



Phase 1 Evaluation Results

Regional Network Management Council

September 22, 2025

Agenda Item 3c - Attachment B



METROPOLITAN
TRANSPORTATION
COMMISSION



BayPass Pilot Overview

The Clipper BayPass Pilot is the Bay Area's first regional unlimited-ride transit pass.

BayPass users have unlimited access to all bus, rail, and ferry services* in the nine-county Bay Area region that accept Clipper, at no cost at the point of use.

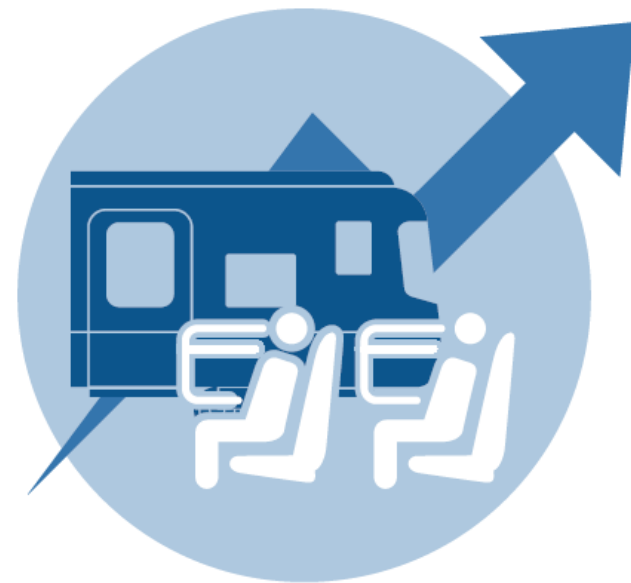


BayPass Pilot Goals



The **Transit Fare Coordination and Integration Study**, led by BART and MTC, recommended a pilot employer or institutional pass program, offering “all-you-can-ride” passes for employees / members.

The BayPass pilot was designed to evaluate the impact that an unlimited institutional regional transit pass may have on:



***Increasing transit
ridership***



***Generating new
transit revenues***



***Improving customer
experience and
attitudes towards
transit***

BayPass Pilot Phases



Phase 1

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

Randomized controlled trial

Funded by transit operators and MTC

2022-2025

Phase 2

Pilot with over 40,000 Employees, Transportation Management Association Members, and Property Residents (and growing!)

Funded by Payments from Participating Employers/Institutions

2024-2027

Phase 1 Pilot Overview

51,300 participants:

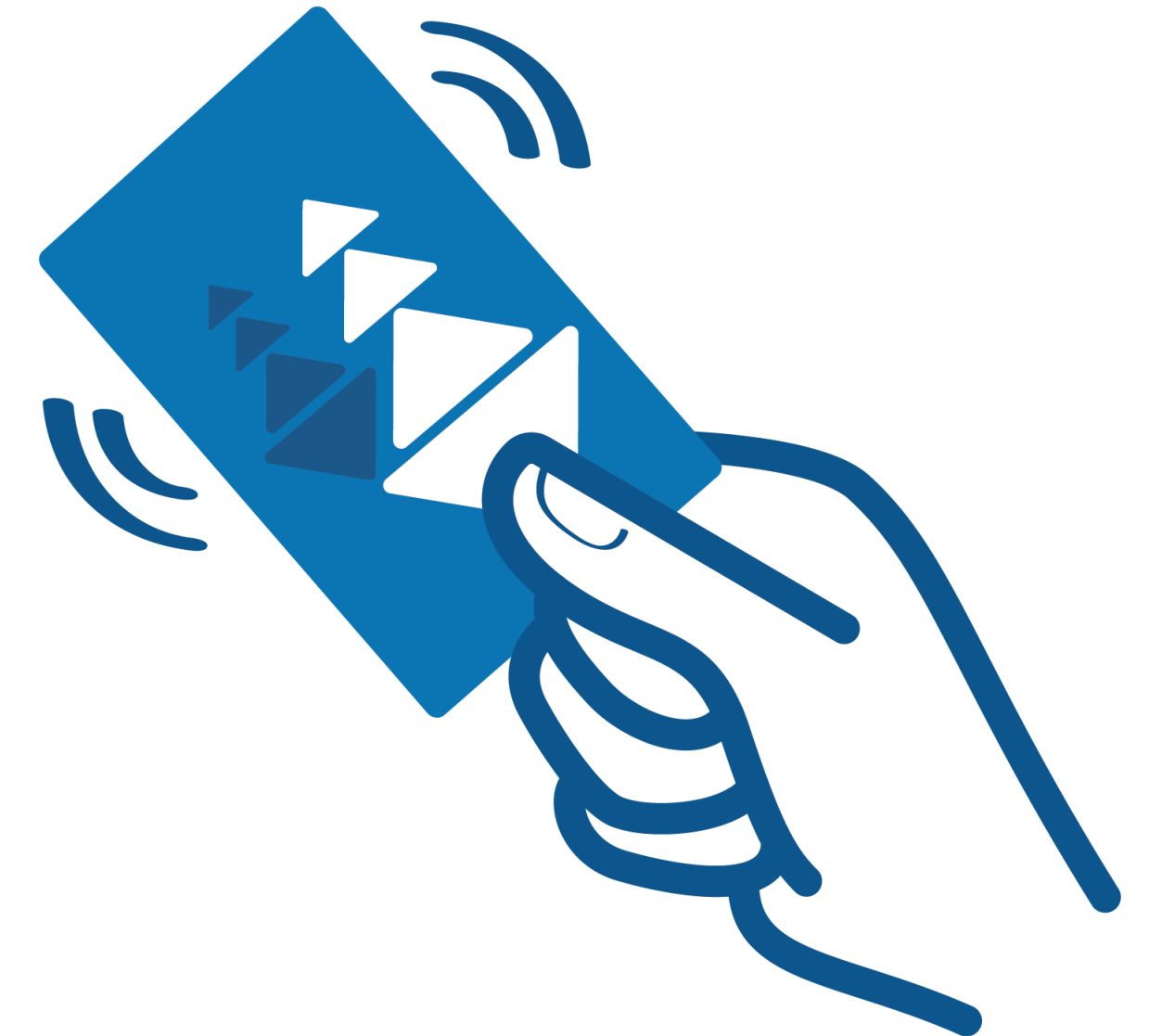
- Randomly selected students at:
 - San Francisco State University (9,000)
 - San José State University (7,000)
 - UC Berkeley (12,000)
- All students at:
 - Santa Rosa Junior College (21,000)
- All residents at:
 - 12 MidPen Housing properties (2,300)
- The Phase 1 Pilot is operating through June 30, 2025. However, the program evaluation focuses on the period between August 15, 2022, and June 30, 2024.



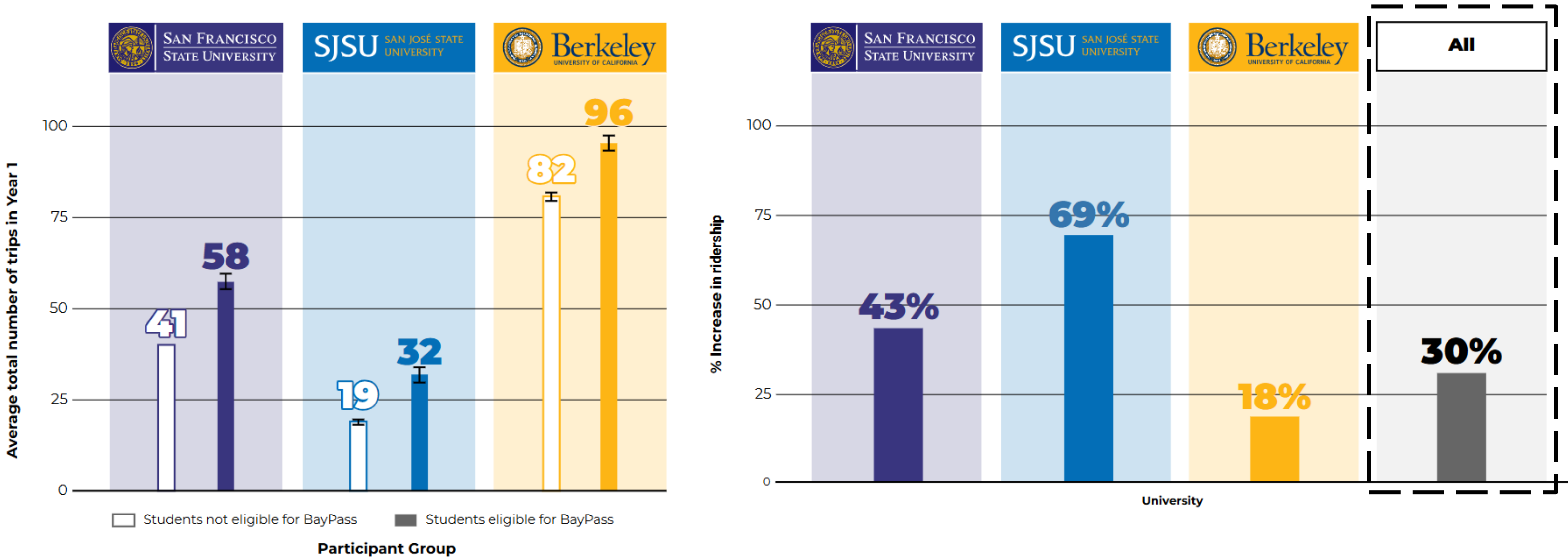
Phase 1 Pilot Key Findings

The Phase 1 program evaluation found that, on average, **SFSU**, **SJSU** and **UC Berkeley** students with access to Clipper BayPass:

- Took **30%** more transit trips;
- **the impact of BayPass on transit trips taken was approximately two times greater for low-income students** than for middle- and high-income students*;
- Made **163%** more inter-transit-agency transfers;
- Were between **6%-15%** less likely to leave their university between Fall 2022 and Fall 2023.



Phase 1 Pilot Key Findings - Ridership



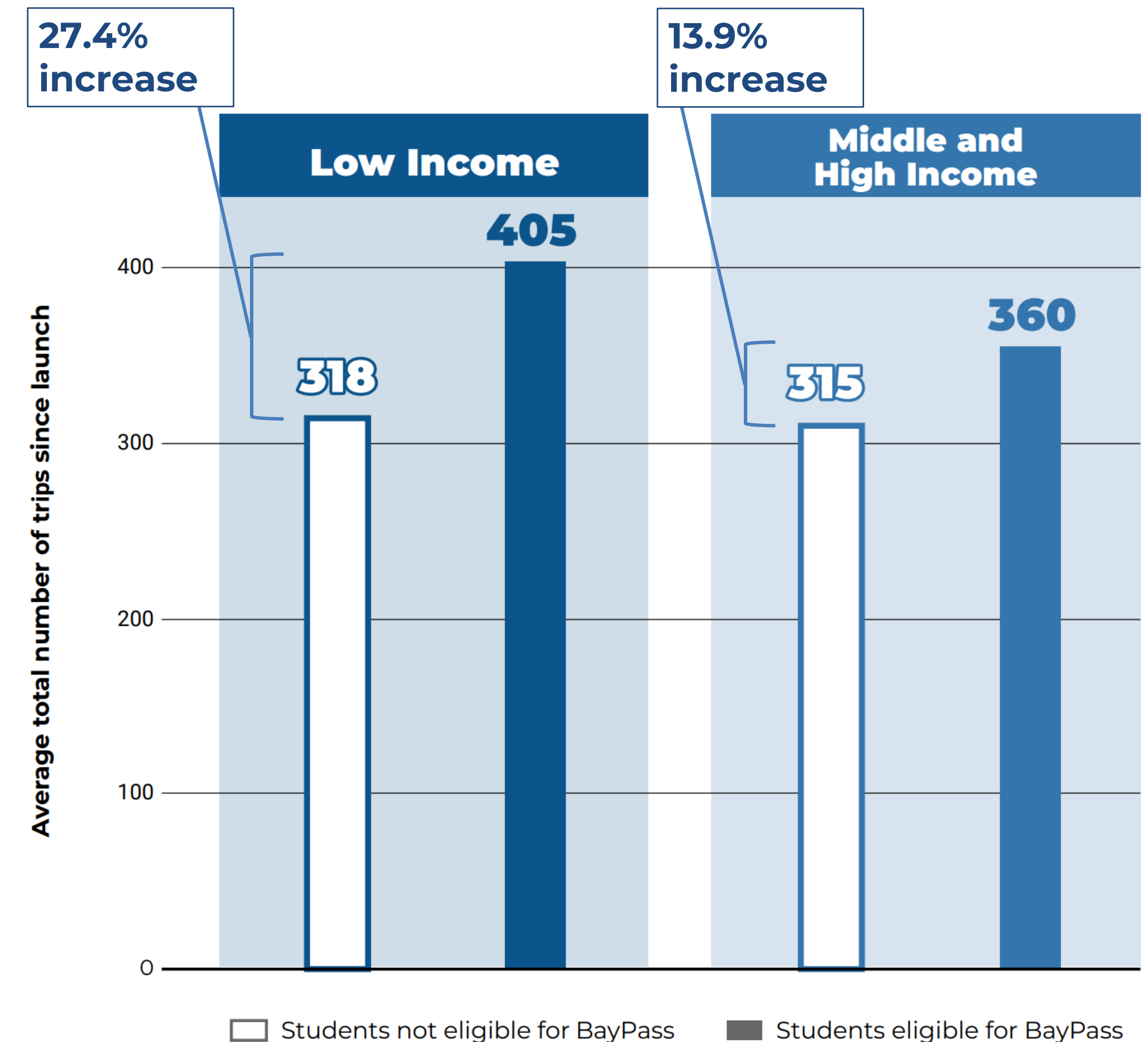
Through Year 1 of the pilot, BayPass increased transit ridership by 30% on average at the universities with preexisting institutional pass programs.

Phase 1 Pilot Key Findings – Ridership Impacts by Income

The impact of BayPass on transit trips taken was approximately two times larger for low-income students than for middle- and high-income students

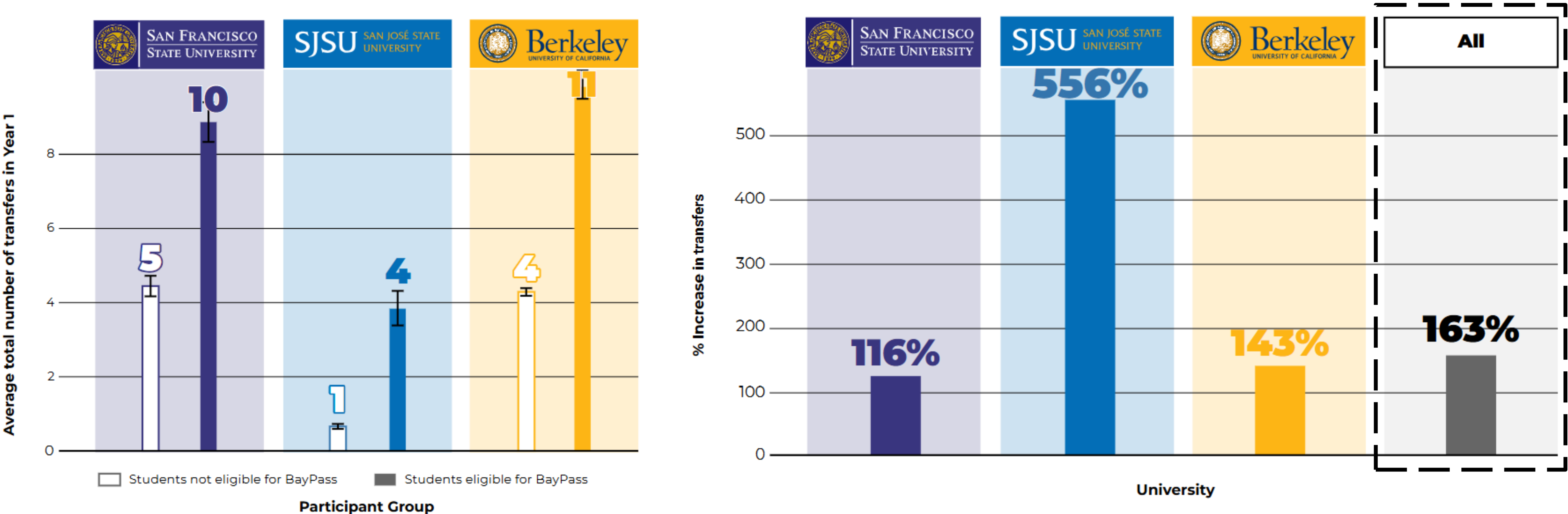
Among a subset of student survey respondents:

- **BayPass increased transit use by 27.4% for low-income students** over the course of the study period.
- **BayPass increased transit use among middle- and high-income participants transit use by 13.9%** over the course of the study period.



Average number of trips by income through year two of the Phase 1 Pilot

Phase 1 Pilot Key Findings - Transfers



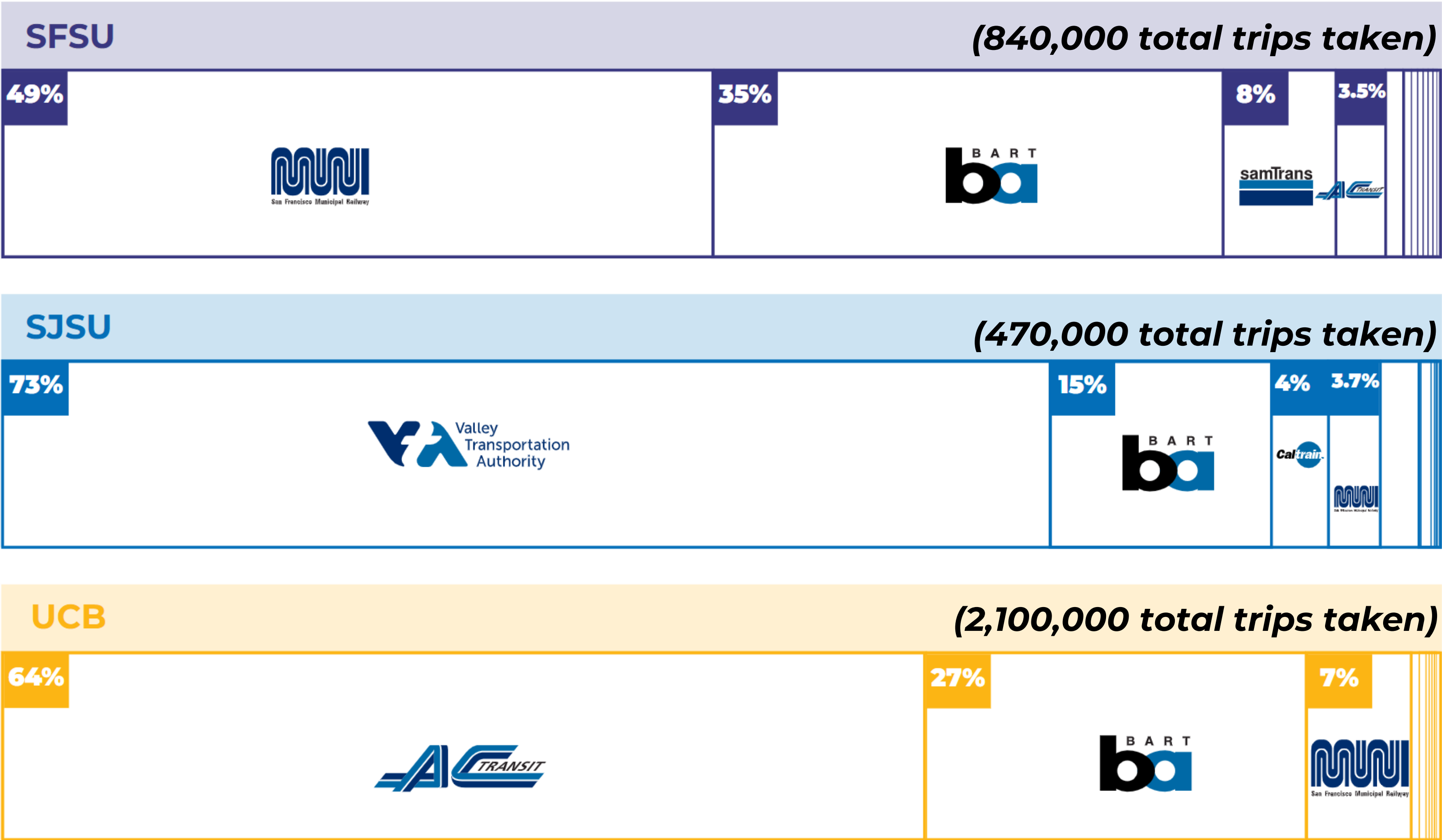
Through Year 1 of the pilot, BayPass increased transfers between transit agencies by **163%** on average.

Phase 1 Pilot Key Findings – Trips by Operator



To provide additional context regarding patterns in transit use by partner institution, the tree maps show the **share of total trips taken by individuals with BayPass at each institution by transit operator.**

Right: Breakdown of trips by transit agency since Phase 1 launch at SFSU, SJSU and UCB

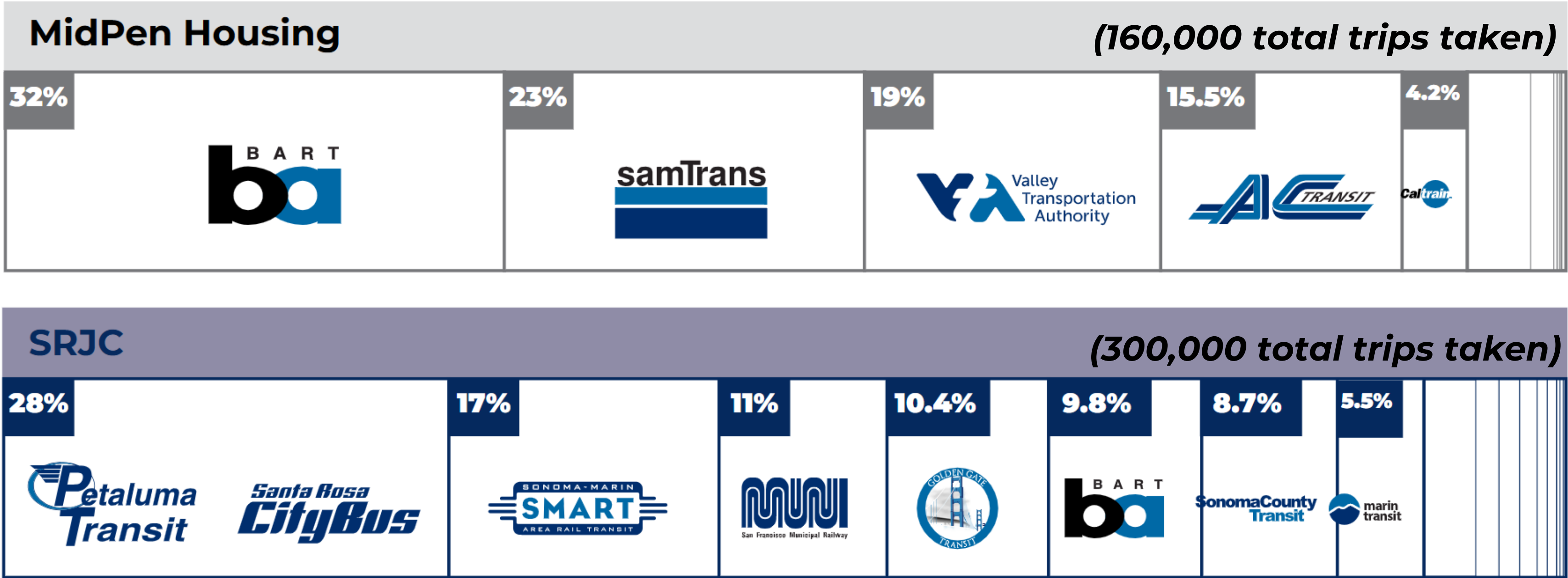


Phase 1 Pilot Key Findings - Trips by Operator



To provide additional context regarding patterns in transit use by partner institution, the tree maps show the **share of total trips taken by individuals with BayPass at each institution by transit operator.**

Right: Breakdown of trips by transit agency since Phase 1 launch at MidPen Housing and SRJC



Phase 1 Pilot Key Findings - Attrition



BayPass participants were between 6%-15% less likely to leave their university between Fall 2022 and Fall 2023.



Analysis of Anonymized Student Identifier Data Provided by Universities

Note: The calculated attrition rates for BayPass eligible and non-BayPass eligible students are based solely on groups of students at each institution who were eligible for institutional transit passes in Fall 2022 and Fall 2023. Student transit pass eligibility may differ by university and may extend beyond undergraduate and graduate students to include certificate, continuing education or other student types. A future analysis, with access to more granular student type data, might consider evaluating the impact of increased access to transit on attrition by student type.

Phase 1 Pilot Survey - Perceptions



Approximately 90% of university survey respondents indicated that:

- “the BayPass helped them get to and from new locations in the Bay Area”, and
- “since receiving the Clipper BayPass they were more likely to use public transportation options in the Bay Area”.

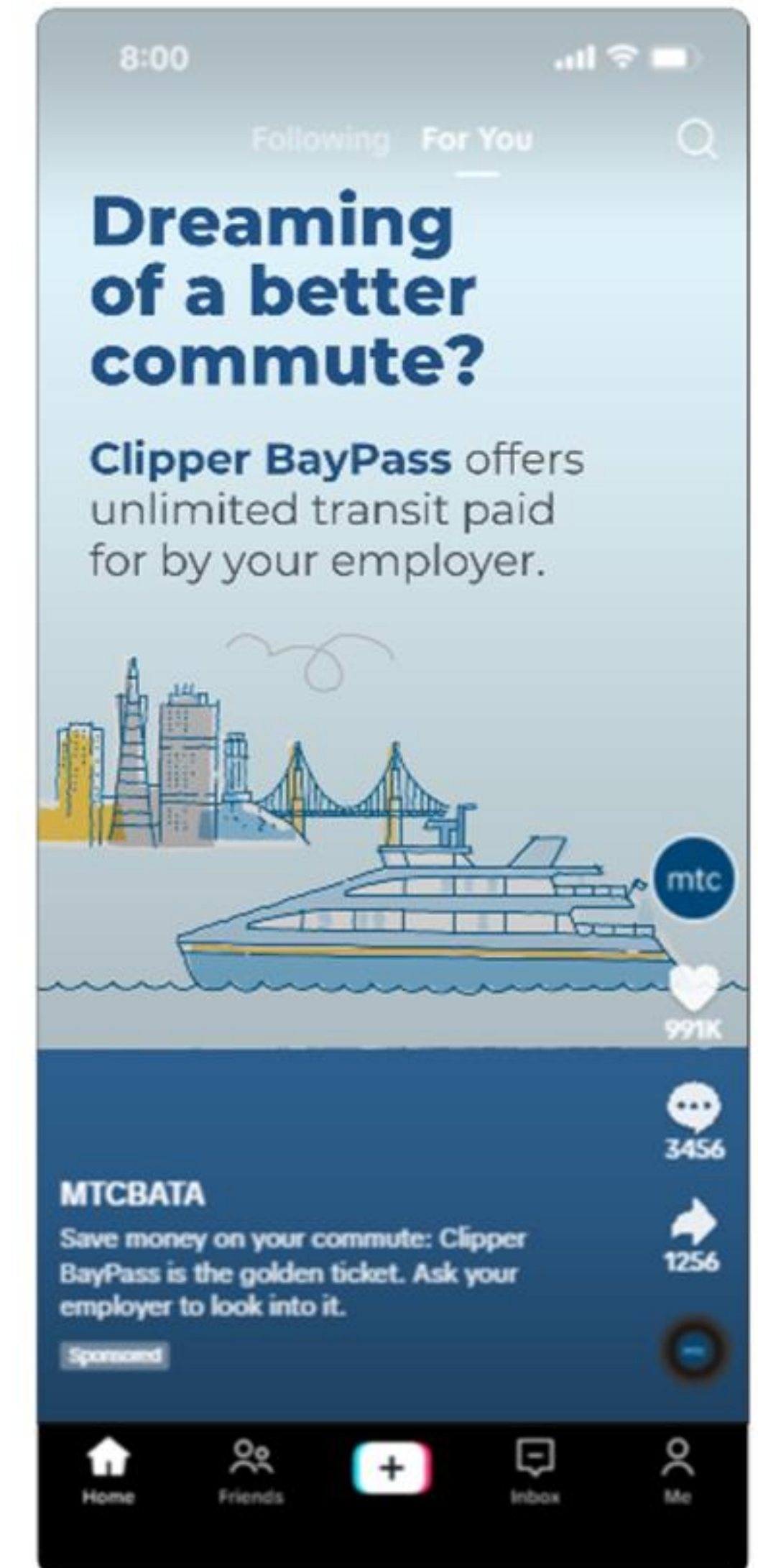


BayPass Phase 2 – Where We're Headed



In BayPass Phase 2, we are selling the Clipper BayPass to interested organizations

- Over 86,000 paid-passes in Phase 2, including 16 contracts with organizations
- UC Berkeley and SF State both continued into Phase 2 – purchasing BayPass for all students
- Continuing to grow and expand ridership for the region's first all-access transit pass program



Early Findings from BayPass Phase 2

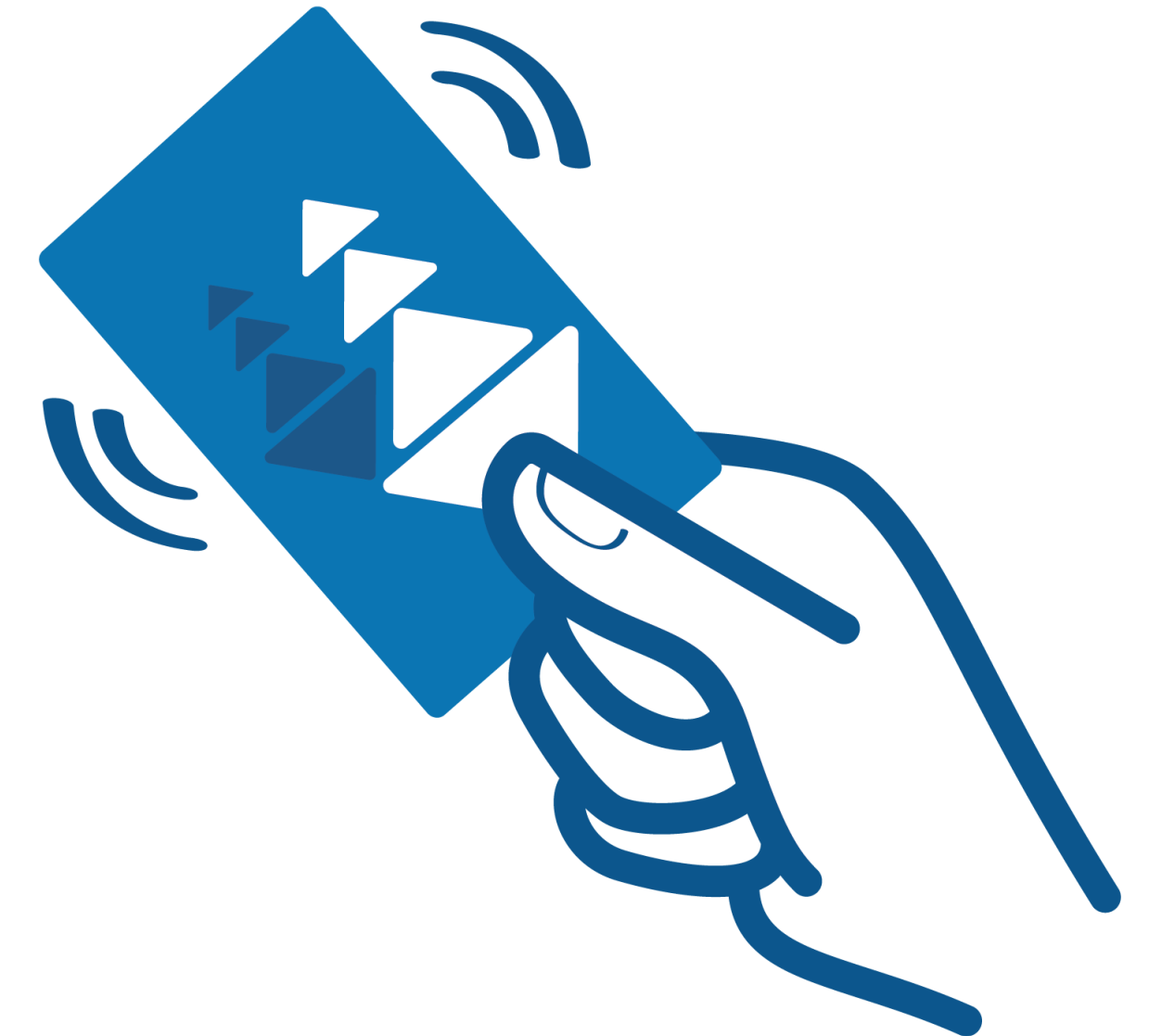


Phase 2 launched in January 2024 at **UCSF (8,000 eligible individuals)**, **Alameda TMA (2,100 eligible individuals)** and **City of Menlo Park (200 eligible individuals)**. In aggregate, individuals eligible for BayPass at these organizations:

Took **35% more transit trips** in 2024 than in 2023

This increase in trips taken at these partner organizations alone (among 10,300 eligible individuals) generated approximately **\$1.1M in additional fare revenue** in FY25 versus the status quo

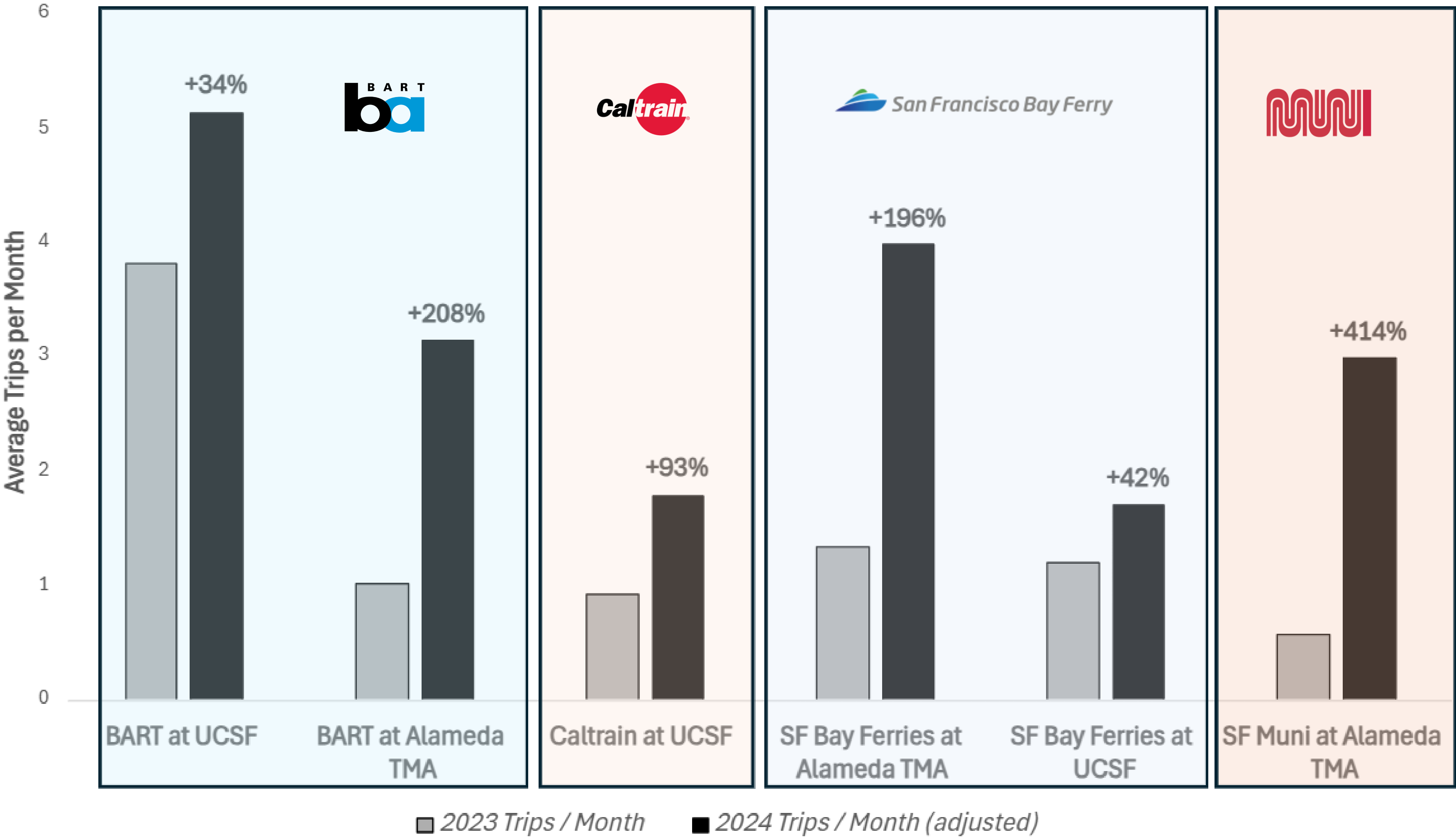
About 8x more individuals are currently eligible for BayPass than were eligible at the beginning of 2024



Early Findings from BayPass Phase 2



Differences -in-differences Analysis: Estimating Impact of BayPass on Trips Taken / Month



Early Findings from BayPass Phase 2



Takeaways from UCSF, City of Menlo Park and Alameda TMA survey responses:

The share of survey respondents indicating that public transit was a “very appealing” option for travelling in the Bay Area increased by 5x since they received BayPass

The share of survey respondents indicating that they were more likely to stay at their current job increased by 44% since they received BayPass

A majority of survey respondents indicated that they use transit more for things like work, school, healthcare and recreation since they received BayPass

Quotes from BayPass survey respondents:

"The Bay Pass has saved me a tremendous amount of money. I use it to commute to several jobs and it has been an absolute game changer for me"

"It is a tremendous relief knowing I can use the bus freely, multiple times a day without having to consider costs. It makes a huge difference in my quality of life and encourages me to use public transit over my car. "