

**Metropolitan Transportation Commission  
Policy Advisory Council**

**July 10, 2019**

**Agenda Item 7**








**Transit Fare Integration Update**

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- Subject:** Update on recent MTC staff work on transit fare integration in the Bay Area. This update is provided based on a request by Policy Advisory Council members.
- Background:** On February 8, 2019, MTC hosted a Fare Integration Seminar for transit agency board members and staff at the San Francisco Ferry Building. The goal of the seminar was to create a forum for board members and staff to learn about fare integration models from other regions, to consider possible benefits and obstacles to more fare integration in the Bay Area, and to provide direction to staff on possible next steps.
- At the seminar, a general consensus emerged to move forward in exploring the value of integrating the region's complicated transit fare structure in order to make it more rational, affordable, and attractive to existing and potential passengers. Attendees also supported taking action now as a way to possibly reduce the complexity of the Next Generation Clipper system. Taking a cue from work done in Toronto, as discussed by the guest speaker at the seminar, Martin Powell (who led Toronto's regional fare integration program), attendees at the seminar expressed support for utilizing a "business case" model to analyze how an integrated or more harmonized transit fare system could work.
- At its June 17, 2019 meeting, the Clipper Executive Board, considered a request to support the use of \$599,839 in residual funds available from the Integrated Fare Structure Program, capital project number 34, under Regional Measure 2 to support developing a business case for transit fare integration. As the successor body to the TransLink Consortium – the project sponsor identified in RM2 legislation – the Clipper Executive Board was asked to authorize MTC staff to request that the MTC Commission allocate these funds for the business case work. At the June meeting the Clipper Executive Board voted to defer this action on the request to support the use of RM2 funds to a future meeting, no later than October 2019. In the interim MTC staff and transit operator staff are working to develop a scope of work for the business case.
- Recommendation:** Information
- Attachments:** Attachment A - Comparison of Single Trip Fare and Discount Levels of Bay Area Transit Operators (as of February 8, 2019)  
Attachment B - PowerPoint presented to transit agency board members and staff on February 8, 2019.

Comparison of Single Trip Fare and Discount Levels of Bay Area Transit Operators

February 8, 2019

Transit Operators	Fare Type	Single Trip Fares and Discount Levels															
		Adult	Child			Youth			Senior			RTC			Means-Based Discount (Proposed)		
		Clipper Fare	Child Fare	Discount from Adult Clipper Fare	Eligibility	Youth Clipper Fare	Discount from Adult Clipper Fare	Eligibility	Senior Clipper Fare	Discount from Adult Clipper Fare	Eligibility	RTC Clipper Fare	Discount from Adult Clipper Fare	Eligibility	Transit Operator Fare	Discount Level	Eligibility
	Local	\$2.25	\$0.00	100%	0-4 years	\$1.10	51%	5-18 years	\$1.10	51%	65 years+	\$1.10	51%	Medical Verification			
	Transbay	\$5.50	\$0.00	100%	0-4 years	\$2.75	50%	5-18 years	\$2.75	50%	65 years+	\$2.75	50%	Medical Verification			
	Min Trip	\$2.00	\$0.00	100%	0-4 years	\$1.00	50%	5-18 years	\$0.70	65%	65 years+	\$0.70	65%	Medical Verification	\$1.60	20%	Income Verification
	Max Trip	\$16.15	\$0.00	100%	0-4 years	\$8.10	50%	5-18 years	\$5.85	64%	65 years+	\$5.85	64%	Medical Verification	\$12.90	20%	Income Verification
	Min Zone	\$3.20	\$0.00	100%	0-4 years	\$1.60	50%	5-18 years	\$1.60	50%	65 years+	\$1.60	50%	Medical Verification	\$2.55	20%	Income Verification
	Max Zone	\$14.45	\$0.00	100%	0-4 years	\$6.60	54%	5-18 years	\$6.60	54%	65 years+	\$6.60	54%	Medical Verification	\$11.55	20%	Income Verification
	Local	\$2.05	\$0.00	100%	0-4 years	\$1.00	51%	5-18 years	\$1.00	51%	65 years+	\$1.00	51%	Medical Verification			
	Local/SF	\$3.60	\$0.00	100%	0-4 years	\$1.00	72%	5-18 years	\$1.00	72%	65 years+	\$1.00	72%	Medical Verification			
	GGT Min Zone	\$1.80	\$0.00	100%	0-4 years	\$1.00	44%	5-18 years	\$1.00	44%	65 years+	\$1.00	44%	Medical Verification	\$1.44	20%	Income Verification
	GGT Max Zone	\$10.40	\$0.00	100%	0-4 years	\$6.50	38%	5-18 years	\$6.50	38%	65 years+	\$6.50	38%	Medical Verification	\$8.32	20%	Income Verification
	GGF Sausalito	\$6.75	\$0.00	100%	0-4 years	\$6.25	7%	5-18 years	\$6.25	7%	65 years+	\$6.25	7%	Medical Verification	\$5.40	20%	Income Verification
	GGF Larkspur	\$7.75	\$0.00	100%	0-4 years	\$6.00	23%	5-18 years	\$6.00	23%	65 years+	\$6.00	23%	Medical Verification	\$6.20	20%	Income Verification
	GGF Tiburon	\$7.00	\$0.00	100%	0-4 years	\$6.25	11%	5-18 years	\$6.25	11%	65 years+	\$6.25	11%	Medical Verification	\$5.60	20%	Income Verification
	Local	\$2.50	\$0.00	100%	0-4 years	\$1.25	50%	5-18 years	\$1.25	50%	65 years+	\$1.25	50%	Medical Verification	\$1.25	50%	Income Verification
	Cable Car	\$7.00	\$7.00	0%	--	\$7.00	0%	--	\$7.00	0%	--	\$7.00	0%	--	\$7.00	0%	
	Local	\$2.15	\$0.00	100%	0-4 years	\$1.00	53%	5-18 years	\$1.00	53%	65 years+	\$1.00	53%	Medical Verification			
	Express	\$4.50	\$0.00	100%	0-4 years	\$1.00	78%	5-18 years	\$1.00	78%	65 years+	\$1.00	78%	Medical Verification			
County Connection	Local	\$2.00	\$0.00	100%	0-5 years	\$2.00	0%	6-18 years	\$1.00	50%	65 years+	\$1.00	50%	Medical Verification			
	Express	\$2.25	\$0.00	100%	0-5 years	\$2.25	0%	6-18 years	\$1.00	56%	65 years+	\$1.00	56%	Medical Verification			
Dumbarton Express	Local	\$2.15	\$0.00	100%	0-4 years	\$1.05	51%	5-18 years	\$1.05	51%	65 years+	\$1.05	51%	Medical Verification			
	Transbay	\$5.50	\$0.00	100%	0-4 years	\$2.75	50%	5-18 years	\$2.75	50%	65 years+	\$2.75	50%	Medical Verification			
Fairfield and Suisun Transit (FAST)	Local Blue, 85	\$1.75	\$0.00	100%	0-5 years	\$1.50	14%	6-18 years	\$0.85	51%	65 years+	\$0.85	51%	Medical Verification			
	Blue, 85	\$2.75	\$0.00	100%	0-5 years	\$2.00	27%	6-18 years	\$1.35	51%	65 years+	\$1.35	51%	Medical Verification			
	Blue, Yellow, 80	\$5.00	\$0.00	100%	0-5 years	\$4.00	20%	6-18 years	\$2.50	50%	65 years+	\$2.50	50%	Medical Verification			
	Green Express	\$5.75	\$0.00	100%	0-5 years	\$4.75	17%	6-18 years	\$2.85	50%	65 years+	\$2.85	50%	Medical Verification			
Marin Transit	Local	\$1.80	\$0.00	100%	0-4 years	\$1.00	44%	5-18 years	\$1.00	44%	65 years+	\$1.00	44%	Medical Verification			
Petaluma Transit	Local	\$1.50	\$0.00	100%	0-5 years	\$1.00	33%	6-18 years	\$0.75	50%	65 years+	\$0.75	50%	Medical Verification			
Santa Rosa CityBus	Local	\$1.50	\$0.00	100%	0-4 years	\$1.25	17%	5-18 years	\$0.75	50%	65 years+	\$0.75	50%	Medical Verification			
SolTrans (Benicia & Vallejo)	Local	\$1.75	\$0.00	100%	0-5 years	\$1.50	14%	6-18 years	\$0.85	51%	65 years+	\$0.85	51%	Medical Verification			
	Solano County Express	\$2.75	\$0.00	100%	0-5 years	\$2.00	27%	6-18 years	\$1.35	51%	65 years+	\$1.35	51%	Medical Verification			
	Outside County Express	\$5.00	\$0.00	100%	0-5 years	\$4.00	20%	6-18 years	\$2.50	50%	65 years+	\$2.50	50%	Medical Verification			
	Route 82	\$10.00	\$0.00	100%	0-5 years	\$8.00	20%	6-18 years	\$5.00	50%	65 years+	\$5.00	50%	Medical Verification			
Sonoma County Transit	Bus	\$1.50 to \$4.80				\$1.25 to \$4.55	17% to 5%	0-18 years	\$0.75 to \$2.40	50% to 50%	65 years+	\$0.75 to \$2.40	50% to 50%	Medical Verification			
		\$3.50 to \$11.50	\$0.00 to \$0.00	100% to 100%	0-4 years to 0-4 years	\$1.75 to \$5.75	50% to 50%	5-18 years to 5-18 years	\$1.75 to \$5.75	50% to 50%	65 years+	\$1.75 to \$5.75	50% to 50%	Medical Verification			
SMART (Sonoma Marin Rail)	Rail																
Tri Delta Transit	Local	\$2.00	\$0.00	100%	0-5 years	\$2.00	0%	6-18 years	\$0.85	58%	65 years+	\$0.85	58%	Medical Verification			
	Express	\$2.50	\$0.00	100%	0-5 years	\$2.50	0%	6-18 years	\$1.25	50%		\$1.25	50%	Medical Verification			
Union City Transit	Local	\$2.00	\$0.00	100%	0-5 years	\$1.25	38%	6-18 years	\$1.00	50%	65 years+	\$1.00	50%	Medical Verification			
VINE (Napa County)	Local	\$1.60	\$0.00	100%	0-5 years	\$1.10	31%	6-18 years	\$0.80	50%	65 years+	\$0.80	50%	Medical Verification			
	Route 29 Express 1	\$3.25	\$0.00	100%	0-5 years	\$3.25	0%	6-18 years	\$3.25	0%	65 years+	\$3.25	0%	Medical Verification			
	Route 29 Express 2	\$5.50	\$0.00	100%	0-5 years	\$5.50	0%	6-18 years	\$5.50	0%	65 years+	\$5.50	0%	Medical Verification			
	Napa-Solano Express	\$3.00	\$0.00	100%	0-5 years	\$3.00	0%	6-18 years	\$3.00	0%	65 years+	\$3.00	0%	Medical Verification			
Vacaville City Coach	Local	\$1.50	\$0.00	100%	0-5 years	\$1.25	17%	6-18 years	\$0.75	50%	65 years+	\$0.75	50%	Medical Verification			
WETA (San Francisco Bay Ferry)	Ferry	\$1.80 to \$11.00	\$0.00 to \$0.00	100% to 100%	0-4 years to 0-4 years	\$0.70 to \$7.10	61% to 35%	5-18 years to 5-18 years	\$0.70 to \$7.10	61% to 35%	65 years+	\$0.70 to \$7.10	61% to 35%	Medical Verification			
WHEELS	Local	\$2.00	\$0.00	100%	0-5 years	\$2.00	0%	6-18 years	\$1.00	50%	65 years+	\$1.00	50%	Medical Verification			
WestCAT	Local	\$1.75	\$0.00	100%	0-5 years	\$1.75	0%	6-18 years	\$0.75	57%	65 years+	\$0.75	57%	Medical Verification			
	Express	\$5.00	\$0.00	100%	0-5 years	\$5.00	0%	6-18 years	\$2.00	60%	65 years+	\$2.00	60%	Medical Verification			



# Transit Fare Policy Integration Seminar

**Friday, February 8, 2019  
1:00 – 3:30 p.m.**

**Port Commission Hearing Room  
San Francisco Ferry Building**





# Agenda

**Introductions**

**Why Look at Fares?**

**Bay Area Background**

**Guest Speaker: Martin Powell**

***Coffee Break***

**Co-creation Workshop**

**Next Steps**

**Public Comment**





An aerial photograph of a vast vineyard in a valley, with rolling hills in the background. The vineyard is divided into numerous rectangular plots, some of which are planted with vines, while others appear to be fallow or planted with different crops. A road runs through the middle of the vineyard, and there are some buildings and trees scattered throughout the landscape. The lighting suggests it might be late afternoon or early morning, with long shadows cast across the fields.

**Our goal today is  
to think big . . .**



**. . . about a vision for the future where  
our fare policies are designed to put the  
customer first, promote mobility, and  
remove barriers to using transit.**







**Metro**

11:39 AM INBOUND  
J 3, 4 L 8, 13 M 7, 21  
N 5, 12

9:27 AM DU  
J 14, 15 L 2  
N 3, 14

**The Price is Right for Bay Area Transit**  
**Can you match the transit trip and the fare?**





# Fares Today

**9 different local bus fares on Clipper® from \$1.50 to \$2.50**

**Trips of the same distance and mode can vary dramatically in price**

**16 different discount rates for youth, 14 different rates for seniors**

**19,463 fare policy business rules are needed in Clipper® to implement our current system**

**Proposed Means-Based Discount of 20% on SFMTA, BART, Caltrain, Golden Gate**



# **Next Generation Clipper®**

**\$461 million contract awarded in Sept. 2018**


**More flexible, “account-based” system**

**Final go-ahead for system design in late 2021**

**We have an opportunity to save money and reduce complexity of Next Gen Clipper®**

**A coherent regional fare policy is one of five key findings from the 2017 Future of Clipper® Survey of 8,700+ users**





**70,000 trips on Clipper® Cards each day involve a direct transfer between two operators, despite the disincentives in the current system**

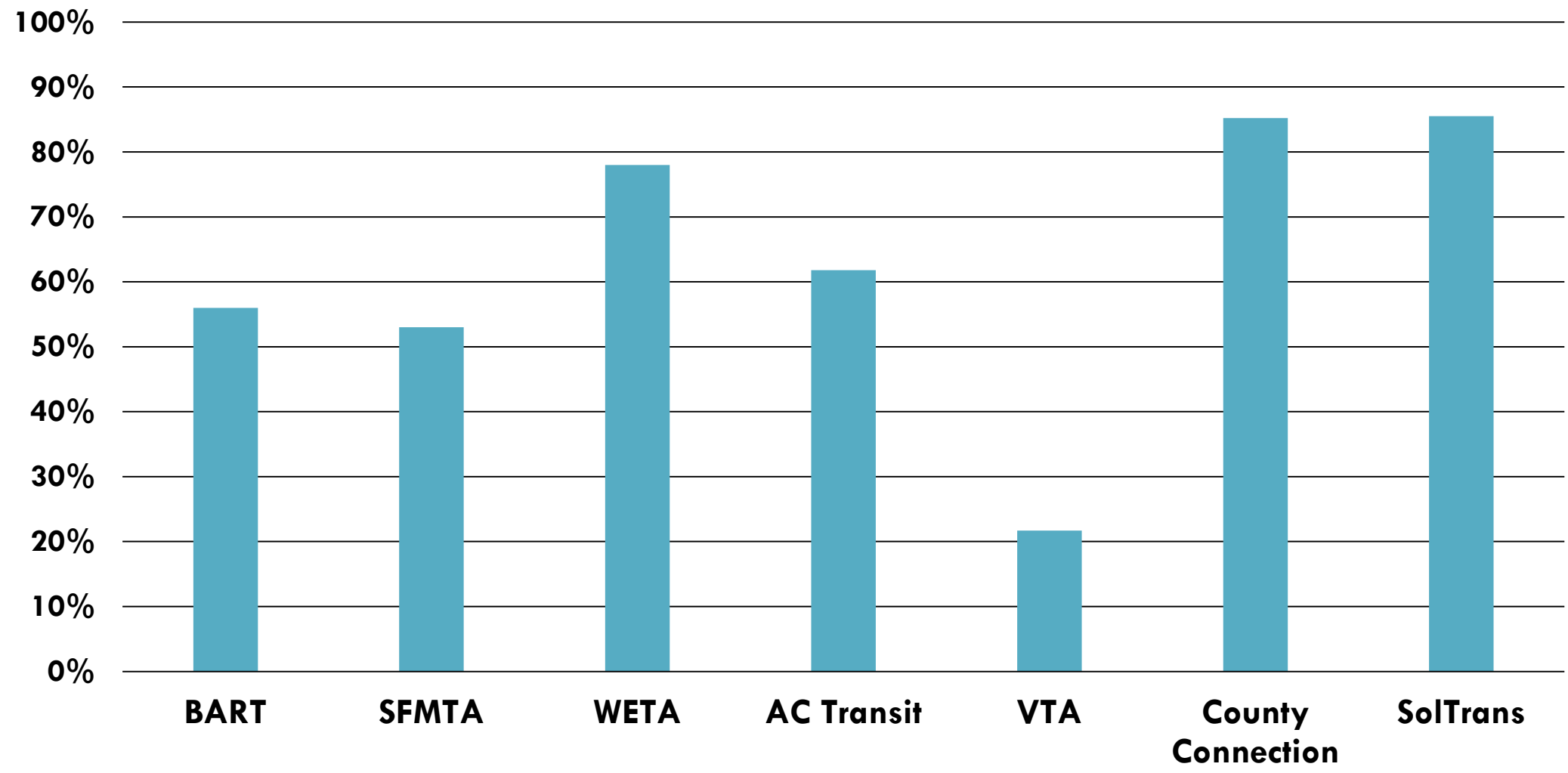




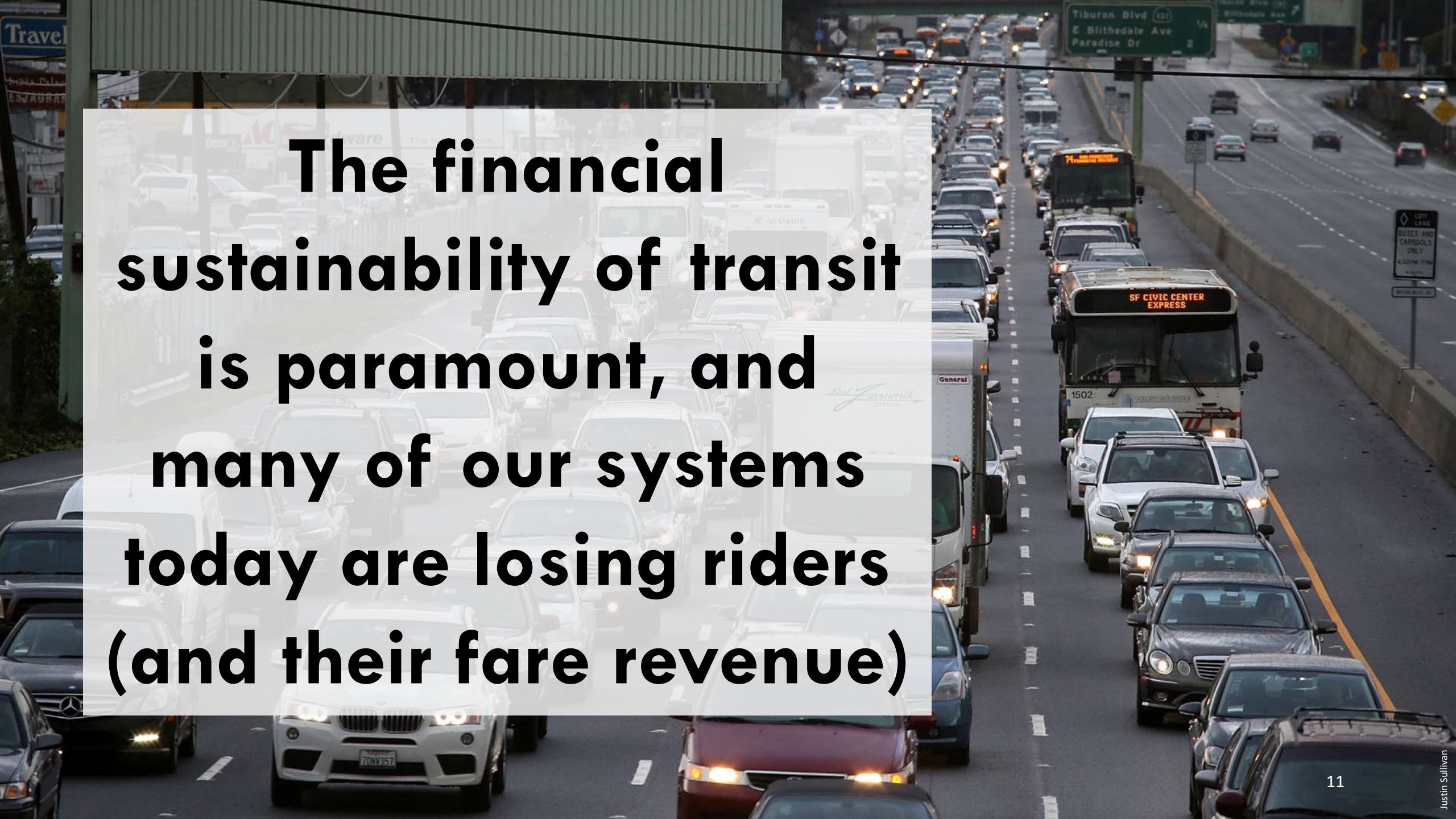
**More than half of Bay Area transit riders use their Clipper® Cards on more than one operator each month**



# % of Clipper® Cards Used on Listed Operator, Which Were Also Used on At Least One Other Operator



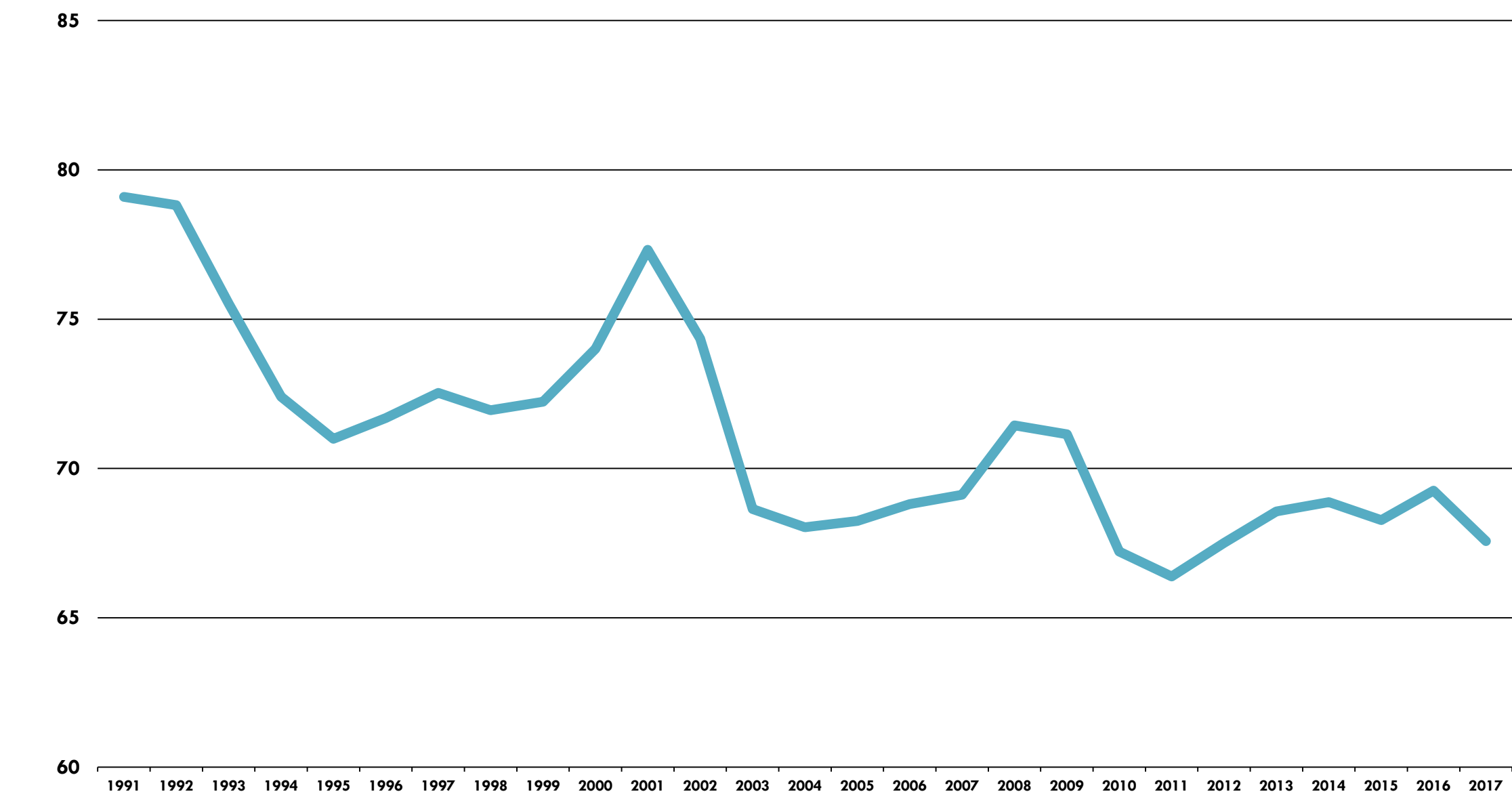




**The financial sustainability of transit is paramount, and many of our systems today are losing riders (and their fare revenue)**



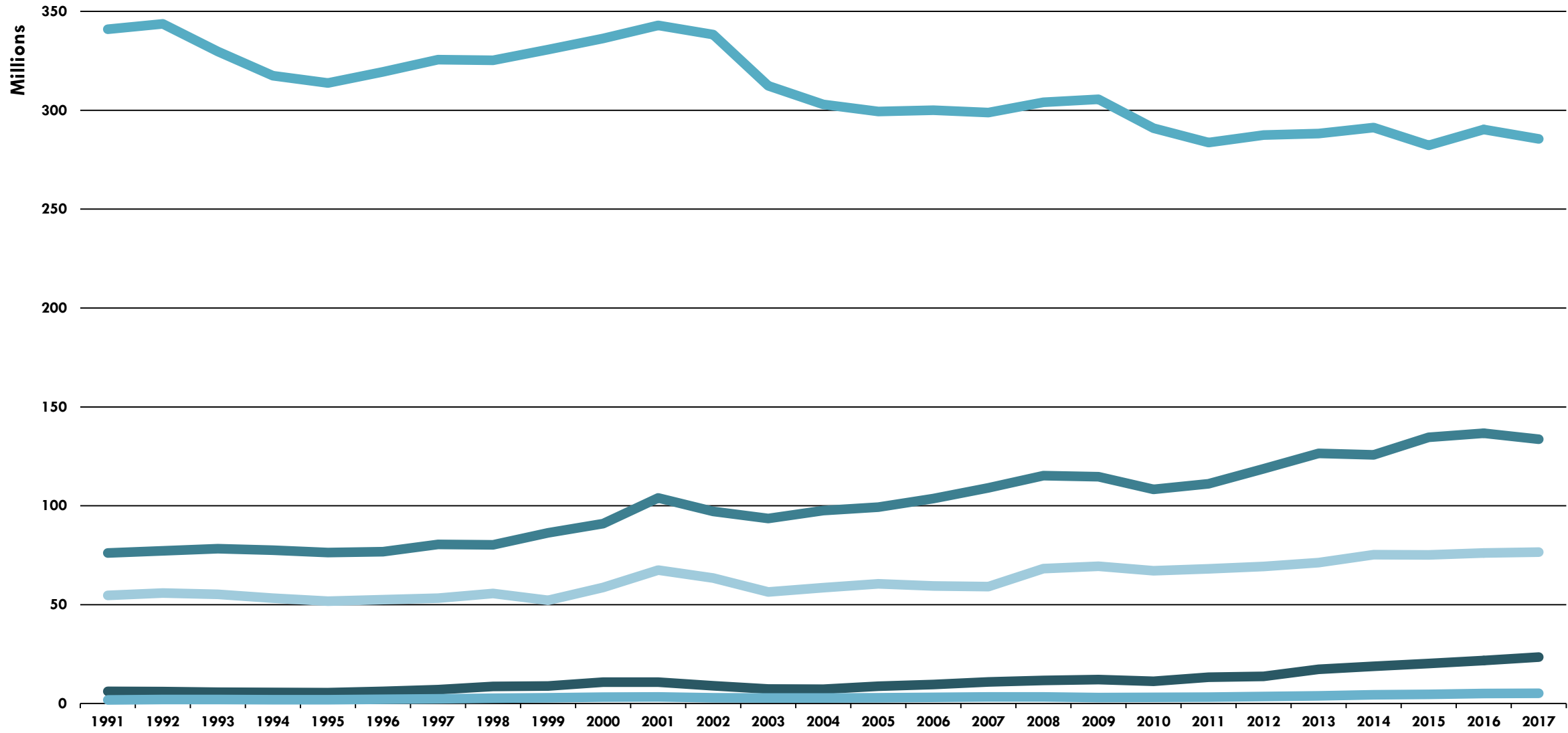
# Total Annual Transit Ridership per Capita (all modes)



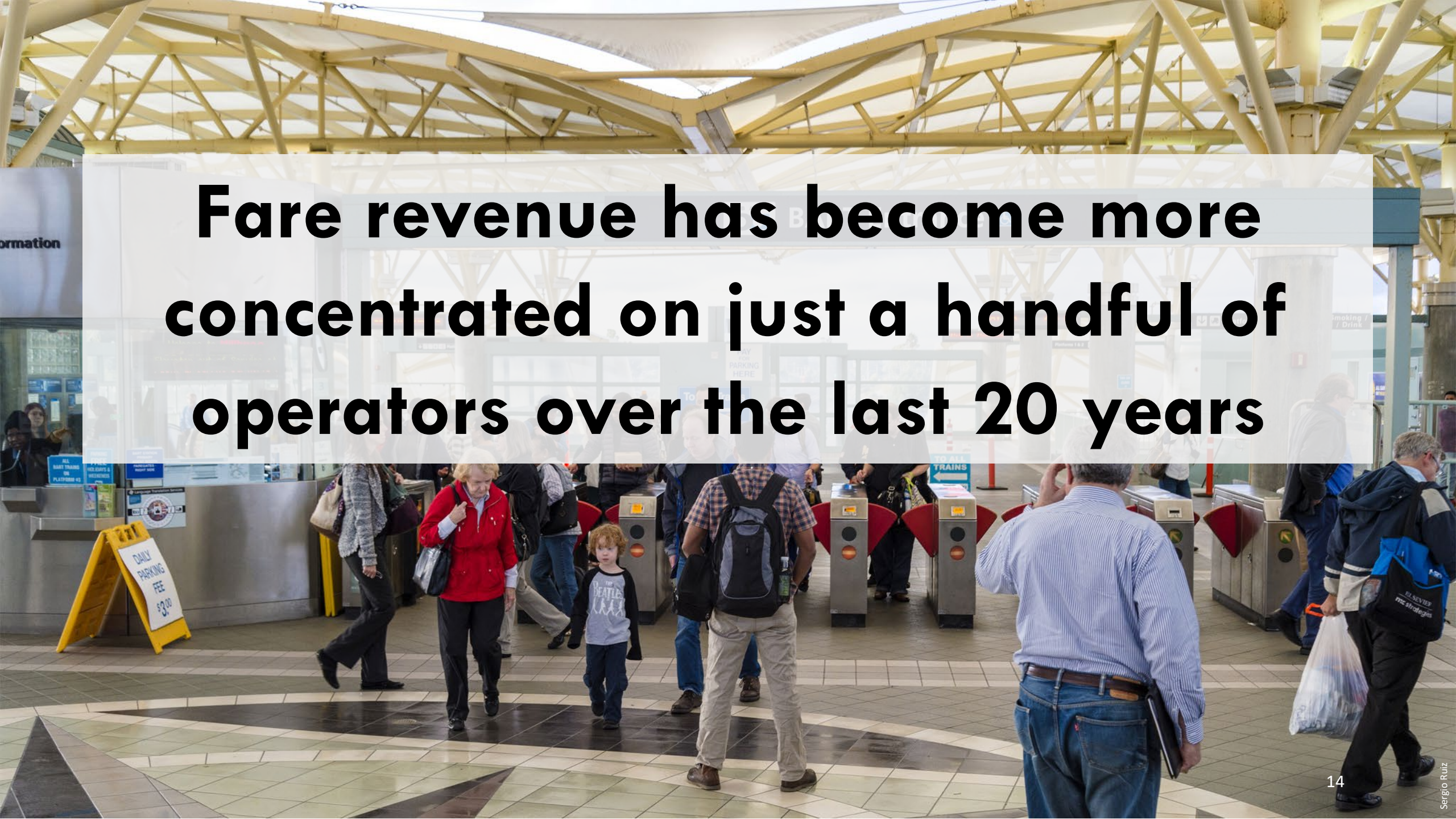
Source: NTD



# Total Annual Transit Ridership by Mode



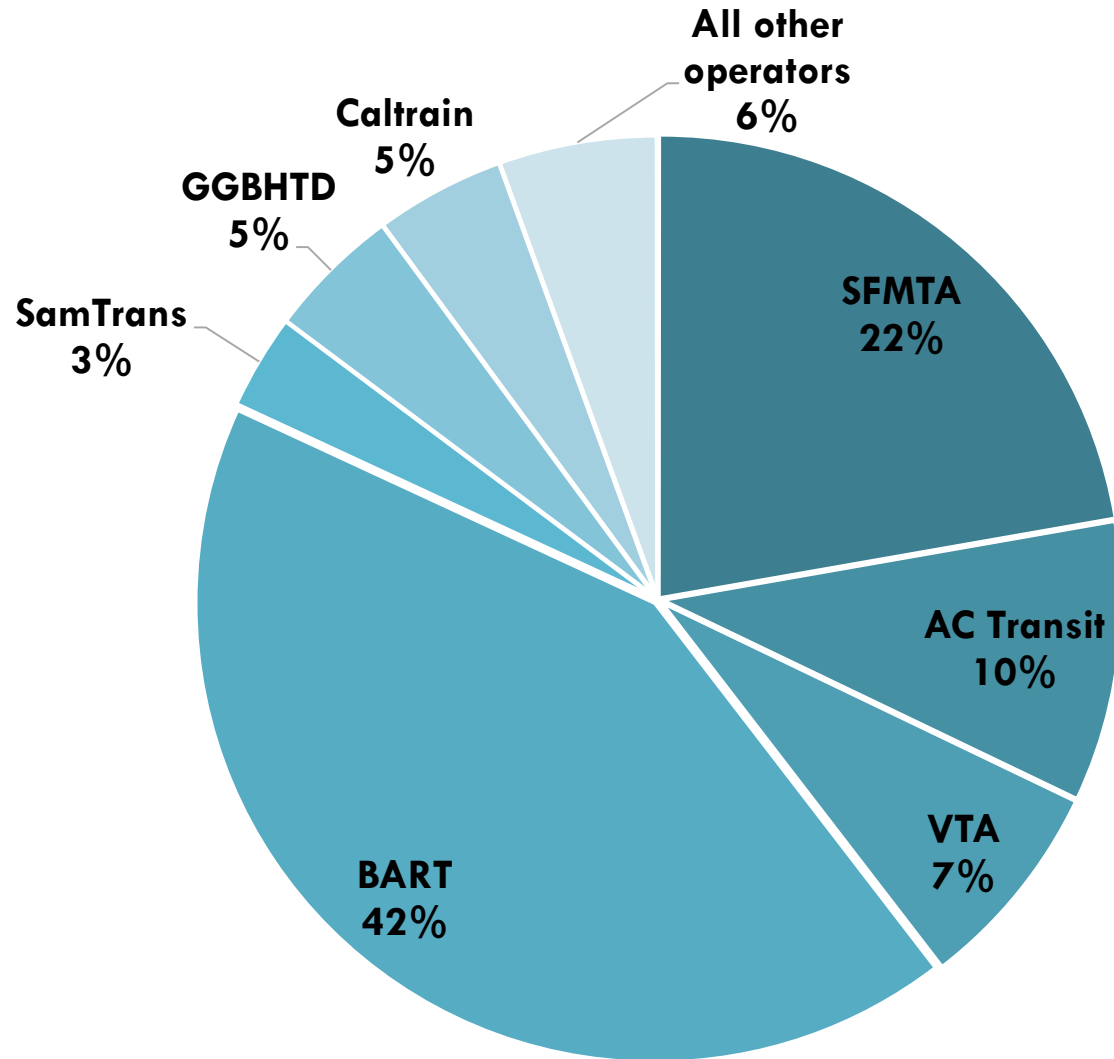


A photograph of a busy transit station. In the foreground, several people are walking towards the camera. A woman in a red jacket and a young child in a grey shirt are prominent. In the background, people are passing through turnstiles. The station has a high ceiling with a yellow metal truss structure. A sign on the left says "DAILY PARKING FEE \$3.00". A sign on the right says "TO ALL TRAINS".

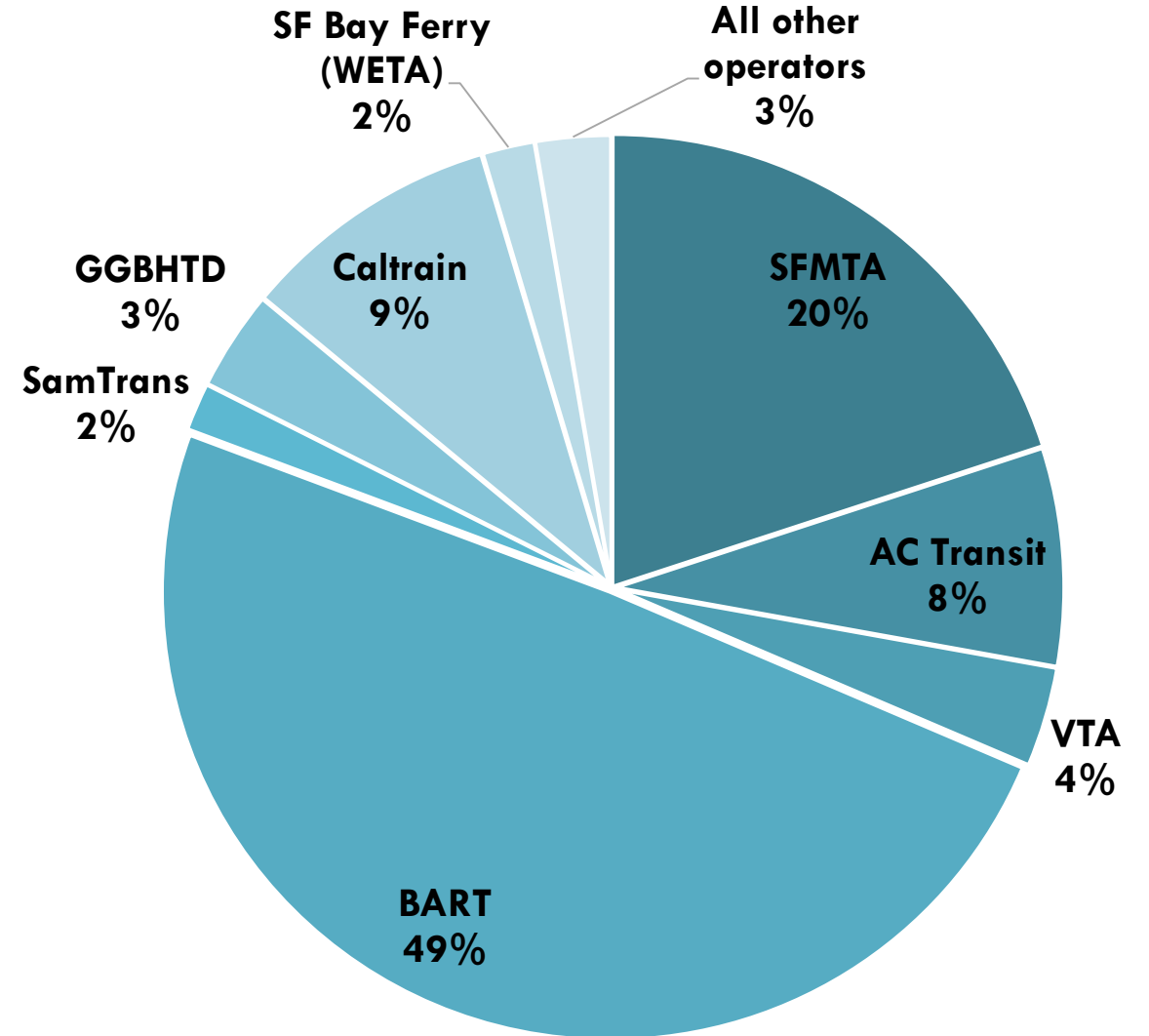
**Fare revenue has become more concentrated on just a handful of operators over the last 20 years**



**Total Bay Area Fare Revenue, FY 1999-00**

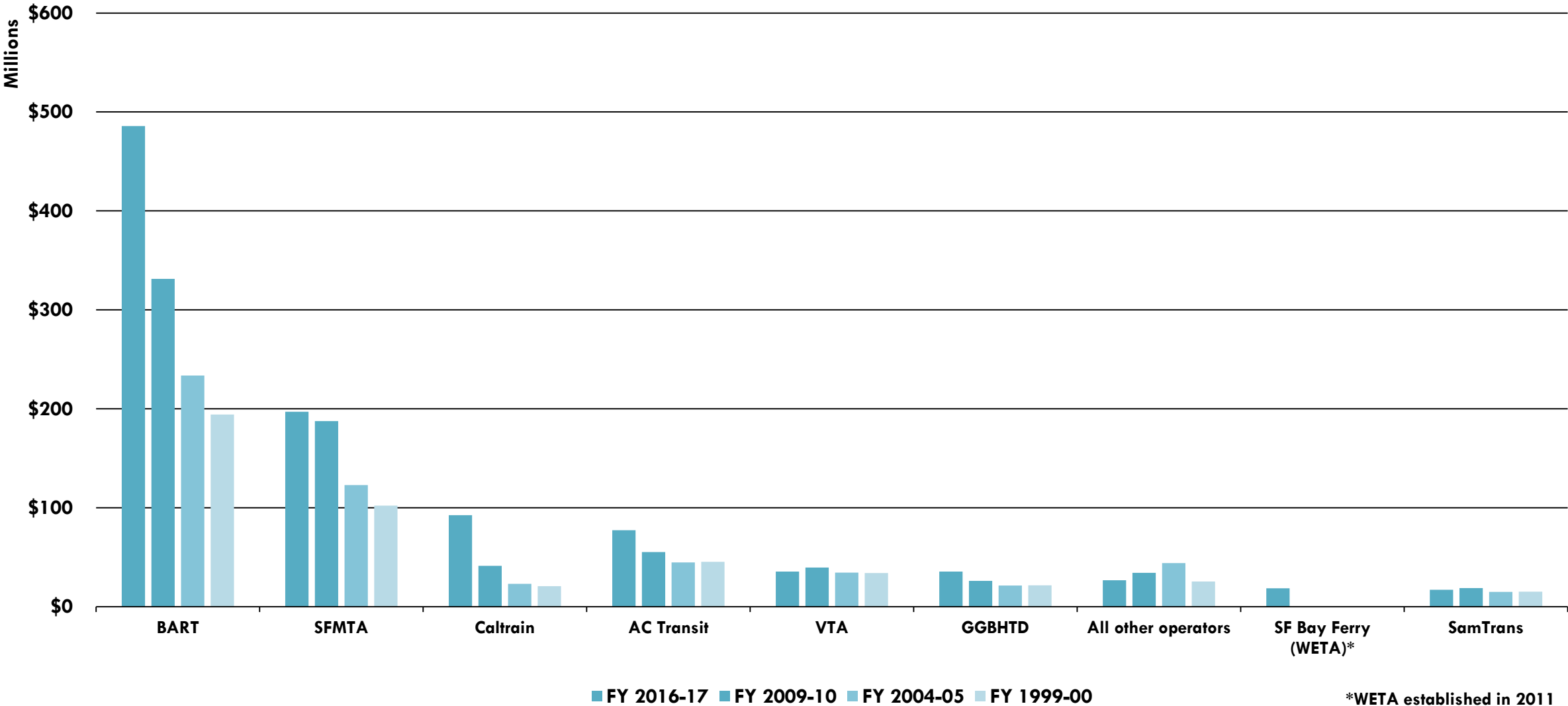


**Total Bay Area Fare Revenue, FY 2016-17**





# Fare Revenue by Operator





# Components of Fare Policy

Local Transit Fare	Regional Transit Fare
Discounted Fares	
Temporal Pricing	
Transfers (time windows, fare credits)	
Loyalty Incentives	



# Fare Systems in the Bay Area

**Flat fare = 7 operators**

**Flat fare/premium hybrid = 9 operators**

**Zone-based = 5 operators**

**Distance-based = 1 operator**





# Accumulator Model

## East Bay Day Pass on CCCTA, ECCTA, WestCAT, LAVTA

**1st Trip**  
Regular fare charged



**2nd Trip**  
Fare capped at maximum



**3rd+ Trip**  
Subsequent trips are free





A photograph of a Toronto GO train on tracks. The train is white with green accents and the number 353 is visible on the front. It is moving along several tracks that run parallel to a city street. In the background, the CN Tower and other high-rise buildings of the Toronto skyline are visible under a cloudy sky. A semi-transparent white box contains the title text.

# **Beyond the Bay: The Case for Fare Integration in Toronto**

**Martin Powell**



A black and white photograph of a large, arched glass and steel structure, likely a train station or market hall. The image shows a series of repeating arches supported by a complex steel truss system. Large, multi-paned arched windows are visible on the sides, allowing natural light to enter. The ceiling is high and features a series of smaller, circular lights. A semi-transparent white rectangular box is centered in the image, containing the text "Coffee Break" in a bold, black, sans-serif font.

# Coffee Break





# Co-creation Workshop



# Next Steps

**Where do we want to be in six months?**

**What is the best way to work together to improve the fare experience for customers?**





# Public Comment