



KEY PERFORMANCE INDICATORS (KPI) REPORT

FOR 1st Quarter through September 30, 2024

Board of Directors

December 20, 2024

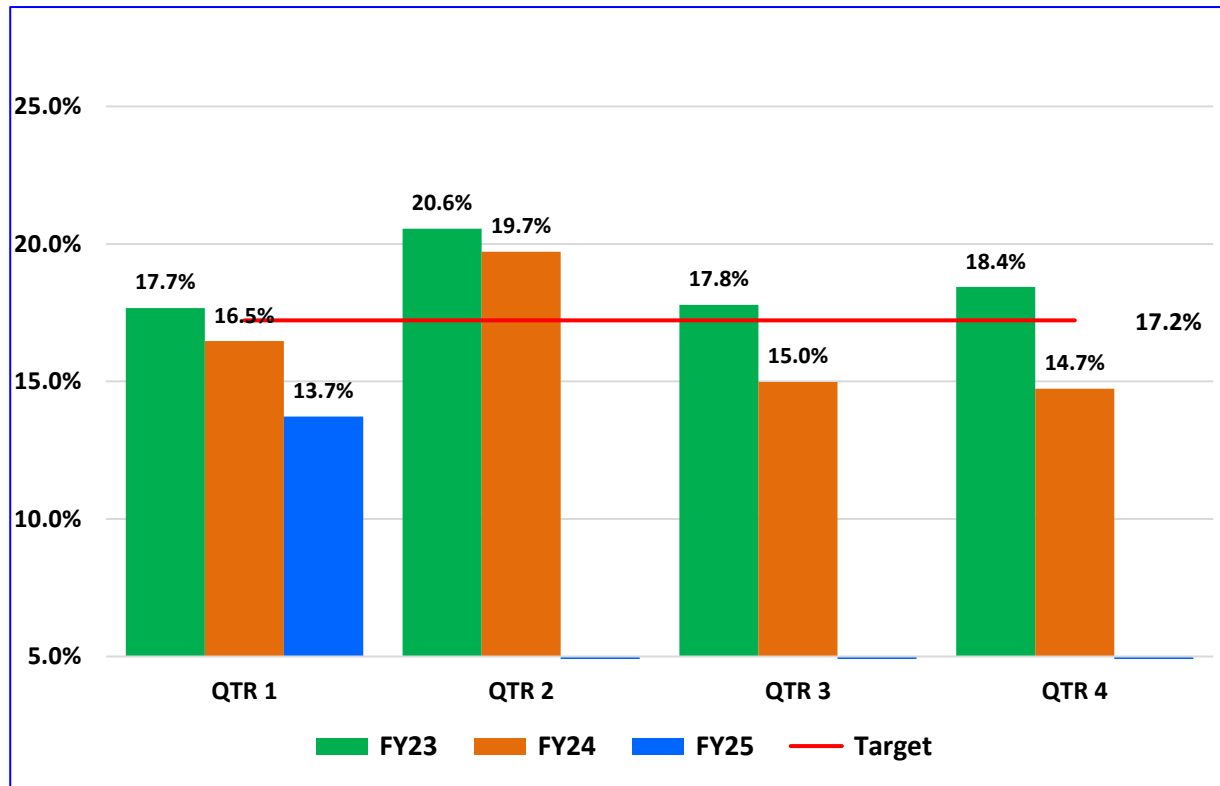
Chuck Farmer, Chief Financial Officer

Overview of Today's Presentation:

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

Financial Performance KPI's

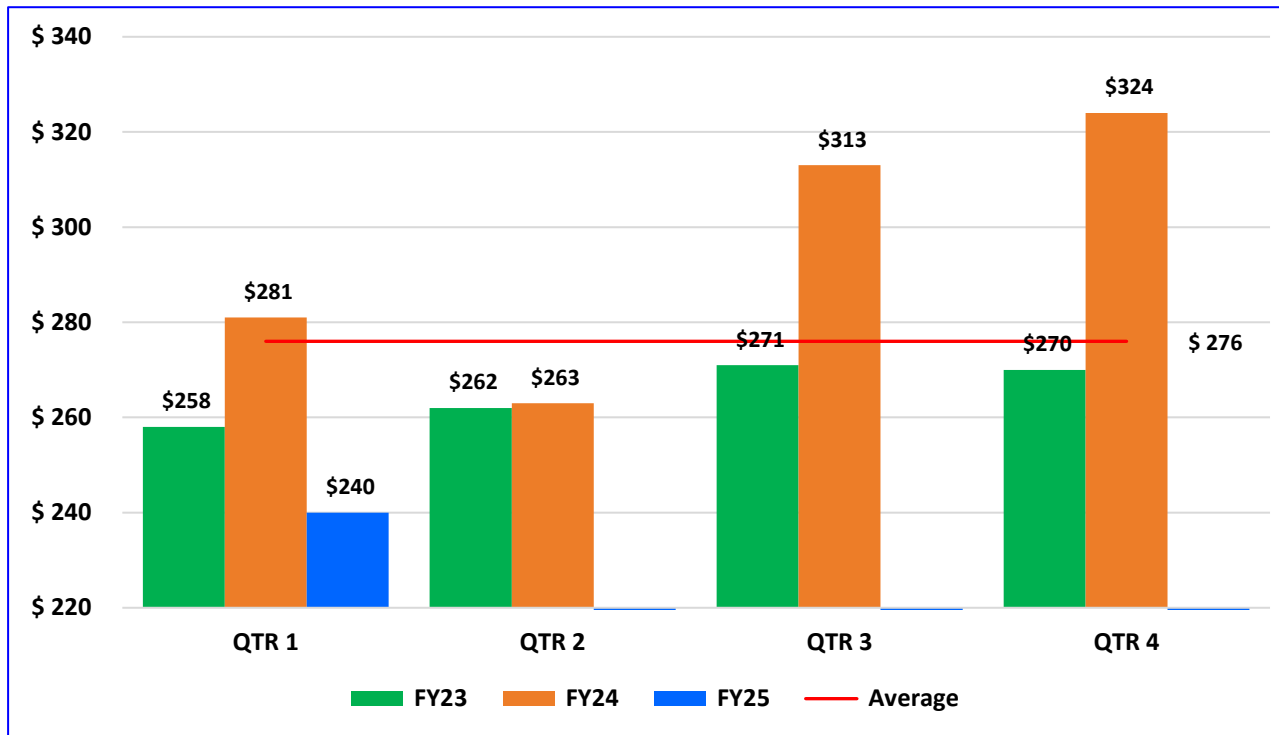
System Farebox Recovery:



- Q1 FY25 Farebox Recovery decline of 2.8% when compared to Q1 FY24 due to the increase in FTEs (Bus Operators) during the implementation of phase 1 and 2 of the Reimagine Metro resulted in higher cost and lower farebox recovery.

The Farebox Recovery Target of 17.2% is based on the average actuals from FY22, FY23 and FY24

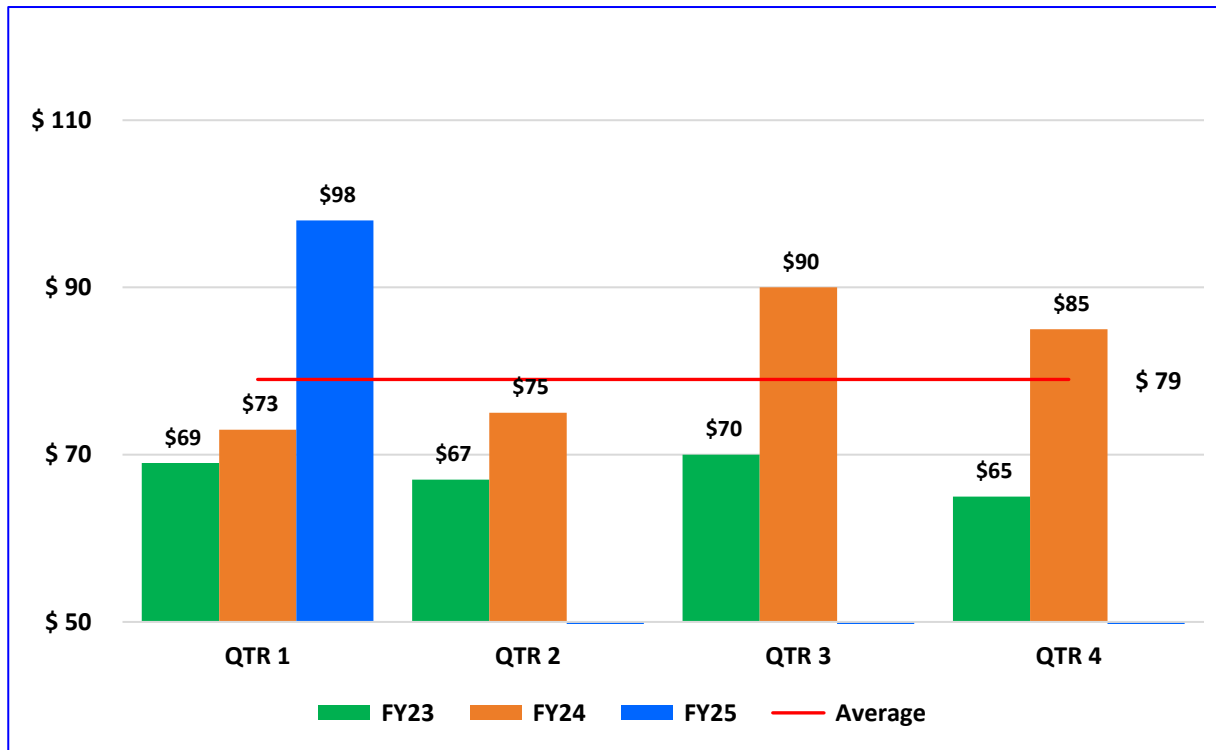
Fixed Route/Commuter Cost per RSH



- Q1 FY25 Cost per RSH is lower by \$41, over prior year Q1 FY24 due to an increase in service hours of 22,344 or 51.1%

The Fixed Route/Commuter cost per RSH average of \$276 is based on the average actuals from FY22, FY23, and FY24

ParaCruz Cost per Trip

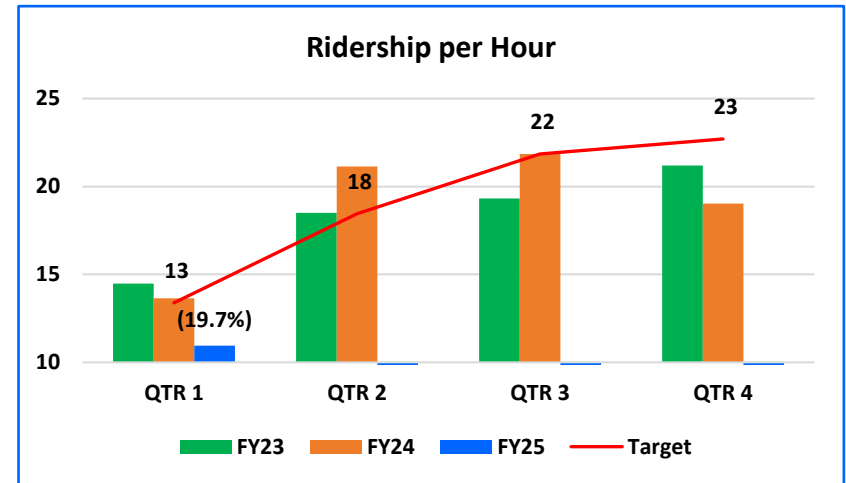
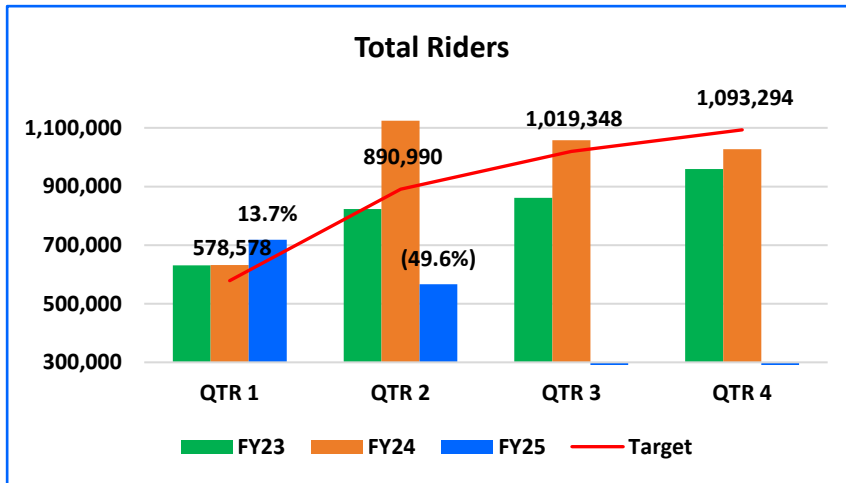


- Q1 FY25 Cost per Trip increased \$25 over prior year due to a decline in trips of 2,942, or 15.6%, primarily due to outsourcing the eligibility process which has resulted in fewer qualified applicants, along with an increase in costs of 13.2% primarily due to 6 additional FTEs (Van Operators) compared to the same period last year.

The ParaCruz Cost per Trip average of \$79 is based on the average actuals from FY22, FY23, and FY24

Productivity KPI's

Total Ridership / Ridership per Hour (RPH)



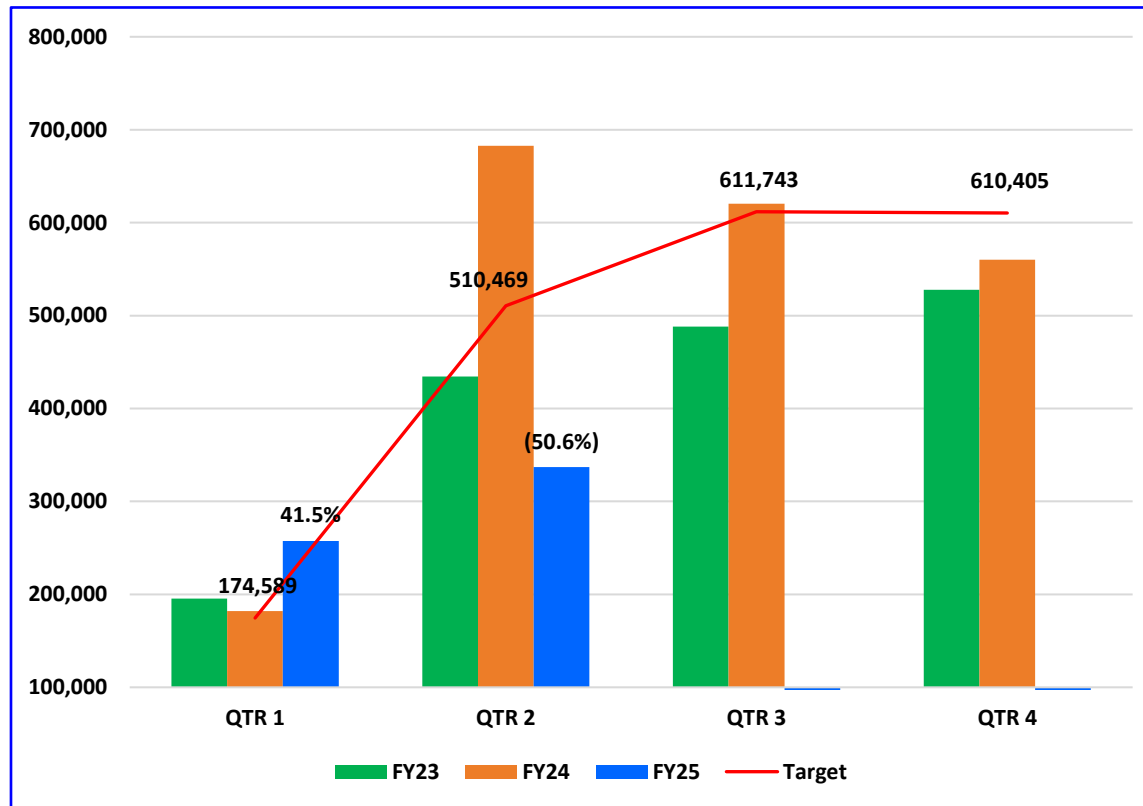
Ridership	Q1-FY24	Q1-FY25	Change	YoY Change
Local, Non-Student Ridership	337,530	261,066	(76,464)	(22.7%)
Student, includes UCSC, Cabrillo & K-12	261,413	421,843	160,430	61.4%
Highway 17	32,945	35,648	2,703	8.2%

The Quarterly Ridership Target is based on the average quarterly actuals from FY22, FY23 and FY24

Ridership	Q1-FY24	Q1-FY25	Change	YoY Change
UCSC	181,982	257,512	75,530	41.5%
Cabrillo	35,251	53,076	17,825	50.6%
Youth	44,180	111,255	67,075	151.8%

The Quarterly RPH Target is based on the average quarterly actuals from FY22, FY23, and FY24

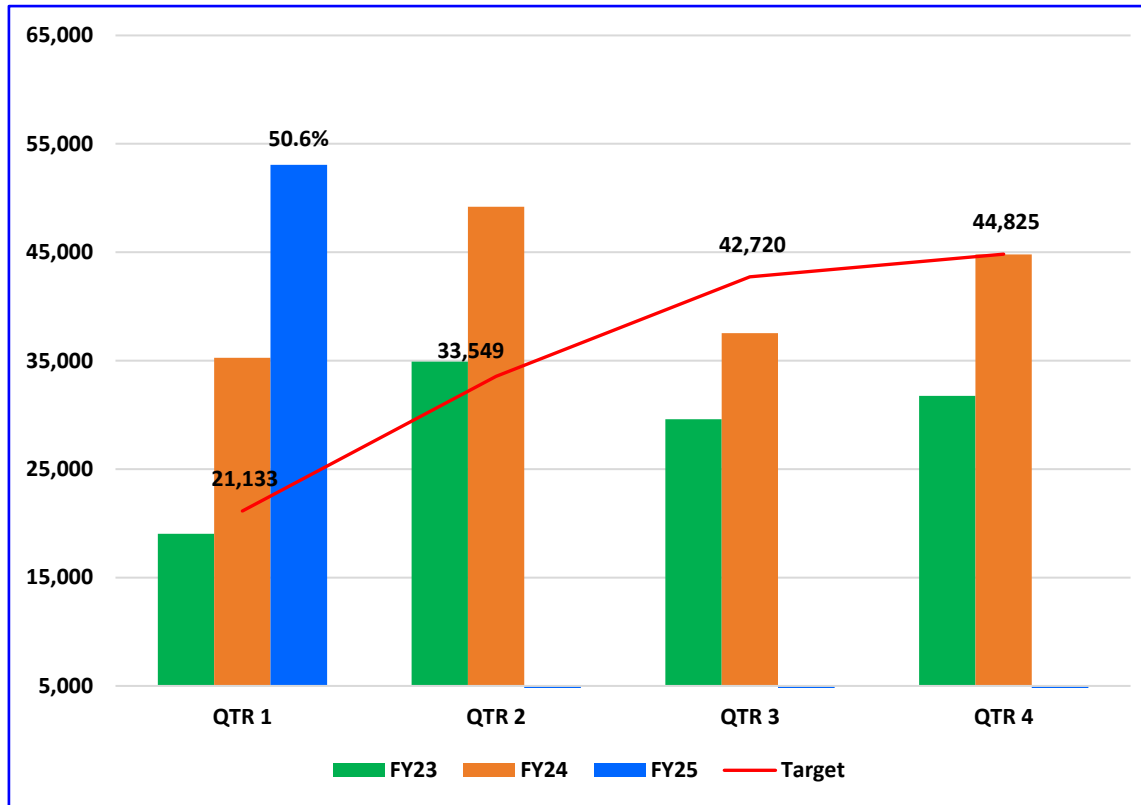
UCSC Ridership



- Q1 Ridership increased 75,530, or 41.5%, due to 61.5% additional vehicle revenue hours operated on UCSC routes and increased carrying capacity on these routes by operating more articulated buses (60' buses). The difference in capacity from a 40' vs a 60' is about 12 passengers.

The Quarterly Ridership Target is based on the average quarterly actuals from FY22, FY23, and FY24

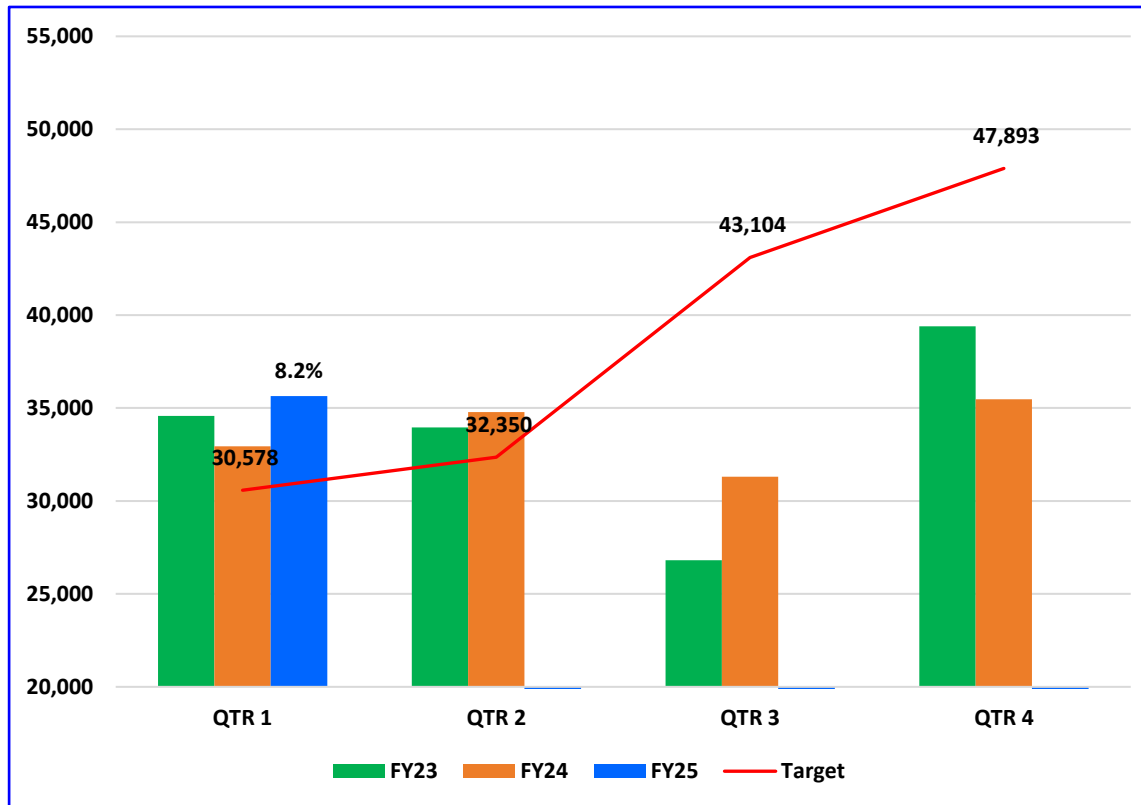
Cabrillo College Ridership



- Q1 Ridership increased 17,825, or 50.6% due to fall student enrollment increase of 10%.

The Quarterly Ridership Target is based on the average quarterly actuals from FY22, FY23, and FY24

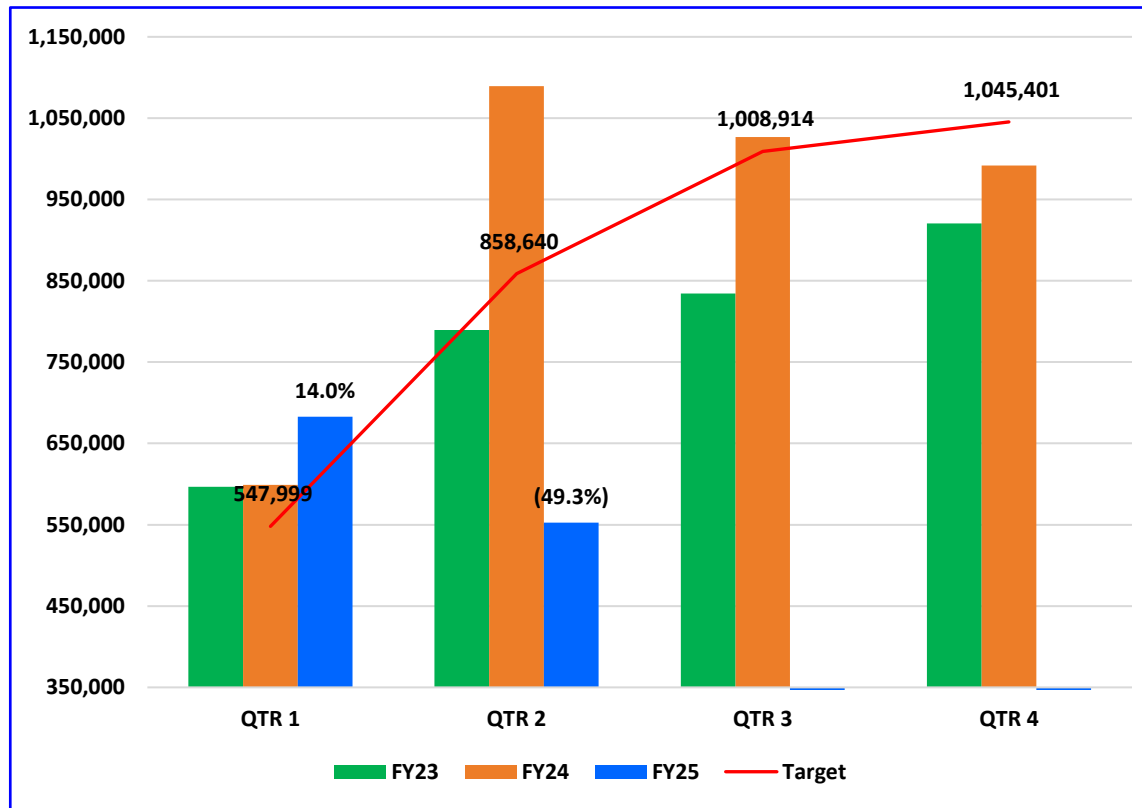
Highway 17 Ridership



- Q1 Ridership increased 8.2% compared to Q1 FY24. METRO operated 41.4% additional vehicle revenue hours in Q1 of FY25.

The Quarterly Ridership Target is based on the average quarterly actuals from FY22, FY23, and FY24

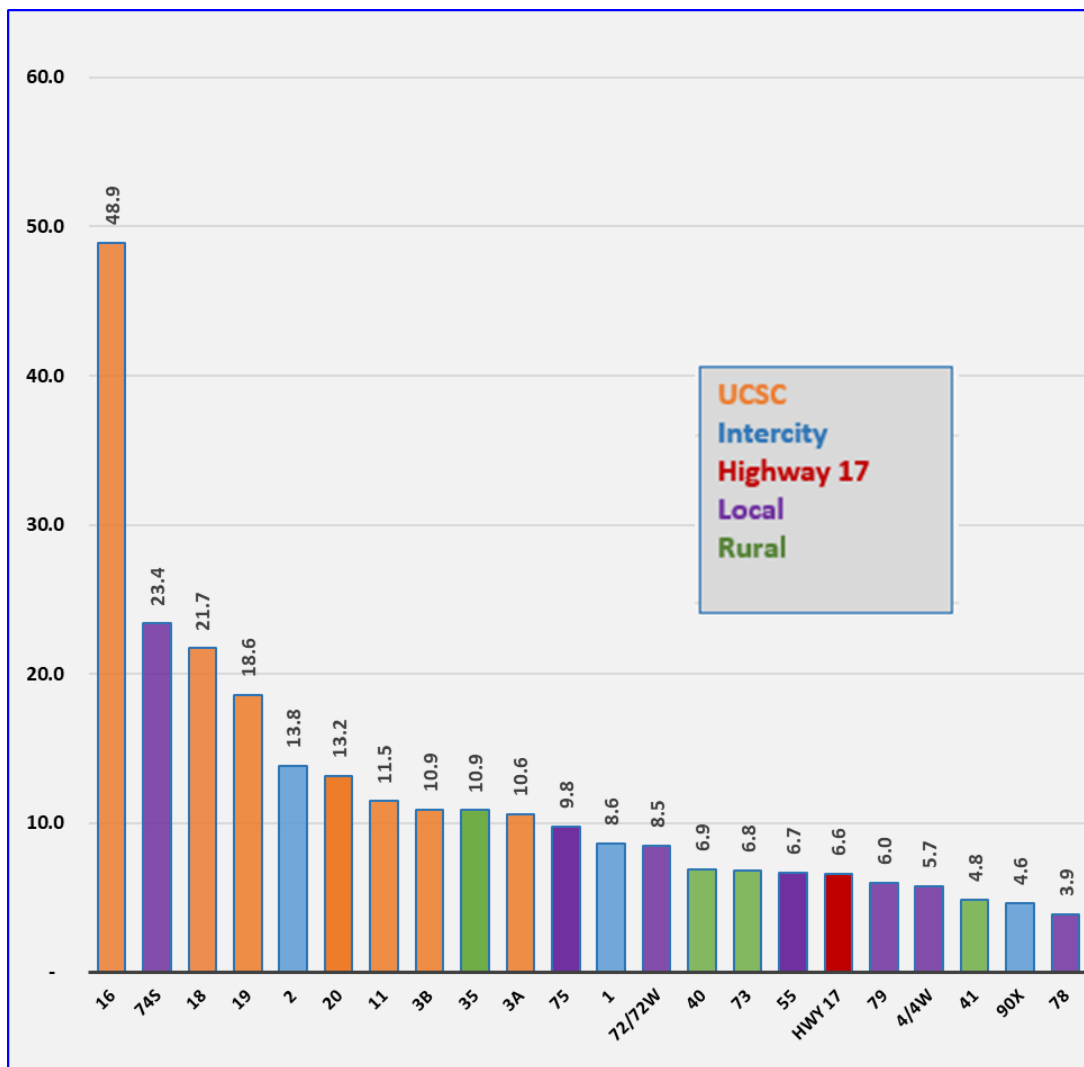
Local Ridership



- Q1 Ridership increased 83,966, or 14.0% over prior year Q1, due to an increase in student ridership increase of 61.4%.
 - . UCSC – 41.5% increase
 - . Cabrillo – 50.6% increase
 - . K-12 – 151.8% increase

The Quarterly Ridership Target is based on the average quarterly actuals from FY22, FY23, and FY24

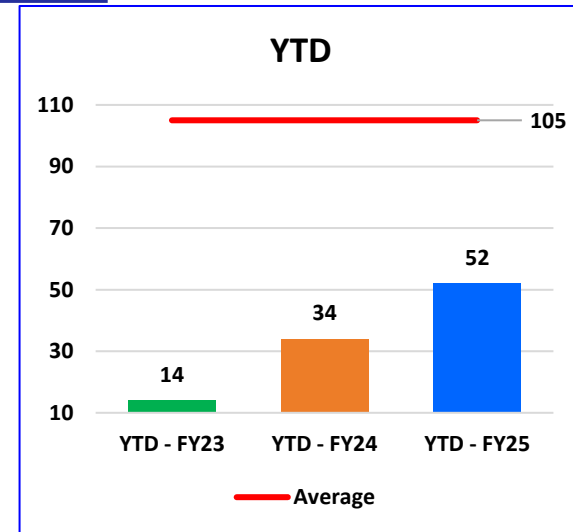
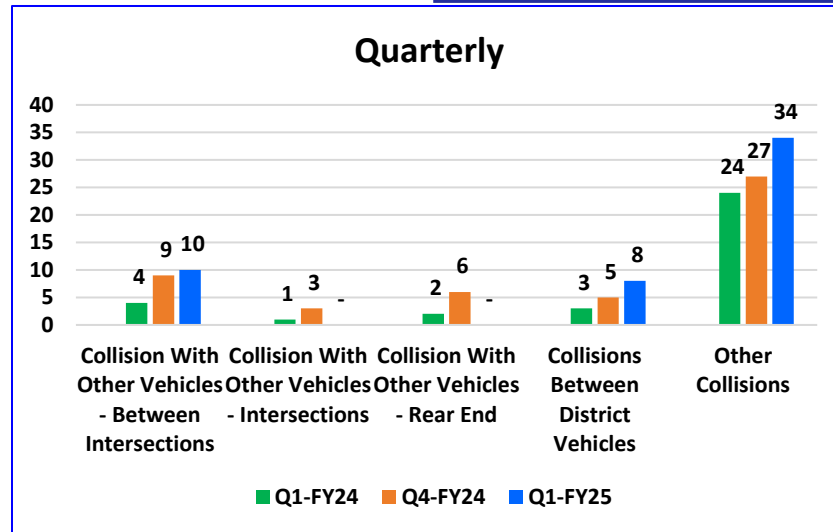
YTD FY25 Passengers/Service Hours by Route



- Total Passengers/Service Hours were 10.9
- Combined UCSC Passengers/Service Hours were 16.5
- Combined Intercity Passengers/Service Hours were 9.6
- Combined Rural Passengers/Service Hours were 9.1
- Combined Local Passengers/Service Hours were 7.1
- Combined Highway 17 Passengers/Service Hours were 6.6

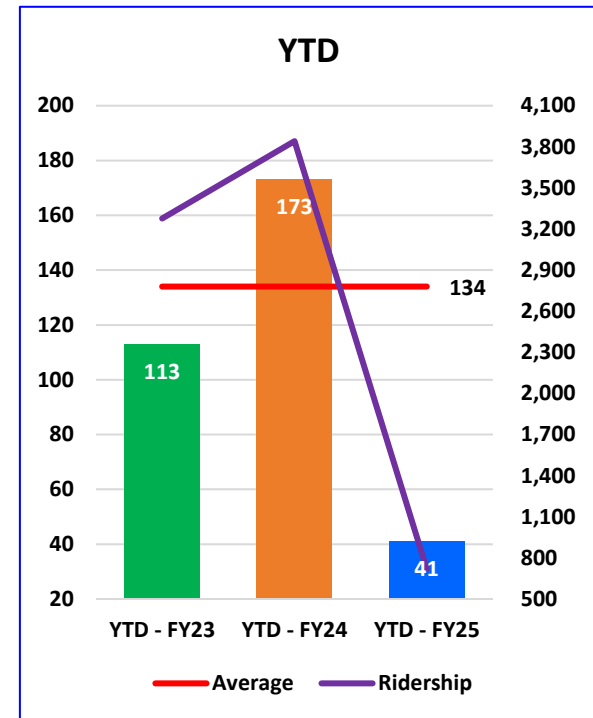
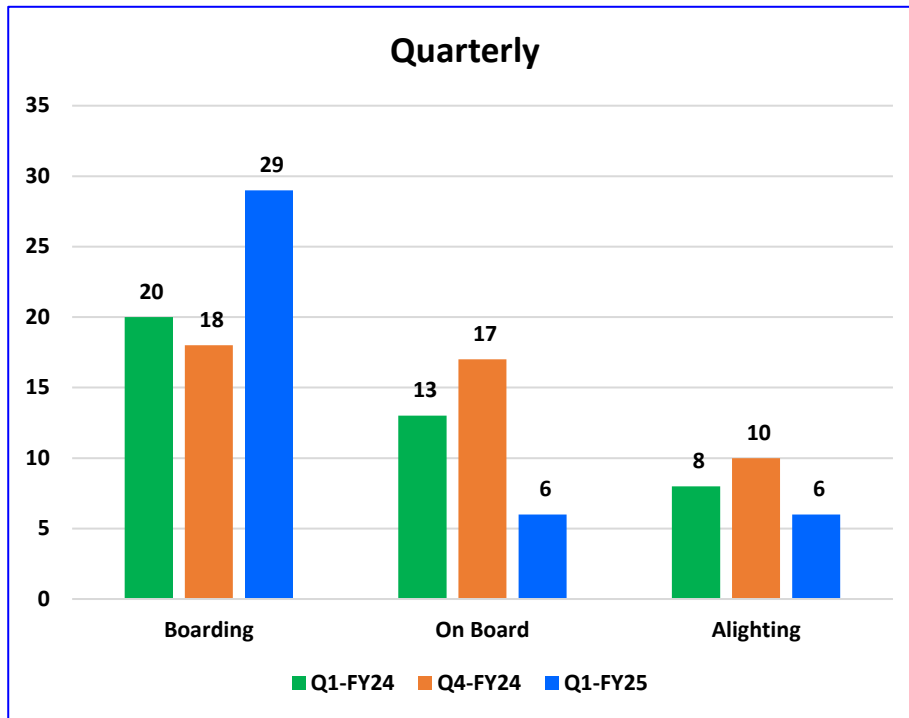
Risk Management & Safety KPI's

Traffic Accidents



- Total Traffic Accidents in Q1 FY25 increased by 2 (4.0%) over Q4 FY24 and increased by 18 (52.9%) from a year ago, Q1 FY24
- Collisions with Other Vehicles (between intersections) for Q1 FY25 increased by 1 (11.1%) over Q4 FY24 and increased by 6 (150%) from a year ago, Q1 FY24
- Collisions with Other Vehicles (Intersections) for Q1 FY25 decreased by 3 (300%) over Q4 FY24 and by 1 (100%) from a year ago, Q1 FY24
- Collisions with Other Vehicles (Rear End) for Q1 FY25 decreased by 6 (600%) over Q4 FY24 and by 2 (200%) from a year ago, Q1 FY24
- Collisions Between (District Vehicles) for Q1 FY25 increased by 3 (60%) over Q4 FY24 and by 5 (166.7%) from a year ago, Q1 FY24
- Other Collisions for Q1 FY25 increased by 7 (25.9%) over Q4 FY24 and by 10 (41.7%) from a year ago, Q1 FY24
- Metro average of 105 is based on 3-year average (FY22, FY23, FY24); 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

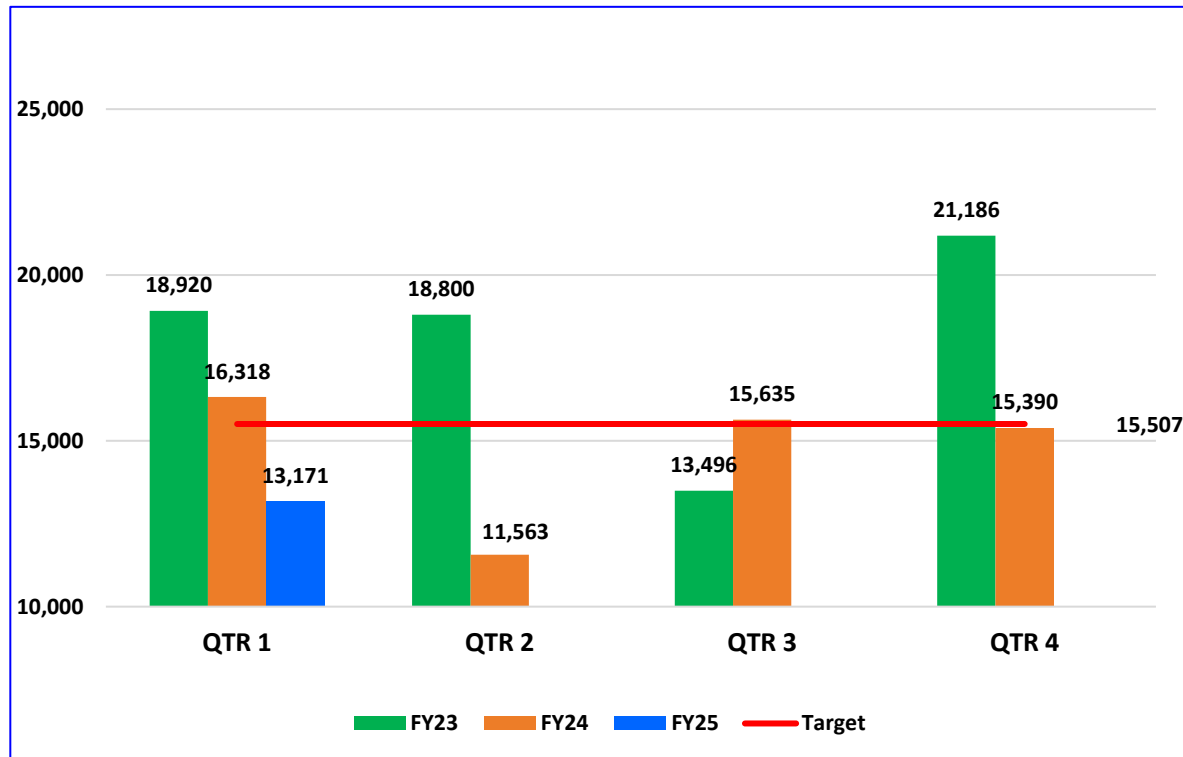


- Most boarding incidents occur when the passengers are using cell phones, not paying attention, or sleeping.
- Safety, Fleet Maintenance, and Information Technology departments are collaborating to identify further methods to reduce the number of incidents.
- YTD Ridership numbers are 631,351, 631,888, and 718,557 respectively for FY23, FY24, and FY25

Metro Average of 134 is based on 3-year average (FY22, FY23, FY24)

Reliability KPI's

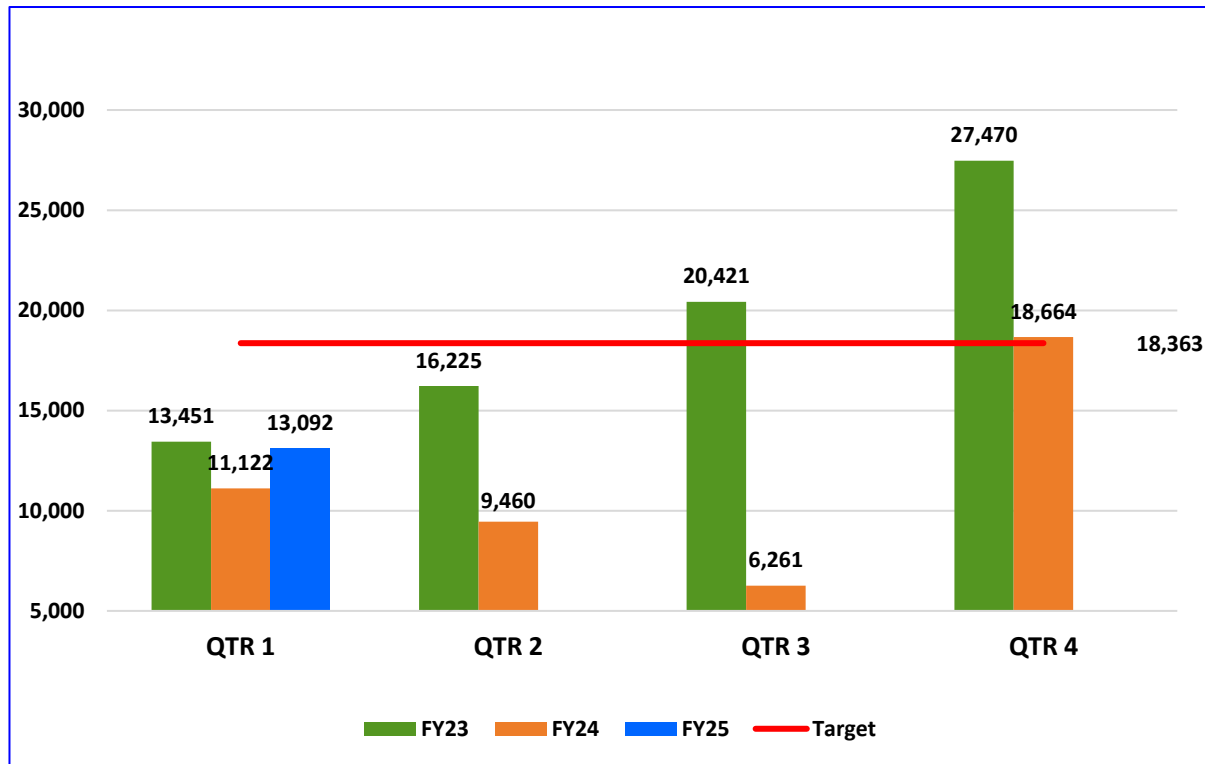
Mean Miles Between Chargeable Road Calls – Fixed Route (Local)



- Q1 FY25 mileage between calls decreased by 3,147 due to an increased in road calls by 36 compared to the same time period in FY24
- Chargeable road calls in Q1 FY25 were 24 in July, 19 in August, and 28 in September

The current target of 15,507 is based off a 3-year average (FY21, FY22, FY23)

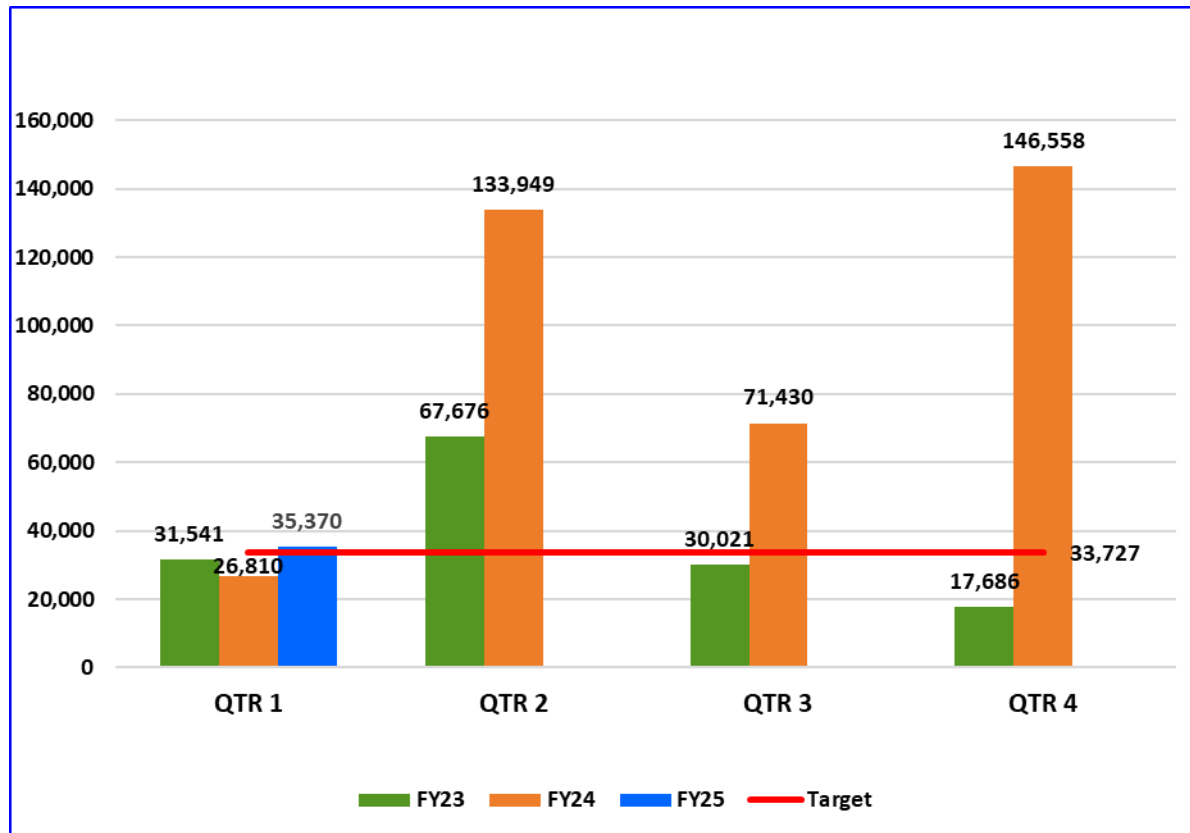
Mean Miles Between Chargeable Road Calls – Highway 17



- Q1 FY25 mileage between calls increased by 1,970 and road calls increased by 3 compared to the same time period in FY24
- Chargeable road calls in Q1 FY25 were 7 in July, 3 in August, and 3 in September

The current target of 18,363 is based off a 3-year average (FY21, FY22, FY23)

Mean Miles Between Chargeable Road Calls – ParaCruz

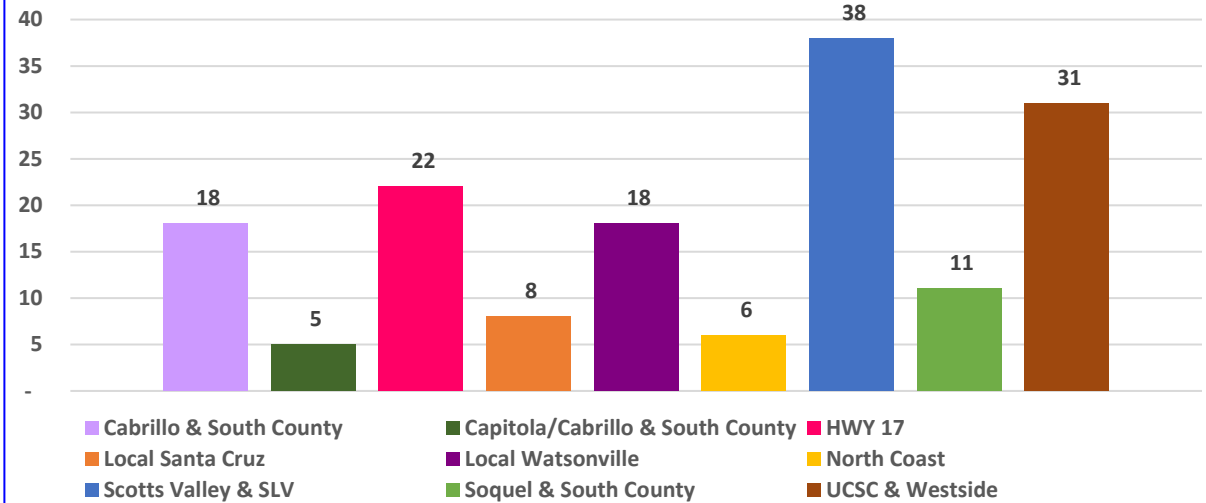
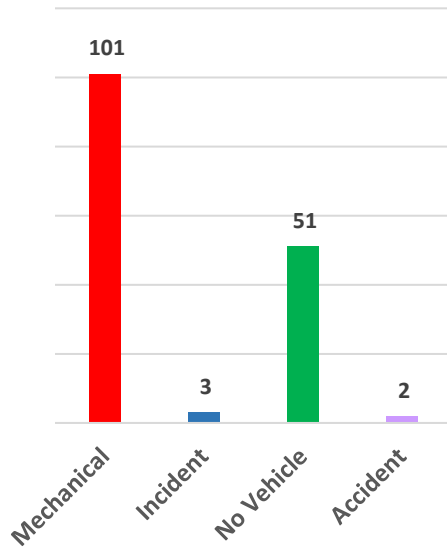


- Q1 FY25 mileage between calls increased by 8,560 and road calls stayed the same compared to the same time period in FY24, primarily due to the 7 new vans put into service last summer
- Chargeable road calls in Q1 FY25 were 4 in July, with none in August or September

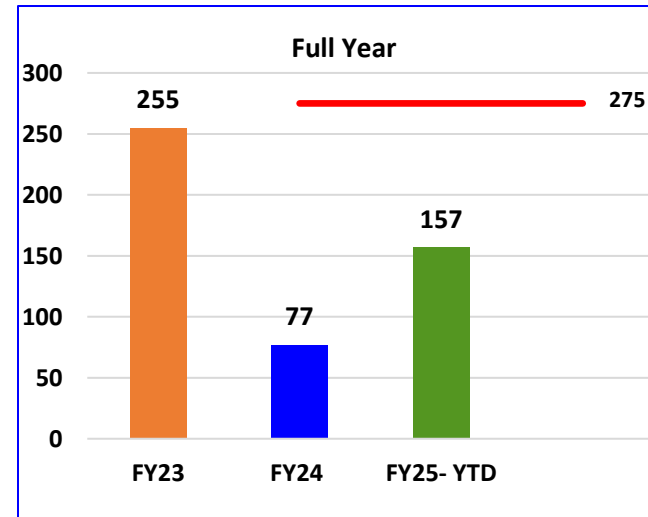
The current target of 33,727 is based off a 3-year average (FY21, FY22, FY23)

Dependability KPI's

Cancelled Trips by Cause & Region

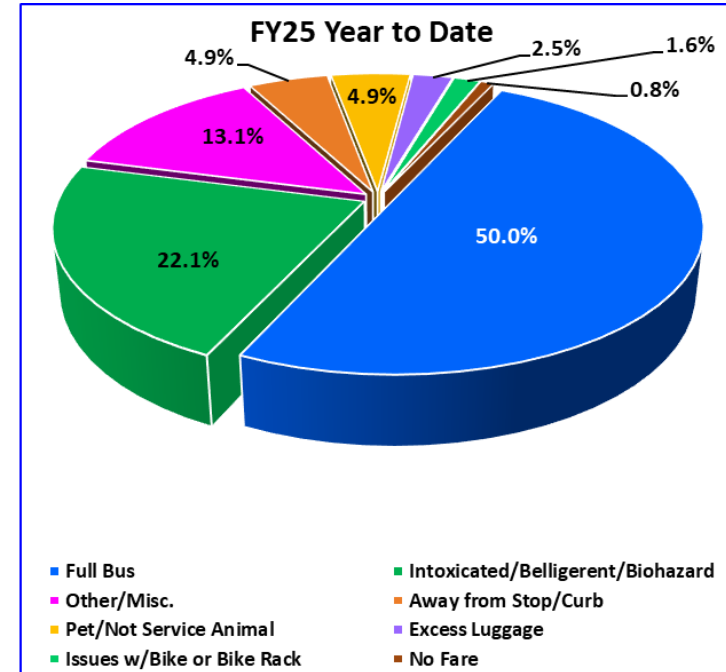
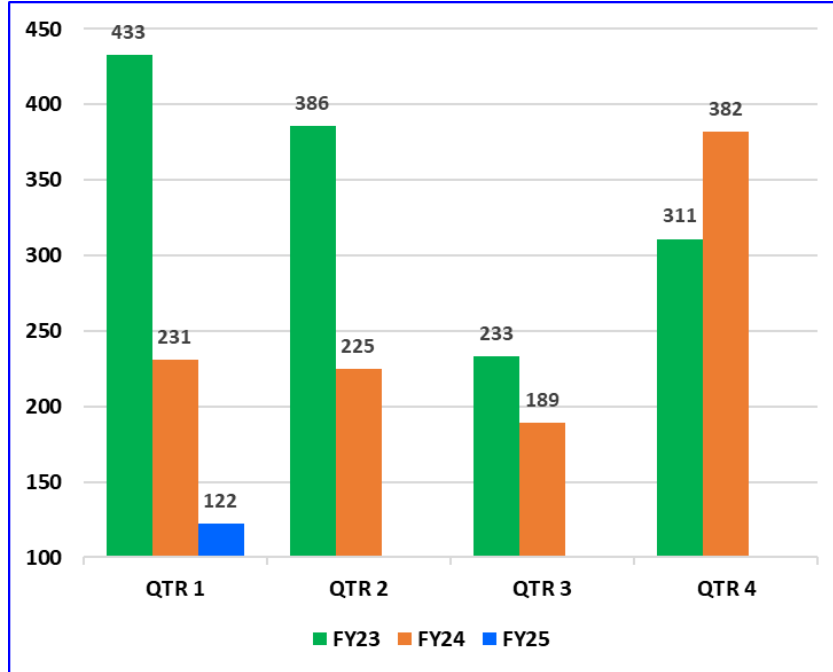


- There were 157 cancelled trips in Q1 FY25 – 124 in July, 15 in August and 18 in September primarily due to mechanical issues and no vehicle
- Nine regions were impacted – Cabrillo & South County, Local Santa Cruz, Scotts Valley & SLV, Capitola/Cabrillo & South County, Local Watsonville, Soquel & South County, HWY 17, North Coast, and UCSC & Westside



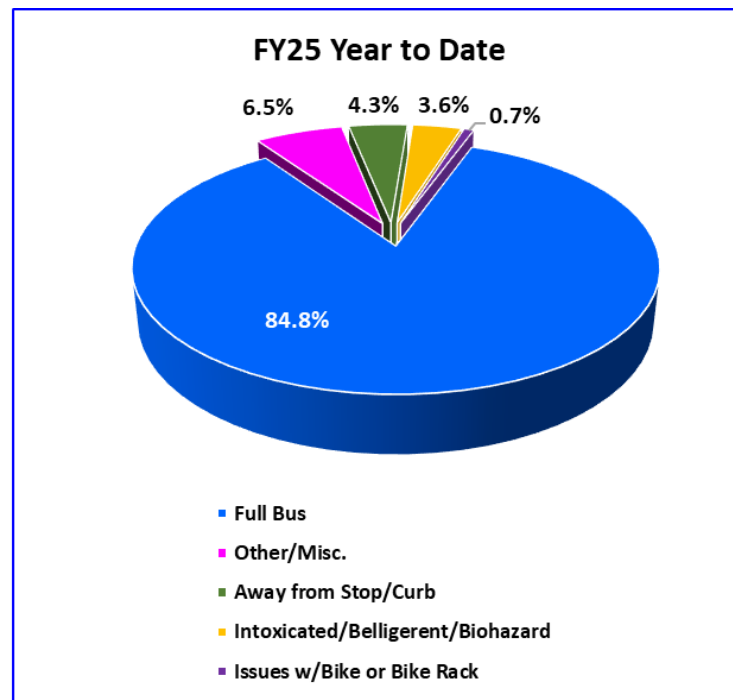
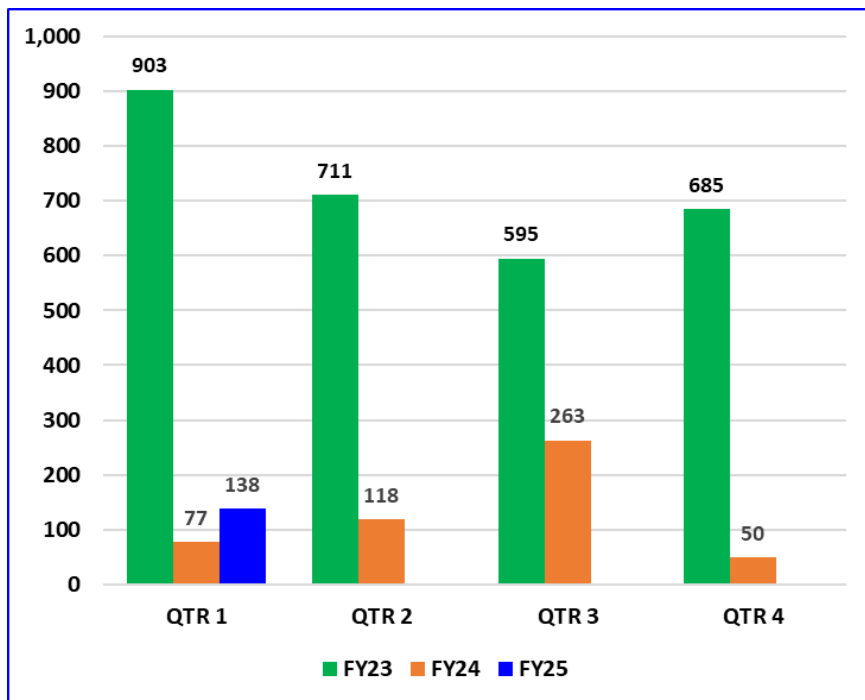
Full year average of 275 is based 3-year average (FY22, FY23, FY24)

Pass-Ups by Quarter/Reason – Fixed Route



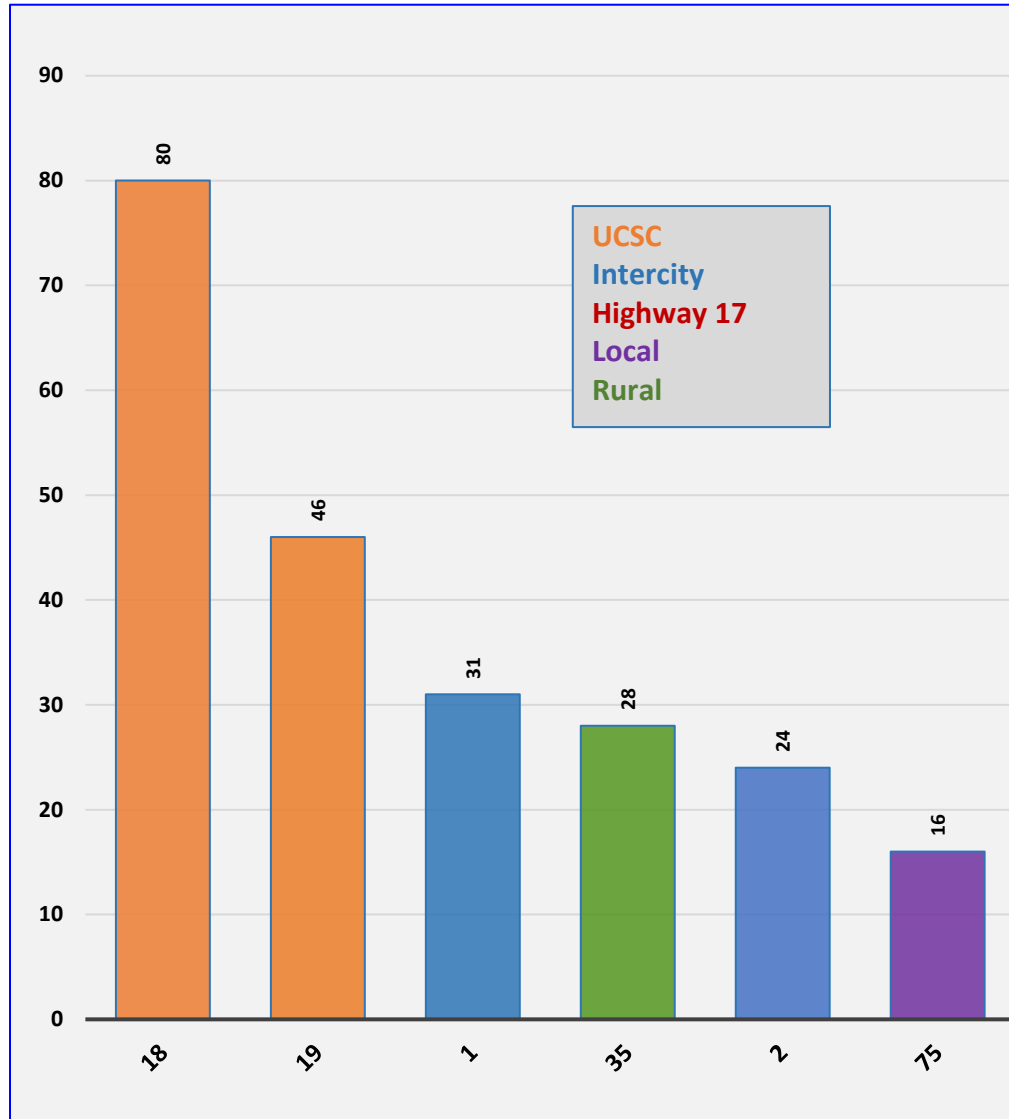
- In Q1 FY25, total pass-ups were 122, which is 109 (47.2%) lower when compared to Q1 FY24
- There were decreases across all months - July 32 pass-ups (35.6%), August 48 (63.2%), and September 29 (44.6%) when compared to the same time period as FY24
- 50.0% of Year-to-Date total pass-ups are caused by full bus capacity, followed by 22.1% due to Intoxicated/Belligerent/Biohazard, and 13.1% of Other/Misc, which covers a wide range of issues (such as Surfboards, No Shoes, Smoking/Vaping, and Hygiene to name a few), all other categories less than 4.9%

Pass-Ups by Quarter/Reason - UCSC



- In Q1 FY25, total pass-ups were 138, which is 61 (79.2%) higher when compared to Q1 FY24
- July had a decrease of 2 pass-ups (20.0%), August had an increase of 5 (500.0%), and September had an increase of 58 (87.9%) when compared to the same time period as FY24
- 84.8% of Year-to-Date total pass-ups are caused by full bus capacity, followed by 6.5% caused by other/Misc., all other categories are less than 4.3%

YTD FY25 Pass-Ups by Route*



- YTD Pass-ups total 260
- UCSC Routes comprised 138 (53.1%), of which 84.8% were due to full bus capacity
- Intercity Routes comprised 62 (23.8%), of which 48.4% were due to Other/Misc.
- Rural Routes comprised 32 (12.3%), of which 50.0% were due to full bus capacity
- Local Routes comprised 20 (7.7%), 95.0% were due to Other/Misc.
- Highway 17 Routes comprised 8 (3.1%), of which 50.0% were due to Other/Misc.

**Only Routes with greater than 10 pass-ups are shown in the graph*

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 <u>all</u> 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	FY20	FY21	FY22	FY23	FY24	YTD FY25
Farebox Recovery	24.1%	11.2%	16.6%	18.6%	16.2%	13.7%
Fixed Route/Commuter Cost/RSH	211	298	271	247	296	240
ParaCruz Cost/Trip	72	181	91	69	80	98
Monthly Mean Miles Between Chargeable Road Calls - Fixed Route	13,216	13,695	15,401	17,602	14,494	13,171
Monthly Mean Miles Between Chargeable Road Calls - Highway 17	24,126	18,016	18,699	18,341	9,959	13,092
Monthly Mean Miles Between Chargeable Road Calls - ParaCruz	44,329	53,393	29,626	29,729	66,326	35,370
Annual Road Miles - Fixed Route	2,443,157	1,999,474	2,325,531	2,358,618	2,594,510	935,109
Annual Road Miles - Highway 17	562,616	324,281	373,984	403,492	468,091	170,191
Annual Road Miles - ParaCruz	623,119	373,748	503,650	505,399	530,608	141,481