



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

**FOR 4th Quarter through June 30, 2024**

Finance, Budget & Audit Standing Committee

*September 13, 2024*

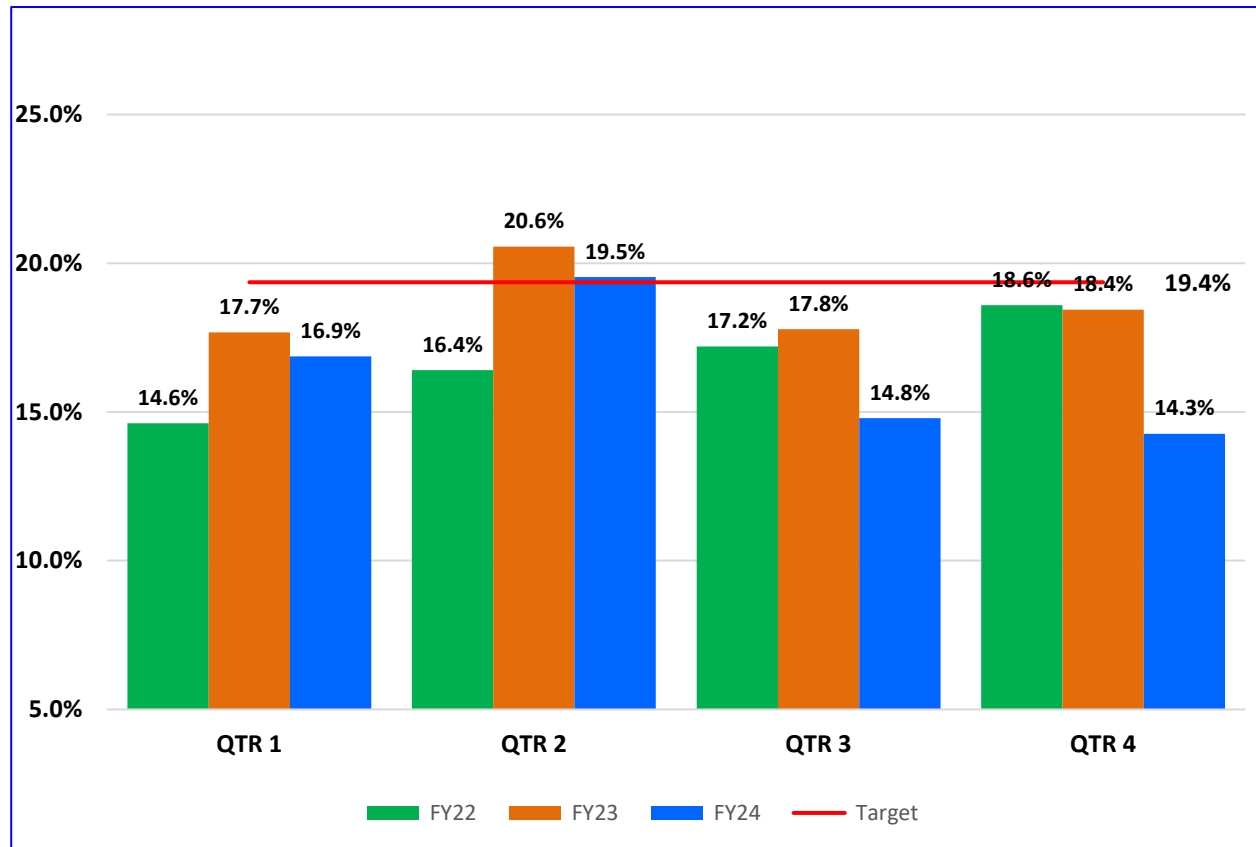
Chuck Farmer, Chief Financial Officer

# 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>

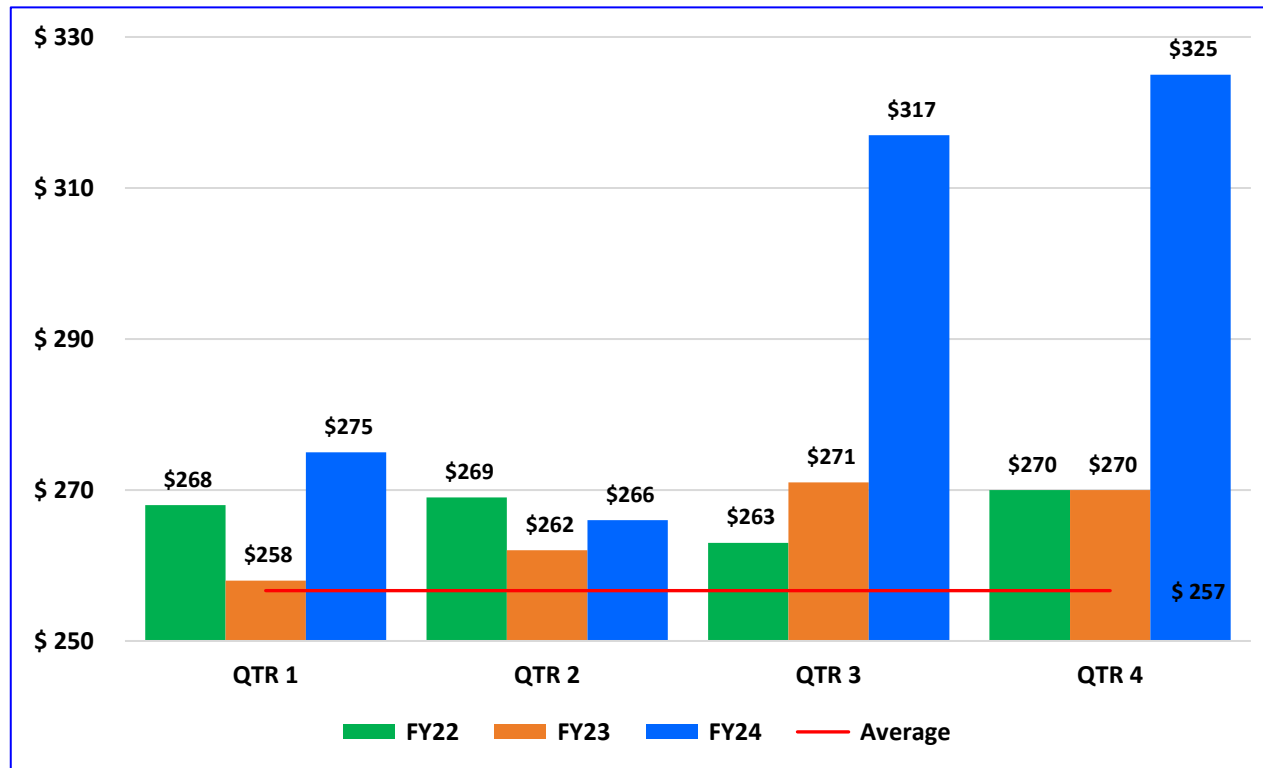
# **Financial Performance KPI's**

# System Farebox Recovery:



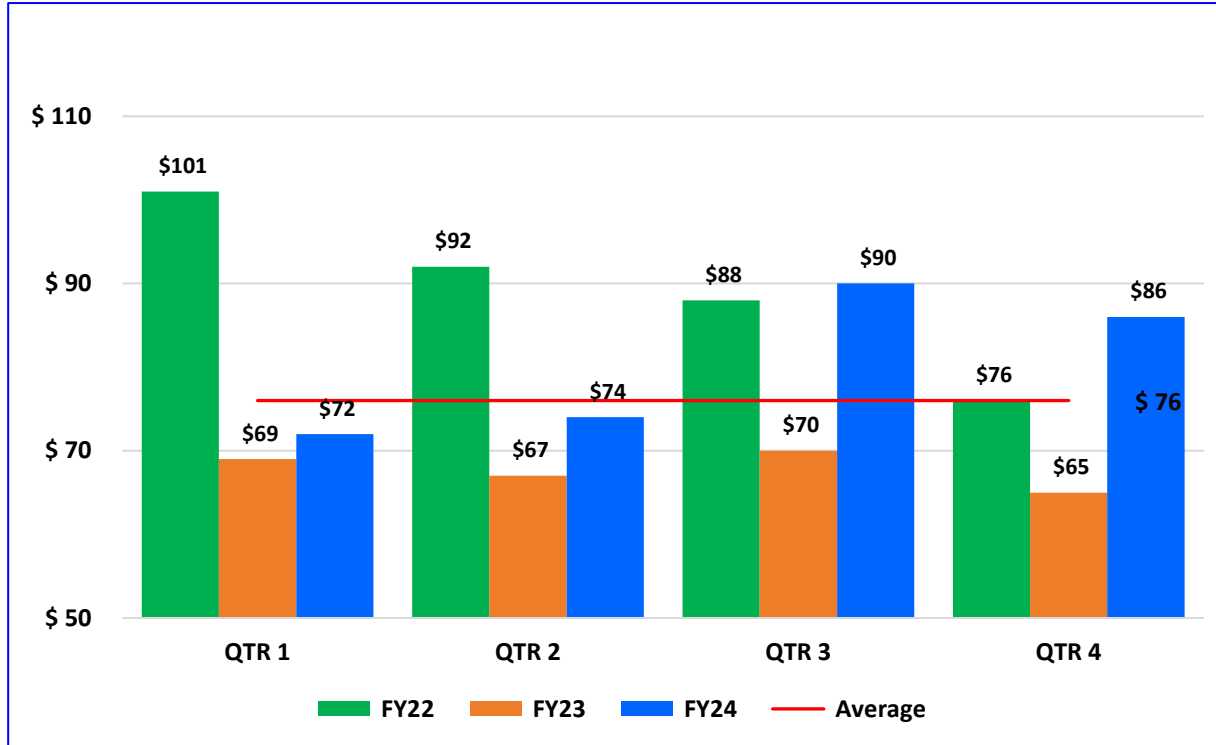
- Q4 FY24 Farebox Recovery is 14.3%, a year-over-year decline of 4.1% primarily due to Youth Free Fares; 5.1% lower than target and 0.5% lower than Q3 FY24.
- The Farebox Recovery Target of 19.4% is based on the average actuals from FY19, FY22, FY23 (excludes FY20/FY21 due to COVID impact)

## Fixed Route/Commuter Cost per RSH



- Q4 FY24 Cost per RSH is \$325, an increase of \$55 over last year's Q4 costs, and \$68 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 10.5% along with Fixed Route costs that increased by 32.9% when compared to the same time period FY23
- The Fixed Route/Commuter cost per RSH average of \$257 is based on the average actuals from FY19, FY22, and FY23 (excludes FY20/FY21 due to COVID impact)

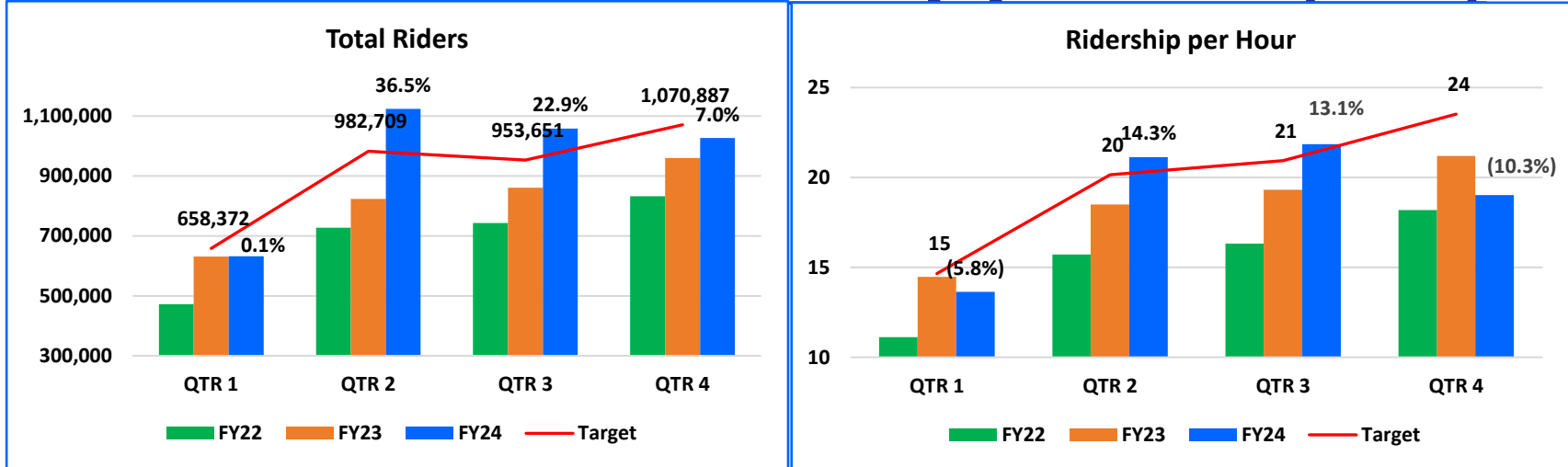
## ParaCruz Cost per Trip



- Q4 FY24 Cost per Trip is \$86, a year-over-year deteriorate of \$21, and \$10 higher than average.
- Trips delivered decreased 15.5% and costs increased 12.6% when compared to the same time period FY23
- The ParaCruz Cost per Trip average of \$76 is based on the average actuals from FY19, FY22, and FY23 (excludes FY20/FY21 due to COVID impact)

# **Productivity KPI's**

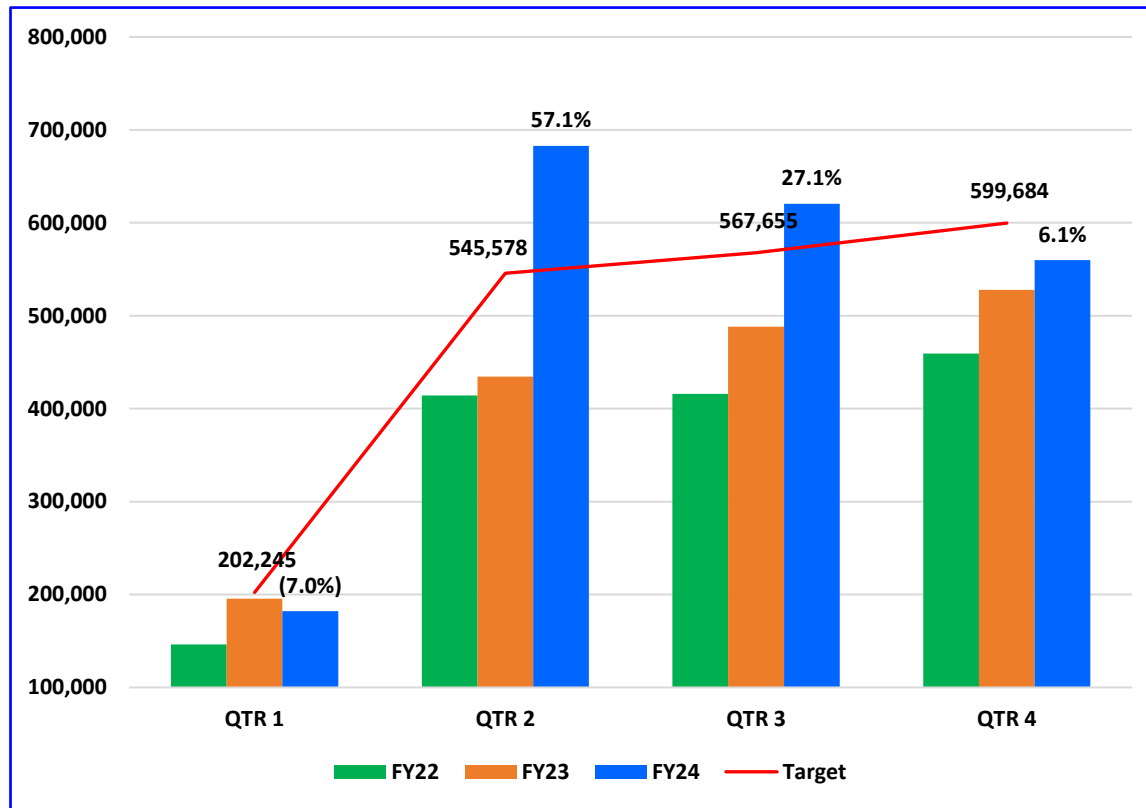
# Total Ridership / Ridership per Hour (RPH)



- A 0.2% decrease in ridership in local, non-student ridership service over Q4 of FY23
- A 11.7% increase in Student ridership, includes UCSC, Cabrillo and K-12 ridership over Q4 of FY23
- A 10.0% decrease in Highway 17 ridership over Q4 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 6.1% over Q4 of FY23
- Cabrillo ridership increased 41.1% over Q4 of FY23
- Youth ridership increased 47.4% over Q4 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)

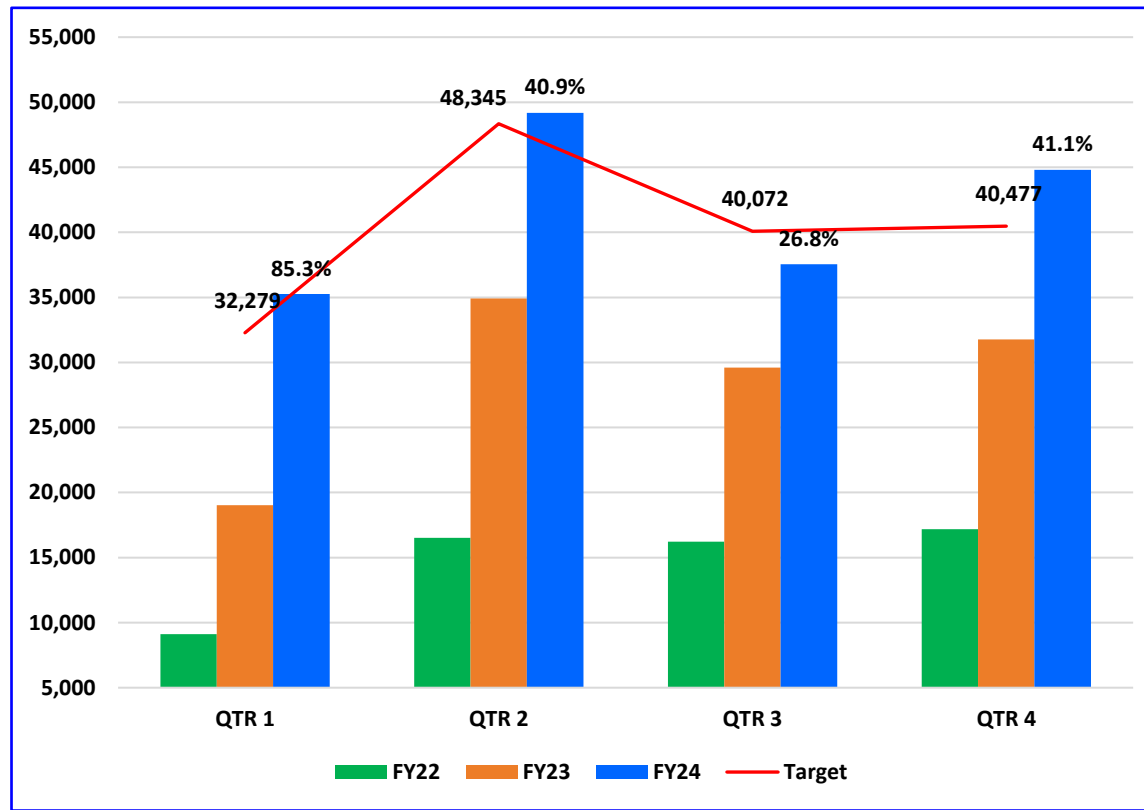


# UCSC Ridership



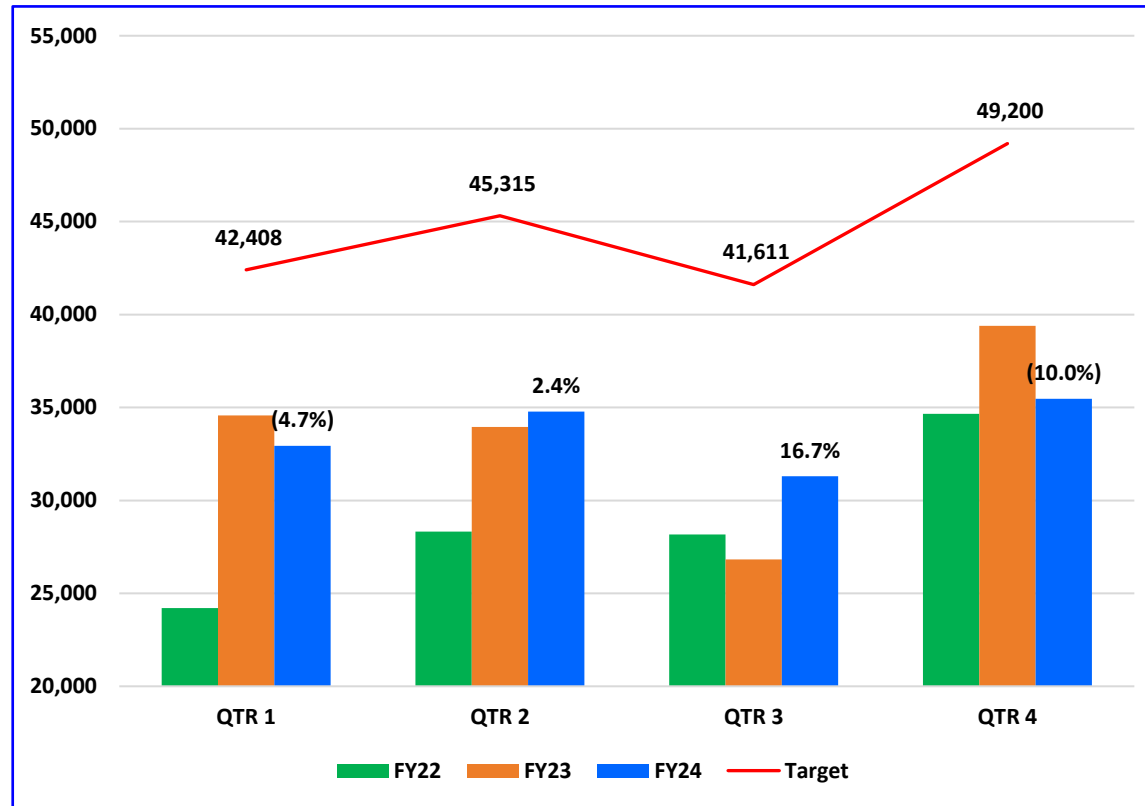
- Q4 Ridership increased 6.1%, a year-over-year due to a few factors. Additional service was operated on the routes 18 and 19. METRO increased the number of trips that were operated with articulated buses (60' buses), which increased carrying capacity. Enrollment and on-campus residency increased 1.5% 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



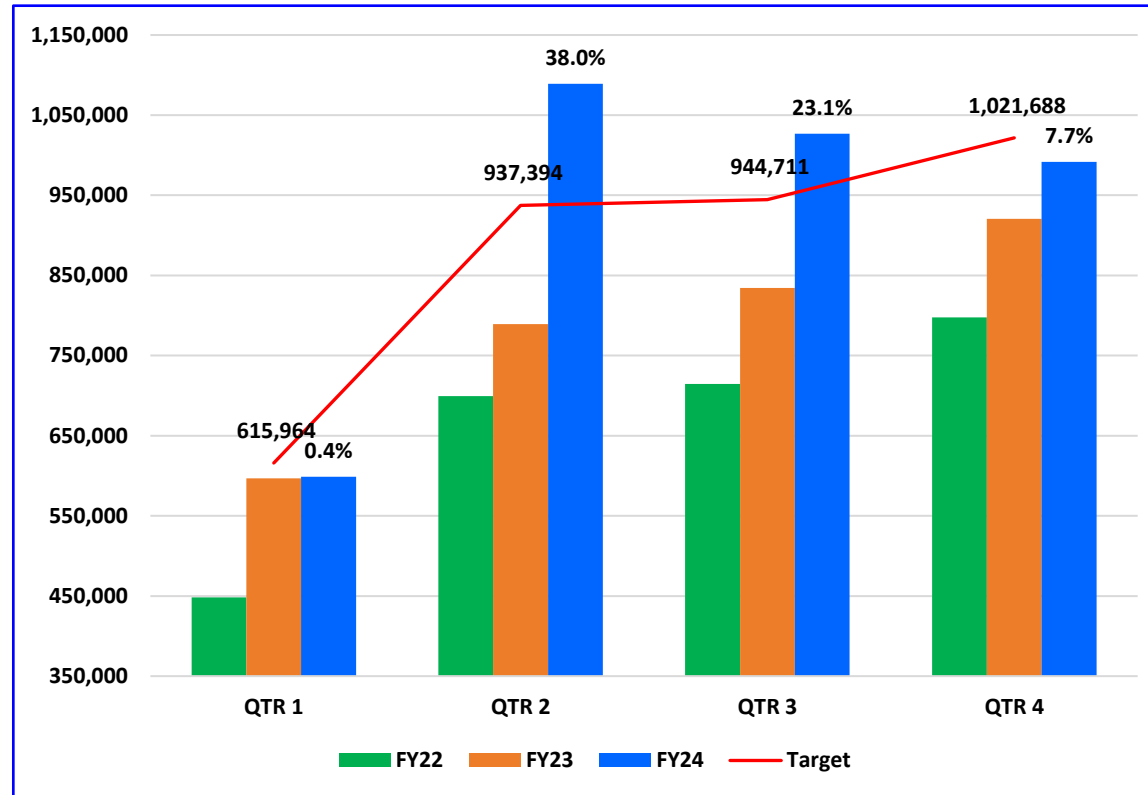
- Q4 Ridership increased 41.1% as student enrollment increased by 0.8%. More students also returned to in-person sessions. Though, over half of students were still taking online classes, at least part-time.
- The Quarterly Ridership Target is based on the average quarterly actuals from FY18, FY19, FY22 (excludes FY20/FY21 due to COVID impact)

# Highway 17 Ridership



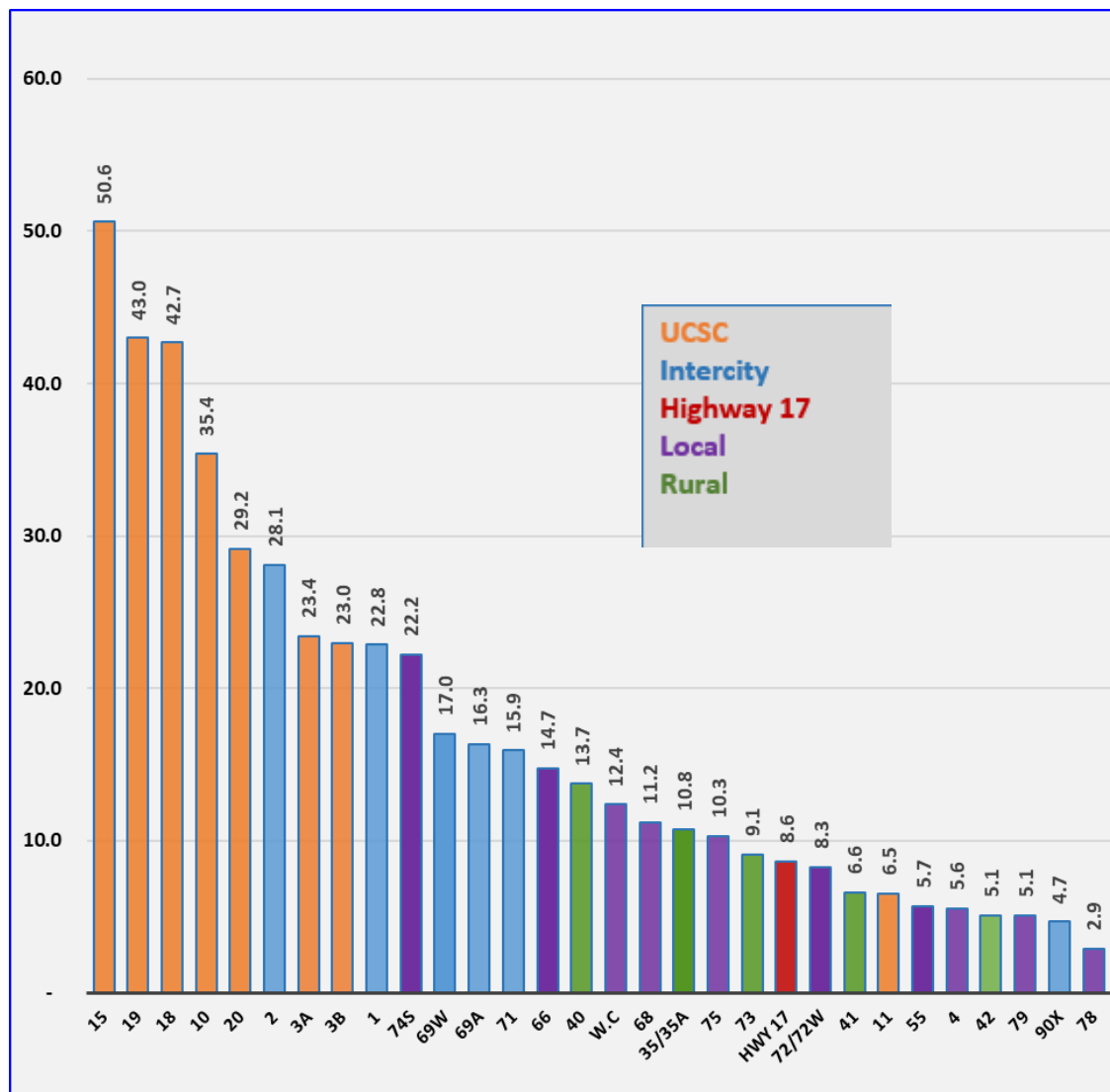
- Q4 Ridership decreased 10.0% compared to Q4 FY23 due to the availability of remote work and flexible commute hours. Additionally, METRO only operated three northbound and three southbound trips to San Jose State University (SJSU). It is possible that SJSU students would increase their usage of the service if more frequent service to SJSU was operated.
- 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



- Q4 Ridership increased 7.7%, which is a direct result of a student ridership increase of 11.7%. Student ridership is comprised of UCSC, Cabrillo and K-12, which increased 6.1%, 41.1%, and 47.4% 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 37.1

Combined Intercity Passengers/Service Hours were 19.0

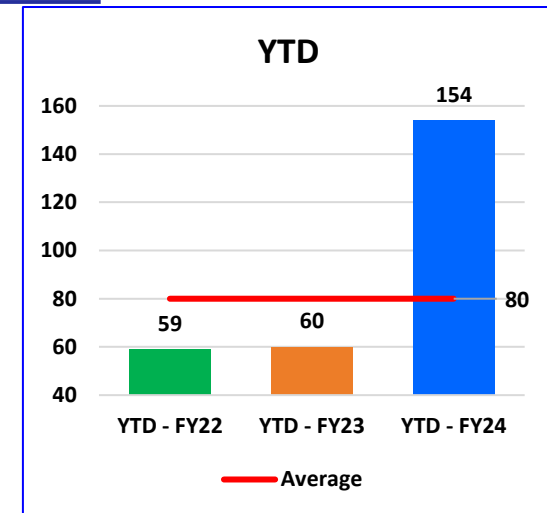
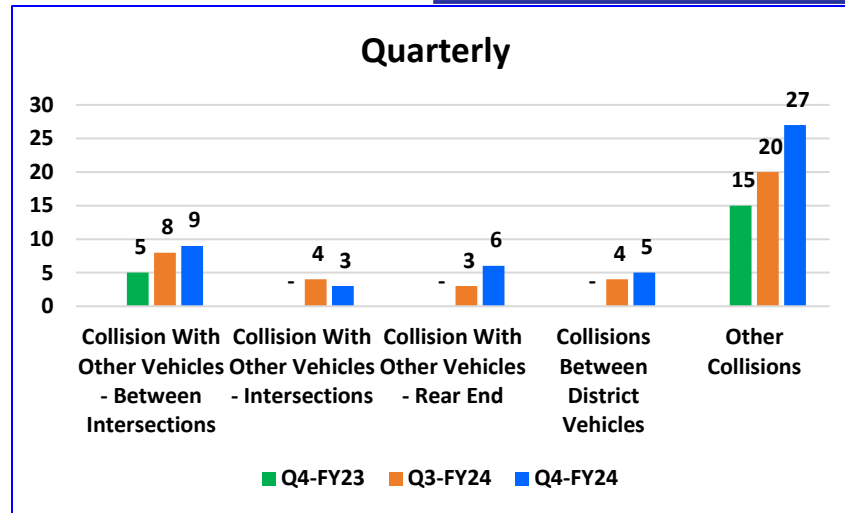
Combined Rural Passengers/Service Hours were 10.1

Combined Local Passengers/Service Hours were 9.0

Combined Highway 17 Passengers/Service Hours were 8.6

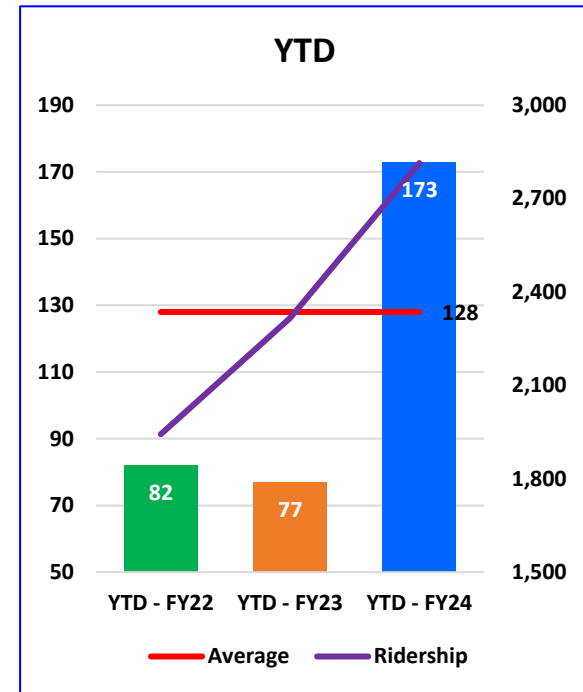
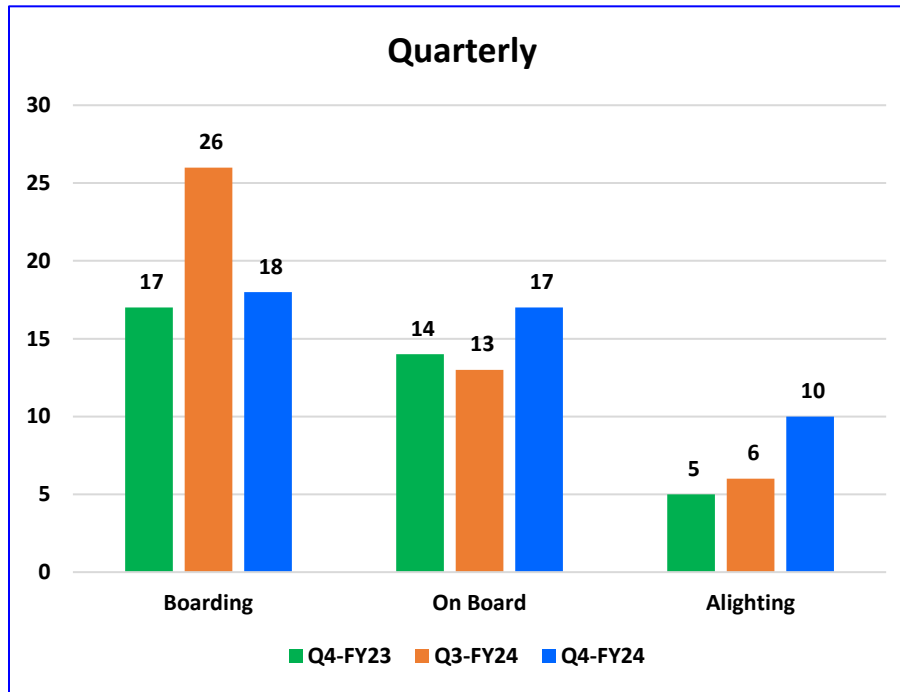
# **Risk Management & Safety KPI's**

# Traffic Accidents



- Total Traffic Accidents in Q4 FY24 increased by 11 (28.2%) over Q3 FY24 and increased by 30 (150%) from a year ago, Q4 FY23
- Collisions with Other Vehicles (between intersections) for Q4 FY24 increased by 1 (12.5%) over Q3 FY24 and increased by 4 (80%) from a year ago, Q4 FY23
- Collisions with Other Vehicles (Intersections) for Q4 FY24 decreased by 1 (25%) over Q3 FY24 and by 3 (300%) from a year ago, Q4 FY23
- Collisions with Other Vehicles (Rear End) for Q4 FY24 increased by 3 (100%) over Q3 FY24 and by 6 (600%) from a year ago, Q4 FY23
- Collisions Between (District Vehicles) for Q4 FY24 increased by 1 (25%) over Q3 FY24 and by 5 (500%) from a year ago, Q4 FY23
- Other Collisions for Q4 FY24 increased by 7 (35%) over Q3 FY24 and by 12 (80%) from a year ago, Q4 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

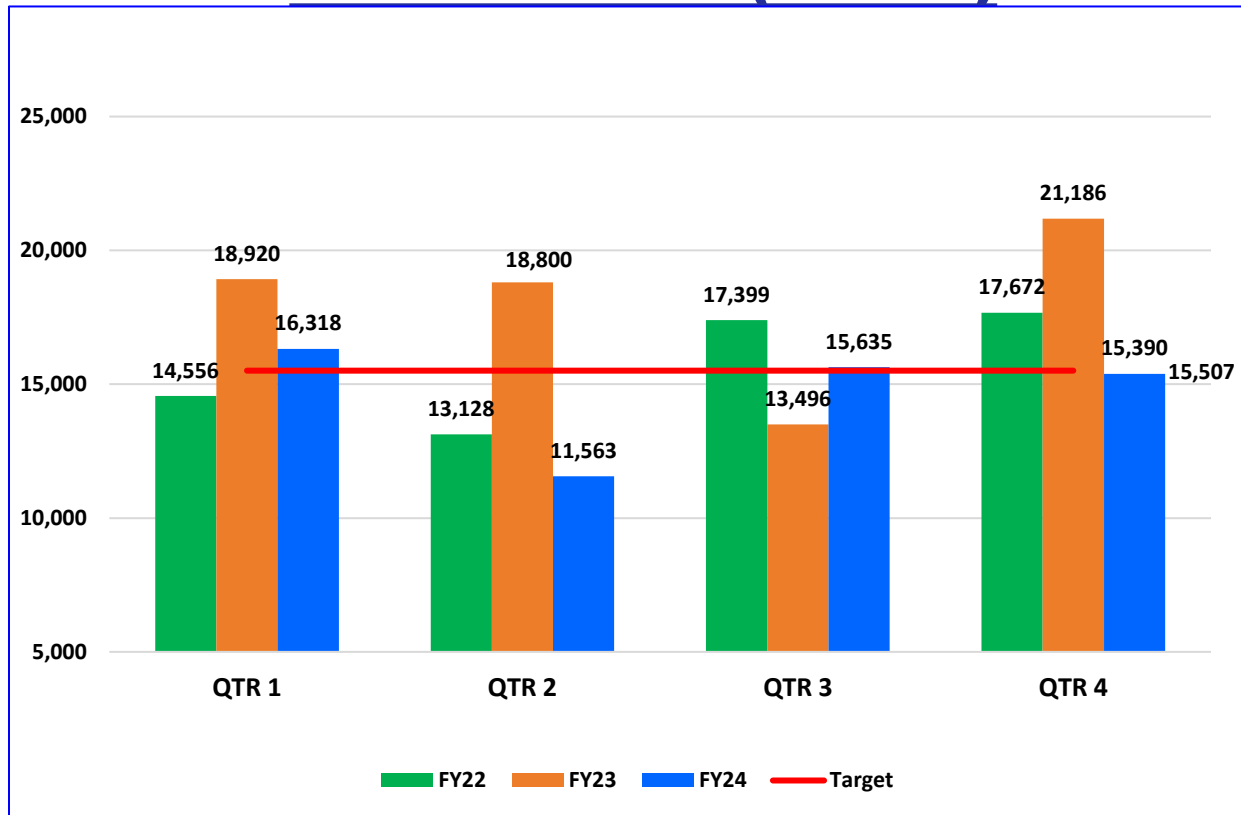


- Safety, Fleet Maintenance, and Information Technology departments are collaborating to identify further methods to reduce the number of incidents.
- Most boarding incidents occur when the passengers are using cell phones, not paying attention, or sleeping.
- YTD Ridership numbers are 2,775,283, 3,275,802, and 3,841,433 respectively for FY22, FY23, and FY24
- Metro Average of 128 is based on pre-pandemic 3-year average (FY19, FY22, FY23)



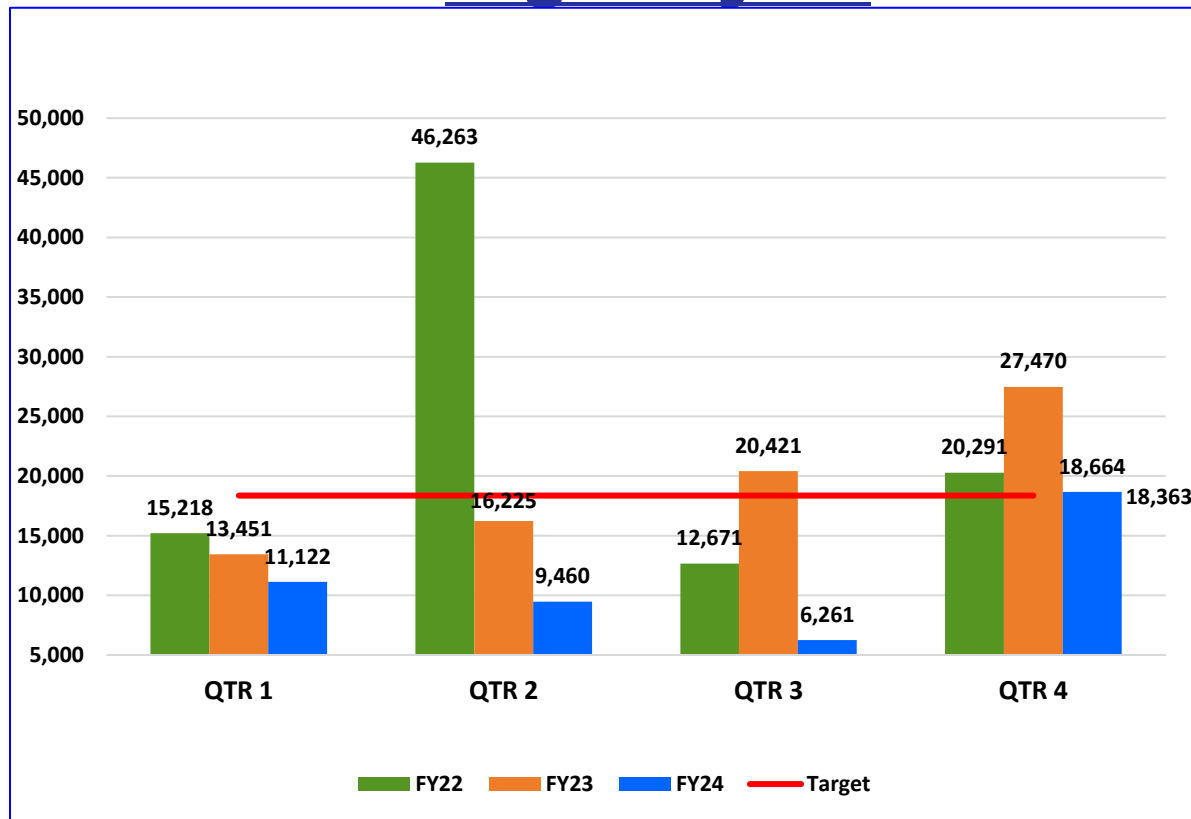
# **Reliability KPI's**

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



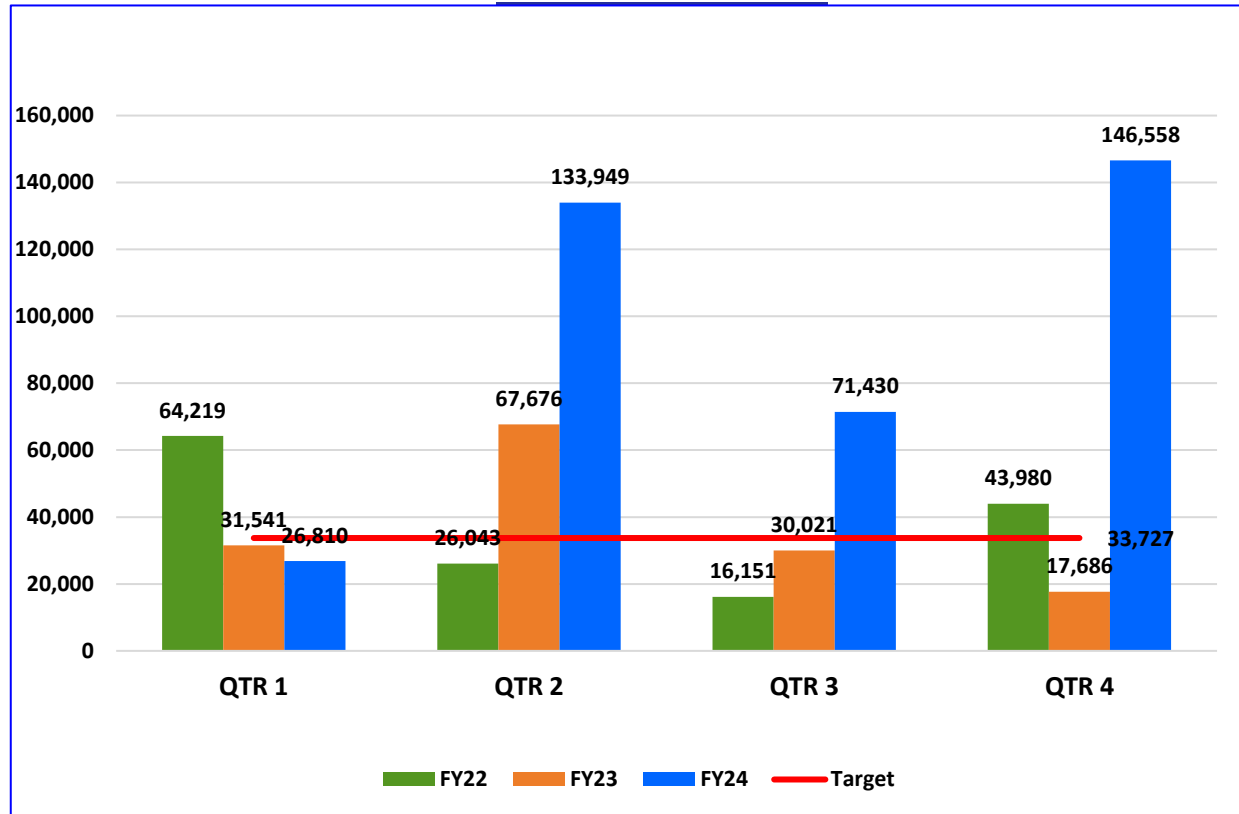
- Q4 FY24 mileage between calls decreased by 5,796 and road calls increased by 21 compared to the same time period in FY23
- Chargeable road calls in Q4 FY24 were 13 in April, 16 in May, and 21 in June
- The current target of 15,507 and is based off a 3-year monthly average from FY21-FY23, times three to get to a quarterly number.

# Mean Miles Between Chargeable Road Calls – Highway 17



- Q4 FY24 mileage between calls decreased by 8,806 and road calls increased by 3 compared to the same time period in FY23
- Chargeable road calls in Q4 FY24 were 2 in April, 3 in May, and 2 in June
- The current target of 18,363 and is based off a 3-year monthly average from FY21-FY23, times three to get to a quarterly number.

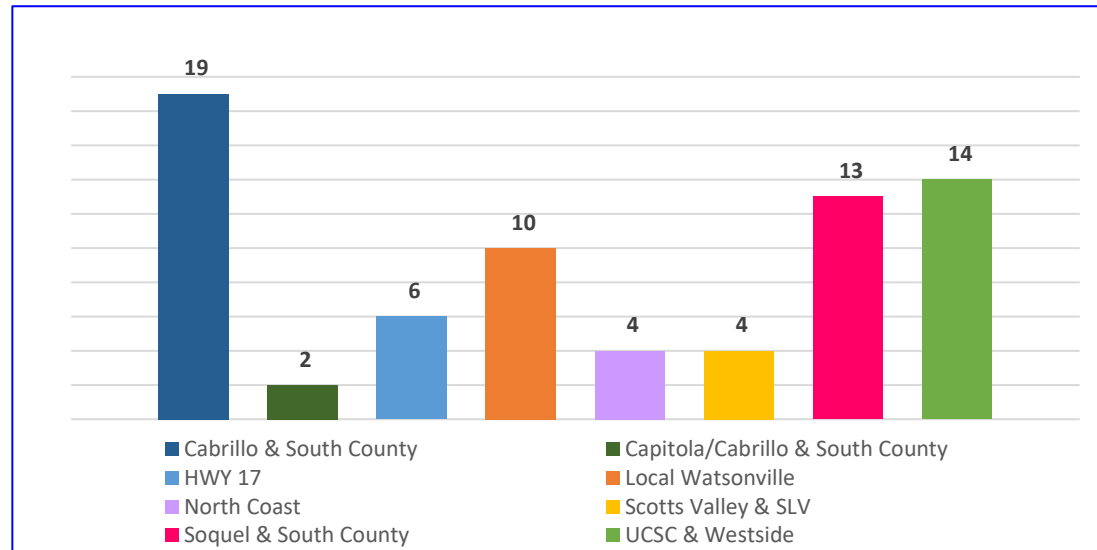
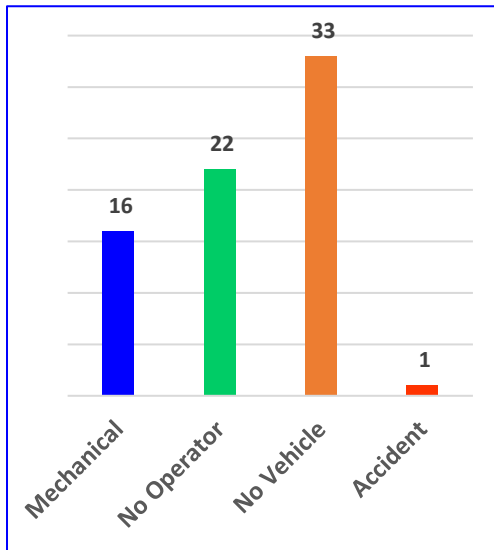
# Mean Miles Between Chargeable Road Calls – ParaCruz



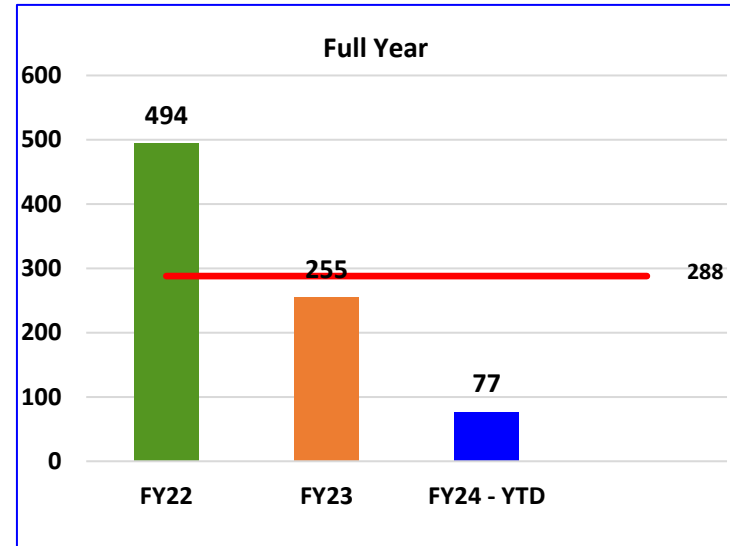
- Q4 FY24 mileage between calls increased by 128,872 and road calls decreased by 6 compared to the same time period in FY23, primarily due to the 7 new vans put into service last summer
- In Q4 FY24 chargeable road calls were 0 in April, 1 in May and 0 in June
- The current target of 33,727 and is based off a 3-year monthly average from FY21-FY23, times three to get to a quarterly number.

# **Dependability KPI's**

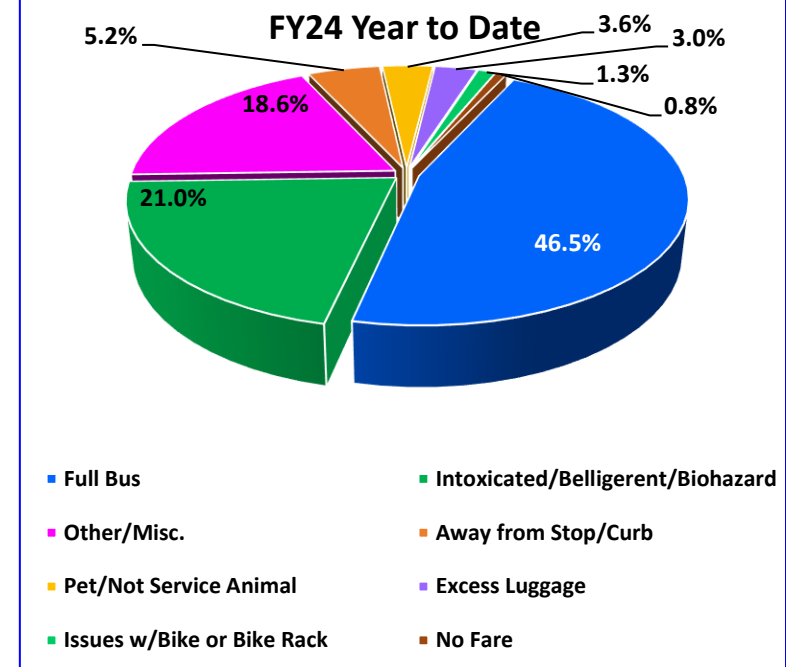
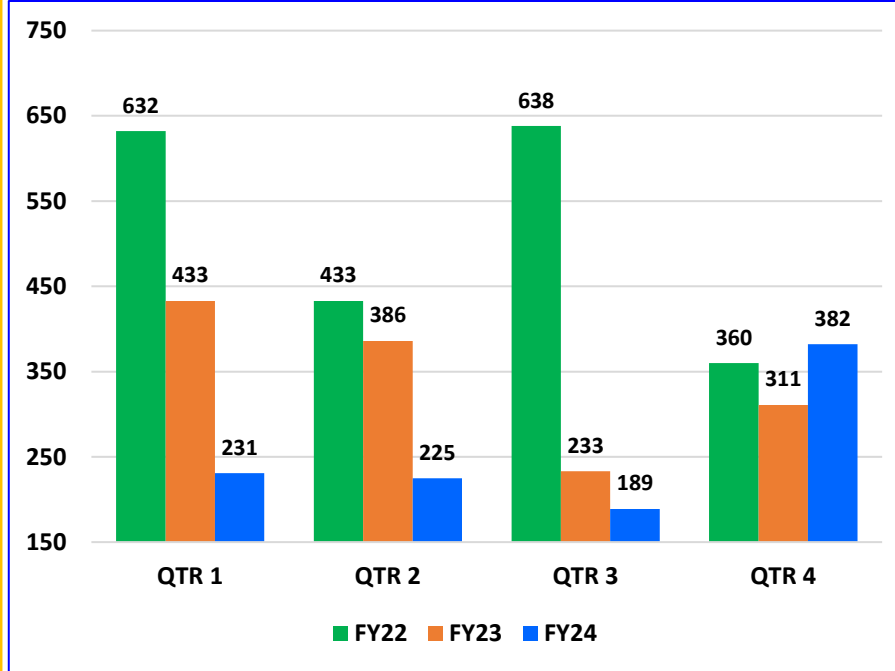
# Cancelled Trips by Cause & Region



- There were 72 cancelled trips in Q4 FY24 – 10 in May and 62 in June primarily due to no vehicle
- Eight regions were impacted
- Full year average of 288 is based on pre-pandemic 3-year average (FY19, FY22, FY23)

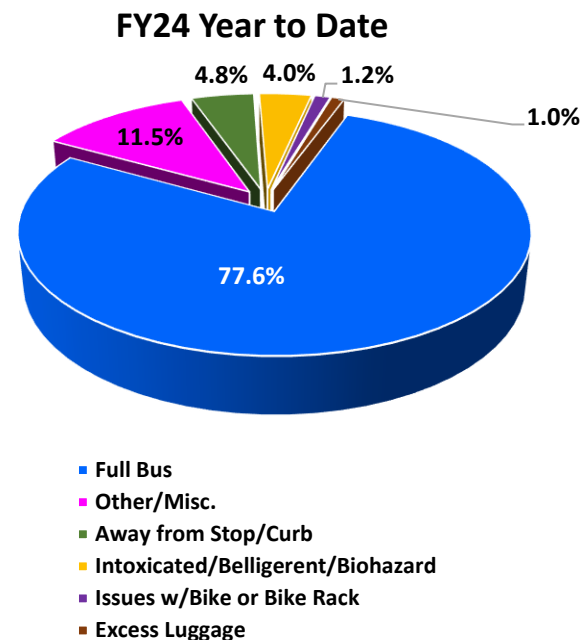
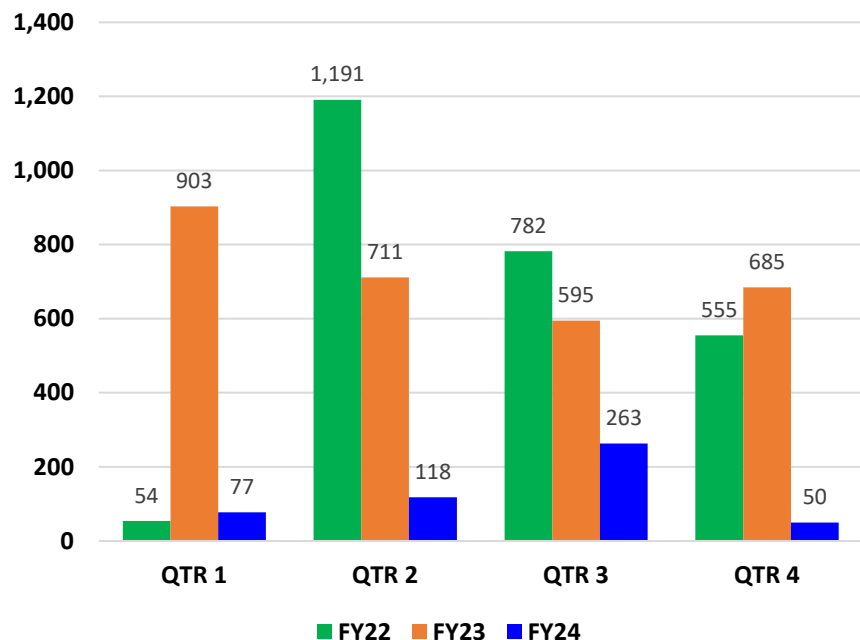


# Pass-Ups by Quarter/Reason – Fixed Route



- In Q4 FY24, total pass-ups were 382, which is 71 (22.8%) higher when compared to Q4 FY23
- April had an increase of 58 pass-ups (82.9%), May had an increase of 29 (17.9%), and June had a decrease of 16 (20.3%) when compared to the same time period as FY23
- 46.5% of Year-to-Date total pass-ups are caused by full bus capacity, followed by 21.0% due to Intoxicated/Belligerent/Biohazard, and 18.6% 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 15.0%

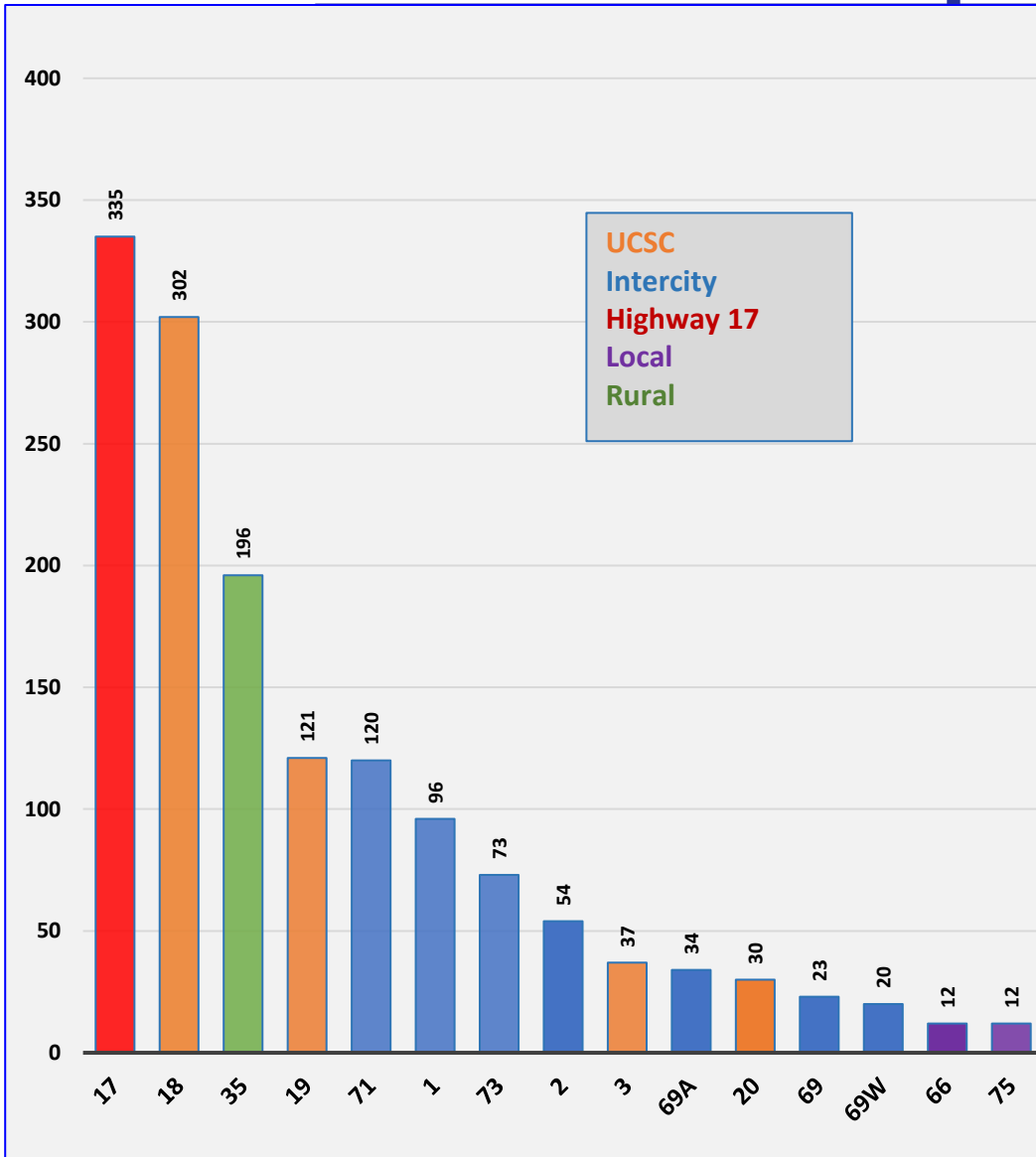
## Pass-Ups by Quarter/Reason - UCSC



- In Q4 FY24, total pass-ups were 50, which is 635 (92.7%) lower when compared to Q4 FY23
- There were decreases across all months - April had 37 pass-ups (92.4%), May had 6 (94.7%), and June had 7 (92.0%) when compared to the same time period as FY23
- 77.6% of Year-to-Date total pass-ups are caused by full bus capacity, followed by 11.5% caused by other/Misc., all other categories are less than 11.0%



## YTD FY24 Pass-Ups by Route\*



- YTD Pass-ups total 1535
- UCSC Routes comprised 508 (33.1%), of which 77.0% were due to full bus capacity
- Intercity Routes comprised 359 (23.9%), of which 34.8% were due to Intoxicated/Biohazard
- Highway 17 Routes comprised 335 (21.8%), of which 80.3% were due to full bus capacity
- Rural Routes comprised 270 (17.6%), of which 67.4% were due to full bus capacity
- Local Routes comprised 63 (4.1%), 44.4% 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 <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%	16.2%
Fixed Route/Commuter Cost/RSH	211	270	298	271	247	296
ParaCruz Cost/Trip	72	129	181	91	69	80
Monthly Mean Miles Between Chargeable Road Calls - Fixed Route	2,443,157	2,139,917	1,999,474	2,325,531	2,358,618	2,594,510
Monthly Mean Miles Between Chargeable Road Calls - Highway 17	562,616	561,978	451,893	582,237	567,603	468,091
Monthly Mean Miles Between Chargeable Road Calls - ParaCruz	623,119	625,757	513,806	603,904	582,806	530,608
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	-	-	-	-	-	-
Annual Road Miles - Highway 17	-	-	-	-	-	-
Annual Road Miles - ParaCruz	-	-	-	-	-	-