



TECHNICAL ADVISORY COMMITTEE AGENDA

LOSSAN RAIL CORRIDOR AGENCY TECHNICAL ADVISORY COMMITTEE MEETING

**Thursday, November 7, 2024
1:15 P.M. – 2:45 P.M.**

**Los Angeles County Metropolitan Transportation Authority
Henry Huntington Room, Third Floor
One Gateway Plaza,
Los Angeles, CA 90012**

Any person with a disability who requires a modification, accommodation, or agenda materials in an alternative format in order to participate in the meeting should contact the Los Angeles – San Diego – San Luis Obispo (LOSSAN) Clerk of the Board, telephone 714-560-5676, no less than two (2) business days prior to this meeting to enable LOSSAN to make reasonable arrangements to assure accessibility to this meeting.

Agenda Descriptions

Agenda descriptions are intended to give members of the public a general summary of items of business to be transacted or discussed. The posting of the recommended actions does not indicate what action will be taken. The Committee may take any action which it deems to be appropriate on the agenda item and is not limited in any way by the notice of the recommended action.

All documents related to the items referenced in this agenda are available for public inspection at www.lossan.org.

Public Comments on Agenda Items

Members of the public may address the Board of Directors regarding any item. Please complete a speaker's card and submit or notify the Clerk of the Board the item number on which you wish to speak. Speakers will be recognized by the Chairman at the time the agenda item is to be considered. A speaker's comments shall be limited to three (3) minutes.

Public Availability of Agenda Materials

All documents relative to the items referenced in this agenda are available for public inspection at www.lossan.org or through the LOSSAN Clerk of the Board's office at the Orange County Transportation Authority Headquarters, 600 South Main Street, Orange, California.



TECHNICAL ADVISORY COMMITTEE AGENDA

Written Comments

Written public comments may also be submitted by emailing them to lossantac@octa.net, and must be sent by 5:00 p.m. the day prior to the meeting. If you wish to comment on a specific agenda item, please identify the item number in your email. All public comments that are timely received will be part of the public record and distributed to the TAC Committee. Public comments will be made available to the public upon request.

If you have any questions regarding this new format or any upcoming meeting plans, please contact Michelle Alonso, LOSSAN Executive Assistant, at 714-560-5415, or at malonso@octa.net.

Teleconference Sites

The main location for this meeting is the Los Angeles County Metropolitan Transportation Authority Headquarters, Henry Huntington Room (3rd Floor). Several LOSSAN member agencies will be attending this meeting via teleconference from the following locations:

*San Diego Metropolitan Transit System
Executive Committee Conference Room (10th Floor)
1255 Imperial Avenue, Suite 1000
San Diego, CA 92101*

*Santa Barbara County Association of Governments
Oak Conference Room
260 N. San Antonio Road, Suite B
Santa Barbara, CA 93110*

*Orange County Transportation Authority
600 S Main Street
Conference Room 1012
Orange, CA 92868*

*San Luis Obispo Council of Governments
1114 Marsh Street
San Luis Obispo, CA 93401*

*California Department of Transportation
3390 Lanatt Street
Sacramento, CA 95819*

The public is welcome to attend and testify at any of the LOSSAN member agency locations listed above, all of which are accessible to the public. For more information, please contact LOSSAN Rail Corridor Agency staff, at (714) 560-5598 or e-mail malonso@octa.net, for specific meeting room locations at least 72 hours in advance of the meeting.

2024 TECHNICAL ADVISORY COMMITTEE Technical Advisory Committee - Membership Roster

	Member Agencies	Appointee	Alternate
North	San Luis Obispo Council of Governments	Lance Okuno	Tim Gillham
	Santa Barbara County Association of Governments	Aaron Bonfilio	Whitney Rush
	Ventura County Transportation Commission	Aubrey Smith	Claire Grasty
Central	Los Angeles County Metropolitan Transportation Authority	Jay Fuhrman	Vacant
South Central	Orange County Transportation Authority	Alexis Murillo-Felix	Megan Taylor
	Riverside County Transportation Commission	Sheldon Peterson	Vacant
South	San Diego Metropolitan Transit System	Brent Boyd	Julia Tuer
	North County Transit District	Katie Persons	Karen Tucholski
	San Diego Association of Governments	Pete Casellini	Anna Devers

Call to Order

1. Public Comments

At this time, members of the public may address the Technical Advisory Committee regarding any items within the subject matter jurisdiction of the Technical Advisory Committee, but no action may be taken on off-agenda items unless authorized by law. Comments shall be limited to three (3) minutes per speaker unless different time limits are set by the Chairman subject to the approval of the Technical Advisory Committee.

Special Calendar

2. Proposed 2025 Technical Advisory Committee Meeting Schedule

Consent Calendar (Items 3 through 6)

3. Approval of Minutes

James Campbell

Overview

Approval of the minutes of the LOSSAN Technical Advisory Committee meeting on September 5, 2024.

4. Fiscal Year 2023-24 Fourth Quarter Los Angeles - San Diego - San Luis Obispo Rail Corridor Trends

Kristopher Ryan

Overview

A report on ridership, revenue, and on-time performance for passenger rail services on the Los Angeles - San Diego - San Luis Obispo Rail Corridor, including the Pacific Surfliner, Metrolink, and COASTER, covering the fourth quarter of state fiscal year 2023-24.

5. Annual Business Plan and Budget Assumptions for Fiscal Years 2025-26 and 2026-27

James Campbell

Overview

The Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency is required to submit an annual business plan to the California State Transportation Agency by April 1 of each year that provides the basis for its annual budget request and any proposed changes to the Pacific Surfliner service. A list of key assumptions used in developing the business plan and budget for fiscal years 2025-26 and 2026-27 is presented.

6. Approval of Minutes
James Campbell

Overview

Approve the minutes of the October 3, 2024 LOSSAN Technical Advisory Committee meeting.

Discussion Calendar

7. Marketing Update for the Fourth Quarter of Fiscal Year 2023-24
Jason Jewell

Overview

Staff will provide a quarterly summary of marketing activities and performance in 2024.

8. Upcoming Draft Board Agenda Items
James D. Campbell

Overview

Overview of upcoming draft agenda items for the Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency Board of Directors' November meeting.

9. Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency Update

10. Technical Advisory Committee Members' Report

11. Adjournment

The next regularly scheduled meeting of this Committee will be held:

Thursday, February 6, 2024

Location: To be confirmed once the calendar is approved



November 7, 2024

To: Members of the Technical Advisory Committee
From: James D. Campbell, Operations Officer
Subject: Proposed 2025 Technical Advisory Committee Meeting Schedule

Overview

The Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency staff has developed the proposed Technical Advisory Committee meetings schedule for calendar year 2025, which reflects the months when Board of Directors meetings are planned and is consistent with the development of key deliverables and actions for calendar year 2025.

Recommendation

Approve the 2025 Technical Advisory Committee meetings schedule for the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency, including the location of the meetings.

Background

Each year, the Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency (Agency) Technical Advisory Committee (TAC) reviews and approves a proposed meeting schedule for the following calendar year. A proposed meeting schedule for the LOSSAN Agency TAC has been developed for 2025 based on the proposed Board of Directors meeting schedule and the development of key deliverables and actions for calendar year 2025.

Discussion

The proposed schedule for 2025 presents eight scheduled meetings. The LOSSAN Agency TAC will continue meeting the first Thursday of the month. To avoid conflicts with the Independence Day holiday, the meeting date option for July is the second Tuesday of the month.

All meetings will be in person and held at the Los Angeles County Metropolitan Transportation Authority unless otherwise stated in the draft

meeting schedule and approved by the LOSSAN Agency TAC. Meeting times are scheduled around the Pacific Surfliner train schedule when possible. Prior practices have been to hold three of the meetings at alternate locations along the corridor, with at least one in the southern portion of the corridor and one in the northern portion of the corridor. Staff requested member agency feedback in determining the desire and ability to continue with this practice and in selecting the months and locations for these meetings. Based on the feedback received, the San Luis Obispo Council of Governments will host the March 6th meeting, the Orange County Transportation Authority has offered to host the July 10th meeting and North County Transit District will host the October 2nd meeting.

Staff reserves the right to call Special meetings at any time should unforeseen circumstances arise which warrant a meeting, or to cancel meetings as appropriate. The proposed 2025 LOSSAN Agency TAC meeting calendar is included as Attachment A.

Summary

Staff has developed the proposed 2025 TAC meetings calendar for the LOSSAN Agency TAC's discussion and approval.

Attachments

- A. LOSSAN Technical Advisory Committee 2025 Meeting Calendar



LOSSAN TECHNICAL ADVISORY CALENDAR

2025 Committee Meetings

JANUARY						
SUN	MON	TUE	WED	THU	FRI	SAT
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

FEBRUARY						
SUN	MON	TUE	WED	THU	FRI	SAT
						1
2	3	4	5	6	7	8
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23	24	25	26	27	28	

MARCH						
SUN	MON	TUE	WED	THU	FRI	SAT
						1
2	3	4	5	6*	7	8
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23	24	25	26	27	28	29
30	31					

*2pm at SLOCOG

APRIL						
SUN	MON	TUE	WED	THU	FRI	SAT
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

MAY						
SUN	MON	TUE	WED	THU	FRI	SAT
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25	26	27	28	29	30	31

JUNE						
SUN	MON	TUE	WED	THU	FRI	SAT
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29	30					

JULY						
SUN	MON	TUE	WED	THU	FRI	SAT
		1	2	3	4	5
6	7	8	9	10*	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

*1:15pm at OCTA

AUGUST						
SUN	MON	TUE	WED	THU	FRI	SAT
					1	2
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31						

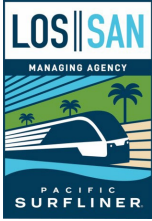
SEPTEMBER						
SUN	MON	TUE	WED	THU	FRI	SAT
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28	29	30				

OCTOBER						
SUN	MON	TUE	WED	THU	FRI	SAT
			1	2*	3	4
5	6	7	8	9	10	11
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19	20	21	22	23	24	25
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*12:45pm at NCTD

NOVEMBER						
SUN	MON	TUE	WED	THU	FRI	SAT
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30						

DECEMBER						
SUN	MON	TUE	WED	THU	FRI	SAT
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22	23	24	25	26	27	28
29	30	31				



Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency
TECHNICAL ADVISORY COMMITTEE

SEPTEMBER 5, 2024, Technical Advisory Committee (TAC) MEETING MINUTES

The Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency (Agency) TAC met on September 5, 2024, at the Los Angeles County Metropolitan Transportation Authority, Henry Huntington Room.

Committee members in attendance:

Peter Casellini, SANDAG
Anna Devers, SANDAG
Aaron Bonfilio, SBCAG
Clare Grasty, VCTC
Jay Fuhrman, LA Metro
Megan Taylor, OCTA
Alexis Murillo-Felix, OCTA
Katie Persons, NCTD
Lance Okuno, SLOCOG

Welcome and Introductions

Mr. James Campbell, LOSSAN Operations Officer, opened the September 5, 2024, LOSSAN Agency TAC meeting and welcomed the TAC members to Los Angeles County Metropolitan Transportation Authority, in the Henry Huntington Room.

1. Public Comments

CONSENT CALENDAR

2. Approval of Minutes

Alexis Murillo-Felix (OCTA) motioned to approve the item, second by Jay Fuhrman (LA Metro). The Committee approved the Consent items.

DISCUSSION CALENDAR

3. Equipment Update

Mr. James Campbell (LOSSAN) and Mr. Kyle Gradinger (Caltrans) provided a PowerPoint presentation on the Pacific Surfliner equipment updated, which consisted on the cars, reduction over the years, history, and redeployment plan.

Questions ensued regarding the procurements, vehicles, and trips. There was no further discussion.

4. Upcoming Draft Board Agenda Items

Mr. Campbell (LOSSAN) provided a brief overview of the agenda items for the September 16, 2024, LOSSAN Agency Board of Directors' meeting.

There was no further discussion.

5. Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency Update

An update was given on the current ridership which was the highest boardings since February 2020.

There is also a Railroad Administration's Restoration Grant that is currently being worked on.

A question ensued on the service restoration plan. There was no further discussion.

6. Technical Advisory Committee Members' Report

Ms. Anna Devers (SANDAG) reminded everyone they are hosting the California Passenger Rail Summit.

Mr. Jay Fuhrman (Metro) mentioned the hosting of the Rail Safety Summit.

Amtrak mentioned a new train schedule in October. The summer service is about to end and was successful. The November schedule is coming up as well.


7. Adjournment

The next regularly scheduled meeting of this Committee is scheduled to be held on:

Thursday, October 3, 2024
*Orange County Transportation Authority
550 Building
550 South Main Street,
Orange, CA 92868
1:15pm – 2:45pm*



October 3, 2024

To: Members of the Technical Advisory Committee
From: Jason Jewell, Managing Director 
Subject: Fiscal Year 2023-24 Fourth Quarter Los Angeles – San Diego – San Luis Obispo Rail Corridor Trends

Overview

A report on ridership, revenue, and on-time performance for passenger rail services on the Los Angeles – San Diego – San Luis Obispo Rail Corridor, including the Pacific Surfliner, Metrolink, and COASTER, covering the fourth quarter of state fiscal year 2023-24.

Recommendation

Receive and file as an information item.

Background

The 351-mile Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor (Corridor) travels through a six-county coastal region in Southern California and is the busiest state-supported intercity passenger rail corridor in the United States. The LOSSAN rail corridor includes 41 stations and typically hosts more than 150 daily passenger trains. Prior to the Coronavirus pandemic, 27 daily trains and 27 stations comprised the Pacific Surfliner service. The Pacific Surfliner currently serves 29 stations and normally operates 20 daily one-way trains (or ten round trips). In fiscal year (FY) 2019 (the last full fiscal year prior to the COVID-19 pandemic), there were nearly 2.8 million passenger trips on Pacific Surfliner trips alone, and an additional 5.4 million passenger trips were taken on the two commuter rail services combined (Metrolink and COASTER).

Discussion

This report provides an update on the performance trends of the passenger rail services operating on the LOSSAN corridor, focusing on three specific performance areas: usage (ridership and passenger miles), efficiency (revenue and farebox recovery), and quality (on-time performance (OTP) and

customer satisfaction). The report includes the Pacific Surfliner intercity passenger rail service, as well as commuter rail service on Metrolink's Ventura County Line (VCL) and Orange County Line (OCL), and the North County Transit District's (NCTD) COASTER system. Amtrak national data is included for comparative purposes. The reporting period is the fourth quarter of FY 2023-24, covering the months of April, May, and June 2024.

Impact of COVID-19 Pandemic

The COVID-19 pandemic significantly impacted transit operations globally, including the LOSSAN corridor's three rail services. Following Governor Newsom's March 15, 2020, safer-at-home order, the Pacific Surfliner, COASTER, and Metrolink experienced notable declines in ridership and revenue, leading to temporary service reductions starting late March 2020. As conditions improved, rail services gradually resumed. COASTER was the first to return to full service on May 29, 2021, coinciding with Metrolink's new Saturday service on its Ventura County Line. The Pacific Surfliner service restoration began on June 28, 2021, increasing from 12 to 18 daily one-way trips, and further expanded on October 24, 2021, to 21 daily one-way trips. Metrolink's significant service expansion occurred on April 4, 2022, with the addition of 26 trains, marking a pivotal recovery milestone since the pandemic onset.

Impacts of Temporary Track Closures in San Clemente Due to Falling Debris

On April 27, 2023, Pacific Surfliner service was suspended between San Juan Capistrano and Oceanside due to active debris movement on the slope adjacent to the Casa Romantica Cultural Centers and Gardens in San Clemente, just north of the San Clemente Pier. The debris fall occurred two miles north of where the Orange County Transportation Authority (OCTA) was conducting track stabilization work near the Cyprus Shore Homeowners Association, although the events were unrelated. During this closure, service adjustments included limited train service between San Diego and Oceanside, bus connections between Oceanside and Irvine, modified train service between San Juan Capistrano and Irvine, and regular train service from Los Angeles to San Luis Obispo. Regular Pacific Surfliner service resumed on May 27, 2023, after emergency stabilization of the affected hillside.

Recurring debris movement from the same slope led to another suspension of service starting June 5, 2023. On June 23, the Metrolink Board of Directors contracted Condon-Johnson & Associates, Inc., to design and install a temporary barrier wall to protect the tracks. This second closure extended through the end of the fourth quarter of FY 2023 and into the first quarter of FY 2024, with service fully restored on July 17, 2023, following the completion of the barrier wall.

In a subsequent development, another landslide on January 24, 2024, from private property above the city-owned Mariposa Trail Pedestrian Bridge once again scattered debris onto the track. OCTA, along with its partners, quickly responded by removing debris and the damaged bridge spans. A 200-foot-long catchment wall at Mariposa Point was constructed to safeguard the rail right-of-way. Despite the ongoing construction, limited Pacific Surfliner passenger service was able to resume in early March. Specific morning and evening trains operated through San Clemente to maintain connectivity while allowing construction to continue during mid-day. Full passenger service was restored on March 25, 2024, ahead of schedule, thanks to expedited work and robust cooperation among transportation agencies.

Usage

For the fourth quarter of FY 2023-24, total LOSSAN corridor **ridership for the three services combined was 1,240,761**, representing a 27.7 percent increase when compared to the same period of the previous year. A 24-month chart for the LOSSAN corridor, with the specific performance of each service, is shown in Figure 1.

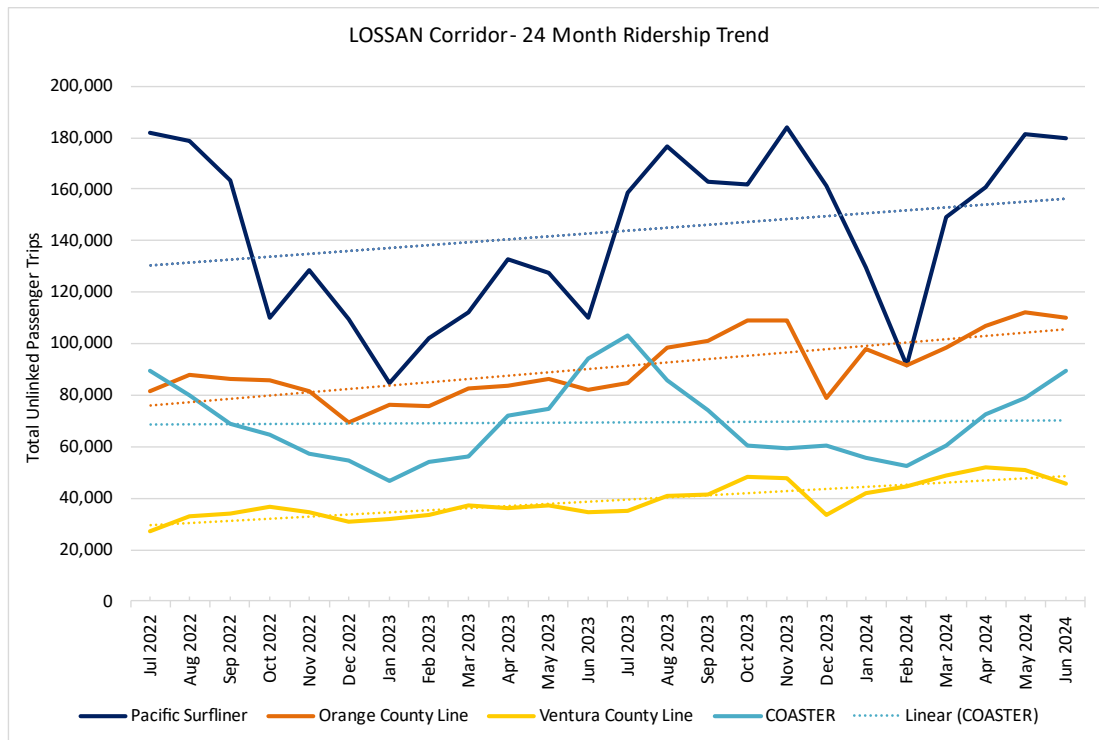


Figure 1

The 24 months of ridership data included in Figure 1 provide a more accurate indicator of the overall change in ridership along the corridor. Due to seasonal

variances, a complete ridership trend is difficult to discern from a single 12-month period. Including 24 months of data accounts for seasonal variations in ridership patterns and provides sufficient information to develop a linear trendline for each service. A summary table of the ridership, revenue, and OTP for the LOSSAN corridor can be found in Attachment A. In addition to this overall corridor data, details on the performance of each service are provided below.

Pacific Surfliner

Overall LOSSAN corridor ridership includes ridership on the Pacific Surfliner intercity passenger rail service, which operates between San Diego and San Luis Obispo. Pacific Surfliner ridership during the fourth quarter of FY 2023-24 was 521,629, representing an increase of 40.8 percent when

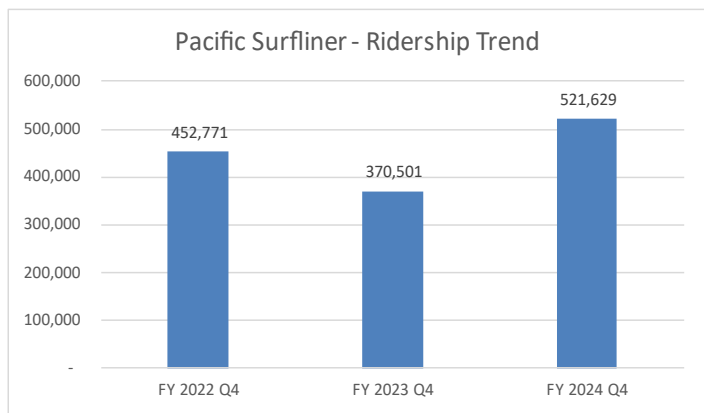


Figure 2

compared to the same period last year, as is illustrated in Figure 2. The increase in ridership can be attributed to a combination of growing demand and the absence of service disruptions during FY2024 Q4. In contrast, FY2023 Q4 experienced significant service disruptions due to emergency track closures in San Clemente. Additionally, the reported Pacific Surfliner ridership includes Metrolink and COASTER pass holders utilizing the Rail 2 Rail (R2R) Program, which allows Metrolink monthly pass holders and COASTER passengers to ride Pacific Surfliner trains within the stations identified on their valid fare media, subject to certain restrictions.

Metrolink

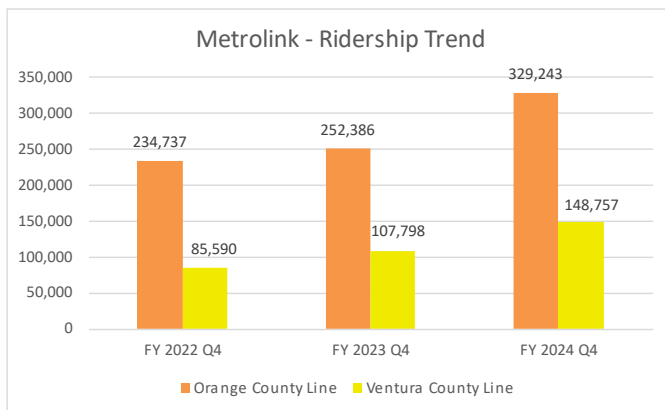


Figure 3

The VCL, which operates between East Ventura and Los Angeles, saw a ridership increase of 38.0 percent when compared to the fourth quarter of last year. The OCL, which operates between Los Angeles and Oceanside, saw a 30.5 percent increase in ridership over the same report period in the prior year. During

the fourth quarter of FY 2023-24, there were an average of 10,763 Metrolink pass holders per month who utilized the R2R Program to ride Pacific Surfliner trains¹.

COASTER

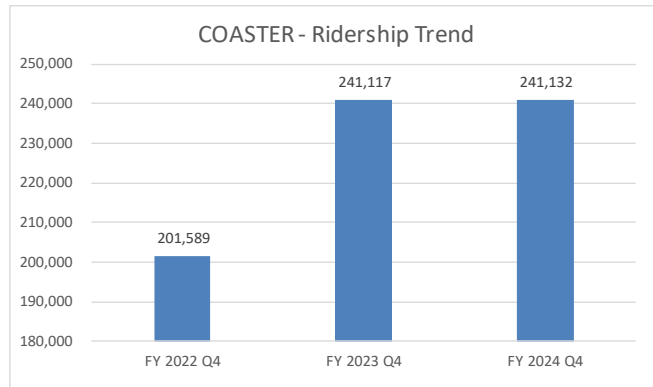


Figure 4

NCTD’s COASTER commuter rail service operating between Oceanside and San Diego experienced no change in ridership during the fourth quarter of FY 2023-24 when compared to the same period in the prior year, as shown in Figure 4. During the fourth quarter of FY 2023-24, there were an average of 605 COASTER pass holders per

month utilizing the R2R Program to ride Pacific Surfliner trains².

Amtrak System

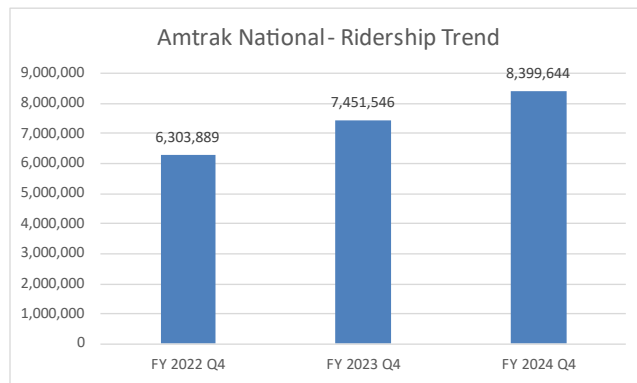


Figure 5

Amtrak service nationwide experienced a cumulative ridership increase of 12.7 percent for the fourth quarter of FY 2023-24 when compared to the same period in the prior year, as illustrated in Figure 5.

Amtrak’s Coast Starlight, which operates between Seattle and Los Angeles, saw ridership increase by 11.7 percent in the

fourth quarter compared with the same period last year. The Capitol Corridor (operating between Auburn, Sacramento, Oakland, and San Jose) and the San Joaquins Corridor (operating from both Oakland and Sacramento to Stockton and Bakersfield) are the two other California state-supported intercity passenger rail services operated by Amtrak, and provide a comparison to the Pacific Surfliner service despite serving significantly different markets. Ridership decreased by 0.3 percent on the Capitol Corridor and increased by 4.2 percent

¹ Metrolink R2R values are based on preliminary, unaudited data provided by Amtrak.

² COASTER R2R values are based on preliminary, unaudited data provided by Amtrak.

on the San Joaquins Corridor during the fourth quarter when compared to the same period last year.

Passenger Miles

A passenger mile is defined as one passenger traveling one mile. For example, ten passengers who each travel 100 miles would generate 1,000 passenger miles. This metric depicts the growth in passenger usage and distance traveled.

The Pacific Surfliner generated over 50 million passenger miles during the fourth quarter of FY 2023-24, which is a 76.0 percent increase compared to the same period in the prior year. This increase in passenger miles corresponds with the significant growth in ridership and the absence of service disruptions. Factoring in the average pounds of carbon dioxide emissions generated per passenger mile traveling in a private automobile versus on passenger rail, a reduction of about 18,261 tons of greenhouse gases was achieved, which is equivalent to avoiding burning approximately 1,864,082 gallons of gasoline.

Efficiency

Passenger Trips Per Train Mile

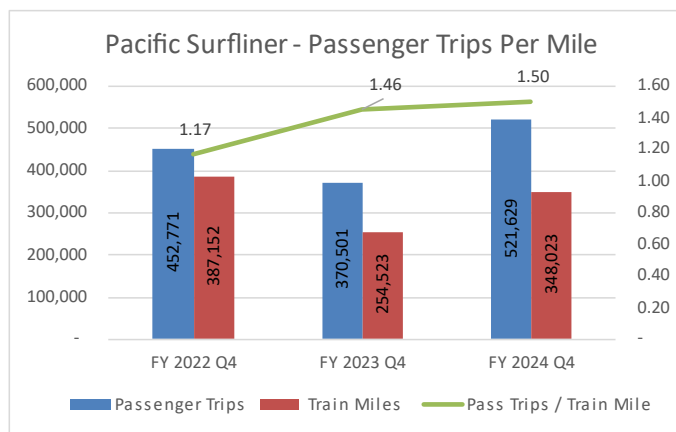


Figure 6

Passenger trips per train mile is calculated by dividing total passenger trips (ridership) by the total miles traveled by all Pacific Surfliner trains operated in revenue service³. This metric focuses on service efficiency, as it is the ratio of usage (passenger trips) over service provided (train miles). The higher the ratio value, the more efficient the service, and vice versa.

For the fourth quarter of FY 2023-24, the ratio of passenger trips per train mile increased slightly by 3.0 percent when compared with the same period in the prior year, as illustrated in Figure 6.

³ Total train miles include deadhead mileage to and from rail yard facilities.

Revenue

In correlation with the Pacific Surfliner ridership increase, primarily due to the absence of service disruptions that were present in the previous fiscal year, total revenue for the Pacific Surfliner also increased. For the fourth quarter of FY 2023-24, total revenue increased by 46.0 percent when compared with the same period in the prior year, as shown in Figure 7.

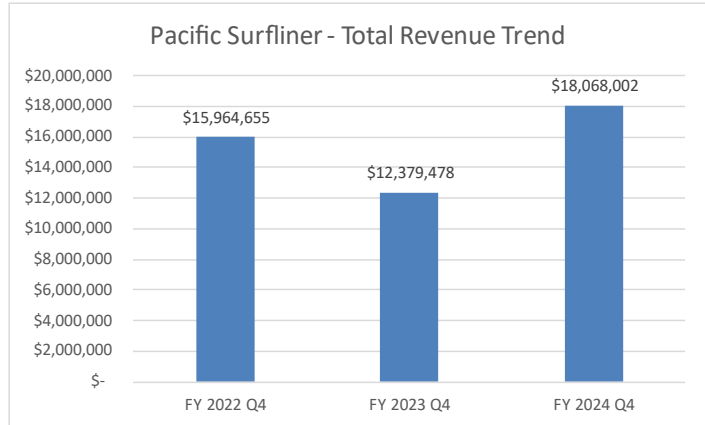


Figure 7

Farebox Recovery

The Pacific Surfliner farebox recovery ratio is calculated as total revenue divided by total operating expenses. As a performance measure, farebox recovery is normally reported on an annual basis, versus a shorter period. This is because expenses are not linear throughout the year, which can result in significant fluctuations in the farebox recovery ratio from month to month and even quarter to quarter. The Pacific Surfliner is legislatively required to achieve a minimum annual farebox recovery of 50 percent. The Pacific Surfliner farebox recovery ratio for the 12-month period ending June 30, 2024, was 58.3 percent. For comparison, including only the three months of the fourth quarter of FY 2023-24 results in a farebox recovery ratio of 61.6 percent.

Quality

OTP

The methodologies for calculating OTP vary significantly between intercity and commuter rail services. A commuter train is considered late if it arrives six or more minutes late to its terminal location, while a Pacific Surfliner train is considered late if it arrives more than 15 minutes after its scheduled arrival time. For the Pacific Surfliner service, endpoint OTP is calculated by dividing the total number of trains arriving on time at the end point by the total number of trains operated. The State of California intercity passenger rail Uniform Performance Standards (UPS), which were approved by the Secretary of Transportation in 2014, set an endpoint OTP goal of 90 percent for the Pacific Surfliner service.

For the three months in the fourth quarter of FY 2023-24, endpoint OTP for the Pacific Surfliner averaged 82.8 percent, which was a 5.4 percent increase over the same period in the prior year. Figure 8 illustrates a monthly OTP trend for the Pacific Surfliner.

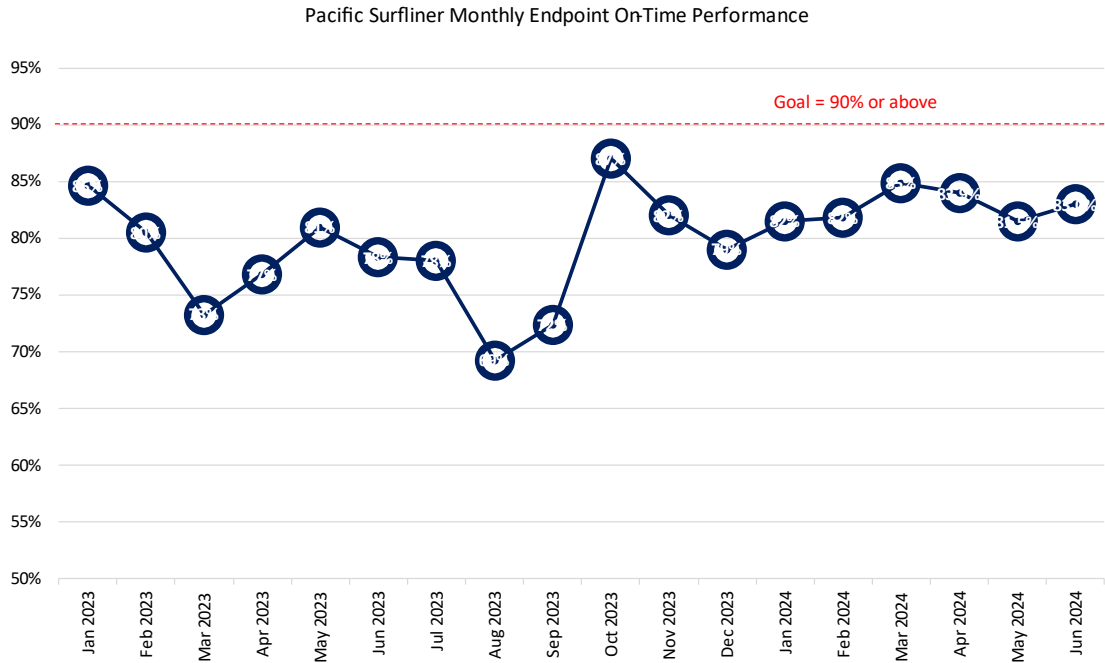


Figure 8

The LOSSAN Rail Corridor Agency (LOSSAN Agency) will continue to work collaboratively with the Corridor Improvement Team via quarterly meetings to identify and address issues negatively impacting OTP.

Customer Satisfaction

Amtrak reports a monthly Electronic Customer Satisfaction Index (eCSI) score for all routes, in which a “very satisfied” percentage is calculated per 100 passengers via electronic surveys. For the fourth quarter of FY 2023-24, the Pacific Surfliner scored an average eCSI of 83.7 percent, representing a 8.2 percent increase from the average eCSI of 77.3 percent achieved during the same period last year.

Additional Performance Indicators

Food and Beverage Sales

The LOSSAN Agency’s focus on improving service quality and the customer experience has prompted additional attention to the food and beverage selections offered in the Pacific Surfliner Café Car. Continual effort is made to ensure that menu items

are meeting passenger expectations. As part of that effort, LOSSAN Agency staff closely monitor food and beverage sales to gauge the success of what is being offered and identify items that need to be adjusted.

<i>Sales Category</i>	<i>FY23 Q4</i> <i>(Apr–June 2023)</i>	<i>FY24 Q4</i> <i>(Apr–Jun 2024)</i>	<i>% Change</i>
Baked Goods	\$ 32,547	\$ 76,410	134.8%
Beer	\$ 92,279	\$ 201,426	118.3%
Beverages	\$ 138,291	\$ 280,608	102.9%
Dairy Products	\$ 653	\$ 1,255	92.3%
Fresh Prepared Foods	\$ 94,927	\$ 178,878	88.4%
Liquor	\$ 58,269	\$ 115,718	98.6%
Miscellaneous Merchandise	\$ 1,999	\$ 174	-91.3%
Packaged Snack Foods	\$ 266,053	\$ 403,062	51.5%
Salads	\$ 868	\$ -	-100.0%
Wine	\$ 121,872	\$ 239,201	96.3%
Total Revenue	\$ 807,756	\$ 1,496,730	85.3%

Figure 9

For the fourth quarter of FY 2023-24, food and beverage sales increased by 85.3 percent compared to the same quarter in the prior year, a result of both increased ridership and the absence of service disruptions. This growth also reflects the successful collaboration between LOSSAN and Amtrak in evaluating food and beverage offerings, making adjustments based on customer survey feedback, and optimizing pricing. Details on the performance of each specific category are included in Figure 9.

Amtrak Thruway Bus Service

Pacific Surfliner rail service is supplemented by Amtrak’s network of Thruway buses that connect passengers throughout the LOSSAN corridor. The bus routes function as part of the Pacific Surfliner service and as of June 30, 2024, included:

- Route 17: Two daily round trips between Santa Barbara, San Luis Obispo, and Oakland (where it connects with Capitol Corridor); and one daily round trip between San Luis Obispo and Oakland.
- Route 39: One daily round trip between Fullerton and Indio/Coachella Valley, and one daily round trip between Fullerton and Palm Springs.

For the fourth quarter of FY 2023-24, combined ridership on these two routes totaled 22,179, representing an increase of 2.5 percent when compared to the ridership of 21,629 for the same period in the prior year. This increase can be

attributed to higher overall ridership, supported by the absence of service disruptions and growing passenger demand.

Summary

This report provides an update of trends for the usage, efficiency, and quality of the passenger rail services on the Los Angeles – San Diego – San Luis Obispo Rail Corridor, including the Pacific Surfliner, Metrolink, and COASTER, for the fourth quarter of FY 2023-24. During the fourth quarter, total combined passenger rail ridership along the corridor increased by 27.7 percent when compared to the same period last year. Notably, ridership on the Pacific Surfliner alone increased by 40.8 percent, accompanied by a significant 46.0 percent increase in total revenue relative to the same period in the previous year.

Attachment

- A. Los Angeles – San Diego – San Luis Obispo Rail Corridor Performance Summary, Fourth Quarter Fiscal Year 2023-24

Prepared by:




Kristopher Ryan
Chief Financial Officer
(714) 560-5409

**Los Angeles – San Diego – San Luis Obispo Rail Corridor Performance Summary
Fourth Quarter Fiscal Year 2023-24**

<u>Service</u>	<u>Ridership (total)</u>	<u>Ridership – Growth Over Same Quarter Previous Year</u>	<u>Revenue (total)</u>	<u>Revenue – Growth Over Same Quarter Previous Year</u>	<u>Endpoint OTP (3 mo. avg.)</u>
Pacific Surfliner	521,629	40.8%	\$18,068,002	46.0%	82.8%
Metrolink Orange County Line	329,243	30.5%	---	---	87.9%
Metrolink Ventura County Line	148,757	38.0%	---	---	92.8%
COASTER	241,132	0.0%	---	---	94.0%
LOSSAN Total	1,240,761	27.7%	---	---	---
Amtrak Nationwide	8,399,644	12.7%	---	---	72.7%
Coast Starlight	93,340	11.7%	---	---	72.0%
Capitol Corridor	264,776	-0.3%	---	---	87.0%
San Joaquins	228,912	4.2%	---	---	68.7%



October 3, 2024

To: Members of the Technical Advisory Committee
From: Jason Jewell, Managing Director 
Subject: Annual Business Plan and Budget Assumptions for Fiscal Years 2025-26 and 2026-27

Overview

The Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency is required to submit an annual business plan to the California State Transportation Agency by April 1 of each year that provides the basis for its annual budget request and any proposed changes to the Pacific Surfliner service. A list of key assumptions used in developing the business plan and budget for fiscal years 2025-26 and 2026-27 is presented.

Recommendation

Direct staff to incorporate the key assumptions into the development of the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency business plan for fiscal years 2025-26 and 2026-27.

Background

Per the interagency transfer agreement (ITA) between the Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency (Agency) and the California Department of Transportation, as well as the LOSSAN Joint Powers Agreement, the LOSSAN Agency must develop an annual business plan (ABP) to be approved by the LOSSAN Agency Board of Directors (Board). The ABP must be submitted to the Secretary of the California State Transportation Agency (CalSTA) by April 1 of each year. It is a two-year planning, operations, and budget document that serves as the LOSSAN Agency's formal plan and funding request to CalSTA. CalSTA is required to review and approve the ABP by September 1 of each year. The ABP must be consistent with the most recently adopted State Rail Plan and California High-Speed Rail Authority business plan.

The ABP is required to include a report on performance of the Pacific Surfliner passenger rail service; an overall operating plan, including proposed service enhancements to increase ridership and accommodate travel demand; a

marketing plan; a short-term and long-term capital improvement program; funding requirements for the upcoming fiscal year (FY); and an action plan with specific performance goals and objectives. The ABP must also document any planned operational changes necessary to provide the service, including operating plans to serve peak-period trips and consideration of other service expansions and enhancements.

In addition, the ABP must clearly delineate how funding and accounting for state-sponsored intercity passenger rail service will be separate from locally sponsored services in the rail corridor. Proposals to expand or modify passenger services are required to be accompanied by the identification of all associated estimated costs, revenue and ridership projections. The ABP also establishes, among other things: fares, operating strategies, and other initiatives designed to meet performance standards established in the ITA.

Discussion

The development of the assumptions for FY 2024-25 and 2025-26 was heavily impacted by efforts to rebuild and restore the Pacific Surfliner service. The ABP for FY 2025-26 and 2026-27 will focus on the LOSSAN Agency's efforts to restore and enhance the Pacific Surfliner service in the following general areas:

- Developing and implementing strategies aimed at restoring and growing service, while keeping operating costs down and increasing revenue, including:
 - o Instituting a pilot of a demand pricing model for Pacific Surfliner fares
 - o Continuing to look for operational efficiencies in areas such as station staffing, thruway bus routes, and baggage services
 - o Increasing revenue through the sale of train wrap advertising space
- Implementation of the Board approved 2023 Strategic Plan
- Focusing on marketing initiatives to incentivize both new and returning passengers.
- Continued coordination with the 2028 Summer Olympics organizers is needed to prepare for the increased demand for public transportation due to the city's "car-free" initiative. Service expansion would benefit both the games and the Pacific Surfliner by enhancing mobility during the event.

Draft budget projections will also be provided as part of the ABP as a placeholder and may be revised and resubmitted for final approval by June 30, 2025, contingent on the receipt of an operating forecast from Amtrak. The operating forecast is planned to be received from Amtrak by May 15. LOSSAN Agency staff also plans on coordinating with the California Department of Transportation Division of Rail, and the other two California Joint Power Authorities on operating forecast estimates.

The following key assumptions are proposed to be incorporated into the FY 2025-26 and 2026-27 ABP:

- Operation of 12 daily round trips, and continued restoration of service with a planned increase to 13 daily round trips in FY 2025-26.
- Service expansion, including 1 new roundtrip between San Diego and Goleta or San Luis Obispo (contingent on the availability of funding and equipment).
- Additional service for holidays and special events.
- Ridership and revenue proportionate to the service level, including assumptions for demand pricing revenue.
- Continued coordination with Metrolink and the North County Transit District on improving the existing Rail 2 Rail Programs.
- 18 full-time staff positions consistent with the current staffing levels.
- A performance-based merit increase and special award pool for administrative employees consistent with the Orange County Transportation Authority budget proposal for FY 2025-26. These percentages are unknown at this point.
- Annual marketing budget consistent with planned level of service and state funding availability.
- An ongoing capital improvement program that identifies and uses all available funding sources.

Next Steps

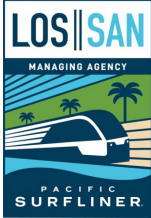
Staff will prepare the draft ABP and budget for FY 2025-26 and 2026-27, using these assumptions. The draft chapters will be provided to the Technical Advisory Committee (TAC) for review and comment in December 2024. A redline version, incorporating TAC feedback as appropriate, will be returned to the TAC prior to returning to the Board for initial review and approval in February 2025.

Summary

Staff has developed key assumptions for use in the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency budget and business plan for fiscal years 2025-26 and 2026-27. Staff will finalize the draft business plan and budget and return to the Board of Directors for initial review and approval in February 2025.

Attachment

None.



Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency
TECHNICAL ADVISORY COMMITTEE

OCTOBER 5, 2024, Technical Advisory Committee (TAC) MEETING MINUTES

The Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency (Agency) TAC met on October 5, 2024, at the Orange County Transportation Authority offices, Conference Room 8.

Committee members in attendance:

Brent Boy, MTS
Anna Devers, SANDAG
Alexis Murillo Felix, OCTA
Aubrey Smith, VCTC
Aaron Bonfilio, SBCAG
Whitney Rush, SBCAG
Lance Okuno, SLOCOG

Welcome and Introductions

Mr. James Campbell, LOSSAN Operations Officer, opened the October 5, 2024, LOSSAN Agency TAC meeting and welcomed the TAC members to the Orange County Transportation Authority offices, Conference Room 8.

1. Public Comments

CONSENT CALENDAR

- 2. Approval of Minutes**
- 3. Fiscal Year 2023-24 Fourth Quarter Los Angeles – San Diego – San Luis Obispo Rail Corridor Trends**
- 4. Annual Business Plan and Budget Assumptions for Fiscal Years 2025-26 and 2026-27**

As quorum was not met, no action could be taken.

DISCUSSION CALENDAR

5. Fiscal Year 2023-24 Fourth Quarter Amtrak Pacific Surfliner On-Time Performance Analysis

Mr. Kristopher Ryan (LOSSAN) provided a presentation of the Pacific Surfliner On-Time performance analysis for the fourth quarter of fiscal year 2023-24, which included the monthly average customer on-time performance, delays, and improvements.

A question ensued on the ridership and delays. There was no further discussion.

6. Upcoming Draft Board Agenda Items

Mr. Campbell (LOSSAN) provided a brief overview of the agenda items for the October 21, 2024, LOSSAN Agency Board of Directors' meeting.

A basic question ensued in regard to one of the items listed. There was no further discussion.

7. Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency Update

An update was given on the current ridership with the highest annual ridership since 2020.

LOSSAN submitted to FRA their application for the restoration and enhancement grant, which could provide funding over the next 6 years.

Staff will be providing an update to the Board in November detailing the legislation.

There was no further discussion.

8. Technical Advisory Committee Members' Report

Metrolink mentioned their October 21st services changes, with 32 trains additional trains.

Amtrak mentioned a successful shunt testing train on the Union Pacific, which they hope will improve on OTP.

Caltrans mentioned the state rail plan to be finalized soon. They also mentioned the FRA Corridor ID program and the funding for that program can be made available from federal grants.

OCTA mentioned the October 21st Metrolink schedule.

SANDAG mentioned the California Passenger Rail Summit next week.

MTS mentioned the trolley line being part of one of the tours being offered for the Summit.

9. Adjournment

The next regularly scheduled meeting of this Committee is scheduled to be held on:

Thursday, November 7, 2024

*Los Angeles County Metropolitan Transportation Authority
Henry Huntington Room, Third Floor
One Gateway Plaza,
Los Angeles, CA 90012*



Marketing Update for the Fourth Quarter of Fiscal Year 2023-24

LOSSAN Technical Advisory Committee Meeting | November 7, 2024



Performance Summary (PacificSurfliner.com)

- Quarter 4 (Q4) of fiscal year (FY) 2023-24 saw an increase in revenue derived from PacificSurfliner.com compared to the prior quarter.
- Over 236k qualified sales leads were delivered to Amtrak.com from the booking widget between April and June, resulting in more than \$1.3 million in revenue.



Users to PacificSurfliner.com



Referral traffic to Amtrak.com



Bookings on Amtrak.com



Riders



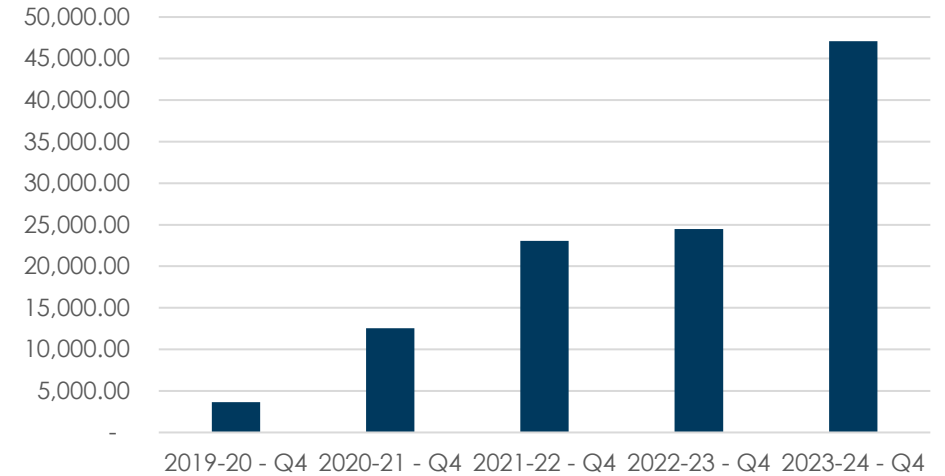
Revenue

	Users to PacificSurfliner.com	Referral traffic to Amtrak.com	Bookings on Amtrak.com	Riders	Revenue
Q4 – FY 24 (Apr-June)	612,000	236,292	21,547	47,109	\$1,312,471
Q3 – FY 24 (Jan-Mar)	410,000	146,919	10,753	21,628	\$701,726

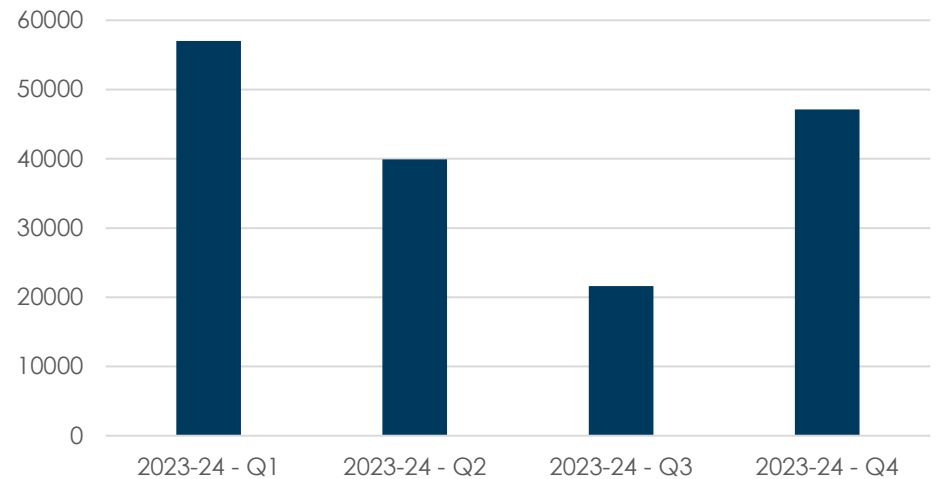
Performance Over Time (from online bookings)

April to June	Referral to Amtrak.com	Bookings	Ridership (from online Bookings)	Revenue (from online Bookings)
2019-20 - Q4	23,972	2,004	3,655	\$114,237
2020-21 - Q4	61,423	7,284	12,544	\$507,745
2021-22 - Q4	108,577	10,885	23,069	\$726,770
2022-23 -Q4	149,903	10,874	24,493	\$752,201
2023-24 -Q4	236,292	21,547	47,109	\$1,312,471

Q4 Ridership Year-over-Year



Past Year Ridership



Wonderfront Music & Arts Festival

- Downtown San Diego, May 10-12
- Promotion: Save 20% on train travel to San Diego and 10% on event tickets

22%

Ridership
Increase*

8%

Promotional
Code Usage

* Based on station arrivals during event days vs. 6-month average



California Strawberry Festival

- Ventura Fairgrounds, May 18-19
- Promotion: Kids ride free - up to three children ride free with each paying adult
- Onboard rack cards & 3 video collaborations

86%

Ridership
Increase*

37%

Promotional
Code Usage

* Based on station arrivals during event days vs. 6-month average



X Games 2024

- Ventura Fairgrounds, June 28-30
- Promotion: Save 15% on admission and train travel to Ventura
- Extra weekend service added to schedule
- Train wrap, eblast, social posts, onboard rack cards, ad in program

39%
Ridership
Increase*


21%
Promotional
Code Usage

* Based on station arrivals during event days vs. 6-month average




LAist Campaign


- Radio and digital ad campaign
- Ran from May 27 to July 7
- Placements:
 - 125+ aired radio spots
 - 122K+ display ad impressions
 - Dedicated [eBlast newsletter](#) to 150K subscribers

VIEW ONLINE  [DONATE](#)

From time to time, we send you messages such as this one from our underwriting partners. Our newsroom is not involved in their creation or messaging. These occasional messages help to support our independent journalism.

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Amtrak Pacific Surfliner

Treat yourself to a journey along the coast unlike any other. The [Amtrak® Pacific Surfliner®](#) is one of the most scenic train routes in the country, traveling through landscapes that deliver sweeping views of sparkling ocean waters, rolling hills, rocky mountain passes, and more. But the views are not the only thing that make the Pacific Surfliner the ideal way to travel through Southern California.

Communications

- **Passenger:**
 - Del Mar Phase 5 Project
 - Planned Track Closures
 - R2R Blackout Dates
- **Press Releases:**
 - Amtrak Pacific Surfliner Adds Additional Trains for X Games Ventura 2024. May 30, 2024
 - Explore Southern California This Summer with Amtrak Pacific Surfliner: Tips & Tricks for Travelers
- **In the Media:**
 - Sand takes increasing role to protect rail line in San Clemente, California – Trains Online, May 5, 2024
 - 7 Scenic Train Trips On The West Coast Worth Trying This Summer – The Travel, May 11, 2024
 - Revealed: The Most Scenic Train Journey In Your State – MSN, June 21, 2024

Amtrak Pacific Surfliner Adds Additional Trains for X Games Ventura 2024

Partnership Provides Convenient and Scenic Train Travel Options for Action Sports Fans



The Amtrak® Pacific Surfliner® will add two extra trains per day from Friday, June 28 through Sunday, June 30, 2024, to accommodate the expected increase in travelers for the highly anticipated X Games Ventura 2024 event. This is the second annual partnership between the Pacific Surfliner, the X Games, Ventura County Coast, and the Ventura Visitors and Convention Bureau (Visit Ventura) to support sustainable travel to the event.



Photo Courtesy of Amtrak® Pacific Surfliner®

"The success of last year's partnership underscored the immense potential for long-term synergy between our organizations. With our Ventura stop located just steps away from all the action, Pacific Surfliner is an easy choice to avoid traffic, while enjoying the scenic views of the coastline. The Corridor Agency Board of Directors is proud to support sustainable mobility options for our community."



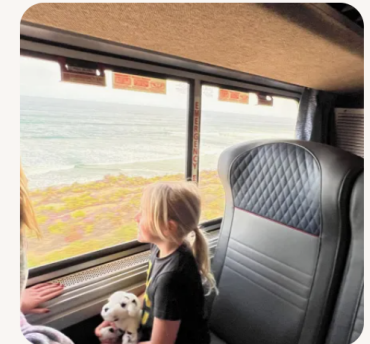
The App Pregnancy Ages & Stages Family Life Travel Shopping Entertainment Gift Cards

Sign up Log in

Family Travel Tips & Inspiration

With 29 stations from San Diego to San Luis Obispo, the Pacific Surfliner offers an ideal travel option for families. Additionally, the M&T commemorates the X Games.

We Tried Amtrak's Pacific Surfliner & Here's Why It's the Perfect Family Getaway



Melissa Heckscher

Avoiding the CA freeways is a major win.

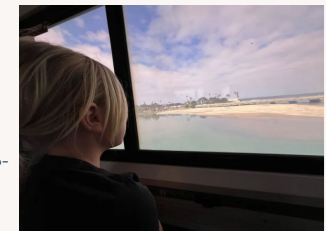
By Melissa Heckscher May 22, 2024

LA is known for a lot of things: Sunny weather. Towering palm trees. Hollywood.

And freeways.

Consequently, driving out of town for a SoCal staycation—the whole, 10-to-the-110-to-the-405 thing— is sometimes more hassle than it's worth. Especially when you've got little ones strapped in for the ride.

Enter Amtrak's Pacific Surfliner. A 351-mile train service that runs between San Diego and San Luis Obispo, this coast-hugging train is for travelers who love a scenic road trip but don't want to deal with the actual road. It's basically Pacific Coast Highway, without the harrowing drive.

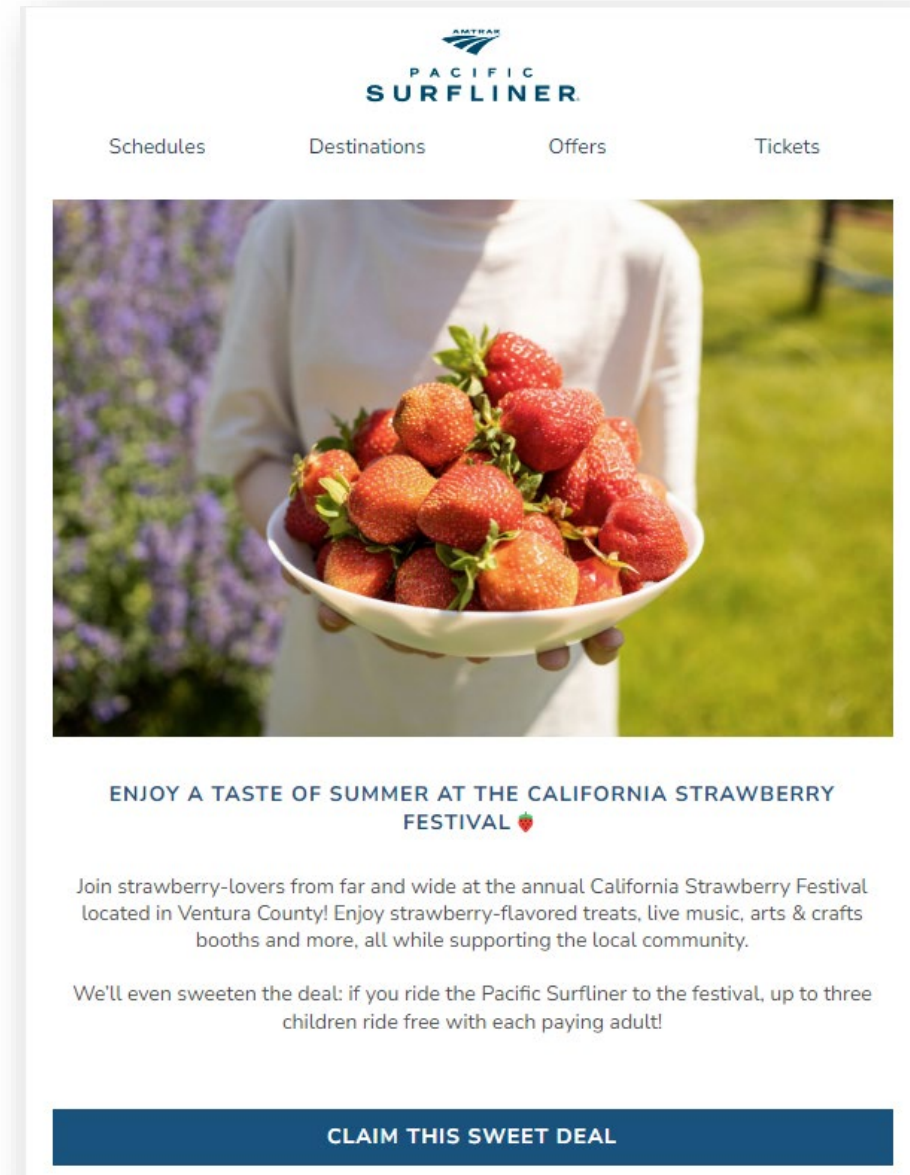


Pacific Surfliner Newsletter

- Subscription-based newsletter highlighting service offerings and regional events
- Distributed monthly
- 21,226 total recipients

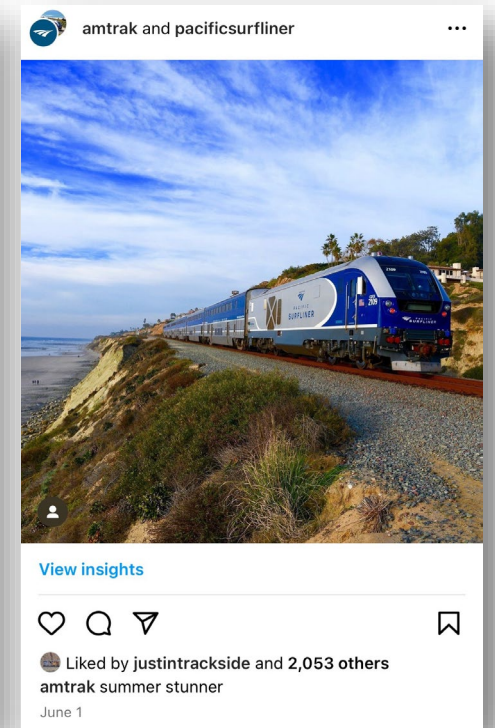
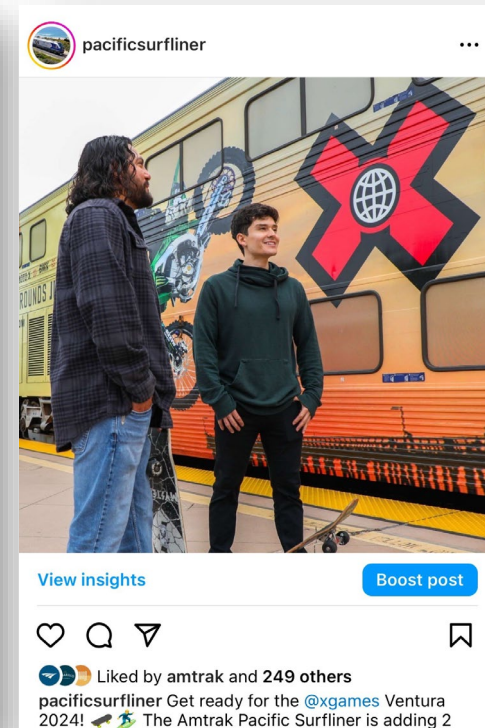
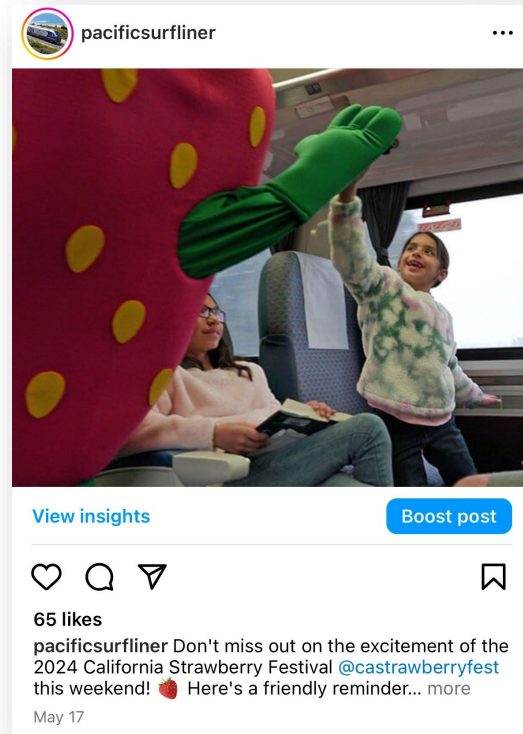
46.7%
Open Rate

4.6%
Click Rate




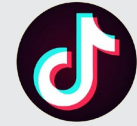


Social Media – Q4

- **55 posts, 18,248 likes, 1,974 comments**
- Content examples:
 - Del Mar Track Closure
 - Strawberry Festival
 - X Games
 - Bringing pets on board
 - Taking train to Padres games
 - Celebrate Pride Month
 - Upgrading to Business Class
 - Santa Barbara Solstice Festival



Social Media Metrics – Q4

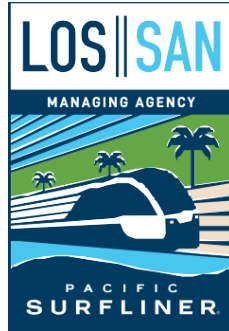
Platform	Total Followers	New Followers	Engagement*	Link Clicks
	52,900	390	11,800	22,600
	23,300	2,200	17,600	1,100
	17,900	459	N/A	N/A
	1,494	119	7,270	15

*Engagement: Shares, comments/replies, likes, video views, etc.

Quarter 1 FY2023-24

- Summer Events
 - Del Mar Races
 - Comic-Con
- Summer Travel Tips
- Rail Safety Month
- Powered by Sustainable Fuel signs
- Sparks Partnership
- Angels Partnership

Questions?



**Los Angeles – San Diego – San Luis Obispo
Rail Corridor Agency**

DRAFT

**Upcoming Agenda Items
Board of Directors Meeting
November 18, 2024**

- 2025 Los Angeles - San Diego - San Luis Obispo Rail Corridor Agency Legislative Program
- Proposed 2025 Board of Directors and Executive Committee Meetings Calendar
- Marketing Update for the Fourth Quarter of Fiscal Year 2023-24