

The Ideology of “Commuter” Rail

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BEYOND COMMUTER RAIL PANEL

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So I think Christof gave a terrific intro, and I want to dive a little deeper into how things got to be that way, in ways that hopefully help explain why things got to be the way they are. I'm afraid this is going to be a little more wordy, but I hope entertaining and interesting.

About Me

- Deputy Director of Regional Transit Planning, MBTA (but appearing in a personal capacity!)
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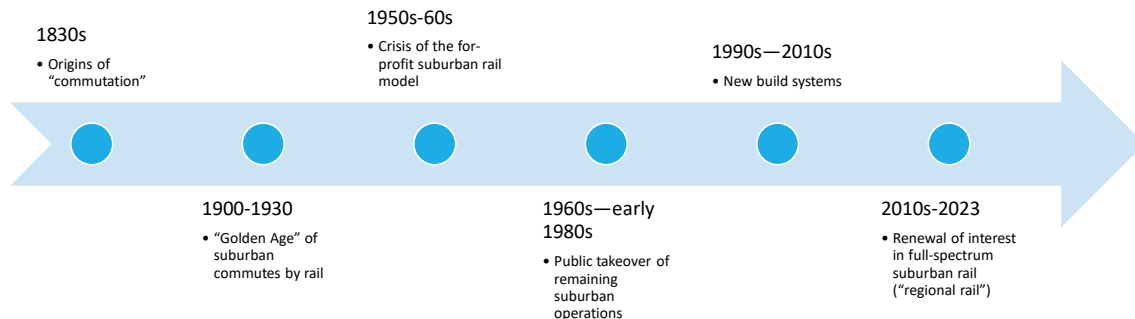
What would you expect from this train?



Photo by Zol87, licensed under the [Creative Commons Attribution-Share Alike 2.0 Generic](https://creativecommons.org/licenses/by-sa/2.0/) license.
https://commons.wikimedia.org/wiki/File:93rd_StreetSouth_Chicago_Metra_Station.jpg

1. How often would you guess a train with these characteristics (electrified, high platforms for level boarding, running in the middle of a mixed-use street in a dense urban area) comes? Put your guesses in the chat. If you're familiar with this operation, don't ruin it for others.
2. Would you guess every 20ish minutes at most in the peak direction and every hour off peak on weekdays? And hourly all day on weekends? But it hasn't always been that way. And that's because of the Ideology of North American Commuter Rail.
3. So I'm going to talk about that ideology, and where it comes from, and hopefully by implication shed some light on some Caltrain issues.

Commuter Rail History



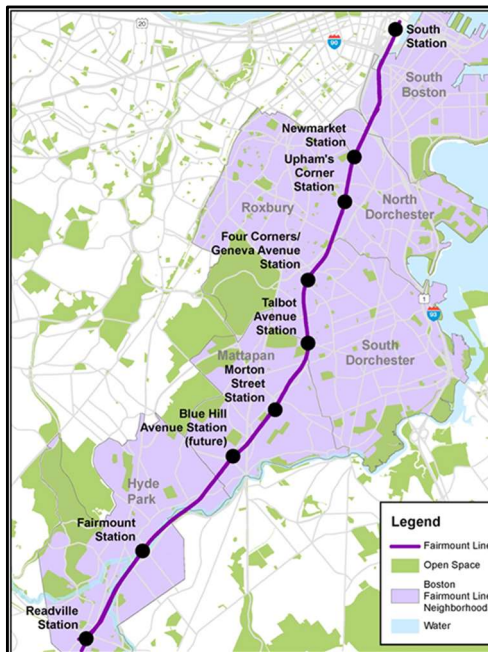
1. Brief history—I'm going to cover quickly, but it's not really the main thrust of what I want to talk about
 - a. Origins of Commutation—variously attributed to LIRR, Boston & Worcester, etc around 1834, just a few years after first RRs in this country
 - b. Golden Age (Hilton article)
 - c. Postwar decline and reluctance to bail out (losses strongest off-peak)
 - d. Transition to public ownership ([table from TCRP report](#))
 - e. New build systems

Class Distinctions: a Foundational Principle

“Chicago's mass transit system had long provided ample opportunity for skittish riders to choose the character of their fellow travelers. As early as the 1880s one South Side woman, complaining of the lack of "heating" straw on the floors of streetcars, observed to the Tribune **that "the rich have their [Illinois Central commuter] trains to ride."** And early streetcar routings took class into account, as Northwest Side community leader Tomaz Deuther discovered when he asked Chicago Railways president John Roach to send cars directly down State Street from Deuther's working class neighborhood. "You can't mix silk stockings with picks and shovels," Roach replied.”

Paul Barrett, “Public Policy and Private Choice: Mass Transit and the Automobile in Chicago between the Wars.” *The Business History Review*, Vol. 49, No. 4 (Winter, 1975), pp. 473-497 <http://www.jstor.org/stable/3113171>

Emphasis mine. I think this quote is so, so, so important to understanding the development of the North American Commuter Rail model—so important, in fact, that I paraphrased the highlighted bit to title my master’s thesis. It really shows how the awareness of intentionally drawn class distinctions between different modes of transit has shaped both management and rider expectations for well over a century at this point.



The Fairmount Line

Graphic source:
https://www.ctps.org/data/html/studies/bikeped/Fairmount_Line_Station_Access_report/Fairmount_Line_Station_Access_report.html

CTPS **FIGURE 1-1** MBTA Fairmount Line Stations in City of Boston Neighborhoods *Fairmount Station Access*

Commuter Rail: In, But Not Of, The City

“nearly all interviewees held the belief that a commuter rail service operating solely within Boston seemed unnatural...many interviewees claimed that Fairmount Corridor residents believed that the commuter rail was a service to be devoted exclusively to suburbanites...residents think commuter rail – and, by extension, the Fairmount Line – is not for them; that as it currently stands, Fairmount Line service is inadequate; and this is assuming that people even know about the Fairmount Line, which does not even seem to be the case.”

Andrew Lai, *Community Involvement in Commuter Rail Improvements: The Case of the Fairmount Line in Boston*. MIT Master's Thesis, 2015. All quotes from Ch. 7.

Trains are for (Mad) Men in Grey Suits

“The literal adoption of grey suits by male leads is the key visual motif shared by commuter narratives. This gesture is underscored by the experience and iconography of travelling by train to a work-focused urban core. A clear juxtaposition of suburban domesticity and city--based employment sees company men leaving home for work while their wives suffer a dull and tedious existence in their absence.”



Melissa Gregg, “The Return of Organisation Man: Commuter Narratives and Suburban Critique.” *Cultural Studies Review*: Vol. 18, No. 2 (September 2012)

https://blog.amtrak.com/wp-content/uploads/2014/05/Mad-Men-via-idesignyoureyes.com_.jpg

Where else to turn to express who “commuter” rail has been for than to a famous show that I must admit I have never actually watched a single episode of? Australian academic Melissa Gregg analyzes commuter narratives in written and especially visual art focusing on mid-20th century Anglosphere commuting, noting the association of the commute with maleness and relative economic privilege.

Quantifying the Inequities (1)

“Public transit agencies have perpetuated historic discriminatory patterns of service and fare structure inherited from private transit operators and have, in addition, introduced new and perhaps more serious forms of inequity...Such inequities include (1) more intensive subsidization of transit modes and routes patronized by relatively affluent riders; (2) implicit cross-subsidies within each mode and each route from relatively low-income short-distance, off-peak riders to relatively affluent long-distance, peak hour riders; and (3) regressive tax financing of state and local transit subsidies...In Chicago, for example, the per passenger operating subsidy to commuter rail in 1980 was about 2.5 times as large as the subsidy to bus passengers and was only slightly more than the subsidy to rail rapid transit users.”

John Pucher (1982) “Discrimination in Mass Transit,” *Journal of the American Planning Association*, 48:3, 315-326, <http://dx.doi.org/10.1080/01944368208976181>

- OK, so these are nice stories, but show me the data, Sandy, right? Let’s turn to a landmark paper in the field of transit equity. I’ve pulled out a quote that’s illustrative of the argument Pucher makes in this paper, but I want to note that there’s an important element this quote doesn’t capture—he very clearly charges transit agencies with repeatedly violating Title VI of the Civil Rights Act, the guiding legal force behind transit non-discrimination law.
- If the idea that the transition of transit from private to public management not only reinforced existing inequities but in many cases even *accelerated* them strikes you as remarkable...I think it’s actually intrinsic to understanding the concept of “commuter” rail as it has stood until today, and I’ve got a case study to share to demonstrate how it works.

Quantifying the Inequities (2)

Table 1. Transit operating subsidies per passenger trip, U.S. aggregate (amounts in dollars)

Transit mode	Year		
	1973	1976	1978
Bus and streetcar	.07	.26	.37
Rail rapid transit	.17	.35	.41
Commuter rail	.68	1.24	1.53

Source: Pucher (1981a, Table 2). Based on data collected by the author from individual transit agencies in the twenty-six largest U.S. metropolitan areas; and on the Transit Fact Book (American Public Transit Association 1979, Tables 4, 5, 9, and 20).

Table 2. Percentage composition of transit riders by household income, 1977-78 (U.S. metropolitan areas, all trip purposes)

Transit mode	Income class					
	Less than \$6,000	\$6,000-\$9,999	\$10,000-\$14,999	\$15,000-\$19,999	\$20,000-\$24,999	\$25,000 and over
Bus and streetcar	28.3	19.2	18.7	13.5	8.5	11.7
Rail rapid transit	16.2	17.2	27.7	14.4	11.7	12.9
Commuter rail	9.3	6.0	7.9	18.9	20.1	37.8
Total transit	24.9	17.8	19.1	14.1	10.0	14.2

Note: Each row adds to approximately 100 percent.
Source: Pucher, Hendrickson, and McNeil (1981, Table 1). Calculated from the four computer tapes of the 1977-1978 Nationwide Personal Transportation Study, Federal Highway Administration, U.S. Department of Transportation.

Table 3. Transit operating subsidies per passenger trip, 1980 (amounts in dollars)

Transit mode	Urban area	
	Chicago	Northern New Jersey
Bus	.36	.24
Rail rapid transit	.71	.64
Commuter rail	.85	2.06

Source: Calculated by the author on the basis of data reported in New Jersey Transit Corporation (1981b); Port Authority of New York and New Jersey (1980); Chicago Transit Authority (1981c) and Regional Transportation Authority (1981).

Table 4. Percentage composition of transit riders by household income, 1980 (all trip purposes)

Urban area and transit mode	Income class					
	Less than \$6,000	\$6,000-\$9,999	\$10,000-\$14,999	\$15,000-\$19,999	\$20,000-\$24,999	\$25,000 and over
Chicago						
Bus	12.3	9.6	15.9	14.7	13.4	34.2
Rail rapid transit	9.6	8.1	15.2	14.6	13.9	38.7
Commuter rail	1.2	1.8	5.3	7.6	10.3	73.8
Northern New Jersey						
Bus	9.1	5.2	9.0	10.5	10.6	55.4
Rail rapid transit	6.1	4.1	9.2	14.1	13.8	52.7
Commuter rail	3.5	2.3	4.9	9.8	11.5	68.0

Note: Rows add to approximately 100 percent.
Source: Port Authority of New York and New Jersey (1981c), cross-tabulations for Fairman-Clibson-Peck of the 1975-76 Annual Housing Survey computer tapes (U.S. Department of Housing and Urban Development 1978); Regional Transportation Authority (1977); and income growth factors from Current Population Reports (U.S. Department of Commerce, Bureau of the Census, 1977 through 1981). The original 1976 Chicago statistics and 1974 (rail mode) and 1975 (bus) New Jersey statistics were adjusted to account for income growth by 1980.

John Pucher (1982) "Discrimination in Mass Transit," *Journal of the American Planning Association*, 48:3, 315-326, <https://doi.org/10.1080/0190/00000000000000000000>

- Here's some of the actual data from the paper. I want to specially point to the date on this landmark paper—1982. We have been aware of these dynamics for a long time.
- And lest you think things have changed all that much, similar analyses have been repeated many times over the years, including by Prof. Pucher (who I believe recently retired) and his students.

Transitions to Public Ownership

TCRP Report 200, Contracting Commuter Rail Services, Volume 1: Guidebook (2018)

<https://www.nationalacademies.org/doc/25249>

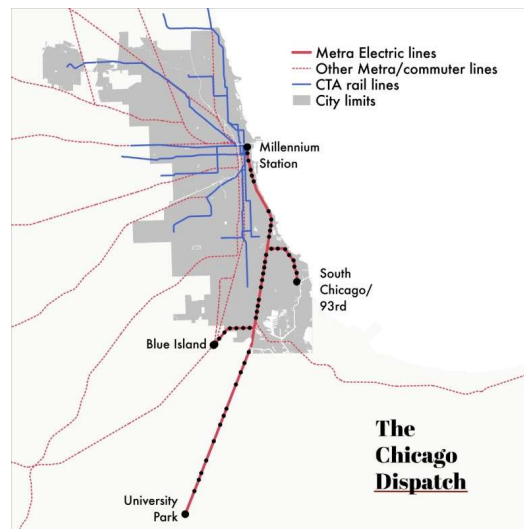
Table 3. Legacy commuter rail systems in the United States and Canada.

Public Service	Legacy Systems	Service Area
1962	Port Authority Trans-Hudson Corporation (PATH), Port Authority of New York and New Jersey (Port Authority of NY & NJ)	New York City and New Jersey
1964	Massachusetts Bay Transportation Authority (MBTA) Commuter Rail	Boston, MA
1966	Long Island Rail Road (LIRR), New York Metropolitan Transportation Authority New York (MTA)	New York City–Long Island, NY
1967	GO Transit, Greater Toronto Transportation Authority (Metrolinx)	Toronto–Hamilton, Ontario, Canada
1982	Réseau de Transport Métropolitain (RTM)	Montreal, Quebec, Canada
1983	Metro-North Commuter Railroad Company (Metro-North), New York MTA	New York City–North and East NY
1983	New Jersey Transit Rail Operations (NJ TRANSIT)	New Jersey–New York City
1983	Southeastern Pennsylvania Transportation Authority, Regional Rail Division (SEPTA)	Philadelphia, PA
1983	MARC Train Service (MARC), Maryland Transit Administration (MTA)	Martinsburg, WV–Frederick, MD–Perryville, MD–Baltimore, MD–Washington, D.C.
1983	Metropolitan Rail Corporation (Metra), Regional Transportation Authority	Chicago, IL
1989	South Shore Line, Northern Indiana Commuter Transportation District (NICTD)	South Bend, IN–Chicago, IL
1992	Caltrain, Peninsula Corridor Joint Powers Board (PCJPB)	San Francisco–San Jose–Gilroy, CA

- I want to call your attention briefly back to the slide I showed before, which mentioned that between the 1960s and mid-1980s the remaining suburban commuter rail operations were all, in one format or another, taken over by the public sector.
 - Want to acknowledge some messiness in the chart (for example, includes PATH, which is for some odd reason still FRA-regulated but functions much more like a subway than a mainline rail)
- I think we can safely say that a large part of the motivation for this takeover was vocal activism from the powerful, politically connected populace that most typically used these services.

Metra Electric in Context

<https://southsideweekly.com/the-south-sides-strange-train/>



So, let's illustrate all this high level talk with a case study.

- Very similar to Fairmount in terms of urban context
- Like other operations, was privately run; but differed from others in that it had rapid-transit-quality infrastructure (4-track ROW, high platforms, electrification) from very early on; indeed it's included on early maps of rapid transit in Chicago.
- Was one of the last private operations to post an operating profit, in the mid-'60s
- And it's a fascinating case study because it was, effectively, a rapid-transit-quality service that was converted to a "standard commuter rail" paradigm—perhaps the only one in the country we can say that of

From Rapid Transit to Commuter Rail: Illinois Central/Metra Electric

CTA Dan Ryan Line opens (1969)

RTA budget crisis (1981)

Graphic from: Allen, John G. 1998. "From Commuter Rail to Regional Rail: Operating Practices for the 21st Century." *Transportation Research Record* (1623): 127-134.

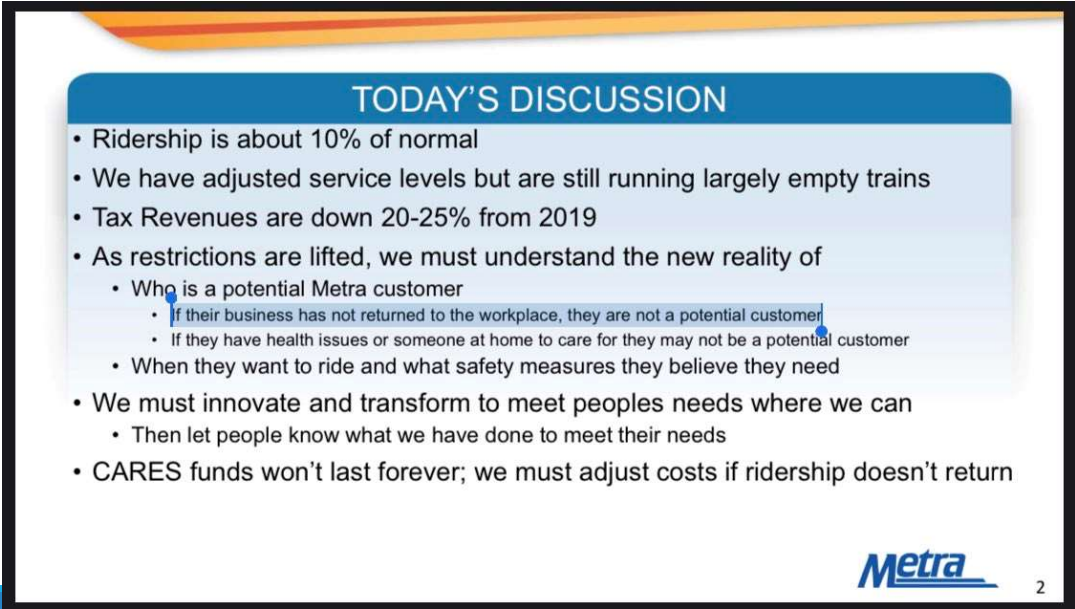
TABLE 1 Illinois Central/Metra Electric Service Patterns for Selected Years

Year	Main line to south suburbs	South Chicago	Blue Island
1946	Every 40 minutes, all day, every day, plus additional rush hour service	Every 10 minutes (20 minutes evenings and Sundays), plus additional rush hour service; also rush hour locals serving since-abandoned stops between 27th and 47th Streets	Every 40 minutes, all day, every day, plus additional rush hour service
1965	Every 40 minutes (60 minutes evenings and Sundays), plus additional rush hour service	Every 20 minutes (60 minutes evenings and Sundays), plus additional rush hour service	Every 40 minutes (60 minutes evenings and Sundays), plus additional rush hour service
1974	Every 30 minutes (60 minutes evenings and Sundays), plus additional rush hour service	Every 30 minutes (60 minutes evenings and Sundays), plus additional rush hour service	Every 30 minutes (60 minutes evenings and Sundays), plus additional rush hour service
1979	Every 30 minutes (60 minutes evenings and Sundays), plus additional rush hour service	Every 30 minutes (60 minutes evenings and Sundays), plus additional rush hour service	Every 60 minutes all day, every day, plus additional rush hour service
1982 to date	Every 60 minutes Monday through Saturday (every 2 hours on Sundays), plus additional rush hour service	Every 60 minutes Monday through Saturday (every 2 hours on Sundays), plus additional rush hour service	Every 2 hours Monday through Saturday (but every 60 minutes during evenings), plus additional rush hour service (no service on Sundays)

Source: Published Illinois Central Electric and Metra Electric timetables.

The transition of Chicago-area suburban rail operations was gradual, and in some cases the private railroads actually remain today as contract operators. But—accurate to the hypothesis of the Pucher article I talked about a moment ago—the decline of Illinois Central/Metra Electric service was triggered in particular by a couple of *public sector* actions. First of all, of course, we have to mention freeway-building and the sprawl that took away significant ridership. But in 1969, the CTA opened a rapid transit line in the median of the Dan Ryan freeway that directly competed with IC suburban service—including rerouting South Side buses to feed that line instead of the IC. In 1981, the Regional Transit Authority—the entity established to coordinate funding across the region—experienced a massive budget crisis that hit transit hard everywhere, but nowhere more so than on the Metra Electric that served the poor, Black South Side and southern suburbs. As John Allen helpfully charted, what had been rapid-transit-quality service in the 1940s, and something approximating it for 30+ years after that, turned overnight into something identical to “typical” North American Commuter Rail, infrastructural and built environment differences be damned. That was the paradigm the planners of the era assigned to “mainline” rail, and because the Electric was mainline rail, that was how it was going to look, no matter how poor the fit between operational paradigm and area served. And the schedules would remain essentially identical—down to the minute, in many cases—for basically another *thirty-five years*, until its credit Metra started experimenting with them within the last decade.

Ideology



The slide is titled "TODAY'S DISCUSSION" and contains the following bullet points:

- Ridership is about 10% of normal
- We have adjusted service levels but are still running largely empty trains
- Tax Revenues are down 20-25% from 2019
- As restrictions are lifted, we must understand the new reality of
 - Who is a potential Metra customer
 - If their business has not returned to the workplace, they are not a potential customer
 - If they have health issues or someone at home to care for they may not be a potential customer
 - When they want to ride and what safety measures they believe they need
- We must innovate and transform to meet peoples needs where we can
 - Then let people know what we have done to meet their needs
- CARES funds won't last forever; we must adjust costs if ridership doesn't return

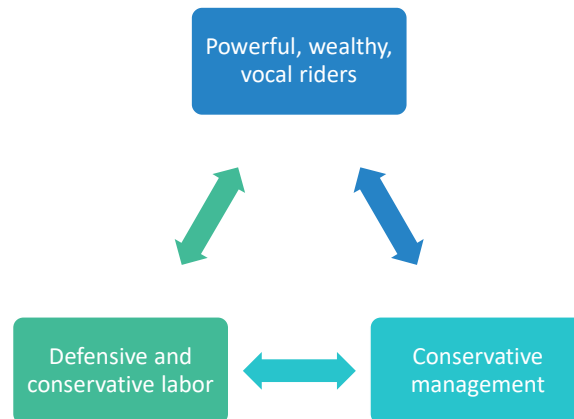
The Metra logo is in the bottom right corner of the slide, and the number "2" is in the bottom right corner of the slide area.

Why? If the commuter rail operating paradigm is such a poor fit for the Electric District, why did it take hold? Austerity, of course, is part of the answer, as is destructive competition rather than collaboration between different public sector operators. But ideology is perhaps the biggest component. Here we have an “official” Metra explanation for how the agency has traditionally understood its mission.

Read out line on business

This was 2020! COVID and all, but we knew then and know now from elsewhere in the country that it was in fact our frontline “essential” workers—service workers, construction workers, etc—and not office workers who never stopped riding transit and who have been the backbone of its ridership recovery. To their immense credit much of Metra’s management and leadership have started to recognize the flaws in this kind of thinking over the last couple of years, noticing that their ridership is lagging peer systems, but it is just SO illustrative of how so many commuter rail operators have conceived of their ridership base—even in the face of incredibly evidence to the contrary.

Why “Commuter” Rail? The Iron Triangle



- a. I started my master’s thesis with a very simple question: if the vast majority of other developed countries have adopted some form of modernized, full-spectrum suburban or regional rail, why has it not caught on in the US, at least until very recently?
- b. As I worked on the research, the evidence suggested a framework of the Iron Triangle—adapting a term used in slightly different ways in political science and project management lit
- c. As eventual public takeover despite dogma demonstrates, the classical commute demographic is extremely powerful, and the hold the service paradigm has on management and labor is engrained from the very beginning. Riders are loud, rich, and averse to change. Management feels harassed and beholden to powerful riders—a dynamic strikingly absent in other forms of transit. Labor feels attacked by all comers and frequently retreats to resisting change and modernization. Technical questions exist, but the real ones are social and political.
- d. So you wonder why it took so long for Caltrain reform to come around? And why even now with all the spending done, and infrastructure in place, or nearly so, there might still be some resistance? I can’t claim the local on the ground expertise that you all can. But I hope I’ve offered a bit of a framework for how and where these dynamics are rooted and how hard they are to change.

Is the Tide Turning?

IMPLEMENTATION

- Denver
- Toronto
- Caltrain

PLANNING/EXPLORATION

- SEPTA
- MBTA
- MARC/VRE
- Metra
- UTA

Want to finish with a little hope....maybe things are changing?

<https://www.wbez.org/stories/metra-proposes-changes-to-fares-10-ride-pass-as-commuters-wane/7df490d7-0f9f-43f6-97c4-5e269867de59>