



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

**FOR 2nd Quarter through December 31, 2024**

Board of Directors

*February 28, 2025*

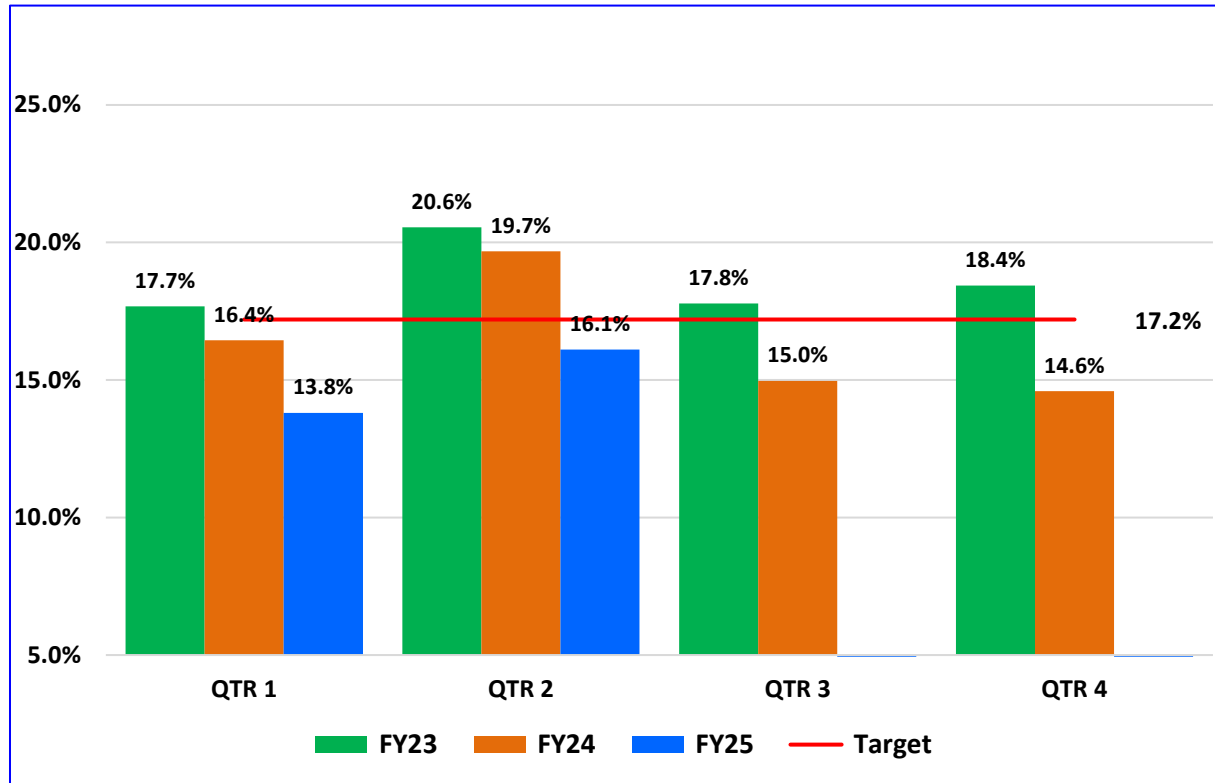
Chuck Farmer, Chief Financial Officer

# 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**

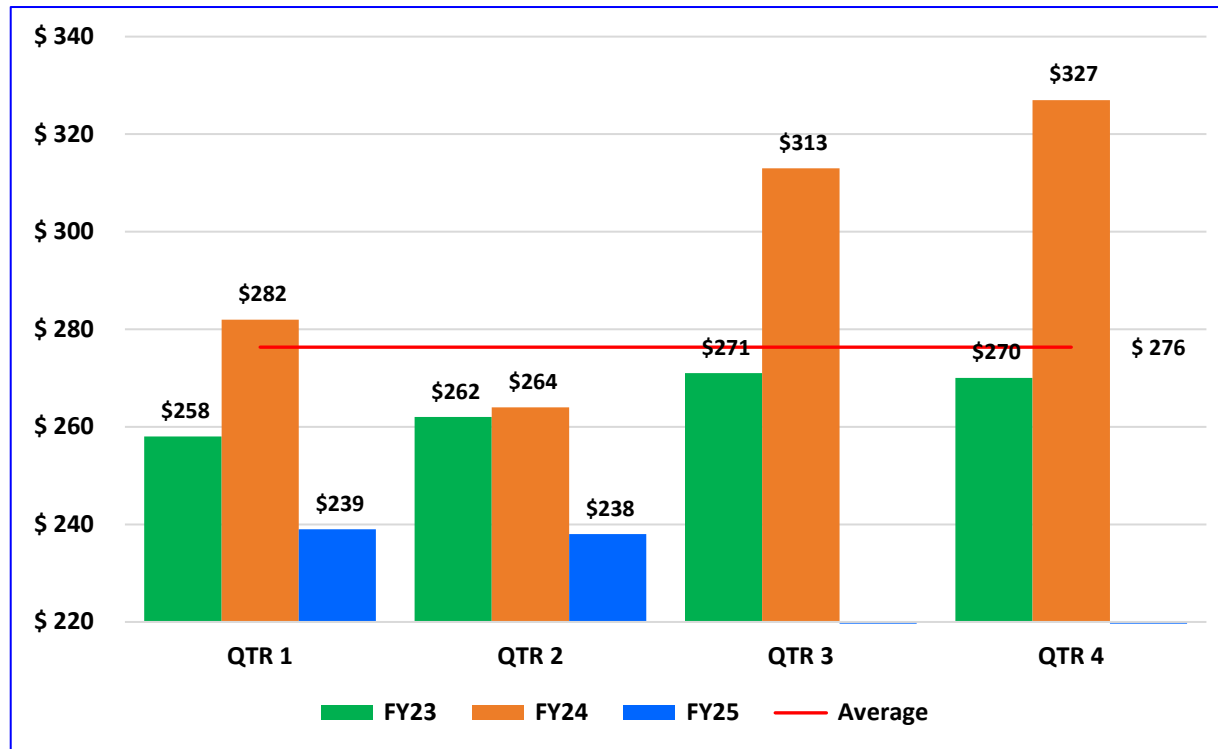
# System Farebox Recovery:



- Q2 FY25 Farebox Recovery decline of 3.6% when compared to Q2 FY24 due to the increase in FTEs (Bus Operators) during the implementation of phase 1 and 2 of the Reimagine Metro, which 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

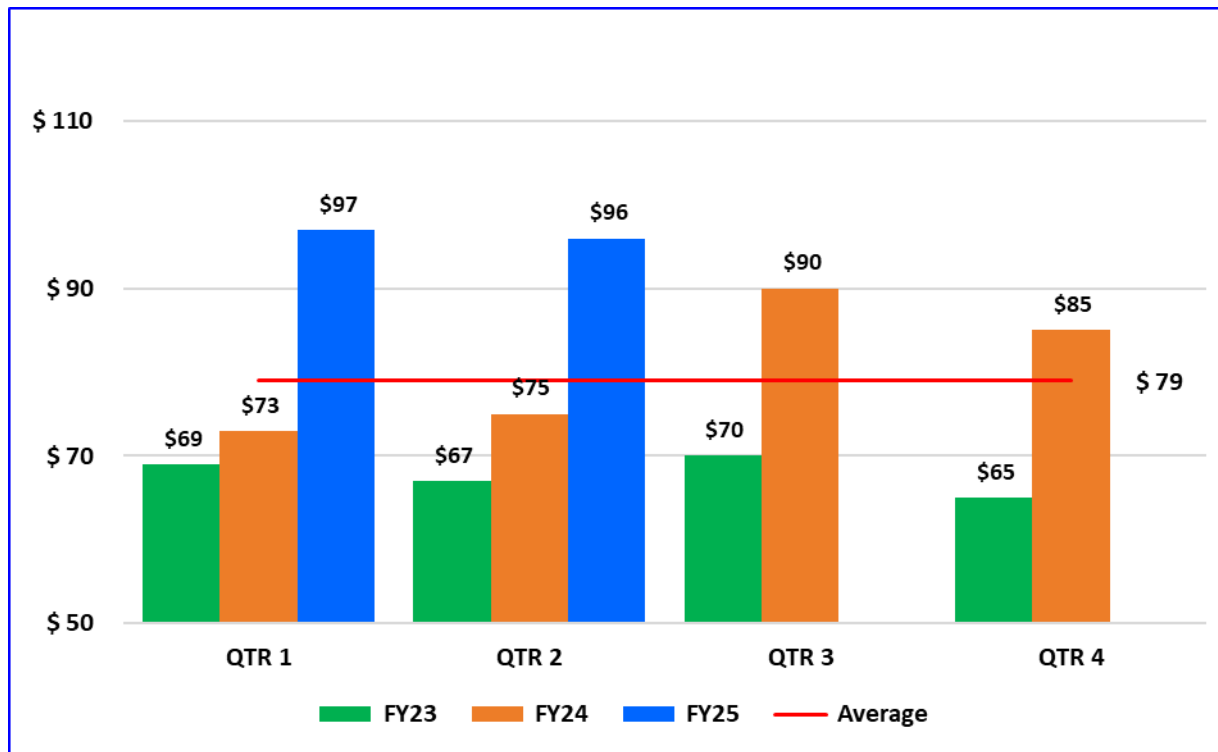
## Fixed Route/Commuter Cost per RSH



- Q2 FY25 Cost per RSH is lower by \$26, over prior year Q2 FY24 due to an increase in service hours of 19,028 or 40.5%

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

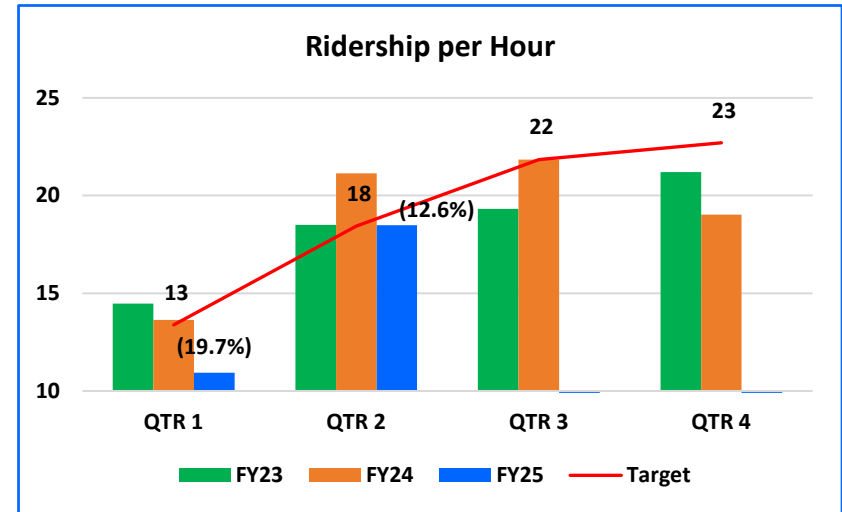
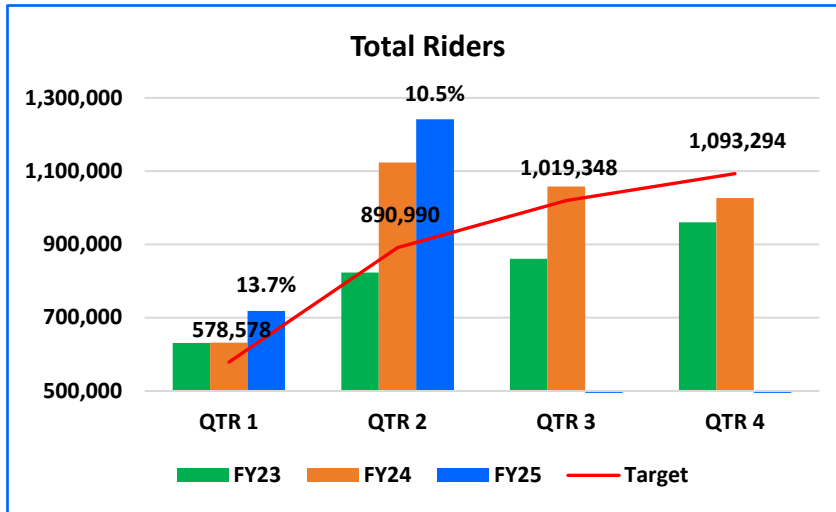


- Q2 FY25 Cost per Trip increased \$21 over prior year due to a decline in trips of 2,724, or 14.6%, primarily due to outsourcing the eligibility process which has resulted in fewer qualified applicants, along with an increase in costs of 9.2% primarily due to 6 additional FTEs (Van Operators) compared 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	QTR 2			
	FY25	FY24	Variance	YoY Change
Local/Non-Student	368,249	278,462	89,787	32.2%
Student (UCSC, Cabrillo, K-12)	834,164	810,867	23,297	2.9%
Highway 17	39,425	34,781	4,644	13.4%

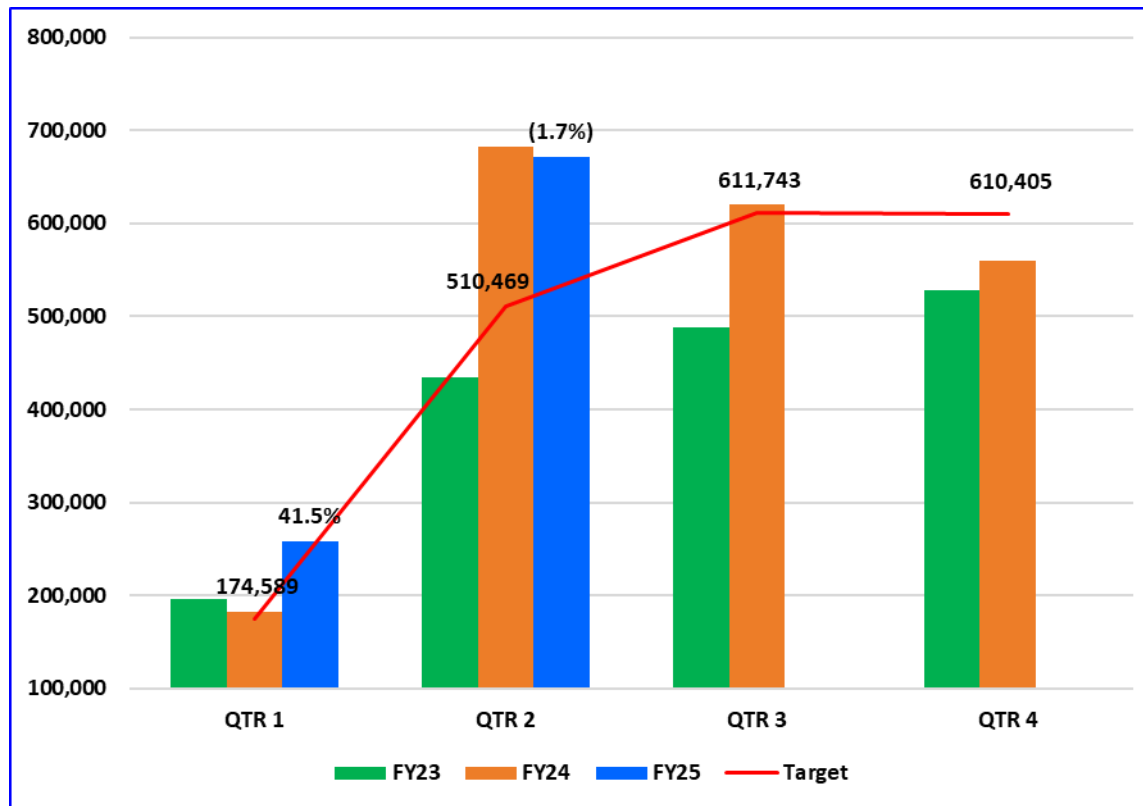
Ridership	QTR 2			
	FY25	FY24	Variance	YoY Change
UCSC	671,239	682,648	(11,409)	(1.7%)
Cabrillo	71,795	49,193	22,602	45.9%
Youth	91,130	79,026	12,104	15.3%

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

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



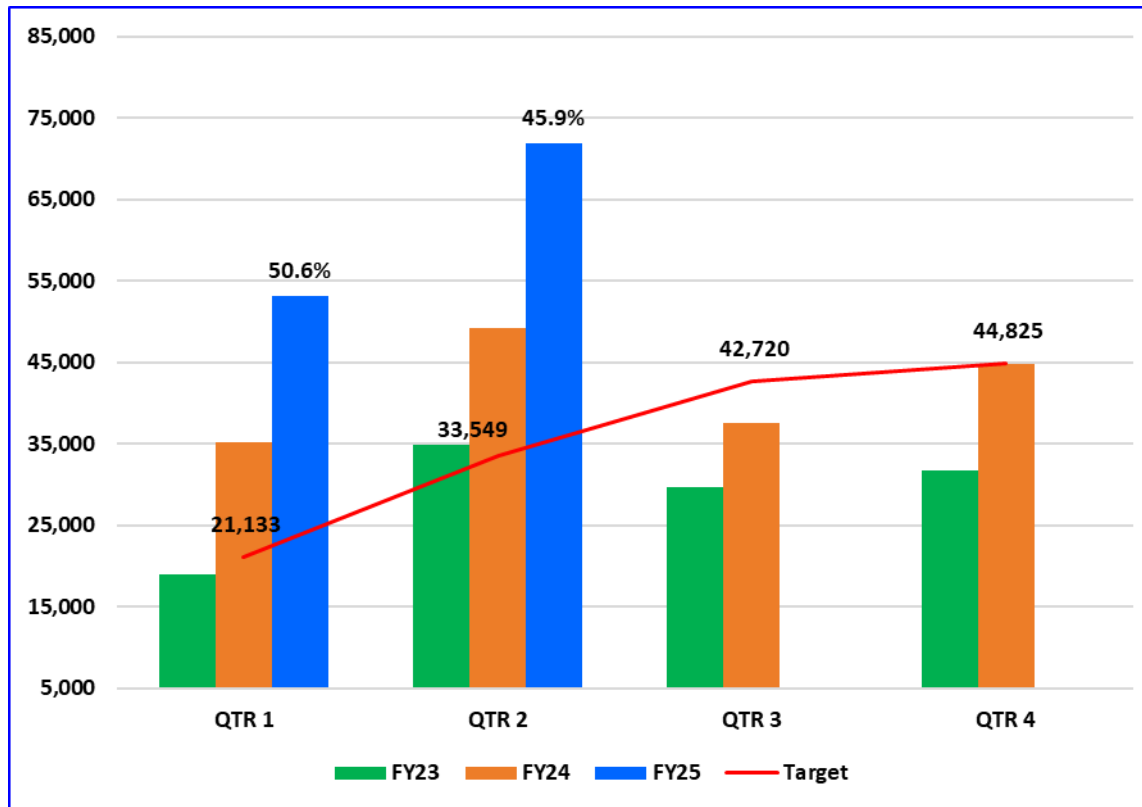
# UCSC Ridership



- Q2 Ridership decreased 11,409, or (1.7%), due to a UCSC labor strike on November 20-21 and an increase in cancelled trips on Route 16 due to bus shortages and the transition from using GFI to Clever APC data to collect UCSC ridership data

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

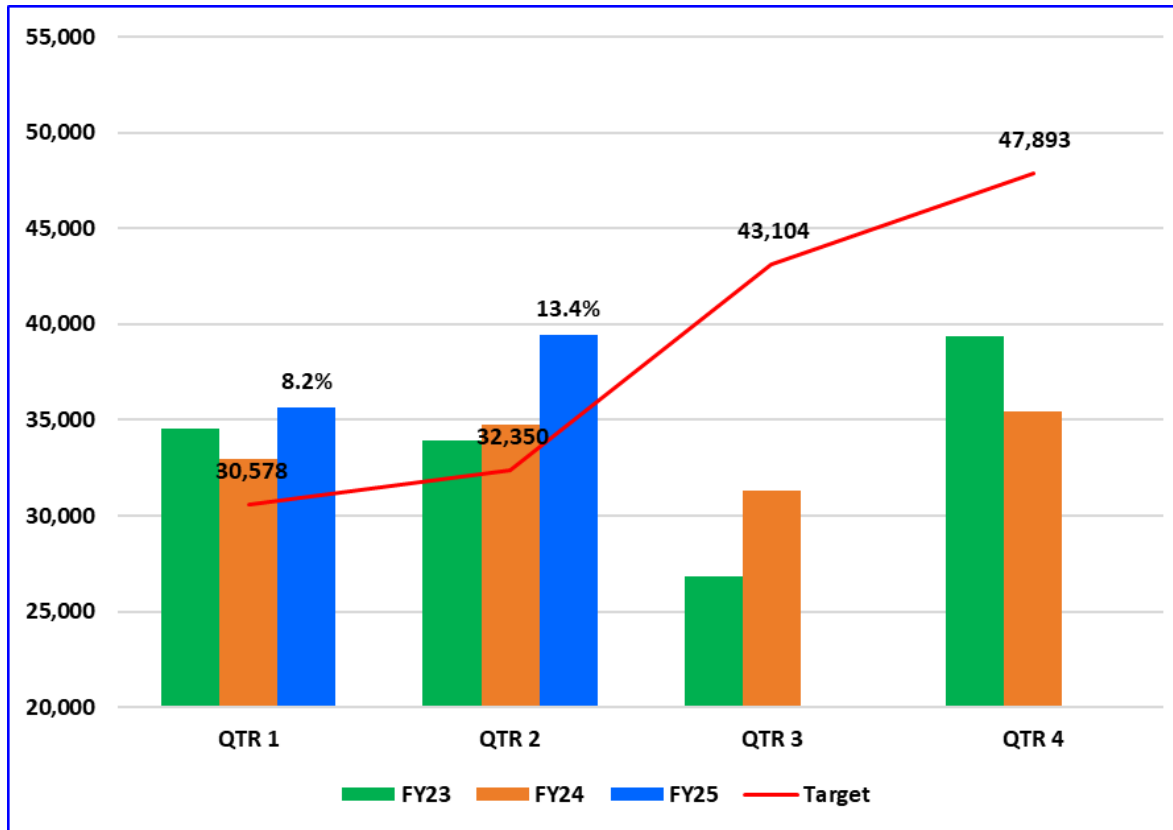
# Cabrillo College Ridership



- Q2 Ridership increased 22,602, or 45.9% due to fall 2024 student enrollment increase of 10% compared to fall 2023 with 15,397 first-time-in-college students enrolled.

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

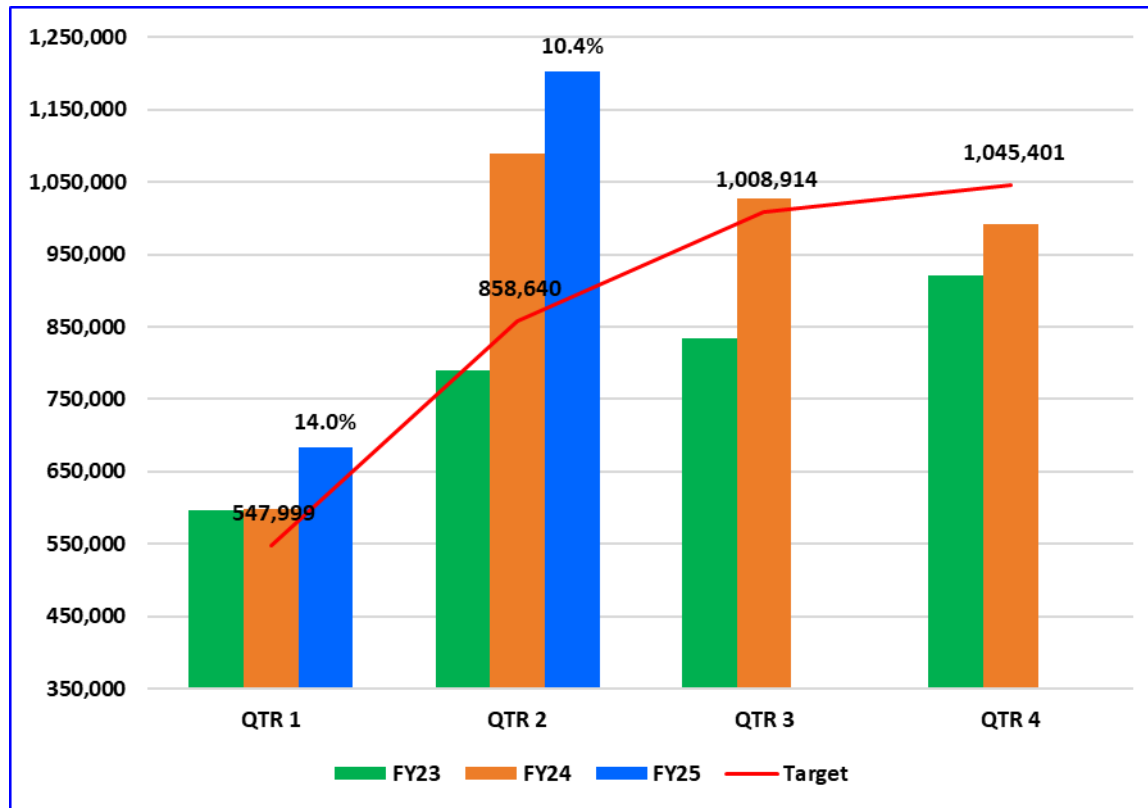
# Highway 17 Ridership



- Q2 Ridership increased 4,644, or 13.4% compared to Q2 FY24. METRO operated 24.1% more vehicle revenue hours over prior year Q2.

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

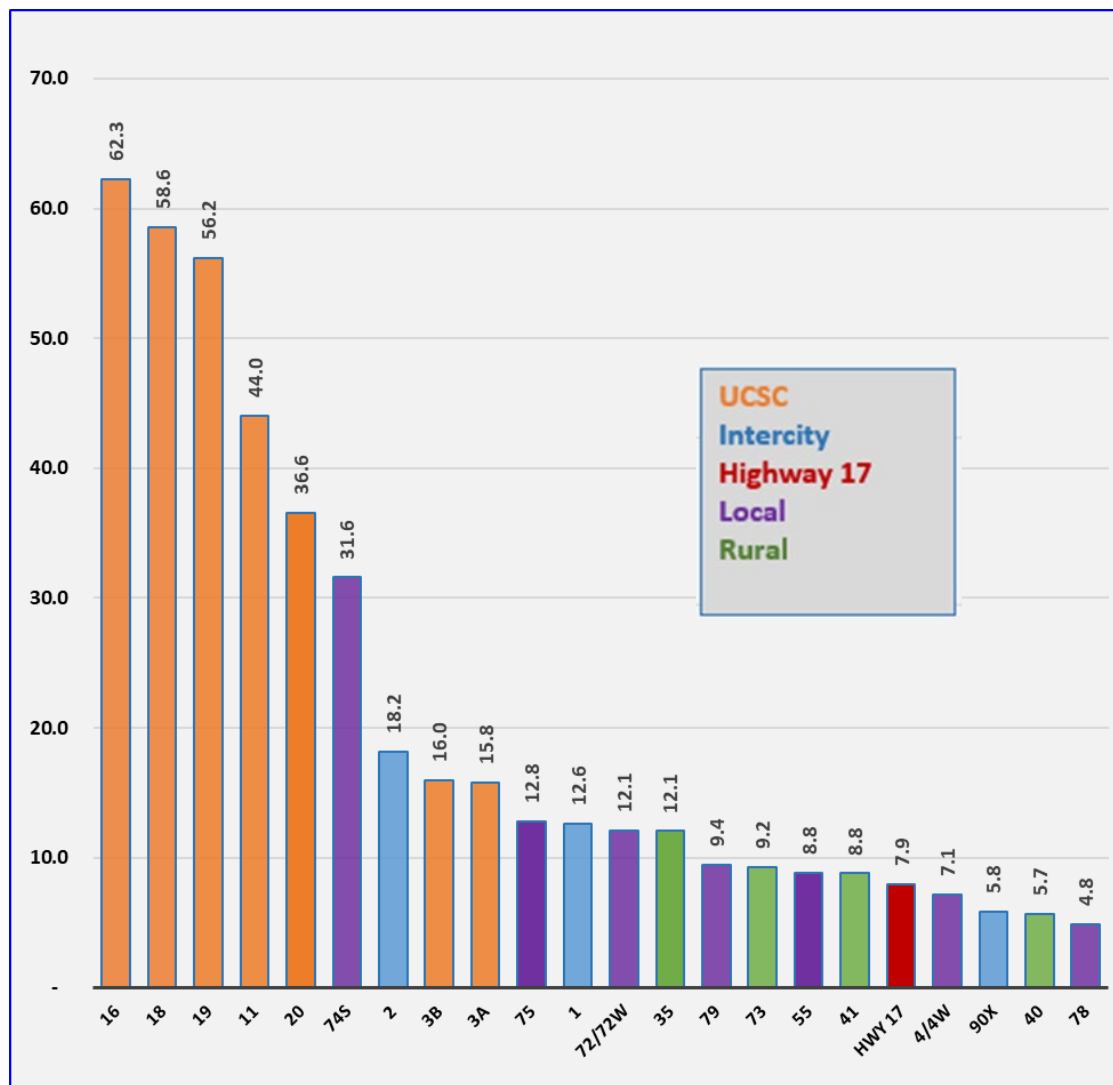
# Local Ridership



- Q2 Ridership increased 113,084, or 10.4% over prior year Q2
  - . UCSC – (1.7%) decrease
  - . Cabrillo – 45.9% increase
  - . K-12 – 15.3% increase

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

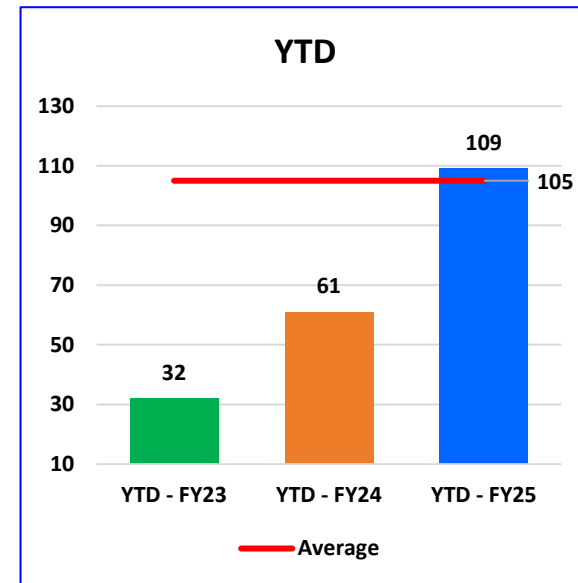
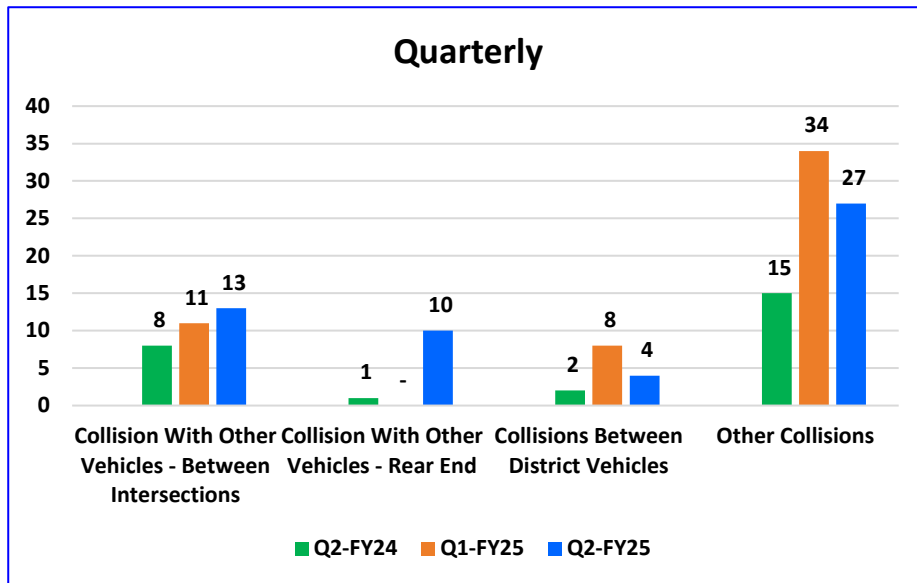
# YTD FY25 Passengers/Service Hours by Route



- Total Passengers/Service Hours were 20.9
- Combined UCSC Passengers/Service Hours were 45.6
- Combined Intercity Passengers/Service Hours were 13.4
- Combined Rural Passengers/Service Hours were 10.7
- Combined Local Passengers/Service Hours were 9.7
- Combined Highway 17 Passengers/Service Hours were 7.9

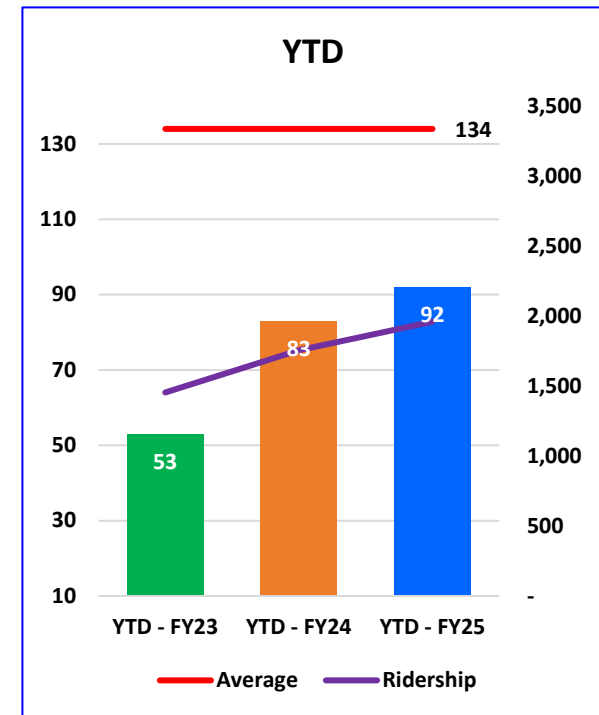
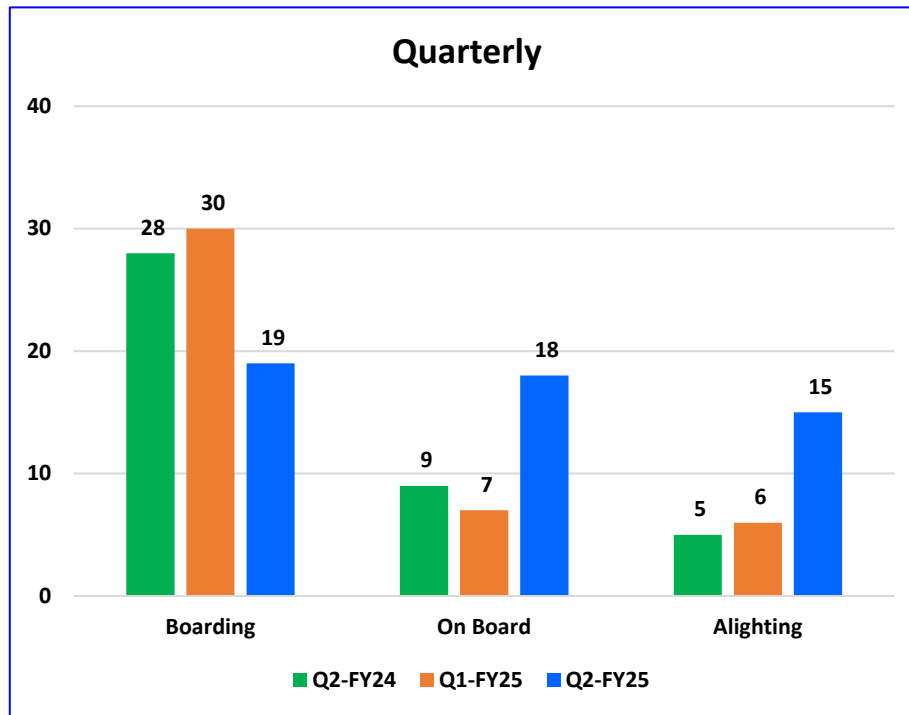
# **Risk Management & Safety KPI's**

# Traffic Accidents



- Total Traffic Accidents in Q2 FY25 increased by 1 (1.9%) over Q1 FY25 and increased by 28 (107.7%) from a year ago, Q2 FY24
- Collisions with Other Vehicles (between intersections) for Q2 FY25 increased by 2 (18.2%) over Q1 FY25 and increased by 5 (62.5%) from a year ago, Q2 FY24
- Collisions with Other Vehicles (Rear End) for Q2 FY25 increased by 10 (1000%) over Q1 FY25 and by 9 (900%) from a year ago, Q2 FY24
- Collisions Between (District Vehicles) for Q2 FY25 decreased by 4 (400%) over Q1 FY25 and increased by 2 (200.0%) from a year ago, Q2 FY24
- Other Collisions for Q2 FY25 decreased by 7 (20.6%) over Q1 FY25 and increased by 12 (80.0%) from a year ago, Q2 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)

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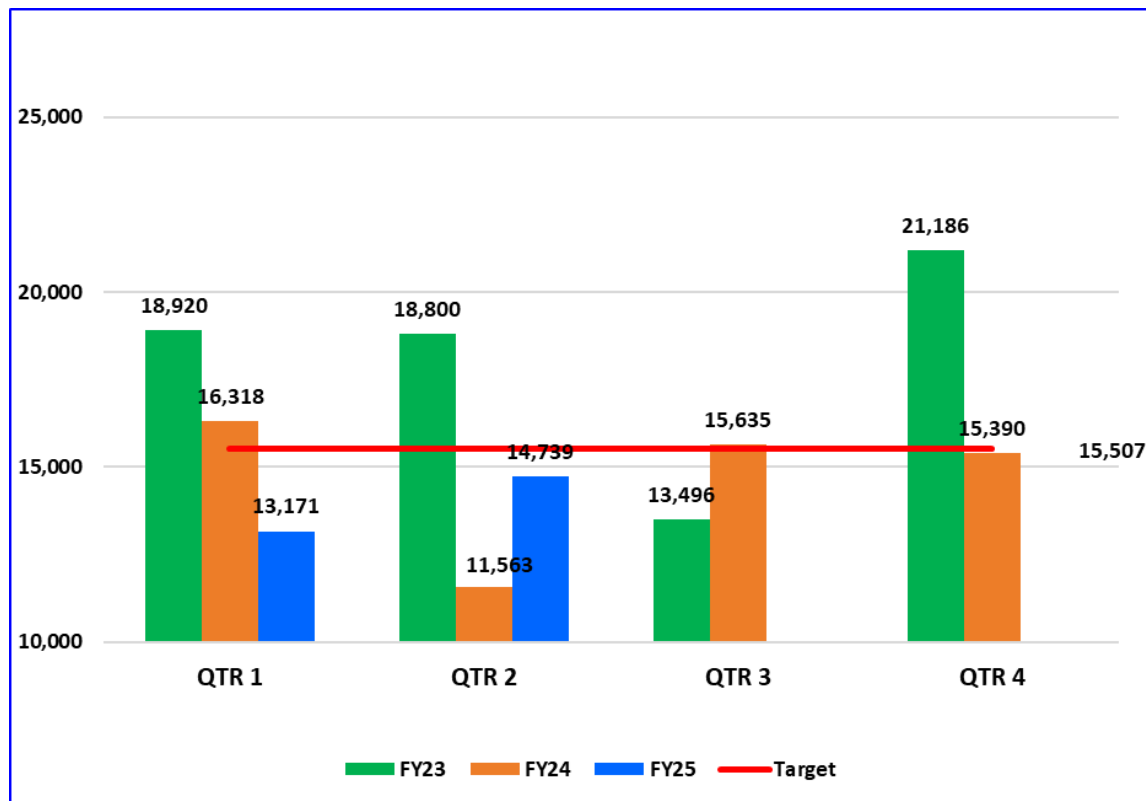
- Most boarding incidents occur when the passengers are using cell phones, not paying attention, or sleeping.
- Safety, Fleet Maintenance, and Information Technology departments are collaborating to identify further methods to reduce the number of incidents.
- YTD Ridership numbers are 1,454,679, 1,755,998, and 1,960,395 respectively for FY23, FY24, and FY25

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



# **Reliability KPI's**

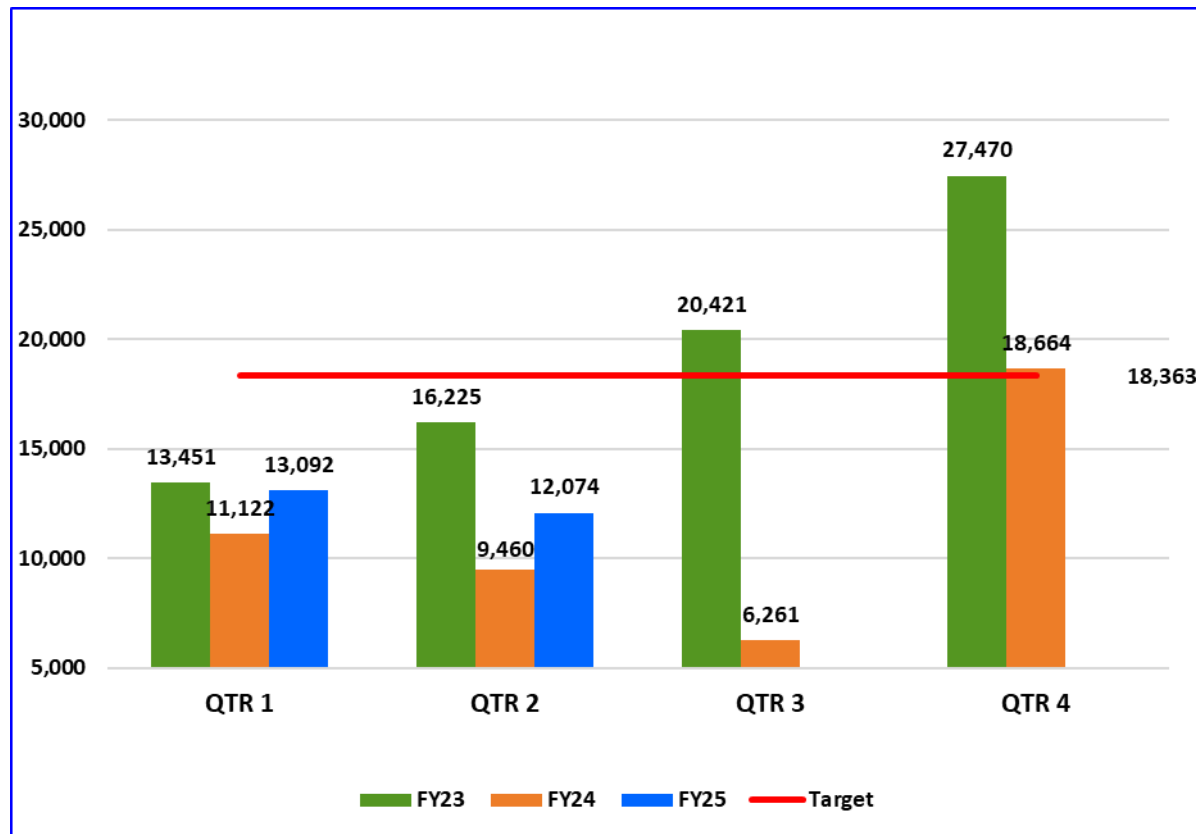
## Mean Miles Between Chargeable Road Calls – Fixed Route (Local)



- Q2 FY25 mileage between calls increased by 3,176 in correlation with increases of miles by 315,729 and road calls by 10 compared to the same time period in FY24
- Chargeable road calls in Q2 FY25 were 28 in October, 29 in November, and 16 in December

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

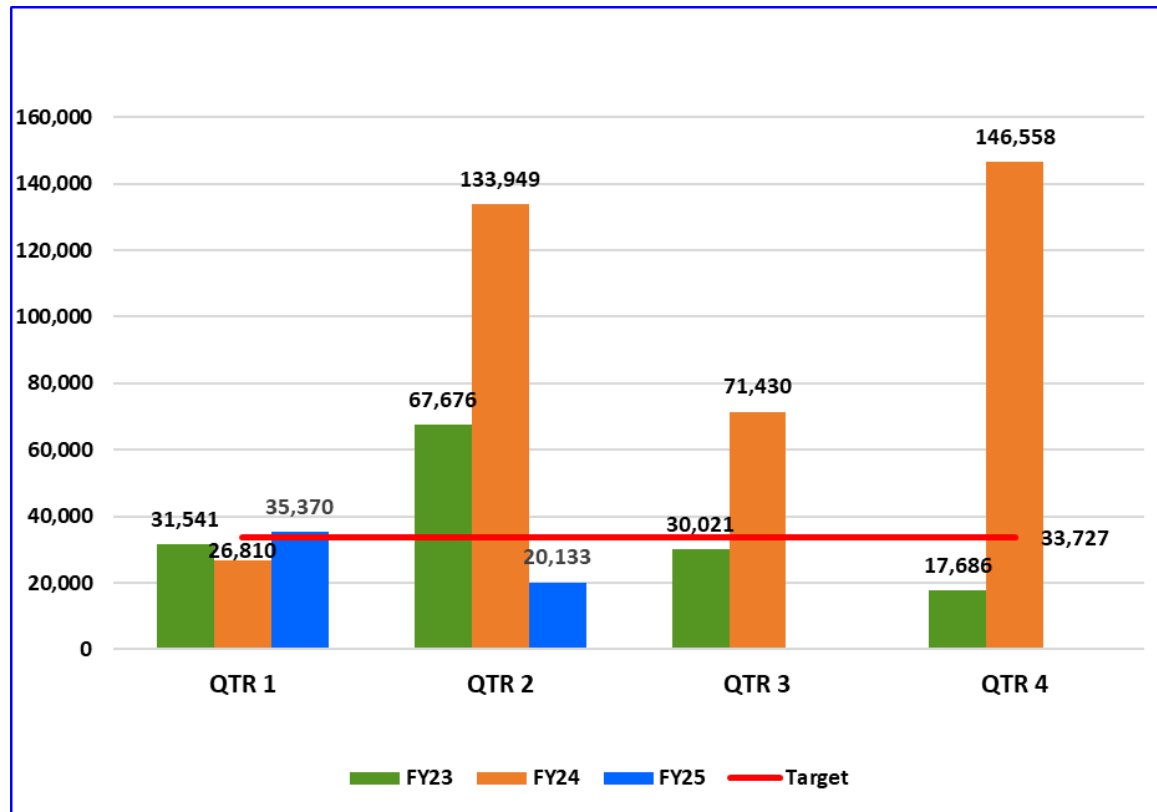
# Mean Miles Between Chargeable Road Calls – Highway 17



- Q2 FY25 mileage between calls increased by 2,614 in correlation with increases of miles by 55,513 and road calls by 2 compared to the same time period in FY24
- Chargeable road calls in Q2 FY25 were 4 in October, 5 in November, and 5 in December

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

# Mean Miles Between Chargeable Road Calls – ParaCruz

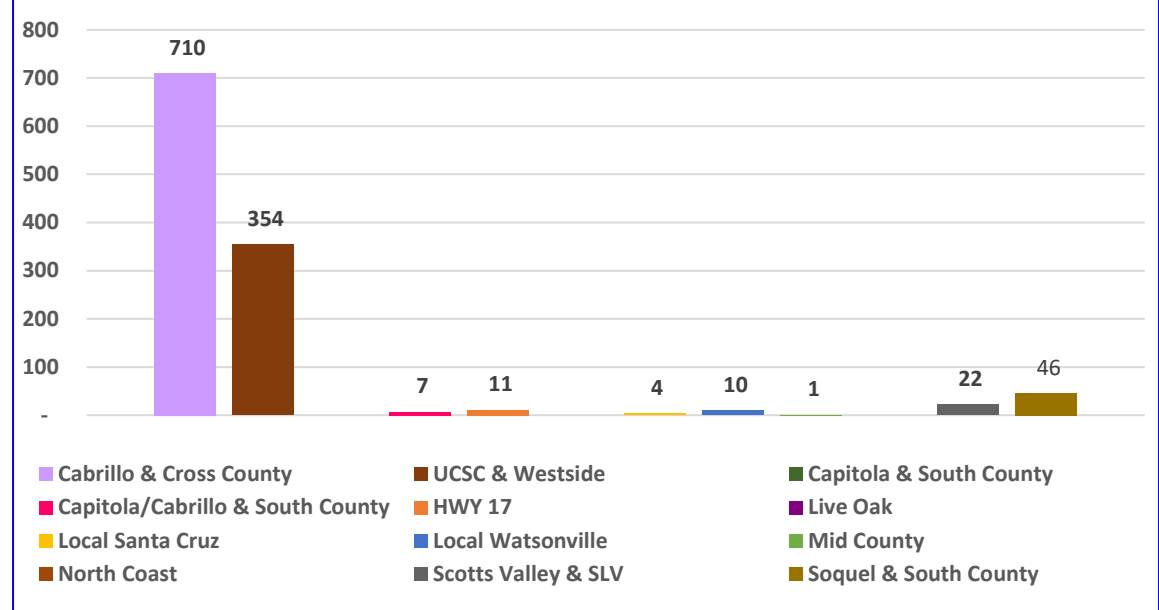
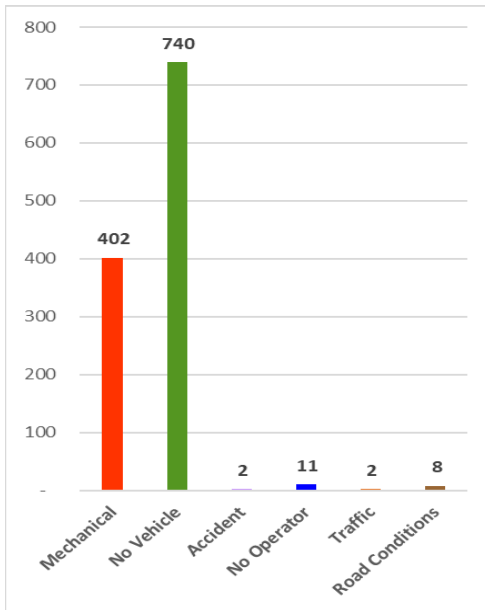


- Q2 FY25 mileage between calls decreased by 113,816 while road calls increased by 6. Average mileage is derived by total miles divided by road calls and only 1 road call in Q2 FY24, resulting in a high variance compared to current Q2
- Chargeable road calls in Q2 FY25 were 3 in October and November, and 1 in December

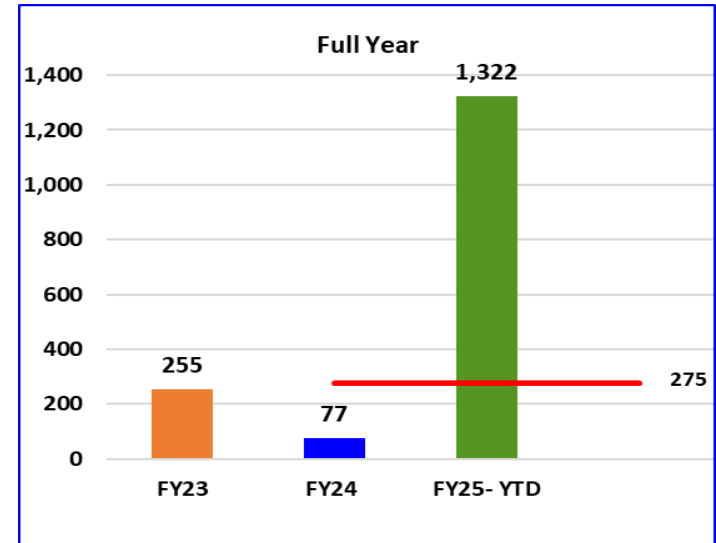
The current target of 33,727 is based off a 3-year average (FY21, FY22, FY23)

# **Dependability KPI's**

# Cancelled Trips by Cause & Region

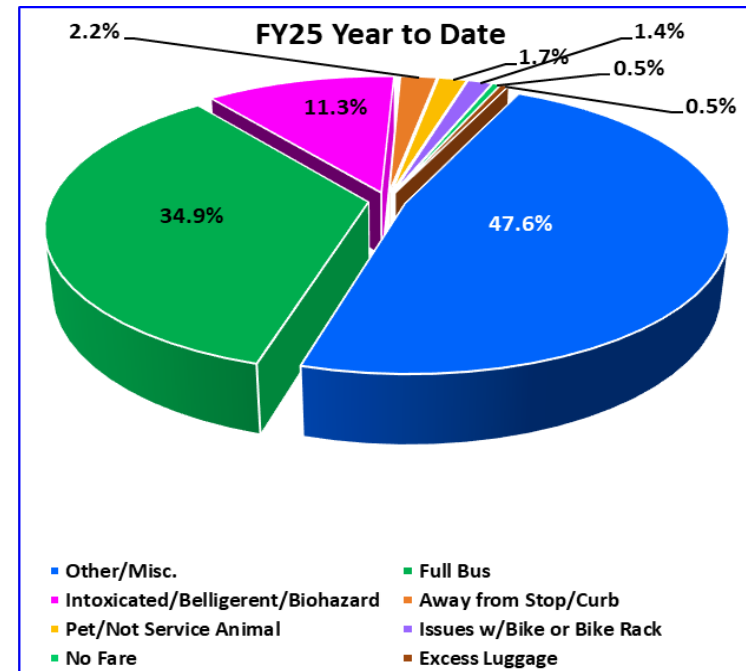
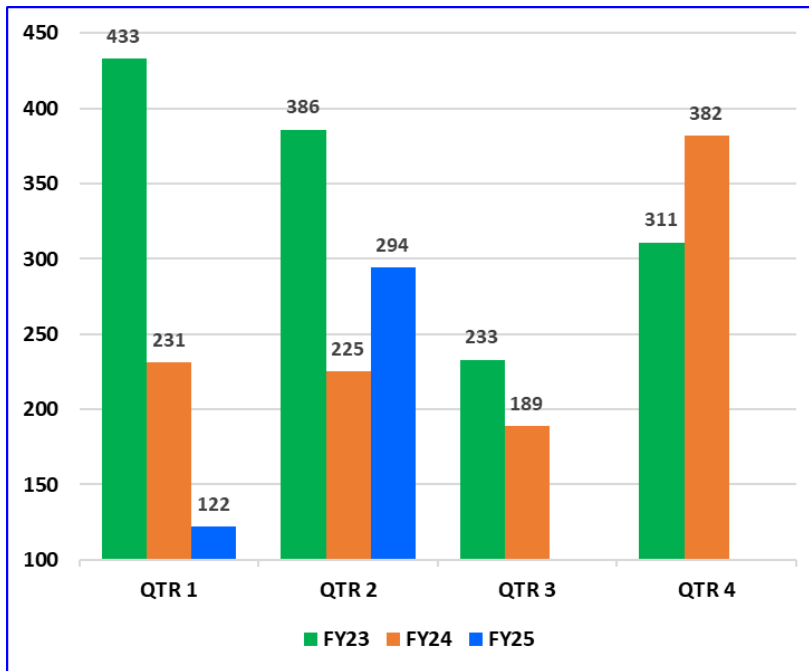


- There were 1165 cancelled trips in Q2 FY25 – 121 in October, 128 in November and 916 in December primarily due to no vehicle and mechanical issues
- Nine regions were impacted – Cabrillo & Cross County, UCSC & Westside, Capitola/Cabrillo & South County, HWY 17, Local Santa Cruz, Local Watsonville, Mid County, Scotts Valley & SLV, and Soquel & South County



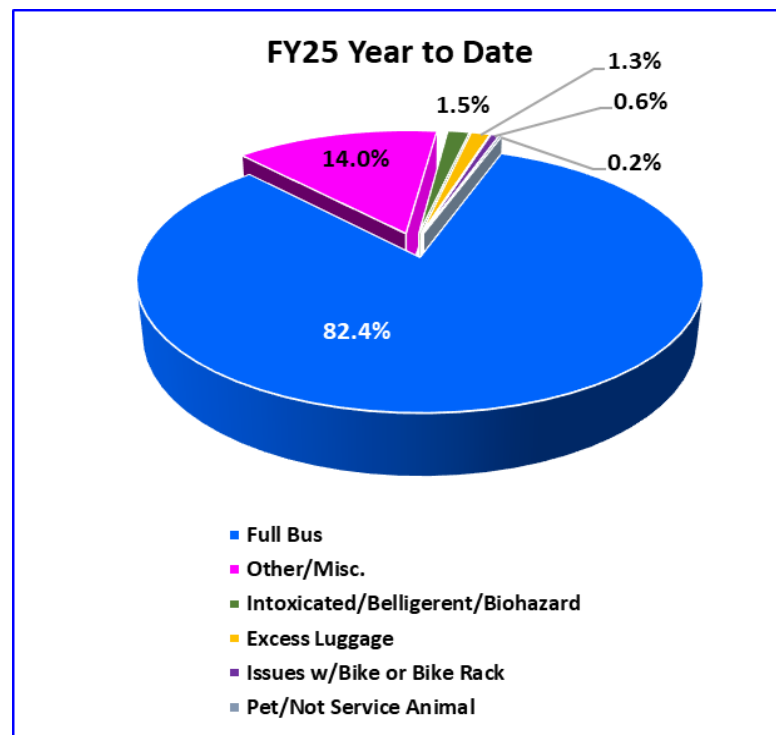
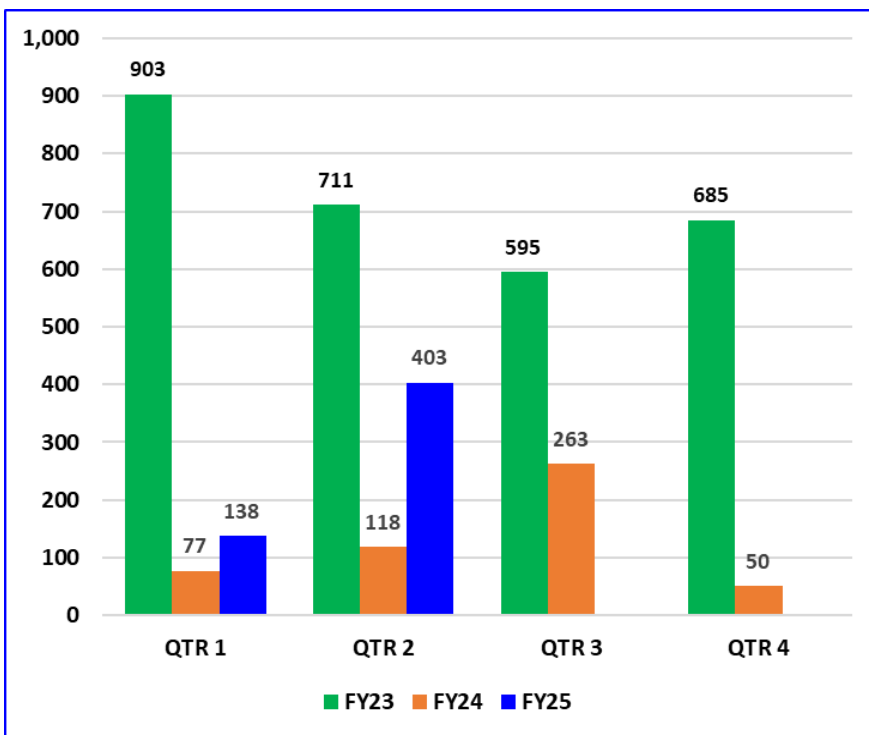
Full year average of 275 is based 3-year average (FY22, FY23, FY24)

# Pass-Ups by Quarter/Reason – Fixed Route



- In Q2 FY25, total pass-ups were 294, which is 69 (30.7%) higher when compared to Q2 FY24
- October had an increase of 45 pass-ups (54.2%), November had a decrease of 11 (13.4%), and December had an increase of 35 (58.3%) when compared to the same time period as FY24
- 47.6% of Year-to-Date total pass-ups are caused by Other/Misc, which covers a wide range of issues (such as Surfboards, No Shoes, Smoking/Vaping, and Hygiene to name a few), followed by 34.9% full bus capacity, and 11.3% due to Intoxicated/Belligerent/Biohazard, all other categories are less than 2.2%

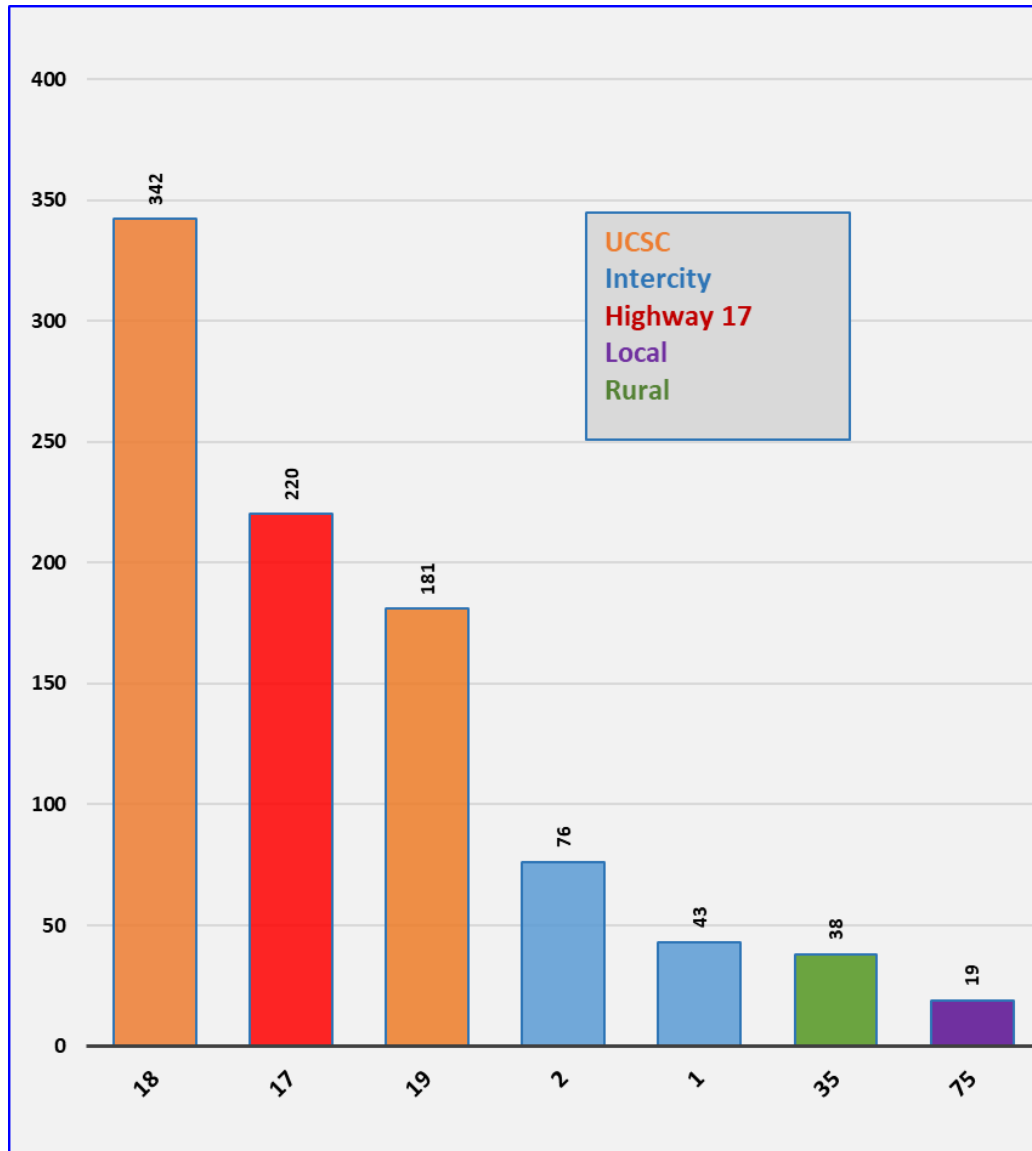
# Pass-Ups by Quarter/Reason - UCSC



- In Q2 FY25, total pass-ups were 403, which is 285 (241.5%) higher when compared to Q2 FY24
- There were increases across all months - October 264 pass-ups (432.8%), November 12 (44.4.%), and December 9 (30.0%) when compared to the same time period as FY24
- 82.4% of Year-to-Date total pass-ups are caused by full bus capacity, followed by 14.0% caused by other/Misc., all other categories are less than 1.5%



## YTD FY25 Pass-Ups by Route\*



- YTD Pass-ups total 957
- UCSC Routes comprised 541 (56.5%), of which 82.4% were due to full bus capacity
- Highway 17 Routes comprised 220 (23.0%), of which 57.7% were due to full bus capacity
- Intercity Routes comprised 127 (13.3%), of which 59.1% were due to Other/Misc.
- Rural Routes comprised 45 (4.7%), of which 40.0% were due to full bus capacity
- Local Routes comprised 24 (2.5%), 87.5% 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 <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	FY20	FY21	FY22	FY23	FY24	YTD FY25
Farebox Recovery	24.1%	11.2%	16.6%	18.6%	16.2%	16.1%
Fixed Route/Commuter Cost/RSH	211	298	271	247	296	238
ParaCruz Cost/Trip	72	181	91	69	80	96
Monthly Mean Miles Between Chargeable Road Calls - Fixed Route	13,216	13,695	15,401	17,602	14,494	13,908
Monthly Mean Miles Between Chargeable Road Calls - Highway 17	24,126	18,016	18,699	18,341	9,959	12,564
Monthly Mean Miles Between Chargeable Road Calls - ParaCruz	44,329	53,393	29,626	29,729	66,326	25,674
Annual Road Miles - Fixed Route	2,443,157	1,999,474	2,325,531	2,358,618	2,594,510	1,863,663
Annual Road Miles - Highway 17	562,616	324,281	373,984	403,492	468,091	339,220
Annual Road Miles - ParaCruz	623,119	373,748	503,650	505,399	530,608	282,413