will govern all of the activities associated with the operations and maintenance of the service, while efficiently meeting operational performance goals. The LOSSAN Agency will continue to work with Amtrak and host railroads to ensure a detailed system safety and security program is in place to protect the welfare of Pacific Surfliner passengers and crew, as well as the general public.

As part of this effort, the LOSSAN Agency will continue to:

- Assess current rail safety and security awareness efforts
- Develop strategies for increasing safety and security awareness
- Work with host railroads to identify “hot spots” for trespassing and vehicle strikes
- Develop a targeted approach to rail safety and security training
- Develop outreach programs that meet the needs of the public, as well as stakeholders
- Ensure a continued safety culture for all who work and travel on Pacific Surfliner trains
- Work with local jurisdictions and host railroads to ensure that rail capital projects include a goal of improved safety
- Work with host railroads and rail operators to coordinate training with local first responders to help expedite emergency response and accident investigation in the event of an incident

- Support Operation Lifesaver, a national rail safety program with the goal of improving public awareness of safety around railroad tracks
- Work with Amtrak to ensure passenger and crew safety and security on board trains
- Work with Amtrak and local cities to ensure passenger safety and security at all Pacific Surfliner stations
- Seek out and leverage state and federal grant funds for safety and security improvements, including funding through CalOES

Safety and Security Onboard Trains

The LOSSAN Agency primarily serves in an oversight and coordination role with regard to safety and security onboard trains, relying on the extensive onboard safety and security programs and policies already put in place by Amtrak. LOSSAN Agency staff will continue to attend regularly scheduled safety meetings hosted by Amtrak for front-line employees, to reiterate that safety is the first priority in delivering Pacific Surfliner service.

All Pacific Surfliner cab cars and locomotives are currently equipped with a “forward facing” camera system to help aid in accident investigation. This provides crews and first responders with a valuable tool to assist with post-incident investigation, and can help to clear an incident scene more quickly so that trains can proceed. In addition, Amtrak is considering installing inward-facing cameras on locomotives and cab cars nationwide, similar to those currently used by Metrolink.

Pacific Surfliner passengers benefit from Amtrak’s existing security program, specifically the services of the Amtrak Police Department, which is responsible for monitoring and responding to onboard security incidents. Amtrak Police perform checked baggage screening, onboard security checks, and provide K-9 units when applicable. Additional law enforcement services are provided by local agencies and county sheriff’s departments along portions of the LOSSAN rail corridor in coordination with Amtrak.

Positive Train Control

Positive Train Control (PTC) is a predictive collision avoidance technology designed to stop a train in motion where the continued movement may result in an accident. The safety enhancing goals of PTC are to help prevent train-to-train collisions, speeding and over-speed derailments, incursions into track work zones, and movement of a train through a switch left in the wrong position. The primary benefits of PTC include saving the lives of train crews, passengers, and railroad workers, improving passenger and freight train operational efficiency, and providing real-time train location information. PTC will also be essential if the LOSSAN rail corridor is to see any future increases in maximum authorized track speed as the state continues to implement HSR service.

Wayside PTC equipment is being installed by host railroads along the LOSSAN rail corridor, including NCTD, Metrolink, BNSF Railway, and UPRR. Amtrak and Caltrans DRMT are in the

process of retrofitting Pacific Surfliner locomotives and cab cars to be fully compliant with PTC, as required by the FRA, and expect to have PTC fully operational on all Pacific Surfliner trains prior to the revised federal deadline of December 31, 2018. The LOSSAN Agency will continue to coordinate with Amtrak and Caltrans DRMT to ensure Pacific Surfliner trains are PTC equipped.

Safety on the Tracks

Safety incidents along the railroad ROW can include injuries and fatalities associated with incidents at grade crossings and trespassing on railroad property. Projects that improve safety include track and signal upgrades, gate and warning systems, and grade separations that eliminate at-grade crossings. In addition, safety can be improved through use of public awareness campaigns designed to educate the public about the risks of trespassing on railroad property and the importance of using caution around railroad tracks and trains.

Amtrak Police Department, Transportation Security Administration personnel, and law enforcement officers from federal, state, local, rail, and transit agencies can all be deployed at rail stations, and along the railroad ROW, to exercise counterterrorism and incident response capabilities. This coordinated effort involves activities such as heightened station and ROW patrols, increased security presence onboard trains, explosives detection canine sweeps, random passenger bag inspections, and counter-surveillance. Along the LOSSAN rail corridor, coordination with other entities for security at station and maintenance facilities may include:

- Amtrak Police Department
- BNSF Railway Police Department
- California Emergency Management Agency
- Department of Homeland Security
- Federal Bureau of Investigation – Joint Terrorism Task Force Los Angeles
- UPRR Police Department
- United States Border Patrol Immigrations and Customs Enforcement
- United States Coast Guard
- Local city police and county sheriff’s departments

Most of the stations along the LOSSAN rail corridor are outfitted with security cameras that feed directly to a local sheriff’s office or operations center that can dispatch emergency services. Some city-owned stations also offer security guards and long-term parking security. The LOSSAN Agency intends to invest additional funds provided by CalOES to install cameras at stations that currently do not have them that can be monitored from a central facility.

The LOSSAN Agency will coordinate on safety and security issues with the seven different ROW owners along the rail corridor. Currently, Metrolink and COASTER coordinate with local transit agencies to provide bus bridges when emergency incidents occur. In addition, Amtrak, Metrolink, and COASTER often transport each other’s passengers in the event of an incident on the tracks. The LOSSAN Agency will work to ensure these arrangements continue, and explore the possibility of expanding agreements with local transit providers to provide bus bridge service to Pacific Surfliner passengers in the event of a service disruption.

The LOSSAN Agency will coordinate safety and security activities, including working with the various stakeholders, including the state, LOSSAN member agencies, Amtrak, UPRR, BNSF Railway, Metrolink, COASTER, Operation Lifesaver, Department of Homeland Security, bus operators, and first responders along the LOSSAN rail corridor to assess current emergency preparedness and security training efforts. The LOSSAN Agency will pursue agreements with local transit providers for emergency bus service as well as create standard operating procedures to address service disruptions. Amtrak is responsible for all required reporting of safety data to federal, state, and local agencies, including FRA and CPUC.

Awareness and Public Outreach

Public information efforts will use both traditional and social media to continue to build awareness about vehicular, bicycle, and pedestrian safety around the tracks. The LOSSAN Agency also intends to work with Amtrak to enhance current communications strategies to consistently alert passengers of service issues.

Operation Lifesaver is a national rail safety coalition to prevent collisions, injuries, and fatalities on and around railroad tracks and highway-rail grade crossings. It is comprised of a voluntary effort by railroads, safety experts, law enforcement, public agencies, and the general public. Several LOSSAN member agencies and partners currently participate in Operation Lifesaver activities by implementing safety awareness campaigns and providing rail safety education. The LOSSAN Agency will work to expand its participation in the program of its own staff, and member agency staff, in order to expand the reach of Operation Lifesaver's rail safety message throughout the rail corridor. Recently, the LOSSAN Agency was invited to appoint a staff member to serve on the California Operation Lifesaver Board of Directors.

The LOSSAN Agency will utilize a network of rail safety educators through Operation Lifesaver, and take advantage of existing security training resources, as well as future safety and security grant programs. The primary objective is to increase rail safety and security awareness by targeting the existing base of employees, service corridor stakeholders and others, including non-English speaking populations, school groups, driver education classes, community audiences, professional drivers, law enforcement officers, and emergency responders. Components of safety awareness and education efforts include but not limited to:

- Coordination of rail safety outreach to specific communities/populations based on safety data
- Coordination of emergency preparedness training for corridor first responders in cooperation with Amtrak and host railroads
- Participation in rail security awareness training for train crews, maintenance staff, bus operators, and station agents provided by Amtrak
- Assist with coordination and monitoring of disaster simulations and table top exercises to ensure state and federal requirements are met

Chapter 14: Emerging Corridors

In addition to administering the Pacific Surfliner rail service, the LOSSAN Agency works with member agencies to study corridor enhancements and pursue expansion opportunities on emerging corridors that provide connectivity within Southern California and beyond. Specifically, the LOSSAN Agency plans to focus on connectivity to the California HSR system, as well as in the eastern communities throughout Riverside County and Coachella Valley, and coastal communities up to San Luis Obispo and further north to the Bay Area. These connections will provide seamless travel opportunities by rail throughout the region and state. System improvements on existing and emerging rail corridors will contribute to the success of the LOSSAN rail corridor, support future statewide HSR service and regional commuter rail operations, and provide connectivity with local transit systems.

Figure 14.1: Emerging Corridors



Source: LOSSAN Agency, 2013

The Coast Corridor (“Coast Daylight” Service)

The 474-mile Coast Corridor, which runs from San Francisco to Los Angeles, shown in Figure 14.1, currently serves a full complement of urban commuters, as well as regional, intercity, and interstate travelers. Constructed by the Southern Pacific Railroad between the late 19th and early 20th centuries, the Coast Corridor was originally built as a passenger line to transport passengers along the nearly 500 miles between San Francisco and Los Angeles. Current passenger rail services on the Coast Corridor are operated by Caltrain, Amtrak, and Metrolink.

Freight rail services are operated by UPRR, which carries two to four trains per day north of Oxnard and eight to 16 trains per day in the San Fernando Valley. The Coast Rail Line is considered a “secondary” or “relief” line to the much busier Central Valley Line to the east, which connects Northern and Southern California via the Central Valley. (Please refer to the FY 2015-16 LOSSAN Agency business plan for a more complete background description)

The “Coast Daylight” service is a proposed extension of Pacific Surfliner trains north of San Luis Obispo to San Jose and San Francisco. It would fill a gap in state-supported intercity passenger rail services between Northern and Southern California. There is no existing passenger rail service that directly connects the City of San Francisco and the densely populated San Francisco peninsula cities with Southern California.

The Amtrak Coast Starlight is a daily long-distance train operating through the Coast Corridor that serves the needs of long-distance travelers between Seattle, San Francisco Bay Area, and Los Angeles. Ultimately, the Coast Daylight service would originate and terminate in San Francisco and would be scheduled to complement the Coast Starlight schedule with a reliable intercity service to meet the needs of communities between the San Francisco Bay Area and Los Angeles.

The Coast Rail Coordinating Council (CRCC), which is a coalition of coastal agencies supporting the service, in coordination with the Transportation Agency for Monterey County (TAMC) has engaged Amtrak to prepare a feasibility of two options for initiating this service.

These options include:

- Scenario 1: San Diego to San Francisco via Los Angeles – San Luis Obispo –San Jose. (Proposes train #761 operates daily between San Diego and San Francisco. Proposes train #790 operates daily between San Francisco and San Diego.)
- Scenario 2: San Diego to San Jose via Los Angeles – San Jose. (Proposes train #761 operates daily between San Diego and San Jose. Proposes train #790 operates daily between San Jose and San Diego.)

In both scenarios a new proposed daily train #598 is added to operate between Los Angeles and San Diego.

Results of this analysis are encouraging:

- Annual *incremental* ridership SD-San Francisco: 124,600
SD-San Jose: 100,900
- Total *incremental* passenger revenue SD-San Francisco: 5,139,000
SD-San Jose: 4,068,000
- Total *incremental* PRIIA 209 costs SD-San Francisco: 8,292,000
SD-San Jose: 7,234,000
- Required annual operating support \$3.1 million
- Estimated farebox recovery ratio (both scenarios) >61%, 55%
- Capital improvement funds available to start service \$25 million

SERVICE ALTERNATIVES

	Alts 1&2 LAX-SD read down South #598	Alt 1 SF - San Diego read down read up South North #790 #761	Alt 2 SJ- San Diego read down read up South North #790 #761
San Fran			
San Jose			
San Jose			
Salinas			
SLO			
SLO			
Los Angeles			
Los Angeles	8:30 PM	7:30 PM	7:30 PM
San Diego	11:07 PM	10:30 PM	10:30 PM
		7:30 AM	7:30 AM
		6:55 AM	6:55 AM
		3:50 AM	3:50 AM
		1:04 PM	1:04 PM
		1:35 PM	1:35 PM
		1:35 PM	1:35 PM
		4:09 PM	4:09 PM
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- 2) Secure state operating support - CRCC staff have requested that the LOSSAN Agency include this service in its long-range financial plans and consider it for funding in the LOSSAN Agency business plan for FY 2019-20.
- 3) Secure equipment - In two to three years, there will be several equipment options. In 2019, the new state-owned equipment may make additional Amtrak equipment available, or the Comet Cars currently being used on the San Joaquin service may become available.
- 4) Secure legislative authority to administer the service – Senate Bill 1197 (Cannella) has been introduced that would permit the LOSSAN Agency to administer this service.

With respect to Coast Daylight services, the LOSSAN Agency business plan includes adequate staff resources to monitor continued planning efforts, which are currently primarily supported by CRCC staff. Given that it is unlikely that new services on this route would begin prior to 2019, any additional operating or capital funds necessary to support this route will be addressed in future business plans, pending the outcome of current studies, and discussions with Amtrak and UPRR.

Coachella Valley – San Gorgonio Pass Rail Service

The Coachella Valley-San Gorgonio Pass Rail Corridor refers to the approximately 150-mile long corridor between Los Angeles and the City of Indio as illustrated in Figure 14.2. RCTC is currently in the process of creating a Service Development Plan for this corridor to evaluate its feasibility and to determine the best alternative routes for the service. This service would be similar to the Pacific Surfliner service, as it would provide intercity rail service that would operate through a wide variety of settings from the heavily-urbanized areas of Los Angeles and Orange counties to the less-populated, but rapidly growing areas of eastern Riverside County. This service also has the potential to be the first step toward a Los Angeles to Phoenix, Arizona passenger rail service.

The current planning effort is evaluating several corridors, including Metro- and BNSF Railway-owned alignments through the cities of Los Angeles, Fullerton, and Riverside. There will also be an evaluation of alternative routes, including the UPRR's Los Angeles and Alhambra subdivisions, and review of the San Gabriel subdivision that is currently used by Metrolink. At Riverside, the alignment would pass through the Colton Crossing, where it would then follow the UPRR Yuma subdivision east to Indio. Future expansion of this corridor could connect to Pacific Surfliner service at Los Angeles, and potentially Fullerton, depending on final routing. The eastern portion of the corridor is one of the fastest-growing areas of Southern California due to increasing residential development, and has experienced a doubling of population between 1990 and 2010. In addition, the Coachella Valley has a large number of tourist destinations that attract regional trips from Los Angeles and Orange counties, as well as national and international visitors.

Figure 14.2: Coachella Valley-San Gorgonio Pass Rail Service Route



Source: Coachella Valley Service Development Planning Efforts, 2014

The only passenger rail service currently operating in this corridor between Los Angeles and the Coachella Valley is Amtrak’s Sunset Limited, a long-distance train that operates three times per week with a stop in Palm Springs during overnight hours. There is significant travel demand based on current travel patterns along the associated freeways. The ridership potential is also demonstrated regionally by the rapid growth in Metrolink ridership, and locally by the increase in Amtrak Thruway Bus Route 39 ridership between Fullerton, Palm Springs, and Indio.

Between 2010 and 2040, the Los Angeles-Coachella Valley Corridor is projected to experience an approximately 34 percent increase in population to a total of 23.2 million residents, along with a 30 percent increase in employment with a resulting total of 8.2 million jobs. While a majority of the corridor’s population and employment growth will occur in the Los Angeles and Orange County portions of the corridor, the Riverside County portion is forecasted to experience significant increases in population and employment, 52 percent and 49 percent, respectively. A majority of the future travel demand is still anticipated to be met by automobile travel, but an increasing portion of the projected trip growth could be accommodated by expanded intercity rail service. As a response to limited highway capacity in this congested corridor, travelers will seek more reliable and attractive modes of transportation.

The Coachella Corridor’s existing travel market is substantial, with 1.5 billion total annual two-way person trips (all modes) in 2000, and projections for more than 300 million additional trips by 2030, and another 100 million trips by 2040 (1.82 billion total). The 2030 two-way person trip projections for the four-key Coachella Valley travel pairs are as follows:

- Los Angeles County (south) to Coachella Valley – 29.0 million
- Orange County to Coachella Valley – 14.7 million
- San Bernardino County to Coachella Valley – 35.4 million
- Riverside County (western portion) to Coachella Valley – 50.7 million

The current Service Development Plan effort has multiple phases. The first phase is complete and included development of a work plan, outreach efforts, alternatives analysis, market

analysis, and ridership projections. Phase 2 has been initiated with the help of a FRA grant and will have a full environmental analysis and a finalized Service Development Plan which should take an additional couple of years to complete. Once these planning efforts are finished the corridor would be eligible to receive federal funds for construction. The LOSSAN Agency will continue to participate in these planning efforts and ensure they provide connectivity with Pacific Surfliner service.

Summary

Moving forward, the LOSSAN Agency will continue to work with member agencies to participate in planning efforts for passenger rail service in these emerging corridors, with a focus on creating seamless connections between the Pacific Surfliner, and future passenger rail services between Ventura and Santa Barbara, and on the Coast Daylight and Coachella Valley corridors.



LOSSAN RAIL CORRIDOR AGENCY
BUSINESS PLAN
FY 2016-17 - FY 2017-18