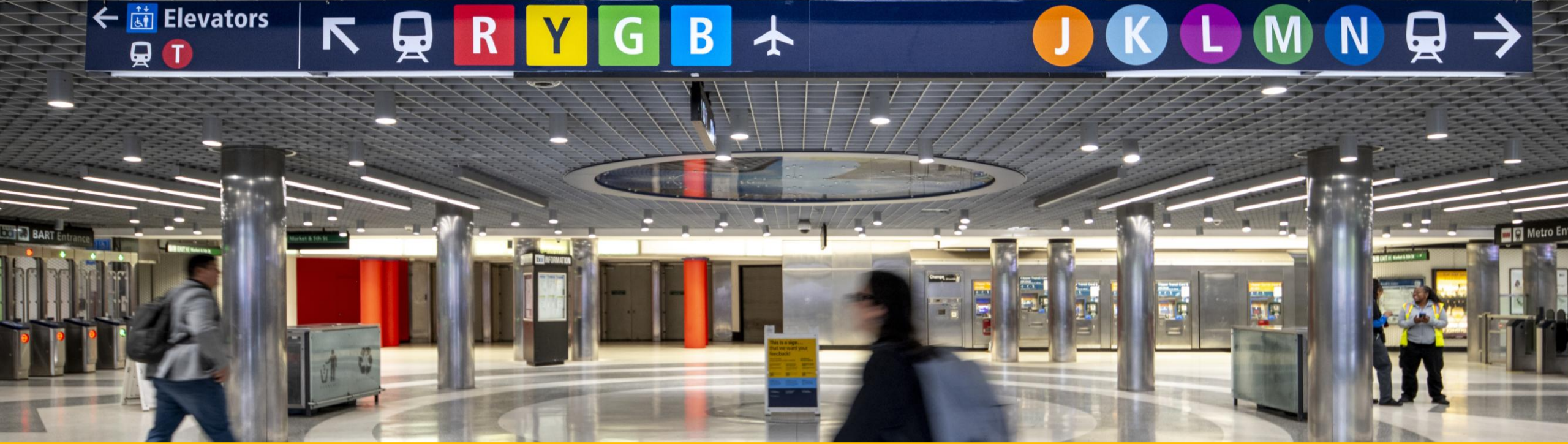




# Regional Network Management: Transforming the Rider Experience

RNM Customer Advisory Group  
November 18, 2025

Agenda Item 4b – Attachment A



**METROPOLITAN  
TRANSPORTATION  
COMMISSION**

# Today's Focus

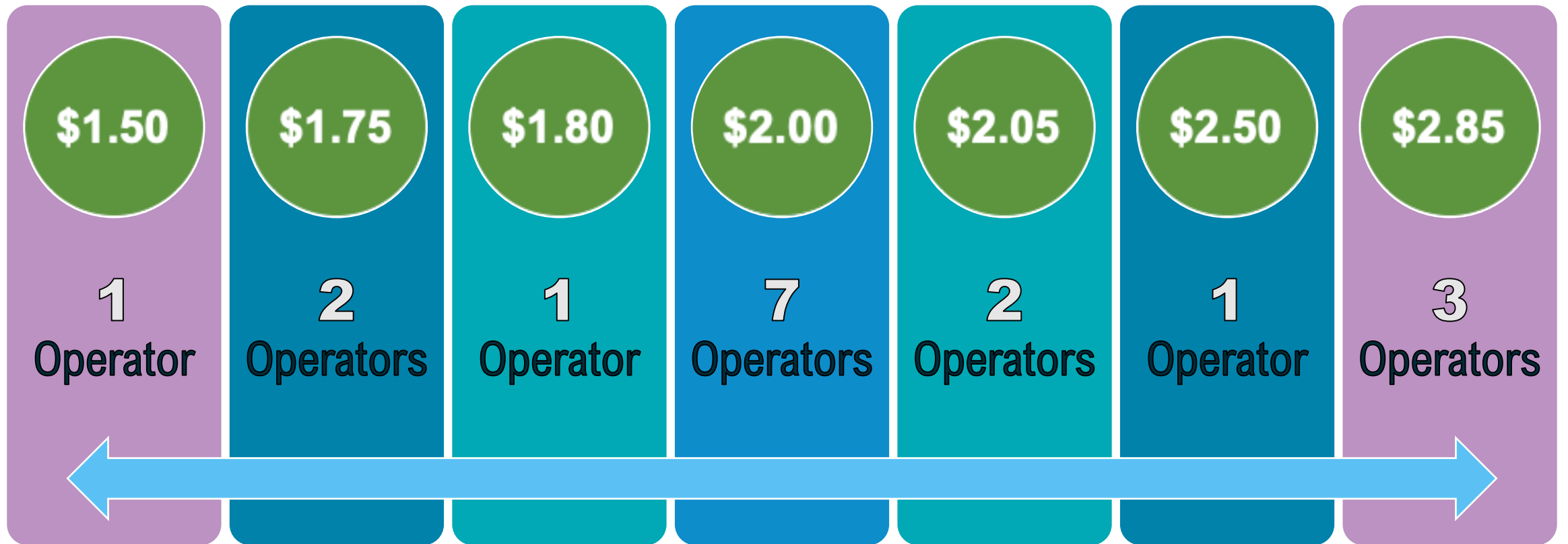
## Fares & Payment

Simpler, consistent  
and equitable fares



# Bay Area's Transit Fares and Products

The Bay Area is served by over two dozen transit operators with a range of fares and fare structures.



# Other Fare Types

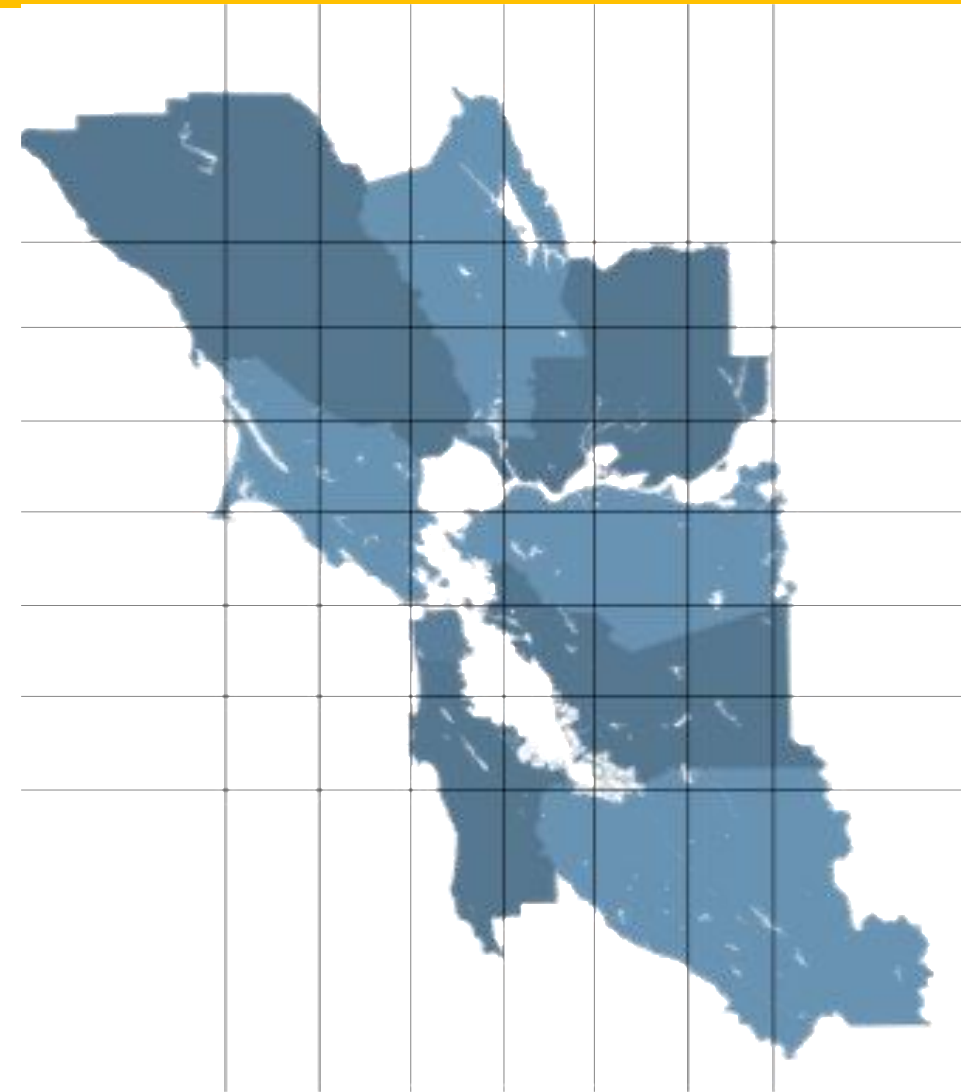
## Distance/Route Based Fares

### **+/- 10 miles**

- ▶ ACE
- ▶ BART
- ▶ Golden Gate Ferry
- ▶ WETA

## Zone Based Fares

- ▶ Caltrain
- ▶ Golden Gate Transit
- ▶ SMART
- ▶ Sonoma County Transit



# Offers a Pass Product



# Does Not Offer Pass Product:



# Clipper: Backbone for Regional Fare Integration



Photo: Noah Berger

## 4 Million

Active Accounts  
Used in Last 30 Days



Each Month

## \$36 Million

In Fares Collected

## Tap and Ride

## 10%

Already used for  
of all BART trips



METROPOLITAN TRANSPORTATION COMMISSION

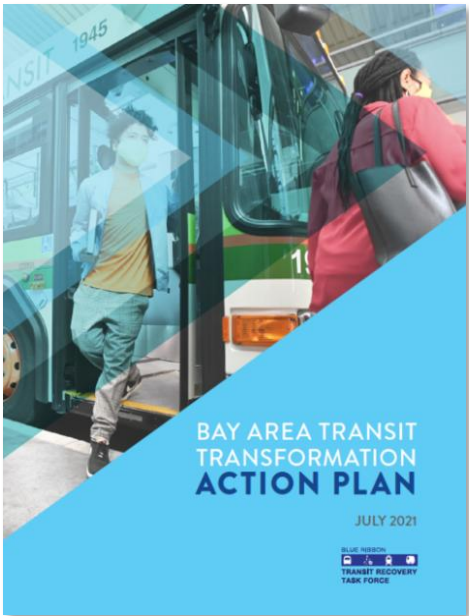
A photograph of a busy transit station. In the center, a wide set of concrete stairs leads up, flanked by metal railings. To the right of the stairs is a modern escalator with a glass side panel. Numerous people of various ages and ethnicities are using the stairs and escalator, moving upwards. The station has a high ceiling with concrete beams and large windows on the sides, letting in natural light. A semi-transparent blue banner with white text is overlaid across the middle of the image.

# Transforming the Rider Experience

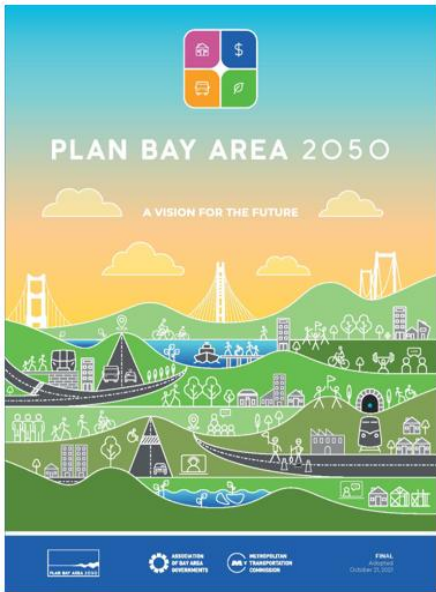
Photo: Karl Nielsen

For Your Sa  
No running or pushing  
No carrying large suitcases or bags

# Plan Bay Area: Informed by Regional Studies

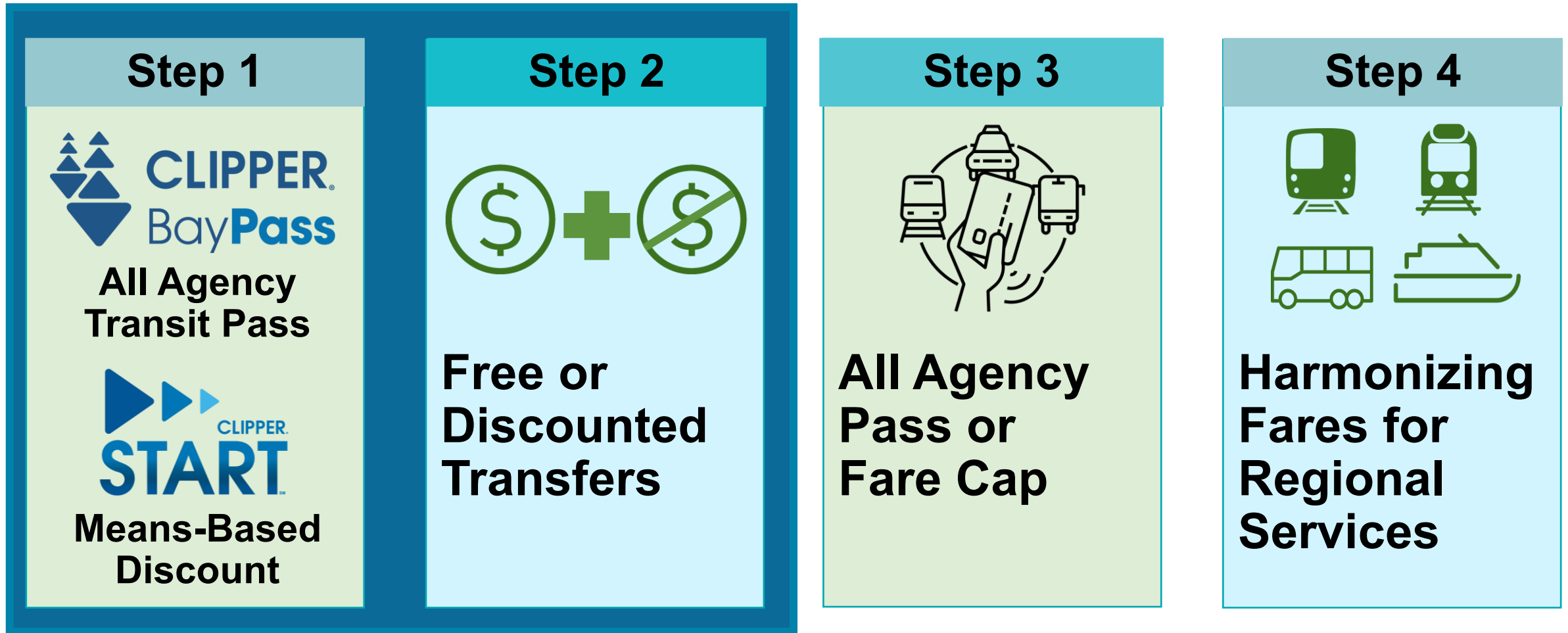


Actions 1-3



Strategy T4

# Turning Studies into Outcomes for the Customer



**Current focus areas**



# Increasing Ridership: Clipper BayPass Pilot



# Clipper BayPass

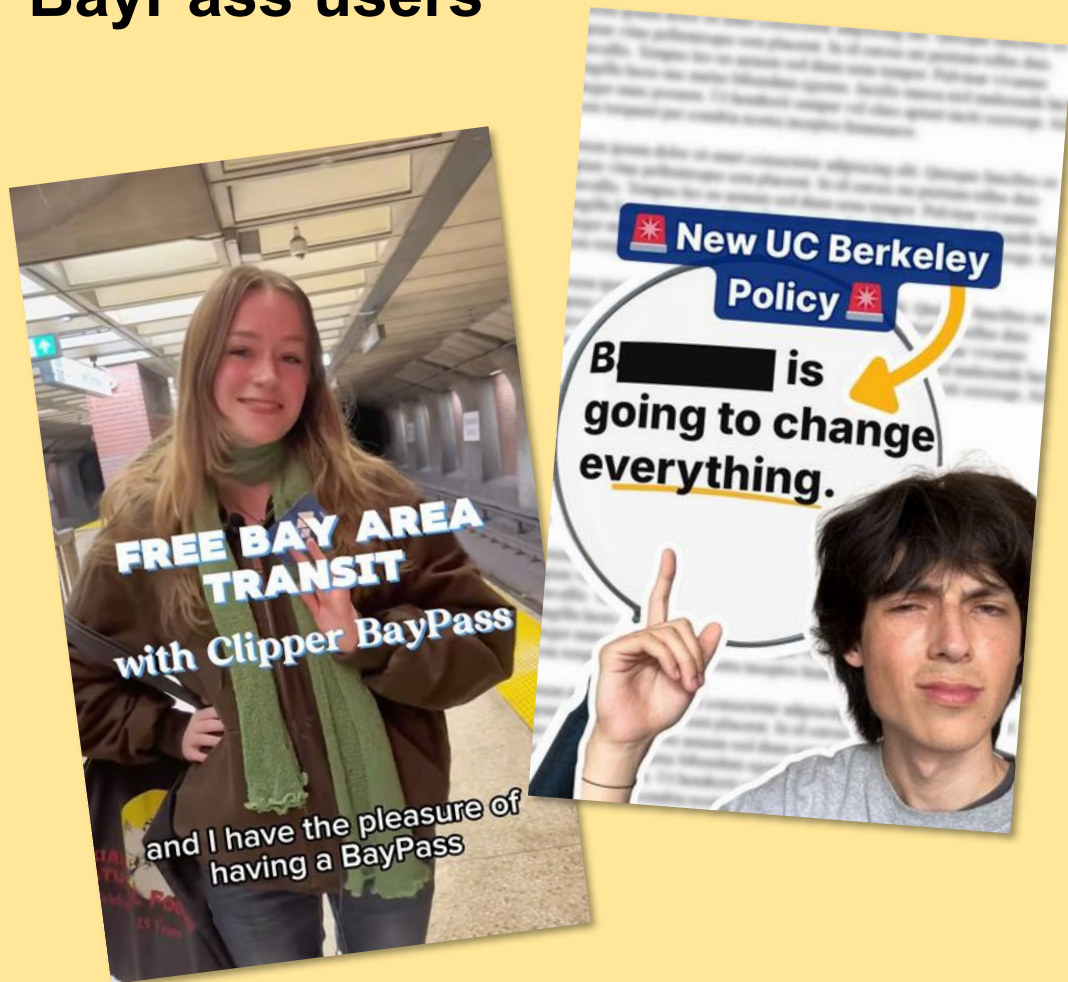
The Bay Area's first unlimited regional transit pass for rides on all bus, rail and ferry services in the Bay Area — anytime, anywhere.

- ▶ Increasing transit ridership
- ▶ Generating new transit revenues
- ▶ Improving customer experience and attitudes towards transit



# Riders & Institutions Love Clipper BayPass

## Social media posts by BayPass users



## Existing Clipper BayPass employer and institutional customers



# Designing a Program Based on Customers + Data



## Phase 1 **COMPLETE**

Pilot with over 50,000 university students and affordable housing residents

Randomized controlled trial funded by transit operators and MTC

2022-2025



## Phase 2 **ONGOING**

Pilot with over 80,000 Employees, Transportation Management Association Members and Property Residents (and growing)

Funded by Payments from Participating Employers/Institutions

2024-2027



# BayPass Phase 1 Pilot Key Findings

On average, **SFSU, SJSU** and **UC Berkeley** students with access to **Clipper BayPass**:

Took  
**30%**  
More transit  
trips



**~2X** more  
transit trips for  
low-income students\*

Made **163% more**  
**inter-transit-agency**  
**transfers**

Students were  
**6%-15% less likely to**  
**leave their university**  
between Fall 2022-Fall 2023

*\*Compared to middle and high-income students*

# BayPass Phase 2 Early Findings

**Launched January 2024**

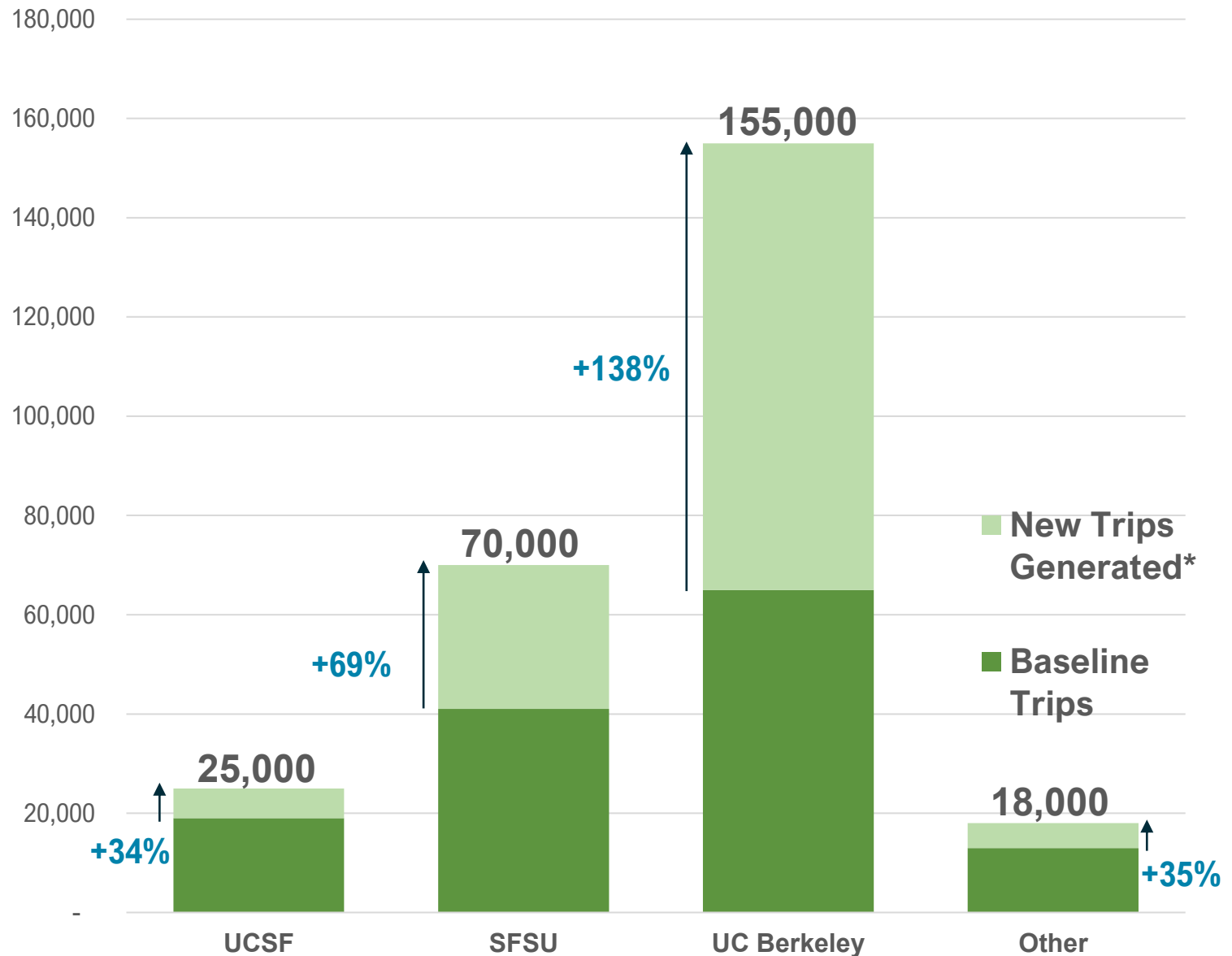
Preliminary findings indicate  
users took **35% more transit  
trips** in 2024 than in 2023



# Clipper BayPass Grows Ridership and Revenue

- ▶ In September 2025, riders took a total of 274,000 trips using BayPass on BART
- ▶ Of these, almost 50% were new trips generated by BayPass
- ▶ Estimated new trips generated by BayPass drove approximately \$650,000 of additional BART fare revenue in September alone

**BART Trips Taken by BayPass Holders**  
in September 2025



\*New Trips Generated estimates are based on results of BayPass Phase 1 evaluation and Phase 2 preliminary evaluation



1708

SAN RAFAEL

A white Marin Transit bus with yellow and black diagonal stripes is shown. The destination sign above the windshield reads "SAN RAFAEL". The bus number "1708" is visible on the top right. Several passengers are boarding the bus, and others are walking past it. A young man with a backpack and a young girl are walking in the foreground. Two men in maroon shirts are walking past the bus. Two women are boarding the bus. The background shows a clear blue sky and some distant hills.

# Making Transit More Affordable: Clipper START & Free/Discounted Transfer Pilot

# Clipper START Basics

**Clipper START provides single-ride 50% fare discounts** to eligible riders on all transit operators that use Clipper

- ▶ To qualify, you must:
  - ▶ **Be a resident of the San Francisco Bay Area**
  - ▶ **Be 19-64 years old**
  - ▶ **Not have an RTC Clipper Card** for people with disabilities
  - ▶ Have a household income of 200% of the federal poverty level or less



# Clipper START Key Findings



**8.5 Million**

**Trips Taken**

**(+94% in 2024)**

~53,000 weekly trips taken  
on average  
in 2024



**61,000**

**Program Enrollees**

**(+82% in 2024)**

~1,500 participants  
joining per month



**2.1 Million**

**Transfers Made**

~14,000 transfers  
made per week on  
average in 2024  
**(+103% in 2024)**

Data from July 2020 through August 2025

► **1,500 new participants** join each month

► Partnering with county and state social service programs to expand reach (underway)

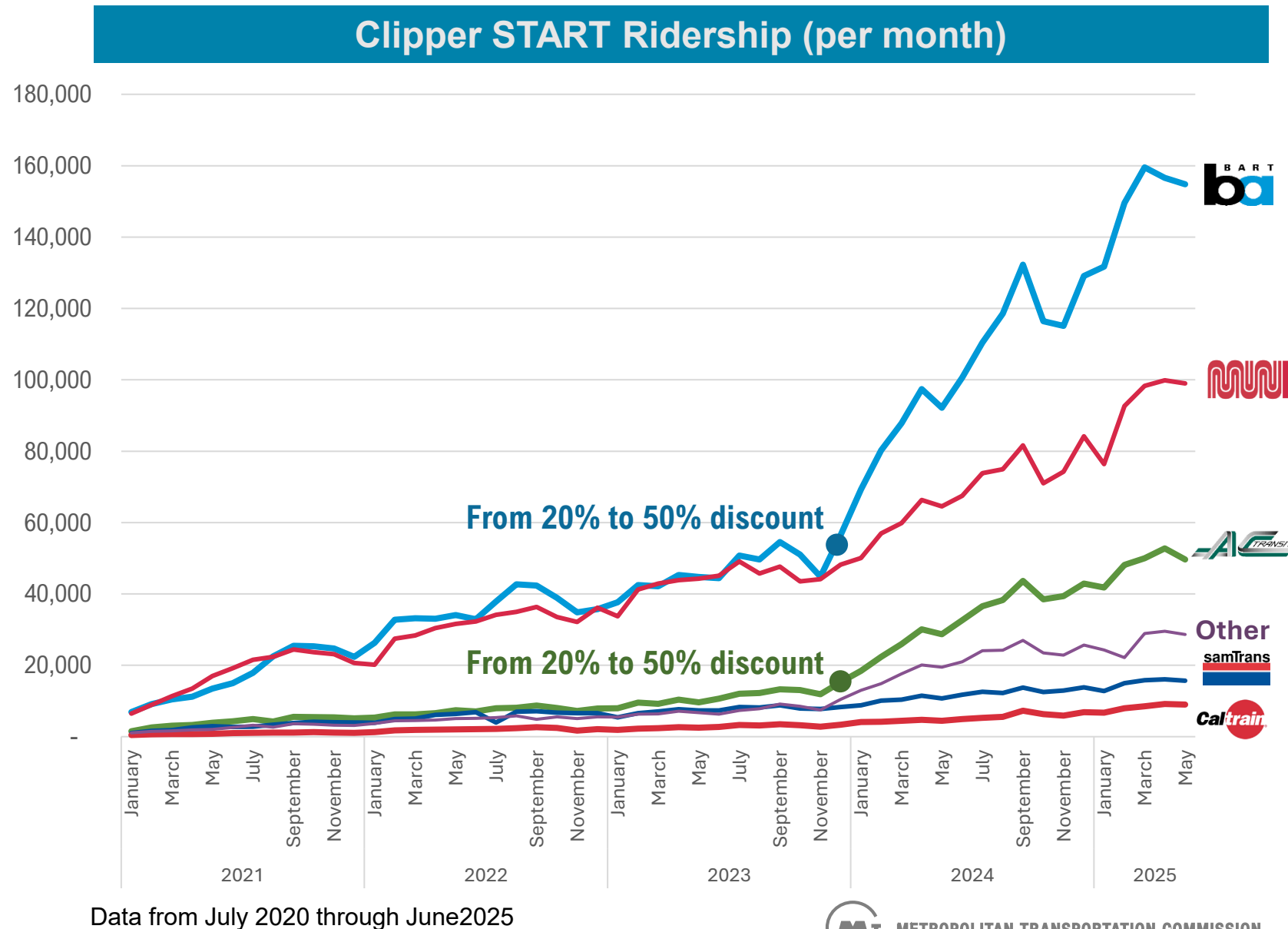


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Clipper START ridership has grown for all operators, with BART and AC Transit experiencing a sharp uptick in ridership in 2024 after these agencies increased the discount to 50%.

- ▶ **42%** of trips to date are on BART
- ▶ **31%** of trips to date are on SF Muni
- ▶ **12%** of trips to date are on AC Transit

# Access and Mobility



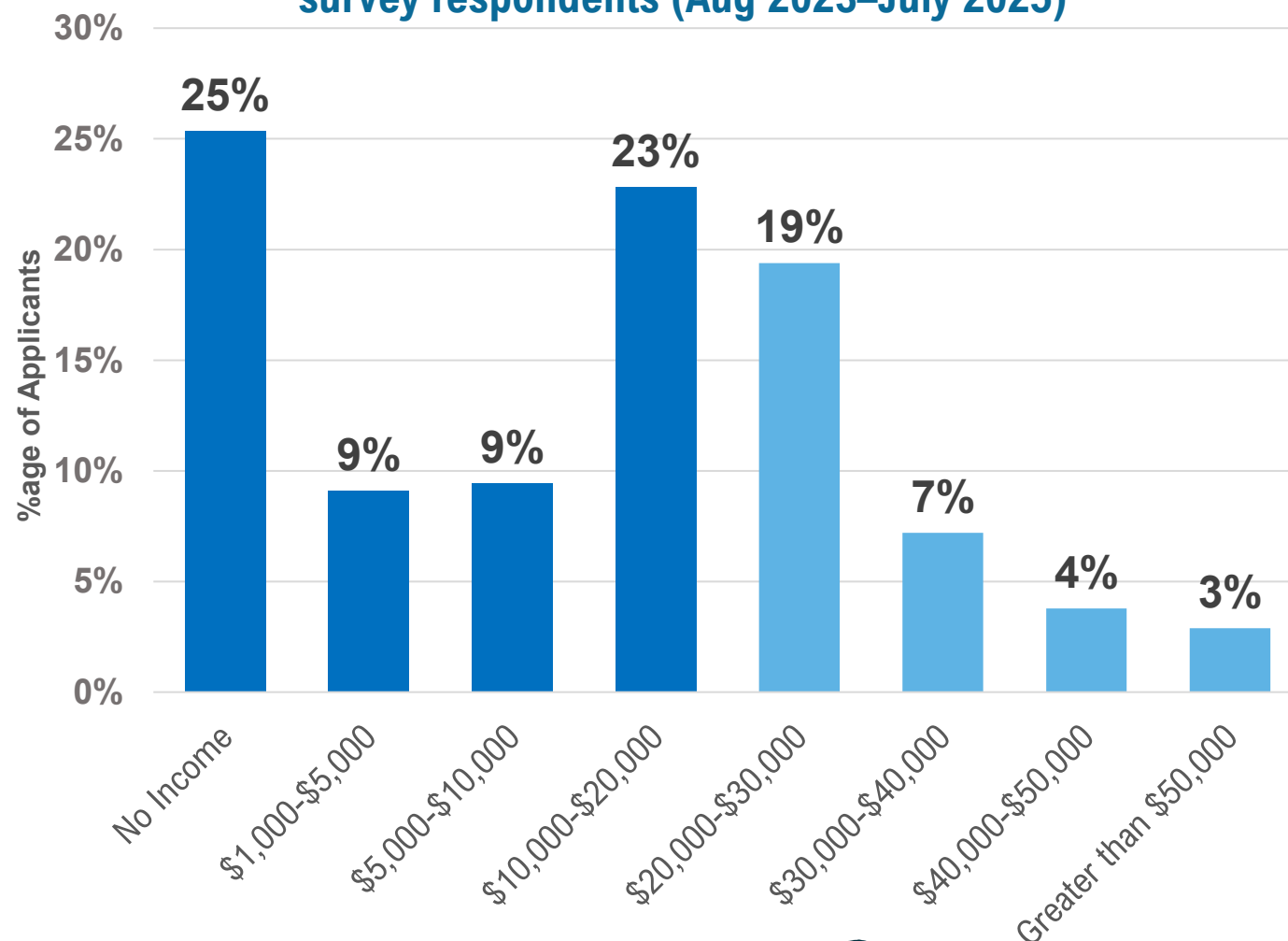
# Clipper START Benefiting Frequent Transit Riders

Surveys from Clipper  
START applicants show:

- ▶ **2/3 of respondents** have a household income below \$20,000, and
- ▶ **54% of respondents** take transit over 5 times a week.

## Clipper START Applicants by Household Income

Household income data collected from Clipper START applicant survey respondents (Aug 2023–July 2025)



# Making Transit More Affordable: Free/Discounted Transfer Pilot

- ▶ Launching with Next Generation Clipper
- ▶ Expected to increase Bay Area transit ridership by up to 30,000 trips per day

Saving  
riders up to  
**\$2.85**  
per transfer



# Funding Fare Transformation Projects



## Clipper Bay Pass

- ▶ **\$6 million** in Transit Transformation funds
- ▶ **Self-funded** and revenue positive
- ▶ **Pilot program** through June 2027



## Clipper Start

- ▶ **Up to \$8 million** of regional State Transit Assistance
- ▶ **50%** contributed by Operators
- ▶ Annual cost of \$1 million+



## Free/Discounted Transfer Pilot

- ▶ **Operators cover** first \$0.50 of discount
- ▶ **\$22 million** in REAP 2 funds
- ▶ Runs for 18-24 months

# SB 63 Expenditure Plan – Providing Ongoing Funding for More Affordable Fares

## Free/Discounted Transfer Pilot

**SB 63 Expenditure  
Plan Investment**

**\$17 million/year**

**Provides stable  
funding to offer free  
transfers for measure's  
14-year duration.**

**Rider Benefits**

**30,000**

new transit rides/day

**\$1,500**

Potential savings/year  
per rider.\*

## Sustain and Grow Clipper START

**SB 63 Expenditure  
Plan Investment**

**\$8 million/year** funds  
regional contribution to  
double Clipper START  
capacity from 100,000 to  
an estimated 200,000.

**Rider Benefits**

Increase affordability for

**100,000**

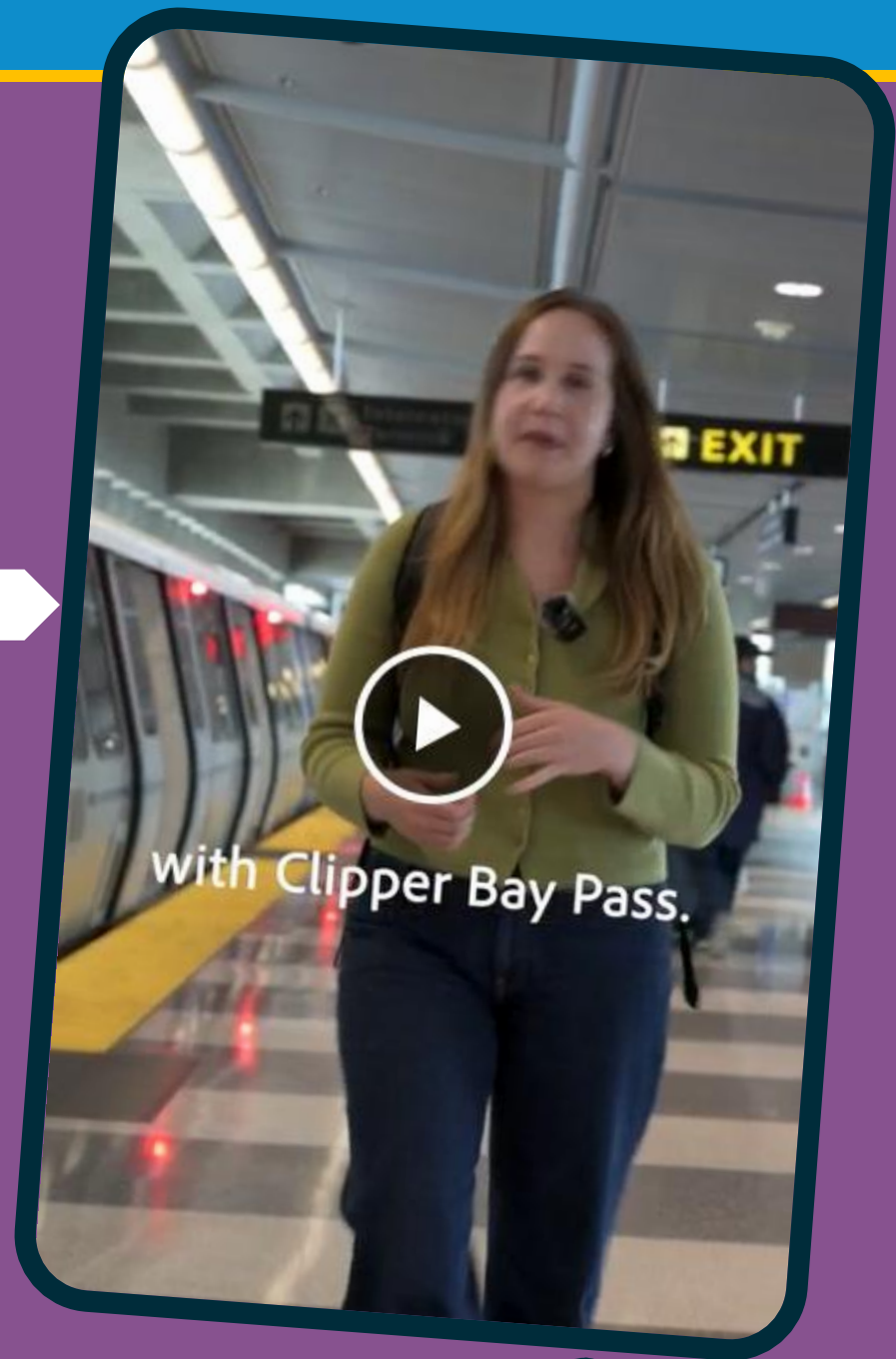
additional transit riders

**64%** users report  
taking more transit

\*An average rider who transfers between bus and rail or ferry on both ends of a trip would save \$5.70 per day.

# Clipper BayPass Testimonial

[Video Link](#)



METROPOLITAN TRANSPORTATION COMMISSION



Photo: Karl Nielsen

# Thank You

## Regional Network Management

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Planner

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