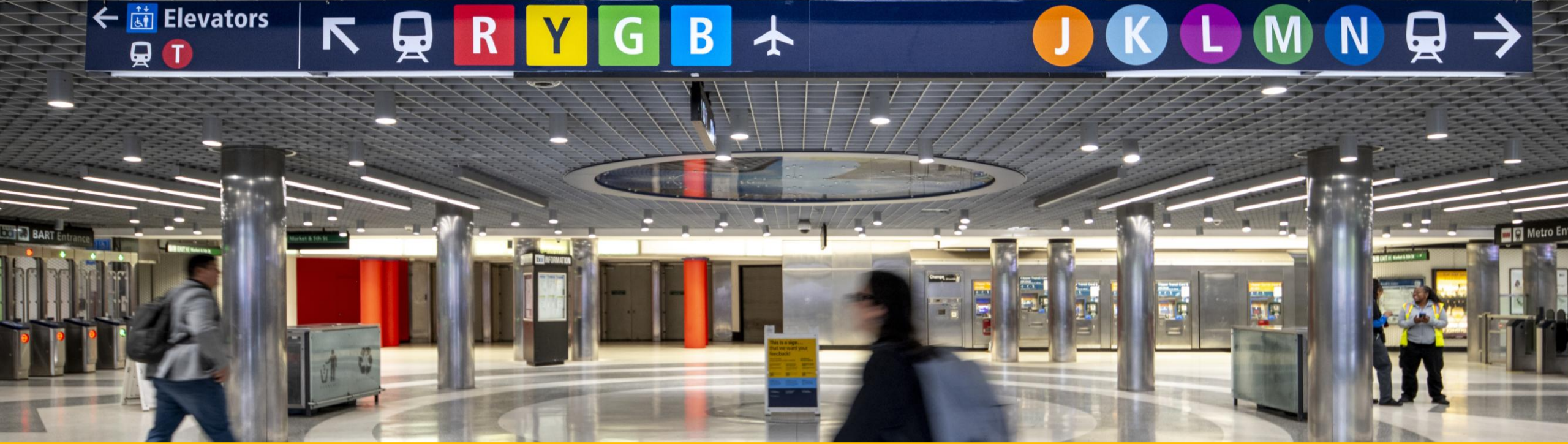




Regional Network Management: Transforming the Rider Experience

MTC Commission Workshop
October 22, 2025



METROPOLITAN
TRANSPORTATION
COMMISSION

Today's Focus

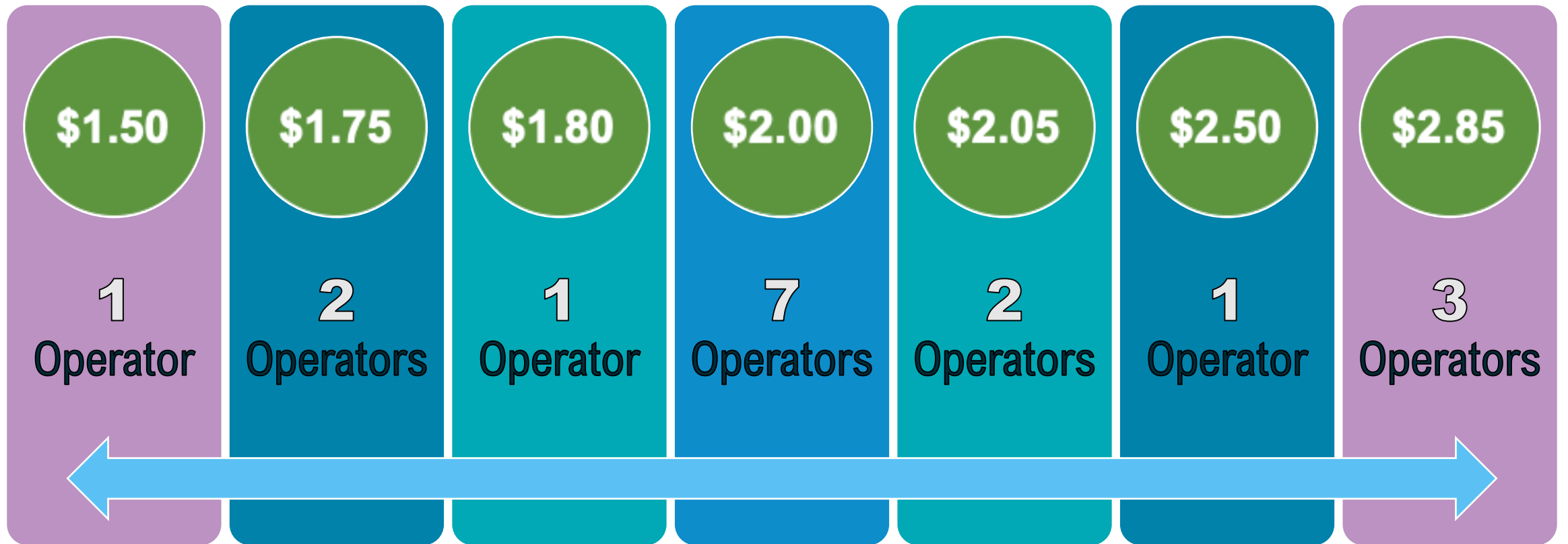
Fares & Payment

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

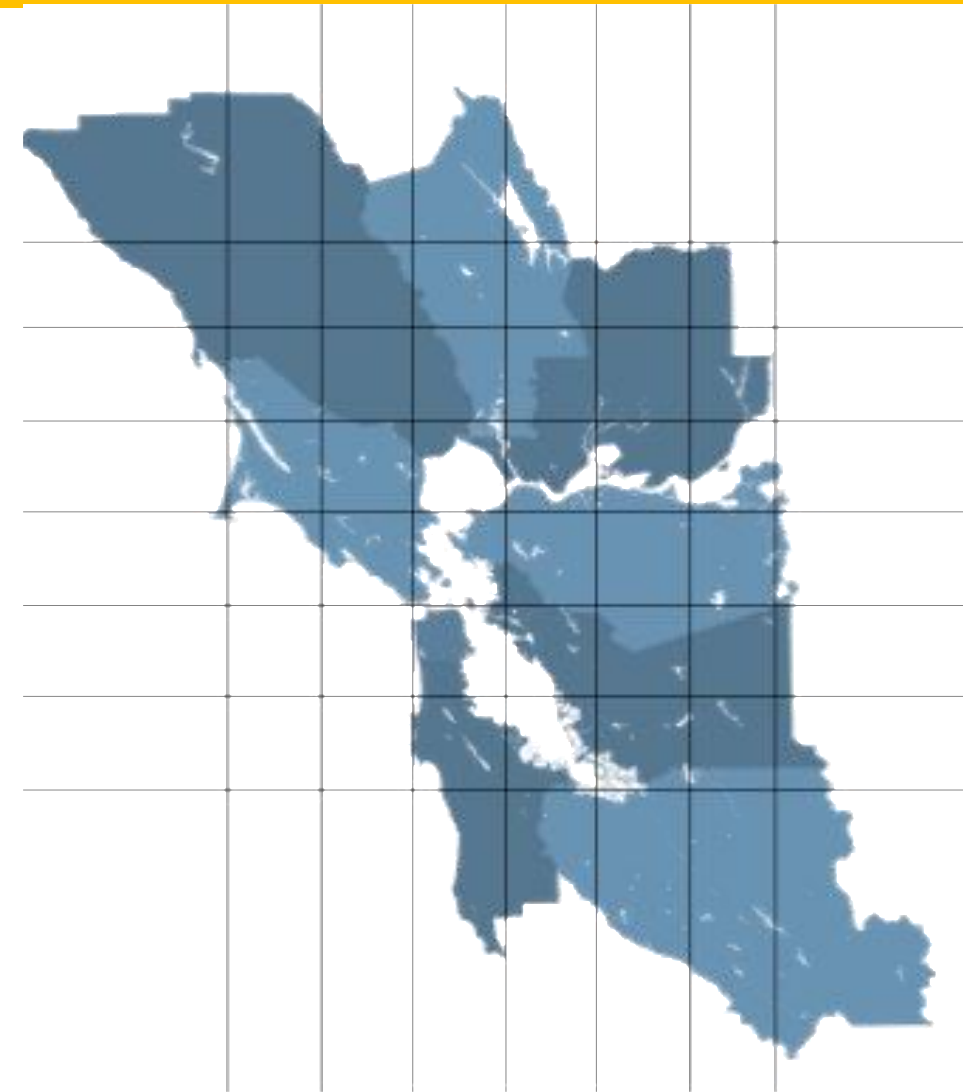
Distance/Route Based Fares

+/- 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



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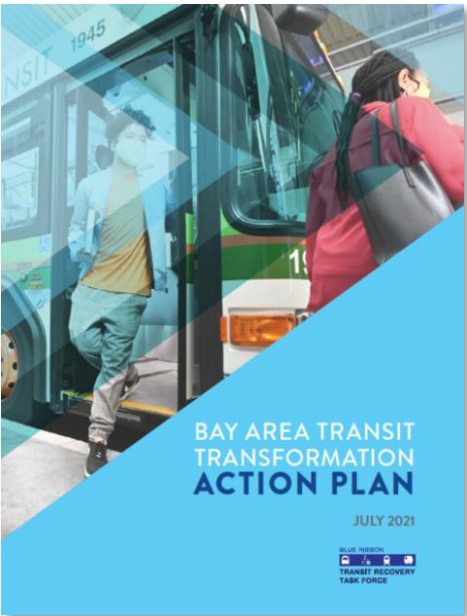
A photograph of a busy transit station. In the center, a wide set of concrete stairs leads up, flanked by metal railings. To the right of the stairs is a modern escalator with a glass and metal enclosure. Numerous people of various ages and ethnicities are using the stairs and escalator, moving upwards. The scene is captured with a slight motion blur, suggesting a busy, active environment. The station has a modern design with concrete pillars and large glass windows. A blue semi-transparent banner is overlaid across the middle of the image, containing the title text. In the bottom left corner, there is a photo credit, and in the bottom right corner, a safety sign is partially visible.

Transforming the Rider Experience

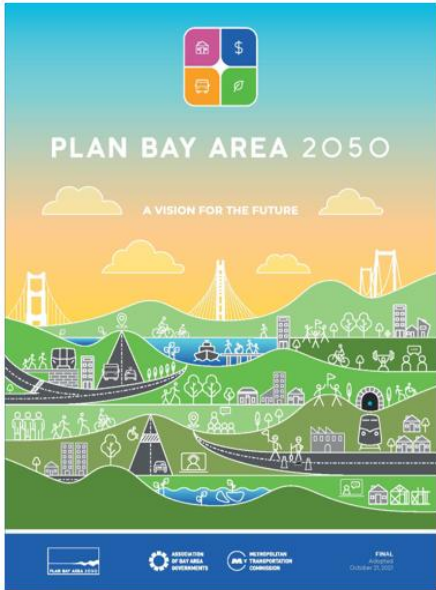
Photo: Karl Nielsen

For Your Sa
No running
No pushing

Plan Bay Area: Informed by Regional Studies

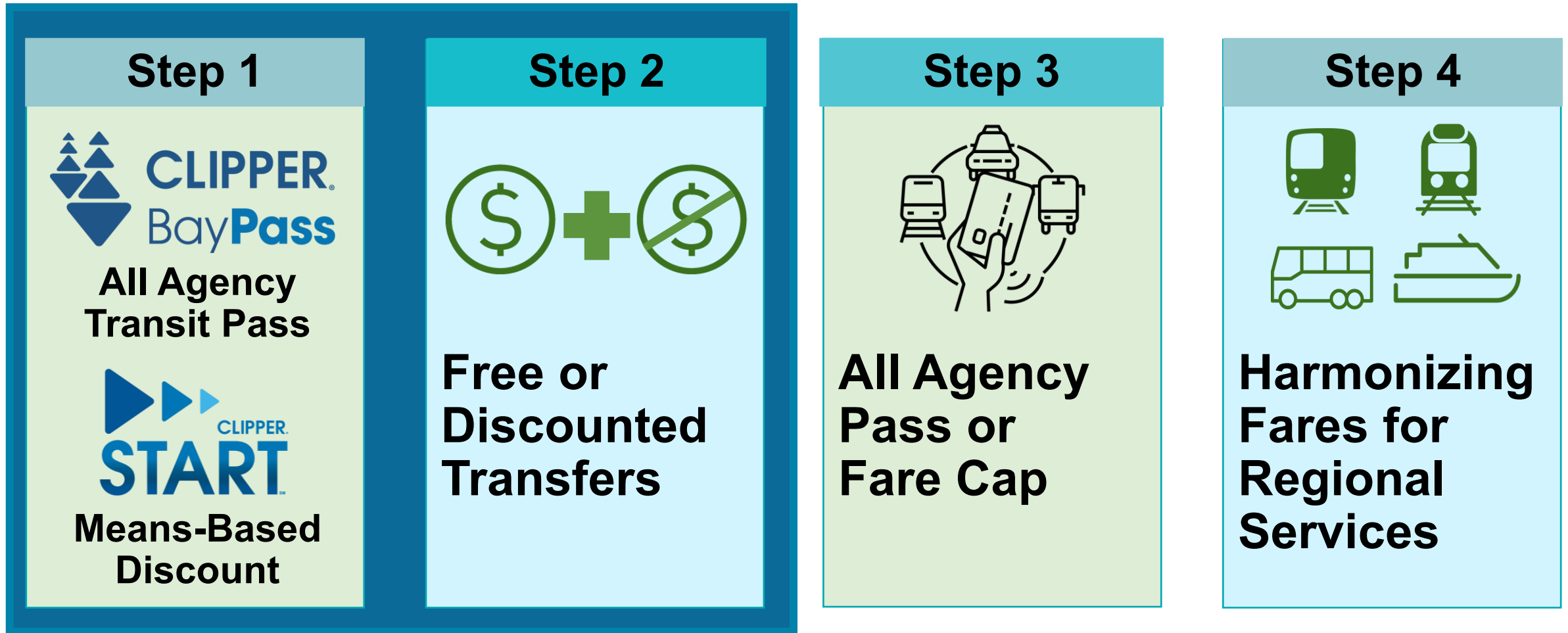


Actions 1-3



Strategy T4

Turning Studies into Outcomes for the Customer



Current focus areas



Increasing Ridership: Clipper BayPass Pilot



Clipper BayPass

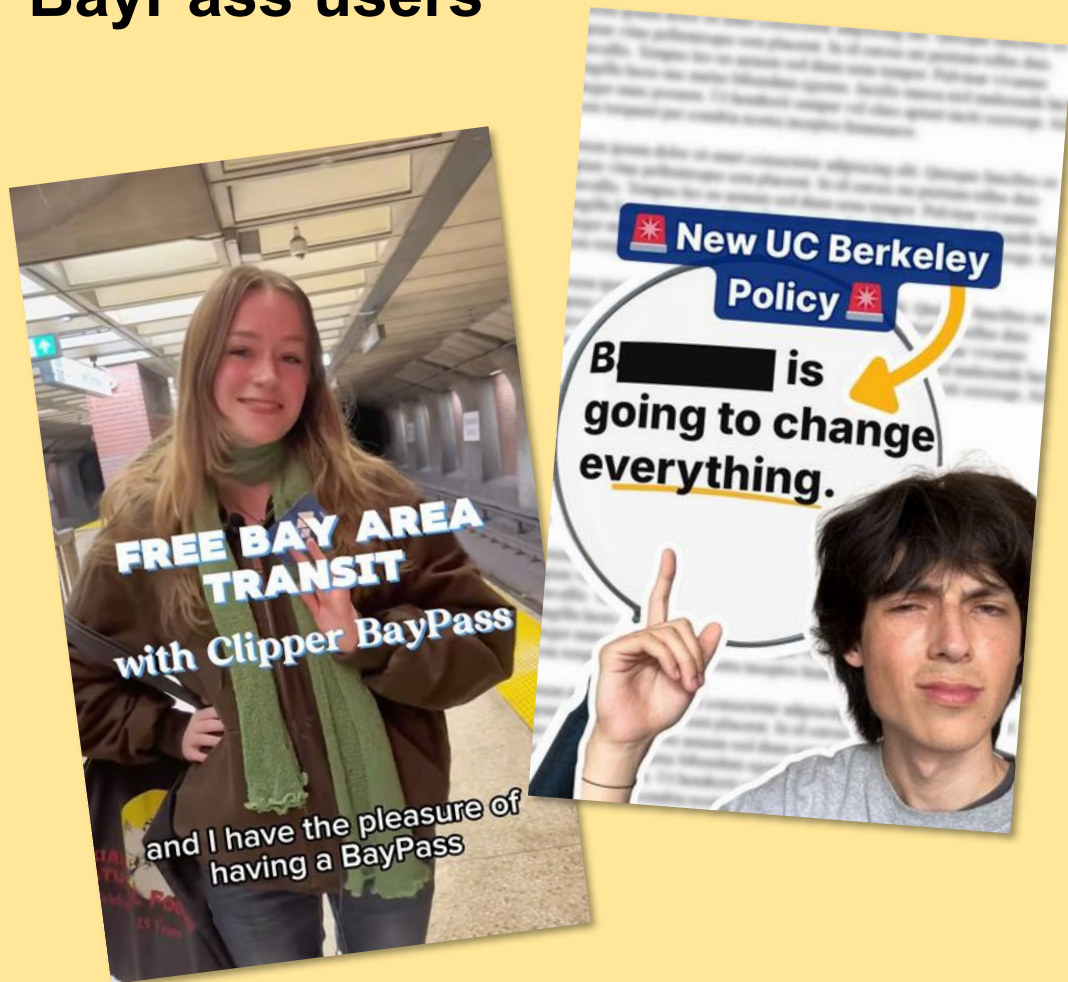
The Bay Area's first unlimited regional transit pass for rides on all bus, rail and ferry services in the Bay Area — anytime, anywhere.

- ▶ 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*

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

**Compared to middle and high-income students*



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

BayPass Phase 2 Early Findings

Launched January 2024

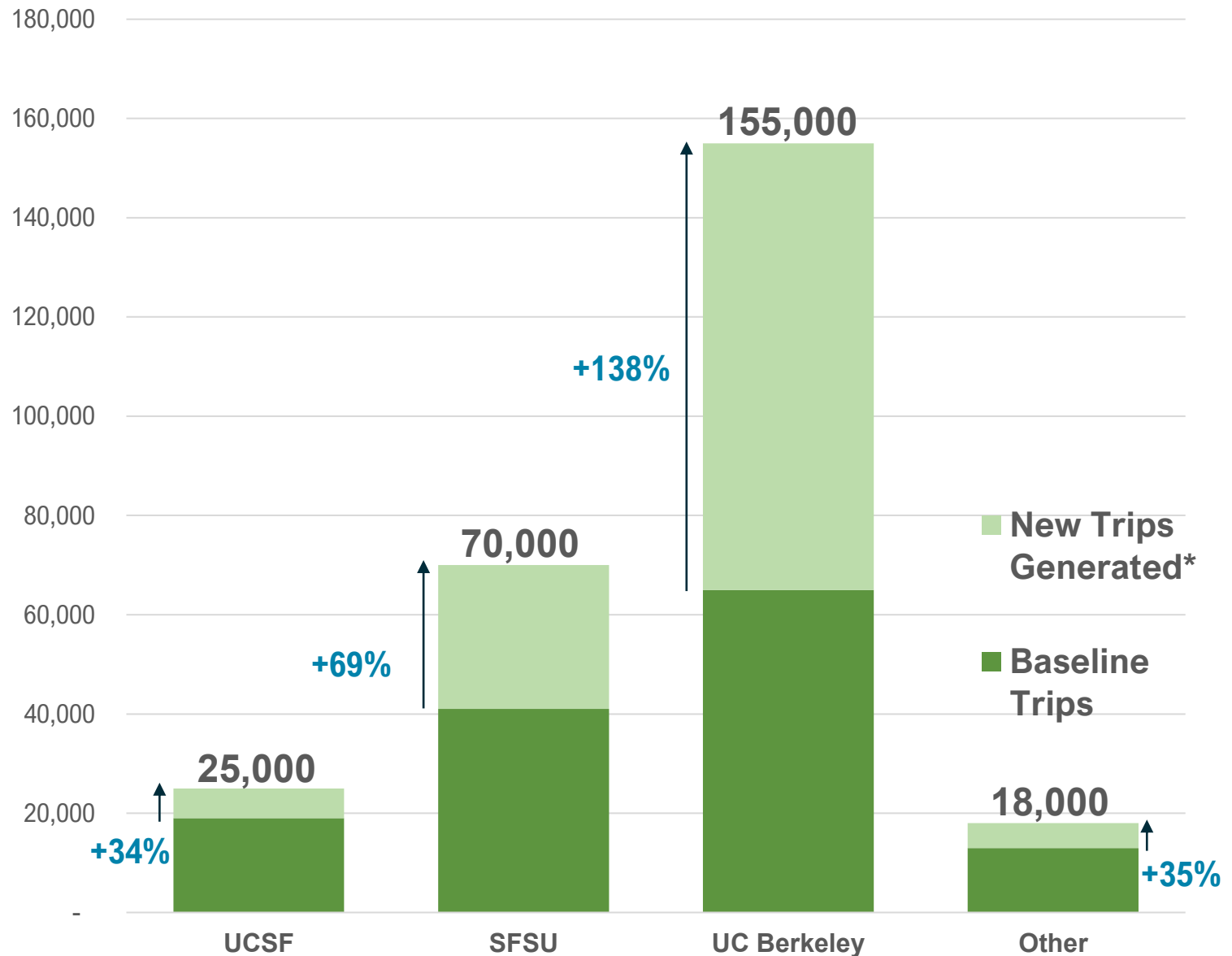
Preliminary findings indicate
users took **35% more transit
trips** in 2024 than in 2023



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)

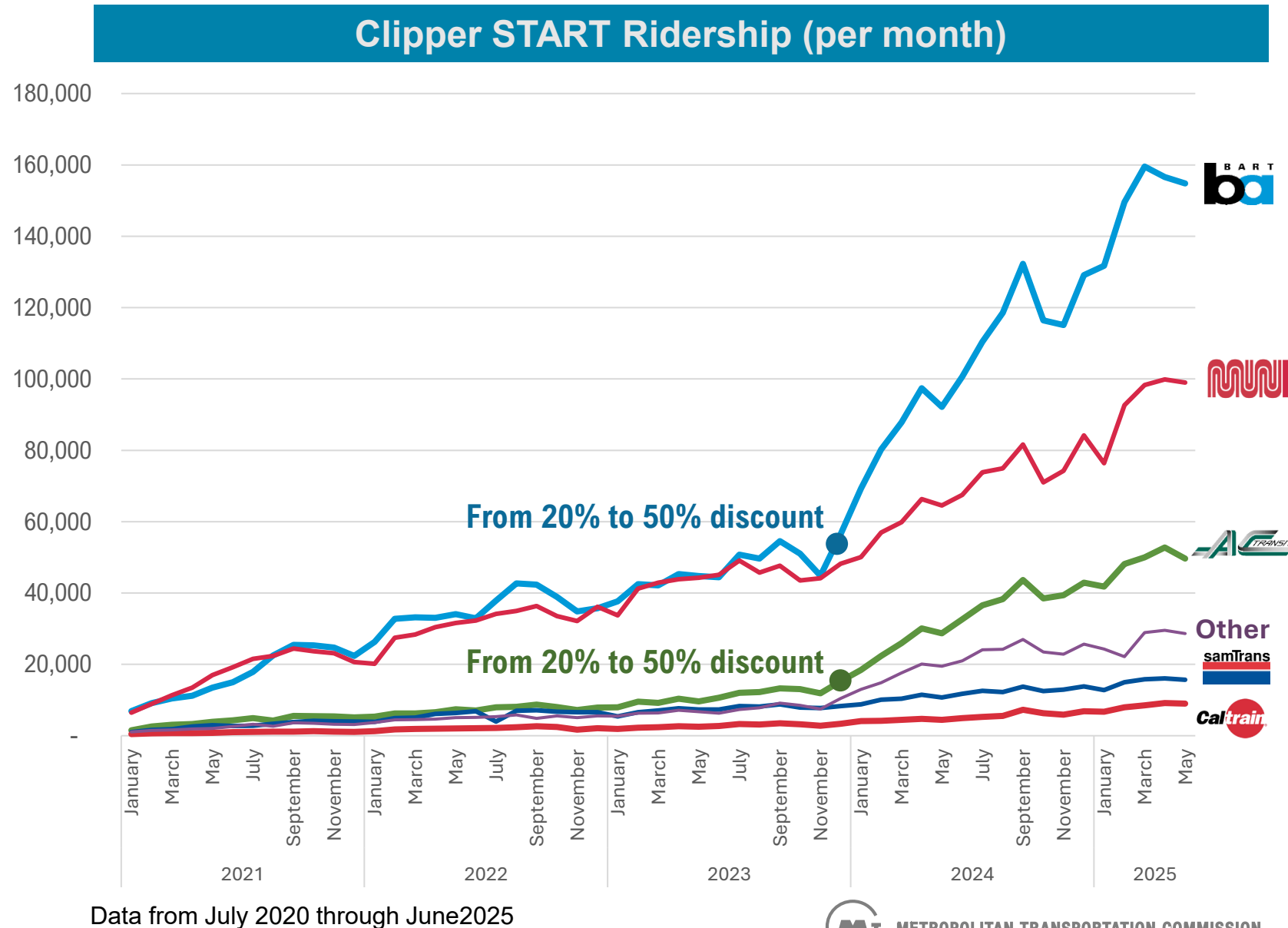


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Clipper START ridership has grown for all operators, with BART and AC Transit experiencing a sharp uptick in ridership in 2024 after these agencies increased the discount to 50%.

- ▶ **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



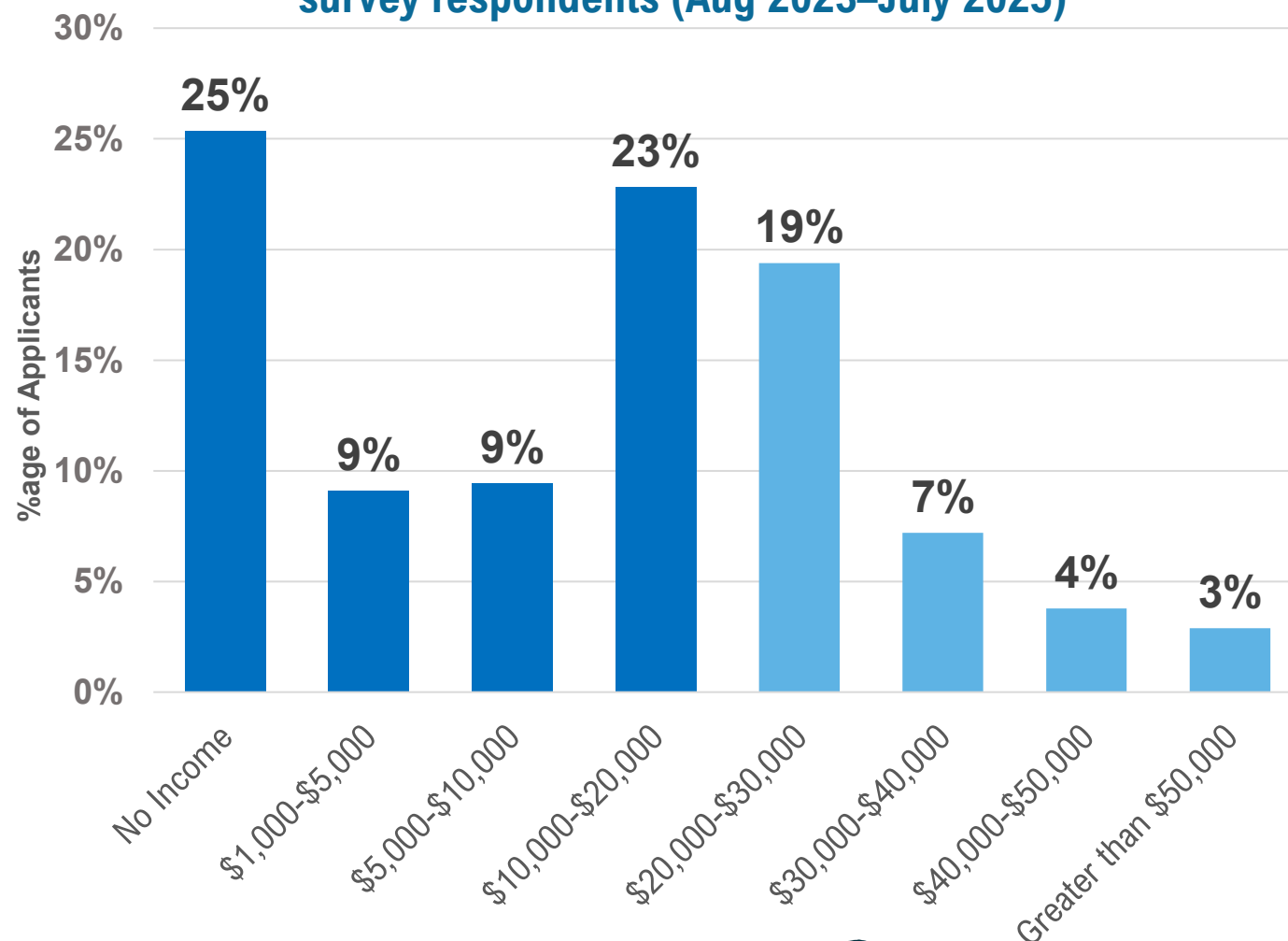
Clipper START Benefiting Frequent Transit Riders

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

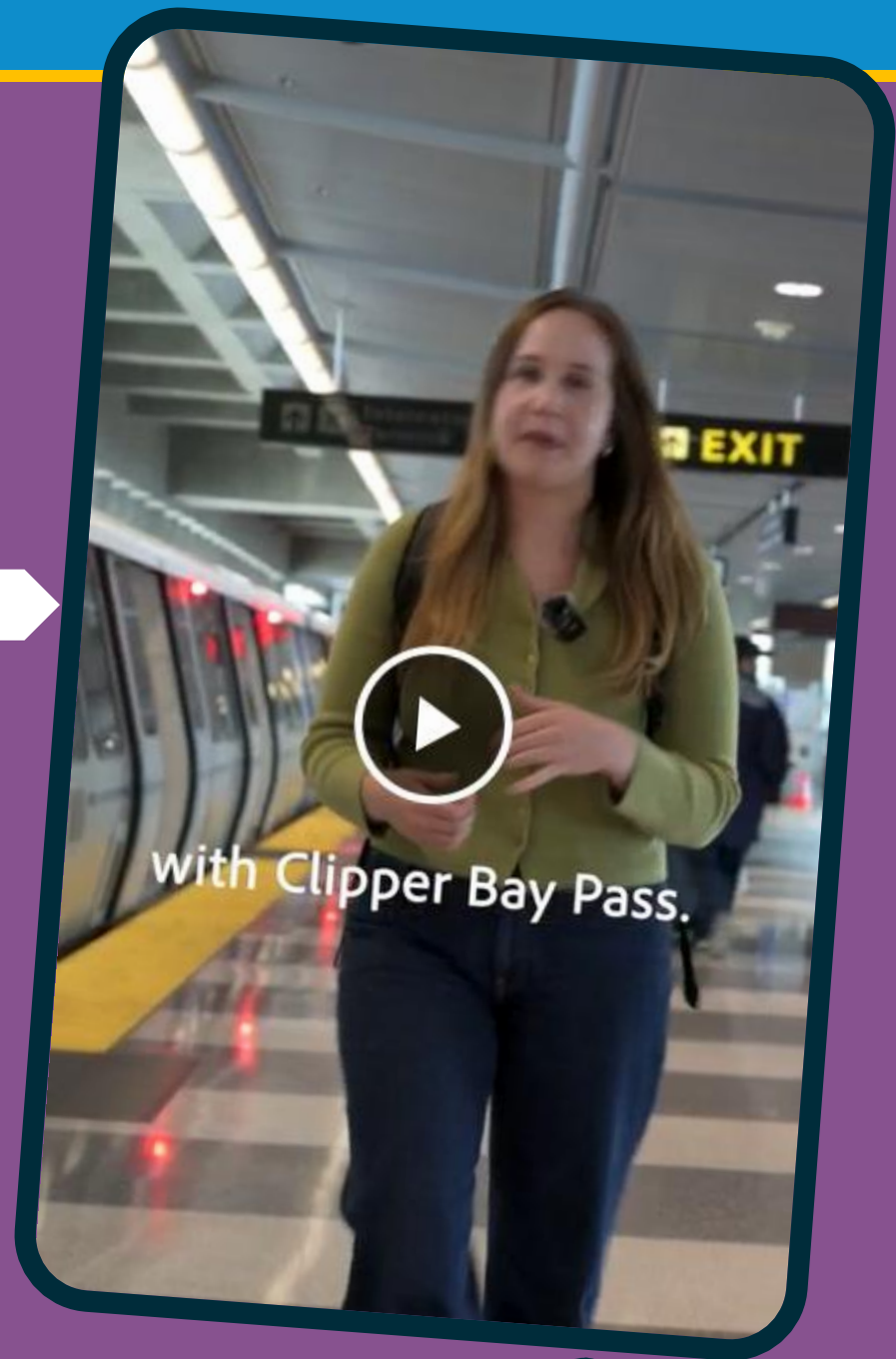
additional transit riders

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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