



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

**FOR 3rd Quarter through March 31, 2025**

Board of Directors

*May 16, 2025*

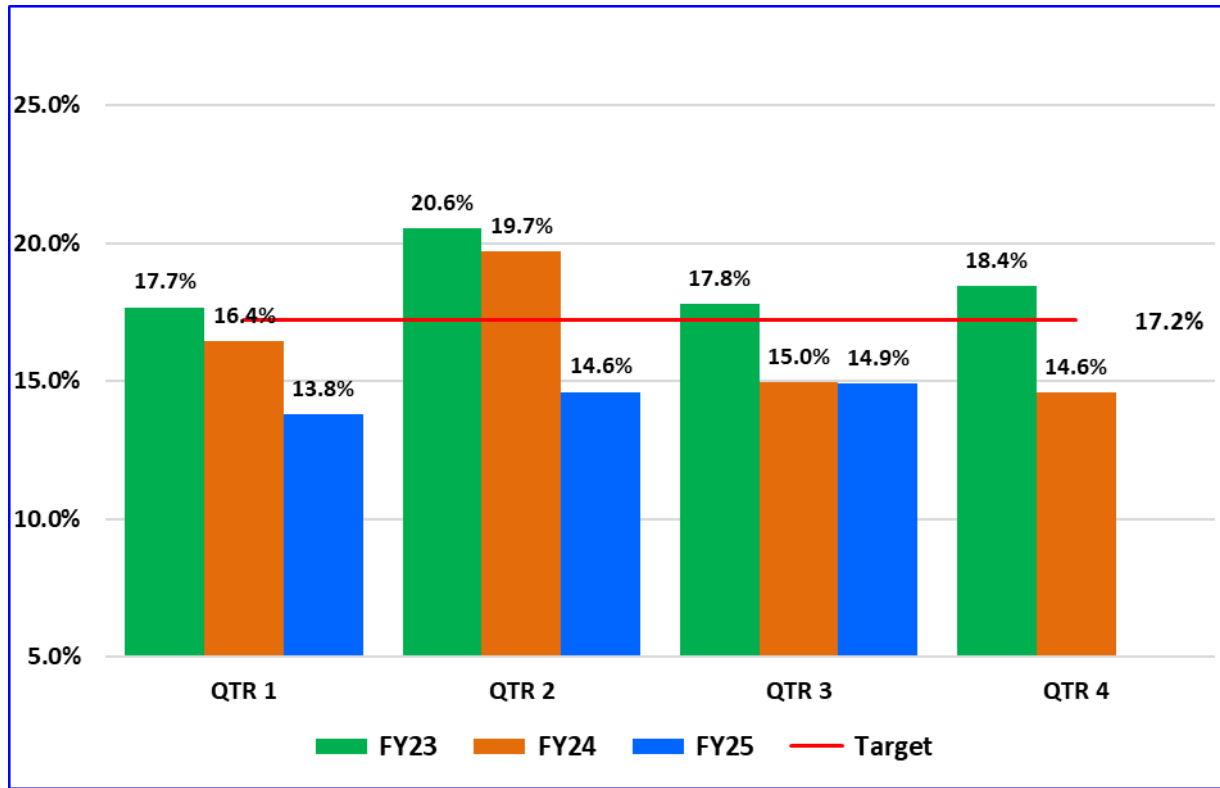
Chuck Farmer, Chief Financial Officer

# Overview of Today's Presentation:

<b>KPI Category</b>	<b>Criteria / Metric</b>
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**

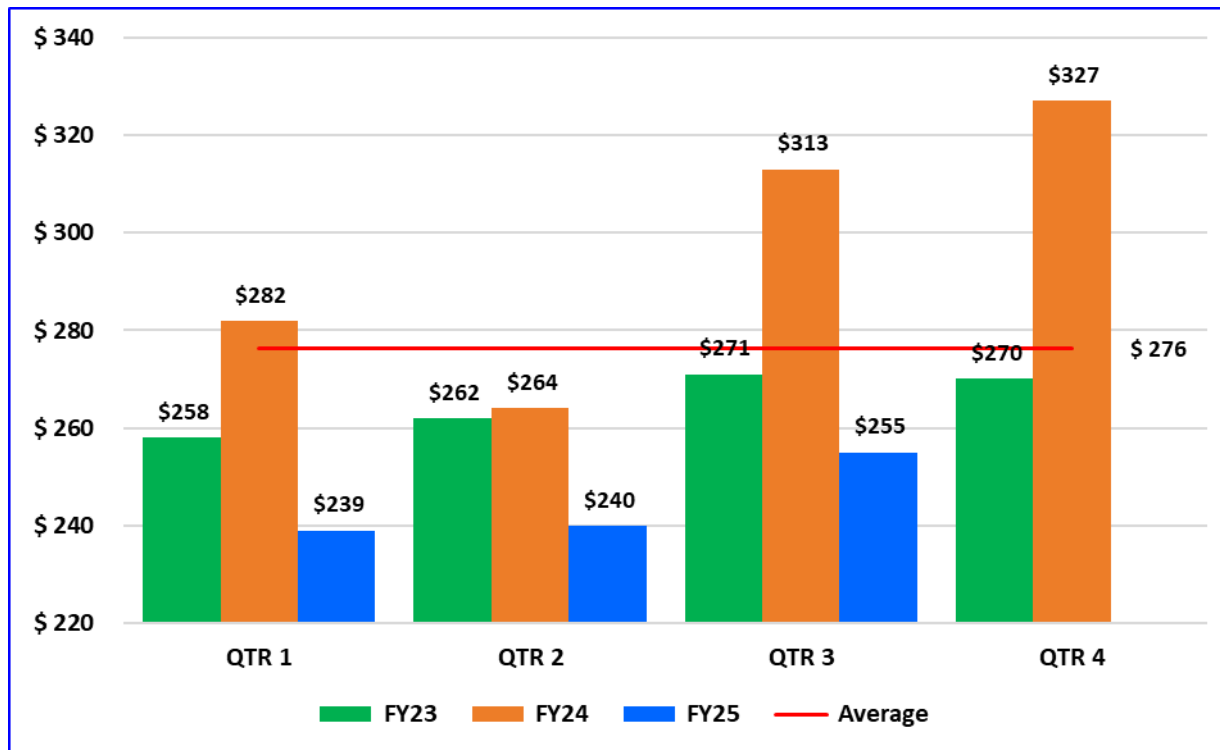
# System Farebox Recovery:



- Q3 FY25 Farebox Recovery is 14.9%, a year-over-year slight decline of 0.1% when compared to Q3 FY24. While Fares Revenue increased by almost 10% year-over-year, Operating Expenses outpace revenue growth due to the increase in FTEs during the implementation of Phases 1 & 2 of Reimagine METRO. The Cost increase of 11% in operating expenses contributed to the declining Farebox Recovery Ratio in Q3 FY25

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

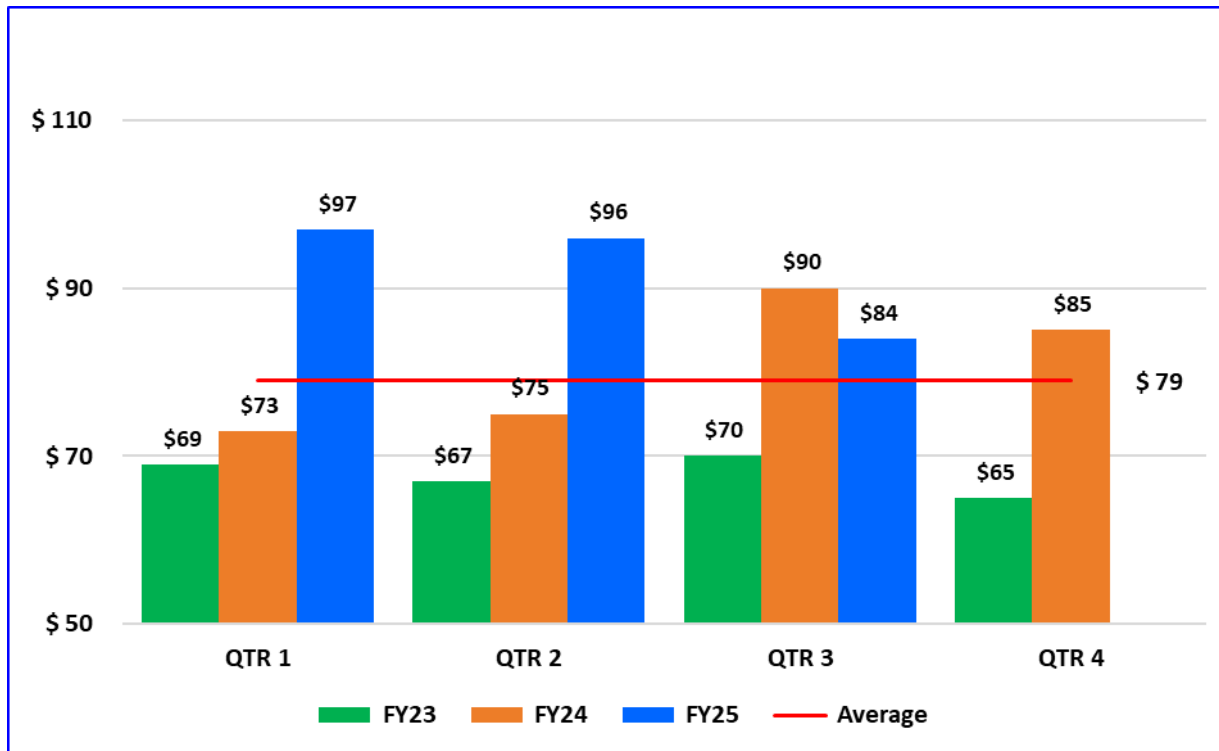
# Fixed Route/Commuter Cost per RSH



- Q3 FY25 Cost per RSH is lower by \$58, over prior year Q3 FY24 due to an increase in service hours of 13,269 or 33.9%

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

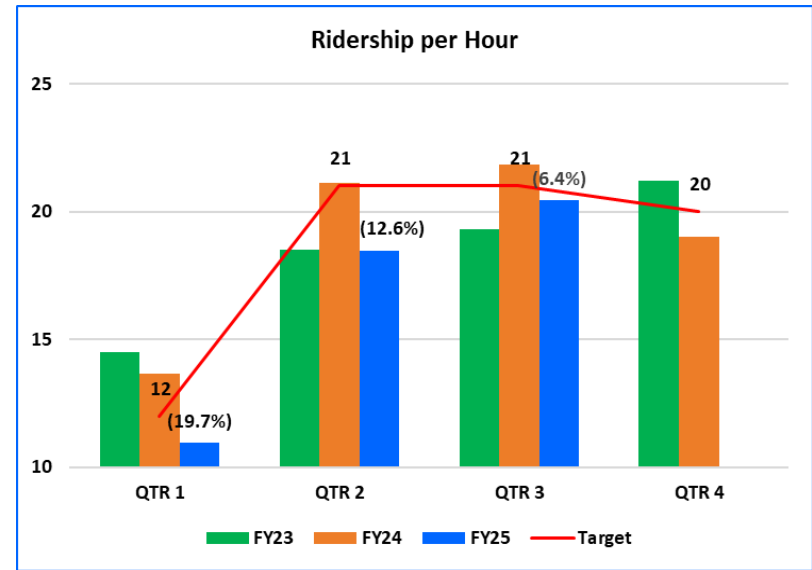
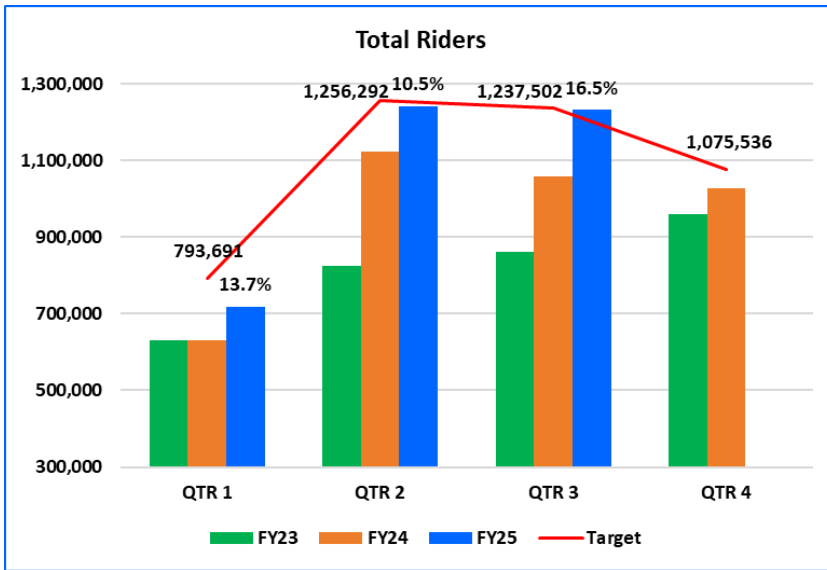


- Q3 FY25 Cost per Trip decreased \$6 from the prior year due to a decline in trips of 1,700, or 9.5%, and ParaCruz Costs declined \$262,192, or 16.1% when compared to the same period of FY24. Lower overtime, accrual payouts and worker's comp. expenses contributed to the cost reductions in Q3 FY25.

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)

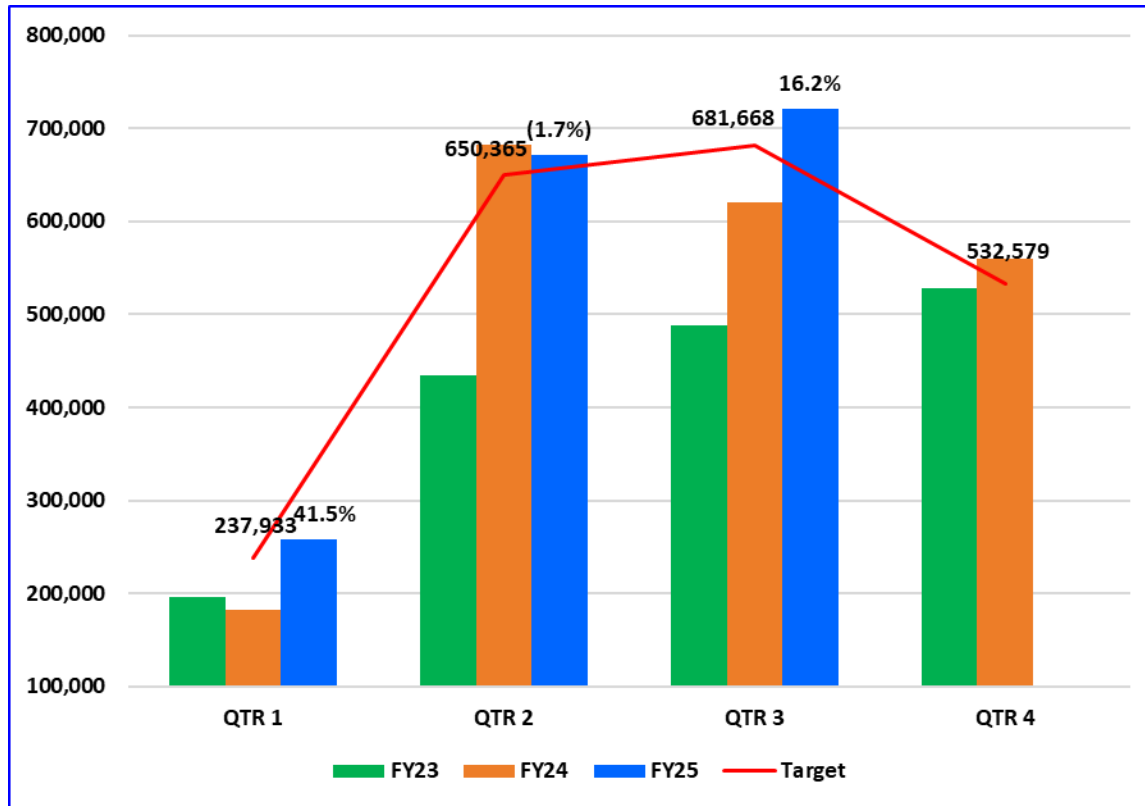


QTR 3				
Ridership	FY25	FY24	Variance	YoY Change
Local/Non-Student	327,305	301,195	26,110	8.7%
Student (UCSC, Cabrillo, K-12)	867,124	725,743	141,381	19.5%
Highway 17	38,695	31,299	7,396	23.6%

QTR 3				
Ridership	FY25	FY24	Variance	YoY Change
UCSC	720,542	620,321	100,221	16.2%
Cabrillo	59,338	37,545	21,793	58.0%
Youth	87,244	67,877	19,367	28.5%

The Quarterly Ridership/RPH Targets calculation is equal to 50% of the YOY quarterly service increase multiplied by the quarterly ridership from the previous year

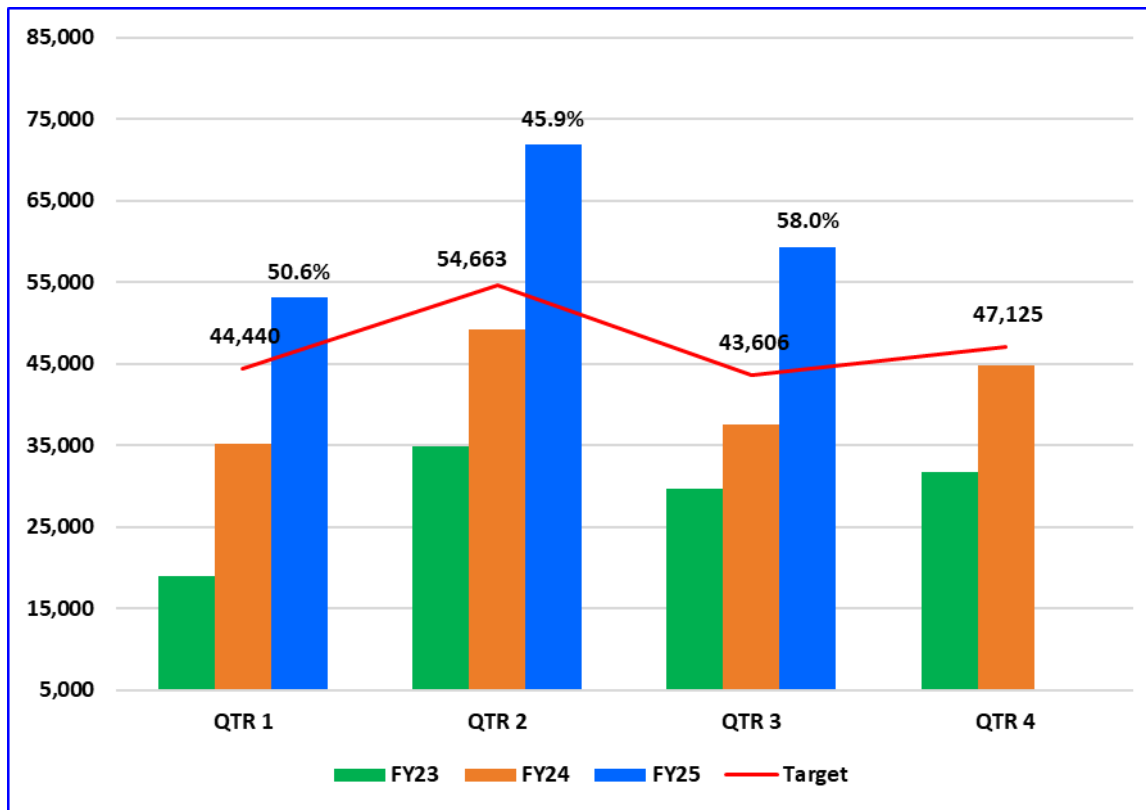
# UCSC Ridership



- Q3 Ridership increased 100,221, or 16.2% when compared to Q3 FY24. METRO operated 19.8% more vehicle revenue hours over prior year Q3.

The Quarterly Ridership Target calculation is equal to 50% of the YOY quarterly service increase multiplied by the quarterly ridership from the previous year

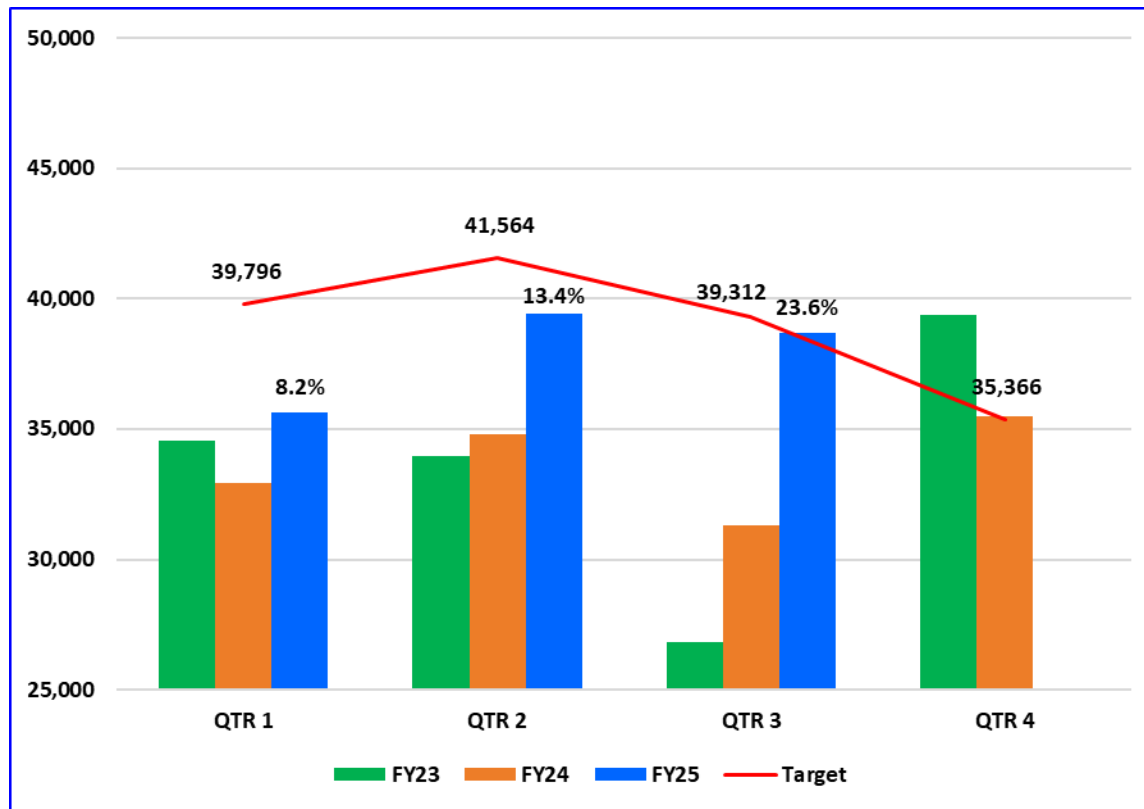
# Cabrillo College Ridership



- Q3 Ridership increased 21,793, or 58.0% compared to Q3 FY24. METRO operated 32.3% more vehicle revenue hours over prior year Q3

The Quarterly Ridership Target calculation is equal to 50% of the YOY quarterly service increase multiplied by the quarterly ridership from the previous year

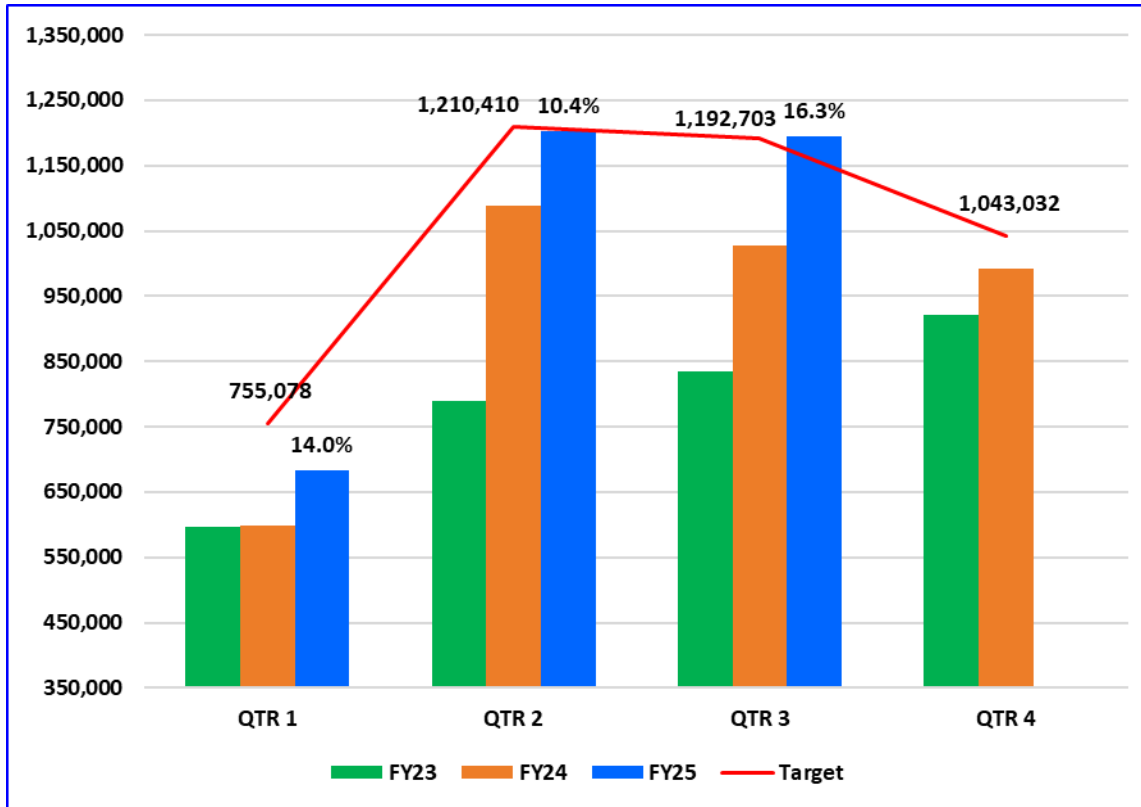
# Highway 17 Ridership



- Q3 Ridership increased 7,396, or 23.6% compared to Q3 FY24. METRO operated 51.2% more vehicle revenue hours over prior year Q3.

The Quarterly Ridership Target calculation is equal to 50% of the YOY quarterly service increase multiplied by the quarterly ridership from the previous year

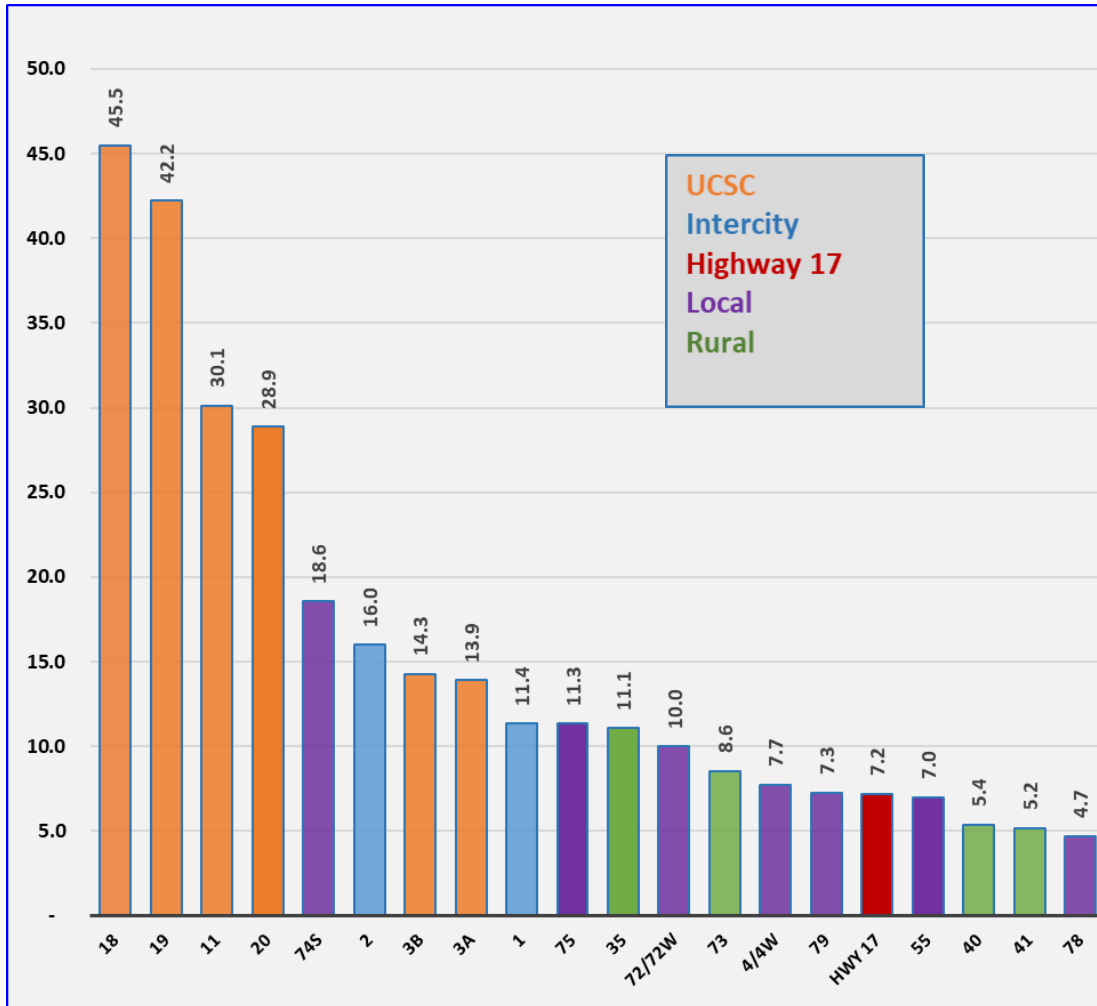
# Local Ridership



- Q3 Ridership increased 167,491, or 16.3% over prior year Q3. Although Metro operated 4.9% less service on all local routes, it did operate more vehicle revenue hours on routes 3A and 3B (23.3% and 15.9% respectively), which has the highest local ridership
  - . UCSC – 16.2% increase
  - . Cabrillo – 58.0% increase
  - . K-12 – 28.5% increase

The Quarterly Ridership Target calculation is equal to 50% of the YOY quarterly service increase multiplied by the quarterly ridership from the previous year

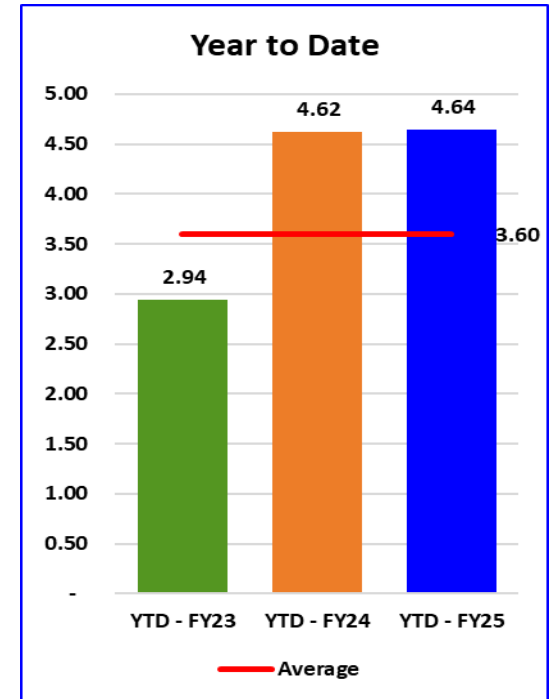
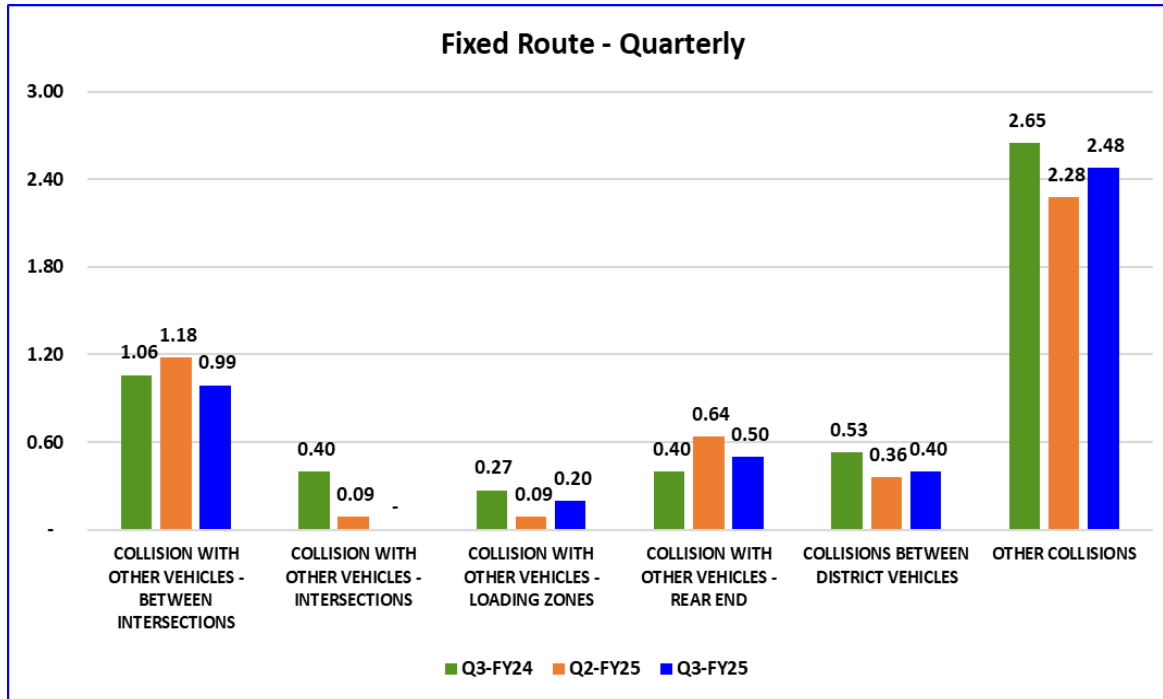
# YTD FY25 Passengers/Service Hours by Route



- Total Passengers/Service Hours were 17.2
- Combined UCSC Passengers/Service Hours were 34.7
- Combined Intercity Passengers/Service Hours were 12.3
- Combined Rural Passengers/Service Hours were 9.7
- Combined Local Passengers/Service Hours were 8.2
- Combined Highway 17 Passengers/Service Hours were 7.2

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

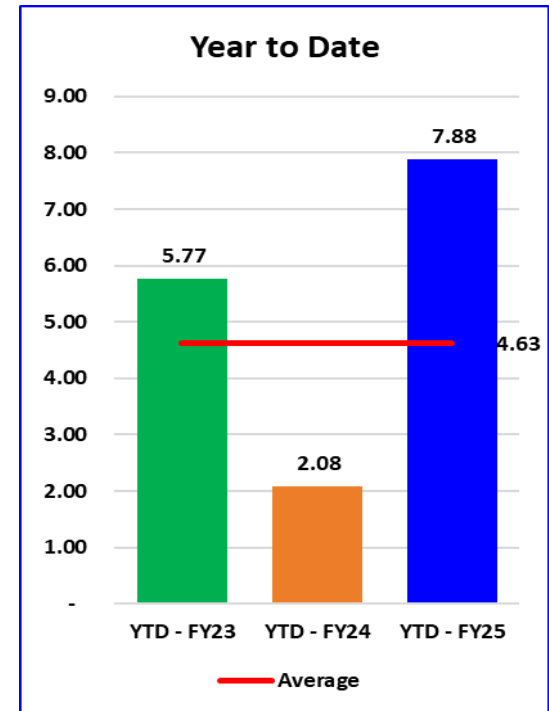
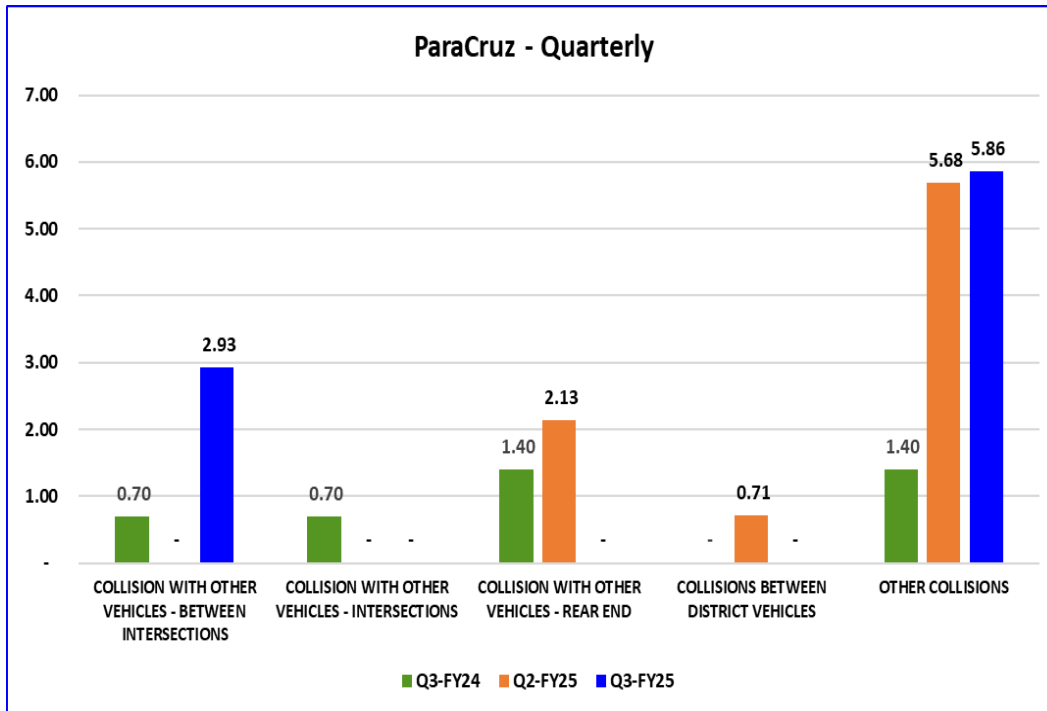
# Fixed Route - Traffic Accidents



**The YTD total is incident rate per 100,000 miles for *all* incidents (Collisions between/at intersections, fixed object and rear end collisions, along with collisions between District vehicles)**

- The numbers shown above are the Accident rate for each listed quarter based upon Total number of incidents in each category per 100,000 miles; which is the industry standard for reporting accidents. This number helps us to better compare previous quarters with each other especially when miles and passenger increases have occurred in the transit system such as Reimagine METRO
- The data shows that overall accidents in fixed route have gone down year-over-year
- YTD Accidents have gone up since FY23. This data is all accidents/incidents combined whether they are chargeable (the fault of the operator) or not
- Metro average of 3.60 is based on 3-year average of Total incidents per 100,000 miles (FY22, FY23, FY24); All Quarterly categories with events are shown

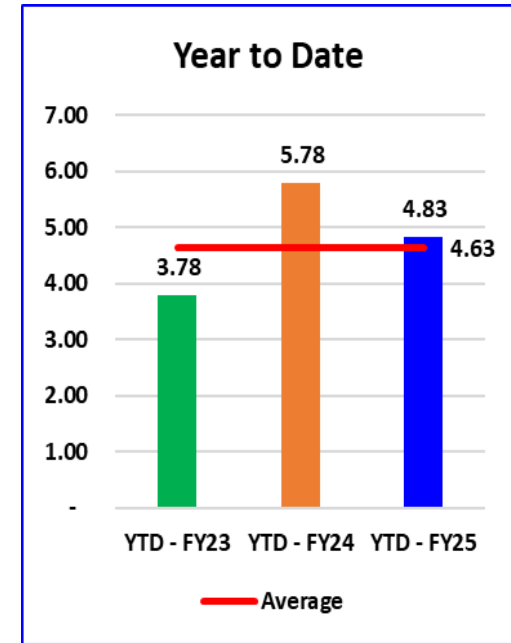
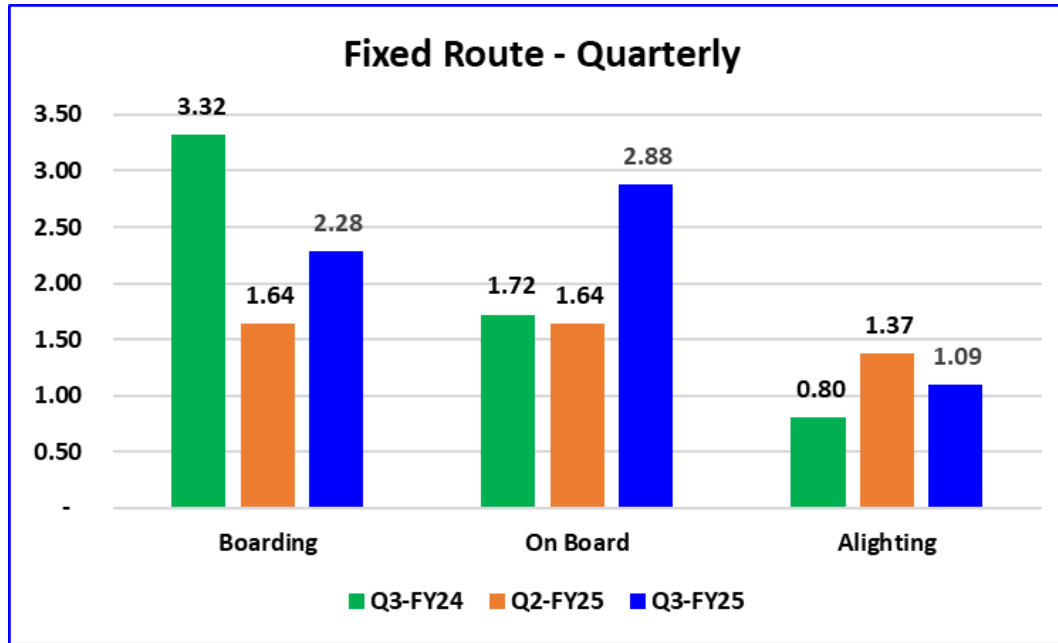
# ParaCruz - Traffic Accidents



The YTD total is incident rate per 100,000 miles for **all** incidents (Collisions between/at intersections, fixed object and rear end collisions, along with collisions between District vehicles)

- YTD ParaCruz Accidents have gone up since FY23. This data is all accidents/incidents combined whether they are chargeable (the fault of the operator) or not
- Rear end collisions and collisions between District vehicles went down to zero in Q3 FY25
- ParaCruz Accidents with other vehicles have gone up since Q2 FY25. This number incorporates all incidents regardless of whether it was the operator’s fault. Chargeability data lags a quarter, we will have a future slide that removes non-chargeables from the accident rate to compare next quarter
- Metro average of 4.63 is based on 3-year average of Total incidents per 100,000 miles (FY22, FY23, FY24); All Quarterly categories with events are shown

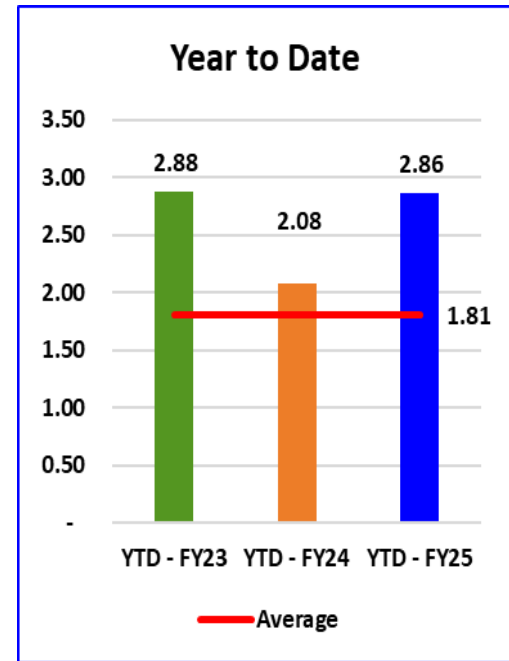
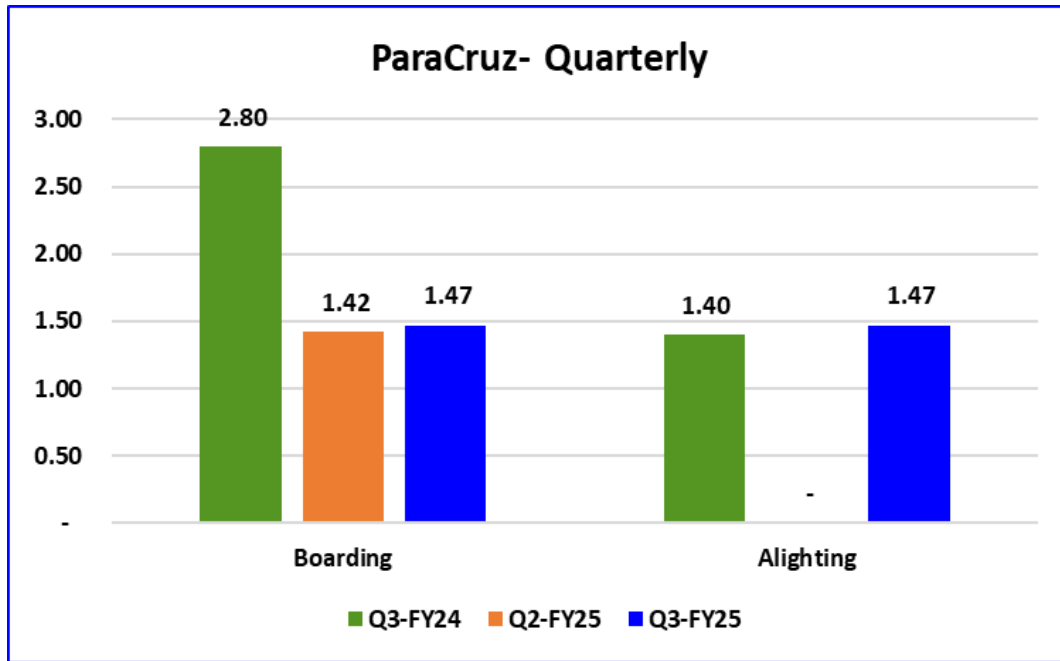
# Fixed Route - Passenger Incidents



**Incidents per 100,000 miles**

- The numbers shown above are the incident rate for each listed quarter based upon Total number of passenger incidents in each category per 100,000 miles which is the industry standard for reporting accidents. This number helps us to better compare previous quarters with each other, especially when miles and passenger increases have occurred in the transit system such as Reimagine METRO
- Most boarding/on board incidents occur when the passengers are using cell phones and not paying attention
- Boarding and On-Board passenger incidents have gone up since FY25 Q2. We will be monitoring this trend to see if mitigations are necessary
- Alighting passenger incidents have gone down since FY25 Q2
- Overall Boarding Passenger incidents have gone down since FY24 Q3
- YTD Ridership numbers are 2,315,824, 2,814,231, and 3,193,520 respectively for FY23, FY24, and FY25
- Metro Average of 4.63 is based on 3-year average total incident rate per 100,000 miles (FY22, FY23, FY24)

# ParaCruz - Passenger Incidents

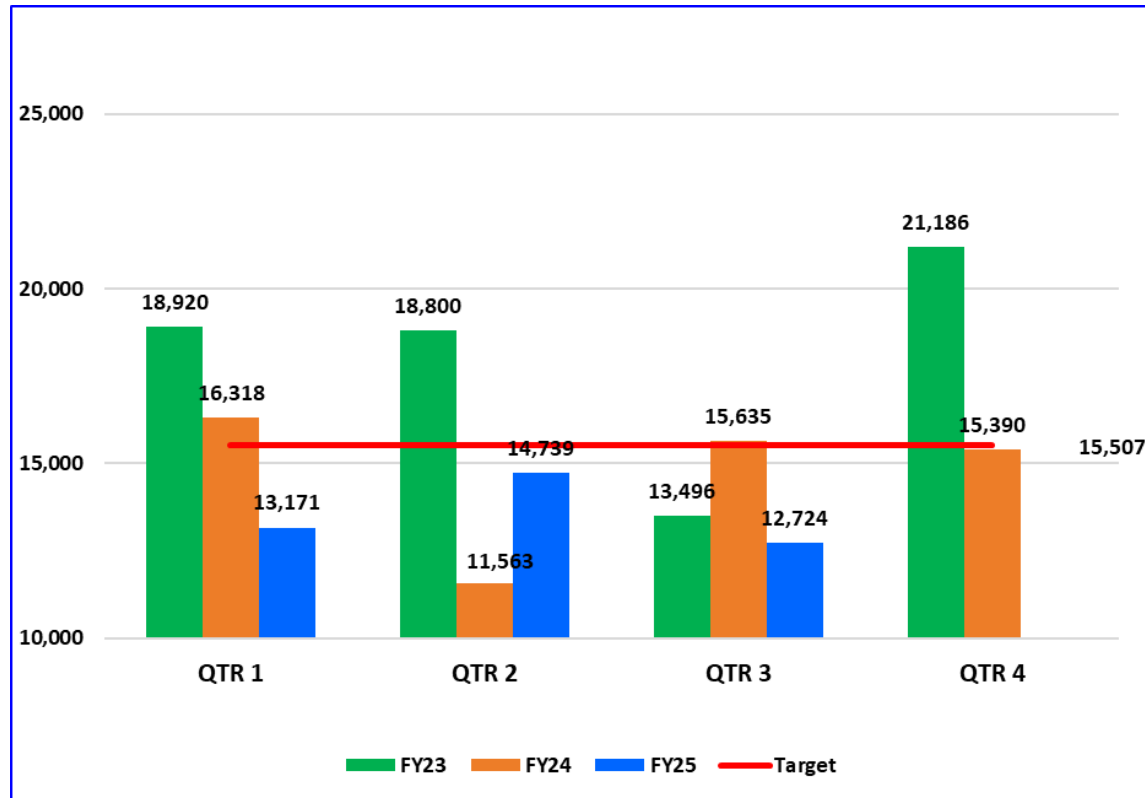


## **Incidents per 100,000 miles**

- Overall passenger incidents have gone down over prior year Q3 FY24
- Total YTD passenger incidents have gone up
- Most boarding/on board incidents occur when the passengers are using cell phones and not paying attention
- YTD PC trips are 56,359, 55,556, and 48,190 respectively for FY23, FY24, and FY25
- Metro Average of 1.81 is based on 3-year average per 100,000 miles (FY22, FY23, FY24)

# **Reliability KPI's**

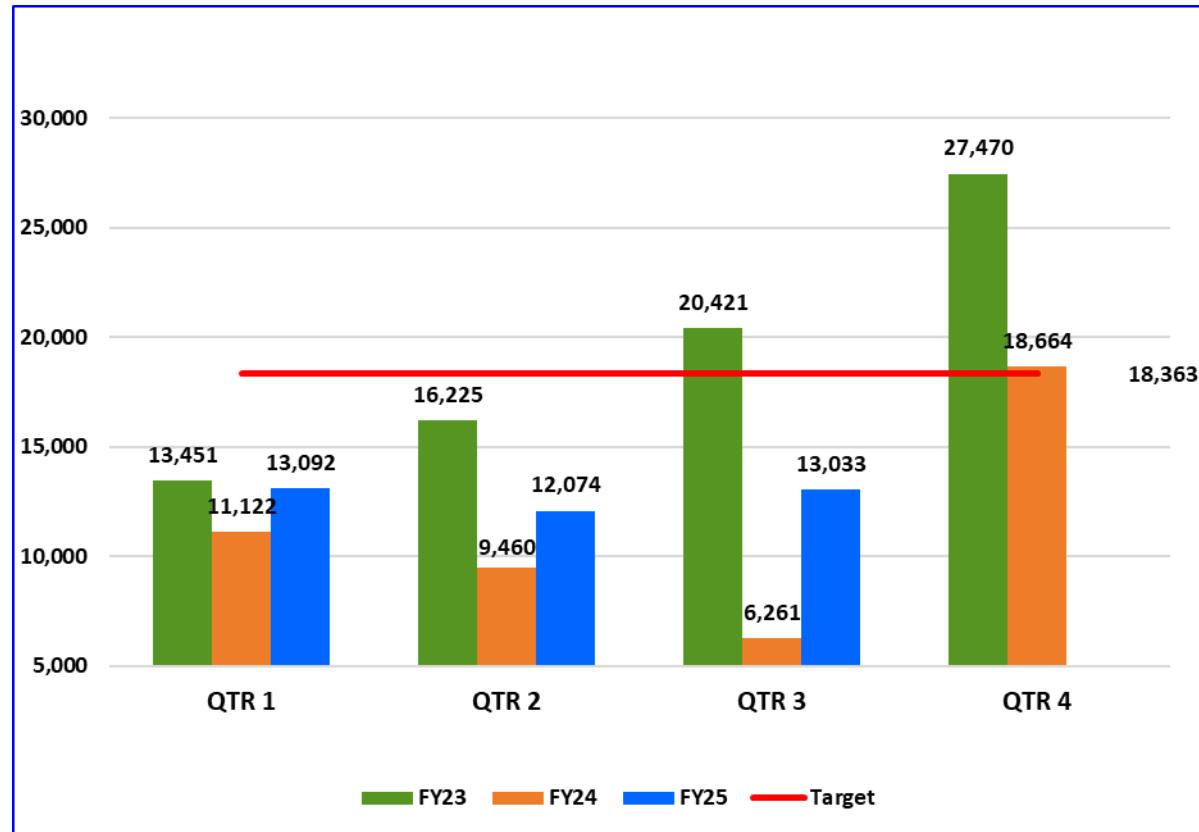
# Mean Miles Between Chargeable Road Calls – Fixed Route (Local)



- Q3 FY25 mileage between calls decreased by 2,911, total miles increased by 224,181, and road calls increased by 27 when compared to the same time period in FY24, resulting in a lower mileage between calls
- Chargeable road calls in Q3 FY25 were 19 in January, 18 in February, and 31 in March

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

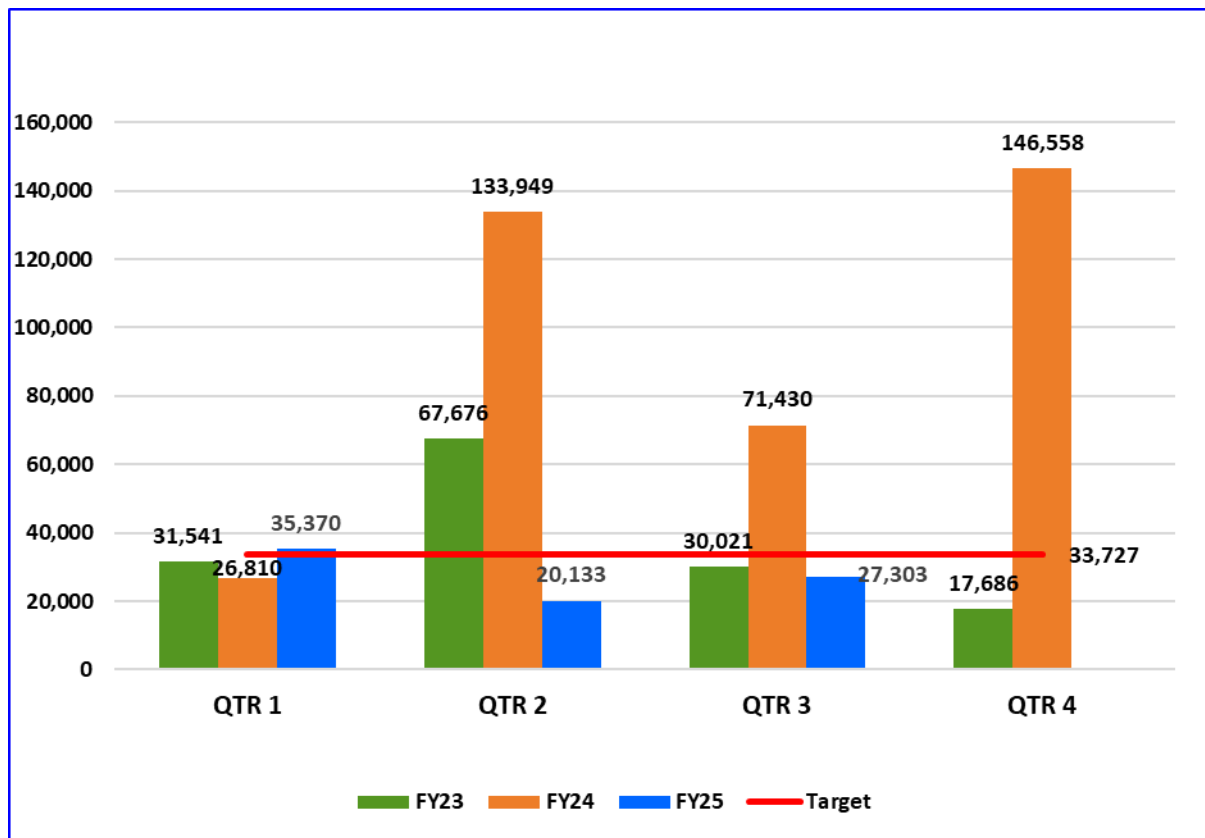
# Mean Miles Between Chargeable Road Calls – Highway 17



- Q3 FY25 mileage between calls increased by 6,772 in correlation with total miles increasing by 30,659 and road calls decreasing by 7 when compared to the same time period in FY24
- Chargeable road calls in Q3 FY25 were 4 in January and February, and 3 in March

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

# Mean Miles Between Chargeable Road Calls – ParaCruz

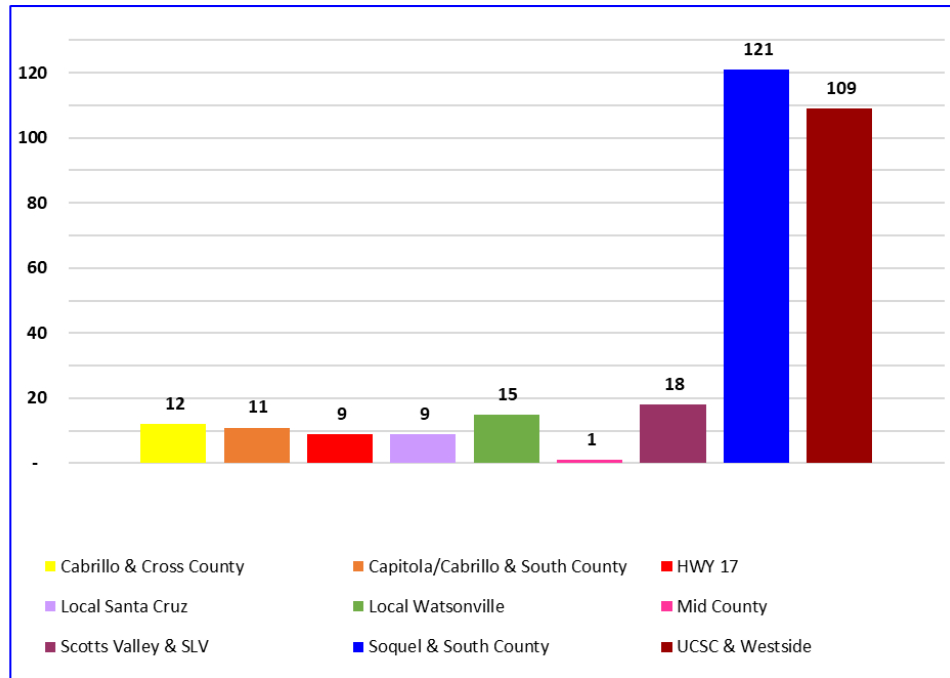
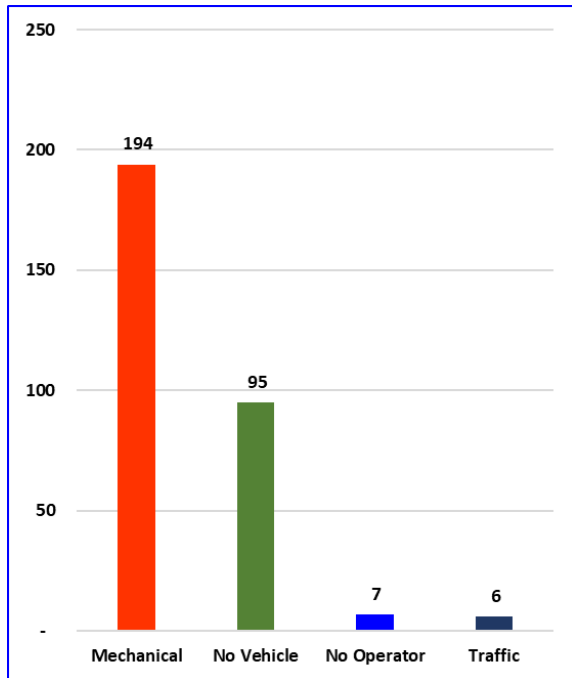


- Q3 FY25 mileage between calls decreased by 44,127 while road calls increased by 3. Average mileage is derived by total miles divided by road calls and only 2 road calls in Q3 FY24, resulted in a high variance compared to current Q3
- Chargeable road calls in Q3 FY25 were 2 in January, 3 in February, and 0 in March

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

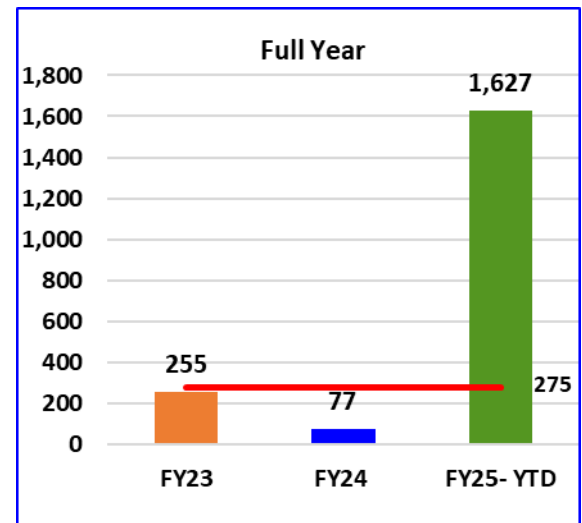
# **Dependability KPI's**

# Cancelled Trips by Cause & Region

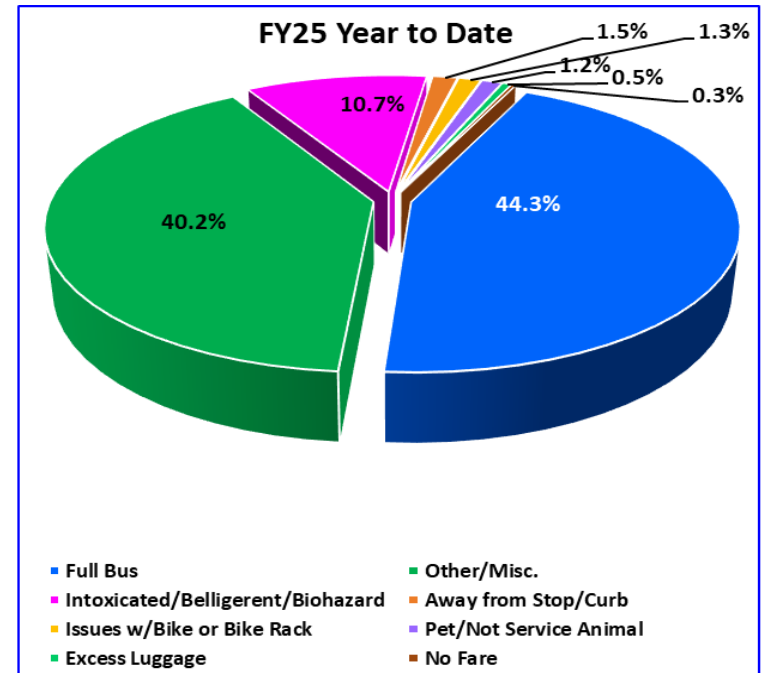
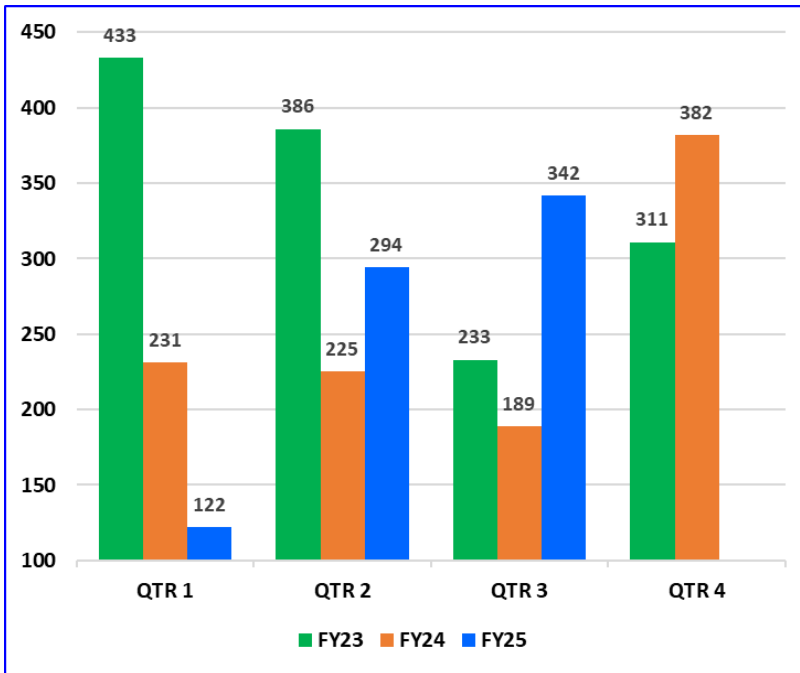


- There were 198 cancelled trips in Q4 FY25 – 110 in January, 60 in February and 135 in March primarily due to mechanical and no vehicle issues
- Nine regions were impacted – Cabrillo & Cross County, Capitola/Cabrillo & South County, HWY 17, Local Santa Cruz, Local Watsonville, Mid County, Scotts Valley & SLV, Soquel & South County, and UCSC & Westside

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

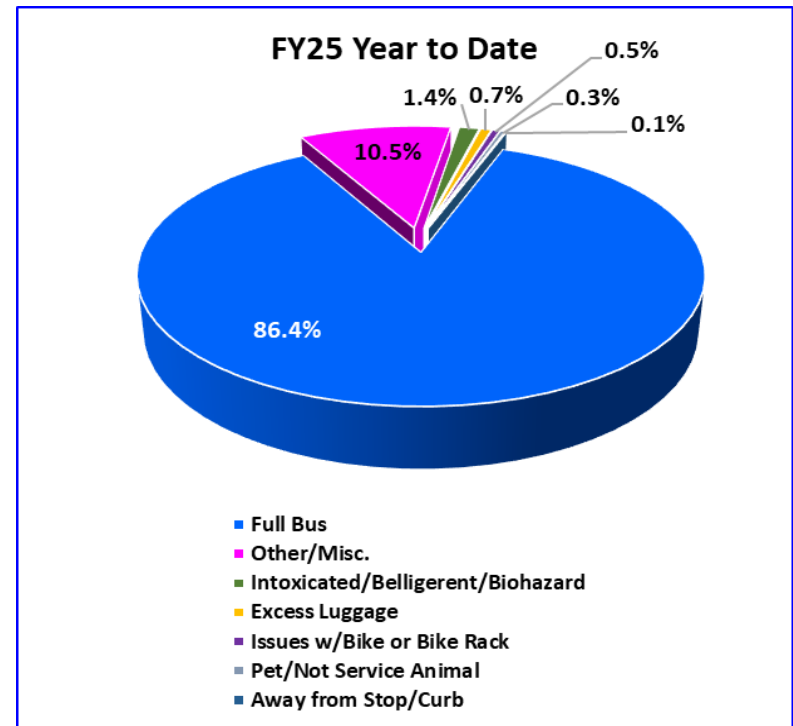
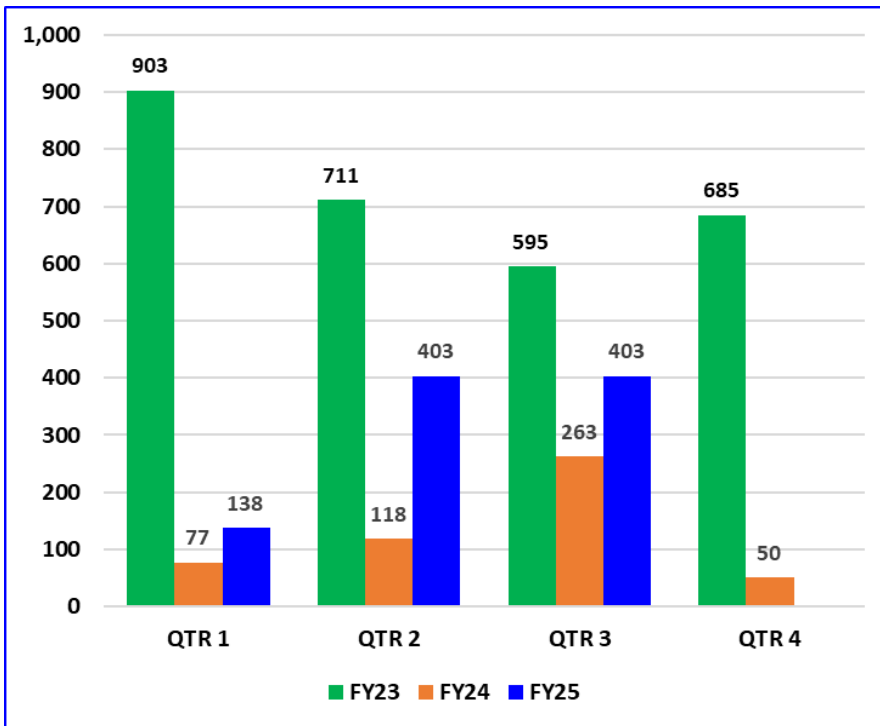


# Pass-Ups by Quarter/Reason – Fixed Route



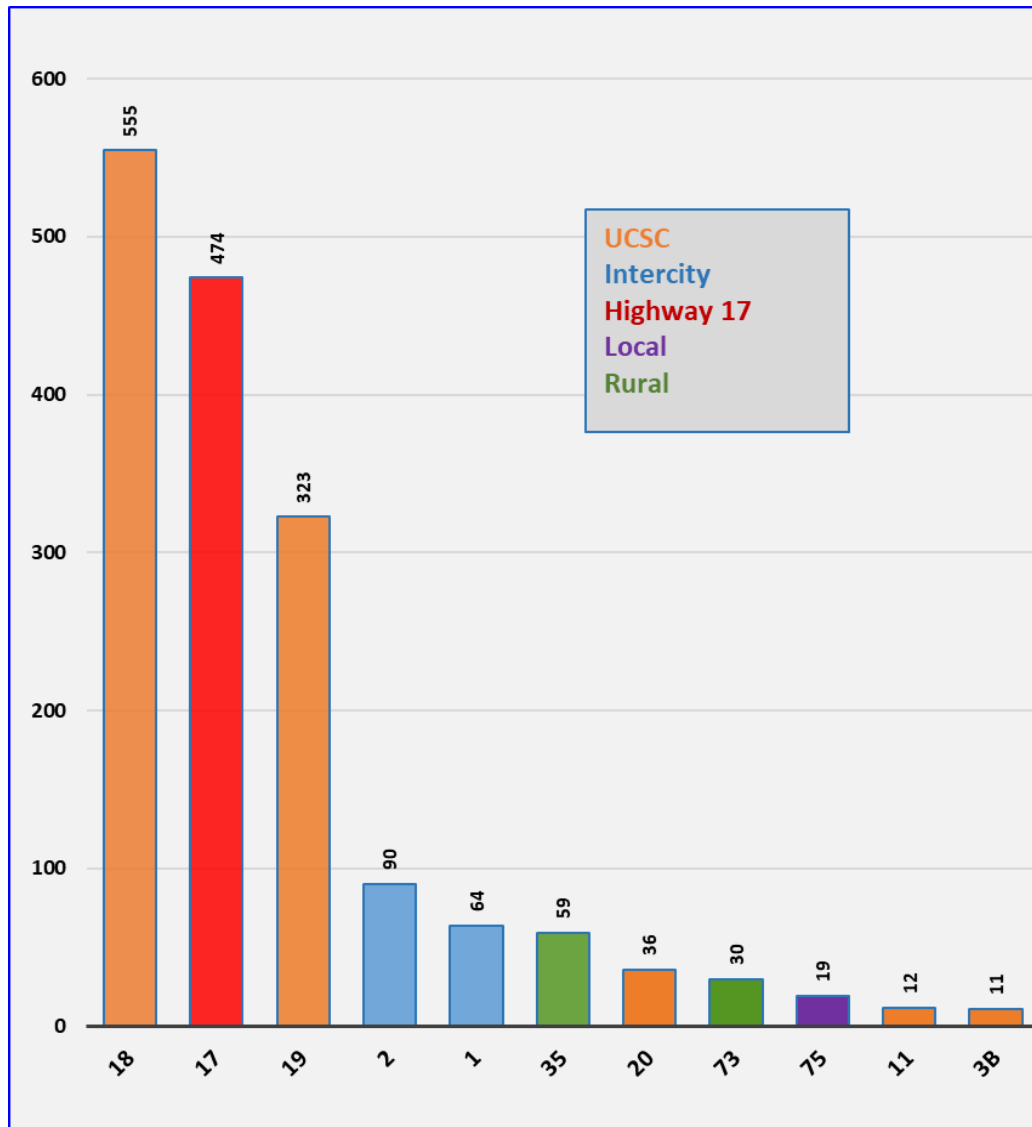
- In Q3 FY25, total pass-ups were 342, which is 153 (81.0%) higher when compared to Q3 FY24
- January had an increase of 145 pass-ups (241.7%), February had an increase of 49 (92.5%), and March had a decrease of 41 (53.9%) when compared to the same time period as FY24
- 44.3% of Year-to-Date total pass-ups are caused by full bus capacity, followed by 40.2% Other/Misc, which covers a wide range of issues (such as Surfboards, No Shoes, Smoking/Vaping, and Hygiene to name a few), and 10.7% due to Intoxicated/Belligerent/Biohazard, all other categories are 1.5% or less

# Pass-Ups by Quarter/Reason - UCSC



- In Q3 FY25, total pass-ups were 403, which is 140 (53.2%) higher when compared to Q3 FY24
- There were increases across all months - January had 80 pass-ups (41.7%), February had 54 (96.4%), and March had 6 (40.0%) when compared to the same time period as FY24
- 86.4% of Year-to-Date total pass-ups are caused by full bus capacity, followed by 10.5% caused by Other/Misc., all other categories are 1.4% or less

# YTD FY25 Pass-Ups by Route\*



- YTD Pass-ups total 1,702
- UCSC Routes comprised 944 (55.5%), of which 86.4% were due to full bus capacity
- Highway 17 Routes comprised 474 (27.8%), of which 63.7% were due to full bus capacity
- Intercity Routes comprised 162 (9.5%), of which 50.6% were due to Other/Misc.
- Rural Routes comprised 90 (5.3%), of which 42.2% were due to Other/Misc.
- Local Routes comprised 32 (1.9%), 68.8% 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
<p><b>Financial Performance</b></p>	<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>
<p><b>Productivity</b></p>	<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
<b>Risk Management &amp; Safety</b>	<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, such as passenger falls, 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>The metric is calculated using the accident rate based on a formula that shows how many incidents of each category occur per 100,000 revenue miles driven. This helps to compare safety performance for each quarter even as overall revenue miles change.</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>
<b>Reliability</b>	<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%	14.4%
Fixed Route/Commuter Cost/RSH	211	298	271	247	296	244
ParaCruz Cost/Trip	72	181	91	69	80	92
Monthly Mean Miles Between Chargeable Road Calls - Fixed Route	13,216	13,695	15,401	17,602	14,494	13,509
Monthly Mean Miles Between Chargeable Road Calls - Highway 17	24,126	18,016	18,699	18,341	9,959	12,700
Monthly Mean Miles Between Chargeable Road Calls - ParaCruz	44,329	53,393	29,626	29,729	66,326	26,183
Annual Road Miles - Fixed Route	2,443,157	1,999,474	2,325,531	2,358,618	2,594,510	2,728,898
Annual Road Miles - Highway 17	562,616	324,281	373,984	403,492	468,091	482,585
Annual Road Miles - ParaCruz	623,119	373,748	503,650	505,399	530,608	418,927