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TRANSMITTAL DATE: April 18, 2025

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TO: Board of Directors

FROM: Lisa Bahr, Chief Customer Experience Officer

SUBJECT: Quarterly KPI Report, FY25 Q2

Issue

This report responds to the Board's request for performance metrics that are more clearly aligned with the Authority's core mission. The Key Performance Indicators (KPI) presented in this report are for the second quarter of FY25 and align with the Authority's Strategic Business Plan.

Recommendation

Receive and file.

Strategic Commitment

This report aligns with the Strategic Business Plan commitment of:

- **Modernizing Business Practices:** We will improve our operational efficiency through transparency, objective metrics and streamlined governance, reducing over-reliance on subsidy while bringing our system into a state of good repair and investing in the development of our employees. This Quarterly KPI Report provides objective metrics to transparently communicate the performance of key system aspects.

Background

At the July 12, 2024 meeting of the Audit and Finance Committee, Directors Krekorian and Berkson requested a broader range of metrics and benchmarks against which to evaluate the Authority's performance. These metrics should go beyond the regularly reported ridership and

financial stats and would help guide the Board in its decision-making process.

The Finance, Operations, Customer Experience, Strategy, and the Safety and System Security Departments have identified Key Performance Indicators and metrics for their respective departments. This report template with performance data for the second quarter is being presented for Board review. Comments and suggestions from the Board will be incorporated in the next report for the third quarter of FY25 which will be presented on June 13, 2025.

Discussion

Every month, the Authority's Finance Department reports financial performance and ridership data against budget projections. While these reports inform the Board of the Authority's financial health, they do not provide a broader context against which to evaluate the financial investments.

Following the Board's request, staff has identified five KPIs that follow the strategic direction that is laid out in the Board-approved Strategic Business Plan. These KPIs correspond to:

1. Financial Sustainability
2. Safety and Security
3. Service Reliability
4. Access and Mobility
5. Strategic Partnerships

Each KPI is associated with metrics that track Metrolink's performance over time. The current report covers the second quarter of FY 2025 (October – December 2024) with comparative data for FY 2024. Results will be updated each quarter and reported to the Board. Some of the financial metrics and benchmarks are available annually only and will be reported to the Board once per year. Benchmark data for other peer commuter rail agencies comes from the National Transit Database (NTD) data which is lagged by two years or more.

Key Performance Indicator (KPI) Results, FY25Q2

1. Financial Sustainability KPI

In addition to the KPI metrics below, Finance staff will continue to provide monthly updates on Revenue, Ridership and Financial outcomes to keep the Board informed of the current financial performance of the Authority.

Farebox Revenue Per Train Mile by Line

The overall system farebox revenue by train mile has decreased approximately 58% as compared to the pre-pandemic period (FY19) which was \$28.08. However, there has been a steady but slow recovery from the low of \$6.37 (FY21) to \$11.87 (FY24). The Orange County line continues to perform above the annual system average.

Cost Per Train Mile by Line

The overall system cost by train mile has increased approximately 23% as compared to the pre-pandemic period (FY19) which was \$85.38. The Orange County and San Bernardino lines

continues to perform below the annual system average.

Farebox Recovery Ratio by Line

The overall system farebox recovery ratio has decreased approximately 22 points as compared to the pre-pandemic period (FY19) which was 33% points. We have experienced a slow recovery from the low of 6% points (FY21) to 11% points (FY24). All lines have recovered by approximately 5% points (FY24). The Orange County line continues to perform above the annual system average and by 11% points (FY24).

Comparison to Other Transit Agencies

Cost Per Train Mile

Metrolink has among the highest agency cost per train mile. Metrolink is approximately \$7.00 more than pre-pandemic period (FY19).

Farebox Revenue Per Train Mile

Metrolink has the lowest agency farebox revenue per train mile. Metrolink is approximately \$3.00 less than pre-pandemic period (FY19). Other agencies are down on average approximately \$5.00 lower than pre-pandemic period (FY19). These results are driven by the variance in passenger count.

Farebox Revenue Recovery Ratio

Metrolink is among the lowest agencies for farebox revenue recovery ratios. Metrolink is approximately 21% points less than pre-pandemic period (FY19). Other agencies are down on average approximately 35% points lower than pre-pandemic period (FY19). These results are driven by the variance in passenger count.

2. Safety and Security KPI

Crimes and reported unruly passengers on Metrolink system saw a decrease in FY25 Q2 compared to FY25 Q1. In FY25 Q2, Crime Against People were 7 (FY25 Q1: 11), a decrease of 36%, Crimes Against Property were 3 (FY25 Q1: 7), a decrease of 57%, and FY25 Q2 reported unruly passengers were 227 (FY25 Q1: 349), a decrease of 35%.

3. Service Reliability KPI

Metrolink assesses service reliability by monitoring on-time performance (OTP) across the system and for each host railroad. This granular data collection enables us to evaluate the performance of Southern California Regional Rail Authority (SCRRA) trains across various railroads. We independently measure each host railroad's performance to ensure equitable treatment of our trains, identify delay patterns, and maintain a high standard of accountability. Our internal target is to achieve a 95% OTP rate, excluding third-party delays.

- Third-party delays, which are beyond Metrolink's control and occur off Metrolink property, encompass events such as adverse weather, police activity, trespasser incidents, debris strikes, and other uncontrollable anomalies.
- SCRRA OTP specifically measures delays within SCRRA's control, including but not limited to routing, mechanical, and signal issues, while excluding third-party delays. In contrast, RAW OTP captures all delays throughout the Metrolink service area,

irrespective of fault, and includes third-party delays.

This comprehensive approach to performance measurement allows us to identify areas for improvement, collaborate with host railroads to optimize service, and provide transparent reporting to stakeholders.

In Q2, Metrolink's systemwide on-time performance (OTP) averaged 78.1% RAW and 89.2% SCRRA-responsible (including Arrow). Key delay contributors included:

1. Freight Train Interference: Impacting Orange County, 91 Perris Valley, Riverside, and Inland Empire-Orange County Lines across BNSF and UPRR territories. Staff actively collaborates with freight operators through daily interventions and weekly operational reviews to mitigate delays.
2. Commuter Train Interference: Affecting the San Bernardino Line following the October 21, 2025, schedule change.
3. Police Activity: Elevated vandalism to infrastructure and freight train robberies affected all lines.
4. Metrolink continues to address these challenges through proactive coordination with host railroads and stakeholders to enhance service reliability and meet our 95% SCRRA-responsible OTP goal.

Line-Specific Q2 Performance:

Ventura County Line: 86.6% RAW OTP, 94.0% SCRRA-responsible. Primary delays: police activity (vandalism, vehicle strikes), signal issues (UPRR-related, over 50% of delays), and passenger train interference from late UPRR trains disrupting meet/pass schedules.

Antelope Valley Line: 88.8% RAW OTP, 92.9% SCRRA-responsible. Key delays mirrored Ventura County Line: police activity, signal issues (UPRR-driven), and passenger train interference.

San Bernardino Line: 61.8% RAW OTP, 66.6% SCRRA-responsible. Major delays: commuter train interference post-October 21 schedule change, police activity (vandalism, unruly passengers), and signal delays exacerbated by train volumes and meet/pass disruptions.

Riverside Line: 74.7% RAW OTP, 97.7% SCRRA-responsible. Leading delays: freight train interference (dominant factor), trespasser incidents (including strikes), and police activity (vandalism, freight robberies).

Orange County Line: 68.2% RAW OTP, 92.5% SCRRA-responsible. Main delays: freight train interference, police activity (vandalism, freight robberies), and routing issues tied to BNSF's dispatch relocation to Fort Worth and new dispatchers.

91 Perris Valley Line: 58.2% RAW OTP, 94.9% SCRRA-responsible. Top delays: freight train interference, police activity (vandalism, freight robberies), and routing issues linked to BNSF's dispatch changes.

Inland Empire-Orange County Line: 67.8% RAW OTP, 96.1% SCRRA-responsible. Primary delays: freight train interference, routing issues (BNSF dispatch transition), and Maintenance of Way challenges (field clearances, broken rails).

4. Access and Mobility KPI

This KPI is aligned with the Authority's broader equity framework that positions Metrolink to serve historically marginalized populations and to help achieve better outcomes for the riding public and the region as a whole. It measures the affordability of Metrolink's service which is an important measure of access for many disadvantaged populations. Subsidized fare discounts reduce the cost individuals pay for their Metrolink ticket and help increase the mobility of low-income individuals, seniors and disabled riders, as well as students.

Metrolink service helps reduce Vehicle Miles Traveled (VMT) which translates into reduced congestion, lower fossil fuel consumption, and air quality benefits for Southern California.

- During the second quarter, the average price paid per trip by Metrolink riders fell to \$4.43. This is the lowest in Metrolink's history and makes Metrolink one of the most affordable commuter railroads. It reflects the growing number of riders who enjoy discounted fares, including the free Student Adventure Pass.
- During the second quarter, more than one in three (34.1%) trips were made by students using the free Student Adventure Pass. It reflects a nearly 62% increase in student ridership.
- Senior and disabled riders accounted for 16.3% of ridership during the second quarter. While that share is down from a year ago, total ridership by seniors and disabled individuals is up by 12.8%.
- Metrolink's Mobility-4-All program offers a 50% discount for low-income riders. This discount can be combined with other discounts for up to 75% savings over the regular fare. Mobility-4-All ridership accounted for about 3% of total Metrolink boardings.
- Metrolink riders avoided more than 30 million VMT of freeway travel by taking the train. This is an increase of 27.5% compared to the same quarter of the prior year and reflects the increase in ridership over the same period of time.

5. Strategic Partnerships

Lastly, we have Key Performance Indicators related to creating and sustaining Strategic Partnerships to achieve goals for capital investment and service development. Given the nature of strategic partnerships as requiring a long-term investment in relationships with other entities and involving achievements of varying size and impact, KPIs to characterize progress in Strategic Partnerships is described in qualitative terms. There are some quantitative ways to describe the impact of Strategic Partnerships, but these tend to be close to quantitative financial measurements already presented. Other quantitative ways are focused on the process of coordinating with a strategic partner and the achievement of process-oriented objectives, such as frequency of coordination or evaluation of the efficacy of partnership meetings. It is useful to characterize the nature of the partnership with each of the key partners and to describe whether the interaction is achieving end objectives with efficacy.

Over time, it will be possible to characterize the efficacy and value of each of the partnerships through surveying. At this stage, only a high-level description of the relationship is possible. There are three categories of strategic partners:

- Other Rail Operators in the service territory (Brightline West, California High Speed Rail Authority, and the Los Angeles – San Diego – San Luis Obispo Rail Corridor (LOSSAN Corridor Agency);
- Host Freight Railroads (Burlington Northern Santa Fe (BNSF) Railway and Union Pacific

Railroad (UPRR);

- Transportation Network and Service Development Partners (the California Department of Transportation (Caltrans) and the Southern California Association of Governments (SCAG).

For this past Q2 period, the level of engagement and resolution of issues was generally similar among various partner agencies. With respect to Other Rail Operators, Metrolink benefits from a monthly meeting with each of the three operators covering topics such as design of the Rancho Cucamonga transfer interchange point and the Major achievements in Q2 are the development of comments to the CHSRA on the Los Angeles to Anaheim segment. Coordination with host freight railroads also aims for a monthly cadence of meetings, but meeting times are less regular due to the more erratic nature of freight railway operations and availability of key decision makers. Metro Interactions with SCAG and Caltrans has typically been on an as-needed basis rather than at pre-determined intervals. Caltrans and SCAG have proven to be invaluable sources of revenue to support a demonstration of Open Loop fare payment system.

Next Steps

This KPI Report will be provided to the Board on a quarterly basis. The next report for the third quarter of FY25 (January-March 2025) will be presented to the Committee at its meeting on June 13, 2025.

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Attachment(s)

[Attachment A - Quarterly KPI Report FY25Q2](#)