

International Rail Trends



**Update on the Impact of COVID on
International Rail Operators**

Presented by:

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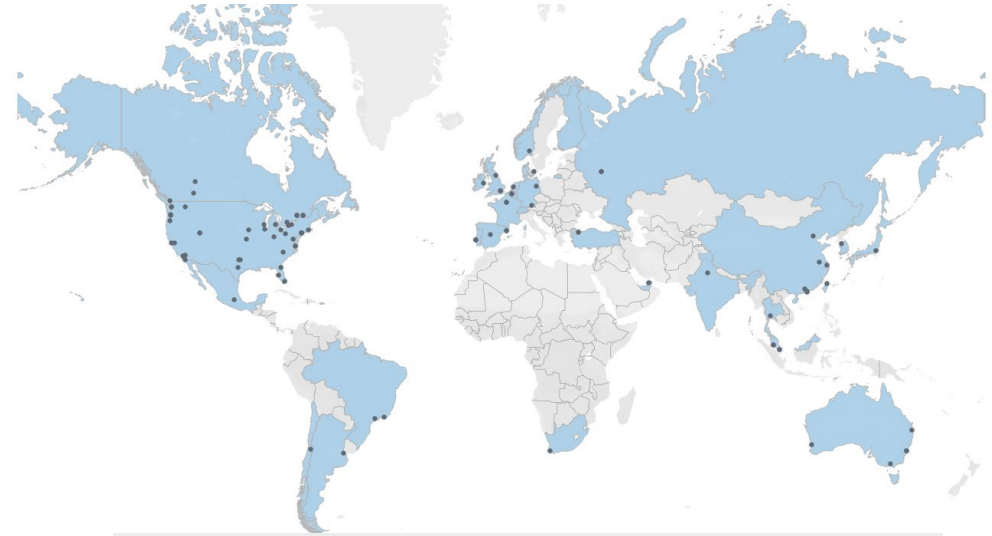
Contributors

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November 2021

**Imperial College
London**
Projects

The Transport Strategy Centre (TSC) is a Think Tank that Facilitates Benchmarking Across 30 Countries

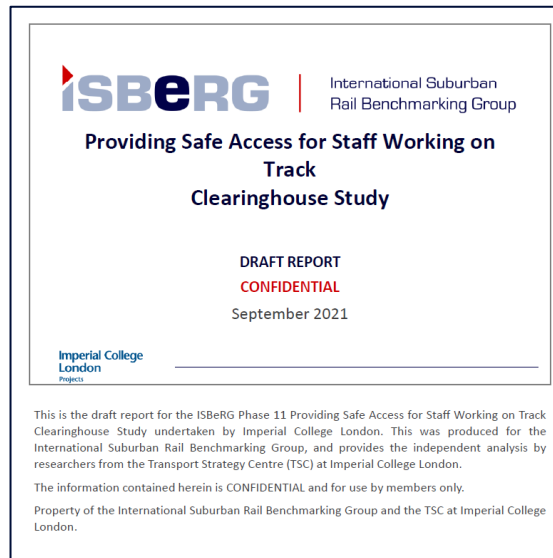


▶ Railroad operations, asset management and vehicle maintenance benchmarking

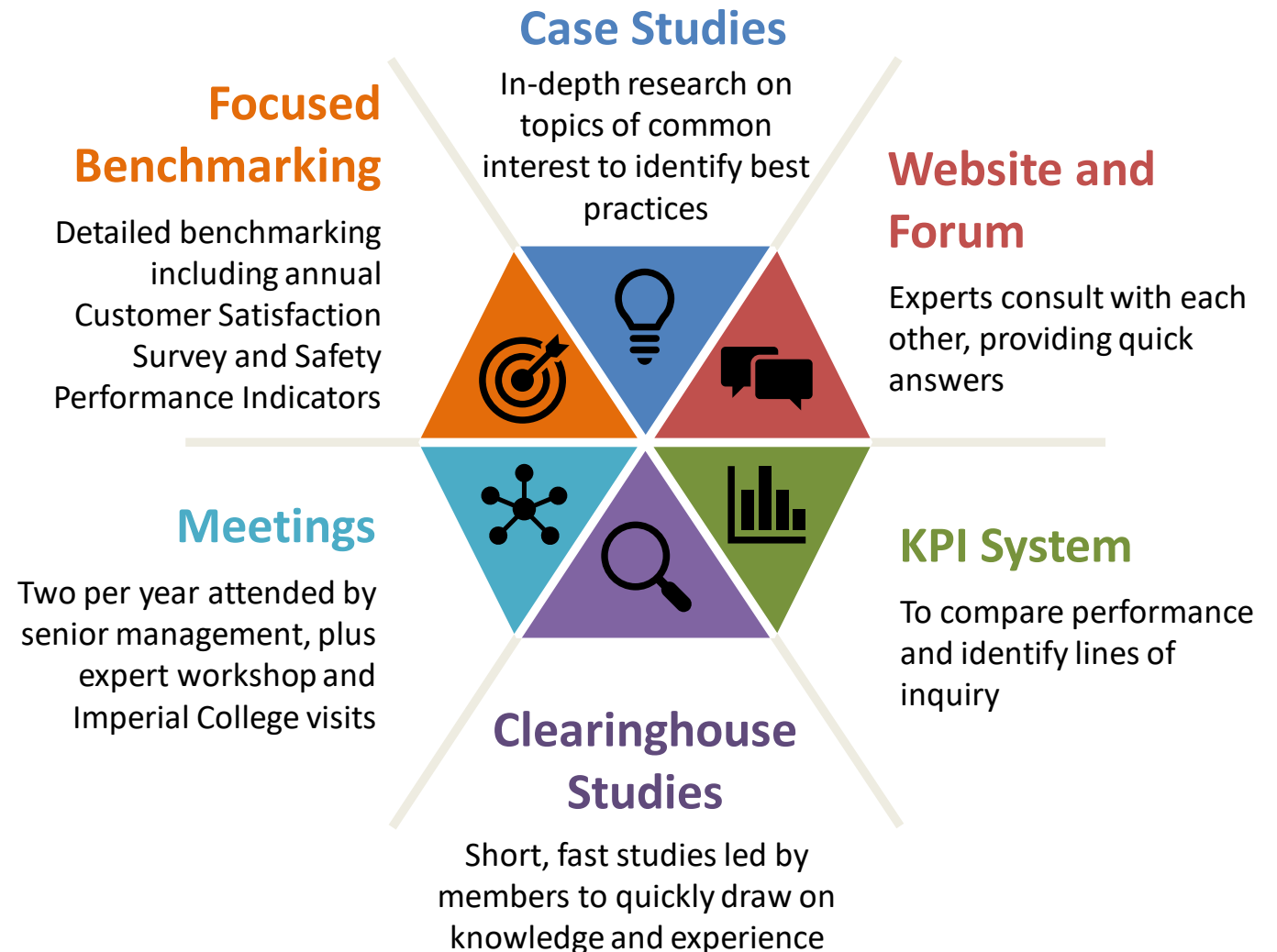


Benchmarking is a Structure Approach to Understanding Performance

- ▶ Comparing performance through data (KPIs)
- ▶ Sharing best practices via studies, meetings and forums



Benchmarking is subject to confidentiality to encourage openness and honesty

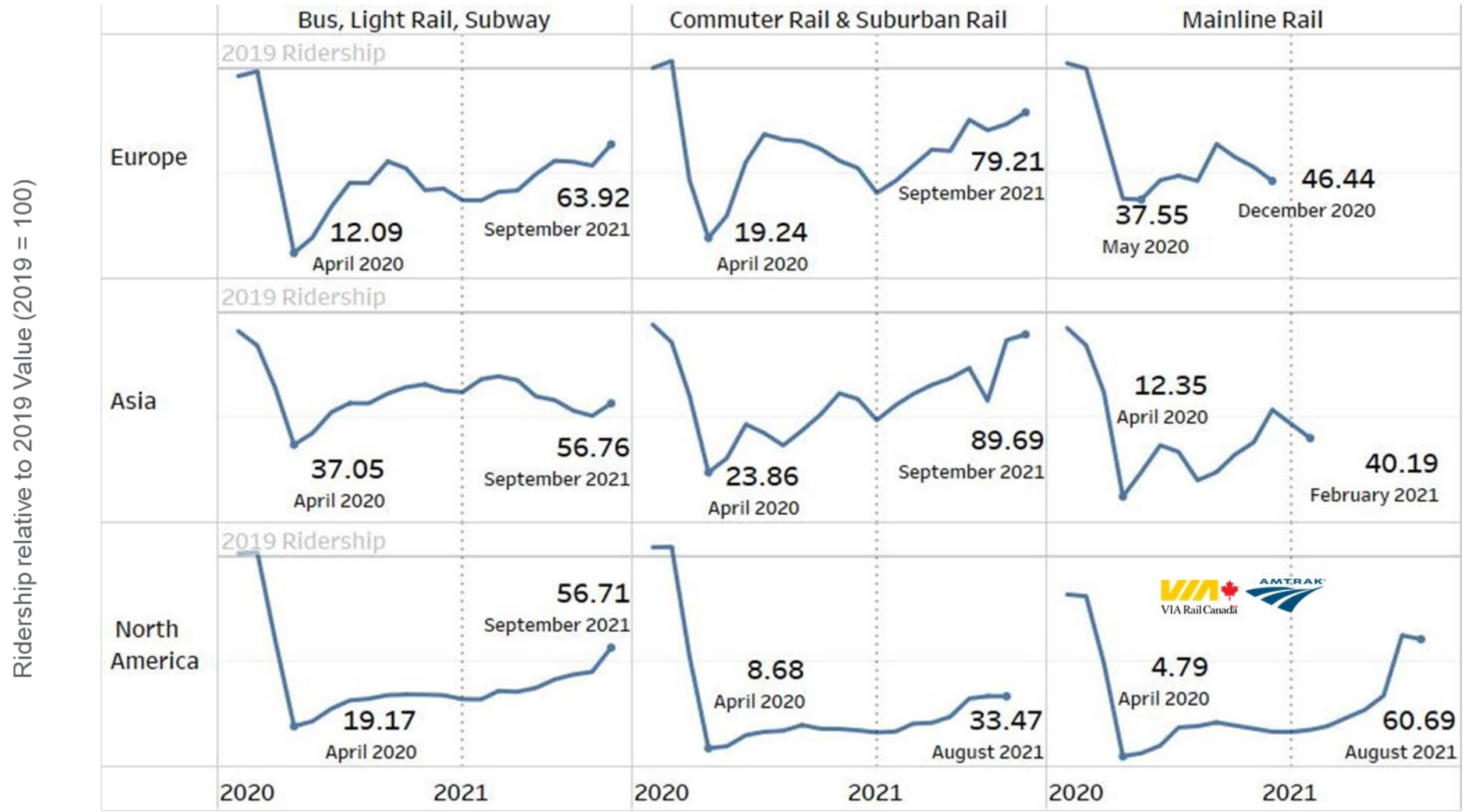


International Perspective on Transit Ridership (All Modes)

American commuter rail remains at lowest recovery rate for all modes, all continents.

Amtrak has rebounded to 60.69% of pre-pandemic ridership, indicating strong demand/growth.

Internationally, rail has rebounded at **46-75%** of pre-pandemic ridership.



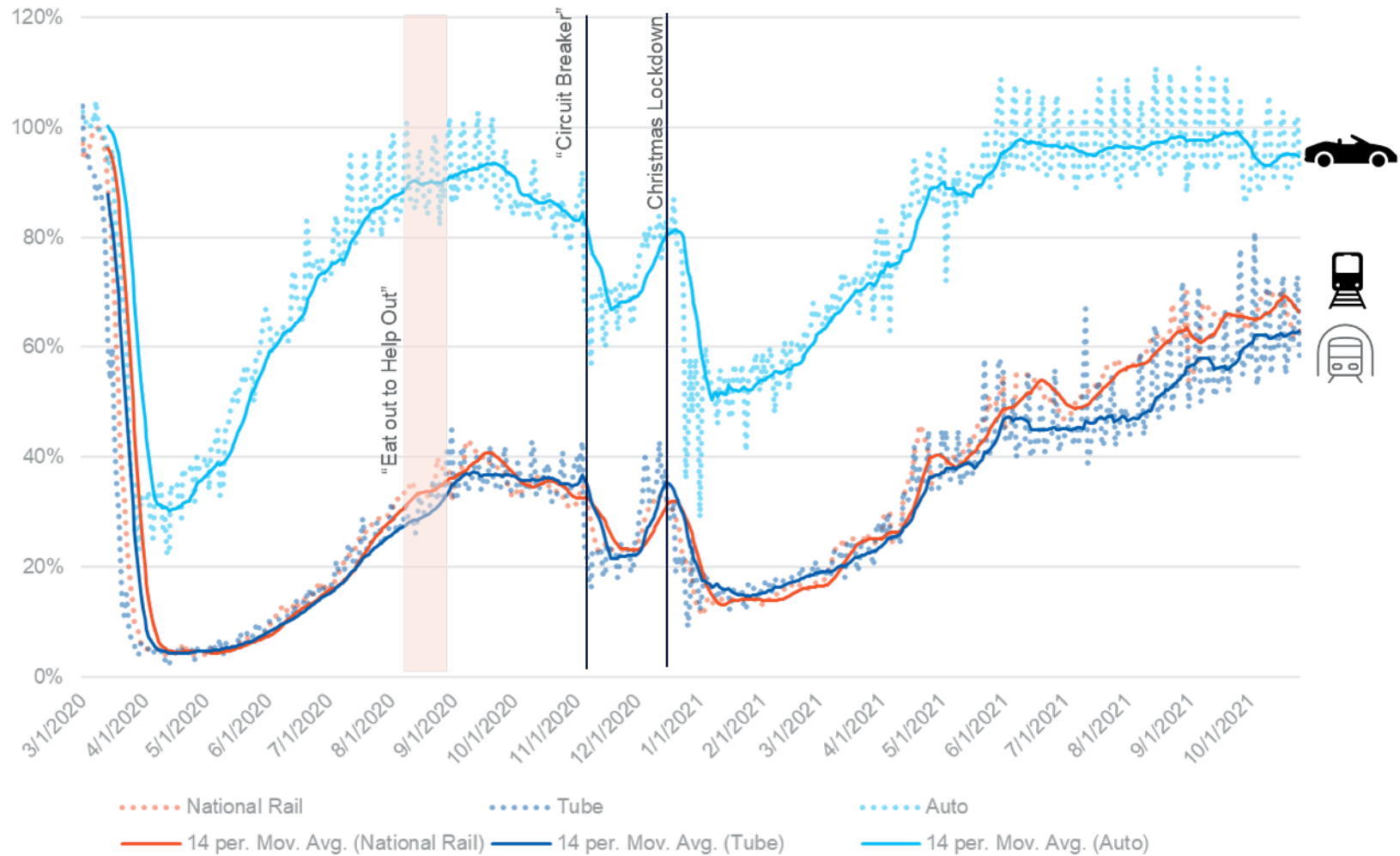
Source: TSC, NTD, agency websites

UK Railroad Ridership Compared with Tube and Auto Decline in Ridership has Led to Rethink of Governance/Funding

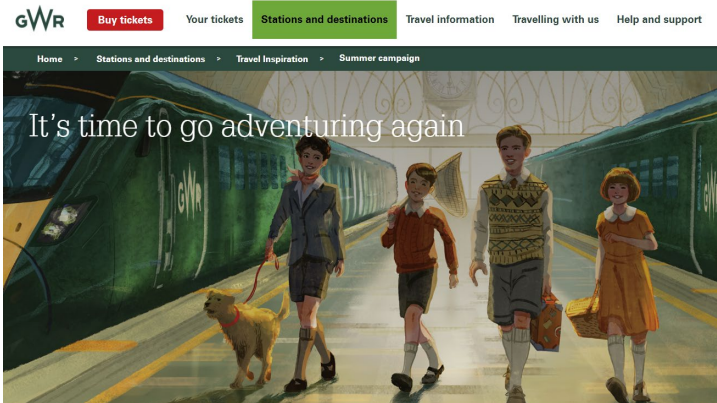
In the UK, **34% of national rail trips are for commuting** (2018 NTS) – 55% in USA

UK **Rail Ridership at 60-70%** of pre-pandemic levels

Rail exceeded tube rebound over summer – leisure travel

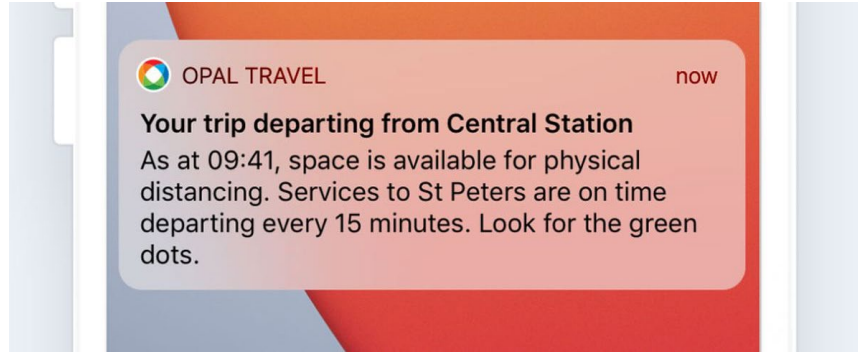


Source: UK DfT National Travel Survey

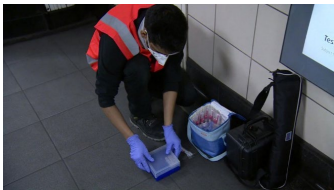


During Covid, Better Cleaning Measures And Better Information On Trip Level Crowding

Sydney Trains push notifications on crowding levels per train



Denmark's DSB began cleaning trains en-route, improving satisfaction with cleanliness and reducing cost



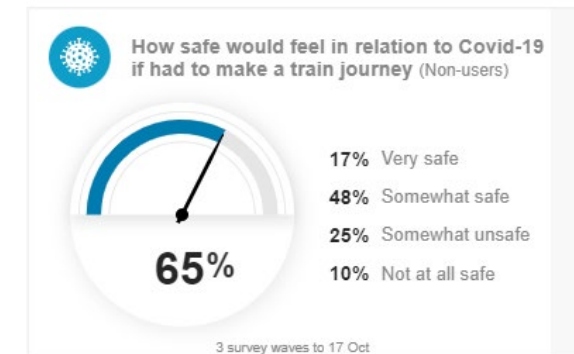
London's TfL tested surfaces and air in the system and found no evidence of Covid-19

<https://content.tfl.gov.uk/imperial-college-covid-sampling-at-tfl-phase-2-june-2021.pdf>

In the UK – Research Has Identified Five Key Areas to Help Train Operators Recover from Pandemic



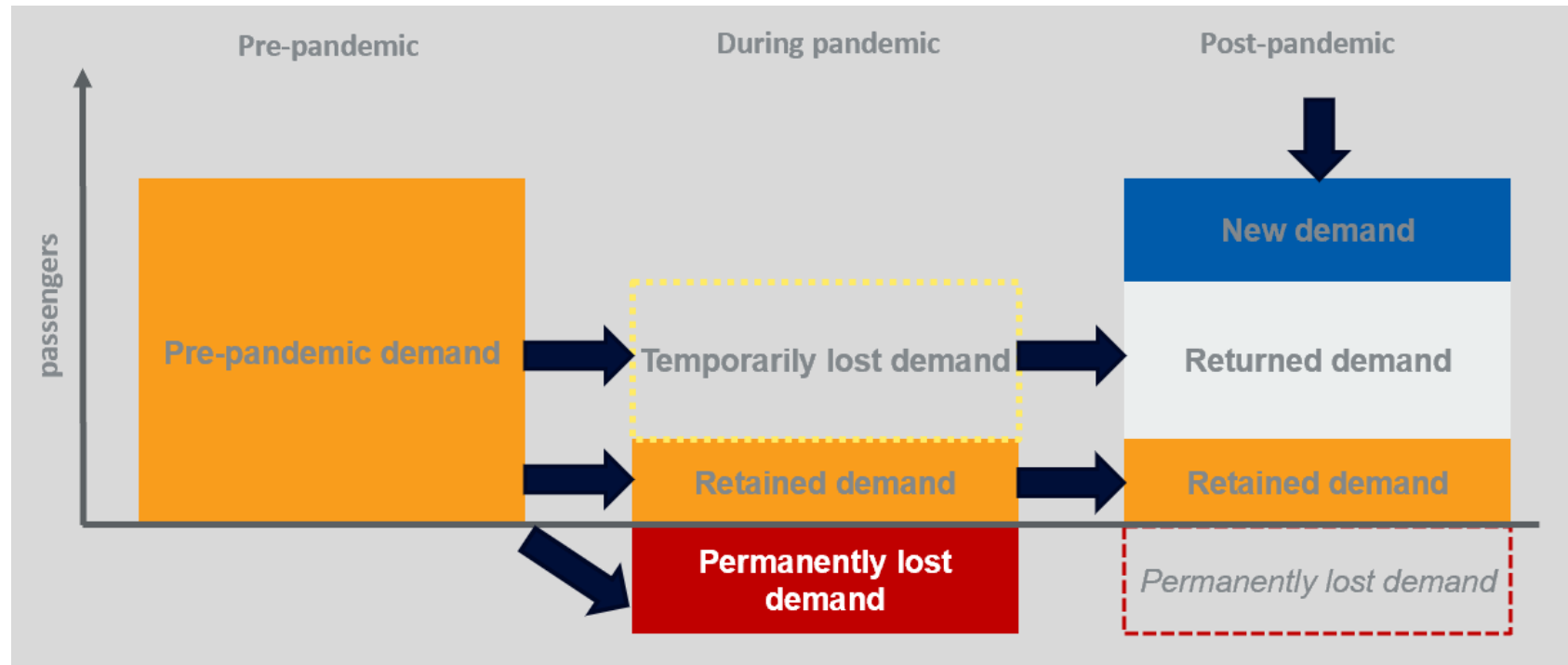
89% of existing rail users find the railway safe
65% of non-users would feel safe on the railway



1. Provide capacity to support social distancing
2. Maintain improved cleanliness and communicate effectively
3. Drive up compliance with rules (face masks)
4. More flexible fares
5. Offers and promotions to encourage lapsed users to return

Post-pandemic Demand Will Comprise Three Types Of Users: Retained, Returned And New Customers (Replacing those Lost)

- ▶ International railroads are looking at ways to attract new demand to replace any permanently lost demand



To Attract Additional Demand, Railroads are Looking to Flexible Fares

- Flexible tickets (travel X times in Y days)
- Expand passes to include parking, catering
- Encourage leisure demand via family tickets
- Implement yield pricing
- Improve refundability/flexibility

MONTHLY PASS EXTRA

New Territories Urban Area
As little as \$6.1* per trip

During these challenging days, MTR extends the special fare concessions for you. Buy a Monthly Pass Extra between July 2021 and December 2021, and enjoy \$50 discount for as little as \$6.1* per trip. Five types of Monthly Pass Extra are available. With the Monthly Pass Extra, not only will you enjoy unlimited rides between designated stations within the valid month, you will also get a 25% discount⁸ off the normal fare for journeys connecting to or from non-designated stations, giving you more savings. The Interchange Discount, the Fare Saver Discount, the Fare Rebate (if applicable) and the Early Bird Discount also apply to the Monthly Pass Extra journeys when travelling beyond designated stations (except for East Rail Line First Class Premium). To get to know how you can save more from using the Monthly Pass Extra, click here for more examples on fare savings.

Flexi Season Ticket

The Flexi Season ticket offers 8 days of travel in 28 days – any time between two stations. It's a flexible solution that's perfect if you need to travel to work a couple of times a week at peak time Monday to Friday. Commute your way. Choose WFH Wednesdays, choose face-to-face Fridays.

Flexi Season ticket
Flexi Season ticket
Commute, your way
National Rail

Get ready for Flexi Season tickets by registering for a Smartcard or downloading the app, [check with your train operator](#) to see what they offer. If you don't have a Smartcard then please allow plenty of time to get one before you travel - they can take up to 5 days to arrive by post. Find out more about [Smartcards here](#) and more information below.

What is a Flexi Season ticket?

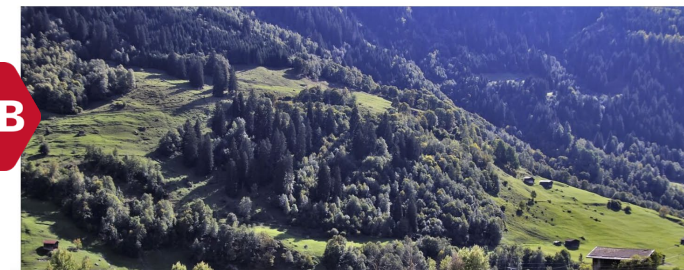
A Flexi Season ticket provides customers with 8 days of travel in 28 days - any time between two named stations.

The 8 days of travel doesn't need to be specified in advance, giving part-time commuters more flexibility to travel when they want and need. The Flexi Season ticket will offer a minimum of 20% discount on an equivalent Monthly Season ticket, offering savings for commuters travelling during peak times, 2-3 days a week

Family & Friends Railcard

DOT
Your journey: Copenhagen to ...
Bus, train and metro
Rejsekort without metro 912 DKK
Commuter20 without metro 960 DKK*
Commuter pass without metro 1.470 DKK
Single ticket 1.472 DKK
Bike 154 DKK
New car for 100.000 1.594 DKK

DSB Promo: Unlimited trips across Denmark during 8 days for 40 Euros



Categories

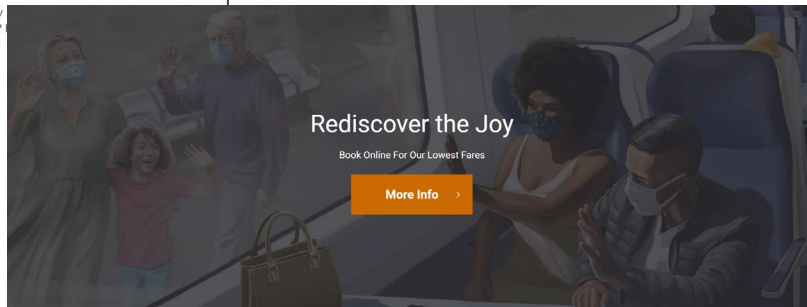
- Africa
- America
- Argentina
- Aruba
- Asia
- Australia
- Austria/Switzerland
- Balkan/Greece
- Benelux
- Bolivia
- Brazil
- Canada

To Attract Additional Demand, Railroads Looking at New Services/Advertisements



Best UK Holiday Destinations

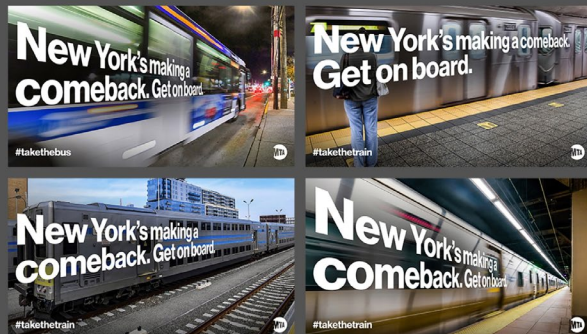
After so long cooped up indoors, the temptation is to simply revisiting former hangouts, why not explore territories new? unusual attraction; or set out to learn more about the world.



SNCB announces more trains to the coast for busy weekend ahead

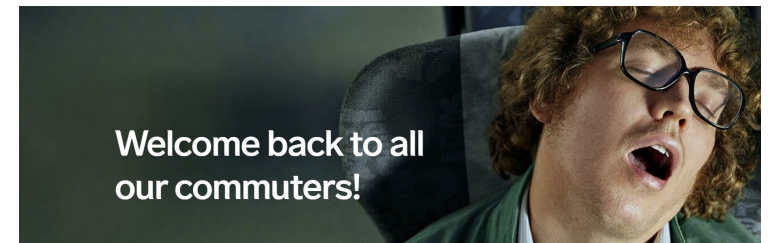


“Comeback”

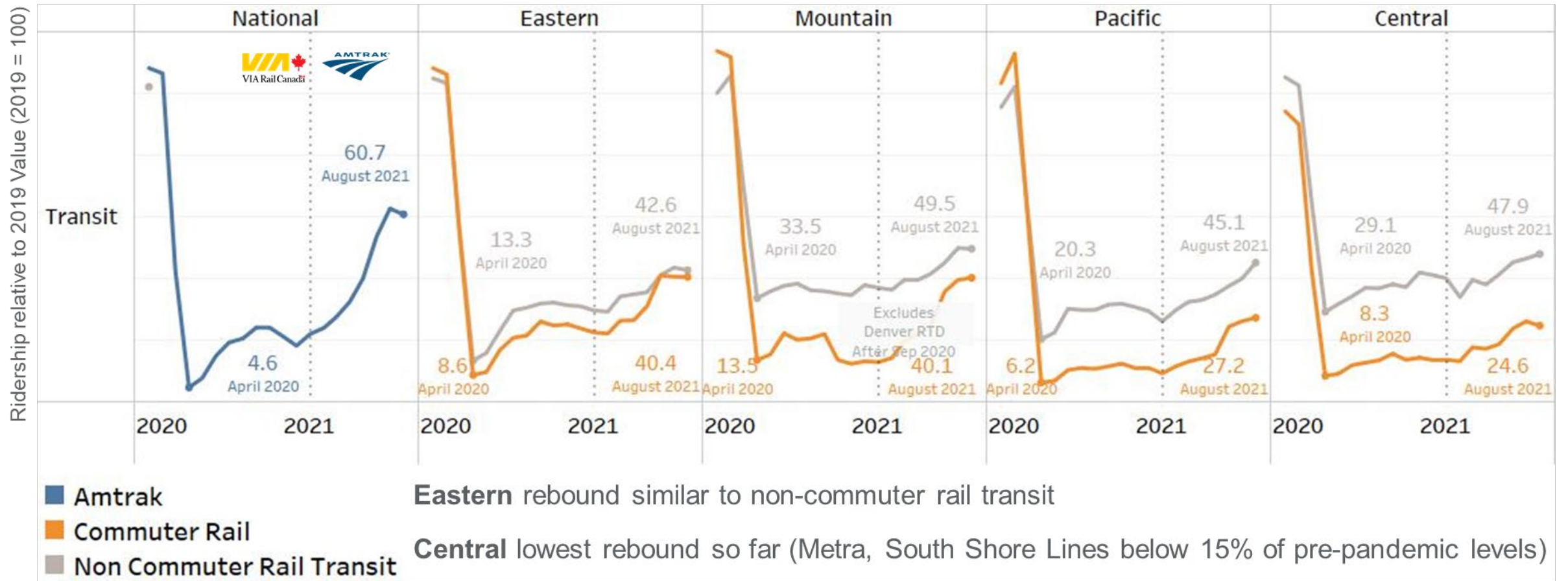


Språk ▾

Home > Welcome back



Trends in American Commuter Rail and Amtrak Ridership by Region



Eastern rebound similar to non-commuter rail transit

Central lowest rebound so far (Metra, South Shore Lines below 15% of pre-pandemic levels)

Mountain fastest rebound (UTA at 45%, Denver RTD excluded after 9/20 due to N Line Impact)

Amtrak at 60 percent of pre-pandemic ridership, reflects leisure trips?

Source: NTD, Amtrak

Conclusions

Infrastructure Investment and Jobs Act provides some positive news to lessen the current ridership downturn
Internationally, pandemic has put into question traditional Monday-Friday AM/PM commute some railroads rely on

Can railroads use the tools available to them (service, fares, “soft amenities”) to attract additional/new types of trips to replace those lost to work from home?

- ▶ What has been impact in your area?
 - Ridership, service, fares, etc
- ▶ What steps can be taken to help draw back ridership?
- ▶ What promotional fares are being considered to improve ridership?
- ▶ What has worked in the past to help increase ridership?

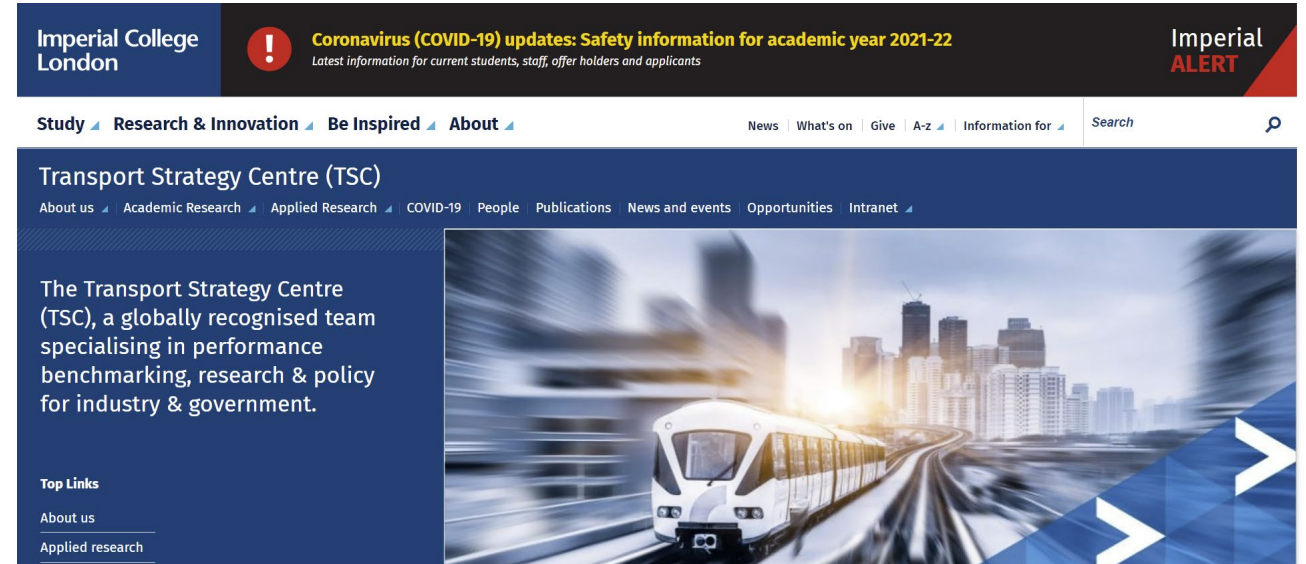
Thank You



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<https://www.imperial.ac.uk/transport-studies/transport-strategy-centre/>