



**ILLINOIS  
HIGH-SPEED  
RAIL**

COMMISSION

**IDOT Headquarters:  
Springfield & Chicago  
Monday, May 11, 2026**



# TODAY'S AGENDA



**10:30am:**



Welcome & Introduction (Chair Derwinski)  
Roll Call (Morreale Communications)

**10:35am:**



Minutes Approval from prior Commission Meeting (Chair Derwinski)

**10:40am:**



Technical Assistance & Support Update (Quandel Consultants)

**11:25am:**



Discussion of House Bill 4442: High-Speed Rail Commission Repeal (Commissioner Harnish)

**11:40am:**



Public Comment

**11:50am:**



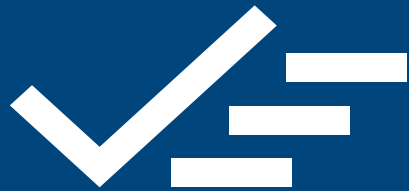
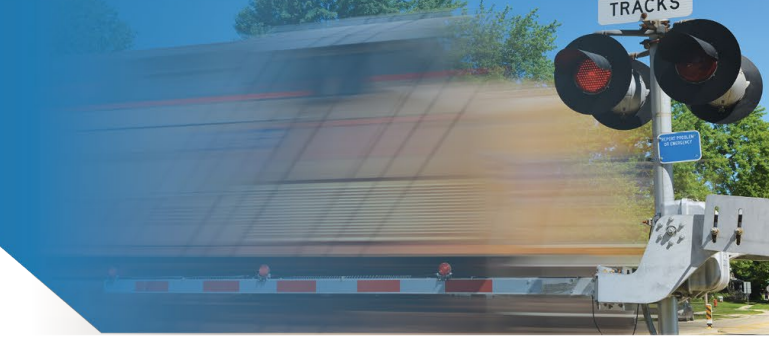
Commission Meeting Adjourns

# MEETING MINUTES



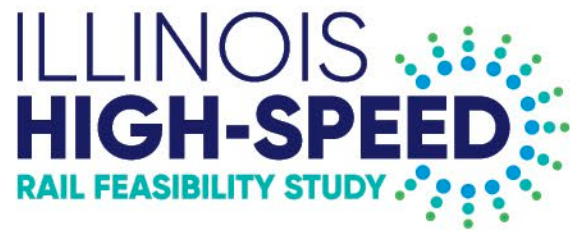
- Meeting minutes from prior Commission meetings were circulated prior to today's meeting.
- Are there any requested changes?

# TECHNICAL ASSISTANCE UPDATE



## Technical Assistance and Support Update

*Presented by the Quandel Consulting Team*



*Strengthening our State. Connecting the Region.*

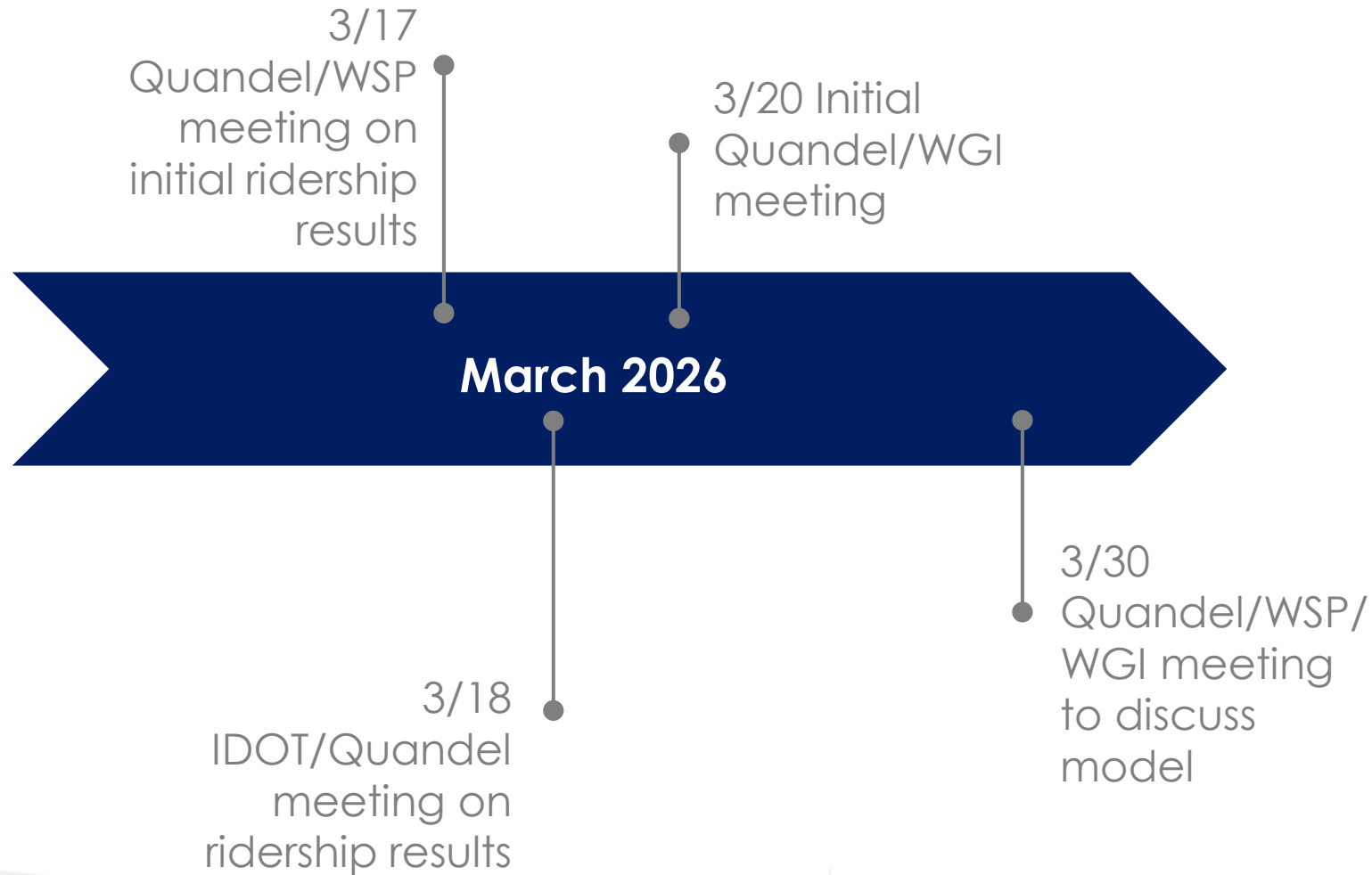
# IL HSR Commission Meeting

May 11, 2026

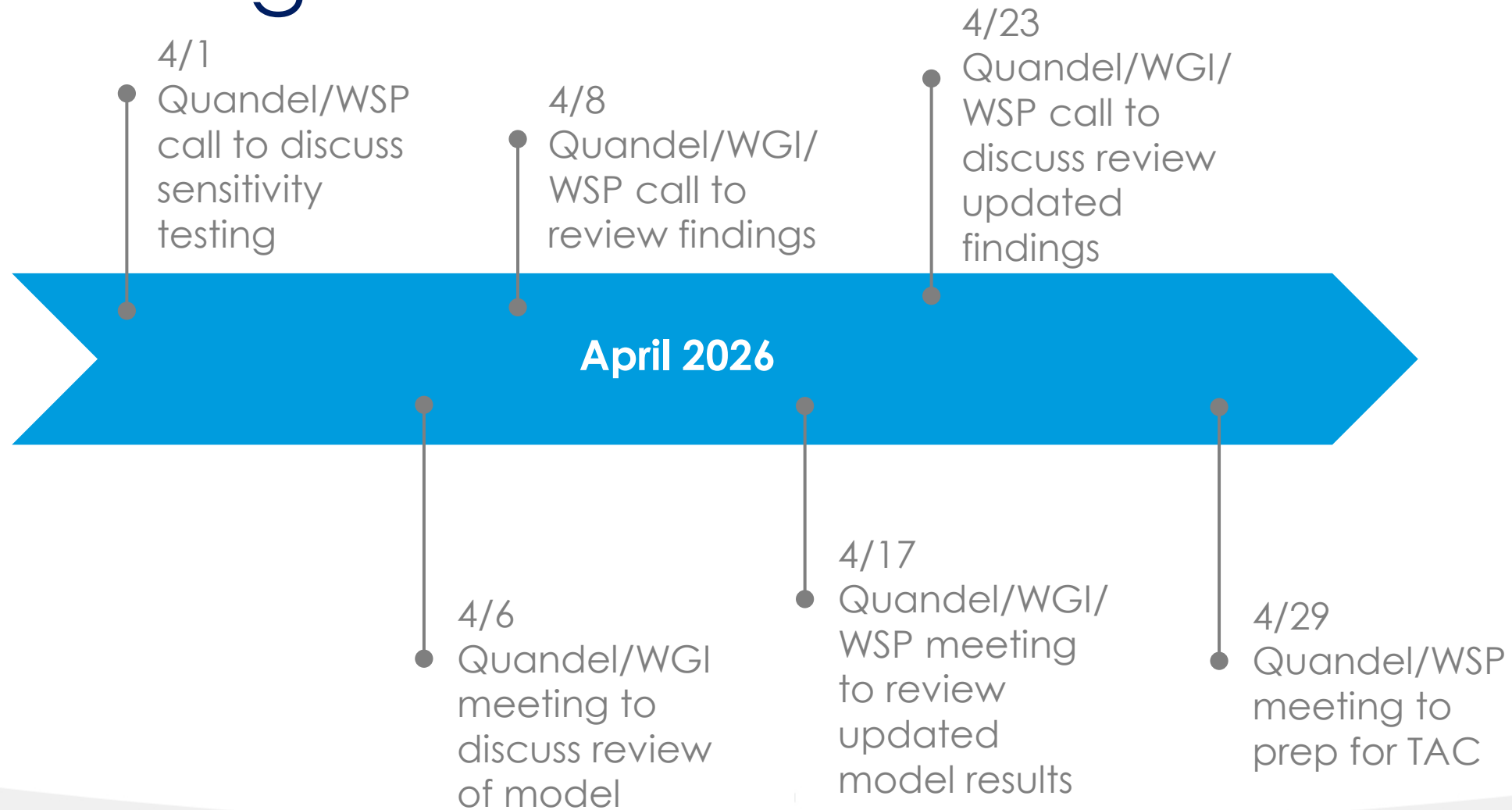
# Purpose of Meeting

- This meeting will:
  - Present ridership and revenue forecasts
  - Explain the modeling approach, assumptions, and key inputs
  - Summarize coordination with WSP and the independent peer review
  - Describe refinements made to the model and ongoing sensitivity testing
  - Provide transparency into the process and decisions to date
  - Solicit TAC input

# Meetings



# Meetings



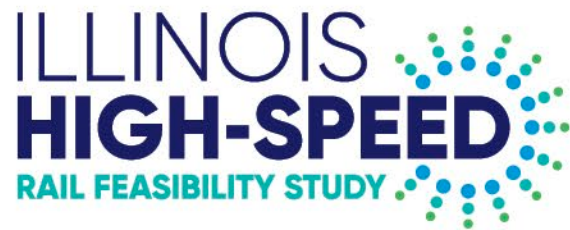
# Peer Review

- Why peer review?
  - Initial ridership was low
  - Defensibility of model
- Scope
  - Sensitivity testing for headways – 16 RT (60-minute), 8 RT (120-minute), 32 RT (30-minute)
  - Benchmarking to comparable services
  - Review of parameters and methodology

# Findings of Peer Review

- Opportunities to improve the sensitivity of the model
- Review other studies to see how coefficients estimated compared
- Based on review, adjusted coefficients and recalibrated the model
- Comparison of model results to actual systems
- Peer reviewers are comfortable with a range of ridership
- Updated ridership did not show a material difference for 16 RT

# Report from Project Delivery TAC



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# High Speed Rail Ridership & Revenue

## Methodology & Results

# Ridership & Revenue Agenda

1

- Establishing Existing Demand Between City Pairs (10 min)
  - Routes/Input Data/Modes

2

- Estimation of High-Speed Rail Market Share(15 min)
  - Stated Preference Survey Approach and Results

3

- Forecast for HSR Demand
  - ILHSR Model Development (15min)
  - Forecasts(30 min)
- Discussion

# Methodology to Forecast High Speed Rail Ridership

1

Establish total  
demand between  
city pairs

-----  
Existing trips in the  
corridor  
Potential for mode shift

2

Estimate high speed  
rail's market share

-----  
Preferences of current  
travelers (ILHSR survey)

3

Estimate high speed  
rail demand

-----  
Customized mode  
choice model for ILHSR  
-> Annual revenue and  
ridership by station pair

# Establish Total Demand between City Pairs

Current Trip Volumes

# 1 Stations and Routes

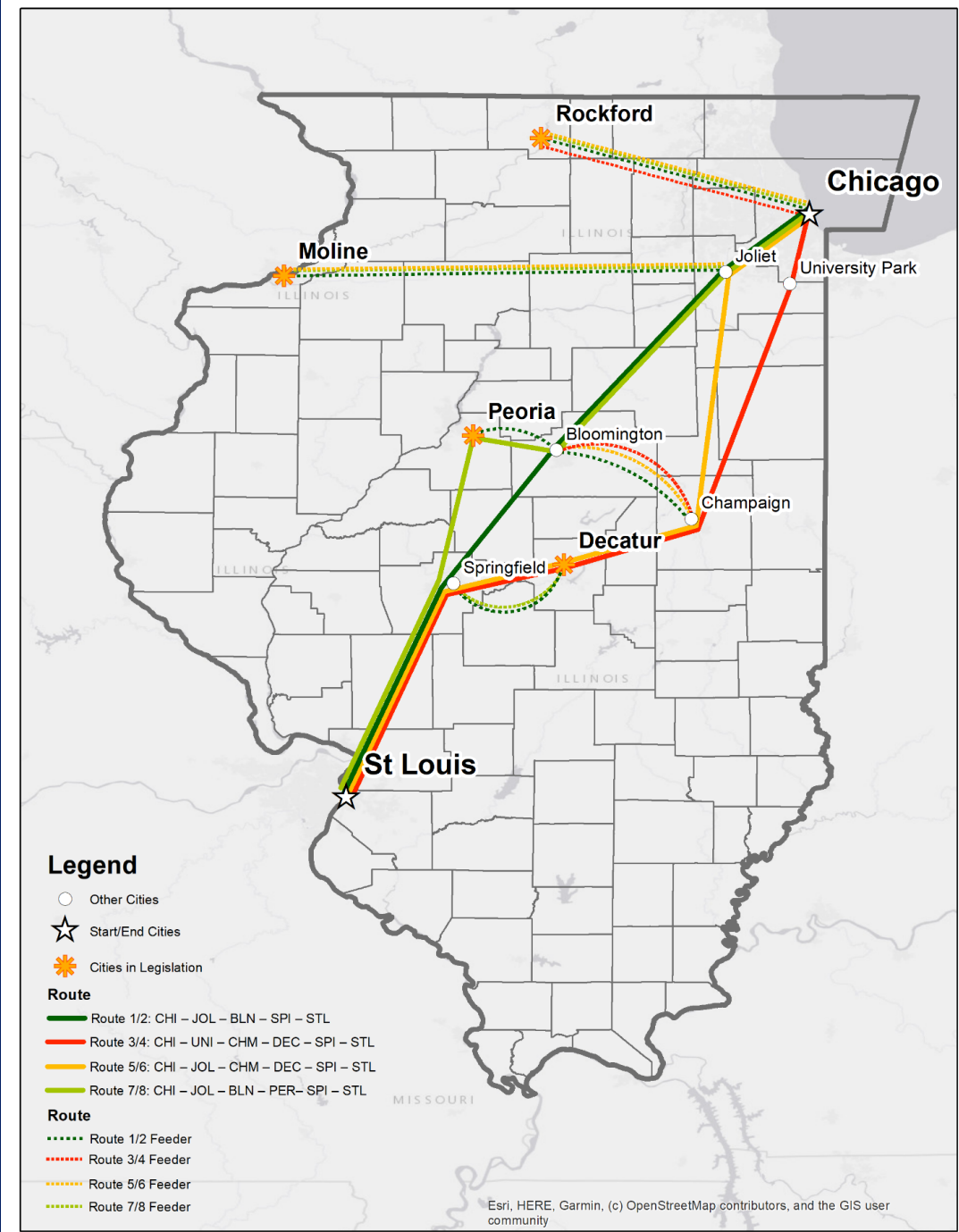
16 route/station combinations

## Cities with HSR Stations

- Chicago/Joliet/University Park
- Bloomington
- Peoria
- Champaign
- Decatur
- Springfield
- St. Louis

## Alternative Station Locations

- Downtown Bloomington
- Downtown Champaign
- Downtown Springfield



# 1

# Stations and Routes

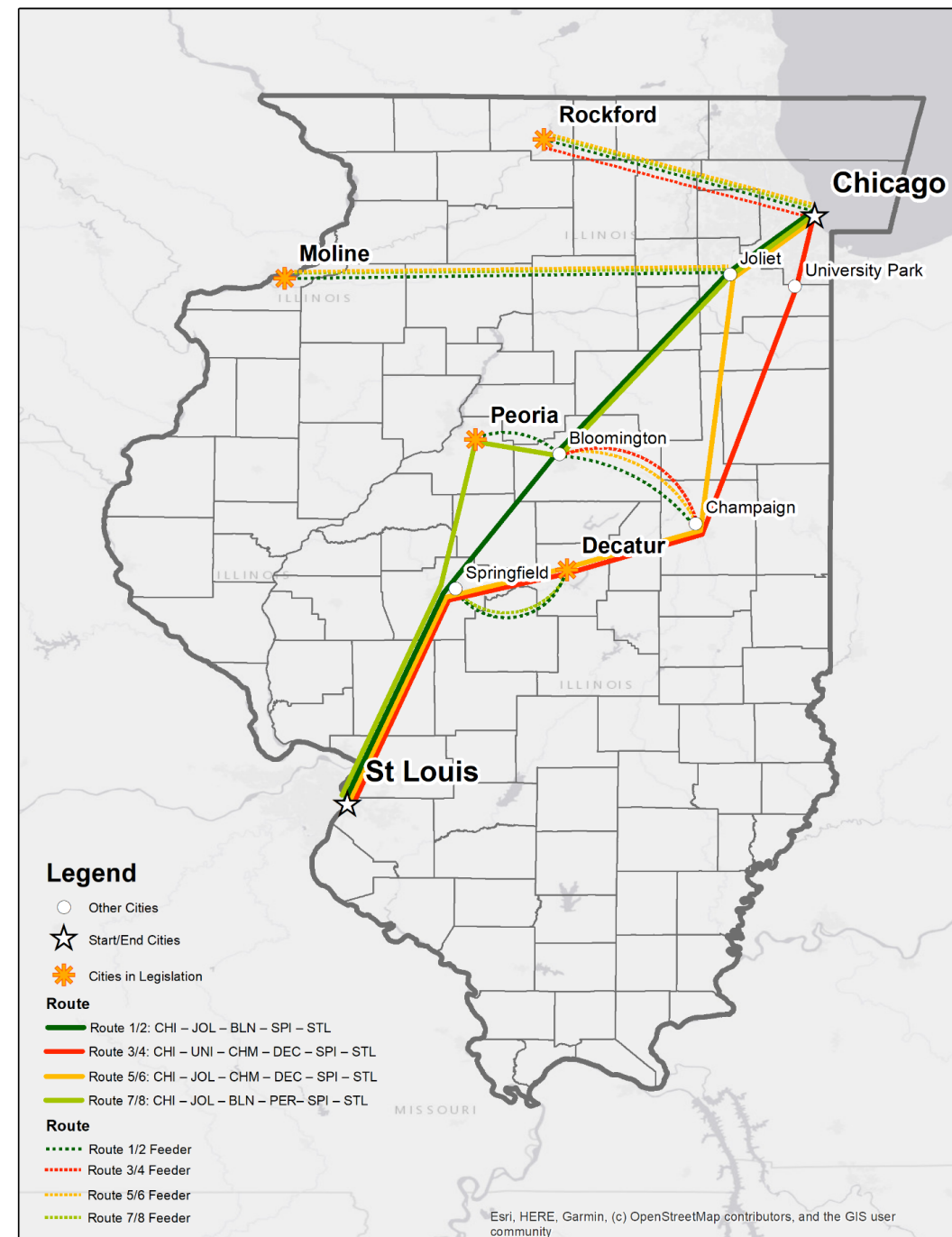
16 route/station combinations

## Routes

- All routes include Chicago, Springfield and St. Louis
- Routes 1 and 2: Most direct routes (Joliet, Bloomington)
- Routes 3 and 4: Via University Park, Champaign and Decatur
- Routes 5 and 6: Via Joliet, Champaign and Decatur
- Routes 7 and 8: Via Joliet, Bloomington and Peoria

## Feeder Network

- Rockford (connect to Chicago)
- Moline (connect to Joliet)
- Peoria and Champaign (connect to Bloomington)
- Decatur (connect to Springfield)



# 1

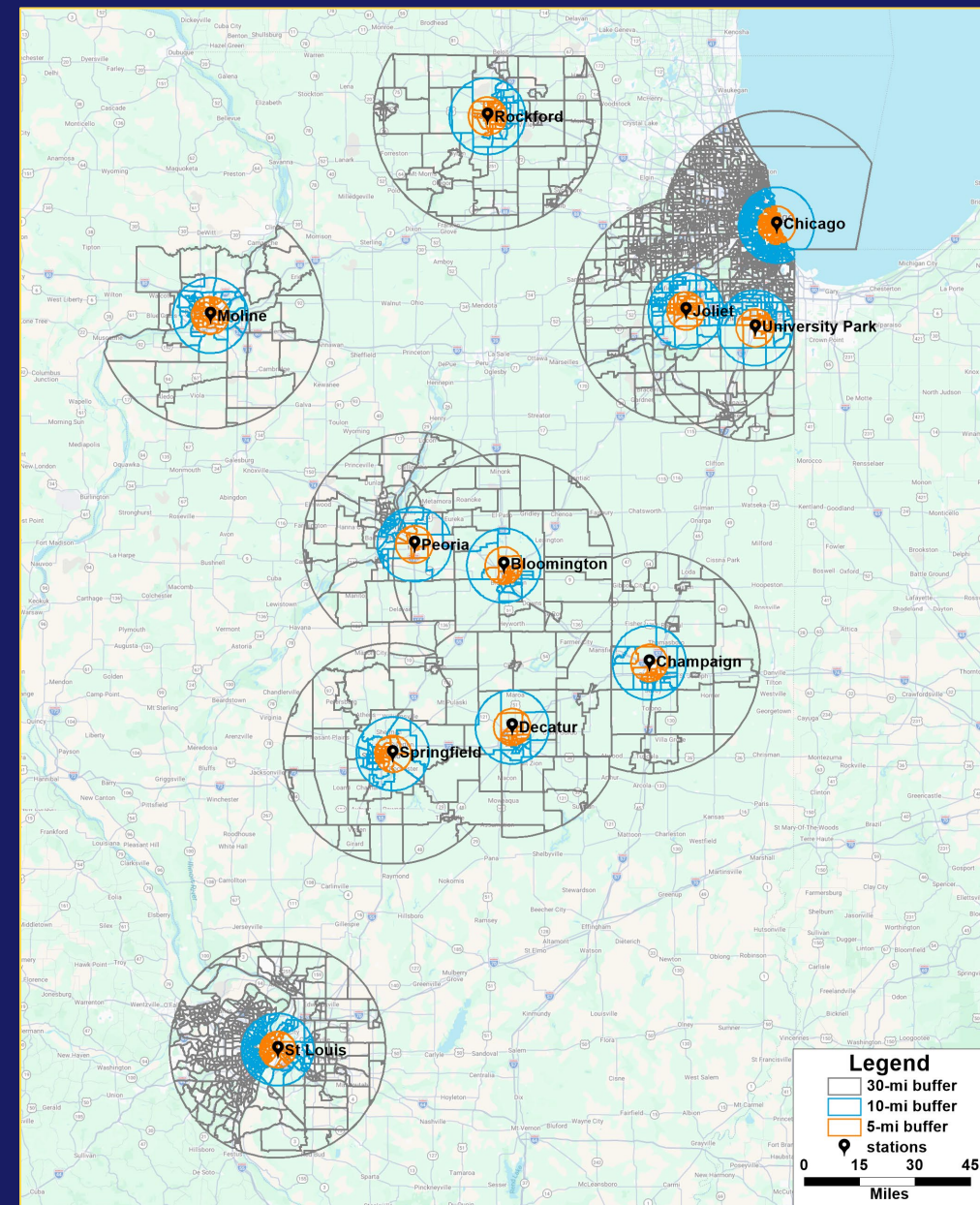
# Station Catchment Areas

## Catchment Areas

- Areas from which high-speed rail service is a reasonable travel option.
- Represented as buffers around each proposed station.

## Buffer Assumptions

- Pairs of 50 miles or less: 5-mile buffer
- Between 51 and 100 miles: 10-mile buffer
- More than 100 miles: 30-mile buffer

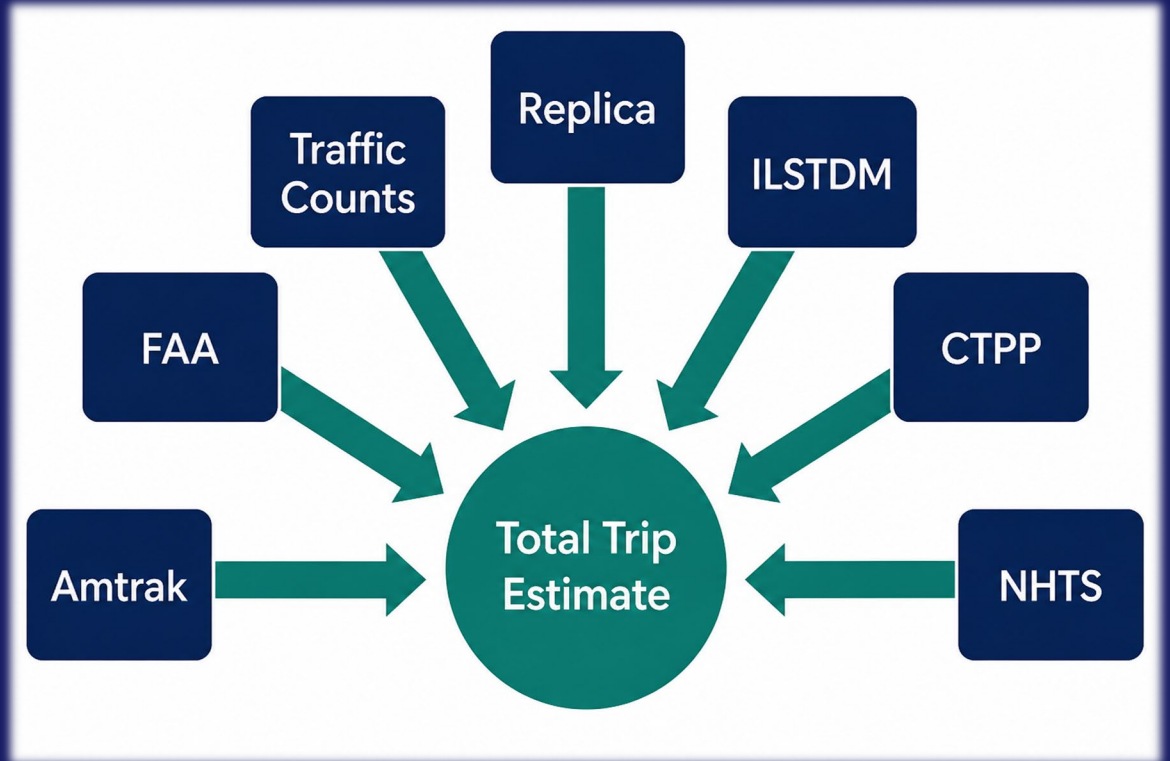


## 1

# Base Year Travel Demand

- Develop a reasonable current estimate of the trip volumes between the catchment areas
- Using best available data from multiple sources.
- Census tract level estimate of total demand (~20K pairs)

*Demand uncertainty remains high and materially affects ridership potential.*

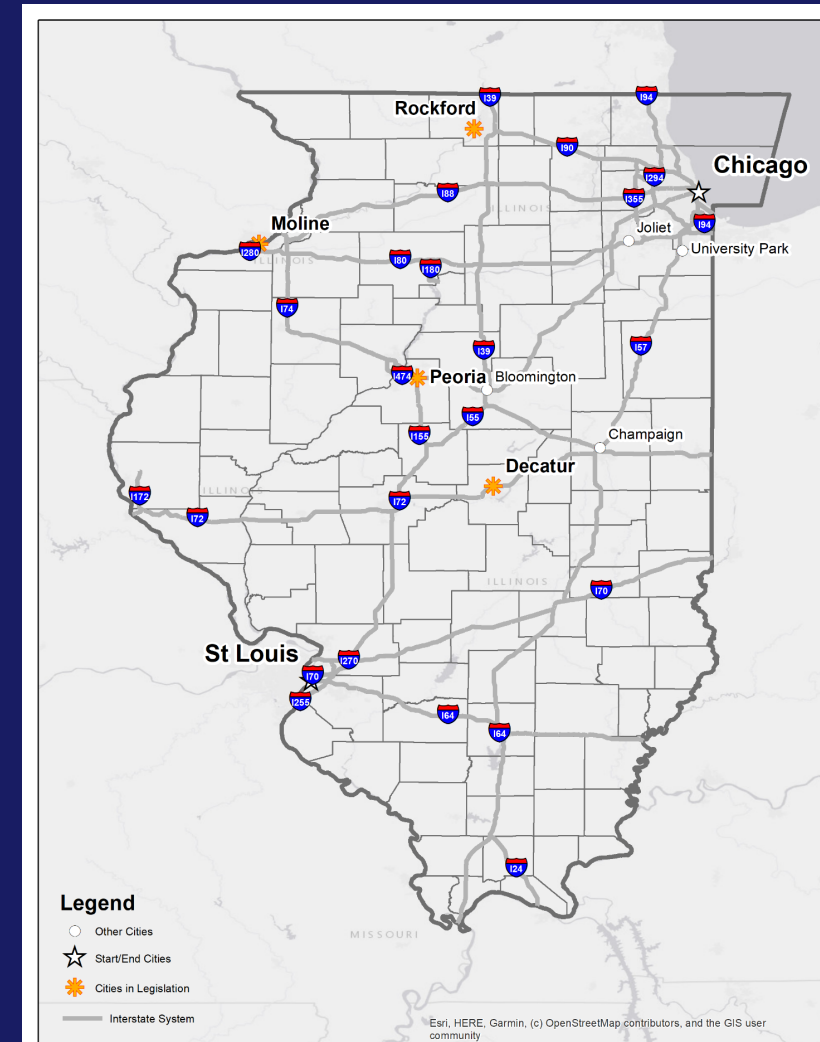


# 1 Base Year Travel Demand

## Vehicle Trips

### AADT 2023 (IDOT)

| Interstate | Segment                 | AADT                    |
|------------|-------------------------|-------------------------|
| I-55       | Joliet - St. Louis      | 11,300 (each direction) |
| I-57       | Joliet - Champaign      | 8,500 (each direction)  |
| I-72       | Champaign - Springfield | 5,700 (each direction)  |
| I-155      | Peoria - Springfield    | 5,300 (both directions) |



## 1

# Base Year Travel Demand

## Public Mode Person Trips

- **Air Passengers** (FAA October 2023)

Chicago – St. Louis ~ 1,300 per day in each direction

Chicago – Peoria ~ 200 per day in each direction

- **Rail Passengers** (Amtrak September 2023)

Chicago – Champaign ~ 260 per day/each way Illini service

Chicago – St. Louis ~ 230 per day/each way Lincoln

- **Long Distance Bus Service**

Inferred ridership from schedules



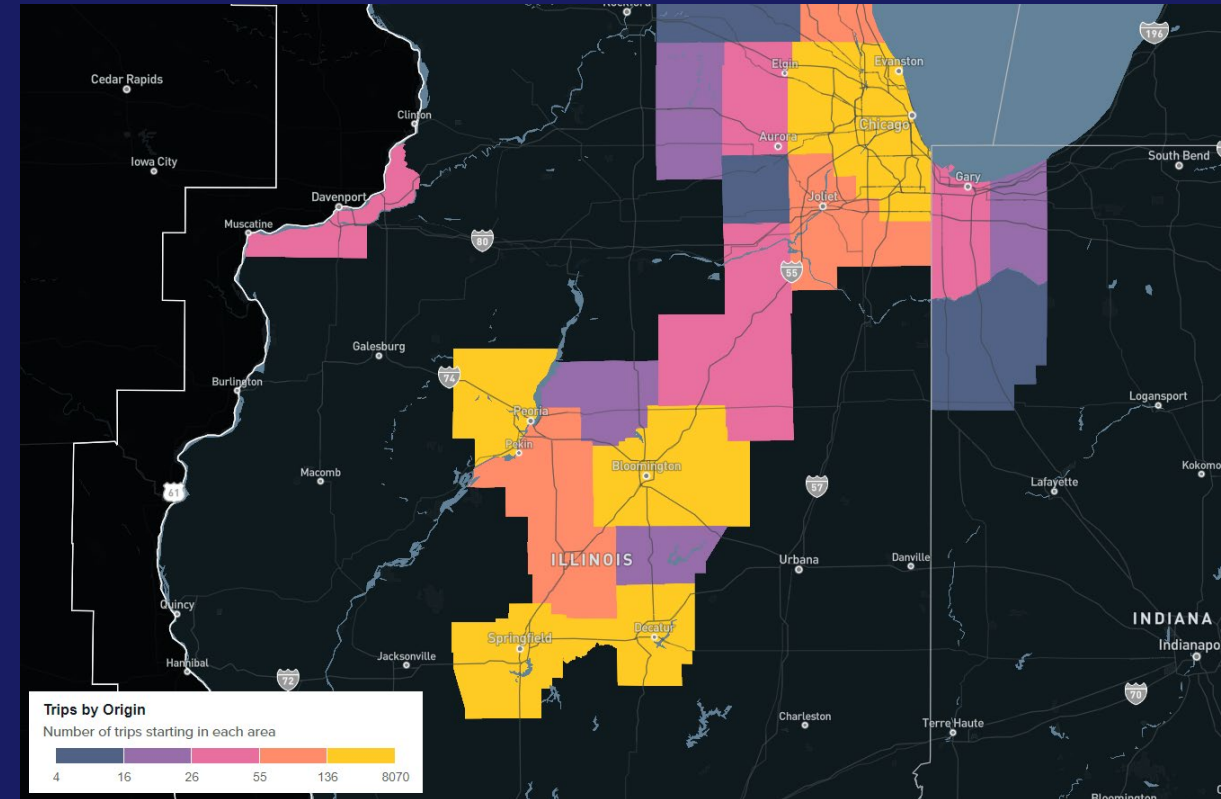
Image: heritage destinations

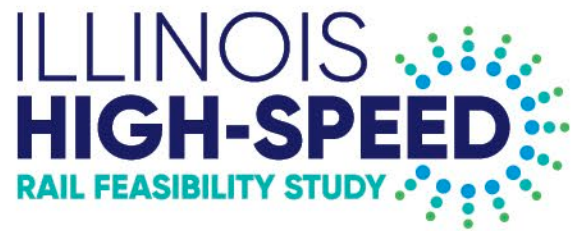
# 1 Base Year Travel Demand

Total Person Trips

## Replica

- Private data provider that uses location-based services (LBS) data collected from personal mobile devices and vehicle in-dash Global Positioning System (GPS) data to simulate travel patterns.
- Trips for census tract level origin and destination pair.
- Average Thursday and Average Saturday, Fall 2023





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# Questions?

On Establishing Total Demand

1

Establish total  
demand between  
city pairs

-----  
Existing trips by mode in  
the corridor  
Potential for growth

2

Estimate high speed  
rail's market share

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Preferences of current  
travelers (ILHSR survey)

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Customized forecasting  
tool for ILHSR  
-> Annual revenue and  
ridership by station pair

2

# Estimate High Speed Rail's Market Share

Preferences of Current Travelers

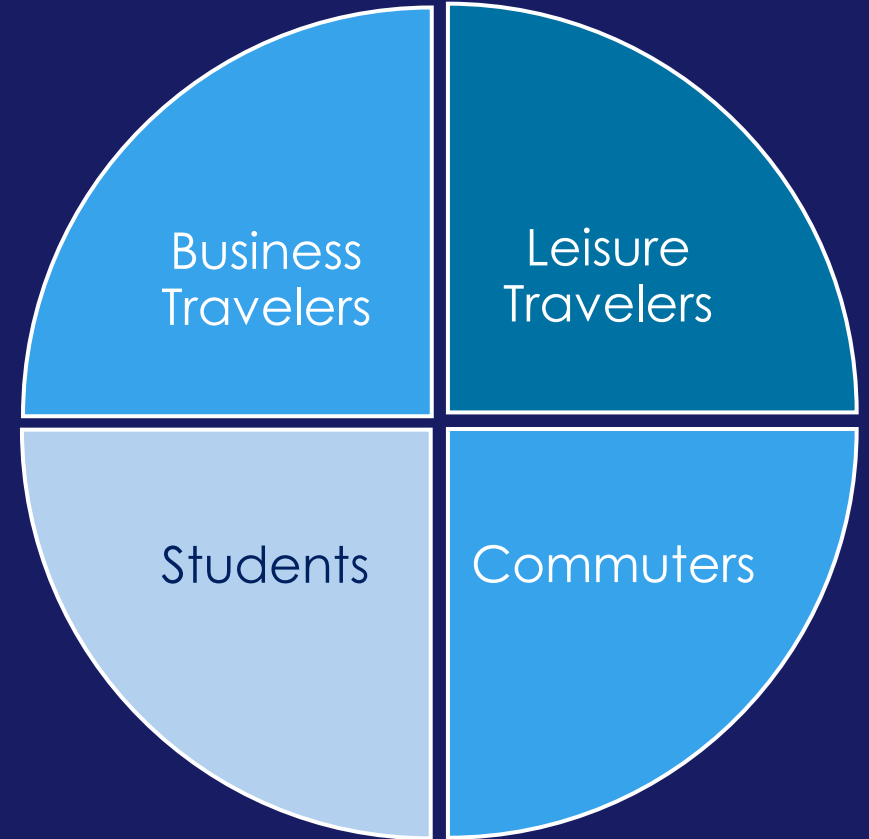
# Stated Preference Survey

Collected 3,200+ surveys during summer 2025

Learn about preferences of actual travelers

## How Do Travelers Value:

- New mode
- Travel time savings
- Increased reliability
- One-seat ride vs a transfer
- Access time vs in-vehicle time



# Sample Size and Survey Administration

| Study                   | Count        | Percent     |
|-------------------------|--------------|-------------|
| Onboard Amtrak Train    | 906          | 28%         |
| E-Panel                 | 1,834        | 56%         |
| University Distribution | 401          | 12%         |
| Toll User Database      | 109          | 3%          |
| <b>Total</b>            | <b>3,250</b> | <b>100%</b> |

## In-person interviews with tablet

Train passengers onboard Amtrak (Illini & Lincoln services)

## Self-administered

Residents of HSR Cities/Feeder Cities via e-panel

Students at University of Illinois Urbana-Champaign, University of Illinois Chicago, Illinois State University, University of Illinois Springfield

Drivers residing in Chicago/Rockford/ Moline with toll accounts

# Survey Methodology and Design

## Qualification criteria:

- Made a trip between an HSR/feeder city pair in the past 6 months
- Age 18 +

## Types of questions:

- Qualification
- Actual Trip Details
- Choice Exercise
- Demographics

# Survey Methodology and Design

- Personal interview with tablet
- Self-administered

Welcome to the Illinois Travel Study!

You were selected to participate in a study of travel options in the State of Illinois.

On the following pages, you will be asked questions about your travel habits and travel preferences. The results of this study will help us to better understand travel demand in the state and allow us to explore the possibility of new transportation options.

The survey will take approximately 10 minutes to complete.

Thank you in advance for your time.

# Survey Methodology and Design

If these were your only options to travel between Chicago metropolitan area and Greater St. Louis, IL-MO, which option would you choose?

(3 of 8)

| PERSONAL CAR                                                                      | AIR                                                                               | HIGH SPEED RAIL                                                                    |
|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|------------------------------------------------------------------------------------|
|  |  |  |
| ■■■■ door-to-door drive                                                           | ■■■■ to get to the airport and go through security screening                      | ■■■■ to get to the station                                                         |
| \$ ■■■■                                                                           | \$ ■■■■ total cost (all persons)                                                  | ■■■■ train ride<br>one seat ride (no transfer)<br>\$ ■■■■ total cost (all persons) |
| Select                                                                            | Select                                                                            | Select                                                                             |

Back Next

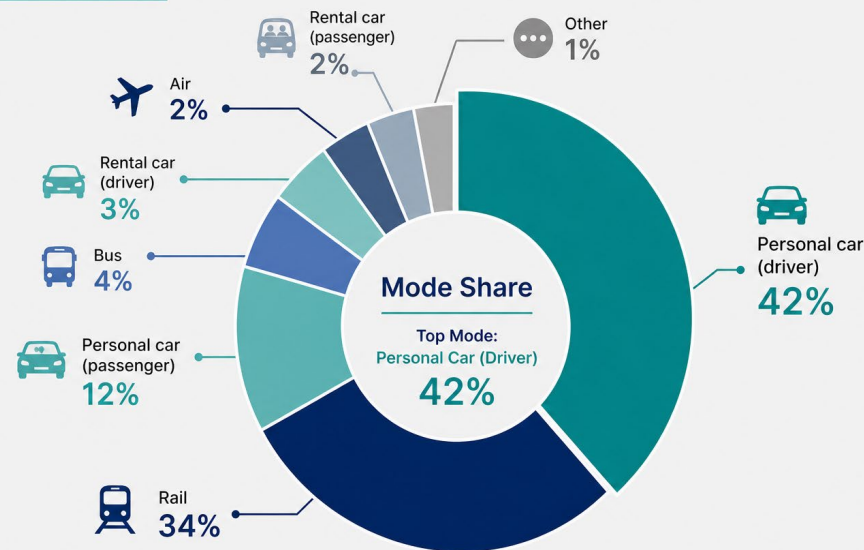
## Stated Preference Choice Exercise

- 8 to 10 Hypothetical Scenarios
- Choose one mode based on time and cost
  - Blacked out values shown in actual survey
- Assumes same characteristics as actual trip

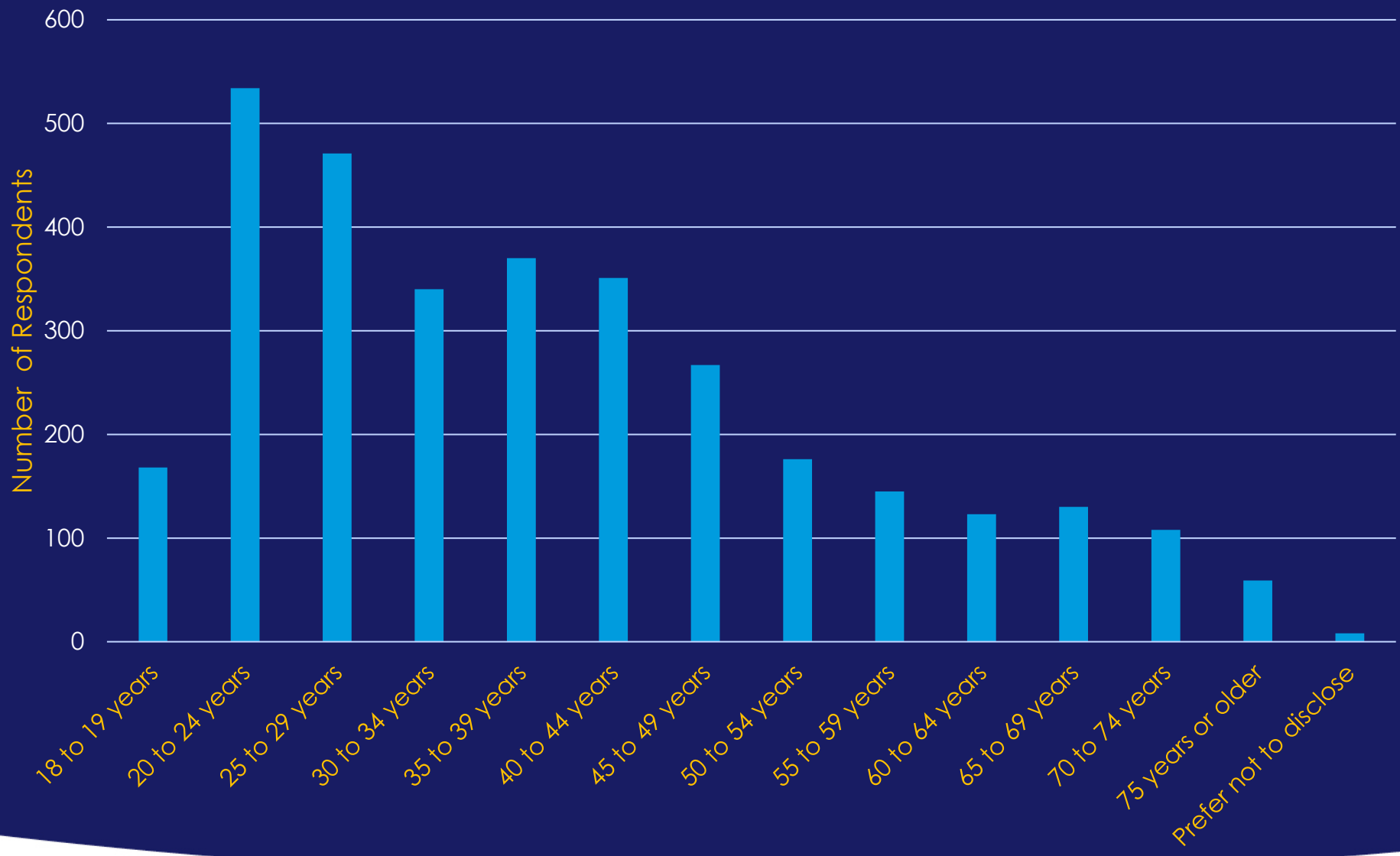
# Respondent Mode Choice By Survey

| Mode                     | E-Panel      | University | Toll User Database | Onboard Amtrak Train | Total        |
|--------------------------|--------------|------------|--------------------|----------------------|--------------|
| Air                      | 4%           | 1%         | 0%                 | 0%                   | 2%           |
| Bus                      | 4%           | 17%        | 0%                 | 0%                   | 4%           |
| Rail                     | 7%           | 17%        | 3%                 | 100%                 | 34%          |
| Personal car (driver)    | 62%          | 35%        | 85%                | 0%                   | 42%          |
| Personal car (passenger) | 15%          | 25%        | 9%                 | 0%                   | 12%          |
| Rental car (driver)      | 6%           | 1%         | 2%                 | 0%                   | 3%           |
| Rental car (passenger)   | 2%           | 2%         | 0%                 | 0%                   | 2%           |
| Other                    | 1%           | 1%         | 1%                 | 0%                   | 1%           |
| <b>Total (count)</b>     | <b>1,834</b> | <b>401</b> | <b>109</b>         | <b>906</b>           | <b>3,250</b> |

Mode Share (%)

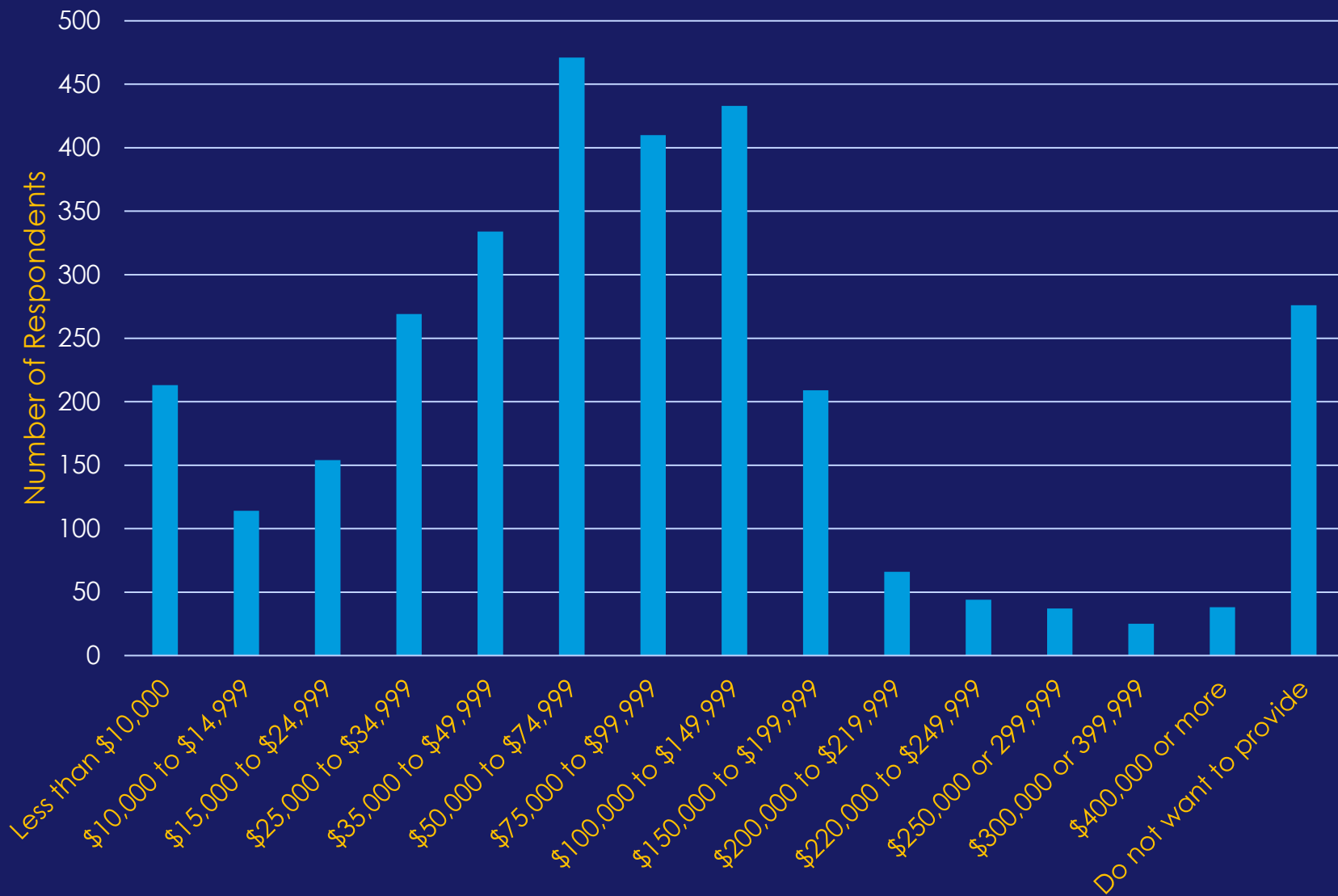


# Respondent Age



# Respondent Household Income

2



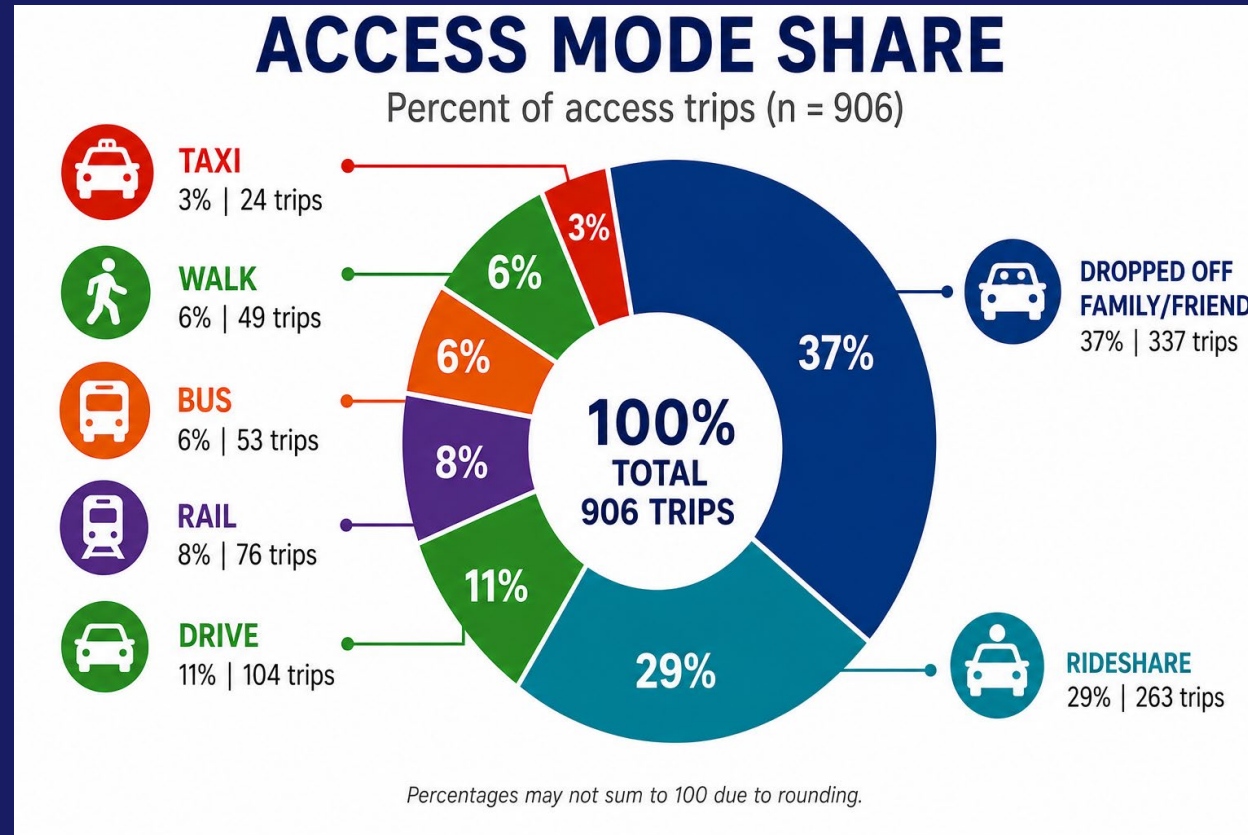
# Onboard Amtrak Survey

- Travel purpose (906 respondents)
  - 7% business + 3% combination of business and leisure
  - 2% commute
  - 4% school
  - 84% other (leisure, family, personal)

# Amtrak Onboard Survey

2

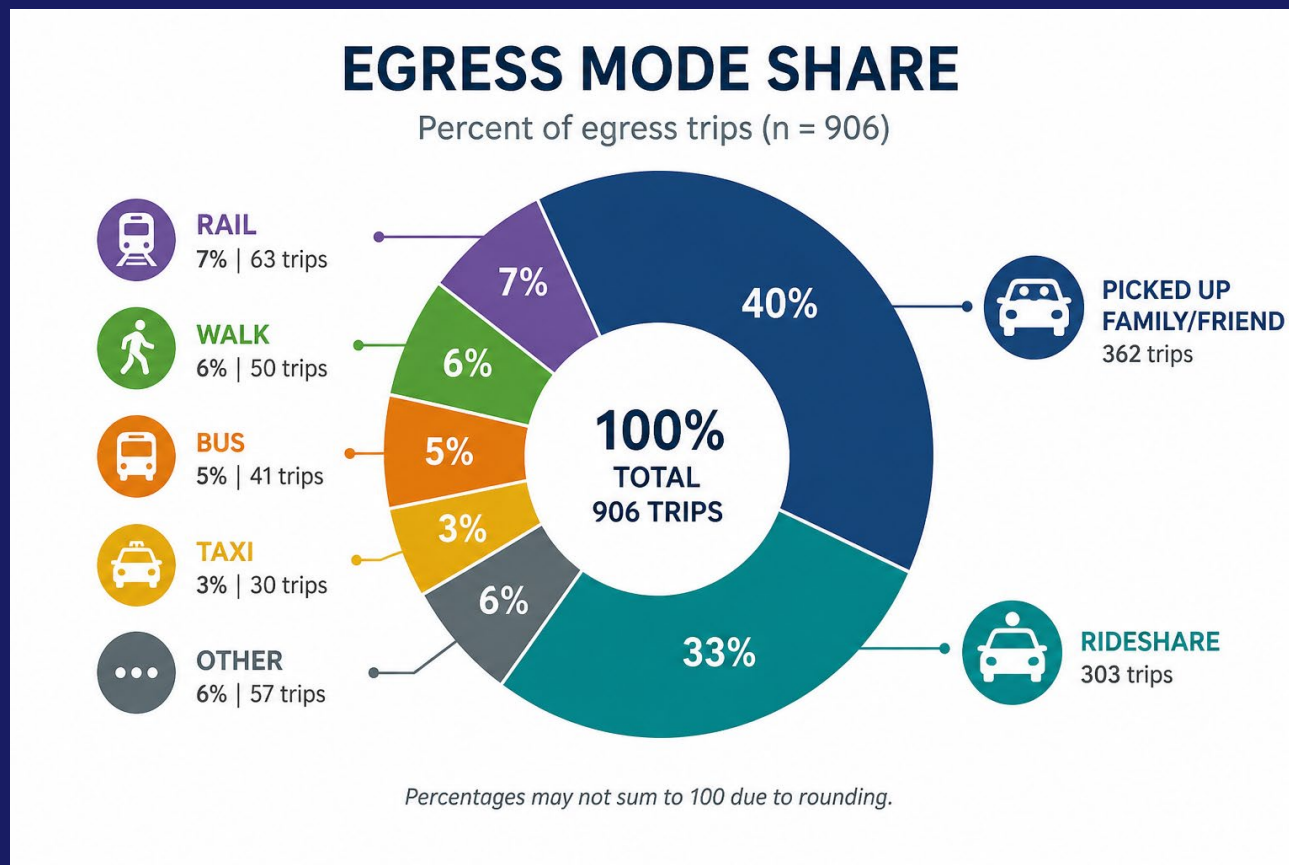
## Station Access Mode



# Amtrak Onboard Survey

2

## Station Egress Mode

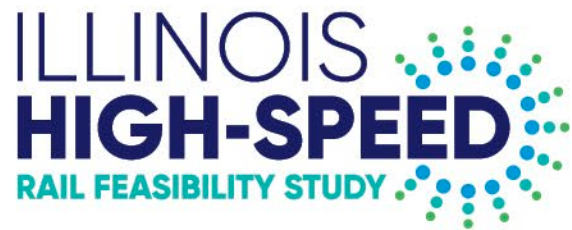


# Amtrak Onboard Survey

2

## Most Frequent Access and Egress Mode Combinations

- Dropped off by family/friend at origin station and use ride share at destination station or opposite: 26%
- Dropped off by family/friend at origin station and picked up by family/friend at destination station: 14%
- Rideshare at both origin and destination: 12%



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# Questions?

on SP Survey

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# Estimate High Speed Rail Demand

Model Development

Ridership and Revenue Forecasts

# Model Development

Model Structure  
Model Estimation  
Peer Review

# Model Structure

3

Model Years:

- Base: 2023
- Future: 2045

Segmentation:

- Geographic: census tract pairs
- Temporal: Peak/off-peak
- Trip purpose
- Household income

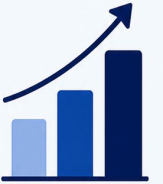
Calibrated to observed mode split at distance group

## Trip Segmentation

### 1. INCOME GROUP



- < than \$50K
- \$50k-150K
- > \$150k



### 2. TRIP PURPOSE



- Business
- Non-business



### 3. DISTANCE TRAVELED



- <less than 120 miles
- 120-200 miles
- > 200 miles



# Model Structure

3

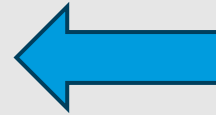
## Model Inputs

- Base and future year trip tables
- HSR Service Assumptions
- Competing Mode Service Characteristics



## Mode Choice Model

Estimates mode split based on how travelers value the different mode characteristics.



## Model Outputs

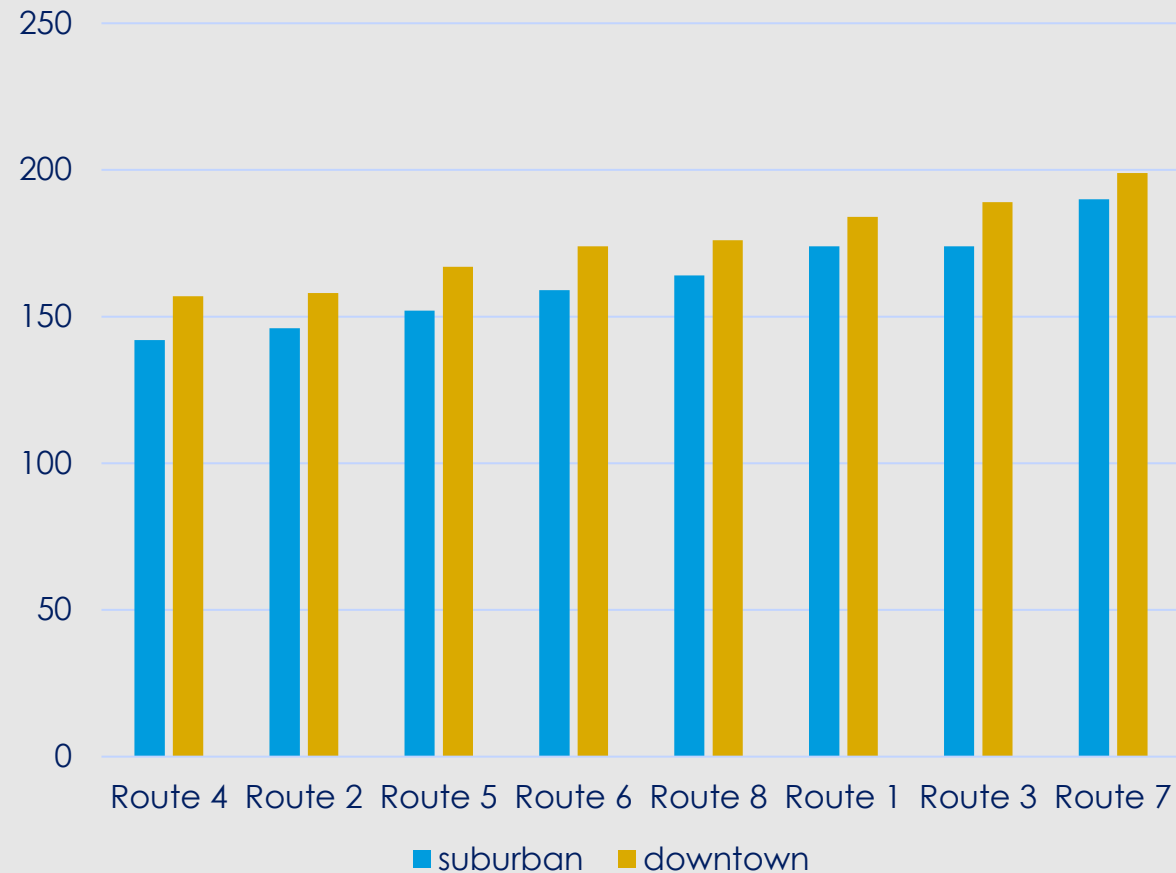
- Mode split
- HSR diverted and induced ridership
- HSR fare revenue

# HSR Service Assumptions

3

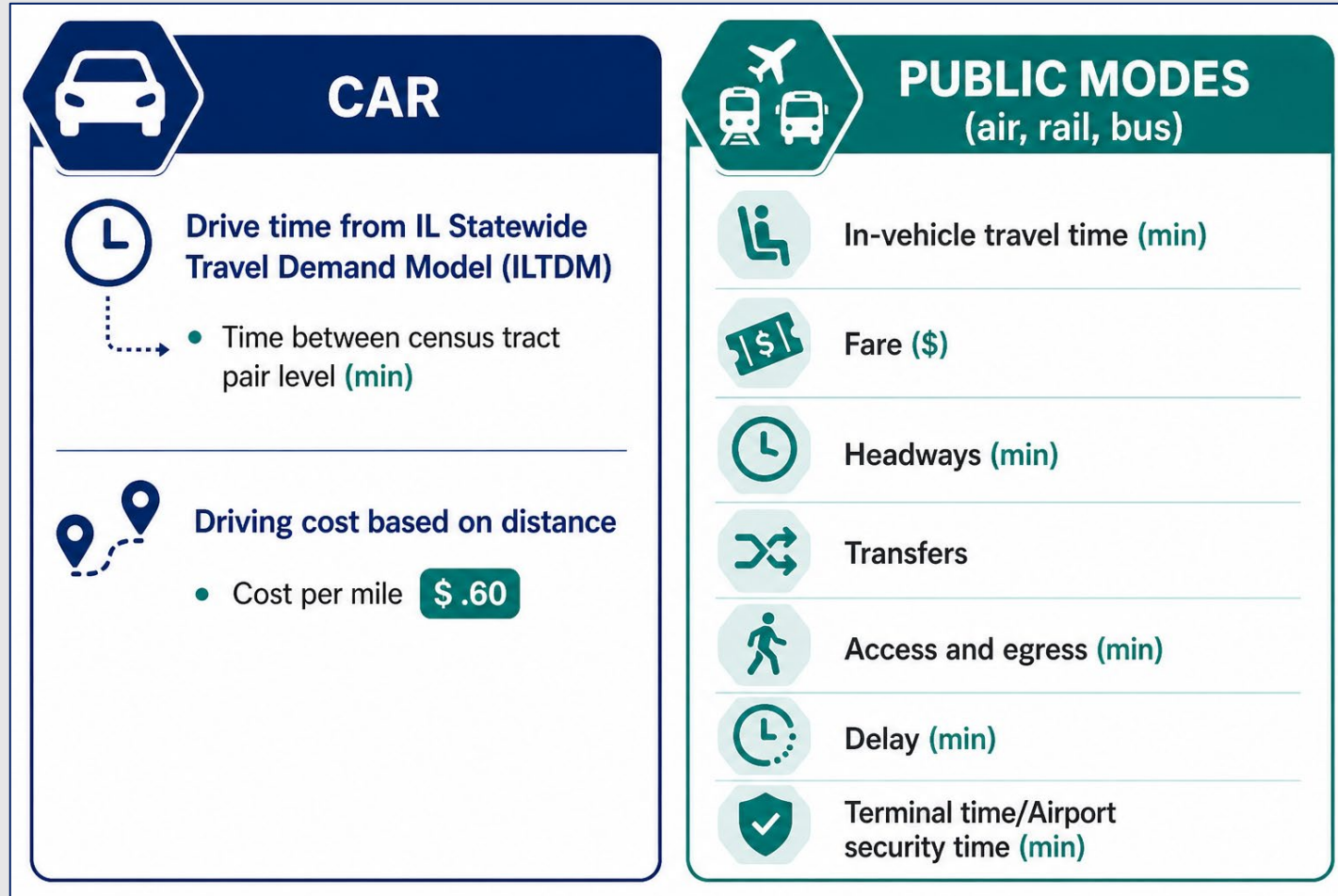
- In-vehicle time (see graph)
- Headways: 60 minutes
- Fare per mile: \$0.4
- Terminal time: 20 minutes
- Transfers: 0
- Delay: High reliability (1% chance of delay)
- Station access/egress time and cost
  - Calculated by originating tract to station tract
  - Travel time from IL Statewide Model

CHI to STL In-vehicle Travel Times



# Competing Mode Characteristics

3



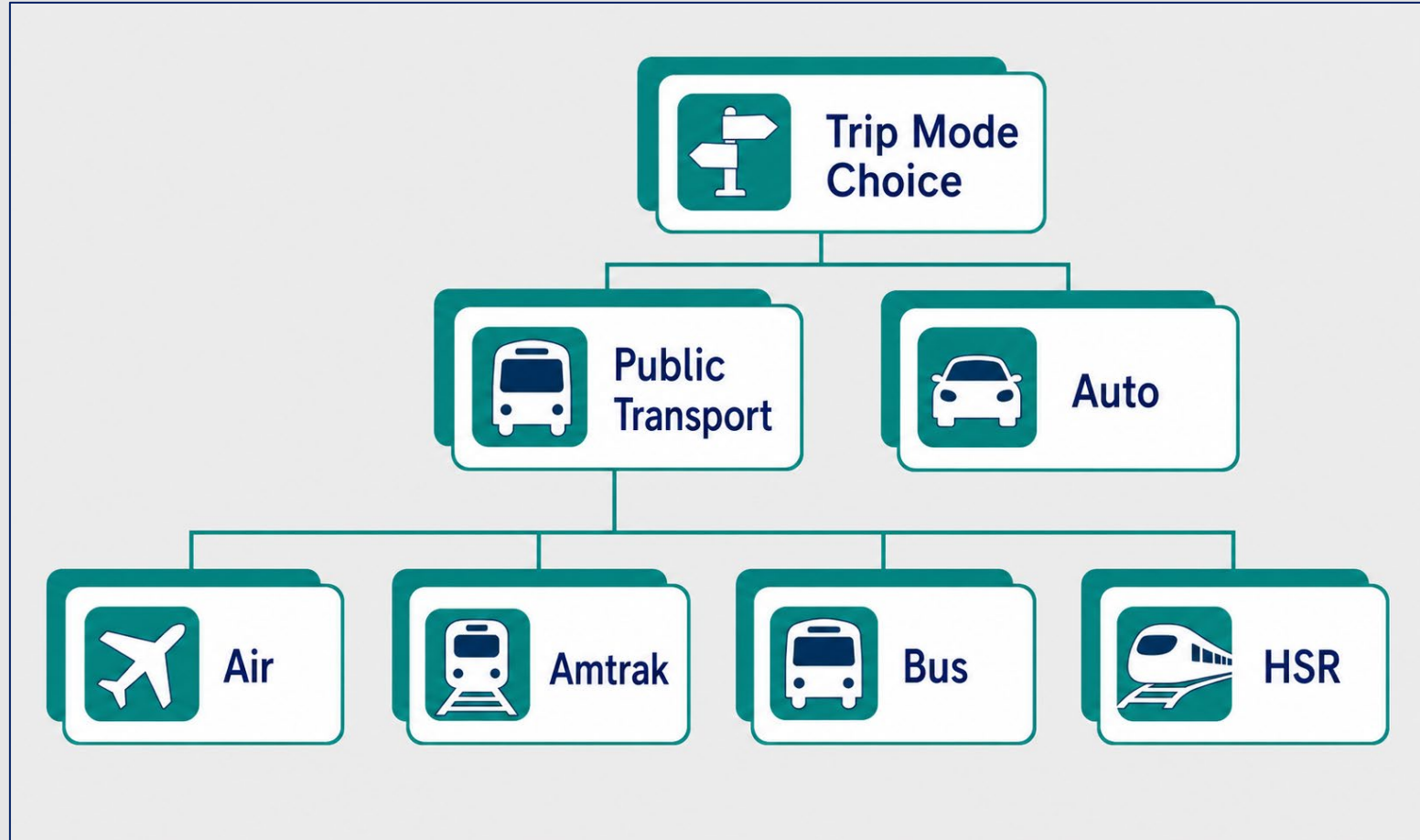
# Mode Choice Model

3

## Nested Logit Model

Random Utility Maximization Theory

- Everyone chooses option that maximizes their “satisfaction” (utility)
- Observed and unobserved (random) components of utility
- Public modes have unobserved characteristics in common. -> Switch from other public modes is more likely than switch from car.



# Peer Review

3

- Review by Whitehouse Group

- Model structure and parameters
- Base year ridership forecasts with estimated model
- Compared to other systems ridership



- Recommendations

- Assert IVTT coefficient to make model more sensitive to time
- Test different HSR alternative specific constant (ASC)
- Update base calibration

# Comparison to other Intercity Rail Forecast Parameters

3

|                                    | Time coefficient<br>(in utils) | Implied VOT             | Implied VOT<br>(in 2024 \$) |
|------------------------------------|--------------------------------|-------------------------|-----------------------------|
| Brightline Florida<br>(WSP)        | -0.004                         | \$30-\$43 (in 2016 \$s) | \$39 - \$56                 |
| Cal HSR<br>(Cambridge Systematics) | -0.0035/-0.0065                | \$11-\$29 (in 2014 \$s) | \$15 - \$38                 |
| Cal HSR<br>(Steer)                 | -0.005/-0.008                  | \$17-\$76 (in 2018 \$s) | \$21**- \$95                |
| ILHSR estimated                    | -0.0024/-0.0027                | \$16-\$88 (in 2024 \$s) | \$16***- \$88               |
| ILHSR asserted                     | -0.0047/-0.0054                | \$16-\$88 (in 2024 \$s) | \$16***- \$88               |

Lowest income category: \*\*\$62K, \*\*\*\$50K

# Calibration to Observed Mode Split

3

| Distance Group      | Mode | Observed | Modeled | Difference |
|---------------------|------|----------|---------|------------|
| More than 200 miles | air  | 38%      | 40%     | +2%        |
|                     | rail | 11%      | 11%     | 0%         |
|                     | bus  | 3%       | 4%      | +1%        |
|                     | car  | 48%      | 46%     | +2%        |
| Between 120 and 200 | air  | 4%       | 1%      | -3%        |
|                     | rail | 7%       | 7%      | 0%         |
|                     | bus  | 3%       | 7%      | +4%        |
|                     | car  | 86%      | 86%     | 0%         |
| Less than 120 miles | air  | 0%       | NA      | NA         |
|                     | rail | 1%       | 1%      | 0%         |
|                     | bus  | 1%       | 1%      | 0%         |
|                     | car  | 98%      | 98%     | 0%         |

Calibration:  
align model  
outcomes with  
mode-specific  
city-pair  
observed  
demand

# Validation

3

| Pair                | Mode  | Observed | Modeled       |
|---------------------|-------|----------|---------------|
| Chicago – St. Louis | Air   | 1,300    | 1,160 - 1,250 |
| Chicago – St. Louis | Train | 230      | 290 - 330     |
| Chicago- Champaign  | Train | 260      | 250 - 300     |

Asserted model, range is a function of different routes (city pairs)

Validation: demonstrate system aligns with observed demand on modal services



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# Questions?

On ILHSR Model Development

# ILHSR Forecasts

Low & High Forecasts  
Sensitivity Tests

# HSR Forecast and Sensitivity Tests

3

- **Top Routes for Final Analysis**

- Routes 3, 4, 5, and 9
- Diverted & Induced
- Lower Forecast
  - Estimated Parameters
- Higher Forecast
  - Asserted Parameters
- Suburban & Downtown Stations

- **Base Forecast Assumptions**

- 60 Minute Headway
- Fare per mile \$ .40
- Terminal time: 20 min
- Transfers: 0
- Suburban station locations
- No feeder network

- **Sensitivity tests**

- Frequency tested at 30/120 Min Headways
- Fare sensitivity

\*Other Route results are available

# Base Year Daily Ridership & Revenue

Estimated and Asserted Models

3

|         |                  | 2023            |               | 2023            |               |              |           |     |
|---------|------------------|-----------------|---------------|-----------------|---------------|--------------|-----------|-----|
|         |                  | Estimated       |               | Asserted        |               |              |           |     |
| Route   | Station Location | Daily Ridership | Daily Revenue | Daily Ridership | Daily Revenue | Total Demand | HSR Share |     |
| Route 3 | Suburban         | 5,559           | \$ 416,020    | 6,614           | \$ 491,574    | 30,805       | 18%       | 21% |
| Route 4 | Suburban         | 5,748           | \$ 452,033    | 7,019           | \$ 554,657    | 30,805       | 19%       | 23% |
| Route 5 | Suburban         | 5,642           | \$ 437,136    | 6,924           | \$ 539,343    | 30,729       | 18%       | 23% |
| Route 9 | Suburban         | 5,419           | \$ 429,282    | 6,419           | \$ 505,173    | 30,729       | 18%       | 21% |

Note: HSR trips are diverted and induced trips

# Base Year Daily Ridership

(Using Asserted Model)

3

| Route   | Suburban Ridership | Downtown Ridership | % Diff |
|---------|--------------------|--------------------|--------|
| Route 3 | 6,614              | 7,645              | 16 %   |
| Route 4 | 7,019              | 8,060              | 15 %   |
| Route 5 | 6,924              | 7,863              | 14 %   |

| Distance Group (Miles) | Suburban Stations HSR Share | Downtown Stations HSR Share | % Change |
|------------------------|-----------------------------|-----------------------------|----------|
| > 200                  | 34%                         | 31%                         | -3%      |
| 120 to 200             | 24%                         | 26%                         | 2%       |
| < 120                  | 10%                         | 15%                         | 5%       |

# Base Year Daily Ridership (Using Asserted Model)

3

## Downtown Station Impacts



### + Benefits



More Walk Accessible



Car Not Needed



Higher Population & Employment in Buffer



Less Access Travel Time



Downtown-to-Downtown Easier



### – Tradeoffs



End-to-End Travel Time Higher



Lower Speeds in Key Locations



Distance Comparable



St Louis to Chicago Decreased  
(more later)

# Base Year Diversions

Route 4 with Suburban Stations  
Using Asserted Model

3

| Route 4                |                         |                    |            | Diverted From |       |       |      |
|------------------------|-------------------------|--------------------|------------|---------------|-------|-------|------|
| Distance Group (Miles) | Total Trips (all modes) | Diverted HSR Trips | HSR Share  | Air           | Bus   | Rail  | Auto |
| > 200*                 | 6,260                   | 2,119              | 34%        | -17%          | -2%   | -5%   | -11% |
| 120 to 200             | 13,291                  | 3,150              | 24%        | -1%           | -3%   | -3%   | -17% |
| < 120                  | 11,254                  | 1,124              | 10%        | N/A           | -0.5% | -0.5% | - 9% |
| <b>TOTAL</b>           | <b>30,805</b>           | <b>6,393</b>       | <b>21%</b> |               |       |       |      |

\*St Louis-Chicago Only

- Long Distance  
HSR competes with Air
- Medium and Short Distance  
HSR competes with Auto  
Minor diversion from rail/bus

Other routes similar pattern

# Base Year Daily Ridership

Route 4 with Suburban Stations  
Using Asserted Model

3

| Stations<br>(Downtown) | Chicago      | University<br>Park | Champaign    | Decatur    | Springfield | St Louis     | All Pairs    |
|------------------------|--------------|--------------------|--------------|------------|-------------|--------------|--------------|
| Chicago                | --           | 0                  | 953          | 153        | 226         | 1,038        | <b>2,370</b> |
| University Park        | 0            | --                 | 56           | 48         | 81          | 156          | <b>341</b>   |
| Champaign              | 968          | 62                 | --           | 215        | 123         | 131          | <b>1,498</b> |
| Decatur                | 172          | 51                 | 219          | --         | 61          | 104          | <b>607</b>   |
| Springfield            | 271          | 59                 | 122          | 68         | --          | 135          | <b>655</b>   |
| St Louis               | 1,051        | 128                | 129          | 104        | 136         | --           | <b>1,547</b> |
| <b>Total HSR Trips</b> | <b>2,462</b> | <b>300</b>         | <b>1,479</b> | <b>588</b> | <b>626</b>  | <b>1,563</b> | <b>7,019</b> |

- Highest Ridership between CHI & STL
- Champaign Key Station

% of Trips by Station (origin)

| Stations<br>(Downtown) | Chicago | University<br>Park | Champaign | Decatur | Springfield | St Louis | Total      |
|------------------------|---------|--------------------|-----------|---------|-------------|----------|------------|
| Chicago                | 0%      | 0%                 | 40%       | 6%      | 10%         | 44%      | <b>34%</b> |
| University Park        | 0%      | 0%                 | 16%       | 14%     | 24%         | 46%      | <b>5%</b>  |
| Champaign              | 65%     | 4%                 | 0%        | 14%     | 8%          | 9%       | <b>21%</b> |
| Decatur                | 28%     | 8%                 | 36%       | 0%      | 10%         | 17%      | <b>9%</b>  |
| Springfield            | 41%     | 9%                 | 19%       | 10%     | 0%          | 21%      | <b>9%</b>  |
| St Louis               | 68%     | 8%                 | 8%        | 7%      | 9%          | 0%       | <b>22%</b> |

# Base Year Daily Ridership

Route 4 with Downtown Stations  
Using Asserted Model

3

| Stations<br>(Downtown) | Chicago      | University<br>Park | Champaign    | Decatur    | Springfield | St Louis     | All Pairs    |
|------------------------|--------------|--------------------|--------------|------------|-------------|--------------|--------------|
| Chicago                | 0            | 0                  | 1,172        | 146        | 267         | 924          | 2,510        |
| University Park        | 0            | 0                  | 76           | 48         | 69          | 129          | 322          |
| Champaign              | 1,177        | 80                 | 0            | 285        | 167         | 141          | 1,850        |
| Decatur                | 159          | 48                 | 304          | 0          | 311         | 103          | 925          |
| Springfield            | 281          | 68                 | 160          | 306        | 0           | 170          | 984          |
| St Louis               | 941          | 112                | 136          | 102        | 177         | 0            | 1,469        |
| <b>Total HSR Trips</b> | <b>2,558</b> | <b>308</b>         | <b>1,849</b> | <b>888</b> | <b>991</b>  | <b>1,468</b> | <b>8,060</b> |

% of Trips by Station (origin)

| Stations<br>(Downtown) | Chicago | University<br>Park | Champaign | Decatur | Springfield | St Louis | Total |
|------------------------|---------|--------------------|-----------|---------|-------------|----------|-------|
| Chicago                | 0%      | 0%                 | 47%       | 6%      | 11%         | 37%      | 31%   |
| University Park        | 0%      | 0%                 | 23%       | 15%     | 21%         | 40%      | 4%    |
| Champaign              | 64%     | 4%                 | 0%        | 15%     | 9%          | 8%       | 23%   |
| Decatur                | 17%     | 5%                 | 33%       | 0%      | 34%         | 11%      | 11%   |
| Springfield            | 29%     | 7%                 | 16%       | 31%     | 0%          | 17%      | 12%   |
| St Louis               | 64%     | 8%                 | 9%        | 7%      | 12%         | 0%       | 18%   |

- Smaller City Pairs Increase
- Champaign moves to 2<sup>nd</sup> highest station
- Chi-St Louis Decreases

# Impact of Feeder Routes

## Route 4

| City        | Feeder mode | HSR station | Daily Trips to /from Chicago | Daily Trips to/from St. Louis |
|-------------|-------------|-------------|------------------------------|-------------------------------|
| Rockford    | Train       | Chicago     | N/A                          | 45                            |
| Moline      | Bus         | Joliet      | N/A                          | 51                            |
| Bloomington | Bus         | Champaign   | 1,864                        | 143                           |

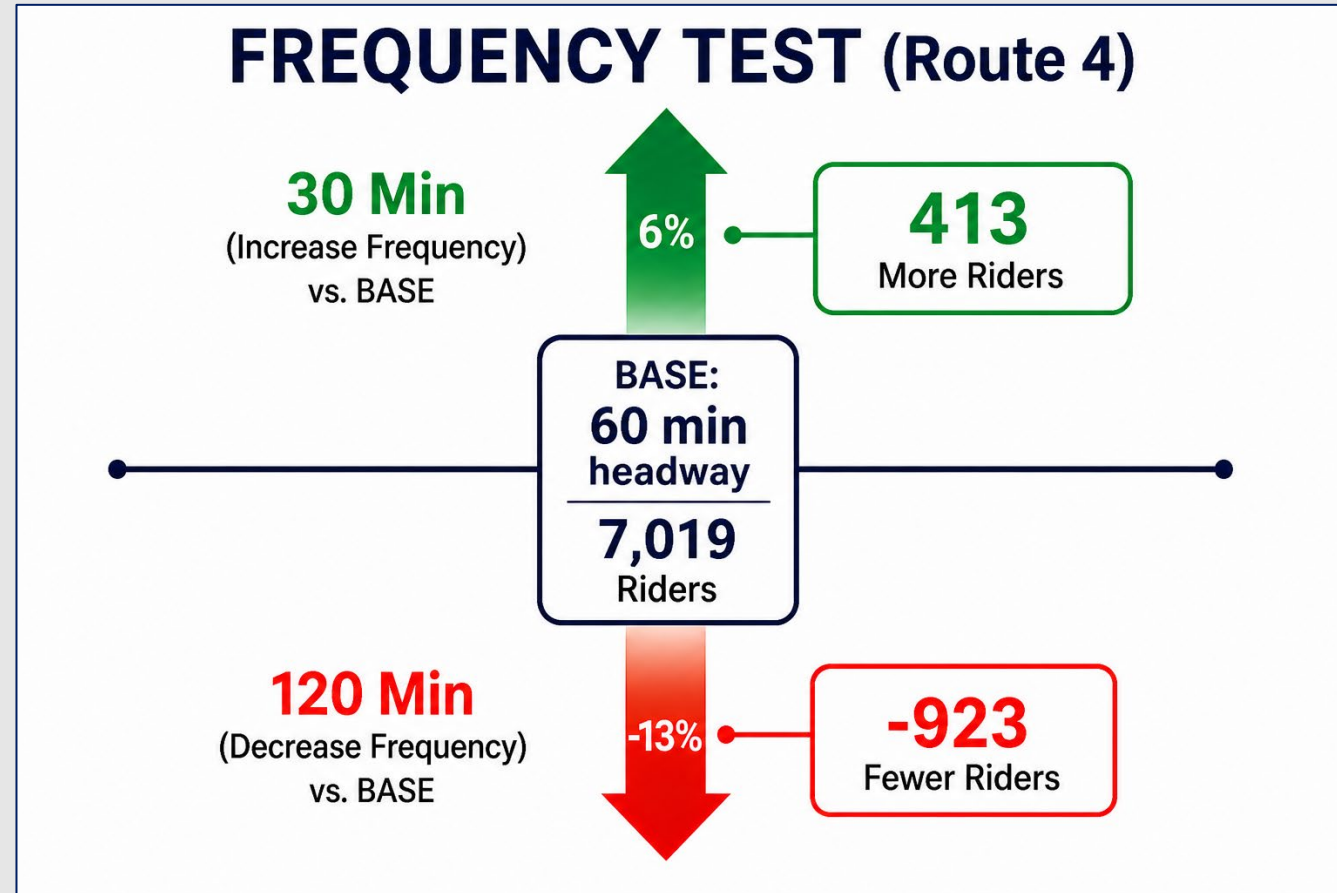
**5% HSR mode share: Increase of about 1%**

**10% HSR mode share: Increase of about 3%**

# Headway Sensitivity Test

(Asserted Model, relative to 2023 Base Forecast)

3

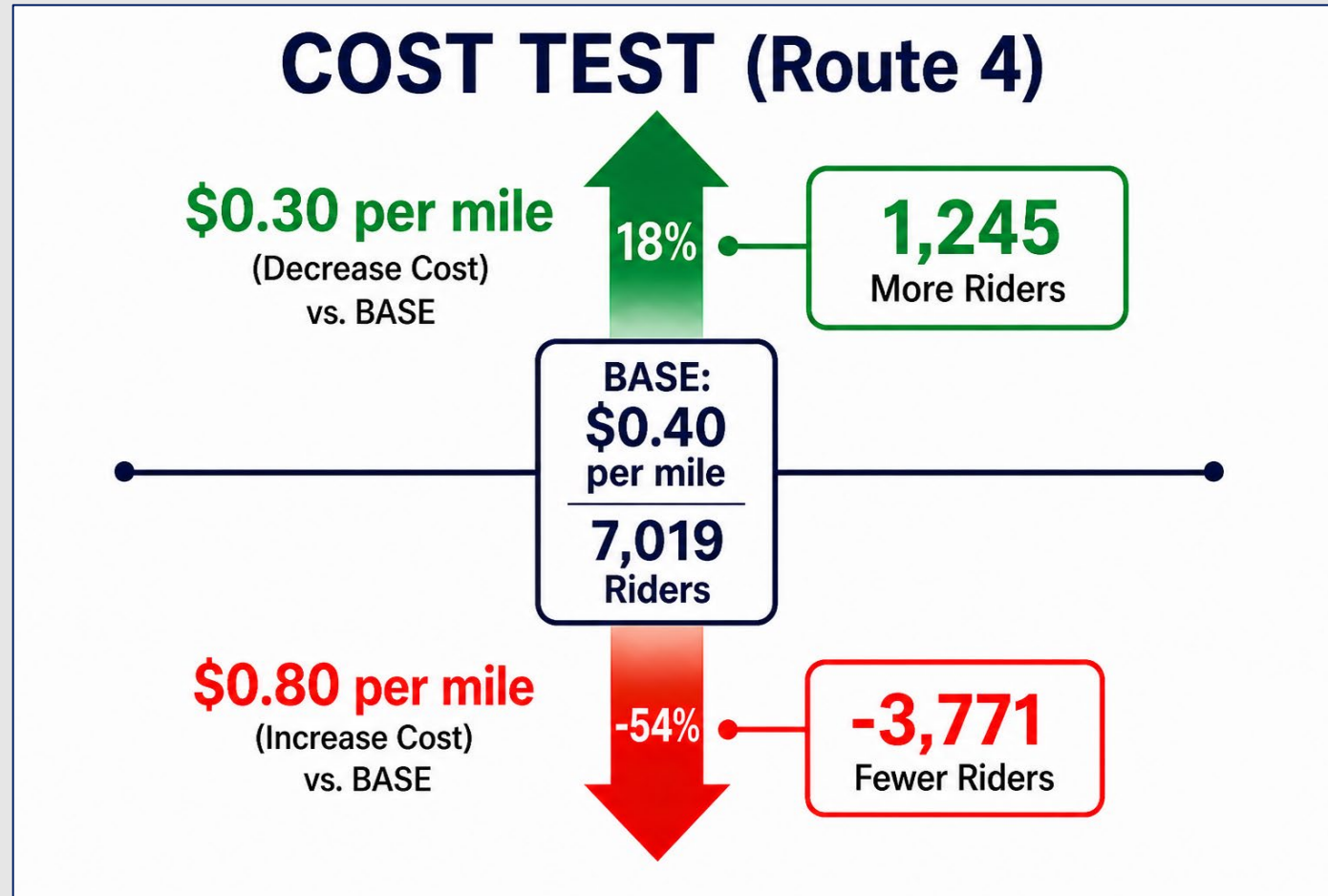


All Routes Follow Same Pattern

# Fare Sensitivity Test

(Asserted Model, relative to 2023 Base Forecast)

3



All Routes Follow Similar Pattern

# Future Forecast Inputs

- 2045 Household and Employment projections ILSTD
- County-level comparison of annual growth rate with Woods & Poole
- Growth 2025-2045 (44 counties)

|            | ILSTD | Woods & Poole |
|------------|-------|---------------|
| Households | 7%    | 2%            |
| Employment | 12%   | 15%           |

# Future Year Daily Ridership Forecast

(Asserted Model )

3

|         |                      | 2023      | 2023      | 2045      | 2045      | % Growth  | % Growth |
|---------|----------------------|-----------|-----------|-----------|-----------|-----------|----------|
|         |                      | Daily     | Daily     | Daily     | Daily     | Daily     | Daily    |
| Route   | HSR Station Location | Ridership | Revenue   | Ridership | Revenue   | Ridership | Revenue  |
| Route 3 | suburban             | 6,614     | \$491,574 | 7,107     | \$514,365 | 7%        | 5%       |
| Route 3 | downtown             | 7,645     | \$504,434 | 8,392     | \$531,429 | 10%       | 5%       |
| Route 4 | suburban             | 7,019     | \$554,657 | 7,538     | \$575,881 | 7%        | 4%       |
| Route 4 | downtown             | 8,060     | \$566,522 | 8,833     | \$594,997 | 10%       | 5%       |
| Route 5 | suburban             | 6,924     | \$539,343 | 7,426     | \$562,613 | 7%        | 4%       |
| Route 5 | downtown             | 7,863     | \$543,686 | 8,672     | \$573,542 | 10%       | 5%       |
| Route 9 | suburban             | 6,419     | \$505,173 | 6,900     | \$528,641 | 7%        | 5%       |

DAILY #

Chart in 2023 \$

- 7% Ridership Increase (2023 to 2045) Suburban
- 10% Ridership Increase (2023 to 2045) Downtown
- 4-5% Revenue Growth

# Comparison to Other Systems

| Name                                 | Data Year | South / West Starting Station | North / East Ending Station | Dist. Between Termini (Miles) | Travel Time Between Termini (Hours) | # of Stations | Daily Boardings | Passenger Boardings (Annual) |
|--------------------------------------|-----------|-------------------------------|-----------------------------|-------------------------------|-------------------------------------|---------------|-----------------|------------------------------|
| WSP - CHI-STL HSR Route 3 - Suburban | 2023      | St. Louis, MO                 | Chicago, IL                 | 304                           | 2.90                                | 6             | 6,614           | 2,314,909                    |
| WSP - CHI-STL HSR Route 3 - Downtown | 2023      | St. Louis, MO                 | Chicago, IL                 | 304                           | 2.90                                | 6             | 7,645           | 2,675,758                    |
| WSP - CHI-STL HSR Route 4 - Sub      | 2023      | St. Louis, MO                 | Chicago, IL                 | 310                           | 2.37                                | 6             | 7,019           | 2,456,534                    |
| WSP - CHI-STL HSR Route 4 - Downtown | 2023      | St. Louis, MO                 | Chicago, IL                 | 310                           | 2.37                                | 6             | 8,060           | 2,821,112                    |
| WSP - CHI-STL HSR Route 5 - Sub      | 2023      | St. Louis, MO                 | Chicago, IL                 | 306                           | 2.53                                | 5             | 6,924           | 2,423,345                    |
| WSP - CHI-STL HSR Route 5 - Downtown | 2023      | St. Louis, MO                 | Chicago, IL                 | 306                           | 2.53                                | 5             | 7,863           | 2,752,002                    |
| WSP - CHI-STL HSR Route 9 - Sub      | 2023      | St. Louis, MO                 | Chicago, IL                 | 306                           | 2.88                                | 6             | 6,419           | 2,246,764                    |
|                                      |           |                               |                             |                               |                                     |               |                 |                              |
| <u>Amtrak - Lincoln Service</u>      | 2024      | St. Louis, MO                 | Chicago, IL                 | 284                           | 4.91                                | 11            |                 | 586,135                      |
| Amtrak - Acela WAS to BOS            | 2024      | Washington                    | Boston                      | 342                           | 5.39                                | 15            |                 | 3,238,119                    |
| Brightline - Miami - Orlando         | 2024      | Miami, FL                     | Orlando, FL                 | 235                           | 3.30                                | 6             |                 | 2,763,512                    |

# Route 4 Forecast Summary

- Downtown stations results in 15% higher ridership compared to suburban stations (~ 1,000 daily riders) 
- Increasing headways from 60 min. to 120 min. decreases ridership by 13% (~1,000 daily riders) 
- Decreasing fare per mile from \$.40 to \$.30 fare increases ridership by 18% (~1,200 daily riders) 
- Future year provides modest ridership increase ( 7-10%) 



*Strengthening our State. Connecting the Region.*

# Discussion?

On Ridership Forecasting

# O&M, Revenue, and Subsidy

# O&M Costs

- Reviewed CAHSR and Colorado ICS O&M costs
  - CAHSR - Merced to Bakersfield
  - Colorado ICS – Ft. Collins to Pueblo
- Both were developed from the ground up using O&M cost models
  - Equipment maintenance
  - Train and engine crews
  - Fuel and energy
  - Onboard service crews
  - Insurance
  - Sales and marketing
  - Service administration
  - Track and ROW maintenance
  - Station operations

# O&M Costs

|                 | Cost/Train Mile (low)<br>(2025\$) | Cost/Train Mile (high)<br>(2025\$) |
|-----------------|-----------------------------------|------------------------------------|
| California HSR* | \$128.11                          | \$145.13                           |
| CDOT ICS**      | \$98.07                           | \$128.67                           |

\*California HSR Business Plan 2026

\*\*CDOT ICS Operating & Maintenance Methodology Cost, 2017

# Ancillary Revenue

- California HSR includes the following for ancillary revenues:
  - Advertising
  - Baggage fees
  - Excess land sales
  - Parking fees
  - Retail at stations
  - Sponsorship – station and system naming
  - Fiber optics
  - Telecommunication towers
  - Ground leasing to utilities
  - EV charging
  - Food and beverage
  - Express cargo
  - Track access charges
- Assuming that ancillary revenues are 12% of fare revenues

# Subsidy – Route 4

| Route 4        | O&M Cost<br>(2025\$) | Total Revenue<br>(2025\$) | Subsidy<br>(2025\$) |
|----------------|----------------------|---------------------------|---------------------|
| 16 Round Trips | \$490 million        | \$232 million             | \$258 million       |
| 8 Round Trips  | \$245 million        | \$202 million             | \$43 million        |

# Subsidies – 16 RT

|         | O&M Cost<br>(2025\$) | Total Revenue<br>(2025\$) | Subsidy (2025\$) |
|---------|----------------------|---------------------------|------------------|
| Route 3 | \$480 million        | \$206 million             | \$274 million    |
| Route 4 | \$490 million        | \$232 million             | \$258 million    |
| Route 5 | \$499 million        | \$225 million             | \$274 million    |
| Route 9 | \$502 million        | \$211 million             | \$291 million    |

# Subsidies – 8 RT

|         | O&M Cost<br>(2025\$) | Total Revenue<br>(2025\$) | Subsidy (2025\$) |
|---------|----------------------|---------------------------|------------------|
| Route 3 | \$241 million        | \$178 million             | \$63 million     |
| Route 4 | \$245 million        | \$202 million             | \$43 million     |
| Route 5 | \$250 million        | \$195 million             | \$55 million     |
| Route 9 | \$251 million        | \$182 million             | \$69 million     |

# Potential Path Forward

- Implement 8 RT operating plan with future expansion to 16 RT
- Build segments incrementally (1) Chicago-Champaign/Urbana, 2) Champaign/Urbana to Springfield, 3) Springfield to East St. Louis)

# Potential Path Forward

- Return on Investment

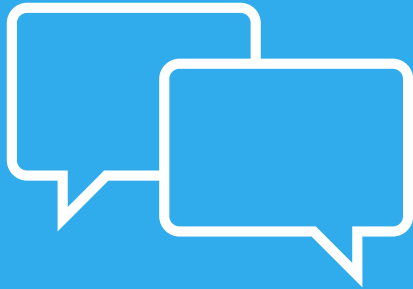
| Perspective      | Constituency                                                  | HS&IPR Public Policy Talking Points (benefit issues)                                                                                                                                                                                                                                        |
|------------------|---------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| National Benefit | US (taxpayers, residents, and business)                       | <ul style="list-style-type: none"><li>• saves time, expense, and improves safety for travelers</li><li>• enhances national productivity and hence GDP</li><li>• can alleviate the need for investments in aviation and highway systems</li><li>• reduces greenhouse gas emissions</li></ul> |
| State Benefit    | State (taxpayers, residents, business)                        | <ul style="list-style-type: none"><li>• enhances efficiency of the state's highway, rail, and aviation facilities</li><li>• effectively enlarges labor and business markets</li><li>• leads to more economic activity and tax base growth over time</li></ul>                               |
| Local Benefit    | Station area, city, or metro (taxpayers, residents, business) | <ul style="list-style-type: none"><li>• supports growth (of jobs, income, investment) around HSR stations, adding tax revenue</li><li>• visitors may also dwell longer and spend more money in the city</li></ul>                                                                           |

# Next Steps

- Planning for final virtual public meeting
- Finalize ridership and revenue forecasts
- Completing technical memoranda
- Completing final report

# Thank you!

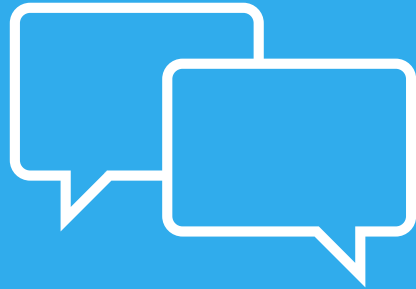
# GOVERNANCE



## Governance Discussion



# HOUSE BILL 4442: HIGH-SPEED RAIL COMMISSION



## Discussion of House Bill 4442: High-Speed Rail Commission

*Led by Commissioner Rick Harnish*

# PUBLIC COMMENT



We will now open the floor for public comment.



# Adjournment

**Jim Derwinski**, Chair, HSR Commission

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