Agenda for Today

- Process Overview
  - Making it Happen: Options for Caltrain Service Over the Next Decade
    - CalMod: Improved Service in the 2020s
    - Going beyond CalMod
    - Ridership Forecasts (2020-2030)
  - Work in Progress & Next Steps
Process Overview

What is the Caltrain Business Plan?

**What**
Addresses the future potential of the railroad over the next 20-30 years. It will assess the benefits, impacts, and costs of different service visions, building the case for investment and a plan for implementation.

**Why**
Allows the community and stakeholders to engage in developing a more certain, achievable, financially feasible future for the railroad based on local, regional, and statewide needs.
What Will the Business Plan Cover?

Technical Tracks

**Service**
- Number of trains
- Frequency of service
- Number of people riding the trains
- Infrastructure needs to support different service levels

**Business Case**
- Value from investments (past, present, and future)
- Infrastructure and operating costs
- Potential sources of revenue

**Community Interface**
- Benefits and impacts to surrounding communities
- Corridor management strategies and consensus building
- Equity considerations

**Organization**
- Organizational structure of Caltrain including governance and delivery approaches
- Funding mechanisms to support future service

Timeline

- **July 2018 – July 2019**: Development and Evaluation of Growth Scenarios
- **October 2019**: Adoption of Long-Range Service Vision
- **Fall 2019**: Rounding Out the Vision and Implementation Planning
- **Winter 2019-2020**: Completion of Business Plan
- **Spring 2020**: 

With a 2040 Service Vision adopted, what will the next 10 years look like for Caltrain? What are the key actions and steps we need to focus on next?

Additional technical and policy analysis is underway to focus on what Caltrain can achieve over the next decade and the key near-term steps and work that will be needed to make it happen.

Building towards the Vision with service concepts for initial electrification and options for growth and investment through 2020s

Accompanying financial projections and funding plan

Identification of a program of key planning, policy and organizational next steps

With a 2040 Service Vision adopted, how can Caltrain “Round Out” its vision for the future?

Analysis of connections to other systems & station access options

Equity analysis & focus on making Caltrain accessible to all

Review of funding options and revenue generation opportunities to support the Vision

Additional technical and policy analysis are underway with a focus on areas that were highlighted as important through stakeholder outreach and help complete the picture of the railroad Caltrain hopes to become.
Caltrain’s 2040 Service Vision
Illustrative Service Details

| Trains per Hour, per Direction | Peak: 8 Caltrain + 4 HSR  
| Off-Peak: Up to 6 Caltrain + 3 HSR |
| Stopping Pattern | Local / Express with timed transfer in Mid Peninsula |
| Travel Time, STC-Diridon | 61 Min (Express)  
| 85 Min (Local) |
| New Passing Tracks | Millbrae, Hayward Park-Hillsdale, Redwood City area, Northern Santa Clara County, Blossom Hill |
| Service Plan Description | • Local and Express trains each operating at 15-minute frequencies with timed cross-platform transfer at Redwood City  
| • All trains serve Sales For Transit Center  
| • Trains serve Capitol and Blossom Hill every 15 minutes and Morgan Hill and Gilroy every 30 minutes  
| • Skip stop pattern for some mid-Peninsula stations |
### Caltrain’s 2040 Service Vision - Investments

**Capital Costs**

- **$23 Billion Total Capital Costs**
- **$9.4B Grade Separations**
- **$7.8B Terminal Improvements**
- **$3.3B Rail Infrastructure and Systems**
- **$1.4B Station Improvements**
- **$1.1B Fleet Upgrades**

Capital costs include all projects from SF to Gilroy, knitting together a connected corridor with greatly improved service.

### Operating Costs

- **$370 Million 2040 Annual Operating Costs**

Caltrain is one of the leanest, most efficient transit services in the country. Today’s annual operating and maintenance costs are $135 million, and 73% is covered by fares. The vision would benefit from a similarly high farebox recovery ratio.

#### Getting to the 2040 Vision

The “path” of milestone service improvements and investments used in initial Business Plan work was based on a simplified version of the existing plans of Caltrain and its partner agencies.

<table>
<thead>
<tr>
<th>Design Year</th>
<th>Event</th>
<th>Milestone Details</th>
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</thead>
<tbody>
<tr>
<td>2018</td>
<td>Diesel Fleet</td>
<td>5 Caltrain trains per hour, per direction (phpd), existing varied schedule, Hourly off peak service</td>
</tr>
<tr>
<td>2022</td>
<td>Start of Electrified Operations</td>
<td>6 Caltrain trains phpd, skip stop service, Expansion to 7-car trains, 30 minute off peak service</td>
</tr>
<tr>
<td>2029</td>
<td>HSR Valley to Valley &amp; Downtown Extension</td>
<td>6 Caltrain trains phpd, Full electrification and expansion to 8-car trains, 30 minute off peak service, Service to Downtown SF via DTX, Up to 2 HSR phpd</td>
</tr>
<tr>
<td>2033</td>
<td>High Speed Rail Phase 1, SF to LA</td>
<td>6 Caltrain trains phpd, 8-car trains, skip stop service, 30 minute off peak service, Service to Downtown SF via DTX, Up to 4 HSR phpd</td>
</tr>
<tr>
<td>2040</td>
<td>Service Vision</td>
<td>8 Caltrain trains phpd, regular express + local service, Up to 10-car train lengths, Up to 10 min off peak service, Service to Downtown SF via DTX, Significantly increased service to South San Jose and South Santa Clara County, Up to 4 HSR phpd</td>
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</table>
Getting to the 2040 Vision

With a long-range Service Vision established, we can optimize our approach. We can explore different “paths” or incremental steps that allow us to deliver improved service sooner.

The path Caltrain ultimately takes will be based on our ability, and the ability of our partners, to fund and implement key investments.

Key Questions for the Next Decade

What is the potential market demand for Caltrain service over the next 10 years – how can we grow to satisfy it?

Which benefits of the 2040 Service Vision could Caltrain deliver before 2030?
  • How can we use the initial electrified system (CalMod) to deliver near-term service benefits and best meet market demand?
  • How could we improve service further through subsequent incremental investments?
CalMod: Improved Service in the 2020s

Market Analysis

Additional Slides Included In Appendix
Understanding Demand

Daily ridership demand for Caltrain service will likely exceed 90,000 passengers in the next decade. This growth is driven by several factors:

**Latent Demand**
Improving Caltrain service and increasing capacity will make Caltrain more appealing for a wider range of trips.

**Population and Employment Growth**
Station areas will add over 100,000 new residents and employees within ½ mile of Caltrain stations, a ~30% increase over existing.

**Improved Connectivity**
New connections like the Central Subway will extend Caltrain’s reach.

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**Caltrain Corridor – Approved Growth**

**Population Growth**

**Job Growth**

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(population and job growth maps with color-coded areas indicating growth levels)
Capitol and Blossom Hill have large populations that are underserved by Caltrain, while Morgan Hill, San Martin, and Gilroy have comparatively lower demand.

Operational Constraints
Under the current agreement with Union Pacific, Caltrain can add up to two additional roundtrips to Gilroy to reach five trips per day. There is limited flexibility in when these trips can be added without affecting mainline service.

Two of these roundtrips could be extended south to Salinas subject to further planning and agreement by both the Caltrain Board and Union Pacific.
### Existing Ridership by Station

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<tr>
<th>Highest Ridership</th>
<th>Moderate Ridership</th>
<th>Lower Ridership</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt;4,000 Daily Riders</td>
<td>2,000 – 4,000 Daily Riders</td>
<td>&lt;2,000 Daily Riders</td>
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</tbody>
</table>

- 4th & King
- Redwood City
- Palo Alto
- Mountain View
- San Jose Diridon
- Millbrae
- San Mateo
- Hillsdale
- Sunnyvale
- 22nd Street
- Bayshore
- South San Francisco
- San Bruno
- Broadway
- Burlingame
- Hayward Park
- Belmont
- San Carlos
- Atherton
- Menlo Park
- California Ave
- San Antonio
- Lawrence
- Santa Clara
- Tamien
- Capitol
- Blossom Hill
- Morgan Hill
- San Martin
- Gilroy

### Potential 2020s Demand by Station

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<tr>
<th>Highest Ridership Potential</th>
<th>Moderate Ridership Potential</th>
<th>Lower Ridership Potential</th>
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<tr>
<td>&gt;4,000 Daily Riders</td>
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- 4th & King
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- Tamien
- Capitol
- Blossom Hill
- Morgan Hill
- San Martin
- Gilroy

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**Existing Ridership:**

- 5 stations with >4,000 Daily Riders
- 4 stations with 2,000 – 4,000 Daily Riders
- 20 stations with <2,000 Daily Riders

**Potential 2020s Demand:**

- 8 stations with >4,000 Daily Riders
- 9 stations with 2,000 – 4,000 Daily Riders
- 13 stations with <2,000 Daily Riders
Potential 2020s Demand by Station

- **Highest Ridership Potential** >4,000 Daily Riders
  - 4th & King
  - 22nd Street
  - Millbrae
  - Redwood City
  - Palo Alto
  - Mountain View
  - Sunnyvale
  - San Jose Diridon
- **Moderate Ridership Potential** 2,000 – 4,000 Daily Riders
  - Bayshore
  - South San Francisco
  - San Mateo
  - Hillsdale
  - Menlo Park
  - California Ave
  - San Antonio
  - Lawrence
  - Santa Clara
- **Lower Ridership Potential** <2,000 Daily Riders
  - San Bruno
  - Broadway
  - Burlingame
  - Hayward Park
  - Belmont
  - San Carlos
  - Atherton
  - Tamien
  - Capitol
  - Blossom Hill
  - Morgan Hill
  - San Martin
  - Gilroy

Stations experiencing significant changes

Train Capacity and Crowding

Even with increased service, crowding will continue to be an issue for Caltrain over the next decade as demand for service increases.

- Caltrain provides approximately 3,800 seats per direction per peak hour today, which will increase to 4,144 with electrification.
- With standing room, Caltrain's hourly capacity peak hour capacity will increase from about 4,500 passengers per direction today to 5,400 with electrification, assuming even distribution of passengers between trains.
How Can we Improve Service and Meet Market Demand Using CalMod?

The electrification of the Caltrain service between San Francisco and San Jose provides a transformative, near-term opportunity to improve service.

With this investment, Caltrain can begin delivering many, but not all, of the service improvements described 2040 Service Vision while also attempting to keep pace with growing market demand.

While CalMod provides an overwhelming improvement to the system as a whole we will still need to make choices about which service benefits and improvements we prioritize – there are tradeoffs.
Building Blocks of Service Planning:
Mainline Stopping Patterns

Mainline times shown for San Francisco (4th & King) to San Jose (Diridon)

Local  80 Minutes
*Connects all stations regardless of demand*

Skip Stop or Zone  70-75 Minutes
*Varied patterns connect some stations with higher demand*

Express  60-67 Minutes
*Connects a few stations with highest demand*

Analytical Approach: Combinations of Skip Stop, Zone, and Express patterns were evaluated for peak service. While local service is part of the 2040 Service Vision, it is not yet viable during peak hours due to infrastructure and fleet limitations.

Building Blocks of Service Planning:
Travel Time vs. Frequency

Reduce Travel Times between Major Stations
- Minimize stops to save a few minutes in travel times for many passengers
- Demand in growing markets continues to be underserved

Increase Frequency at More Stations
- Add stops and keep travel times about the same
- Serve more demand in growing markets

Analytical Approach: Service concepts tend to prioritize improving frequency over travel time given recent and projected growth patterns along the Caltrain corridor.
Building Blocks of Service Planning:
Standardization vs. Customization

**Standardized Schedule**
- Repeating clockface patterns
- Symmetrical in both directions
- Typically communicated as “lines” (eg the “A Line”)

**Customized Schedule**
- Complex patterns that may vary by time of day
- May not be symmetrical in both directions
- Typically communicated as individual train numbers

**Analytical Approach:** Concepts developed focus on standardized, bi-directional schedules to create a more user-friendly experience and facilitate coordination with the region’s larger transit network.

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Building Blocks of Service Planning:
Combining Service Patterns

**Mixing Different Service Patterns**
- Passengers choose between different train types
- Demand can be concentrated on some very crowded trains, while other trains may be half empty

**Similar Service Patterns**
- Train types are broadly similar in terms of overall stopping structure and time between major stations
- Demand is more evenly distributed between trains – helping maximize overall throughput

**Analytical Approach:** Both parallel and differentiated service patterns have been considered.
## Introducing Four Service Concepts

<table>
<thead>
<tr>
<th>Service Concept</th>
<th>Zone 1</th>
<th>Zone 2</th>
<th>Zone 3</th>
<th>Express</th>
<th>Minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Two Zones with Express</td>
<td>2 trains/hour</td>
<td>2 trains/hour</td>
<td>2 trains/hour</td>
<td>2 trains/hour</td>
<td>74/70/57 min</td>
</tr>
<tr>
<td>Three Zones</td>
<td>2 trains/hour</td>
<td>2 trains/hour</td>
<td>2 trains/hour</td>
<td>2 trains/hour</td>
<td>71/71/70 min</td>
</tr>
<tr>
<td>Skip Stop with Express</td>
<td>2 trains/hour</td>
<td>2 trains/hour</td>
<td>2 trains/hour</td>
<td>2 trains/hour</td>
<td>75/75/60 min</td>
</tr>
<tr>
<td>Distributed Skip Stop</td>
<td>2 trains/hour</td>
<td>2 trains/hour</td>
<td>2 trains/hour</td>
<td>2 trains/hour</td>
<td>71/71/71 min</td>
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</table>

<table>
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<tr>
<th>Trains per hour:</th>
<th>6</th>
<th>4</th>
<th>2</th>
<th>6</th>
<th>2</th>
<th>2</th>
<th>6</th>
<th>2</th>
<th>6</th>
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</table>
Service Concept Evaluation Metrics

1 - Service Metrics
   I. Travel Time
   II. Maximum Wait Time

2 - Capacity Metrics
   I. Crowding
   II. Ability to Support Ridership Growth

3 - User Experience
   I. Internal Connectivity
   II. External Connectivity

Summary – Comparison to Existing Service

<table>
<thead>
<tr>
<th>Metric</th>
<th>Two Zone with Express</th>
<th>Three Zone</th>
<th>Skip Stop with Express</th>
<th>Distributed Skip Stop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel Time</td>
<td>Similar</td>
<td>Similar</td>
<td>Similar</td>
<td>Similar</td>
</tr>
<tr>
<td>Maximum Wait Time</td>
<td>Slightly Better</td>
<td>Slightly Better</td>
<td>Slightly Better</td>
<td>Better</td>
</tr>
<tr>
<td>Throughput Capacity &amp; Crowding</td>
<td>Slightly Better</td>
<td>Slightly Better</td>
<td>Similar</td>
<td>Better</td>
</tr>
<tr>
<td>Able to Support Significant Ridership Growth</td>
<td>Partially</td>
<td>Partially</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Internal Connectivity</td>
<td>Similar</td>
<td>Similar</td>
<td>Similar</td>
<td>Similar</td>
</tr>
<tr>
<td>External Connectivity</td>
<td>Slightly Better</td>
<td>Slightly Better</td>
<td>Slightly Better</td>
<td>Better</td>
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</tbody>
</table>
## Summary – Comparison to Existing Service

<table>
<thead>
<tr>
<th>Metric</th>
<th>Two Zone with Express</th>
<th>Three Zone Skip Stop</th>
<th>Distributed Skip Stop</th>
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</thead>
<tbody>
<tr>
<td>Travel Time</td>
<td>Similar</td>
<td>Similar</td>
<td>Similar</td>
</tr>
<tr>
<td>Maximum Wait Time</td>
<td>Slightly Better</td>
<td>Slightly Better</td>
<td>Better</td>
</tr>
<tr>
<td>Throughput Capacity &amp; Crowding</td>
<td>Slightly Better</td>
<td>Partially</td>
<td>Removed from Consideration</td>
</tr>
<tr>
<td>Able to Support Significant Ridership Growth</td>
<td>Partially</td>
<td>Partially</td>
<td>Yes</td>
</tr>
<tr>
<td>Internal Connectivity</td>
<td>Similar</td>
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<td>Slightly Better</td>
<td>Better</td>
</tr>
</tbody>
</table>

### Service Levels at Stations

- Market Analysis
- Planning Priorities
- Service Concepts & Evaluation
- Service Levels at Stations
- Illustrative Service Plans
Service Frequency Improvements

To aid in comparison, all of the service concepts have been developed using a uniform set of illustrative frequency assumptions (e.g., there is no difference between concepts in the number of stops a specific station receives).

All service concepts double the number of stations that receive at least four trains per hour, per direction.

All service concepts provide at least two trains per hour, per direction to all mainline, regularly served stations.

Service Comparison at Stations

<table>
<thead>
<tr>
<th></th>
<th>&lt;2 TPH</th>
<th>2-3 TPH</th>
<th>4-5 TPH</th>
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</thead>
<tbody>
<tr>
<td>Existing - SB AM/NB PM</td>
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<td></td>
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</tr>
<tr>
<td>Existing - NB AM/SB PM</td>
<td>&lt;2 TPH</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Train Service Plans</td>
<td>2 TPH</td>
<td>4 TPH</td>
<td>6 TPH</td>
</tr>
</tbody>
</table>

Illustrative Service Levels

Service levels shown are illustrative. Final service planning and schedule development for CalMod will involve consideration of additional data and public input and may include considerations related to:

- Current Market Demand and Ridership Patterns
- Approved Station Area Growth
- Station Access and Connectivity Opportunities
- Social Equity and Geographic Equality
- Transportation Demand Management Policies
Illustrative Peak Period Service Levels by Station (Mainline)

Change in Peak Period Service Levels
- Service Increases (17 Stations)
- No Change (4 Stations)
- Service Reduction (3 Stations)

Existing NB AM/SB PM
Existing SB AM/NB PM

Hourly Service levels are the same for all service concepts

Trains per Hour per Direction by Station

Illustrative Service Plans

Market Analysis Planning Priorities Service Concepts & Evaluation Service Levels at Stations Illustrative Service Plans
Caltrain has prepared two sets of illustrative service plans to carry forward for further analysis.

**Two Zone with Express** — two zone patterns (north and south of Redwood City) with a regional express pattern offering different travel times and wait times.

**Distributed Skip Stop** — three skip stop patterns offering similar travel times and regular wait times at major stations.

Caltrain will increase service to Gilroy to four roundtrips per day. Passengers from south of Tamien would have a one-seat ride to major stations and a transfer at Diridon Station to reach minor stations.

Arrival and departure times would be similar to today, with one later AM train and one later PM train. Service may be extended to Salinas, pending key agreements and funding, adding about one hour to travel times.
Off-Peak and Weekend Service

With electrification, Caltrain has the opportunity to increase off-peak and weekend service levels to better meet corridor demand.

However, operational and financial constraints may affect what kind of service Caltrain is able to provide and when.

Goals

- Increase Caltrain’s market share during off-peak and weekend periods
- Offer competitive travel times between major stations
- Provide a legible schedule transition between peak and off-peak (Two Zone with Express concept has some advantages in this regard)
- Maintain flexibility to accommodate construction and maintenance windows

Example Off-Peak Pattern

Implementation Process and Next Steps

This analysis has been developed to provide updated concepts for how the investments currently being made as part of CalMod can be used to serve market demand and begin delivering some of the key benefits of the 2040 Service Vision

Preferred concepts shown will be used to continue planning for various aspects of CalMod implementation and launch of electrified service in 2022.

Developing a Final Service Plan for CalMod

- Preferred Service Concepts shown are illustrative and are intended to help advance analysis and planning
- As the PCEP approaches completion, Caltrain will undertake a supplemental planning process to determine the final 6tph schedule that the railroad will operate – this will include;
  - Selecting the ultimate concept or “style” of service to be operated
  - Determining individual station service levels
  - Confirming off-peak and weekend service levels
- This process will include additional public and stakeholder input as well as analysis of updated ridership and survey data
Going Beyond CalMod

Paths to Incrementally Improving and Increasing Service

CalMod will provide tremendous service benefits to the corridor. However, regional growth projections suggest that there is medium-term demand for even more service and capacity.

Getting to the 2040 Vision

2018 Diesel Fleet
2022 Start of Electrified Operations
2040 Service Vision

The following analysis considers options for how Caltrain could accelerate the delivery of key elements of the 2040 Service Vision to better meet demand by the late 2020s.
Adding Capacity and Increasing Service to Grow Ridership

Toward the end of the 2020s, Caltrain is expected to reach capacity during peak hours.

Caltrain will not be able to accommodate additional ridership growth in the 2030s without adding capacity. This poses a challenge for accommodating land use growth, DTX, Dumbarton rail, and other potential changes on the corridor.

While smaller, interim improvements may ease capacity, the most significant improvement to service and capacity involves expanding service to eight trains per hour, per direction.

An Interim Step- Not the Full 2040 Service Vision

Increasing mainline service in the mid- to late 2020’s would be an interim step- not the full implementation of the 2040 Service Vision.

Major investments at terminals and in passing tracks infrastructure are not assumed.

Making near-term, tactical investments to increase service to 8 trains per hour per direction would precede the full buildout of the 2040 Service Vision. As such, many important aspects of the 2040 Service Vision would not yet be fully achieved, including:

- Ability to operate a peak-hour express / local service pattern with timed transfers
- Ability to lengthen trains to 8- or 10-cars
- Direct service to downtown San Francisco
- Greatly expanded and electrified service south of Tamien Station to Gilroy

Fully achieving the 2040 Service Vision would require the overall buildout discussed and documented in the Business Plan process to date.
An 8-train Caltrain service would likely look like a hybrid of the zone express and skip stop patterns with 8 trains per hour, per direction.

There is limited flexibility in the service structure due to lack of new passing tracks and the constraints of Caltrain’s existing signal system.

Diesel service to/from Gilroy would terminate at San Jose with a timed transfer mainline service. This service could be increased to 5 round trips per day and would have more flexibility to customize departure and arrival times based on public input.

Increasing service from six to eight trains per hour, per direction enables more frequent service to more stations.

With an interim 8 tphpd service, 20 of 24 mainline stations would receive at least four trains per hour, per direction, and nearly half of stations would receive eight trains per hour, per direction.
Increasing Service to Stations

20 stations could receive at least four trains per hour, per direction.

Illustrative Change in Peak Period Service Levels

- Illustrative service at expanded “8tph plan”
- Illustrative service at initial CalMod level
- Existing NB AM/SB PM
- Existing SB AM/NB PM

Overall Investments

The following parallel and programmatic investments are assumed to be occurring throughout the 2020’s- they are needed to support the overall success of the system and the full implementation of the 2040 Service Vision

Grade Separations
Planning and construction of grade separations and grade crossing improvements

Station Improvements
Programmatic improvements to Caltrain stations and investments in station access and connectivity

Major Investments
Work on major terminal projects (including Diridon and DTX), major station investments, and partner projects including HSR
What Specific Incremental Investments and Changes Would be Needed?

The following key investments would specifically be needed to implement an interim 8-tph service. These investments are consistent with the overall program assumed in the 2040 Service Vision.

**Expanded EMU Fleet**
To provide 8 tphpd direction mainline service, Caltrain will need to expand its EMU fleet.

**Holdout Rule Elimination**
Once 8 trains per hour per direction are operating on the corridor, remaining “holdout” rule stations will need to be rebuilt or closed.

**More Train Storage**
The railroad will need to add storage capacity to accommodate additional trainsets.

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What Specific Incremental Investments and Changes Would be Needed?

The following key investments would specifically be needed to implement an interim 8-tph service. These investments are consistent with the overall program assumed in the 2040 Service Vision.

**Level Boarding**
Level boarding is needed to ensure reliability and to keep dwell times as short as possible.

**Gilroy-SJ Shuttle Service**
Remaining diesel service south of Tamien would be converted to a shuttle service until the UP corridor is rebuilt and electrified. Service levels could be increased to 5 round trips per day under existing agreements with UP.

**Minor Track Work**
Minor track work would be needed to accommodate increased train volumes around Diridon Station.
Ridership Forecasts
2020-2030

Caltrain is near-capacity today, which limits ridership growth.

Service improvements from electrification adds 21,000 riders over three years.

Increasing service to 8 trains adds 20,000 riders over three years.

<table>
<thead>
<tr>
<th>Year</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
<th>2024</th>
<th>2025</th>
<th>2026</th>
<th>2027</th>
<th>2028</th>
<th>2029</th>
<th>2030</th>
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<tr>
<td>Daily Ridership</td>
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<td>52,000</td>
<td>54,000</td>
<td>56,000</td>
<td>58,000</td>
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<td>62,000</td>
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<td>70,000</td>
<td>72,000</td>
<td>74,000</td>
<td>76,000</td>
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<td>Electrification Service Plans (6 TPH Peak in 2022)</td>
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<td>Expanded Service (8 TPH in 2027)</td>
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<td></td>
</tr>
</tbody>
</table>
Ridership Forecasts, 2019-2030

<table>
<thead>
<tr>
<th>Ridership Unit</th>
<th>2019 5 TPH</th>
<th>2025 6 TPH</th>
<th>2030 6 TPH</th>
<th>2030 8 TPH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Weekday</td>
<td>63,400</td>
<td>86,500</td>
<td>92,900</td>
<td>113,200</td>
</tr>
<tr>
<td>Average Weekend Day</td>
<td>11,800</td>
<td>23,600</td>
<td>25,200</td>
<td>25,200</td>
</tr>
<tr>
<td>Annual</td>
<td>18.4M</td>
<td>26.1M</td>
<td>28.1M</td>
<td>33.6M</td>
</tr>
</tbody>
</table>

Note: Ridership forecasts are relatively comparable between zone express and skip stop patterns in 2025. 2030 Forecasts assume no DTX, which may add another 30,000 weekday riders (~9M annually) after opening.

Over the next decade, Caltrain could nearly double ridership by increasing service from five to eight trains and doubling to quadrupling service at many stations.

By 2025, Caltrain could serve about 35% more passengers than today with either zone express or skip stop service.

Work in Progress
Station Access Work Plan

The Business Plan presents an opportunity to evaluate Caltrain’s current role in station access and how this role may need to change over time to support the service vision.

The Business Plan will provide a high-level assessment of potential paths forward at a system-level, but will not address investment needs at individual stations.

What role does Caltrain play in station access?

• Review existing programs and investments

What is Caltrain’s station access vision?

• Consider several paths forward:
  a. A hands-off approach
  b. A proactive investment in parking
  c. A proactive investment in multimodal access

How do we get there?

• Identify most pressing access needs and priorities

Equity Assessment Work Plan

The equity assessment is intended to help us understand how the Service Vision could improve equitable access to Caltrain and develop a series of policy interventions that would improve equitable access further.

Opportunities & Challenges

• Review of existing plans
  • Stakeholder interviews
  • Market assessment

Analysis of the Service Vision

• Qualitative & quantitative evaluation of the Service Vision

Recommendations

• Context-specific recommendations as outcomes from the analysis of the Service Vision and opportunities and challenges.
Funding Work Plan

Service Vision includes $25.3 Billion in corridor investments by Caltrain, cities and partner agencies and operating costs of $370 M/year by 2040.

This phase of work will identify new funding and revenue sources to support the increase in capital and operating costs.

The funding work plan will develop:

• 10-year Funding Plans to support incremental increases in service from 2019-2029
• A Funding and Revenue Strategy to support the full implementation of the Service Vision by 2040

FOR MORE INFORMATION
WWW.CALTRAIN2040.ORG
BUSINESSPLAN@CALTRAIN.COM
650-506-6499
Appendix

Market Analysis

Additional Slides Included In Appendix

- Market Analysis
- Planning Priorities
- Service Concepts & Evaluation
- Service Levels at Stations
- Illustrative Service Plans
### Near-Term Growth: County-Level Findings

<table>
<thead>
<tr>
<th>County</th>
<th>Population Growth Pipeline</th>
<th>Job Growth Pipeline</th>
<th>Total Population + Job Growth</th>
<th>% Growth over Existing</th>
<th>% of Growth within ½ mile of Caltrain</th>
<th>% of Growth within 2 miles of Caltrain</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Francisco</td>
<td>99,600</td>
<td>78,000</td>
<td>177,600</td>
<td>11%</td>
<td>23%</td>
<td>82%</td>
</tr>
<tr>
<td>San Mateo</td>
<td>30,400</td>
<td>56,700</td>
<td>87,100</td>
<td>7%</td>
<td>37%</td>
<td>87%</td>
</tr>
<tr>
<td>Santa Clara</td>
<td>82,700</td>
<td>122,600</td>
<td>205,300</td>
<td>7%</td>
<td>17%</td>
<td>64%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>212,700</strong></td>
<td><strong>257,300</strong></td>
<td><strong>470,000</strong></td>
<td><strong>8%</strong></td>
<td><strong>23%</strong></td>
<td><strong>75%</strong></td>
</tr>
</tbody>
</table>

Inventory of all development projects that are approved or under construction in cities along the Caltrain Corridor to assess mid-2020s demand:
- Based on review of City planning websites
- Excludes developments proposed/under review and growth allowed under specific plans that has not resulted in individual project entitlements
- Prorates major SF developments like Candlestick Point based on latest information on phasing

### Near-Term Growth: Corridor-Level Findings

<table>
<thead>
<tr>
<th>Distance</th>
<th>Category</th>
<th>Under Construction</th>
<th>Approved</th>
<th>Total Growth</th>
<th>Mid-2020s Estimate</th>
<th>% Growth over Existing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within ½ Mile of Stations</td>
<td>Population</td>
<td>195,000</td>
<td>24,600</td>
<td>32,100</td>
<td>56,800</td>
<td>251,800</td>
</tr>
<tr>
<td></td>
<td>Jobs</td>
<td>196,300</td>
<td>28,200</td>
<td>28,500</td>
<td>56,700</td>
<td>253,000</td>
</tr>
<tr>
<td></td>
<td>Population + Jobs</td>
<td>391,300</td>
<td>52,800</td>
<td>60,600</td>
<td>113,400</td>
<td>504,800</td>
</tr>
<tr>
<td>Within 2 Miles of Stations</td>
<td>Population</td>
<td>1,599,700</td>
<td>85,000</td>
<td>98,500</td>
<td>183,500</td>
<td>1,783,100</td>
</tr>
<tr>
<td></td>
<td>Jobs</td>
<td>1,423,100</td>
<td>132,800</td>
<td>68,600</td>
<td>201,400</td>
<td>1,624,500</td>
</tr>
<tr>
<td></td>
<td>Population + Jobs</td>
<td>3,022,700</td>
<td>217,900</td>
<td>167,100</td>
<td>384,900</td>
<td>3,407,600</td>
</tr>
</tbody>
</table>
Today, Caltrain carries up to 3,900 passengers per hour at its peak load points. 7 trains exceed a comfortable crowding level of 900 passengers during peak periods. Caltrain would need to accommodate 4,500-5,000 passengers per peak hour at 80,000-90,000 daily riders, which approaches the throughput capacity of a six-train mixed fleet (5,400). The effective capacity of the system may be lower depending on the degree to which trains are differentiated:

- Differentiating faster and slower trains reduces Caltrain’s effective capacity by concentrating demand on a few trains
- Similar service patterns across all trains maximizes the effective capacity by spreading demand evenly across all trains

There is substantial unmet demand for midday and weekend Caltrain service, although this demand is difficult to measure.
Off-Peak & Weekend Service

Measured Against US-101 Trips
Traffic volumes on US-101 no longer experience peak periods; there is all-day bidirectional travel and intermittent congestion.

Yet, Caltrain’s share of US-101 in/out of San Francisco is 10 times higher during peak periods than off-peak and weekend periods.

Off-Peak & Weekend Service

Measured Against BART Ridership
Caltrain serves more peak period passengers than BART traveling between the Peninsula and San Francisco, but BART serves three times more passengers during off-peak times.

BART provides six times more service than Caltrain during off-peak times, but connects fewer people and jobs on the Peninsula than Caltrain.
Introducing Four Service Concepts

| Service Concept                  | Zone 1 2 trains/hour | Zone 2 2 trains/hour | Zone 3 2 trains/hour | Express 2 trains/hour | Run Time
|----------------------------------|----------------------|----------------------|----------------------|-----------------------|-----------
| Two Zones with Express           |                      |                      |                      |                       | 74 min    |
|                                  |                      |                      |                      |                       | 70 min    |
|                                  |                      |                      |                      |                       | 57 min    |
| Three Zones                      |                      |                      |                      |                       | 71 min    |
|                                  |                      |                      |                      |                       | 71 min    |
|                                  |                      |                      |                      |                       | 70 min    |
| Skip Stop with Express           | Pattern A 2 trains/hour |                      |                      |                       | 75 min    |
|                                  | Pattern B 2 trains/hour |                      |                      |                       | 75 min    |
|                                  | Express 2 trains/hour  |                      |                      |                       | 60 min    |
| Distributed Skip Stop            | Pattern A 2 trains/hour |                      |                      |                       | 71 min    |
|                                  | Pattern B 2 trains/hour |                      |                      |                       | 71 min    |
|                                  | Pattern C 2 trains/hour |                      |                      |                       | 71 min    |

Trains per hour:

6 2 4 2 6 2 6 2 6

(for all service patterns)
Service Concept Evaluation Metrics

1 - Service Metrics
   I. Travel Time
   II. Maximum Wait Time

2 - Capacity Metrics
   I. Crowding
   II. Ability to Support Ridership Growth

3 - User Experience
   I. Internal Connectivity
   II. External Connectivity

Detailed Slides Included In Appendix

Internal Connectivity

Trip Pairs with Direct Service

<table>
<thead>
<tr>
<th></th>
<th>Two Zone with Express</th>
<th>Three Zone with Express</th>
<th>Skip-Stop with Express</th>
<th>Distributed Skip Stop</th>
<th>Existing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OD Pairs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Riders with Direct Service

<table>
<thead>
<tr>
<th></th>
<th>Two Zone with Express</th>
<th>Three Zone with Express</th>
<th>Skip-Stop with Express</th>
<th>Distributed Skip Stop</th>
<th>Existing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Riders</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Graphs showing internal connectivity percentages for different service concepts.
1 - Travel Time to/from San Francisco

All four concepts offer mostly similar travel times to San Francisco compared to the 'typical best' existing travel time.

<table>
<thead>
<tr>
<th>Change in Travel Time by Station</th>
<th>Two Zone with Express</th>
<th>Three Zone with Express</th>
<th>Skip Stop with Express</th>
<th>Distributed Skip Stop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better (≥ 4 mins faster)</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>About the Same (+/- 3 mins)</td>
<td>15</td>
<td>16</td>
<td>14</td>
<td>17</td>
</tr>
<tr>
<td>Worse (≥ 4 mins slower)</td>
<td>3</td>
<td>3</td>
<td>6</td>
<td>2</td>
</tr>
</tbody>
</table>

Typical best defined as the median fastest time in the current timetable. For example, 4th & King to Diridon Baby Bullet travel times vary from 62 to 69 minutes, with a median time of 66 minutes.

1 - Change in Travel Time and Wait Time by Existing Ridership

Change in Average Travel Time by OD Pair (By Total Ridership)

<table>
<thead>
<tr>
<th>Ridership</th>
<th>Two Zone with Express</th>
<th>Three Zone with Express</th>
<th>Skip-Stop with Express</th>
<th>Distributed Skip Stop</th>
</tr>
</thead>
<tbody>
<tr>
<td>23%</td>
<td>15%</td>
<td>38%</td>
<td>12%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Change in Maximum Headway by OD Pair (By Total Ridership)

<table>
<thead>
<tr>
<th>Ridership</th>
<th>Two Zone with Express</th>
<th>Three Zone with Express</th>
<th>Skip-Stop with Express</th>
<th>Distributed Skip Stop</th>
</tr>
</thead>
<tbody>
<tr>
<td>23%</td>
<td>16%</td>
<td>26%</td>
<td>14%</td>
<td>30%</td>
</tr>
</tbody>
</table>
1 - Travel Time & Wait Time Systemwide

1 – Service Comparison to Existing

<table>
<thead>
<tr>
<th>Metric</th>
<th>Two Zone with Express</th>
<th>Three Zone with Express</th>
<th>Skip Stop with Express</th>
<th>Distributed Skip Stop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel Time</td>
<td>Similar</td>
<td>Similar</td>
<td>Similar</td>
<td>Similar</td>
</tr>
<tr>
<td>Maximum Wait Time</td>
<td>Slightly Better</td>
<td>Slightly Better</td>
<td>Slightly Better</td>
<td>Better</td>
</tr>
</tbody>
</table>

**Travel Times**
All concepts provide similar travel times to existing, although each pattern preferences different station pairs

**Maximum Wait Times**
All concepts provide a similar reduction in maximum wait times, although the Distributed Skip Stop is the only concept to provide regular intervals at major stations
1 – Service Comparison to Existing

<table>
<thead>
<tr>
<th>Metric</th>
<th>Two Zone with Express</th>
<th>Three Zone with Express</th>
<th>Skip Stop with Express</th>
<th>Distributed Skip Stop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel Time</td>
<td>Similar</td>
<td>Similar</td>
<td>Similar</td>
<td>Similar</td>
</tr>
<tr>
<td>Maximum Wait Time</td>
<td>Slightly Better</td>
<td>Slightly Better</td>
<td>Slightly Better</td>
<td>Better</td>
</tr>
</tbody>
</table>

**Travel Times**
All concepts provide similar travel times to existing, although each pattern preferences different station pairs.

**Maximum Wait Times**
All concepts provide a similar reduction in maximum wait times, although the Distributed Skip Stop is the only concept to provide regular intervals at major stations.

2 – Capacity Metrics

**Internal Connectivity**

**External Connectivity**
2 – Crowding Effects of Irregular Wait Times and Differentiated Service

**Passenger Loads: PM Peak**

Crowding Effects – Skip Stop with Express

Skip Stop with Express has the lowest effective capacity and least room for ridership growth.
Crowding Effects – Distributed Skip Stop

Distributed Skip Stop has the highest effective capacity and most room for ridership growth.

Wait Times at Major Stations

Depending on the service concept, Caltrain may still experience irregular wait times at major stations served by all trains. This has ramifications for Caltrain’s ability to manage crowding for trains and stations, coordinate transfers, and provide a user-friendly experience.

Only the Distributed Skip Stop concept would maintain regular 10 minute intervals serving all major stations.
2 – Crowding Comparison to Existing

<table>
<thead>
<tr>
<th>Metric</th>
<th>Two Zone with Express</th>
<th>Three Zone</th>
<th>Skip Stop with Express</th>
<th>Distributed Skip Stop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Throughput Capacity &amp; Crowding</td>
<td>Slightly Better</td>
<td>Slightly Better</td>
<td>Similar</td>
<td>Better</td>
</tr>
<tr>
<td>Ability to Support Significant Ridership Growth</td>
<td>Partially</td>
<td>Partially</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

• The Two Zone with Express and Three Zone concepts would spread riders somewhat evenly across trains, but would still experience some capacity issues due to bunching.
• The Skip Stop with Express would concentrate riders on express trains, which will not alleviate current crowding conditions or provide room for growth.
• The Distributed Skip Stop would spread riders across trains relatively evenly and maximize effective capacity.

3 - Rider Experience Metrics

- Internal Connectivity
- External Connectivity
3 - User Experience Comparison to Existing Service

<table>
<thead>
<tr>
<th>Metric</th>
<th>Two Zone with Express</th>
<th>Three Zone</th>
<th>Skip Stop with Express</th>
<th>Distributed Skip Stop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal Connectivity</td>
<td>Similar</td>
<td>Similar</td>
<td>Similar</td>
<td>Similar</td>
</tr>
<tr>
<td>External Connectivity</td>
<td>Slightly Better</td>
<td>Similar</td>
<td>Similar</td>
<td>Better</td>
</tr>
</tbody>
</table>

**Existing Riders**
All concepts serve nearly all existing riders with more frequent direct service, although none serve all existing riders.

**Intermodal Transfers**
The Distributed Skip Stop provides efficient transfers at key intermodal stations, while the Two Zone Express provides a good transfer to BART at Millbrae.

Two Zone with Expresses
Distributed Skip Stop

PEAK PERIOD
San Francisco
22nd St
Bayshore
Millbrae
Broadway
Burlingame
San Mateo
Hayward Park
Hillsdale
Belmont
San Carlos
Redwood City
Palo Alto
California Ave
San Antonio
Mountain View
Sunnyvale
Lawrence
Santa Clara
San Jose Diridon
Menlo Park
College Park
Tamien

2 Trains / Hour
Hourly stop
Express
Local
Zone Express
Skip - Stop

SF to SJ
Runtime Tam – 4th K
Diesel
EMU

XX min