



# **KEY PERFORMANCE INDICATORS (KPI) REPORT**

**FOR 1st Quarter through September 30, 2023**

Board of Directors

*December 15, 2023*

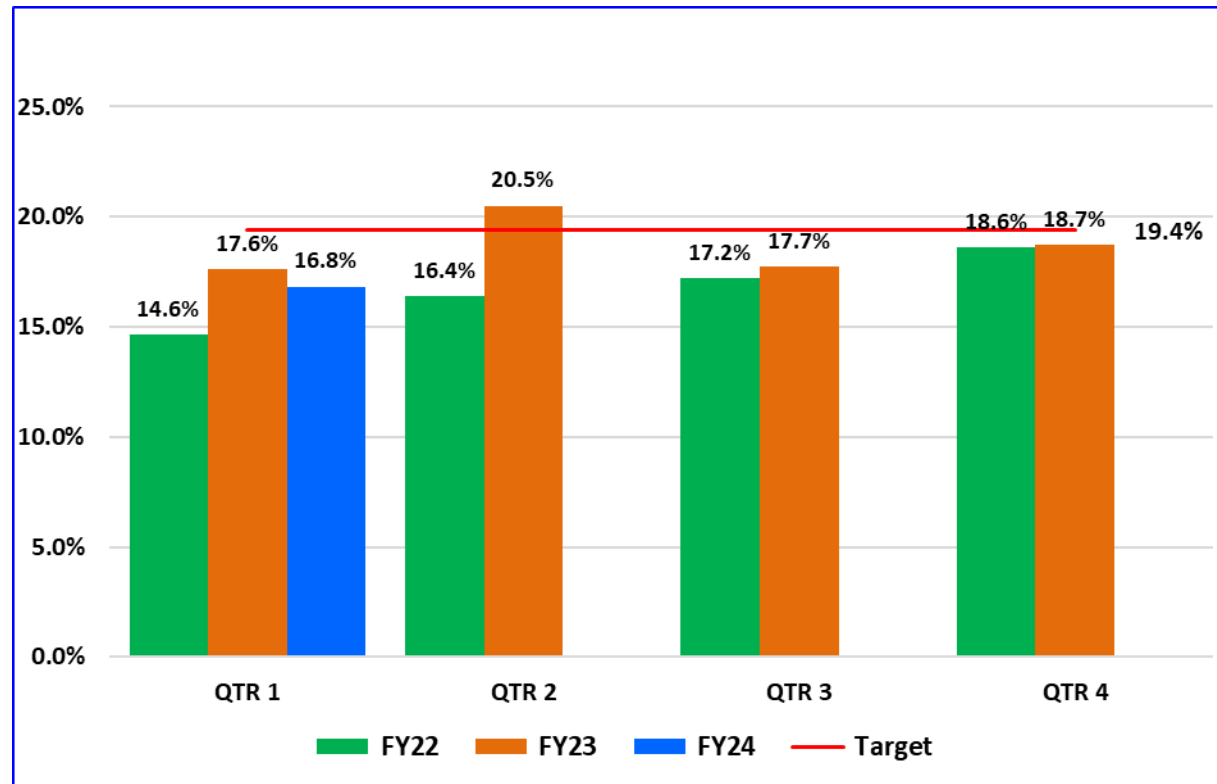
Chuck Farmer, Chief Financial Officer

# Overview of Today's Presentation:

KPI Category	Criteria / Metric
Financial Performance	<ul style="list-style-type: none"><li>✓ System Farebox Recovery Ratio</li><li>✓ Fixed Route &amp; Commuter Cost / RSH</li><li>✓ ParaCruz Cost / Trip</li></ul>
Productivity	<ul style="list-style-type: none"><li>✓ Total Ridership and Total Ridership / Hour</li><li>✓ UCSC, Cabrillo, Highway 17, &amp; Local Ridership</li><li>✓ Passengers / RSH by Route</li></ul>
Risk Management & Safety	<ul style="list-style-type: none"><li>✓ Traffic Accidents</li><li>✓ Passenger Incidents</li></ul>
Reliability	<ul style="list-style-type: none"><li>✓ Miles between Chargeable Road Calls for Fixed Route, Highway 17, &amp; ParaCruz</li></ul>
Dependability	<ul style="list-style-type: none"><li>✓ Cancelled Trips by Cause &amp; Region</li><li>✓ Pass-Ups for Fixed Route, UCSC, &amp; Routes</li></ul>

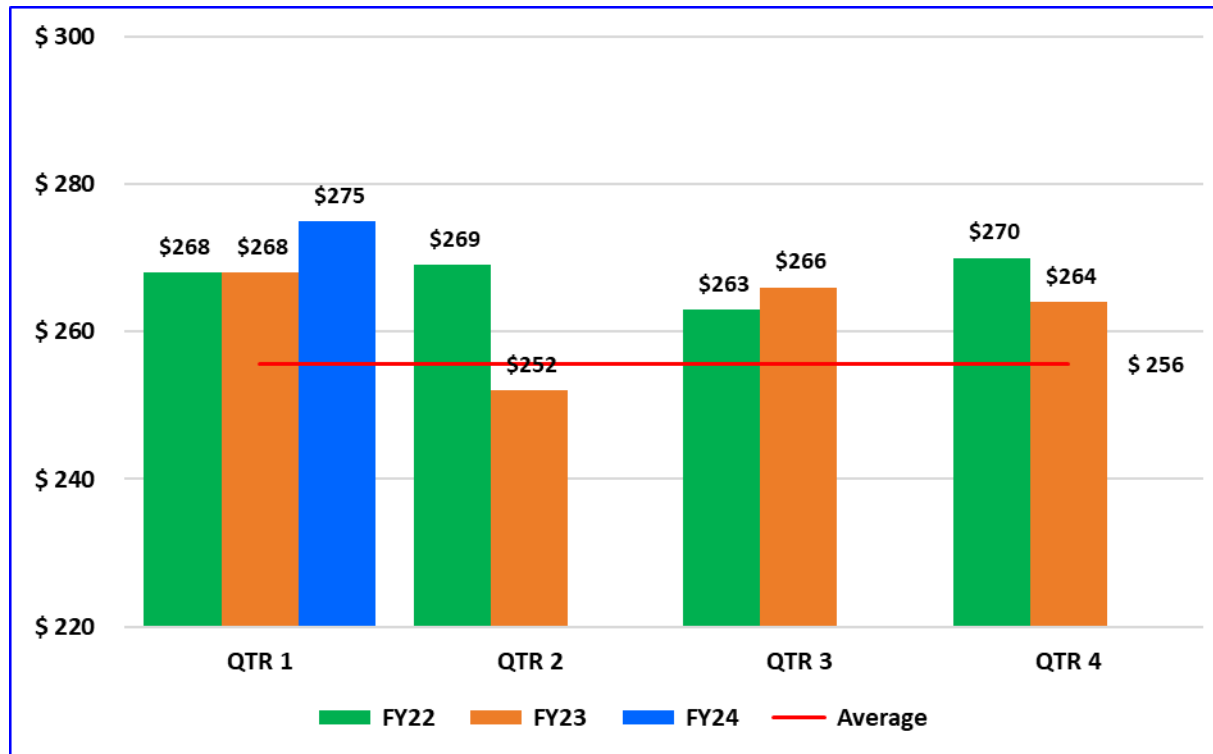
# **Financial Performance KPI's**

## System Farebox Recovery:



- Q1 FY24 Farebox Recovery is 16.8%, a year-over-year decline of 0.8% primarily due to Youth Free Fares; 2.5% lower than target and 1.8% lower than Q4 FY23 partially due to Free Fares to the Santa Cruz County Fair in September.
- The Farebox Recovery Target of 19.4% is based on the average actuals from FY19, FY22, FY23 (excludes FY20/FY21 due to COVID impact)

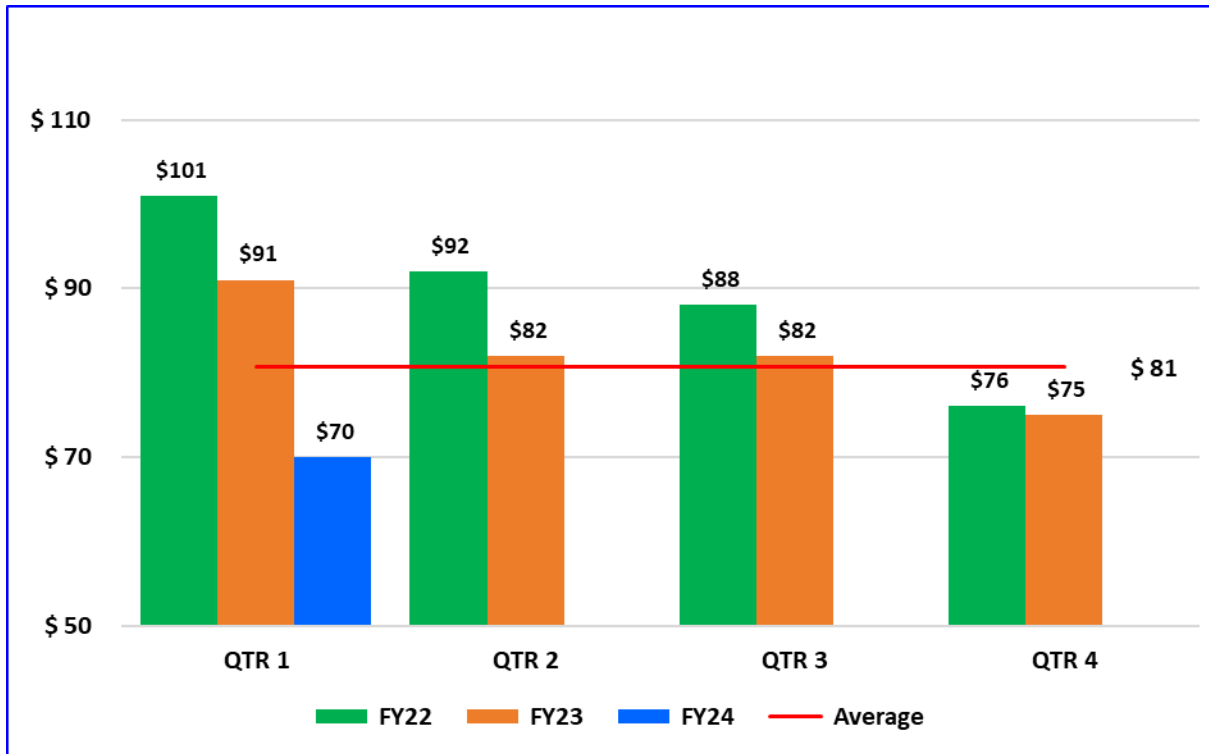
# Fixed Route/Commuter Cost per RSH



- Q1 FY24 Cost per RSH is \$275, a modest increase (\$7) over last year's Q1 costs, and \$19 higher than average due to higher labor costs and marketing costs related to the Reimagine Metro campaign
- Revenue Service Hours increased 3.4% along with Fixed Route costs that increased by 6.4% when compared to the same time period FY23
- The Fixed Route/Commuter cost per RSH average of \$256 is based on the average actuals from FY19, FY22, and FY23 (excludes FY20/FY21 due to COVID impact)

*\* Quarterly amounts and average have been updated to reflect corrected data*

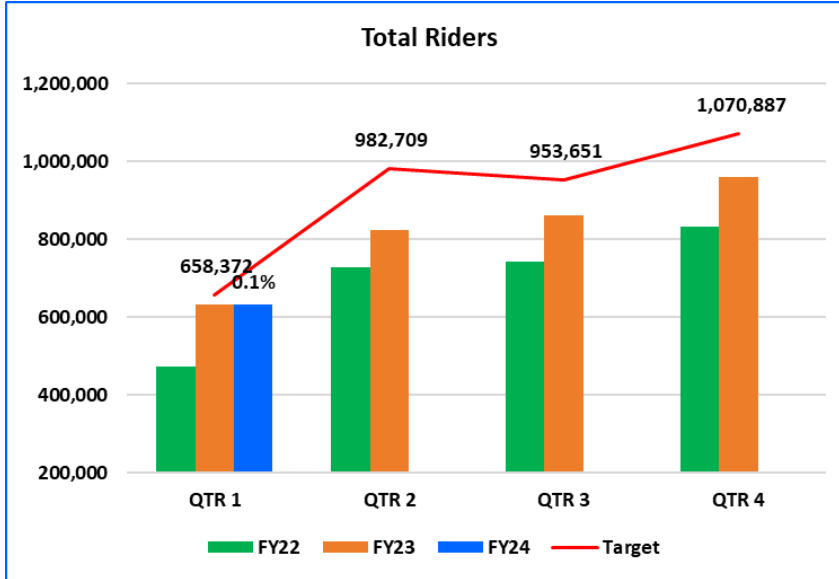
## ParaCruz Cost per Trip



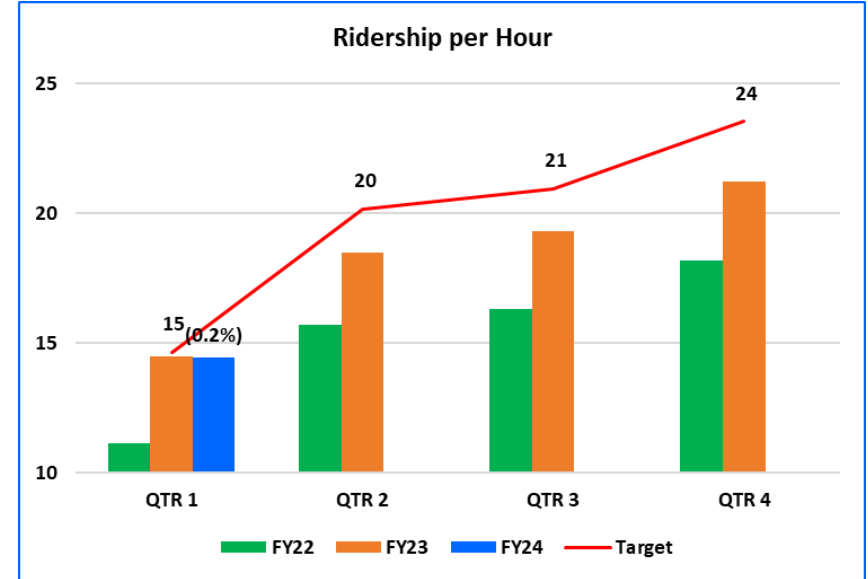
- Q1 FY24 Cost per Trip is \$70, a year-over-year improvement of \$21, and \$11 lower than average due to savings in labor costs, that were only partially offset by facility leasing costs
- Trips delivered increased 35.4% and costs increased 3.8% when compared to the same time period FY23
- The ParaCruz Cost per Trip average of \$81 is based on the average actuals from FY19, FY22, and FY23 (excludes FY20/FY21 due to COVID impact)

# **Productivity KPI's**

# Total Ridership / Ridership per Hour (RPH)



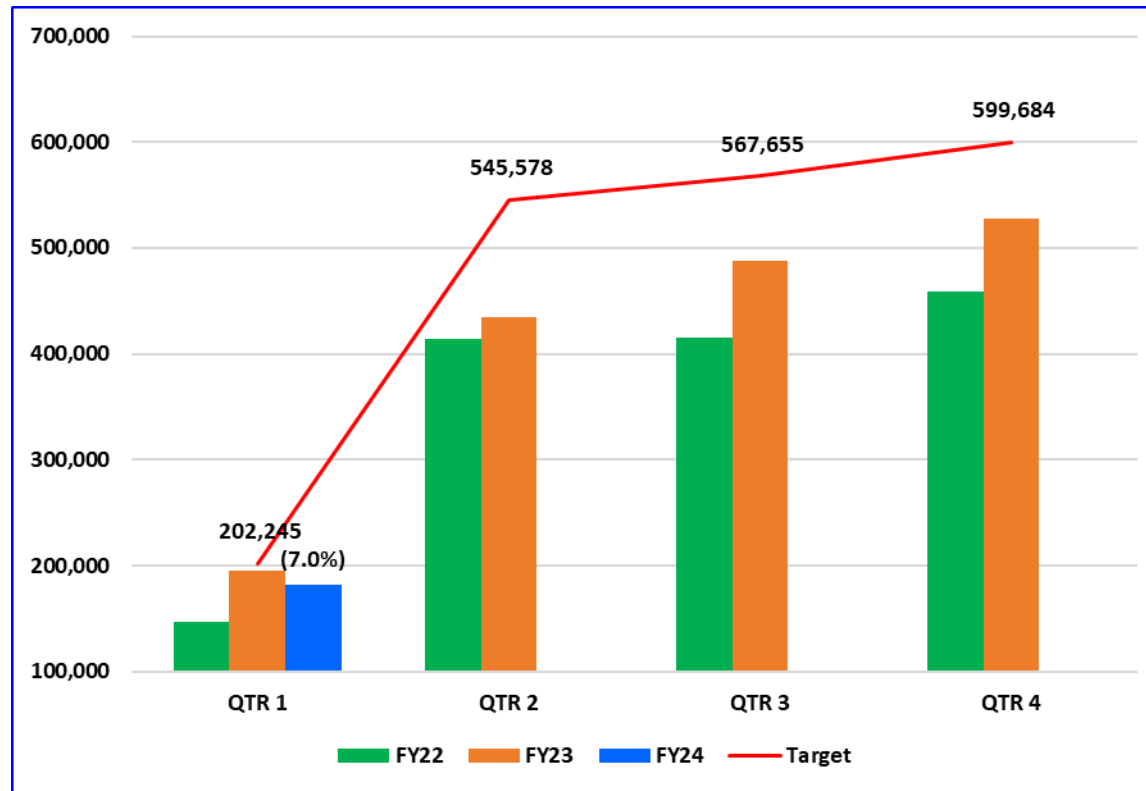
- A 0.1% decrease in ridership in local, non-student ridership service
- A 1.2% increase in Student ridership
- A 5.0% decrease in Highway 17 ridership
- The Quarterly Ridership Target is based on the average quarterly actuals from FY19, FY22, and FY23 (excludes FY20/FY21 due to COVID impact)



- UCSC ridership decreased 7.0% over Q1 of FY23
- Cabrillo ridership increased 85.1%
- The Quarterly RPH Target is based on the average quarterly actuals from FY19, FY22, and FY23 (excludes FY20/FY21 due to COVID impact)

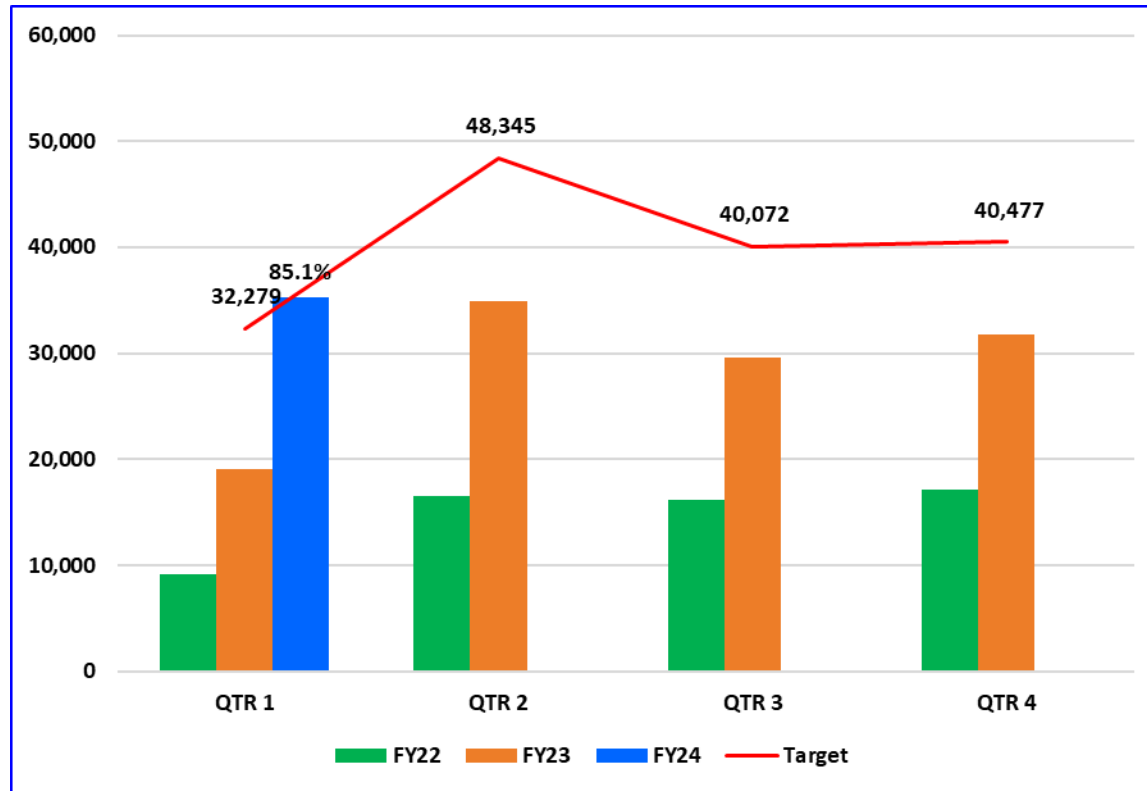


# UCSC Ridership



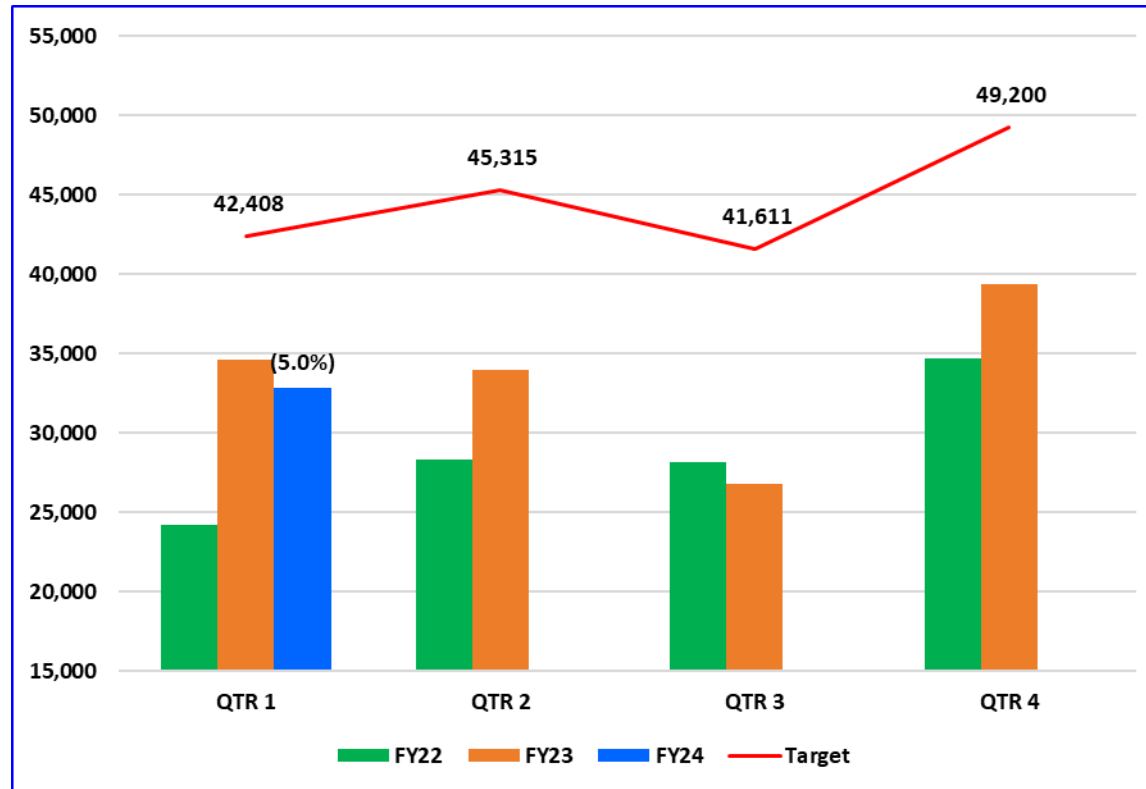
- Q4 Ridership decreased 7.0% due to five fewer days of instruction this quarter. However, average daily UCSC ridership was 29.6% higher for the two days of instruction this quarter.
- The Quarterly Ridership Target is based on the average quarterly actuals from FY19, FY22, and FY23 (excludes FY20/FY21 due to COVID impact)

# Cabrillo College Ridership



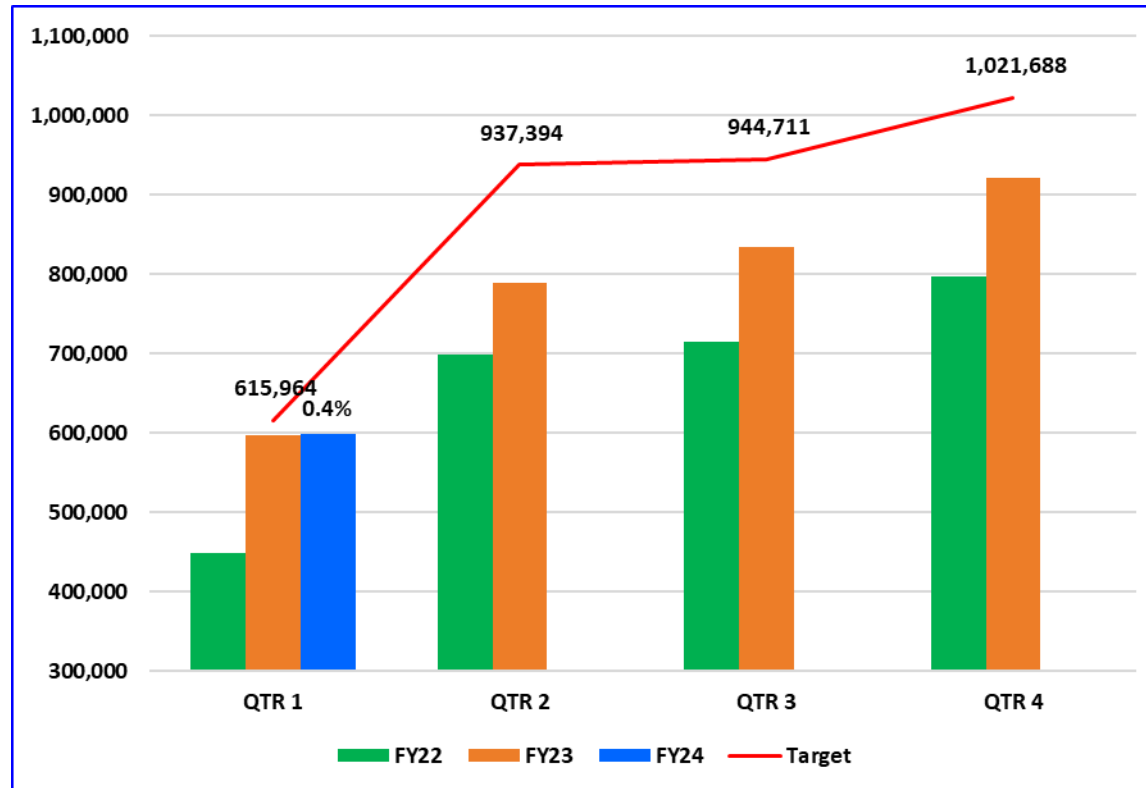
- Q4 Ridership increased 85.1% due to 7.9% increase in total student enrollment. There was a 9.1% increase in full-time student enrollment and a 7.3% increase in part-time enrollment.
- The Quarterly Ridership Target is based on the average quarterly actuals from FY18, FY19, FY22 (excludes FY20/FY21 due to COVID impact)

# Highway 17 Ridership



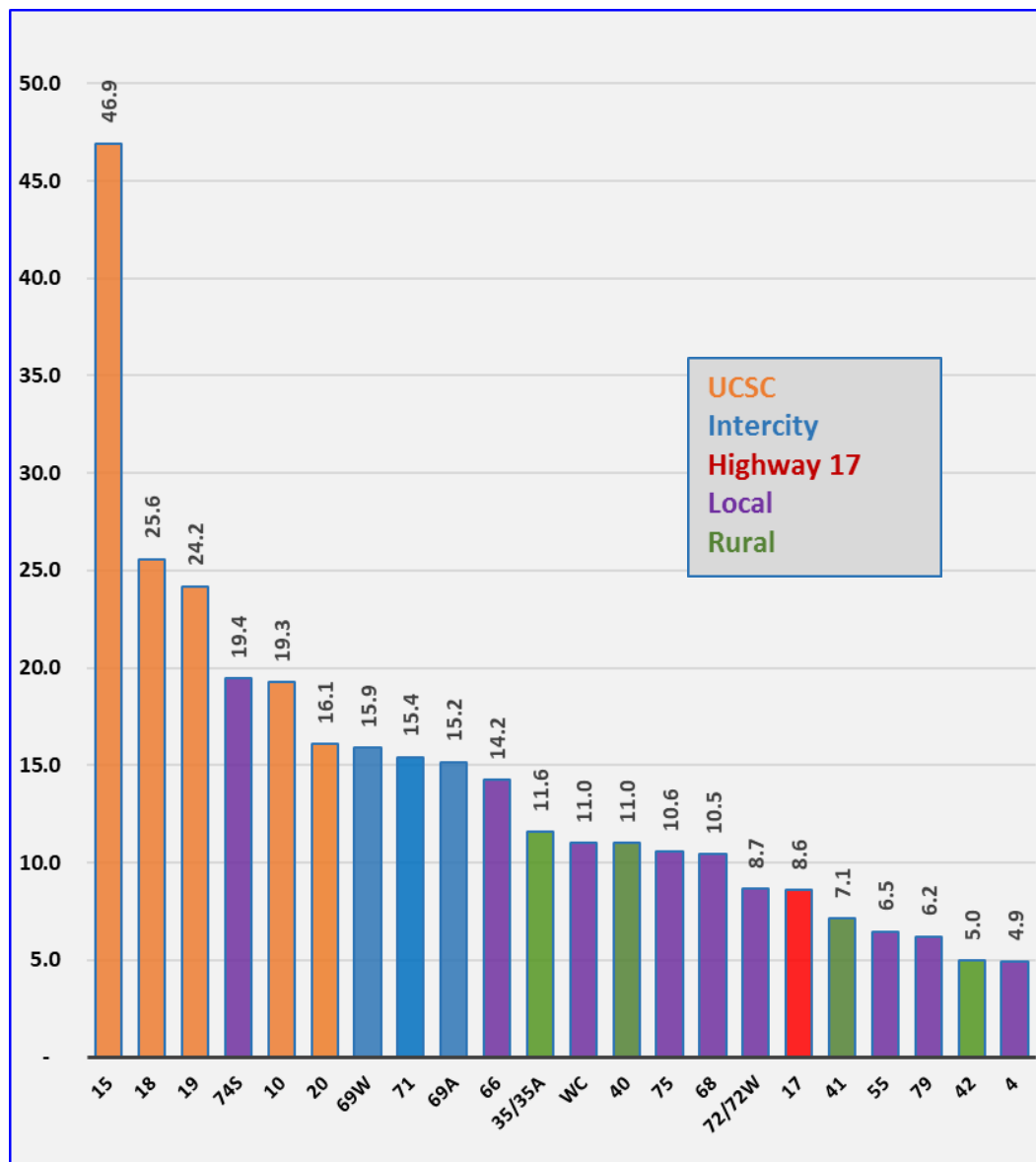
- Q4 Ridership decreased 5.0% primarily due to a 7.6% decrease in average weekday boardings. Average weekend boardings actually increased 3.1%. The decline in boardings on weekdays indicates that Hwy 17 riders commuting to work and school are taking less trips on the Highway 17 service.
- The Quarterly Ridership Target is based on the average quarterly actuals from FY19, FY22, and FY23 (excludes FY20/FY21 due to COVID impact)

# Local Ridership



- Q1 Ridership increased 0.1% due to a 7.0% increase in scheduled weekend service with additional service operated on routes 18, 19, and 35
- The Quarterly Ridership Target is based on the average quarterly actuals from FY19, FY22, and FY23 (excludes FY20/FY21 due to COVID impact)

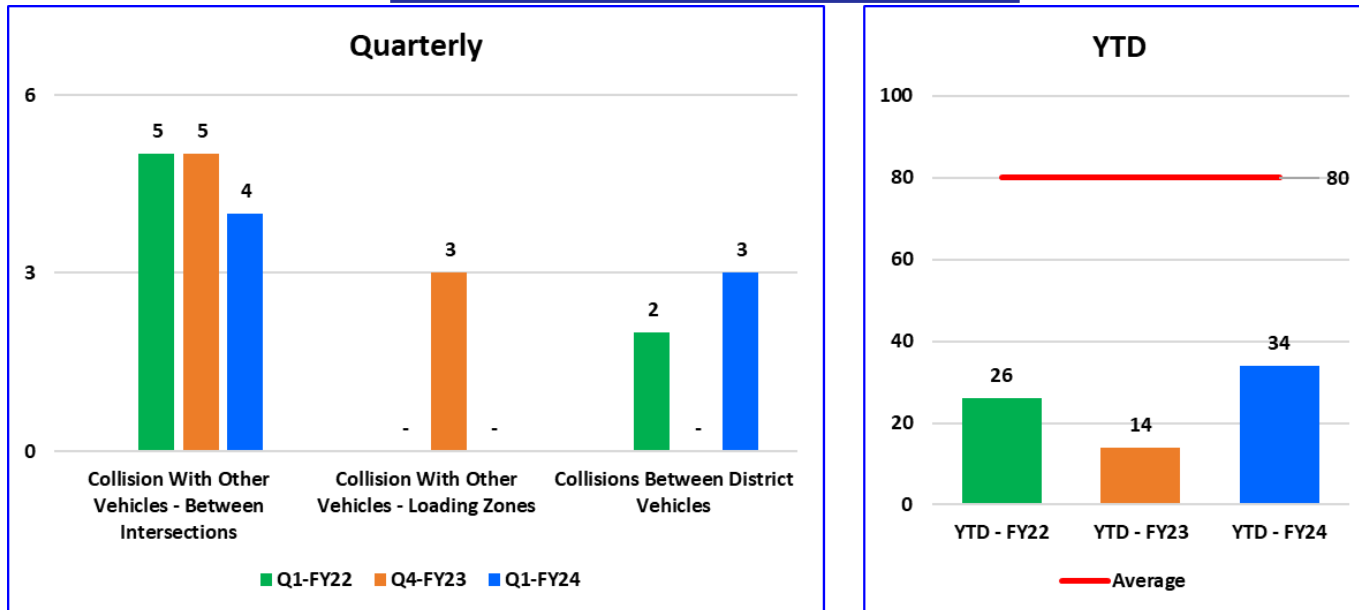
# YTD FY23 Passengers/Service Hours by Route



- Total Passengers/Service Hours are 68.3 for Q1 FY24
- Combined UCSC Passengers/Service Hours were 23.1
- Combined Intercity Passengers/Service Hours were 15.5
- Combined Local Passengers/Service Hours were 10.2
- Combined Rural Passengers/Service Hours were 10.9
- Combined Highway 17 Passengers/Service Hours were 8.6

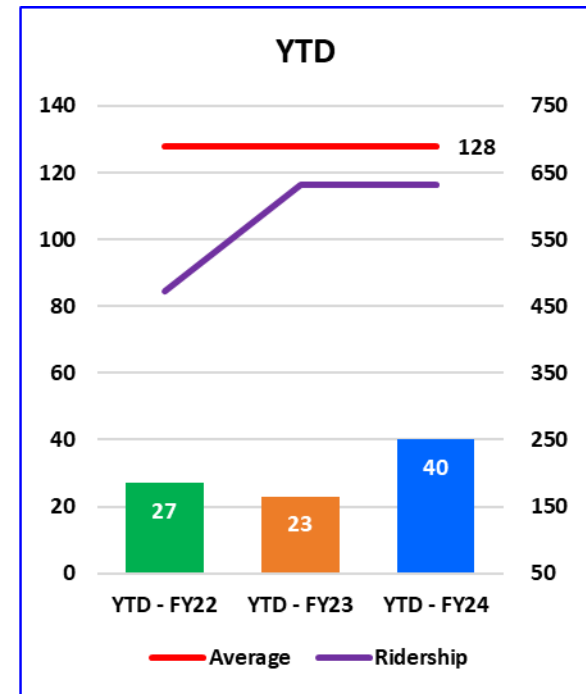
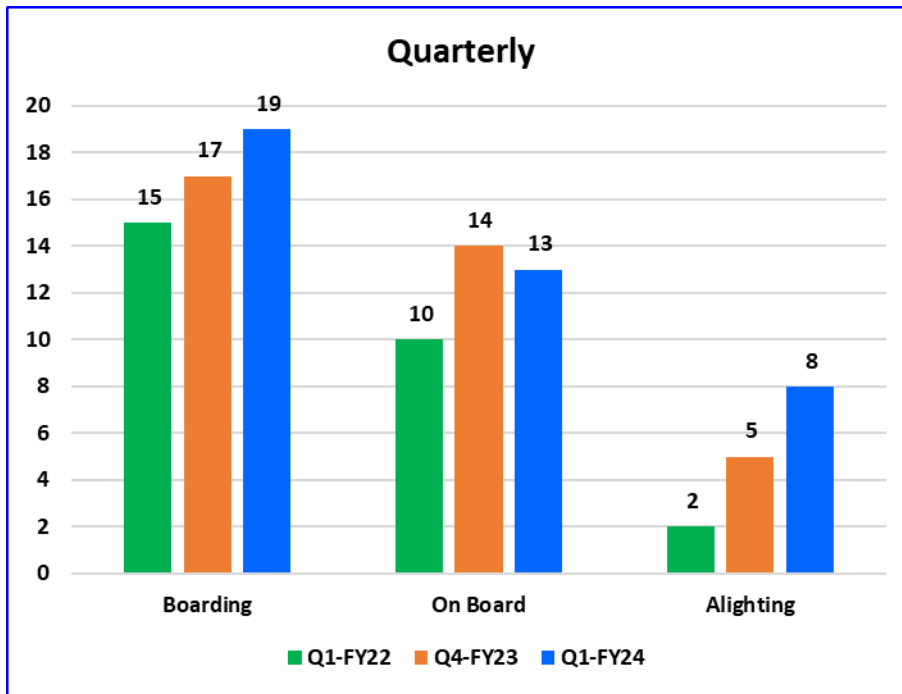
# **Risk Management & Safety KPI's**

# Traffic Accidents



- Total Traffic Accidents in Q1 FY24 decreased by 8 (35%) over Q4 FY23 and increased by 11 (55%) from a year ago, Q1 FY23
- Collisions with Other Vehicles (between intersections) for Q1 FY24 decreased by 1 (20%) over Q4 FY23 and increased by 1 (20%) from a year ago, Q1 FY23
- Collisions with Other Vehicles (loading zone) for Q1 FY24 decreased by 3 (100%) over Q4 FY23 and is flat to Q4 FY23
- Other Collisions for Q1 FY24 decreased by 3 (100%) over Q4 FY23 and increased by 1 (50%) from a year ago, Q1 FY23
- Metro average of 80 is based on pre-pandemic 3-year average (FY19, FY22, FY23)
- Quarterly categories are only reported if any reporting/presented quarter has 3 or more incidents.
- The YTD total is **all** incidents (Collisions between/at intersections, fixed object and rear end collisions, along with collisions between District vehicles)

# Passenger Incidents

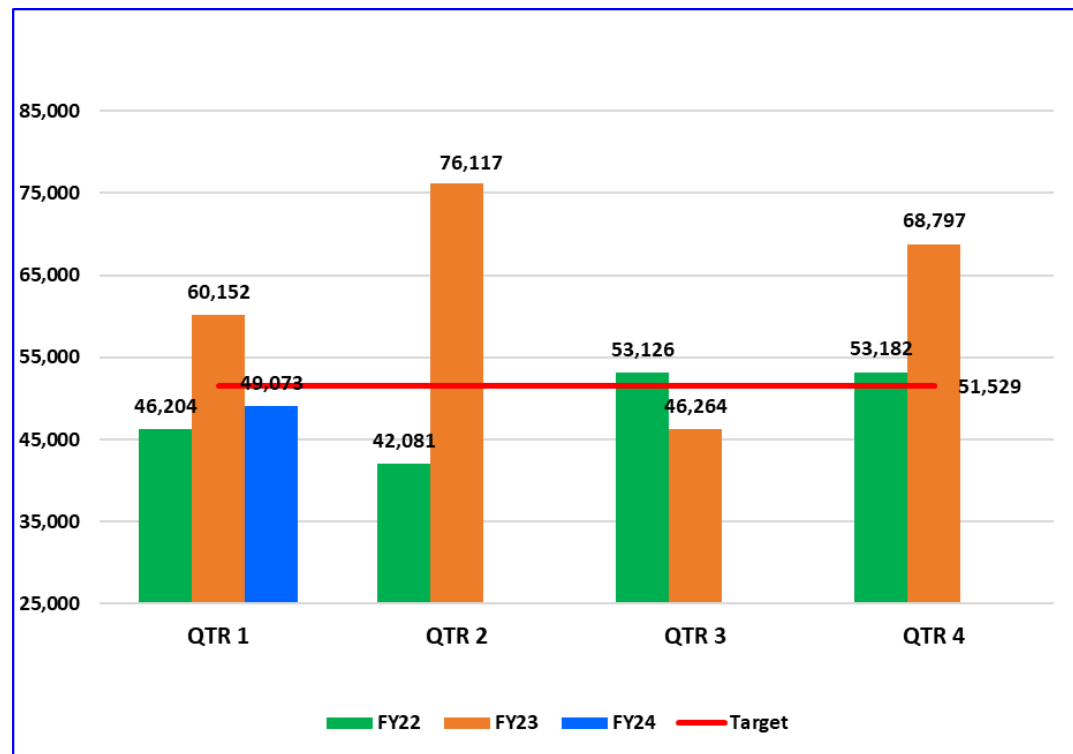


- Safety, Fleet Maintenance, and Information Technology departments are collaborating to identify further methods to reduce the number of incidents.
- Most boarding incidents occur when the passengers are using cell phones, not paying attention, or sleeping.
- YTD Ridership numbers are 472,494, 631,351, and 631,820 respectively for FY22, FY23, and FY24
- Metro Average of 128 is based on pre-pandemic 3-year average (FY19, FY22, FY23)



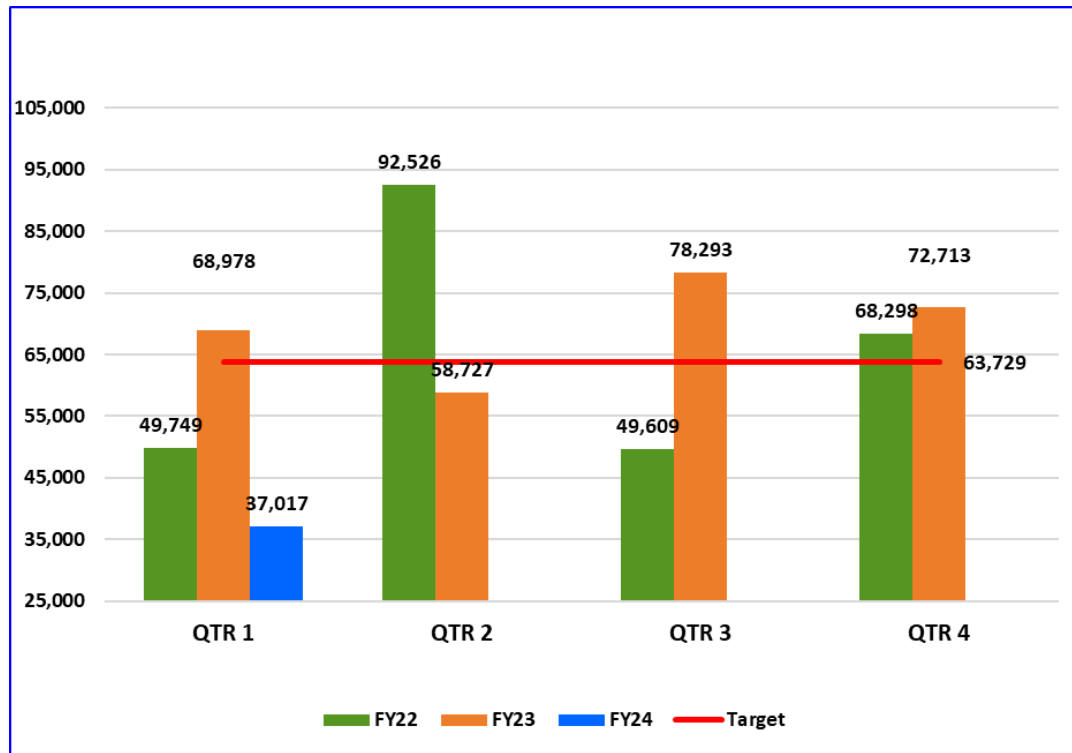
# **Reliability KPI's**

## Mean Miles Between Chargeable Road Calls – Fixed Route (Local)



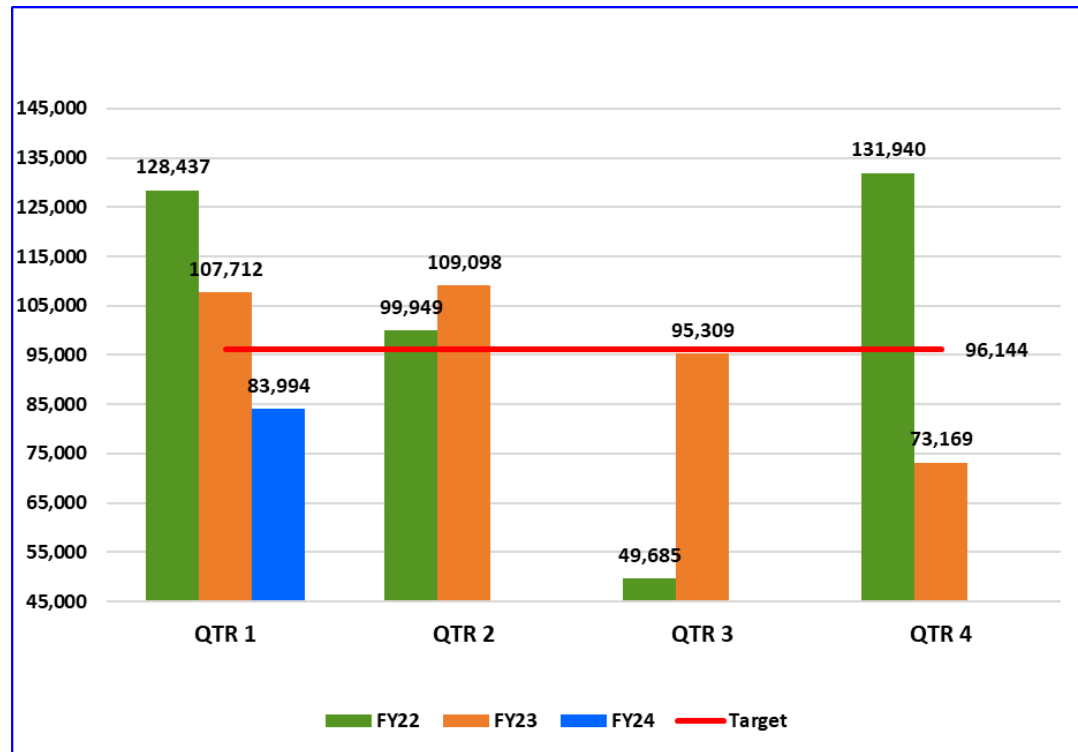
- Q1 FY24 mileage between calls decreased by 11,079 and road calls decreased by 5 compared to the same time period in FY23
- Chargeable road calls in Q1 FY24 are 12 in July, 11 in August, 12 in September
- The current target of 51,529 and is based off a 3-year monthly average from FY21-FY23, times three to get to a quarterly number.

# Mean Miles Between Chargeable Road Calls – Highway 17



- Q1 FY24 mileage between calls decreased by 31,961 and road calls decreased by 3 compared to the same time period in FY23
- Chargeable road calls in Q1 FY24 are 4 in July, 2 in August, and 4 in September
- The current target of 63,729 and is based off a 3-year monthly average from FY21-FY23, times three to get to a quarterly number.

# Mean Miles Between Chargeable Road Calls – ParaCruz

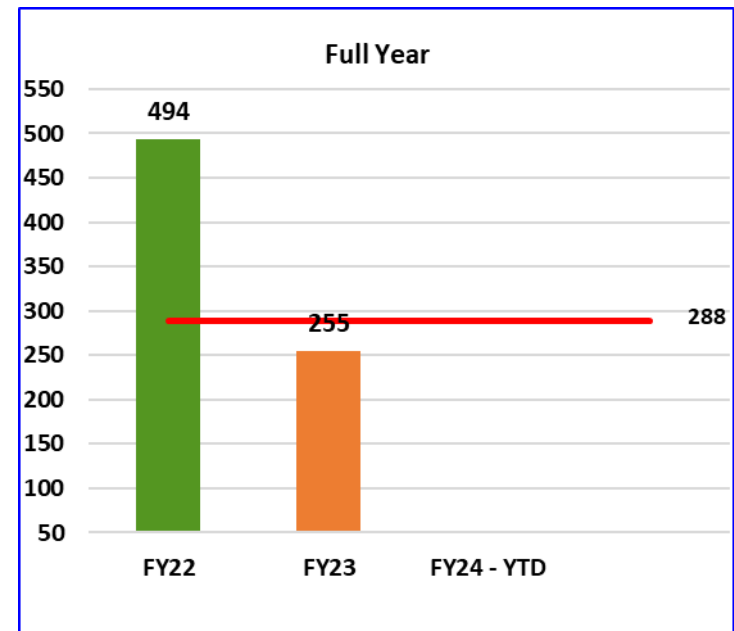


- Q1 FY24 mileage between calls decreased by 23,718 and road calls were 4, with no variance when compared to the same time period in FY23
- In Q1 FY24 chargeable road calls were zero in July, 1 in August, and 3 in September
- The current target of 96,144 and is based off a 3-year monthly average from FY21-FY23, times three to get to a quarterly number.

# **Dependability KPI's**

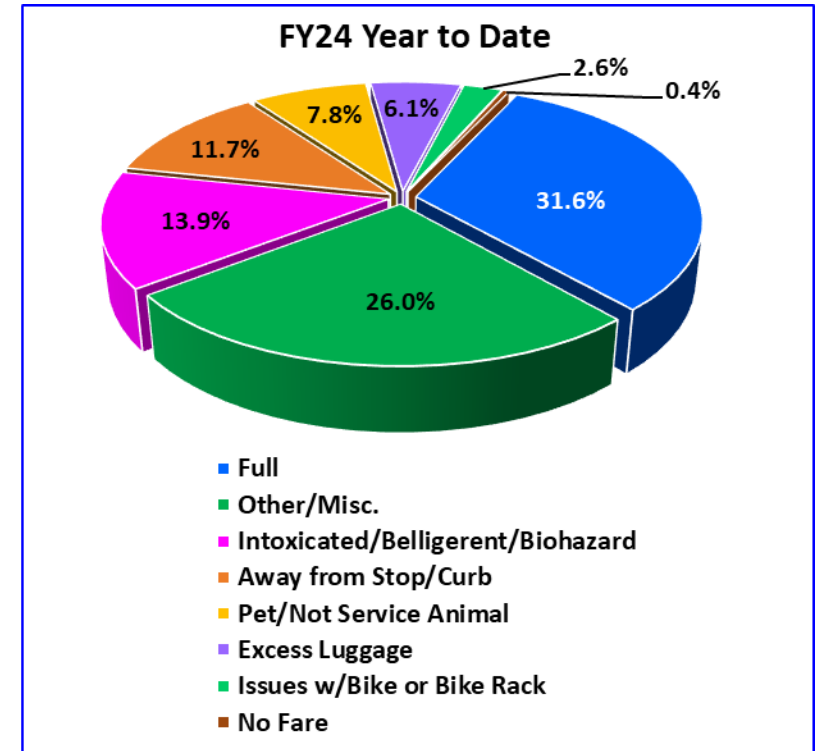
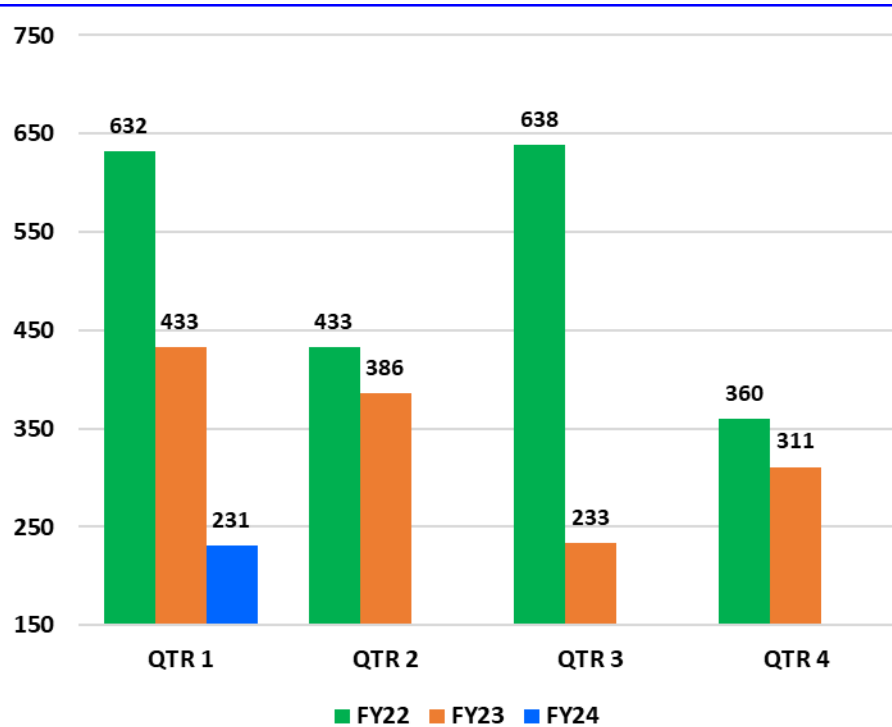
## Cancelled Trips by Cause & Region

There were no cancelled trips in Q1  
FY24



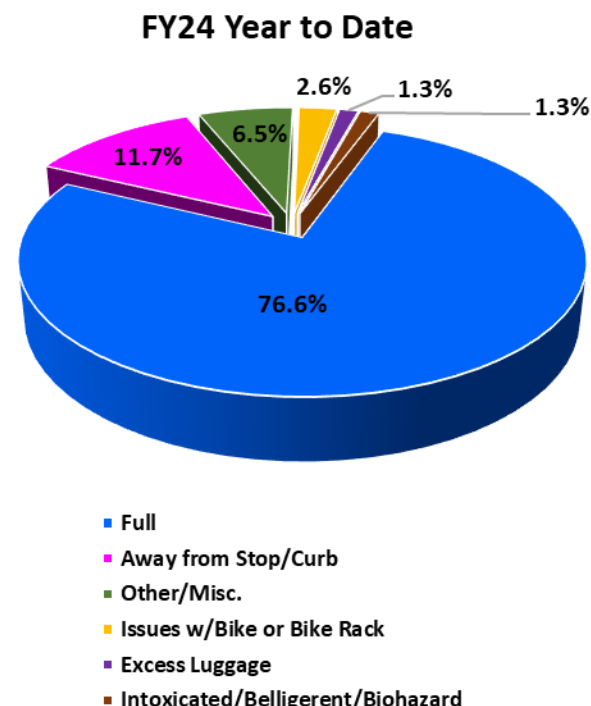
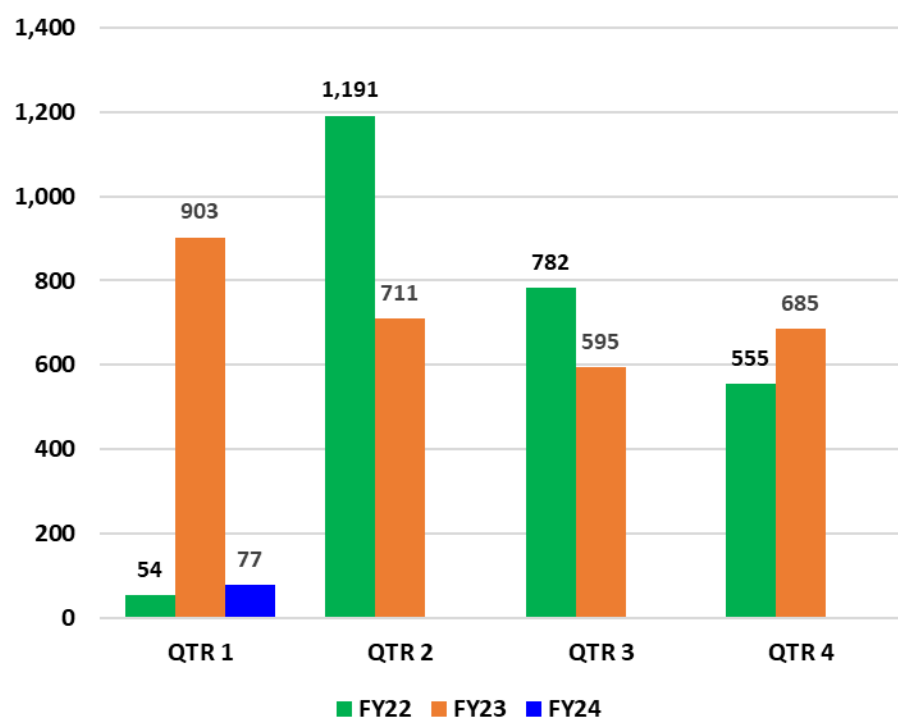
Full year average of 288 is based on pre-pandemic 3-year average (FY19, FY22, FY23)

# Pass-Ups by Quarter/Reason – Fixed Route



- In Q1 FY24, total pass-ups were 231, which is 202 (46.7%) lower when compared to Q1 FY23
- July had a decrease of 54 pass-ups (37.5%), August had a decrease of 60 (44.1%), and September had a decrease of 88 (57.5%) when compared to the same time period as FY23
- 31.6% of Year-to-Date total pass-ups are caused by full bus capacity, followed by 26.0% of Other, which covers a wide range of issues (such as Surfboards, No Shoes, Smoking/Vaping, and Hygiene to name a few), and 13.9% due to Intoxicated/Belligerent/Biohazard

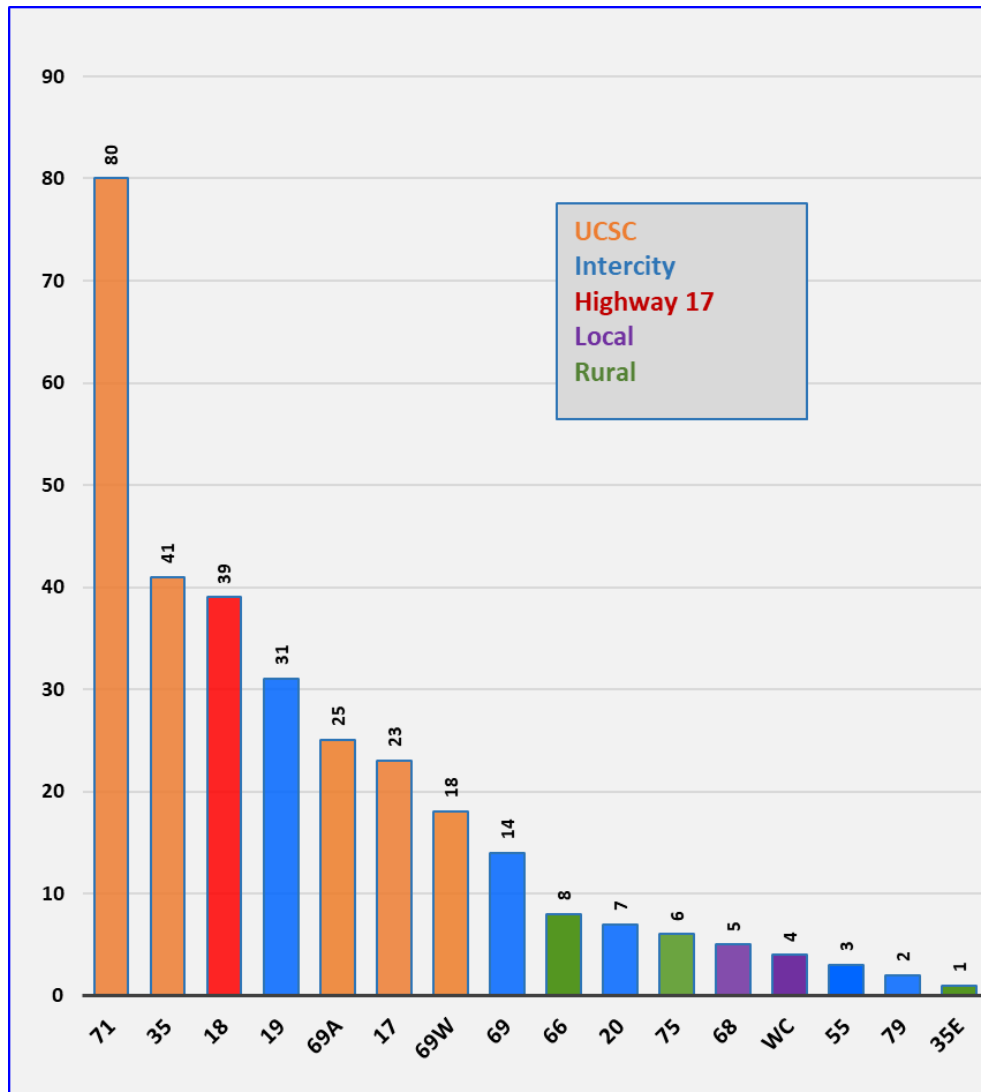
# Pass-Ups by Quarter/Reason - UCSC



- In Q1 FY24, total pass-ups were 77, which is 826 (91.5%) lower when compared to Q1 FY23
- July had an increase of 1 pass-ups (11.1%), August had a decrease of 65 (98.5%), and September had a decrease of 762 (92.0%) when compared to the same time period as FY23
- 76.6% of Year-to-Date total pass-ups are caused by full bus capacity, followed by 11.7% caused by riders being Away from Stop/Curb



# YTD FY24 Pass-Ups by Route



- YTD Pass-ups total 308
- UCSC Routes comprised 77 (25.0%), of which 76.6% were due to full bus capacity
- Highway 17 Routes comprised 23 (7.5%), of which 34.8% were due to Intoxicated/Biohazard or various misc. issues
- Local Routes comprised 29 (9.4%), 44.8% were due to Intoxicated/Biohazard
- Intercity Routes comprised 137 (44.5%), of which 32.1% were due to various misc. issues
- Rural Routes comprised 42 (13.6%), of which 35.7% were due to full bus capacity

**Questions ?**

# KPI Metric Descriptions & Importance

Metric	Description & Importance
Financial Performance	<p>The Farebox Recovery Ratio represents the passenger fares (Fixed Route and Commuter) coverage of Metro's agency costs; this provides insight to the amount of non-passenger revenue (subsidy) needed to cover costs. Additionally, it allows the agency to compare cost-effectiveness within its own service.</p> <p>Fixed Route and Commuter Cost per Revenue Service Hour (RSH) along with the ParaCruz Cost per Trip depict the cost per hour of service/trip. By effectively tracking and minimizing costs, this measurement ensures efficient delivery of transit services.</p> <p>Data presented is by Quarter, for the current and past two fiscal years.</p>
Productivity	<p>Total Ridership and Ridership per hour are measures of productivity. The metrics depict seasonal fluctuations in ridership related to holidays, school terms, and other changes.</p> <p>Student ridership, historically a large portion of METRO's total ridership, shows changes in student enrollment and seasonal trends can be seen year over year.</p> <p>Highway 17 demonstrates METRO's commuter ridership, connecting Santa Cruz to San Jose.</p> <p>Local Ridership excludes student and commuter routes and reflects all other routes within the county.</p> <p>Passengers per Revenue Service Hour (RSH) depicts the productivity of each route. This ratio brings the true productivity of each route to scale and can stimulate discussions about frequency of service in urban and semi-urban areas of the of the county versus geographic coverage.</p> <p>Data presented is by Quarter, for the current and past two fiscal years.</p>

# KPI Metric Descriptions & Importance, con't

Metric	Description & Importance
Risk Management & Safety	<p>Traffic Accidents are broken down into different categories: Collisions between intersections, at the intersection, with fixed objects, with other district vehicles</p> <p>Passenger Incidents happen with METRO passengers either while boarding a bus, on board a bus, or alighting (descending) a bus.</p> <p>Data presented is by Quarter, for the current quarter, previous quarter, and the current quarter for the last fiscal year.</p> <p>Quarterly categories are only reported if any reporting/presented quarter has 3 or more incidents.</p> <p>The YTD total is <b><u>all</u></b> incidents (Collisions between/at intersections, fixed object and rear end collisions, along with collisions between District vehicles)</p>
Reliability	<p>Any mechanical failure that impedes the vehicle from starting or completing a scheduled revenue trip because actual movement is limited, or there are safety concerns, are used to calculate the Mean Miles Between Chargeable Road Call.</p> <p>The metric is calculated using the number of miles for the month divided by the number of chargeable road calls for each service type (Fixed Route, Commuter, and ParaCruz).</p> <p>Data presented is by Quarter, for the current and past two fiscal years.</p>

## KPI Metric Descriptions & Importance, con't

Metric	Description & Importance
Dependability	<p>Cancelled Trips are presented by Region and Cause for the current quarter only and YTD for the current year, and full year for the previous two fiscal years.</p> <p>Pass-Ups occur when a bus operator must leave behind a passenger for a variety of reasons: No Fare, Exceeds Capacity Load (Full Bus), Intoxicated/Belligerent/Biohazard, and All Other.</p> <p>Pass-Ups data are presented by Quarter, for the current and past two fiscal years for both Fixed Route and UCSC along with a YTD presentation of Routes with 10 or more Pass-Ups</p>

## Historical Metrics

Metric	FY19	FY20	FY21	FY22	FY23	YTD FY24
Farebox Recovery	22.7%	24.1%	11.2%	16.6%	18.6%	19.4%
Fixed Route/Commuter Cost/RSB	211	270	298	271	247	275
ParaCruz Cost/Trip	72	129	181	91	69	70
Monthly Mean Miles Between Chargeable Road Calls - Fixed Route	13,610	13,216	14,368	16,216	20,944	4,089
Monthly Mean Miles Between Chargeable Road Calls - Highway 17	23,043	24,126	18,821	21,682	23,226	3,085
Monthly Mean Miles Between Chargeable Road Calls - ParaCruz	44,221	44,329	29,869	34,168	32,107	7,000
Average Age of Fleet - Fixed Route	13.8	12.6	12.9	12.8		
Average Age of Fleet - Highway 17	13.8	12.6	12.9	9.5		
Average Age of Fleet - ParaCruz	5.1	6.1	6.2	7.3		
Annual Road Miles - Fixed Route	2,443,157	2,139,917	1,999,474	2,325,531	2,358,618	571,128
Annual Road Miles - Highway 17	627,207	540,859	324,281	373,984	403,492	111,224
Annual Road Miles - ParaCruz	601,229	531,951	373,748	503,650	505,399	107,241