



October 8, 2020

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Metrolink Fiscal Year 2019-20 Performance Report

Overview

The Southern California Regional Rail Authority is a five-member joint powers authority that operates the 400-mile commuter rail service known as Metrolink. A report on Metrolink ridership, revenue, and on-time performance for service in Orange County covering fiscal year 2019-20 is provided for Board of Directors' consideration.

Recommendation

Receive and file as an information item.

Background

The Southern California Regional Rail Authority's (Metrolink) membership includes the Los Angeles County Metropolitan Transportation Authority (LA Metro), the Orange County Transportation Authority (OCTA), the Riverside County Transportation Commission, the San Bernardino County Transportation Authority, and the Ventura County Transportation Commission (VCTC). Metrolink operates 169 weekday trains on seven lines, serving 62 stations, and carries approximately 35,000 riders each weekday.

In response to the coronavirus (COVID-19) pandemic and the resulting decrease in ridership, Metrolink implemented a temporary 30 percent systemwide service reduction in March 2020. Weekday trains were reduced from 169 to 115 systemwide. The change resulted in a 16.7 percent reduction of service on the three lines that serve Orange County. Metrolink will continue to operate with reduced service, incrementally restoring service as demand warrants, with the anticipation that pre-COVID-19 service levels will be fully reinstated by the third quarter of fiscal year (FY) 2020-21.

In addition to fare revenue, Metrolink is funded by its member agencies, with formulas based upon several factors covering each aspect of operations, maintenance, rehabilitation, and capital.

Metrolink service in Orange County includes three lines (OC Metrolink), with pre- and post-COVID-19 pandemic service levels outlined below:

- OC Line:
 - Oceanside to Los Angeles via Anaheim
 - Established in 1994
 - 27 daily trains (21 trains post-COVID-19 pandemic service reduction)
- Inland Empire – Orange County (IEOC) Line:
 - San Bernardino to Oceanside via Orange
 - Established in 1995
 - 16 daily trains (14 trains post-COVID-19 pandemic service reduction)
- 91/Perris Valley (91/PV) Line:
 - Perris to Los Angeles via Fullerton
 - Established in 2002
 - 11 daily trains (ten trains post-COVID-19 pandemic service reduction)

Metrolink trains serve 11 Orange County stations daily and carry an average of 14,413 daily passengers on OC Metrolink for the full FY, down 22.3 percent compared to the prior FY. Weekend service is offered on all three lines, with 16 trips on Saturday and Sunday.

Metrolink service along portions of each line in Orange County shares the corridor with the state-supported intercity passenger rail service known as the Amtrak Pacific Surfliner, managed by the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency with OCTA serving as the current managing agency.

The Rail 2 Rail (R2R) Program, which began in 2003, allows Metrolink monthly passholders the option of riding Amtrak Pacific Surfliner trains at no additional charge to the rider, if the rider travels within the stations identified on their monthly pass. Amtrak Pacific Surfliner monthly pass holders may also ride any Metrolink train within the station pairs of their monthly pass. The R2R Program is fully funded by the three member agencies that benefit from the program: LA Metro, VCTC, and OCTA, with OCTA contributing 66 percent.

Discussion

This report provides an update on Metrolink weekday and weekend ridership, revenue, and on-time performance (OTP) for FY 2019-20 by line. All performance data is obtained directly from Metrolink, unless otherwise noted. Service operated as outlined above pre-COVID-19 was reduced in March, and most impacts from the COVID-19 pandemic were realized in the last quarter of the FY. Metrolink performance: ridership, revenue, and OTP are detailed in Attachment A.

Ridership

Total Ridership

Weekday and weekend ridership combined for FY 2019-20 for OC Metrolink was 3.9 million, which represents a 23.6 percent decrease compared to the previous FY, as shown in the table below.

Total Boardings			
Line	FY 2018-19	FY 2019-20	Percent Change
OC Line	2,864,777	2,158,259	-24.7%
IEOC Line	1,315,621	1,015,806	-22.8%
91/PV Line	893,079	700,553	-21.6%
OC Metrolink	5,073,477	3,874,618	-23.6%
Systemwide	11,935,362	9,357,013	-21.6%

A quarterly ridership breakdown for OC Metrolink is provided below to show the impact of the COVID-19 pandemic on ridership through the FY, which shows a decline in the third and fourth quarters.

Total Boardings by Quarter				
	Quarter	FY 2018-19	FY 2019-20	Percent Change
OC Metrolink	Q1	1,315,084	1,329,985	1.1%
	Q2	1,254,275	1,277,507	1.9%
	Q3	1,226,349	1,153,217	-6.0%
	Q4	1,277,770	113,909	-91.1%
	Total	5,073,477	3,874,618	-23.6%

Each OC Metrolink line was impacted in the fourth quarter of FY 2019-20, as follows:

- OC Line - 92.6 percent decrease
- IEOC Line - 89.2 percent decrease
- 91/PV Line - 89.1 percent decrease

Average Weekday Ridership

As Southern California's commuter rail system, weekday commuters are Metrolink's key market, and schedules are optimized to serve that market. In FY 2019-20, there were 14,413 combined average weekday boardings on OC Metrolink, representing a decline of 22.3 percent compared to the prior year.

The OC Metrolink lines, stations, and boardings are geographically portrayed in Attachment B. The table below shows the change in average weekday station boardings in FY 2018-19 compared to FY 2019-20.

Average Weekday Station Boardings			
Orange County Station	FY 2018-19	FY 2019-20	Percent Change
Fullerton	1,651	1,269	-30.1%
Irvine	1,431	1,074	-33.3%
Tustin	1,198	922	-30.0%
Santa Ana	817	629	-30.0%
Orange	639	504	-26.7%
Buena Park	594	462	-28.5%
Anaheim	542	423	-28.0%
Laguna Niguel/Mission Viejo	327	263	-24.3%
Anaheim Canyon	307	240	-27.7%
San Juan Capistrano	143	111	-28.7%
San Clemente (North Beach)	102	74	-37.7%

In addition to local OC Bus routes that connect to rail stations, OCTA operates StationLink and iShuttle routes that are designed to meet certain trains. These rail feeder buses provide a commuter link to major employment centers, with nearly 1,350 average weekday boardings prior to the COVID-19 pandemic and 95 average weekday boardings post-COVID-19 pandemic (compared to 1,700 the previous year). StationLink service has been maintained with no reductions through the COVID-19 pandemic, whereas the iShuttle routes were suspended with plans to restore service once Metrolink ridership demand recovers following the COVID-19 pandemic. OCTA also provides the OC Flex on-demand shuttle service that serves the Laguna Niguel/Mission Viejo Station in one of its zones. Connections to OC Bus and OC Flex service are free with valid Metrolink fare. OC Flex serving the Metrolink station averaged 687 per month from July to March 2020 and dropped to a 217-monthly average from April to June 2020, or post-COVID pandemic.

Weekend Ridership

Metrolink weekend service began in 2006 with two roundtrips on the OC Line. There are currently four weekend roundtrips on the OC Line, two on the IEOC Line, and two on the 91/PV Line. Weekend service on the 91/PV Line extension began October 2019.

Combined weekend ridership on OC Metrolink lines during FY 2019-20 reached approximately 336,000 boardings. This represents a decrease of 26.4 percent compared to FY 2018-19. To encourage weekend ridership recovery, OCTA continues to promote Metrolink weekend service through Metrolink weekend campaigns, which feature exclusive deals and travel itineraries. The following table details weekend ridership by line.

Total Weekend Ridership			
Line	FY 2018-19	FY 2019-20	Percent Change
OC Line	227,147	166,930	-26.5%
IEOC Line	155,367	112,005	-27.9%
91/PV Line	73,794	56,986	-22.8%
OC Metrolink	456,308	335,921	-26.4%
Systemwide	1,028,937	770,579	-25.1%

Revenue

Systemwide revenue for FY 2019-20 was \$62 million, a 27.4 percent decrease from FY 2018-19. Annual revenue for OC Metrolink totaled \$27.3 million, which represents a 30.8 percent decrease from the previous FY, due to the COVID-19 pandemic. Revenue for OC Metrolink is 44 percent of the systemwide total of \$62 million.

Passenger fare revenue covers roughly half of Metrolink operating expenses, with the remainder covered by other revenues and member agency subsidies. The OC Line consistently has the highest farebox recovery rate, for FY 2019-20 projected farebox recovery was 65.1 percent, exceeding the systemwide projection of 34.3 percent. A summary of Metrolink revenue is depicted in the following table.

Metrolink Total Revenue			
Line	FY 2018-19	FY 2019-20	Percent Change
OC Line	\$ 22,495,173	\$ 16,901,989	-33.1%
IEOC Line	\$ 7,443,678	\$ 5,839,660	-27.5%
91/PV Line	\$ 5,758,327	\$ 4,548,926	-26.6%
OC Metrolink	\$ 35,697,178	\$ 27,290,575	-30.8%
Systemwide	\$ 79,007,225	\$ 62,018,826	-27.4%

On-Time Performance

Trains can be delayed for a variety of reasons, including equipment issues, unscheduled delays (or meets) with other trains, delays from other operators utilizing the same tracks, construction or track maintenance, and incidents. Metrolink's OTP goal is 95 percent. A train is defined as on-time if it arrives at its destination within five minutes of its scheduled arrival time. In FY 2019-20, Metrolink operated at a 95.1 percent systemwide on-time performance, a 2.4 percentage point increase from the prior year. The OC, IEOC, and 91/PV lines averaged 92.9, 94.3, and 94.7 percent OTP, respectively, for FY 2019-20. OTP improved significantly in the third and fourth quarters of the FY, including all the lines that operate in OC.

Key Initiatives FY 2019-20

Metrolink undertook several efforts to enhance service during the year. The list below highlights some of these efforts:

- *Smarter. Better. Essential.* Campaign: Metrolink launched a clean commute campaign in response to the COVID-19 pandemic, by increasing the cleaning and safety procedures onboard and at stations. The cleaning measures include an enhanced nightly train deep cleaning, the addition of more staff to perform touch-point cleaning, the purchase of electrostatic sprayers that disinfect passenger cars, and the installation of two hand sanitizer stations on each train car. To enhance safety, Metrolink installed decals on trains that remind riders to practice social distancing and highlight Metrolink's cleaning measures. Metrolink requires staff and riders to wear masks while onboard trains; if a rider does not have a mask or face covering, Metrolink conductors may provide one.
- The Metrolink Recovery Plan Framework is designed to protect employees and customers against the spread of COVID-19 while taking a phased approach to position Metrolink as smarter, better, and essential for post-stay-at-home operations:
 - Health and Safety
 - Operational Transparency
 - The Triple Bottom Line: Economy, Environment, Equity
 - Future Proof Operations: More Efficient Stewardship
 - Sustainable Financial Performance

- In July 2020, the OCTA Board of Directors approved the use of \$64,633,169 in Coronavirus Aid, Relief, and Economic Security Act funds for Metrolink operations. Metrolink has begun to draw down the funds to offset fare revenue shortfalls and to cover additional cleaning practices noted above.
- Special Trains – In response to the COVID-19 pandemic, Metrolink suspended special train service until further notice. The following special trains took place before the COVID-19 pandemic in FY 2019-20:
 - Los Angeles Rams: In coordination with member agencies, Metrolink operated special train service on the OC and 91/PV lines to four 2019 regular season Los Angeles Rams football home games at the Los Angeles Coliseum. On average during the regular season, boardings on game days nearly tripled compared to boardings on a typical Sunday.
 - Holiday Express Train: Metrolink debuted an interactive seasonal-themed special train that featured carolers, holiday characters, and decorations. The special train operated on the OC, Ventura County, and Antelope Valley lines. The OC Line train operated from the Laguna Niguel/Mission Viejo Station to Oceanside and back with no stops. The Holiday Express Train was a success, with 98.5 percent of tickets for the OC Line event sold.
- Tier 4 Locomotives: Metrolink currently has 37 of the 40 Tier 4 locomotives operating in its fleet, with the final three scheduled to be placed in service this fall. The Tier 4 Locomotive project received environmental certification in September 2020 from the California Air Resources Board, a designation that affirms Metrolink's commitment to reducing greenhouse gas emissions. As of May 2020, Metrolink removed its last Tier 0 Locomotive from service.
- New Fare Pilot Programs: As part of Metrolink's ridership recovery plan, Metrolink launched two new fare pilot programs: 'Kids Ride Free' on Weekends and the 5-Day Flex Pass.
- New Ticket Vending Devices: Metrolink completed the installation of 133 new ticket vending machines at all 62 stations as of June 2020. The machines' interface and technology are more reliable, user-friendly, and provide convenience and time savings.

Summary

This report provides an update on OC Metrolink commuter rail ridership, revenue, and OTP for FY 2019-20. Total ridership was 3.9 million boardings, a 23.6 percent decrease over the prior year, with the COVID-19 pandemic impacting both weekday and weekend ridership. Annual revenue for OC Metrolink totaled \$27.3 million, which represents a 30.8 percent decrease from the previous FY. The OC, IEOC, and 91/PV lines averaged 92.9, 94.3, and 94.7 percent OTP, respectively, for the period covered in this report.

Attachments

- A. Metrolink Fiscal Year 2019-20 Performance Report
- B. Metrolink Average Weekday Station Boardings (FY2019-20)

Prepared by:

Megan LeMaster
Principal Transportation Analyst
(714) 560-5601

Approved by:

Jennifer L. Bergener
Chief Operating Officer, Operations/
Deputy Chief Executive Officer
(714) 560-5462