KEY PERFORMANCE INDICATORS (KPI) REPORT
FOR 2nd Quarter through December 31, 2023

Board of Directors

February 23, 2024

Chuck Farmer, Chief Financial Officer

Overview of Today's Presentation:

| KPI Category	Criteria / Metric
Financial Performance	✓ System Farebox Recovery Ratio ✓ Fixed Route & Commuter Cost / RSH ✓ ParaCruz Cost / Trip
Productivity	✓ Total Ridership and Total Ridership / Hour ✓ UCSC, Cabrillo, Highway 17, & Local Ridership ✓ Passengers / RSH by Route
Risk Management & Safety	✓ Traffic Accidents ✓ Passenger Incidents
Reliability	✓ Miles between Chargeable Road Calls for Fixed Route, Highway 17, & ParaCruz
Dependability	✓ Cancelled Trips by Cause & Region ✓ Pass-Ups for Fixed Route, UCSC, & Routes

Financial Performance KPI's

System Farebox Recovery:
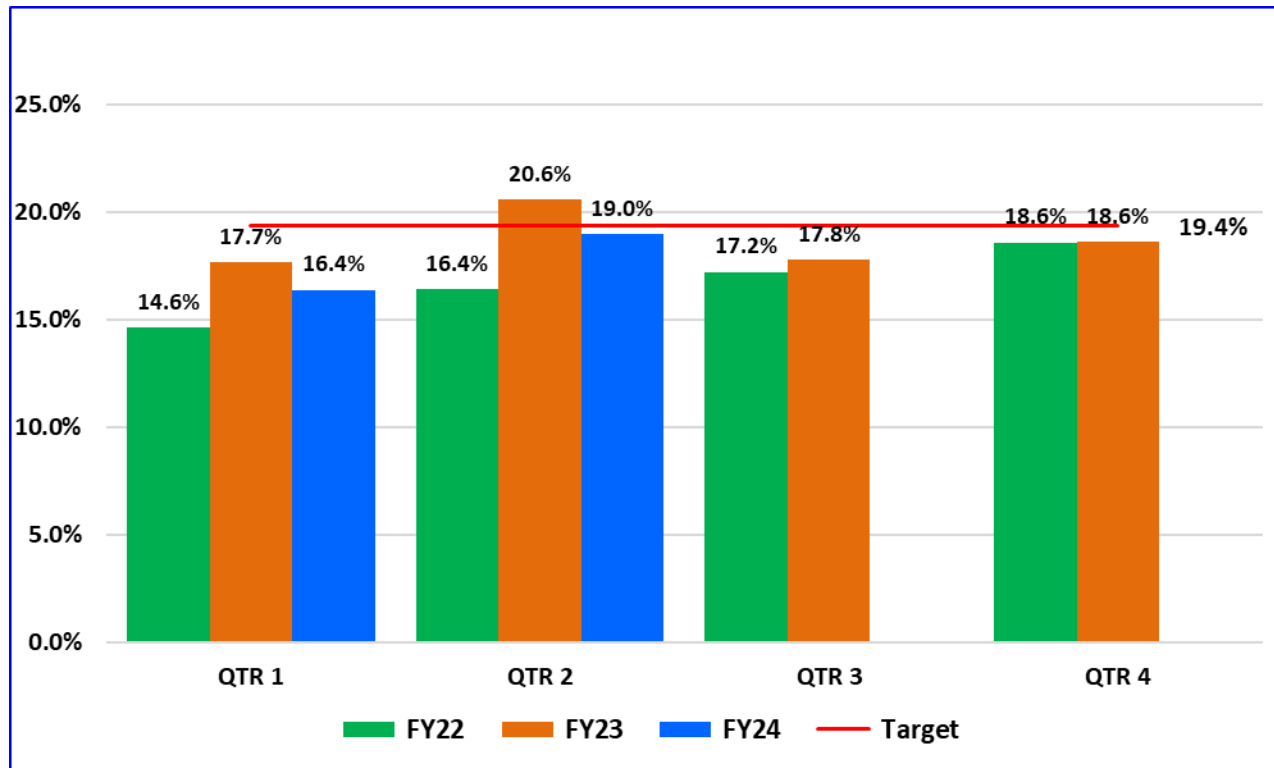
- Q2 FY24 Farebox Recovery is 19.0%, a year-over-year decline of 1.6% primarily due to Youth Free Fares; 0.4% lower than target and 2.6% higher than Q1 FY24 partially due to increased ridership

- 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
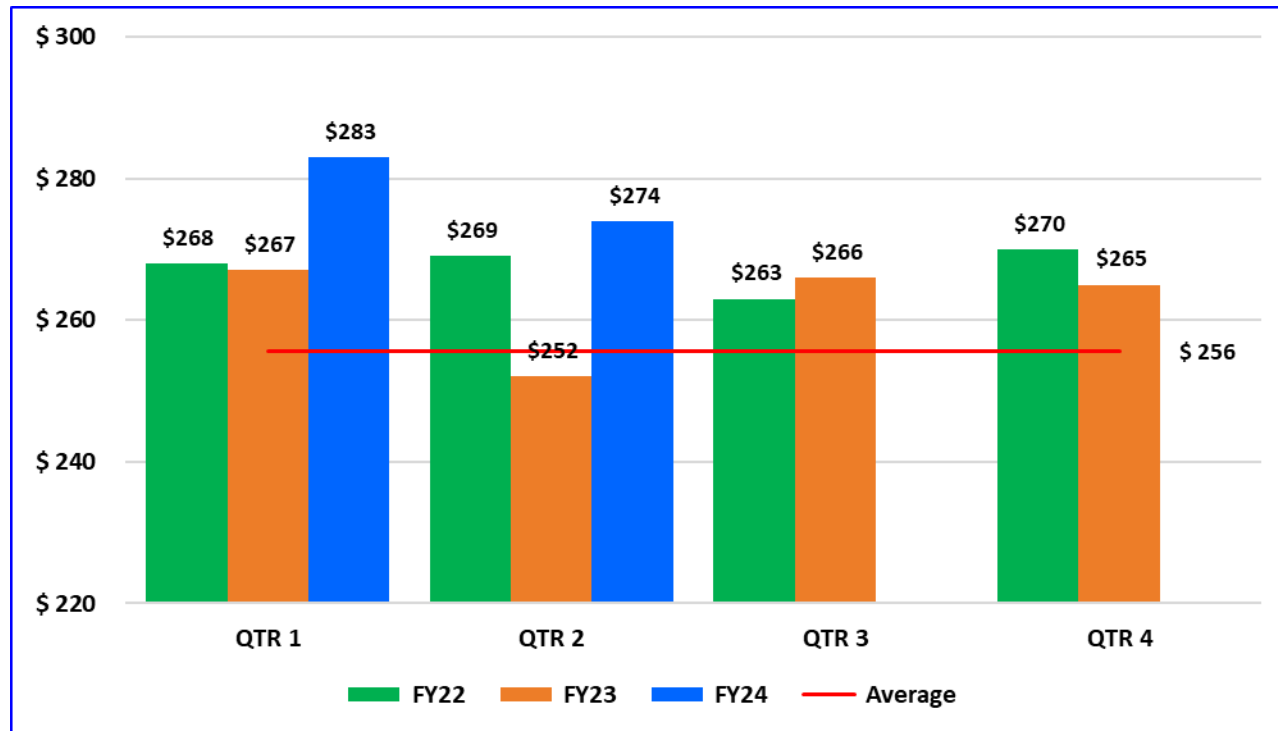
- Q2 FY24 Cost per RSH is $274, a modest increase ($22) over last year's Q2 costs, and $18 higher than average due to higher labor costs and marketing costs related to the Reimagine Metro campaign

- Revenue Service Hours increased 2.0% along with Fixed Route costs that increased by 11.0% 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)
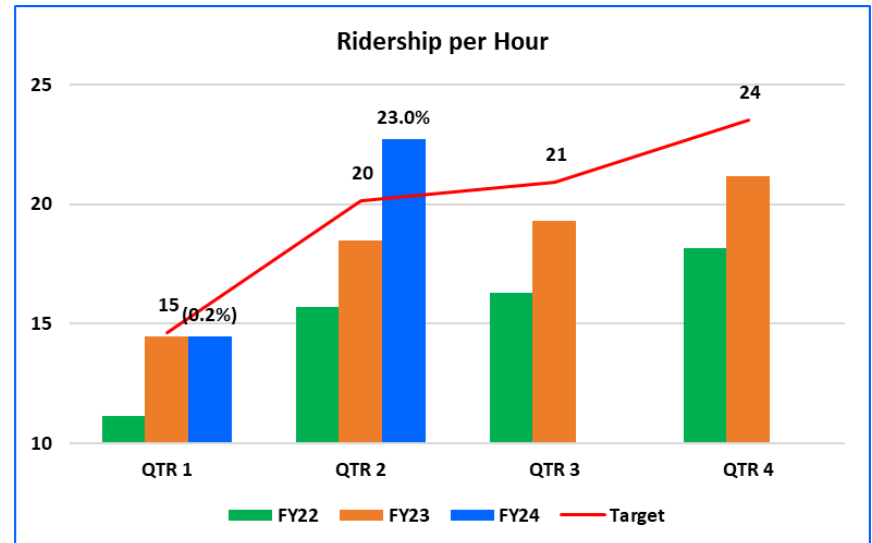
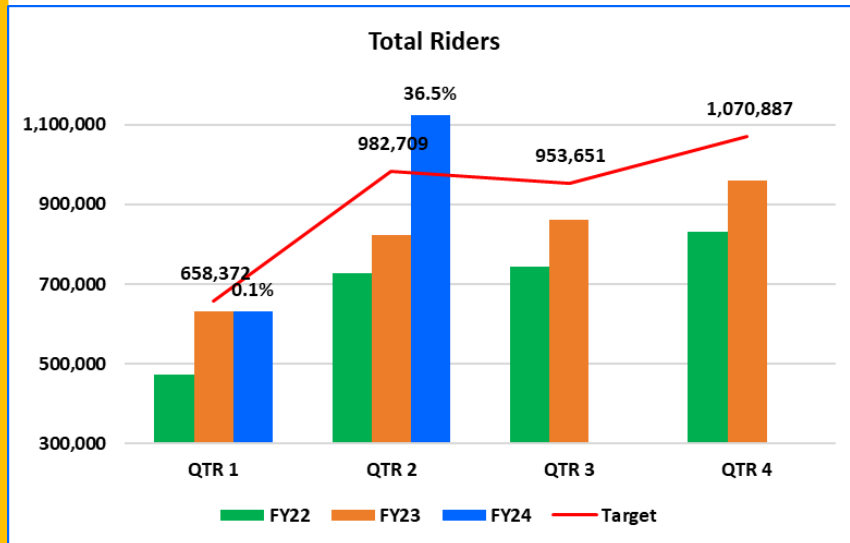# ParaCruz Cost per Trip
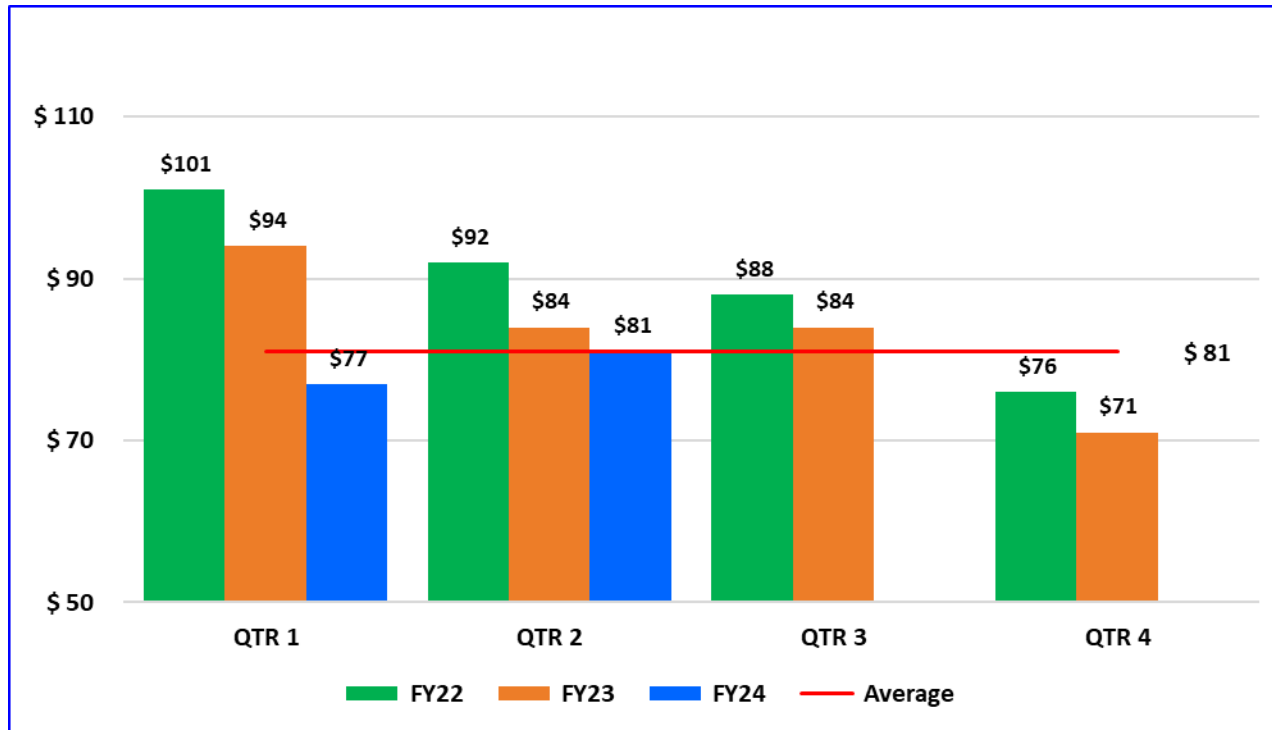
- Q2 FY24 Cost per Trip is $81, a year-over-year improvement of $3, and flat with the average

- Trips delivered increased 21.8% and costs increased 17.3% 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)

Total Riders — FY22, FY23, FY24, Target by quarter. Values labeled: 658,372 (0.1%), 982,709 (36.5%), 953,651, 1,070,887.

Ridership per Hour — FY22, FY23, FY24, Target by quarter. Values labeled: 15 (0.2%), 20 (23.0%), 21, 24.

- An 8.4% decrease in ridership in local, non-student ridership service

- A 67.0% increase in Student ridership, includes the Youth Ride Free ridership

- A 2.4% increase 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)
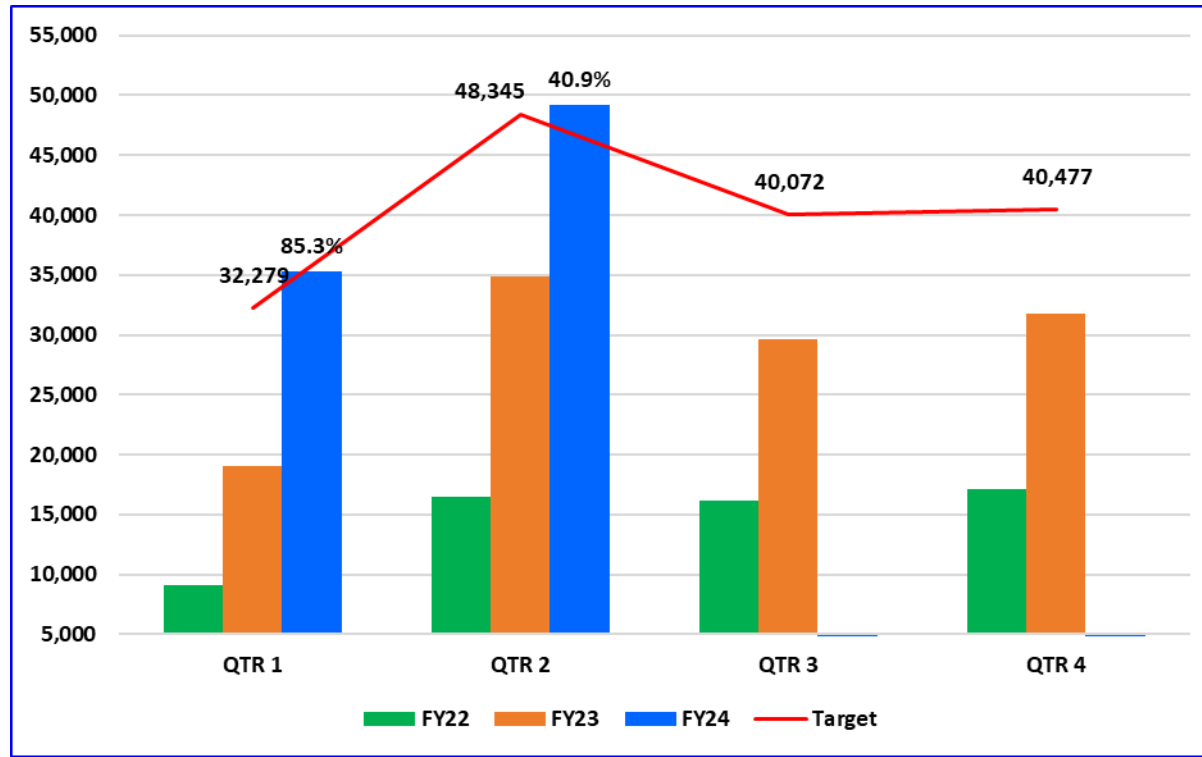
- UCSC ridership increased 57.1% over Q2 of FY23

- Cabrillo ridership increased 40.9%

- Youth ridership increased 388.2%

- The Quarterly RPH Target is based on the average quarterly actuals from FY19, FY22, and FY23 (excludes FY20/FY21 due to COVID impact)
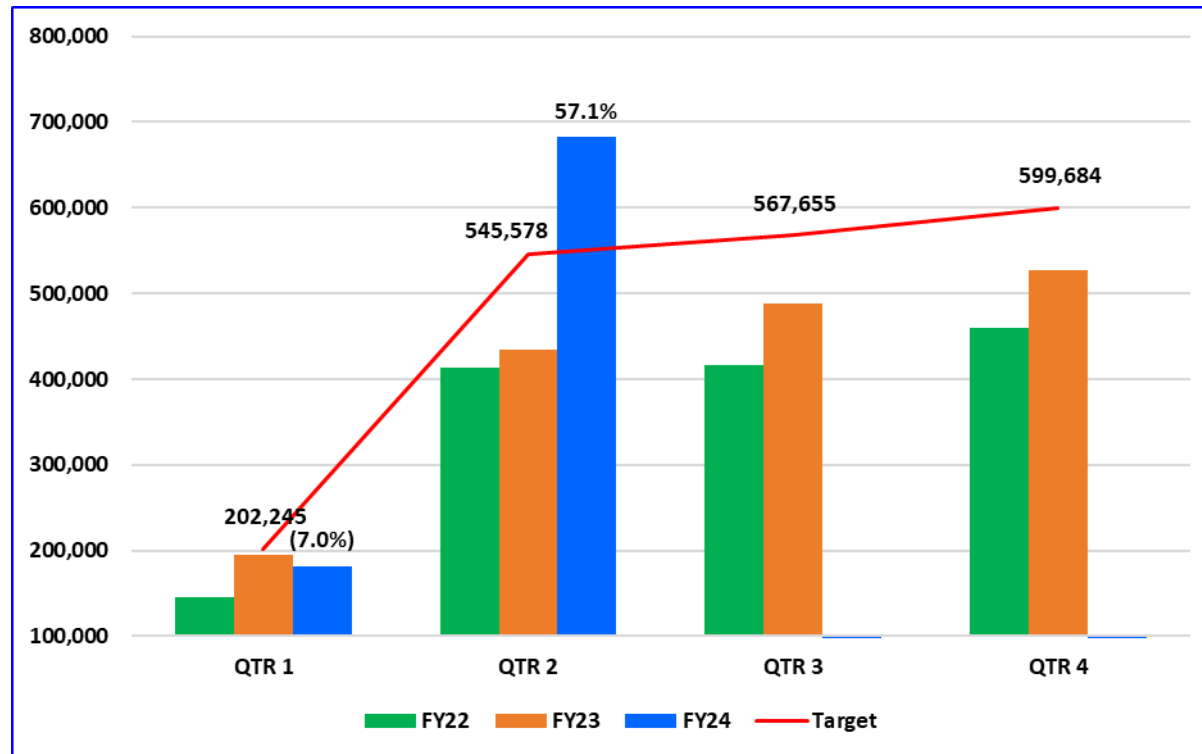
UCSC Ridership

- Q2 Ridership increased 57.1% as a result of several factors. Additional service was operated on the routes 18 and 19 (implemented in September), fall enrollment and on-campus residency increased 1.5% and 1.1%, respectively, and there were five more days of instruction in the month of December.

- 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

- Q2 Ridership increased 40.9% as more students returned to in-person sessions, though over half of those enrolled were taking online classes, at least part-time. Student enrollment also increased by 0.8%.

- 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
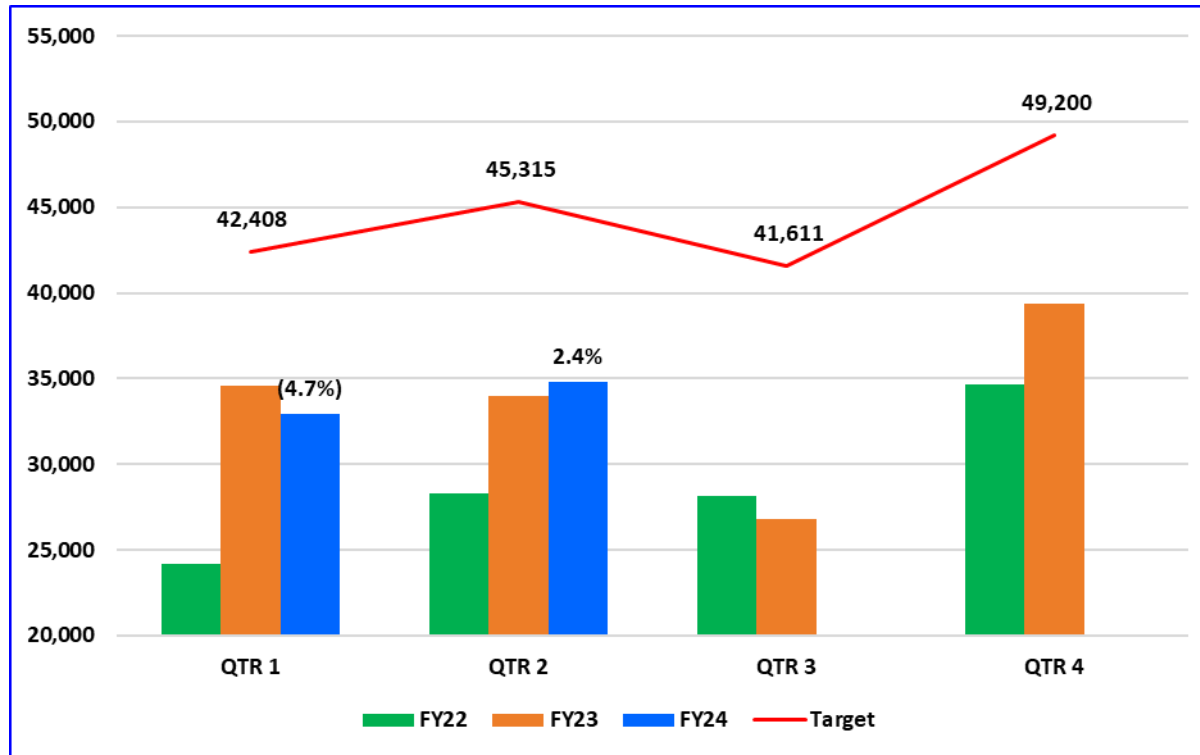
- Q2 Ridership increased 2.4% primarily due to the relative absence of inclement weather this quarter. This year, there was almost six less inches of rain in December compared to last year, which is 51.5% decrease. Without this kind of storm surge happening this December, METRO was able to reliably operate all Hwy 17 service without dropping trips

- 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
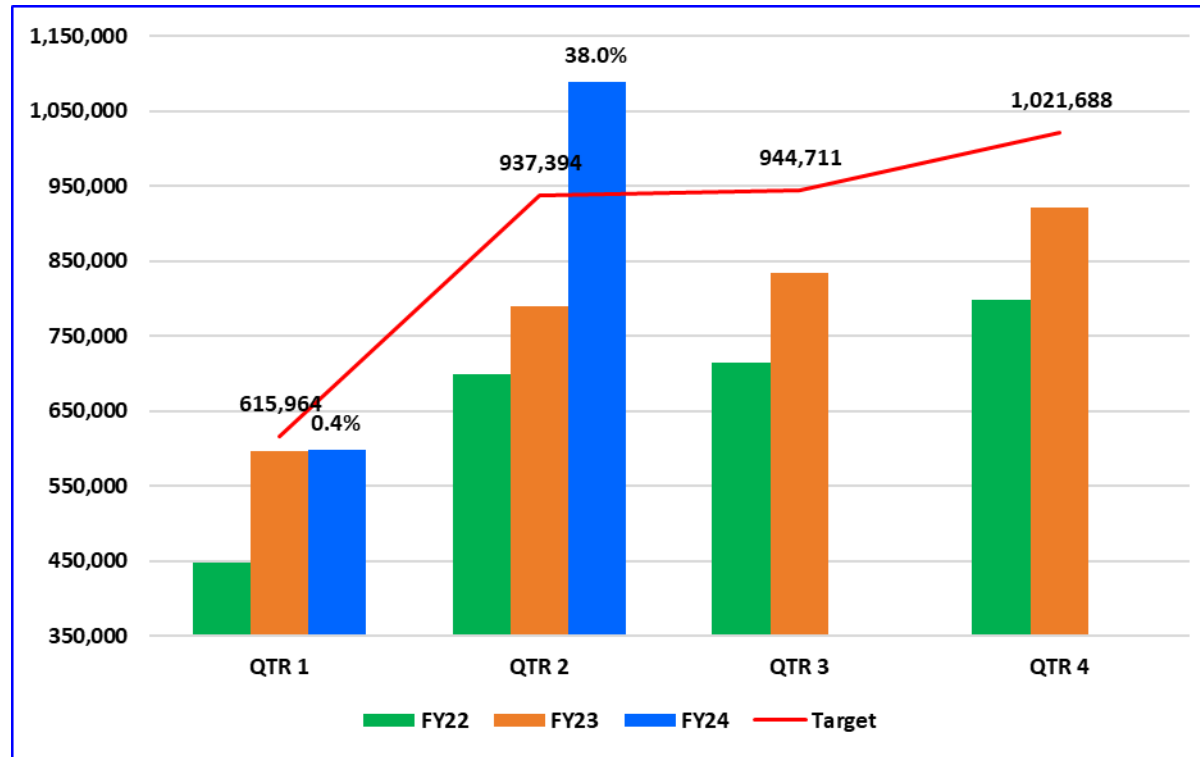
- Q2 Ridership increased 38.0% due to an additional 10.3% of vehicle revenue hours operated. Furthermore, it seems that more than half of the growth in K-12 boardings, as a result of the Youth Cruz Free program, appear to be attributable to new riders or increased boardings from existing riders. UCSC and Cabrillo ridership also increased 57.1% and 40.9%, respectively.

- The Quarterly Ridership Target is based on the average quarterly actuals from FY19, FY22, and FY23 (excludes FY20/FY21 due to COVID impact)
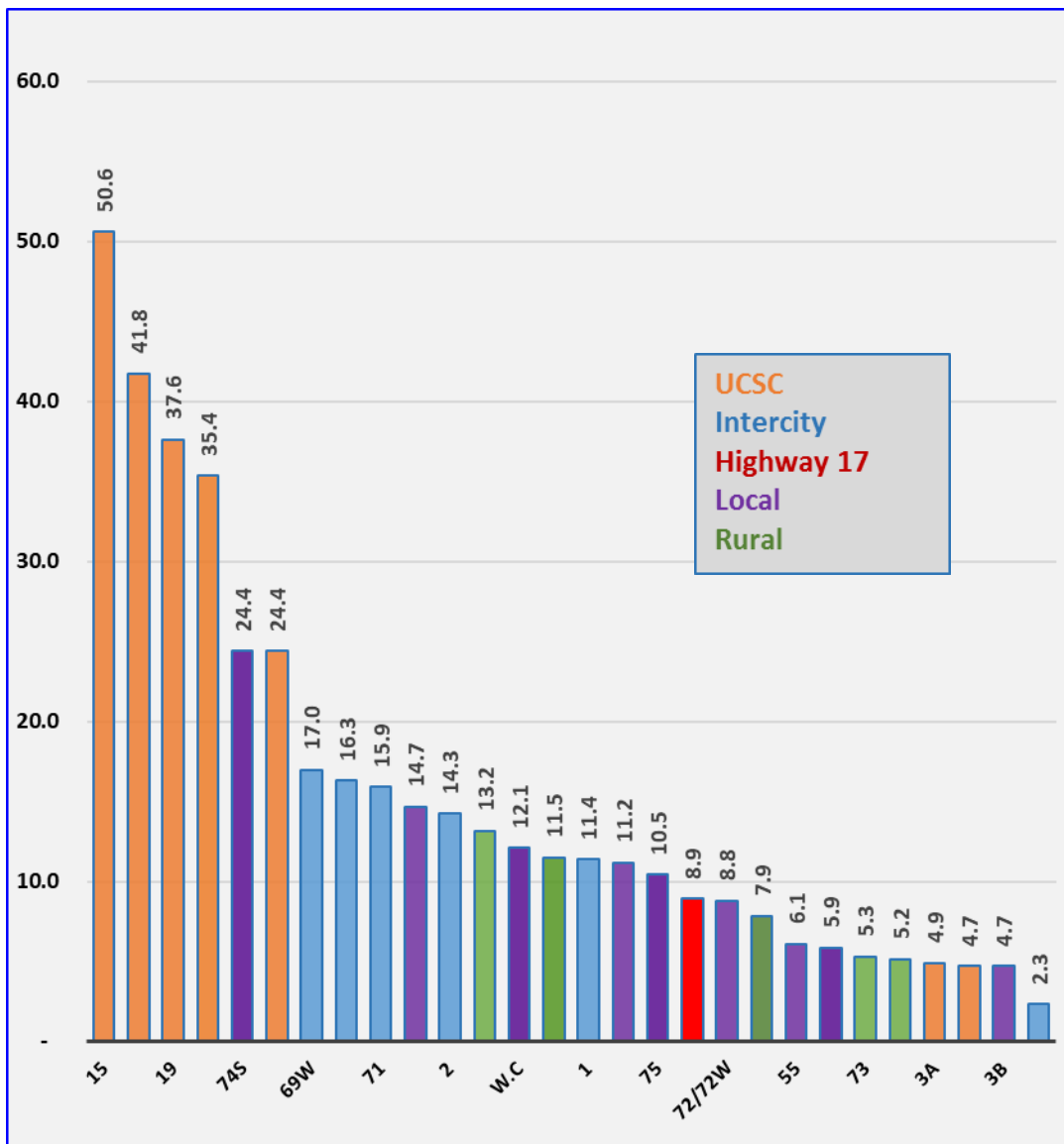
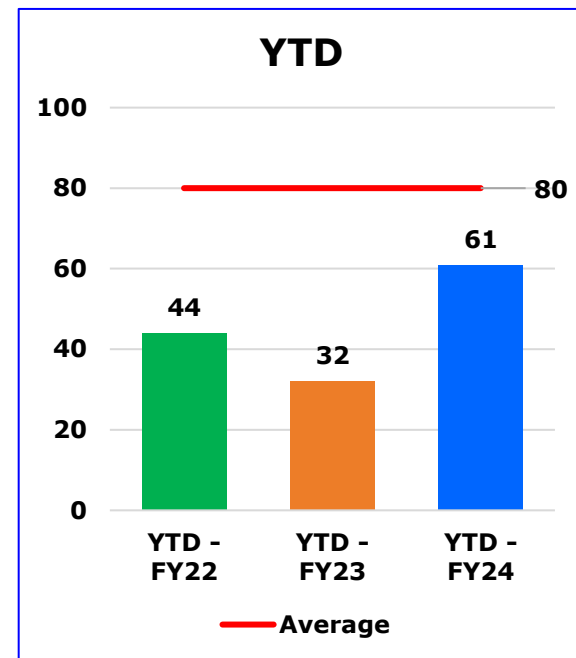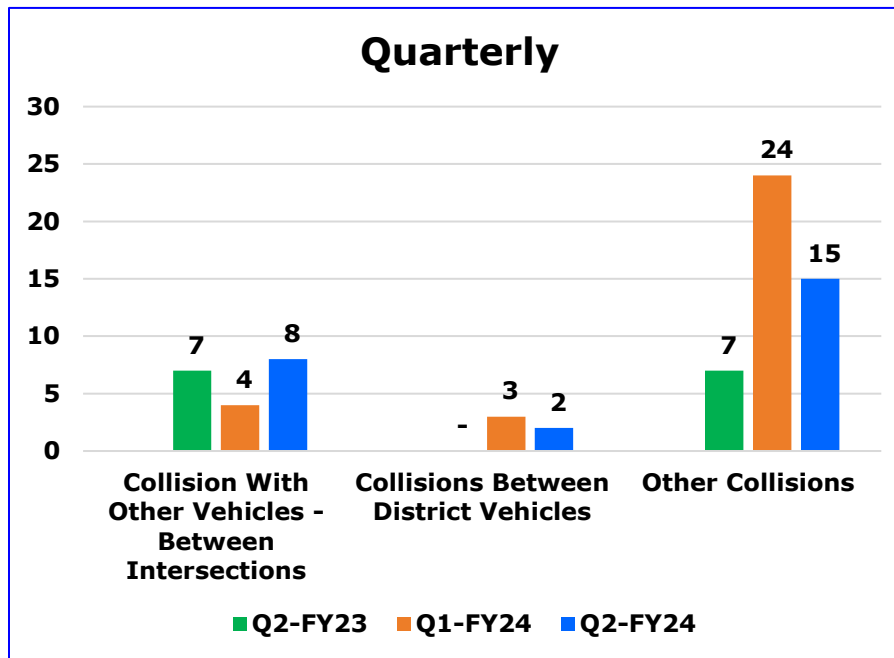# YTD FY24 Passengers/Service Hours by Route

- Total Passengers/Service Hours are 19.0 for Q2 FY24

- Combined UCSC Passengers/Service Hours were 37.4

- Combined Intercity Passengers/Service Hours were 16.1

- Combined Rural Passengers/Service Hours were 10.8

- Combined Local Passengers/Service Hours were 10.5

- Combined Highway 17 Passengers/Service Hours were 8.9

Risk Management & Safety KPI's

Traffic Accidents

Quarterly

Category	Q2-FY23	Q1-FY24	Q2-FY24
Collision With Other Vehicles - Between Intersections	7	4	8
Collisions Between District Vehicles	-	3	2
Other Collisions	7	24	15

YTD

	YTD - FY22	YTD - FY23	YTD - FY24
Value	44	32	61
Average			80

- Total Traffic Accidents in Q2 FY24 decreased by 6 (19%) over Q1 FY24 and increased by 11 (79%) from a year ago, Q2 FY23

- Collisions with Other Vehicles (between intersections) for Q2 FY24 increased by 4 (100%) over Q1 FY24 and increased by 1 (14%) from a year ago, Q2 FY23

- Collisions Between District Vehicles for Q2 FY24 decreased by 1 (33%) over Q1 FY24 and increased by 2 (100%) from a year ago, Q2 FY23

- Other Collisions for Q2 FY24 decreased by 9 (38%) over Q1 FY24 and increased by 8 (114%) from a year ago, Q2 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
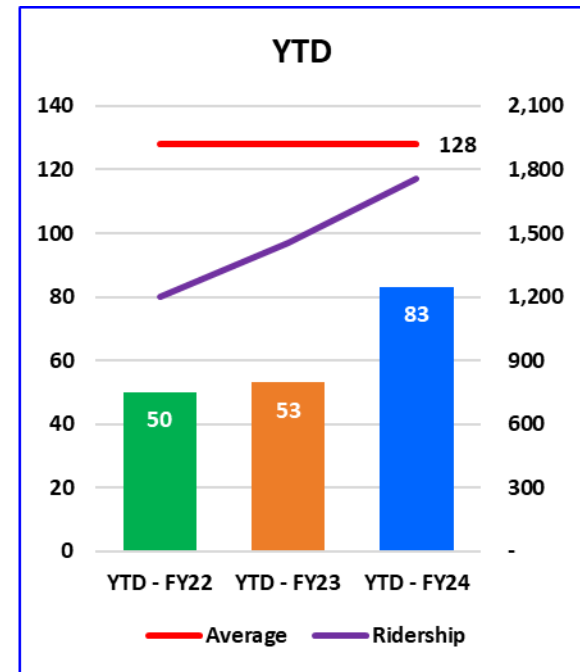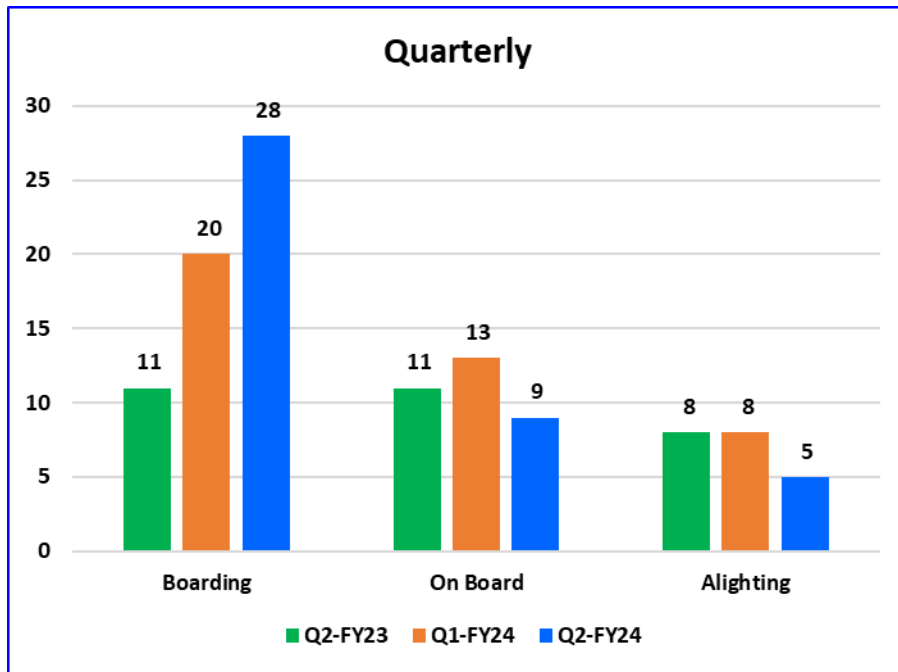
- Safety, Fleet Maintenance, and Information Technology departments are collaborating to identify further methods to reduce the number of incidents.

- Most boarding incidents occur when the passengers are using cell phones, not paying attention, or sleeping.

- YTD Ridership numbers are 1,200,211, 1,454,679, and 1,755,931 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)
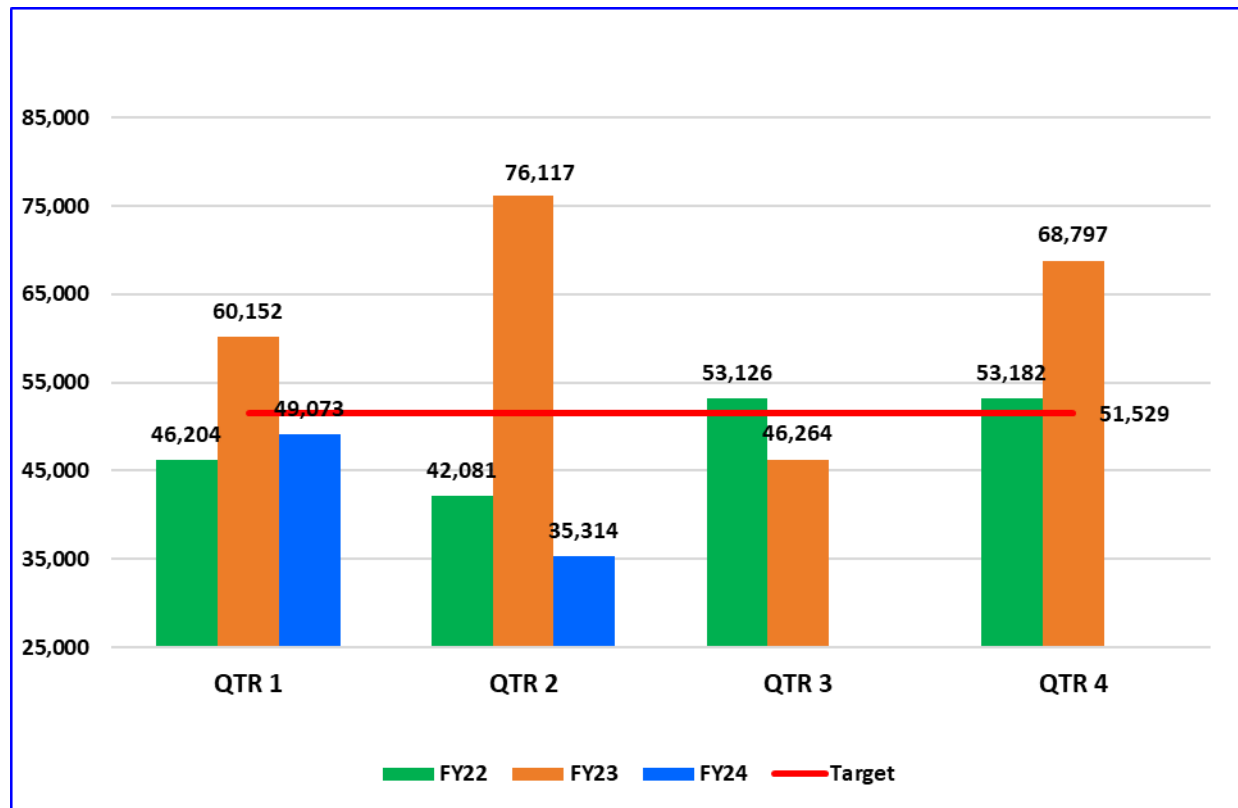
- Q2 FY24 mileage between calls decreased by 40,803 and road calls increased by 22 compared to the same time period in FY23
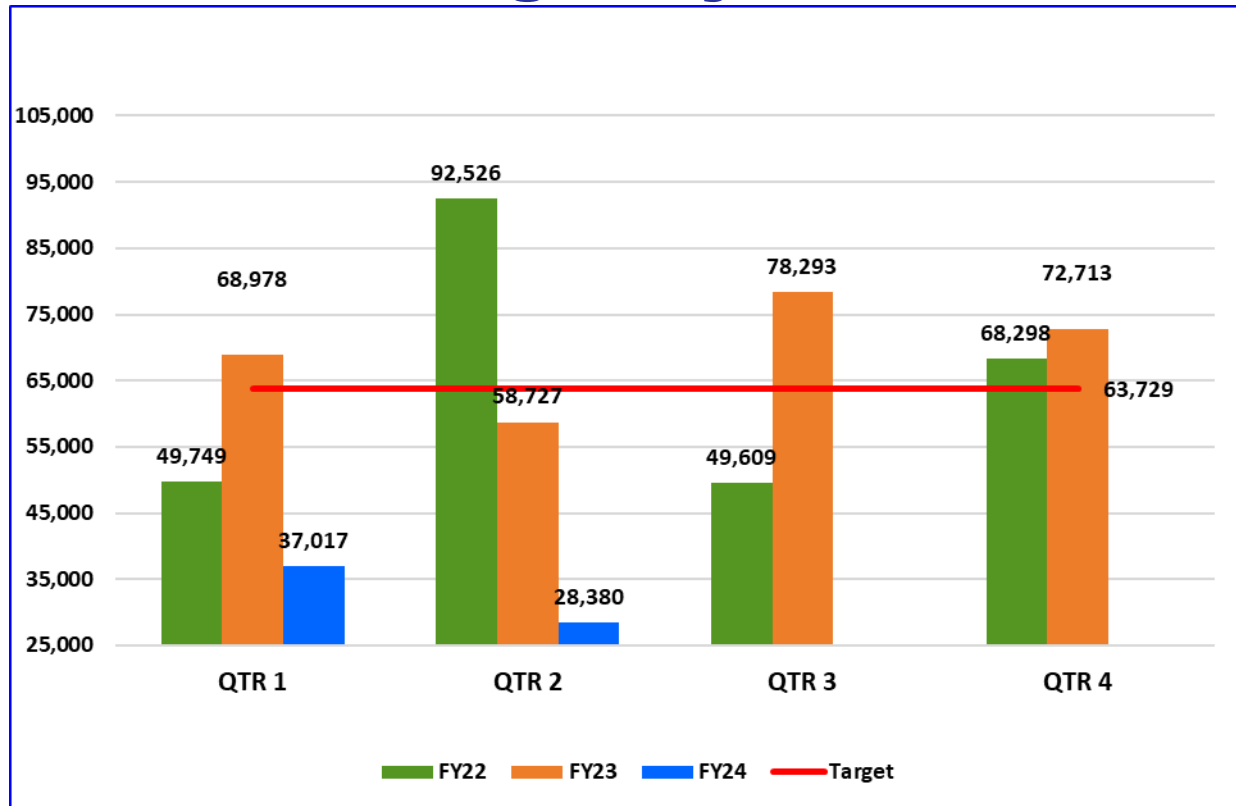
- Chargeable road calls in Q2 FY24 are 18 in October, 20 in November, and 15 in December

- 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

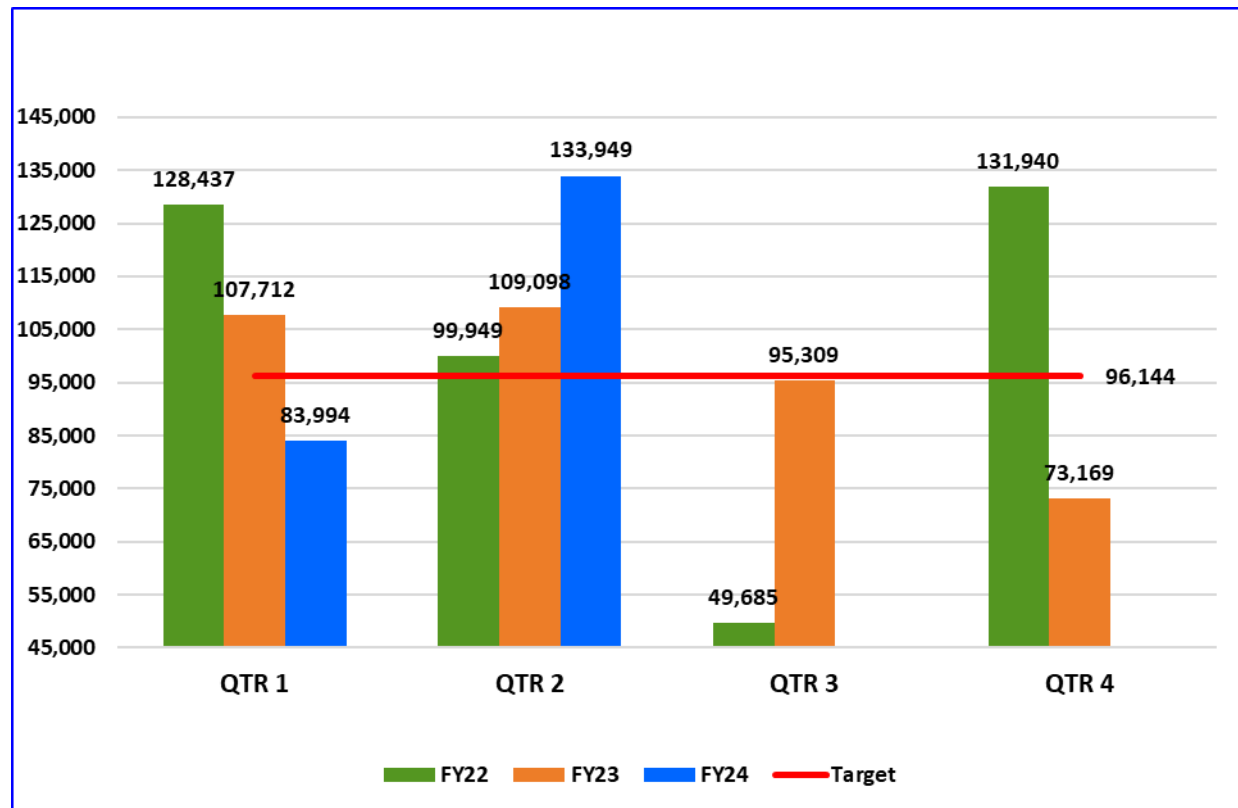- Q2 FY24 mileage between calls decreased by 30,347 and road calls increased by 6 compared to the same time period in FY23

- Chargeable road calls in Q2 FY24 are 4 each month (October, November, December)

- 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

- Q2 FY24 mileage between calls increased by 24,851 there was only 1 road call, a decrease of 1 when compared to the same time period in FY23

- In Q2 FY24 chargeable road calls were zero in October and November, and 1 in December

- 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
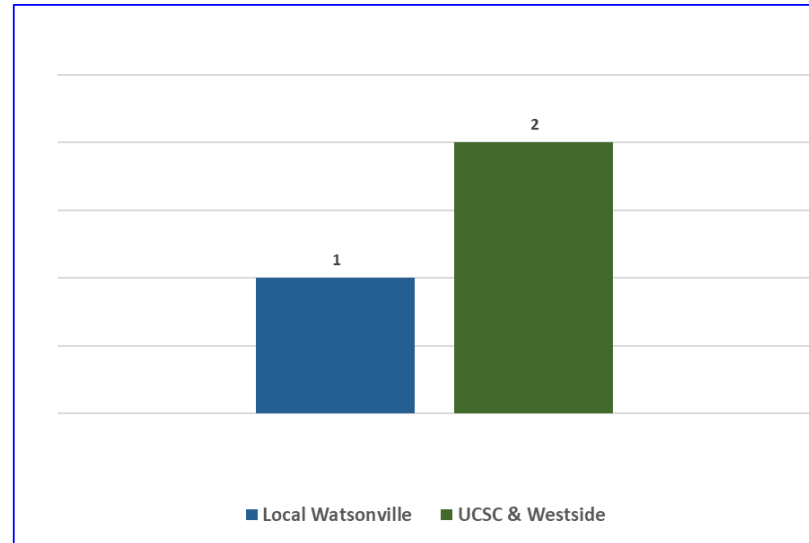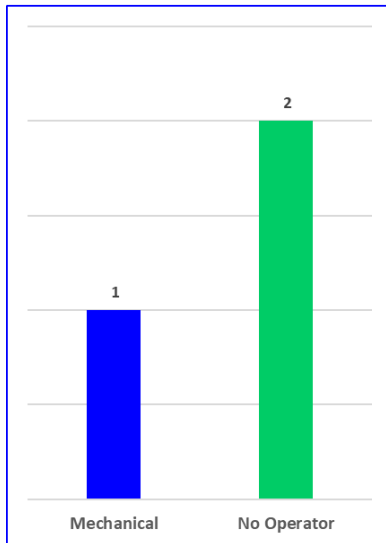
- There were 3 cancelled trips in Q2 FY24 – one due to mechanical issues, the other 2 due to no Operators.

- Only two routes were impacted – Local Watsonville and the UCSC & Westside

- Full year average of 288 is based on pre-pandemic 3-year average (FY19, FY22, FY23)
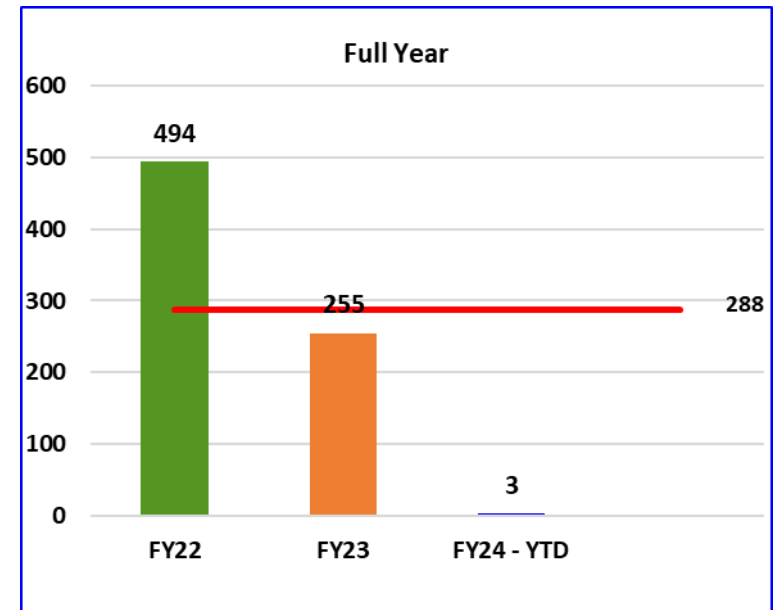
Pass-Ups by Quarter/Reason – Fixed Route

Bar chart (FY22, FY23, FY24):

	QTR 1	QTR 2	QTR 3	QTR 4
FY22	632	433	638	360
FY23	433	386	233	311
FY24	231	225		

FY24 Year to Date (pie chart):
- Full – 27.9%
- Intoxicated/Belligerent/Biohazard – 25.9%
- Other/Misc. – 25.0%
- Away from Stop/Curb – 9.0%
- Pet/Not Service Animal – 5.0%
- Excess Luggage – 4.6%
- Issues w/Bike or Bike Rack – 2.0%
- No Fare – 0.7%

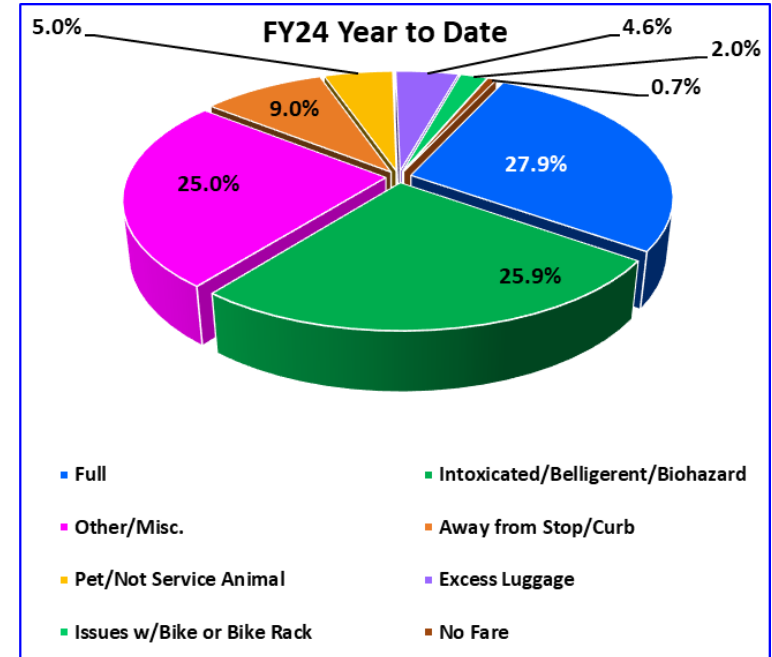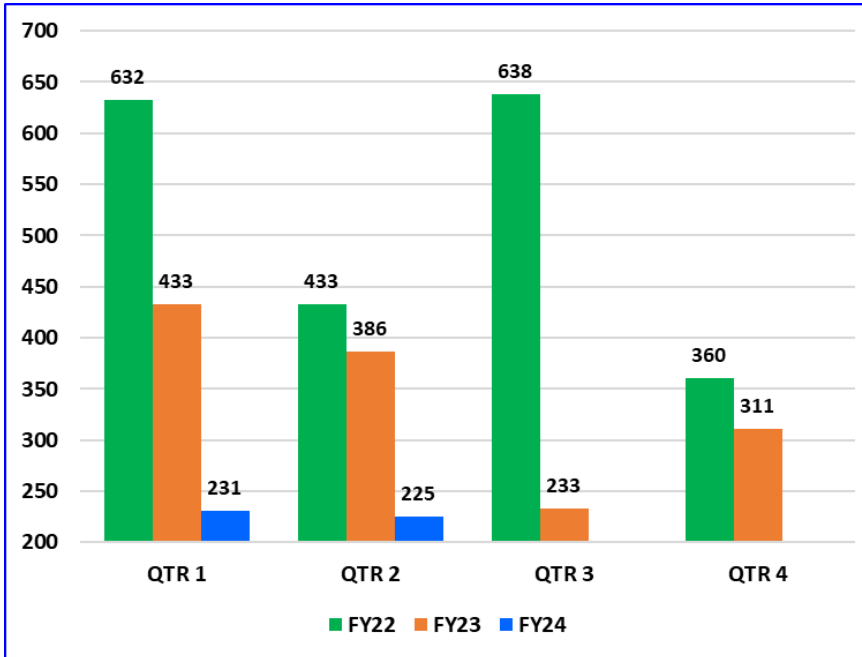- In Q2 FY24, total pass-ups were 225, which is 161 (41.7%) lower when compared to Q2 FY23

- October had a decrease of 118 pass-ups (58.7%), November had a decrease of 45 (35.4%), and December had an increase of 2 (3.4%) when compared to the same time period as FY23

- 27.9% of Year-to-Date total pass-ups are caused by full bus capacity, followed by 25.9% due to Intoxicated/Belligerent/Biohazard, and by 25.0% of Other, 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 10%

Pass-Ups by Quarter/Reason - UCSC

Bar chart "Pass-Ups by Quarter" with FY22, FY23, FY24:
- QTR 1: FY22 = 54, FY23 = 903, FY24 = 77
- QTR 2: FY22 = 1,191, FY23 = 711, FY24 = 118
- QTR 3: FY22 = 782, FY23 = 595
- QTR 4: FY22 = 555, FY23 = 685

Pie chart "FY24 Year to Date":
- Full: 77.4%
- Away from Stop/Curb: 9.7%
- Other/Misc.: 5.6%
- Intoxicated/Belligerent/Biohazard: 3.1%
- Issues w/Bike or Bike Rack: 2.1%
- Excess Luggage: 2.1%
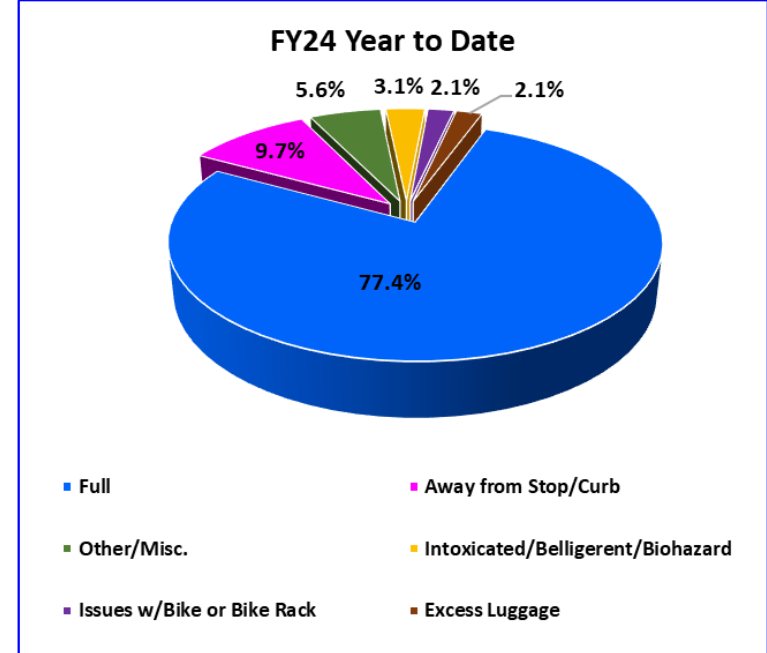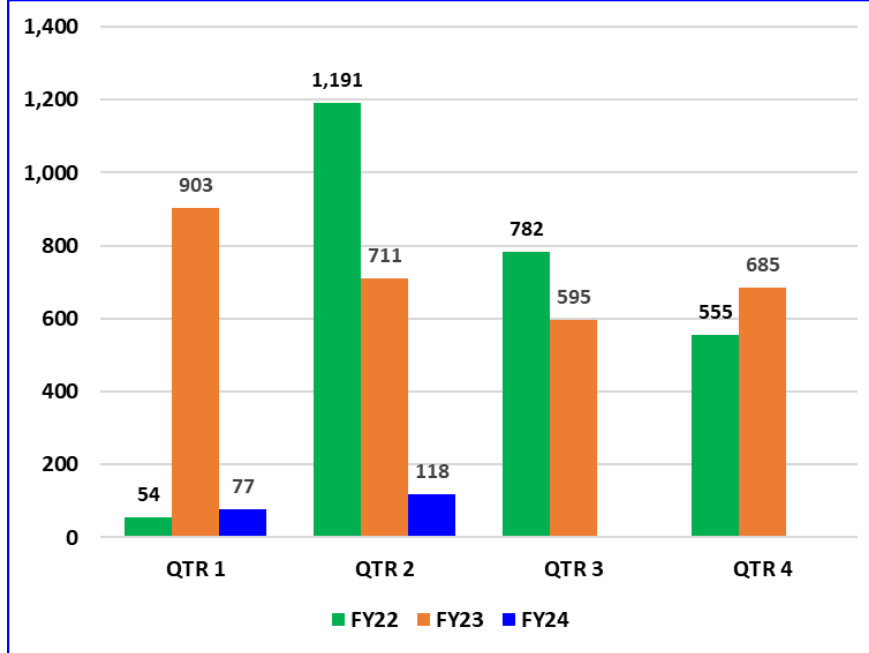
- In Q2 FY24, total pass-ups were 118, which is 593 (83.4%) lower when compared to Q2 FY23

- October had a decrease of 561 pass-ups (90.2%), November had a decrease of 56 (67.5%), and December had an increase of 24 (400.0%) when compared to the same time period as FY23

- 77.4% of Year-to-Date total pass-ups are caused by full bus capacity, followed by 9.7% caused by riders being Away from Stop/Curb, all other categories are less than 6%

YTD FY24 Pass-Ups by Route*
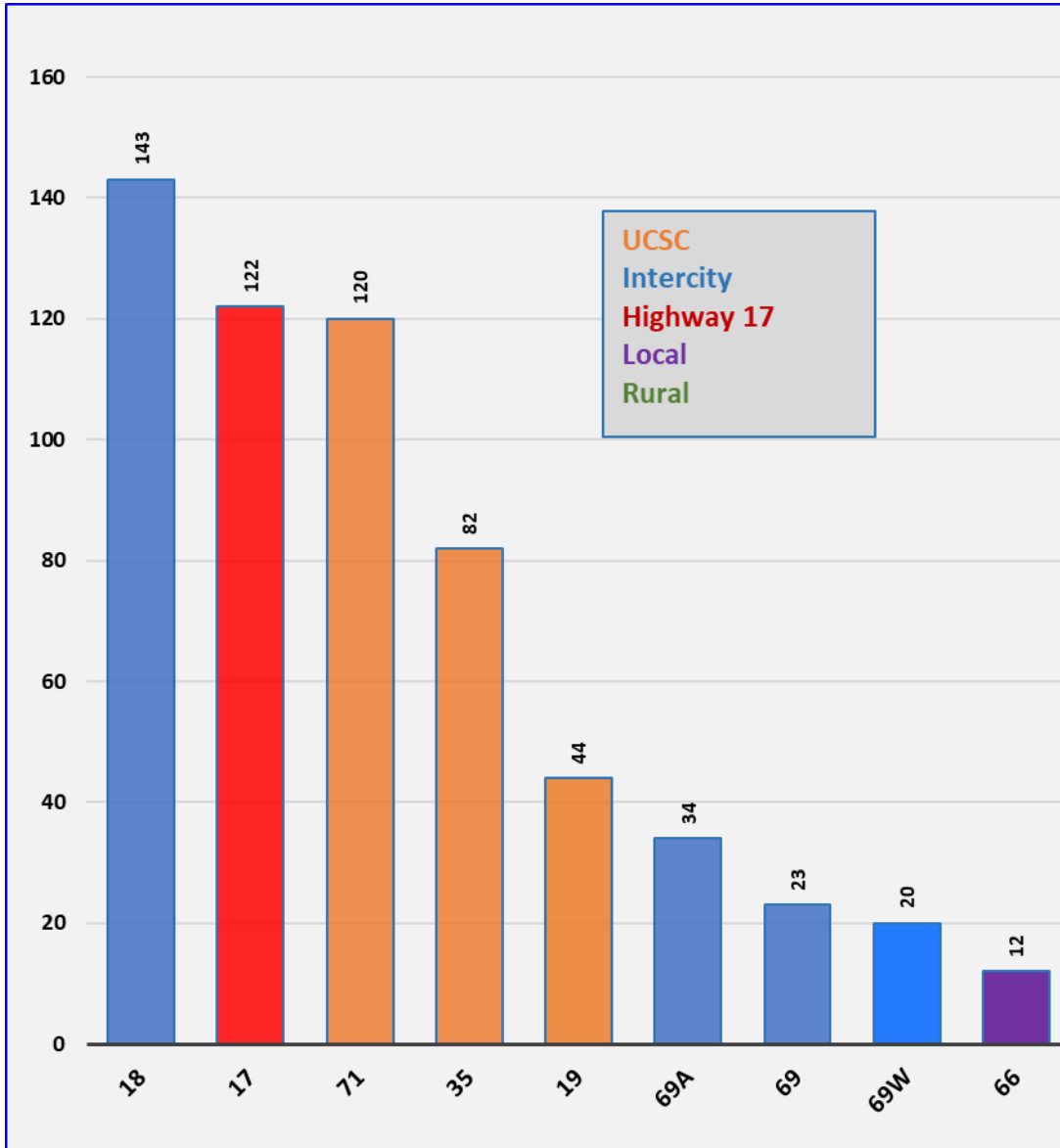
- YTD Pass-ups total 651

- Intercity Routes comprised 211 (32.4%), of which 32.7% were due to Intoxicated/Biohazard

- UCSC Routes comprised 195 (30.0%), of which 77.4% were due to full bus capacity

- Highway 17 Routes comprised 122 (18.7%), of which 64.8% were due to full bus capacity

- Rural Routes comprised 83 (12.7%), of which 42.2% were due to full bus capacity

- Local Routes comprised 40 (6.1%), 42.5% were due to Intoxicated/Biohazard

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

Questions ?

KPI Metric Descriptions & Importance

Metric	Description & Importance
Financial Performance	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. 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. Data presented is by Quarter, for the current and past two fiscal years.
Productivity	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. 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. Highway 17 demonstrates METRO's commuter ridership, connecting Santa Cruz to San Jose. Local Ridership excludes student and commuter routes and reflects all other routes within the county. 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. Data presented is by Quarter, for the current and past two fiscal years.

KPI Metric Descriptions & Importance, con't

Metric	Description & Importance
Risk Management & Safety	Traffic Accidents are broken down into different categories: Collisions between intersections, at the intersection, with fixed objects, with other district vehicles Passenger Incidents happen with METRO passengers either while boarding a bus, on board a bus, or alighting (descending) a bus. Data presented is by Quarter, for the current quarter, previous quarter, and the current quarter for the last fiscal year. 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)
Reliability	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. 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). Data presented is by Quarter, for the current and past two fiscal years.

KPI Metric Descriptions & Importance, con't

Metric	Description & Importance
Dependability	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. 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. 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

Historical Metrics

Metric	FY19	FY20	FY21	FY22	FY23	YTD FY24
Farebox Recovery	22.7%	24.1%	11.2%	16.6%	18.6%	19.8%
Fixed Route/Commuter Cost/RSH	211	270	298	271	247	262
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	14,065
Monthly Mean Miles Between Chargeable Road Calls - Highway 17	23,043	24,126	18,821	21,682	23,226	10,900
Monthly Mean Miles Between Chargeable Road Calls - ParaCruz	44,221	44,329	29,869	34,168	32,107	36,324
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	1,183,953
Annual Road Miles - Highway 17	627,207	540,859	324,281	373,984	403,492	224,740
Annual Road Miles - ParaCruz	601,229	531,951	373,748	503,650	505,399	241,190