



KEY PERFORMANCE INDICATORS (KPI) REPORT

FOR 3rd Quarter through March 31, 2024

Board for Directors

May 17, 2024

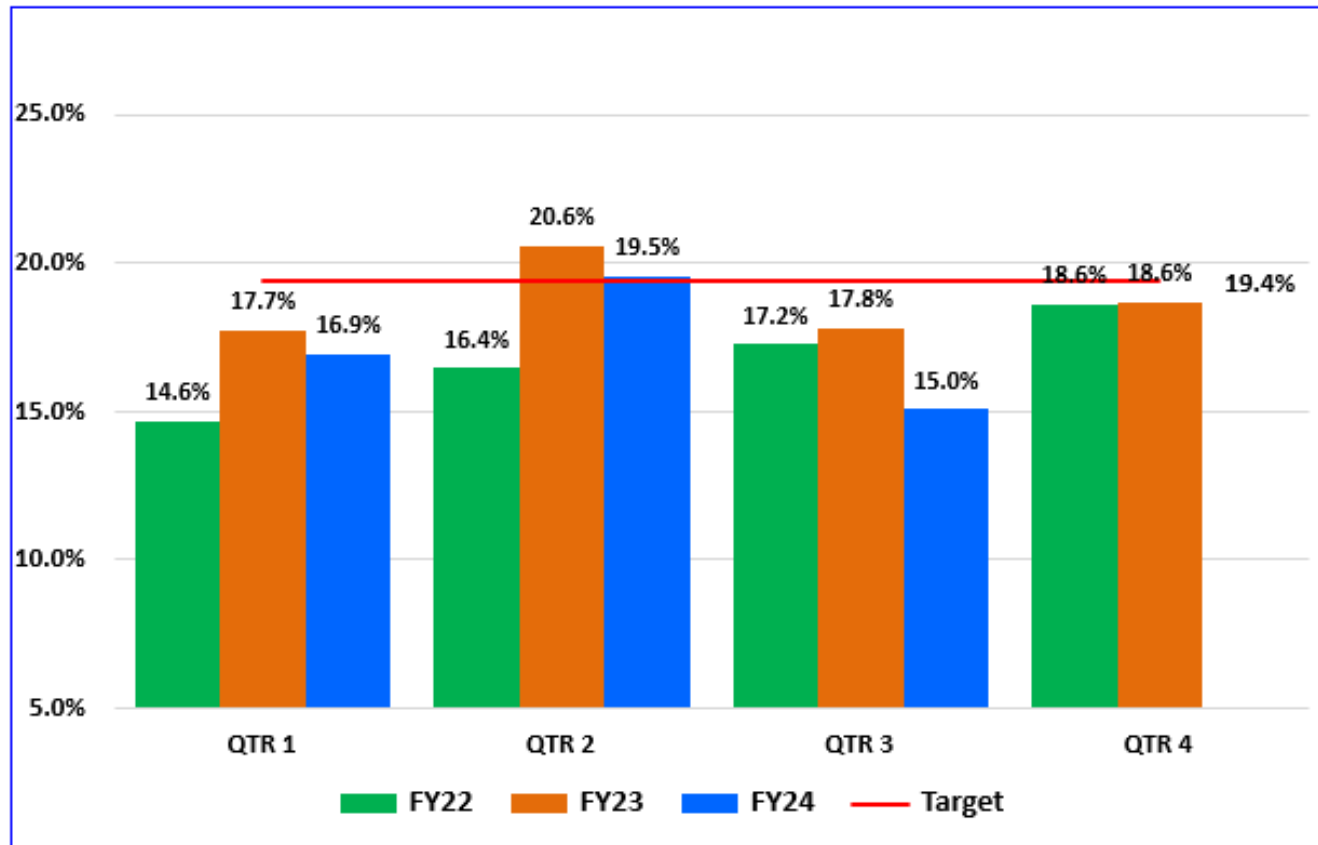
Chuck Farmer, Chief Financial Officer

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

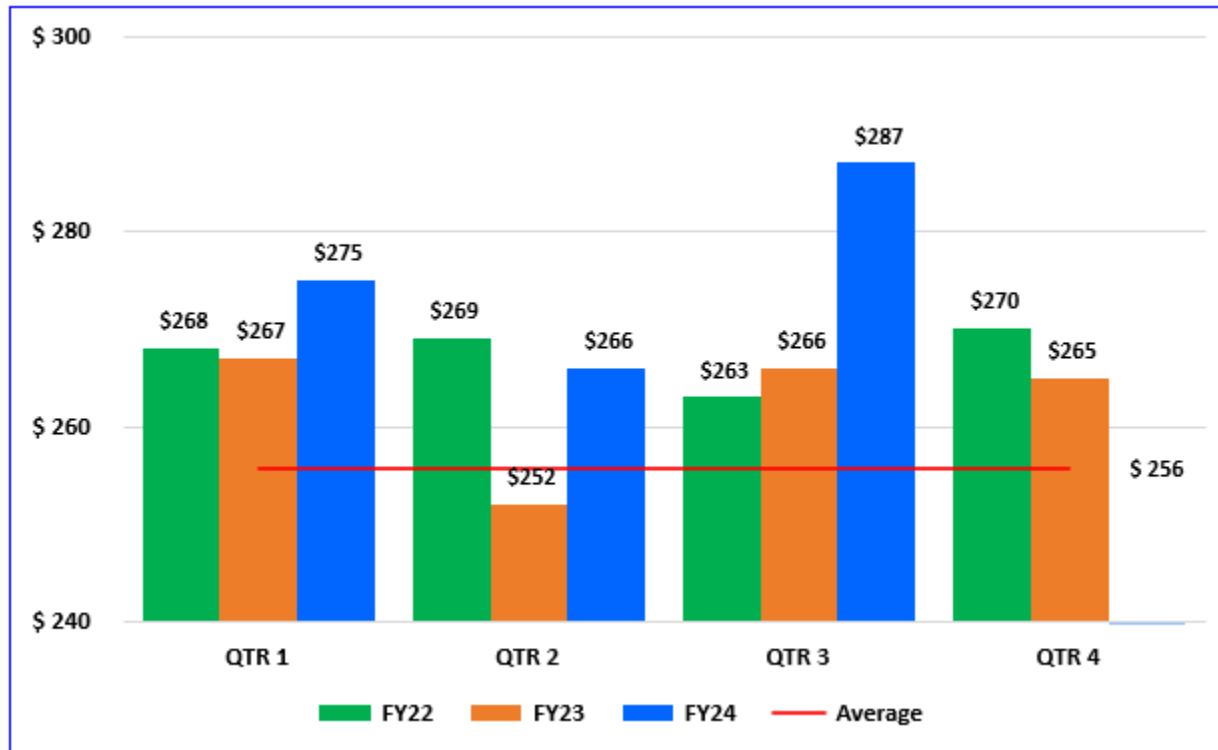
Financial Performance KPI's

System Farebox Recovery:



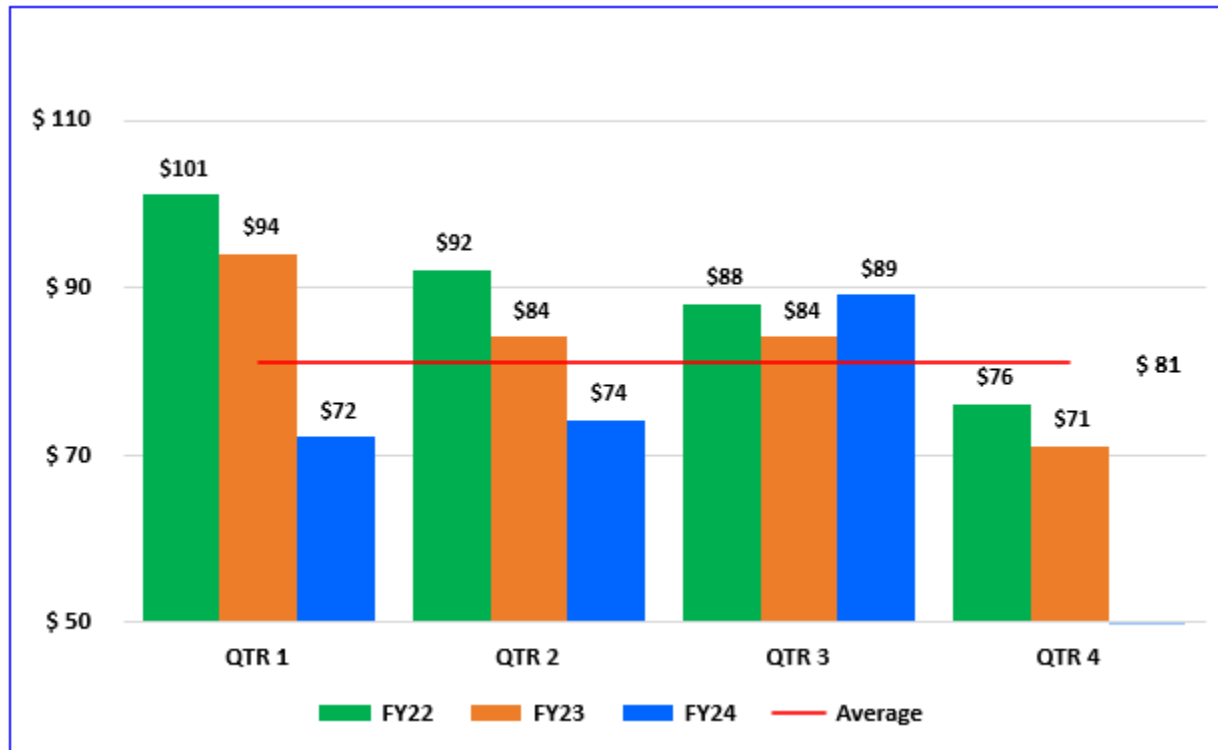
- Q3 FY24 Farebox Recovery is 15.0%, a year-over-year decline of 2.8% primarily due to Youth Free Fares; 4.4% lower than target and 4.5% lower than Q2 FY24 partially due to a decrease Hwy 17 ridership of 10.0% and the 18 days of Free Fares (vs 11 days in Q2) during our highest ridership month for Q3 FY24
- 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



- Q3 FY24 Cost per RSH is \$287, an increase of \$21 over last year's Q3 costs, and \$31 higher than average due to higher labor costs due to an increased number of FTEs in anticipation of planned service expansion
- Revenue Service Hours increased 0.3% along with Fixed Route costs that increased by 15.4% 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)

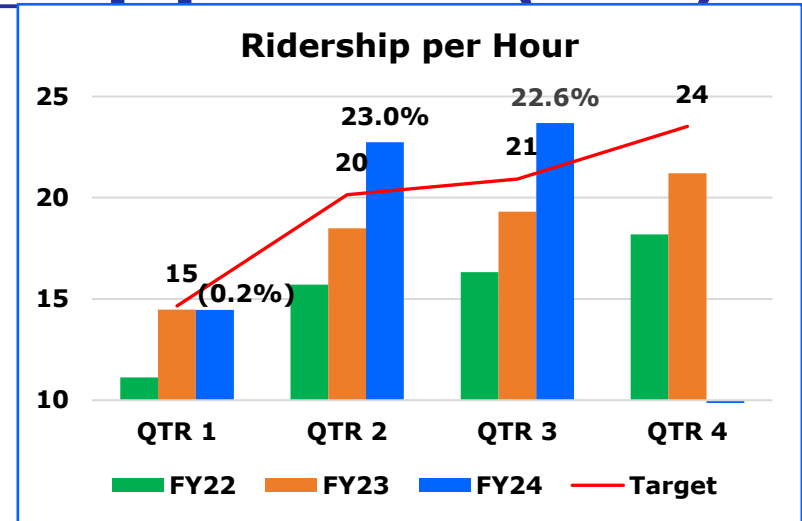
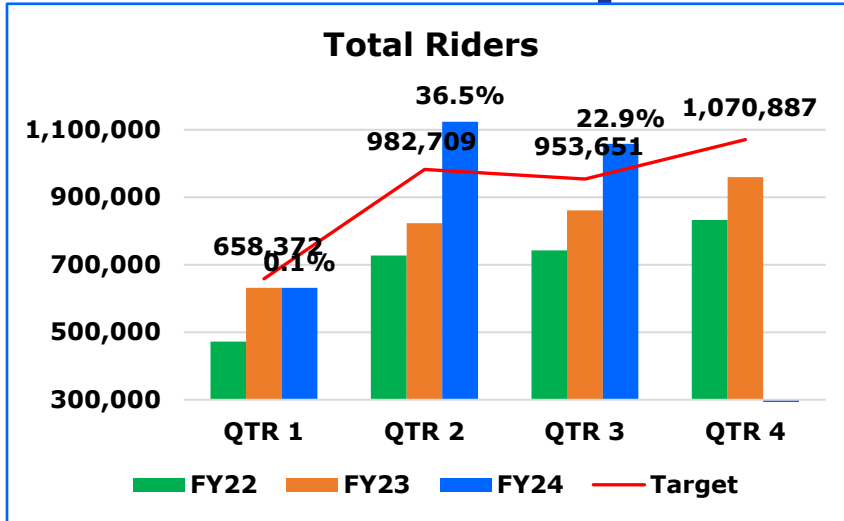
ParaCruz Cost per Trip



- Q3 FY24 Cost per Trip is \$89, a year-over-year deteriorate of \$5, and \$8 higher than average.
- Trips delivered increased 17.5% and costs increased 24.4% 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)

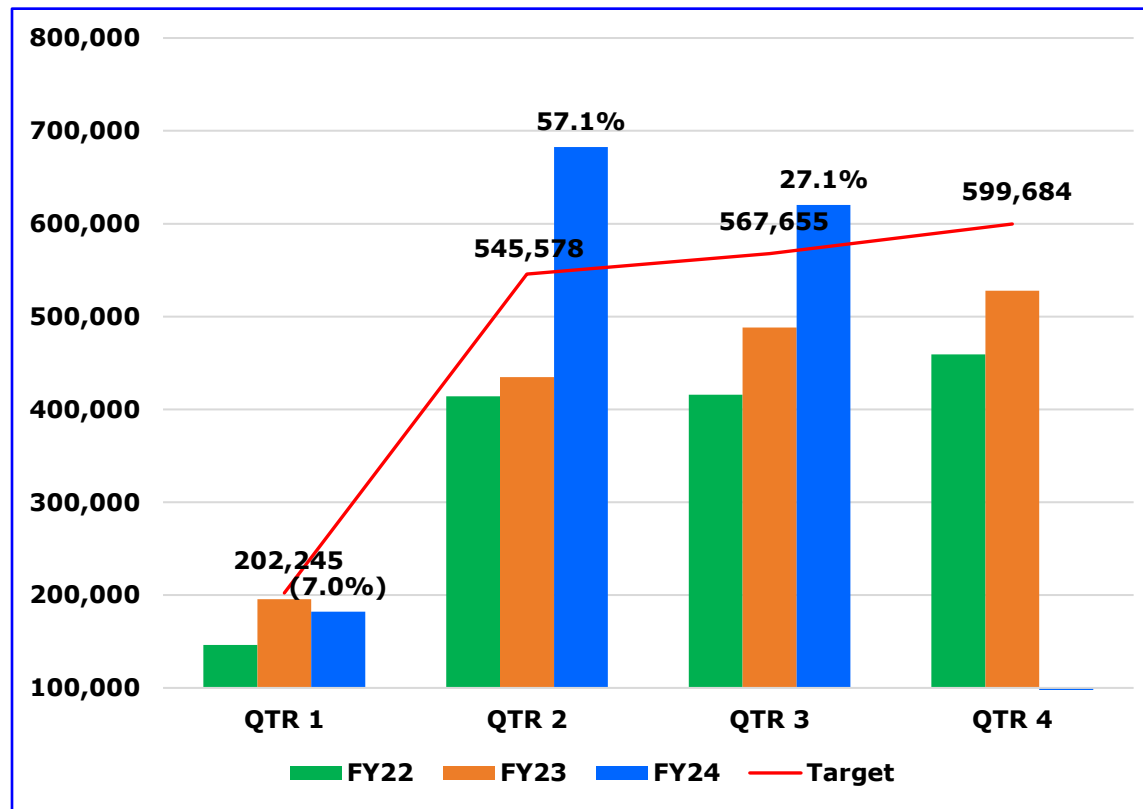
Productivity KPI's

Total Ridership / Ridership per Hour (RPH)



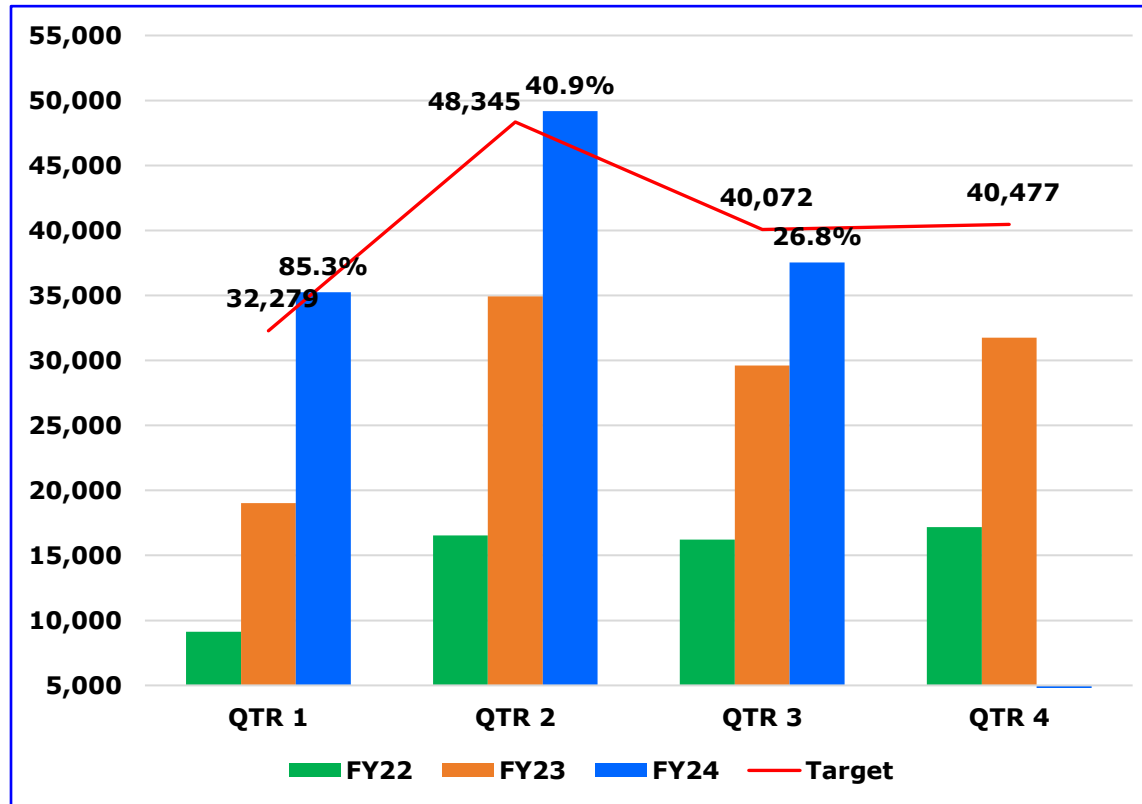
- An 4.1% increase in ridership in local, non-student ridership service over Q3 of FY23
- A 33.1% increase in Student ridership, includes the Youth Ride Free ridership over Q3 of FY23
- A 16.7% increase in Highway 17 ridership over Q3 of FY23
- The Quarterly Ridership Target is based on the average quarterly actuals from FY19, FY22, and FY23 (excludes FY20/FY21 due to COVID impact)
- UCSC ridership increased 27.1% over Q3 of FY23
- Cabrillo ridership increased 26.8% over Q3 of FY23
- Youth ridership increased 147.6% over Q3 of FY23
- 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



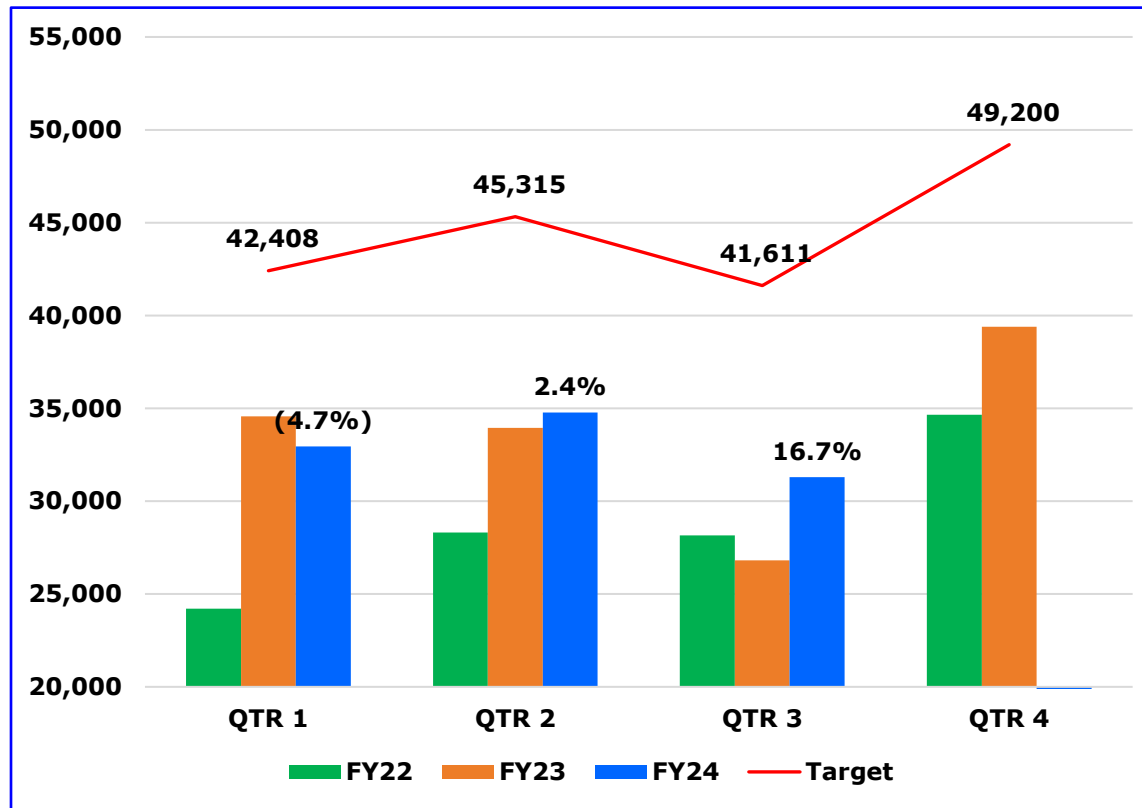
- Q3 Ridership increased 27.1%, a year-over-year as a result of several factors. Additional service was operated on the routes 18 and 19 (implemented in September), fall enrollment and on-campus residency increased 1.5% and 1.1%, respectively
- The Quarterly Ridership Target is based on the average quarterly actuals from FY19, FY22, and FY23 (excludes FY20/FY21 due to COVID impact)

Cabrillo College Ridership



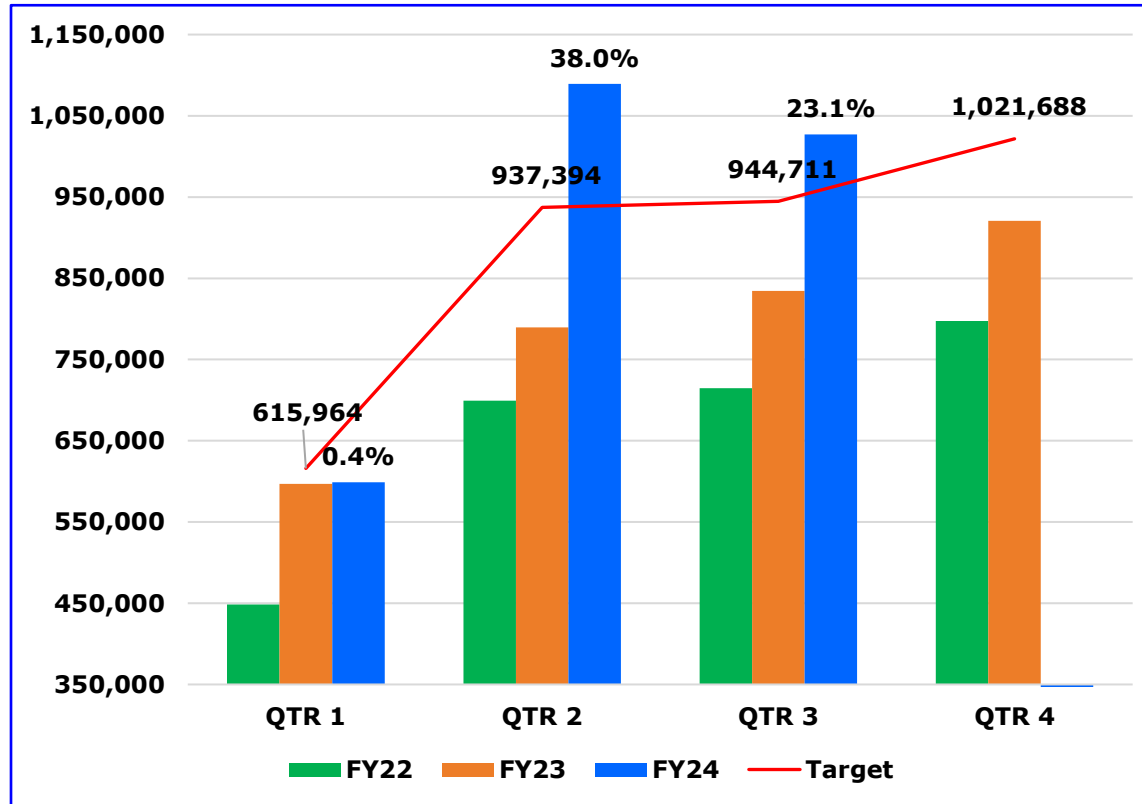
- Q3 Ridership increased 26.8% as more students returned to in-person sessions, though over half of those enrolled were taking online classes, at least part-time. Student enrollment also increased by 0.8%.
- The Quarterly Ridership Target is based on the average quarterly actuals from FY18, FY19, FY22 (excludes FY20/FY21 due to COVID impact)

Highway 17 Ridership



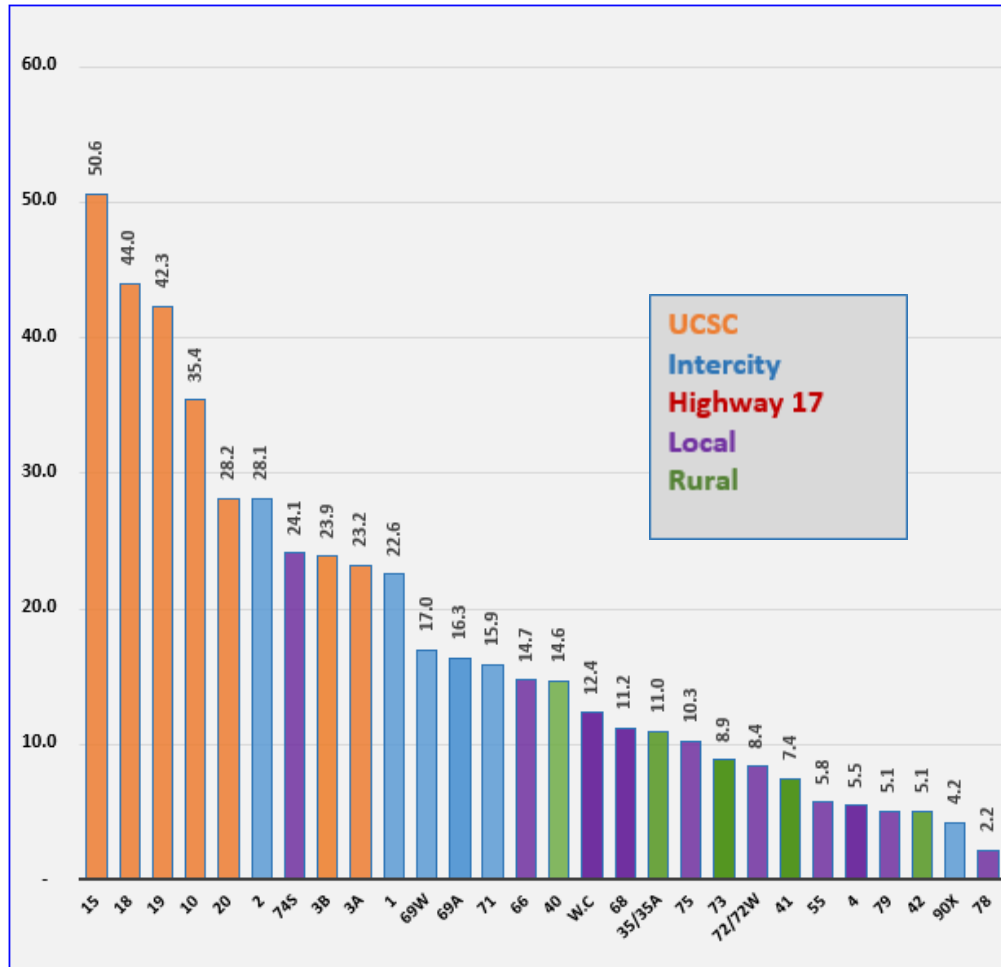
- Q3 Ridership increased 16.7% primarily due to the relative absence of inclement weather this quarter compared to Q3 FY23
- The Quarterly Ridership Target is based on the average quarterly actuals from FY19, FY22, and FY23 (excludes FY20/FY21 due to COVID impact)

Local Ridership



- Q3 Ridership increased 23.1%, which is a direct result of student ridership increased of 33.1%. UCSC, Cabrillo and K-12 ridership also increased 27.1%, 26.8%, and 147.6% respectively
- The Quarterly Ridership Target is based on the average quarterly actuals from FY19, FY22, and FY23 (excludes FY20/FY21 due to COVID impact)

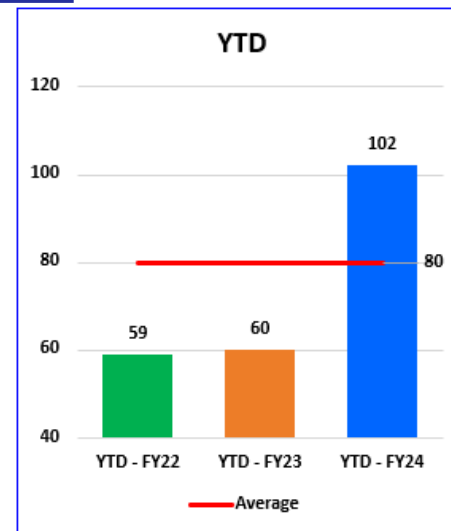
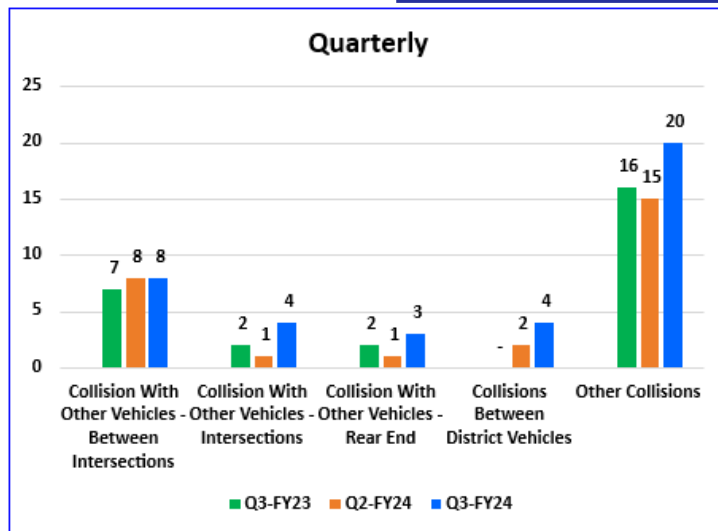
YTD FY24 Passengers/Service Hours by Route



- Total Passengers/Service Hours were 20.5
- Combined UCSC Passengers/Service Hours were 38.4
- Combined Intercity Passengers/Service Hours were 18.1
- Combined Rural Passengers/Service Hours were 10.3
- Combined Local Passengers/Service Hours were 9.6
- Combined Highway 17 Passengers/Service Hours were 8.7

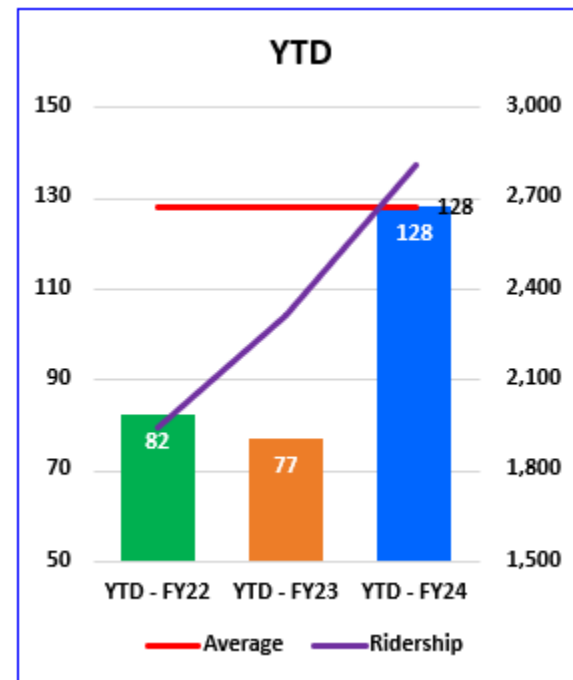
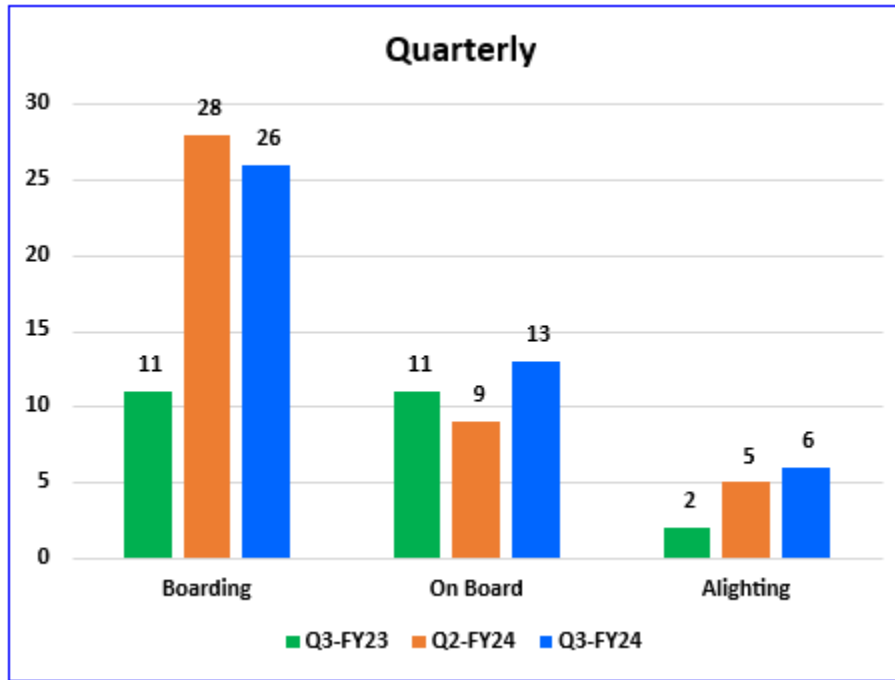
Risk Management & Safety KPI's

Traffic Accidents



- Total Traffic Accidents in Q3 FY24 increased by 12 (44%) when compared to both Q2 FY24 and Q3 FY23
- Collisions with Other Vehicles (between intersections) for Q3 FY24 stayed the same over Q2 FY24 and increased by 1 (14%) from a year ago, Q3 FY23
- Collisions with Other Vehicles (Intersections) for Q3 FY24 increased by 3 (300%) over Q2 FY24 and by 2 (100%) from a year ago, Q3 FY23
- Collisions with Other Vehicles (Rear End) for Q3 FY24 increased by 2 (200%) over Q2 FY24 and by 1 (50%) from a year ago, Q3 FY23
- Collisions Between (District Vehicles) for Q3 FY24 increased by 2 (100%) over Q2 FY24 and by 4 (400%) from a year ago, Q3 FY23
- Other Collisions for Q3 FY24 increased by 5 (33%) over Q2 FY24 and by 4 (25%) from a year ago, Q3 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)

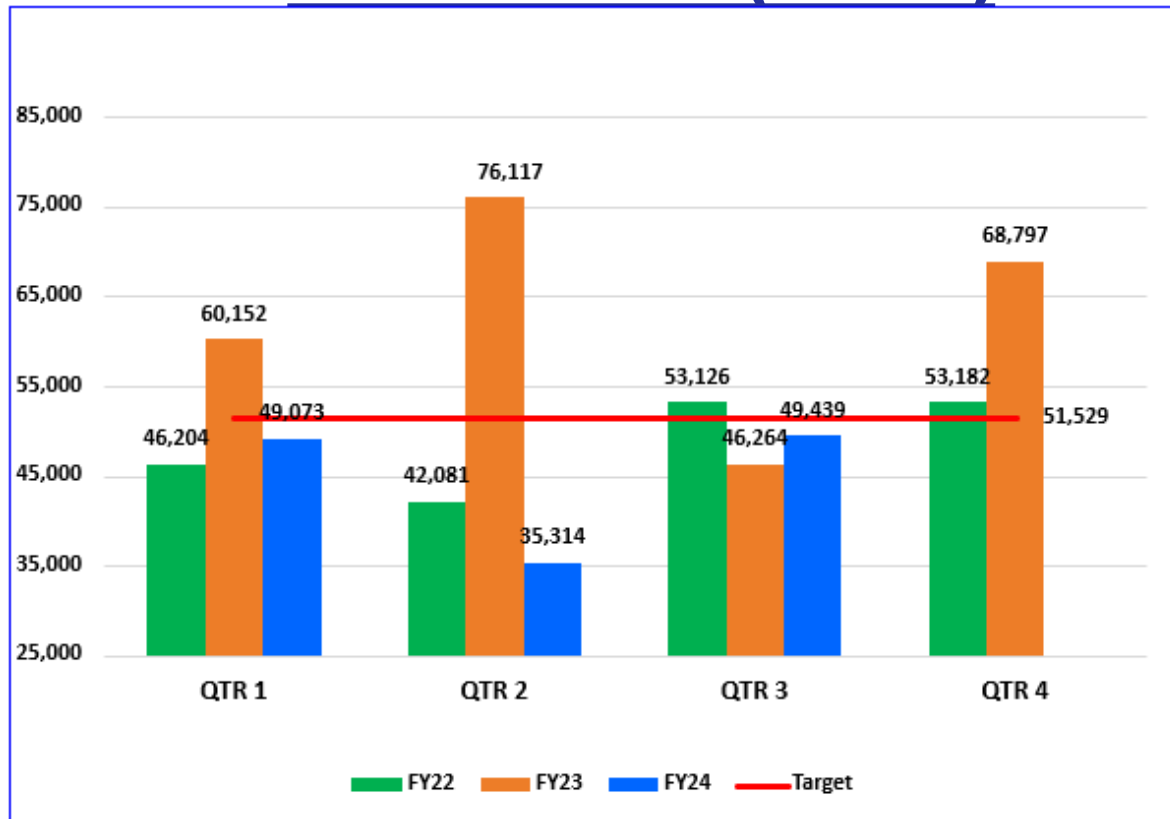
Passenger Incidents



- 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 1,943,086, 2,315,824, and 2,814,235 respectively for FY22, FY23, and FY24
- Metro Average of 128 is based on pre-pandemic 3-year average (FY19, FY22, FY23)

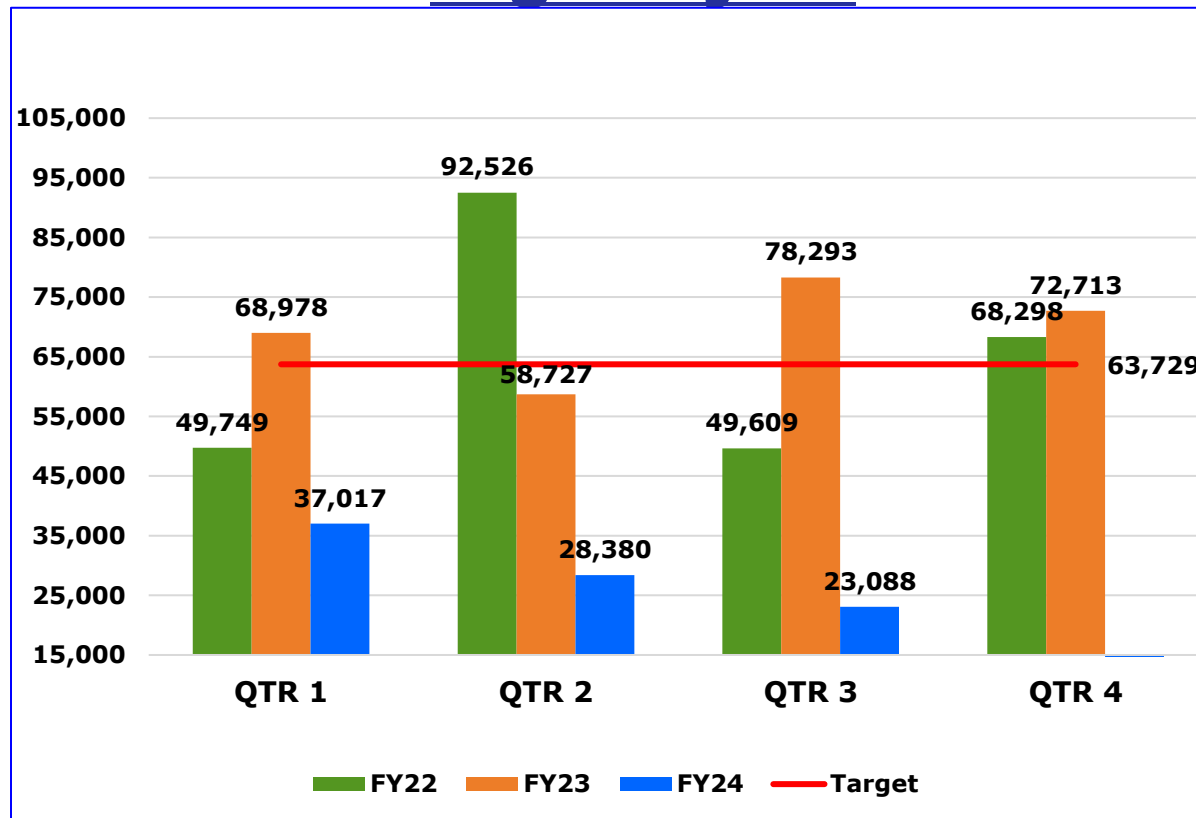
Reliability KPI's

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



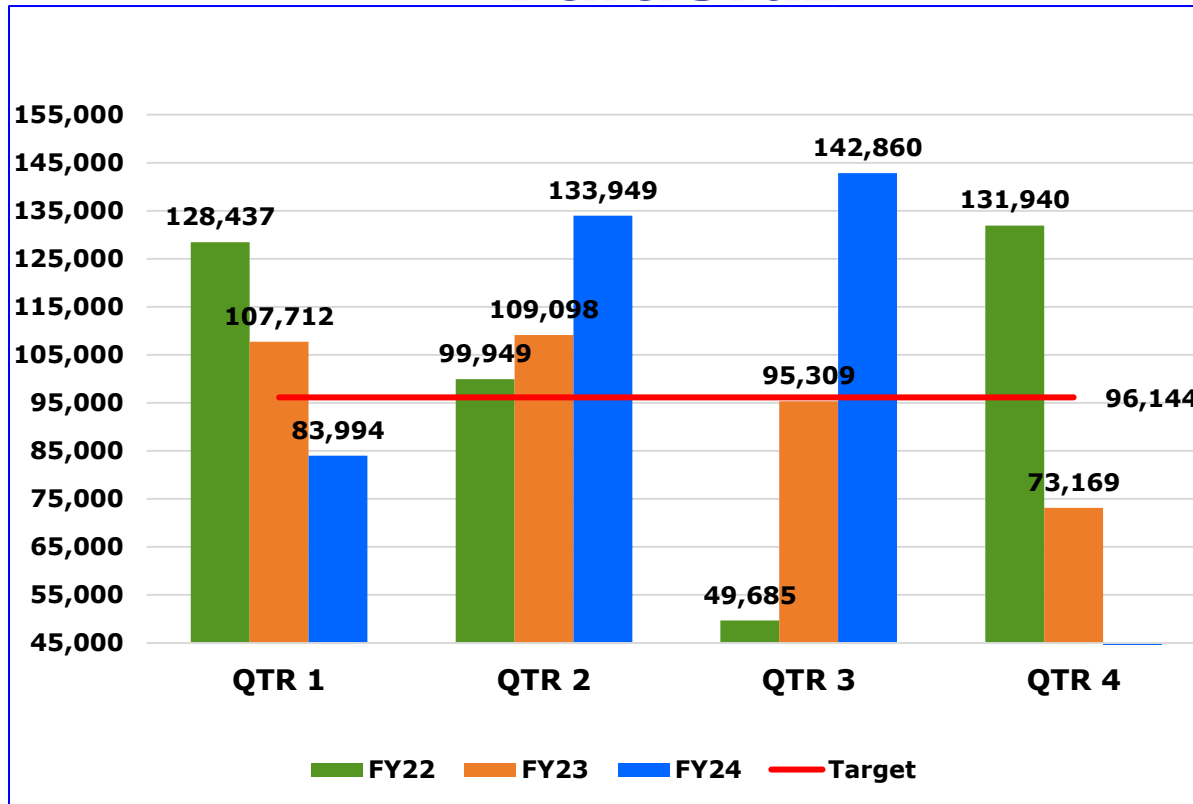
- Q3 FY24 mileage between calls increased by 3,175 and road calls decreased by 3 compared to the same time period in FY23
- Chargeable road calls in Q3 FY24 were 17 in January, 10 in February, and 14 in March
- The current target of 51,529 and is based off a 3-year monthly average from FY21-FY23, times three to get to a quarterly number.

Mean Miles Between Chargeable Road Calls – Highway 17



- Q3 FY24 mileage between calls decreased by 55,205 and road calls increased by 13 compared to the same time period in FY23
- Chargeable road calls in Q3 FY24 were 3 in January, 9 in February, and 6 in March
- 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.

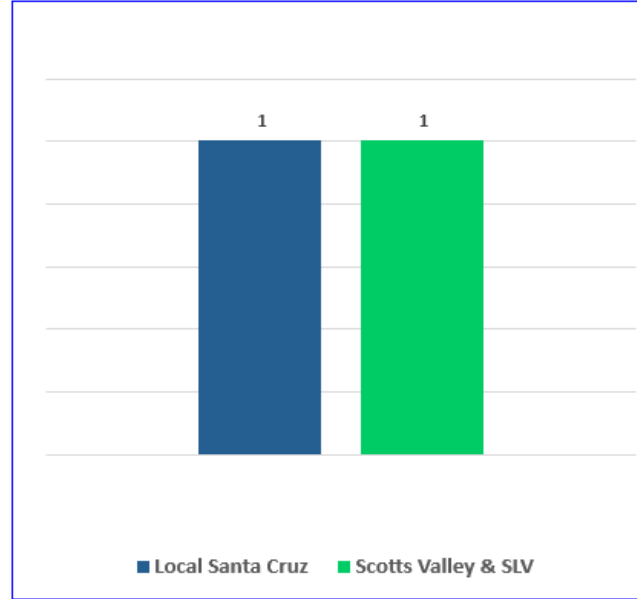
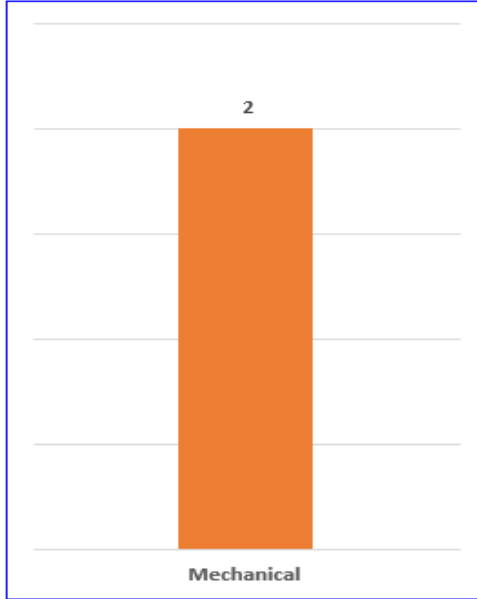
Mean Miles Between Chargeable Road Calls – ParaCruz



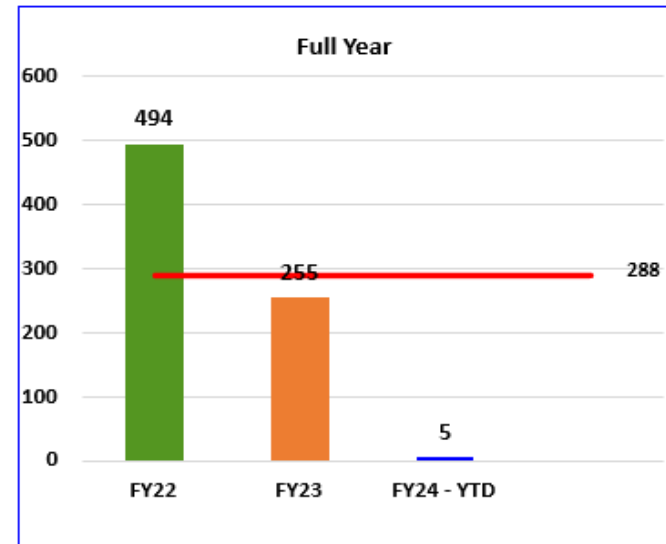
- Q3 FY24 mileage between calls increased by 47,551 and road calls decreased by 2 compared to the same time period in FY23, primarily due to the 7 new vans put into service last summer
- In Q3 FY24 chargeable road calls were zero in January, and 1 each in February and March
- The current target of 96,144 and is based off a 3-year monthly average from FY21-FY23, times three to get to a quarterly number.

Dependability KPI's

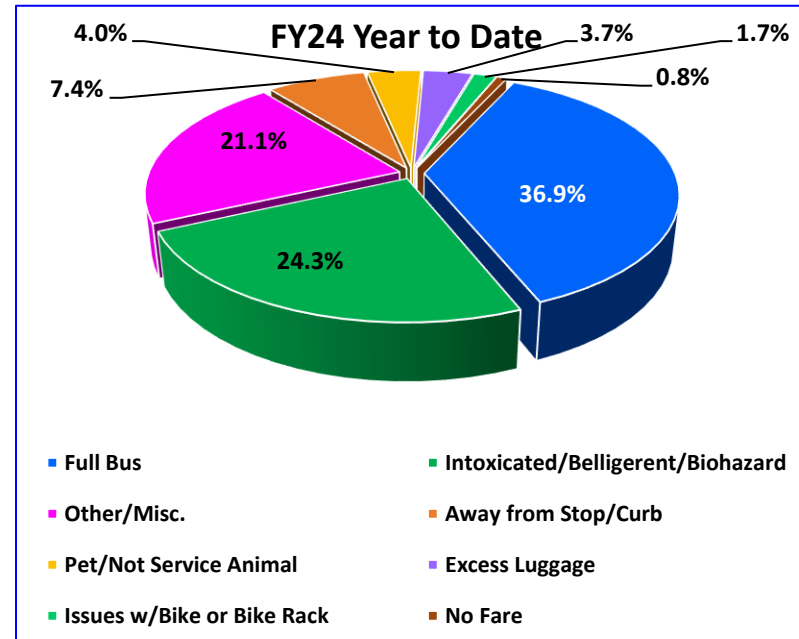
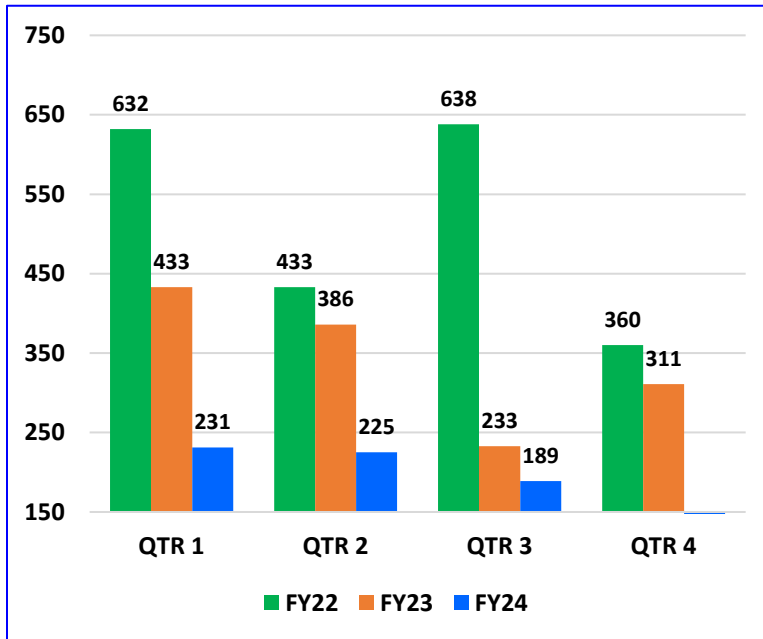
Cancelled Trips by Cause & Region



- There were 2 cancelled trips in Q3 FY24 both due to mechanical issues.
- Only two routes were impacted – Local Santa Cruz and Scotts Valley & SLV
- Full year average of 288 is based on pre-pandemic 3-year average (FY19, FY22, FY23)

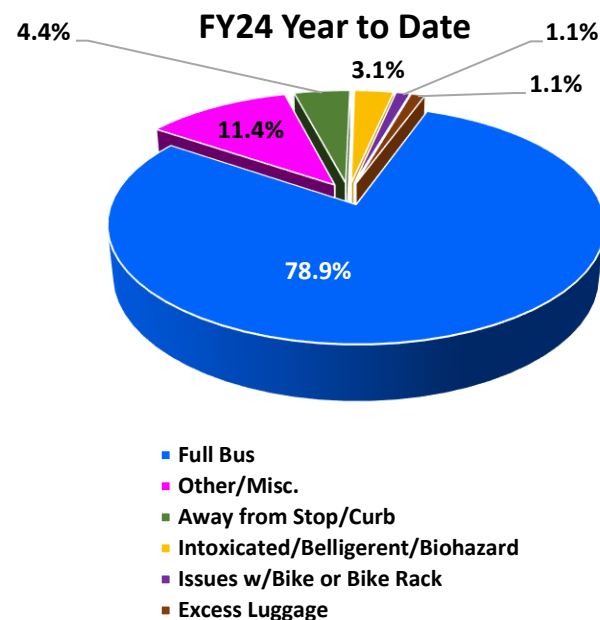
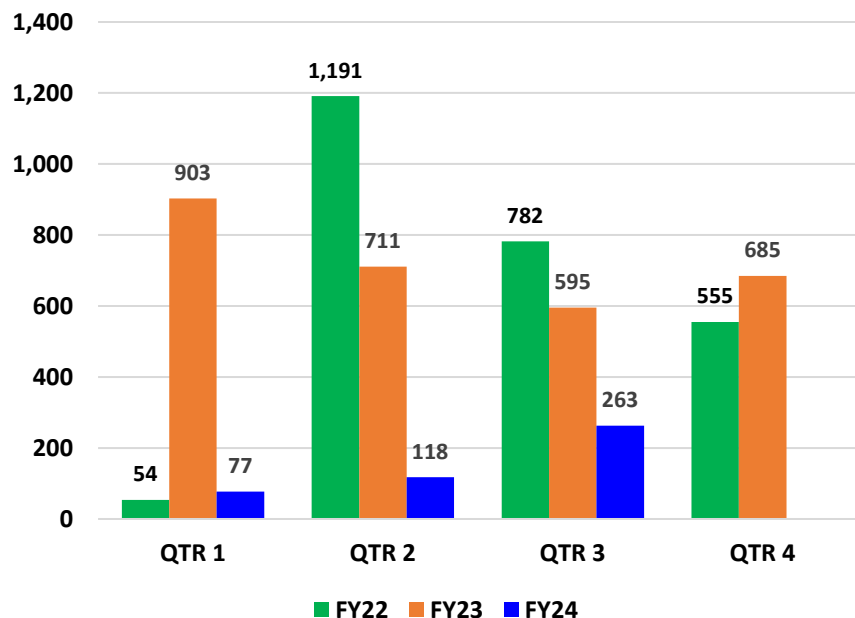


Pass-Ups by Quarter/Reason – Fixed Route



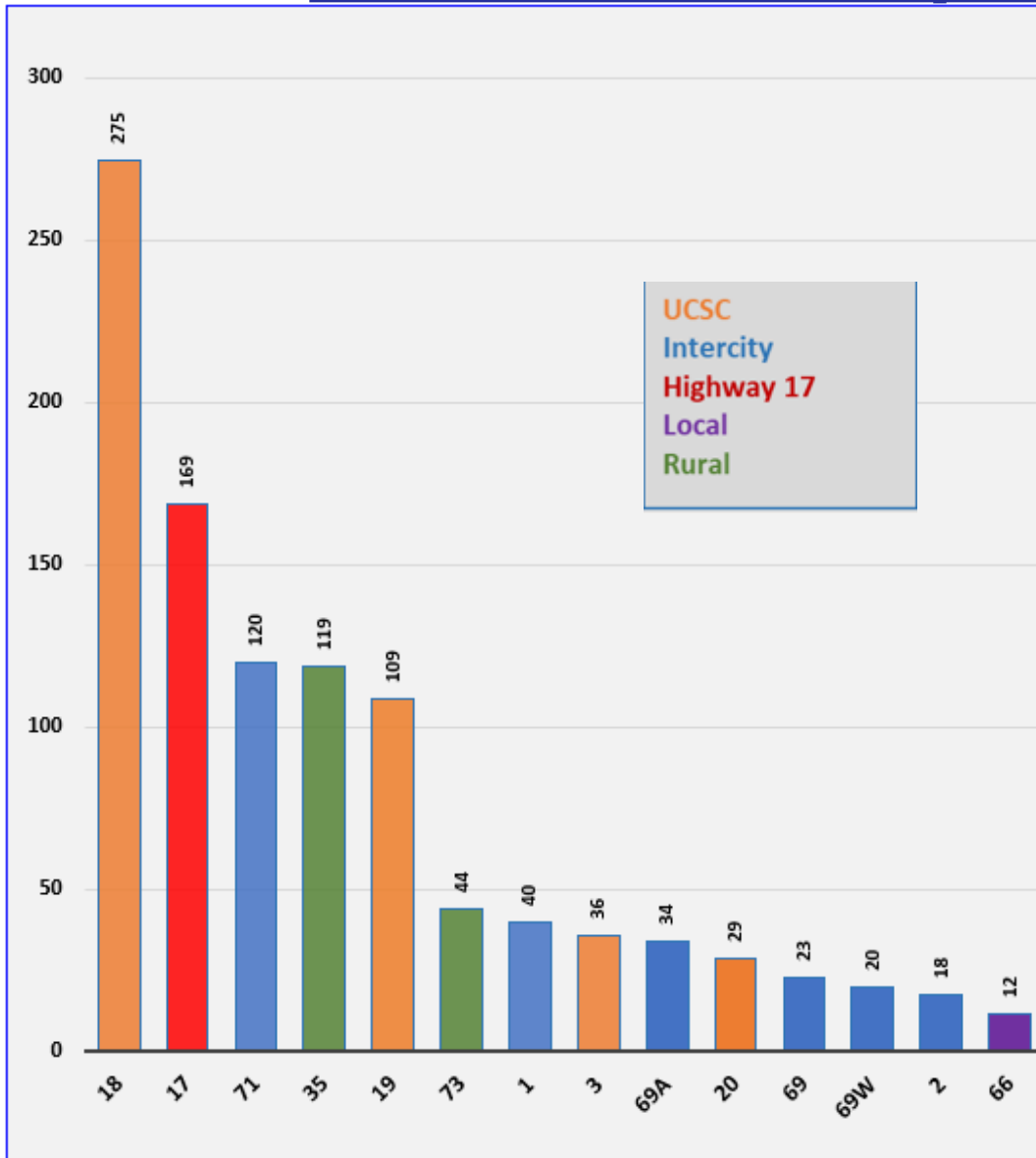
- In Q3 FY24, total pass-ups were 189, which is 44 (18.9%) lower when compared to Q3 FY23
- January had an increase of 12 pass-ups (25.0%), decreases in February of 15 (22.1%), and March of 41 (35.0%) when compared to the same time period as FY23
- 36.9% of Year-to-Date total pass-ups are caused by full bus capacity, followed by 24.3% due to Intoxicated/Belligerent/Biohazard, and 21.1% 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 10.0%

Pass-Ups by Quarter/Reason - UCSC



- In Q3 FY24, total pass-ups were 263, which is 332 (55.8%) lower when compared to Q3 FY23
- There were decreases across all months - January had 215 pass-ups (52.8%), February had 9 (13.8%), and March had 108 (87.8%) when compared to the same time period as FY23
- 78.9% of Year-to-Date total pass-ups are caused by full bus capacity, followed by 11.4% caused by other/Misc., all other categories are less than 5.0%

YTD FY24 Pass-Ups by Route*



- YTD Pass-ups total 1103
- UCSC Routes comprised 458 (41.5%), of which 78.6% were due to full bus capacity
- Intercity Routes comprised 264 (23.9%), of which 33.0% were due to Intoxicated/Biohazard
- Highway 17 Routes comprised 169 (15.3%), of which 68.0% were due to full bus capacity
- Rural Routes comprised 164 (14.9%), of which 59.1% were due to full bus capacity
- Local Routes comprised 48 (4.4%), 41.7% 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	<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	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	14,870
Monthly Mean Miles Between Chargeable Road Calls - Highway 17	23,043	24,126	18,821	21,682	23,226	9,832
Monthly Mean Miles Between Chargeable Road Calls - ParaCruz	44,221	44,329	29,869	34,168	32,107	40,089
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	1,825,006
Annual Road Miles - Highway 17	627,207	540,859	324,281	373,984	403,492	337,446
Annual Road Miles - ParaCruz	601,229	531,951	373,748	503,650	505,399	384,050