



BART Fare Programs & Ridership Update

BART Board of Directors

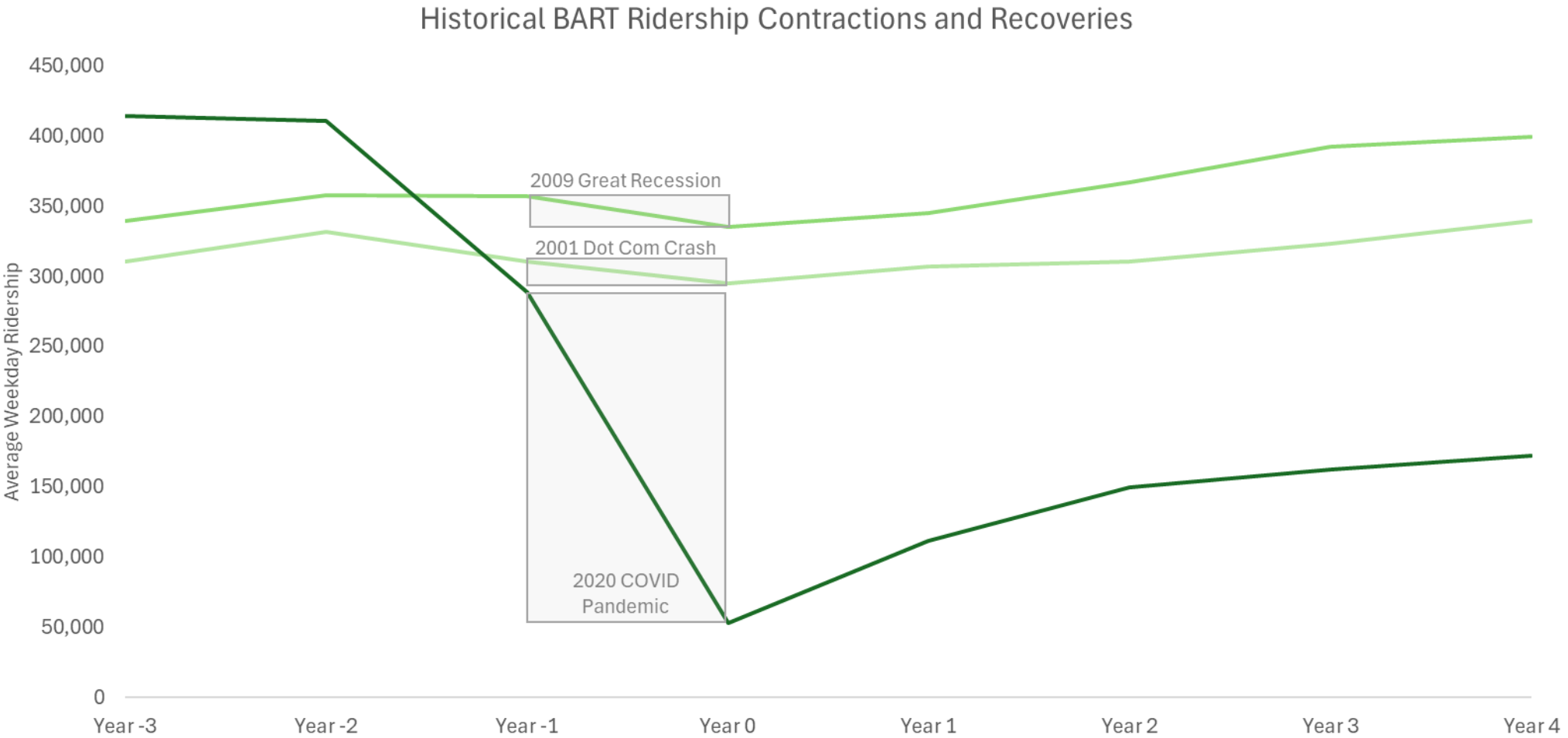
October 9, 2025



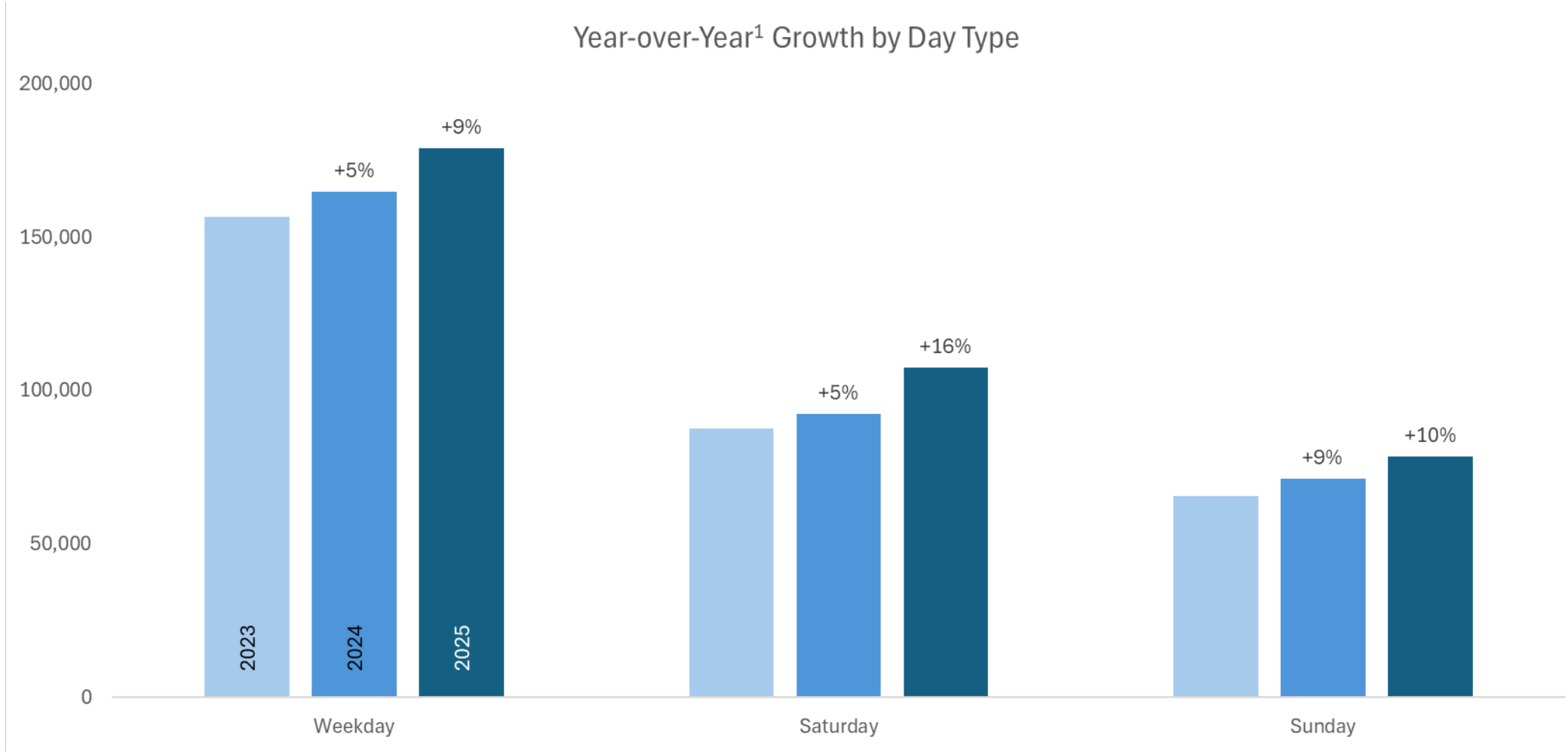
Agenda

- Ridership Trends
- Fare Program Updates:
 - Tap & Ride
 - Clipper BayPass
 - Clipper START

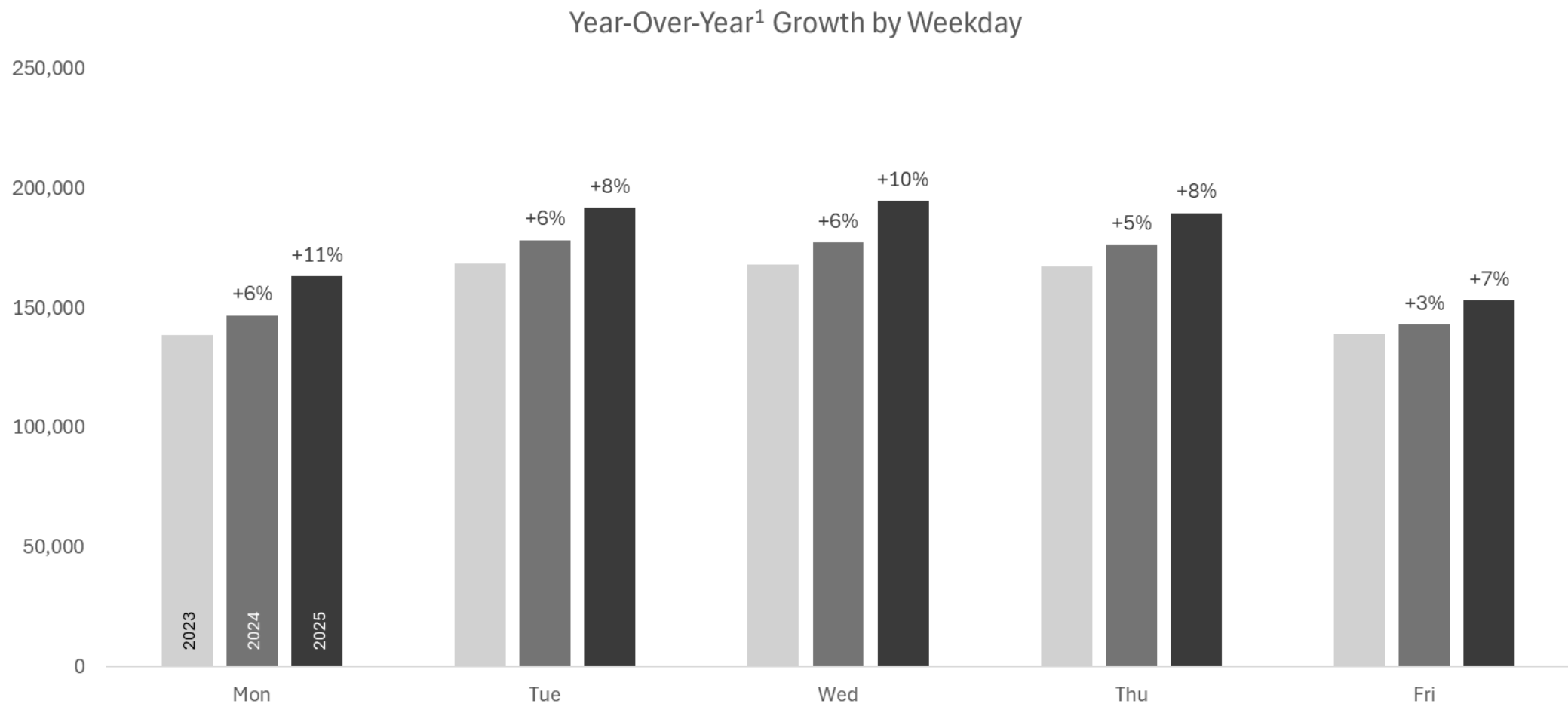
BART ridership continues to recover, but remains far from pre-pandemic levels



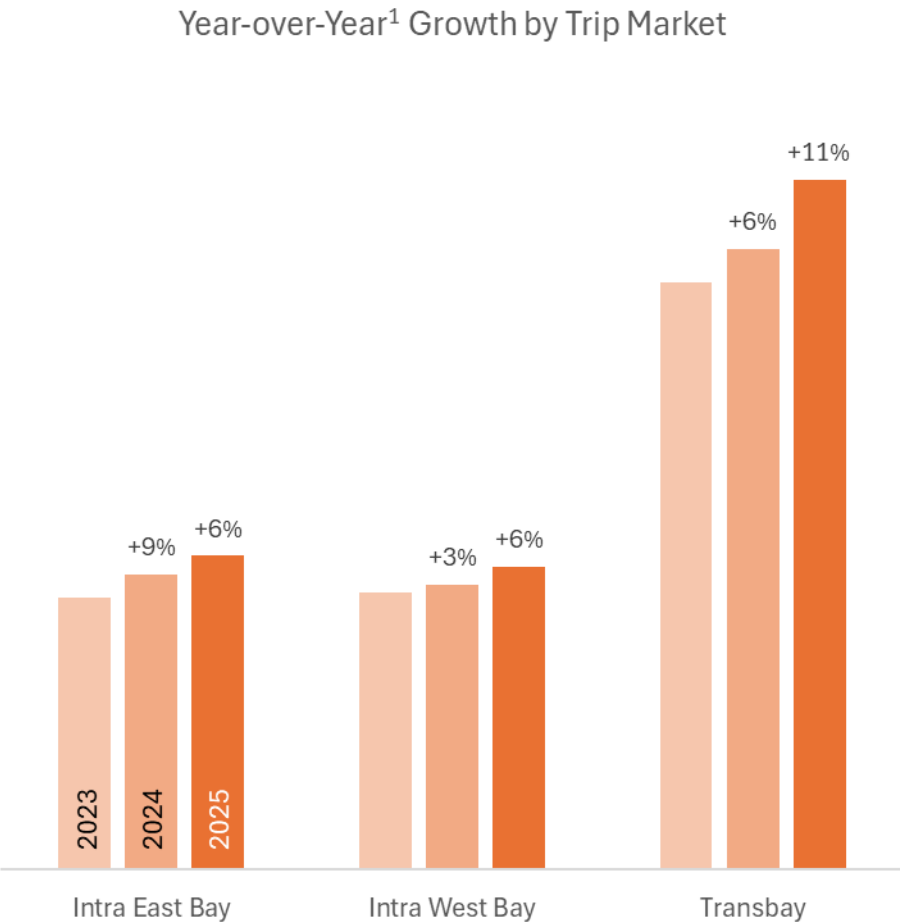
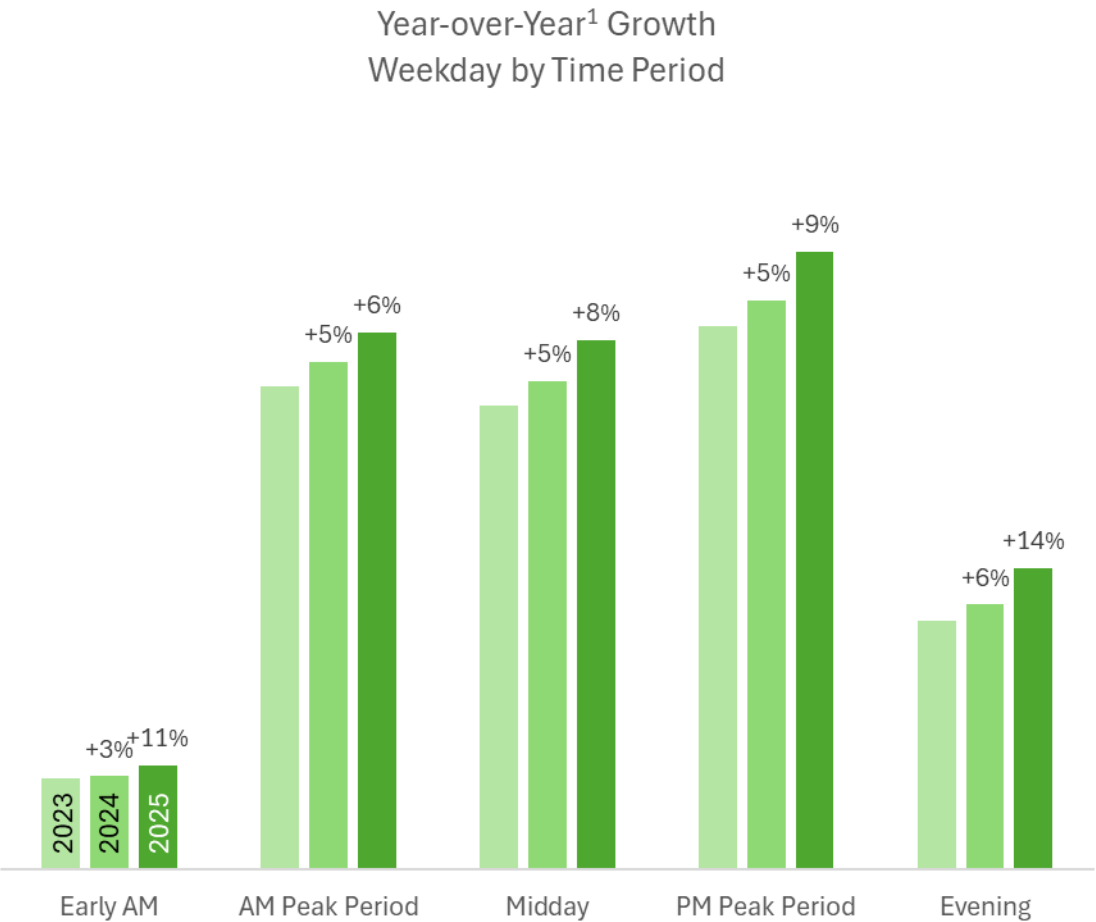
Ridership growth has picked up in FY25, especially on weekends



Ridership growth varies by day-of-the-week



The strongest growth this year has been in the Transbay market and during the evening



1. Compares Jan through Sep for each year



Ridership growth alone won't solve budget shortfalls

- FY26 Budget forecast assumes:
 - \$259M of fare revenue and
 - ~4% annual ridership growth
- Each additional **5% growth in ridership = +\$13M/year**
- To close our ~\$375M deficit with just fare revenue, ridership would need to **more than double**
- Ridership and fare revenue growth is **part of the solution**, but other revenue is needed

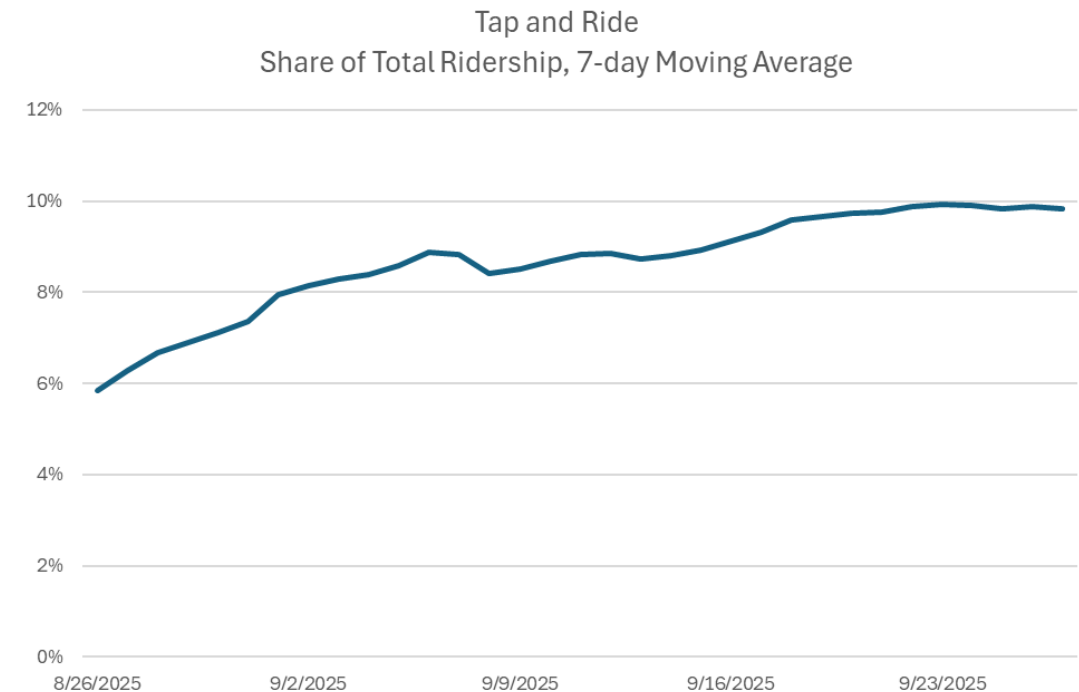
Ridership by Fare Program

	Share of Total Trips		Total Trips
Fare Program	Sep 2024	Sep 2025	Sep 2025
Clipper Adult	74.9%	63.2%	3,192,158
Tap and Ride	0.0%	8.5%	429,948
Clipper Senior	8.1%	8.1%	408,624
Clipper High Value Discount	6.1%	5.8%	292,593
Clipper BayPass	2.4%	5.3%	267,512
Clipper START	2.6%	3.4%	170,492
Clipper Youth	2.3%	2.2%	108,568
Clipper Access (RTC)	2.0%	1.9%	95,726
Clipper MUNI FastPass	1.7%	1.6%	81,364

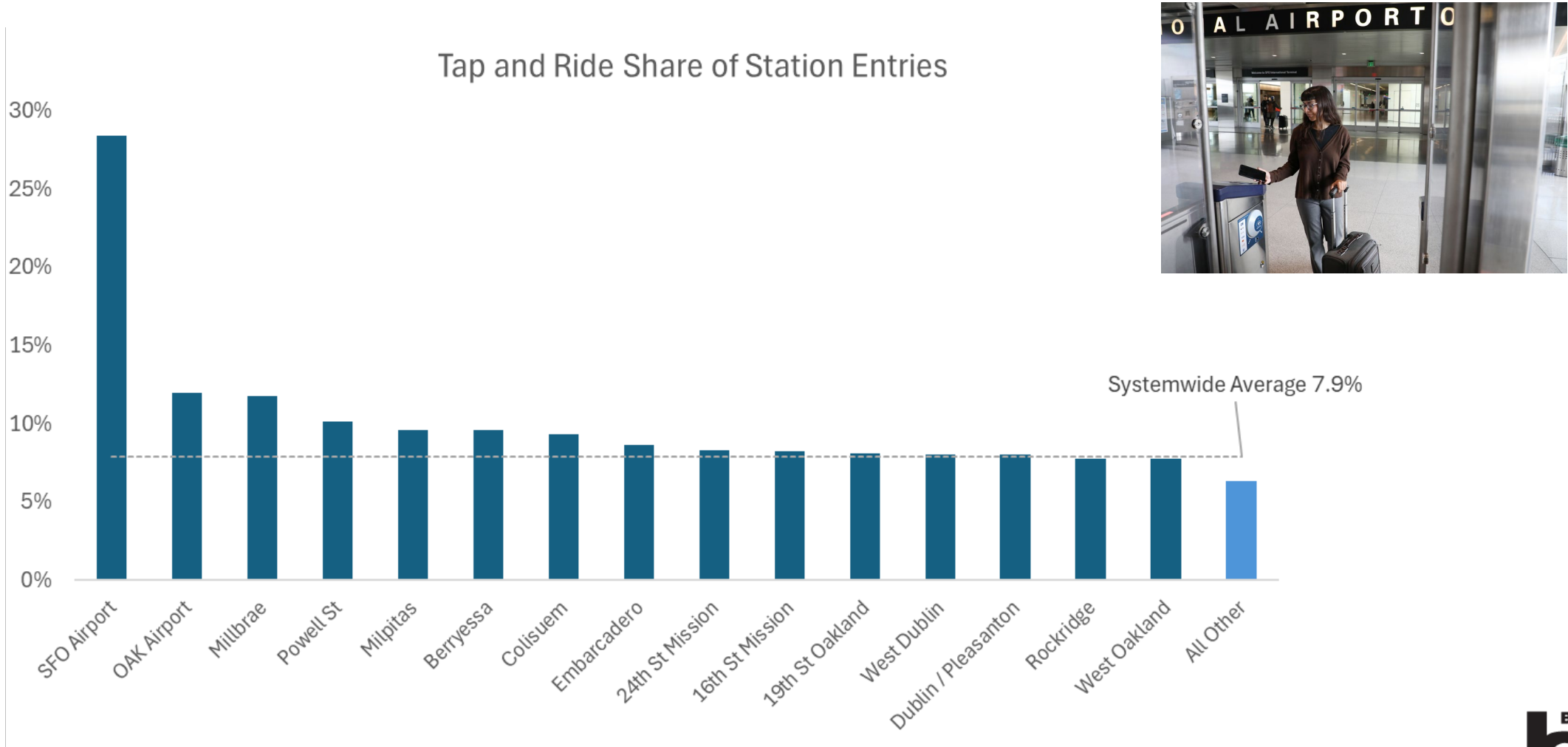
- Clipper Adult is still by far the most common fare category used to pay for BART
- BART introduced Tap and Ride in August
- Clipper Senior is the most common discount fare type
- Clipper BayPass and Clipper START have grown as a share of total trips since 2024

Tap and Ride Launched August 20

- BART was the first Bay Area operator to launch Tap and Ride
- Over the last 5 weeks, Tap and Ride was used for 7.9% of all BART trips
- Tap and Ride share continues to grow, averaging nearly 10% of all trips over the last week
 - Weekend utilization (~12%) is higher than Weekdays (~8%)
 - Large events are correlated with high Tap and Ride



SFO Airport has the highest Tap and Ride share



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

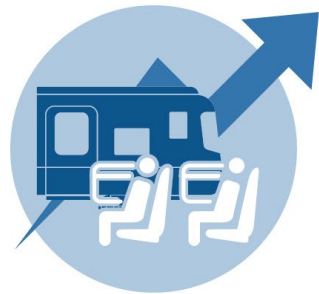
BayPass users have unlimited access to all bus, rail, and ferry services* in the nine-county Bay Area region that accept Clipper, at no cost at the point of use.

*Excludes SFMTA Cable Cars



BayPass Pilot Goals

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

Complete

Phase 2

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

Funded by Payments from Participating Employers/Institutions

2024-2027

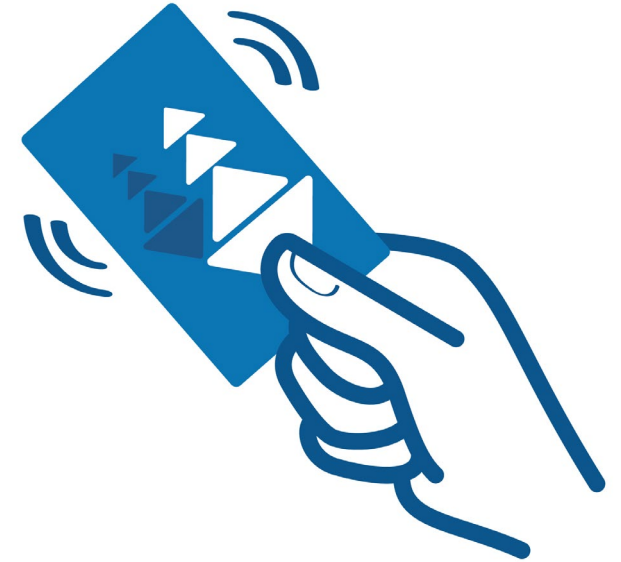
Ongoing

Phase 1 showed that BayPass drives higher ridership



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** on all operators;
 - 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

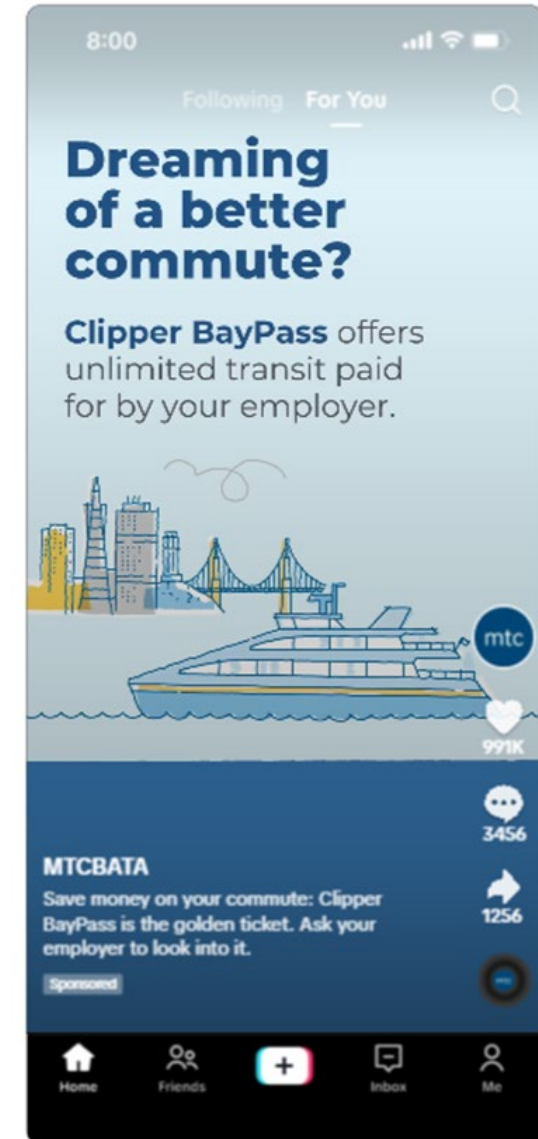


BayPass Phase 2 is underway

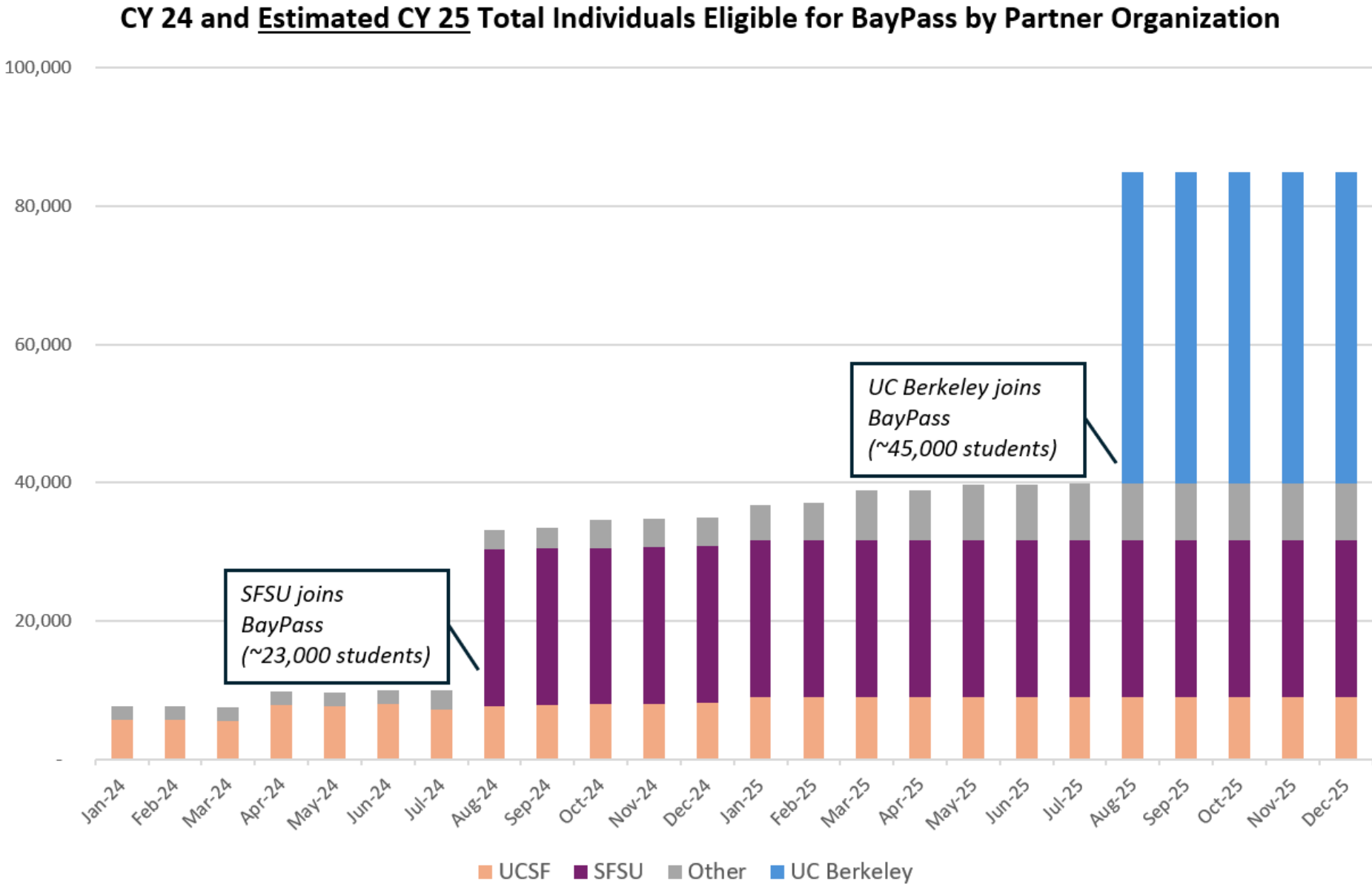


In BayPass Phase 2, we are selling the Clipper BayPass to interested organizations

- 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
 - Preliminary Phase 2 impact findings: 10,000 eligible participants at the first 3 Phase 2 institutions took **35% more transit trips** in 2024 than in 2023



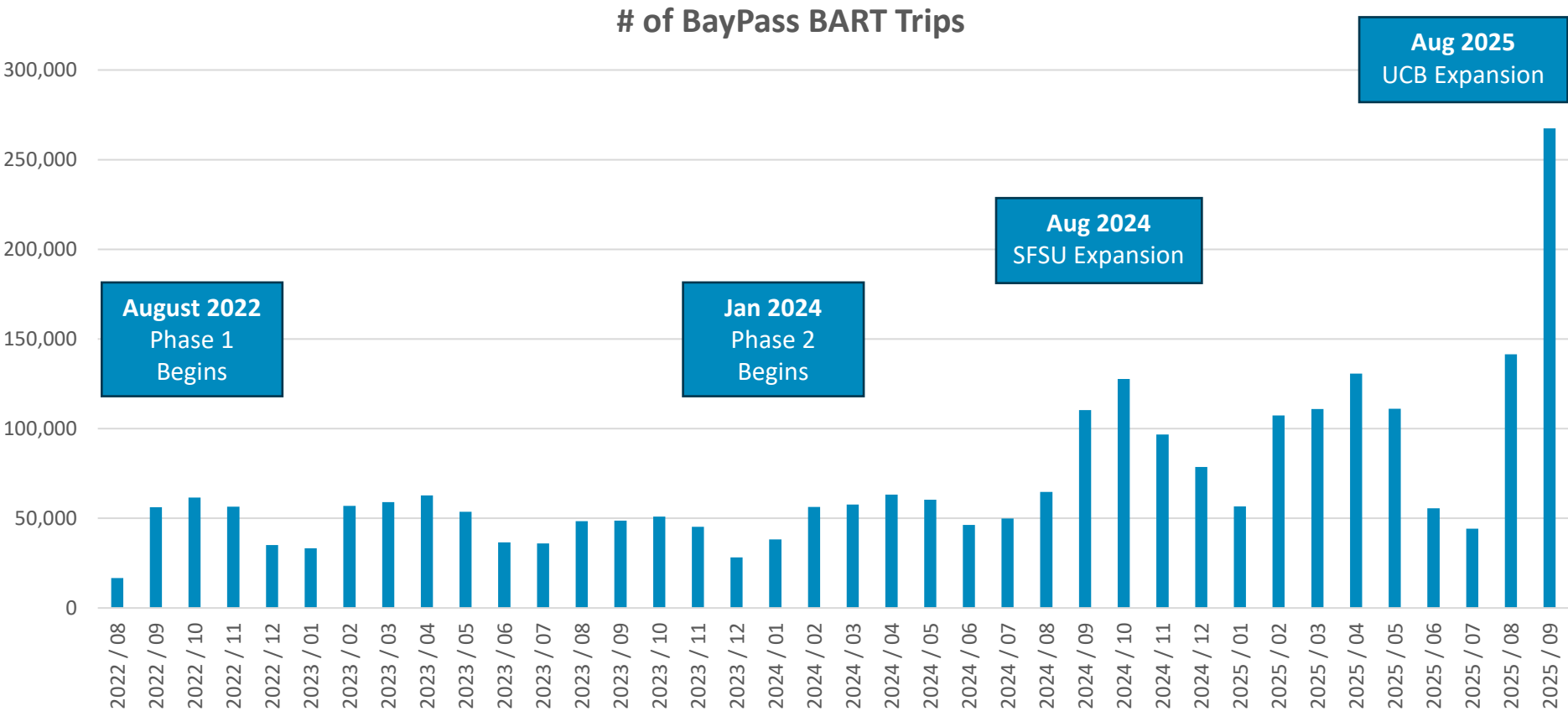
The Phase 2 pilot has grown to over 80,000 paid participants



Phase 2 ridership on BART is growing



In September 2025, there were 9,700 BayPass trips on BART on an average weekday



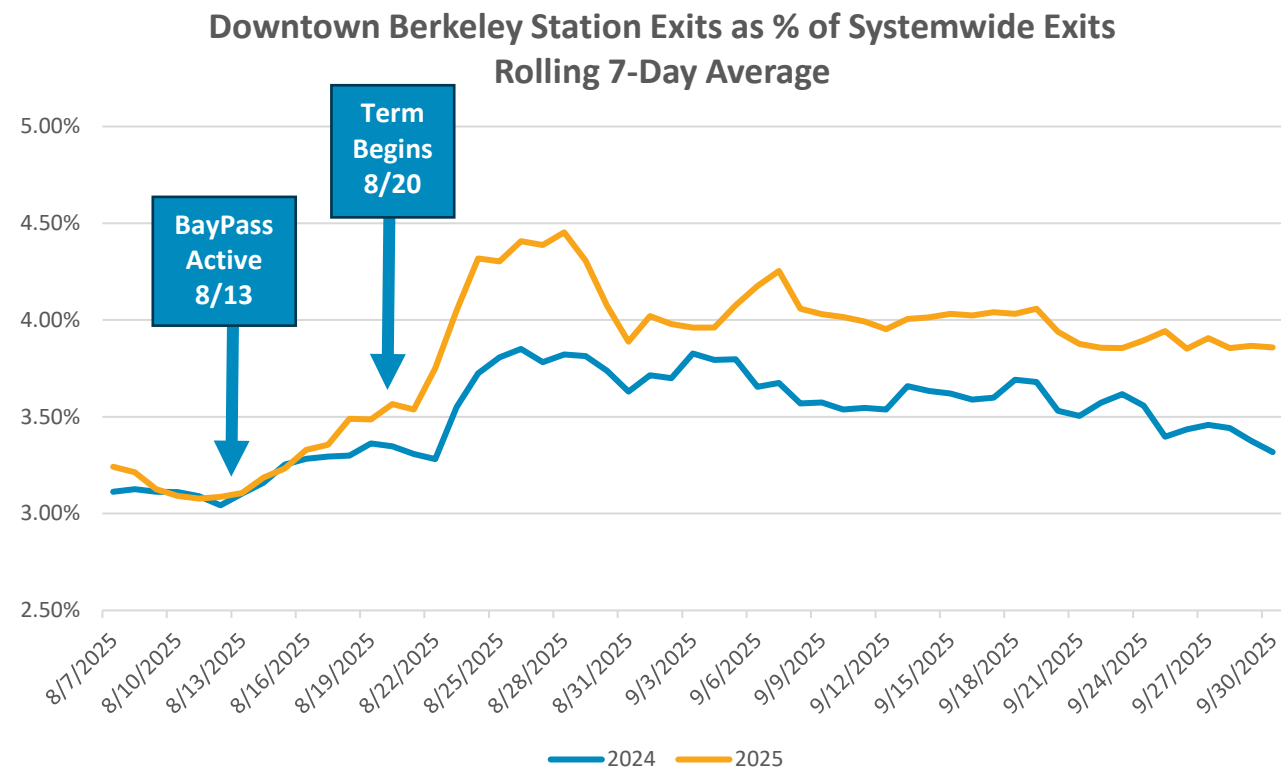
BayPass at UCB has increased ridership at Downtown Berkeley Station



As of August 2025, BayPass is available to all ~45,000 students at UC Berkeley.

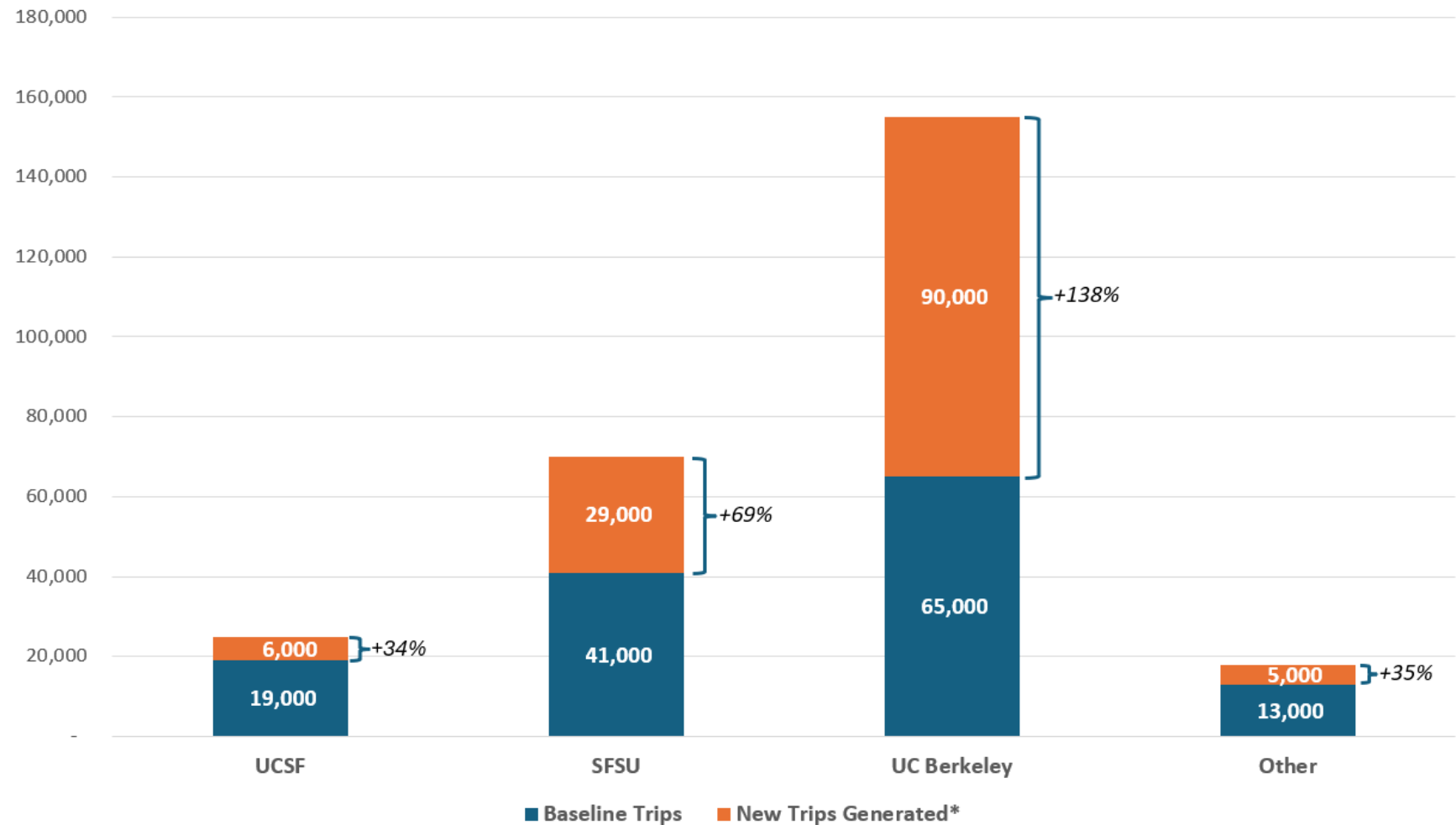
In September 2025, BayPass trips represented 30% of all exits at Downtown Berkeley Station.

Since the start of the semester, ridership growth at Downtown Berkeley station has outpaced systemwide growth



BayPass is generating new trips and revenue for BART

BART Trips Taken in September 2025 by BayPass Holders



In September 2025, riders took 268,000 trips using BayPass

Of these, an estimated 130,000 (or 49%) were new trips generated by BayPass (4,000 – 5,000 trips per day)

Estimated new trips generated by BayPass drove approximately **\$640,000 of additional BART fare revenue** in September alone

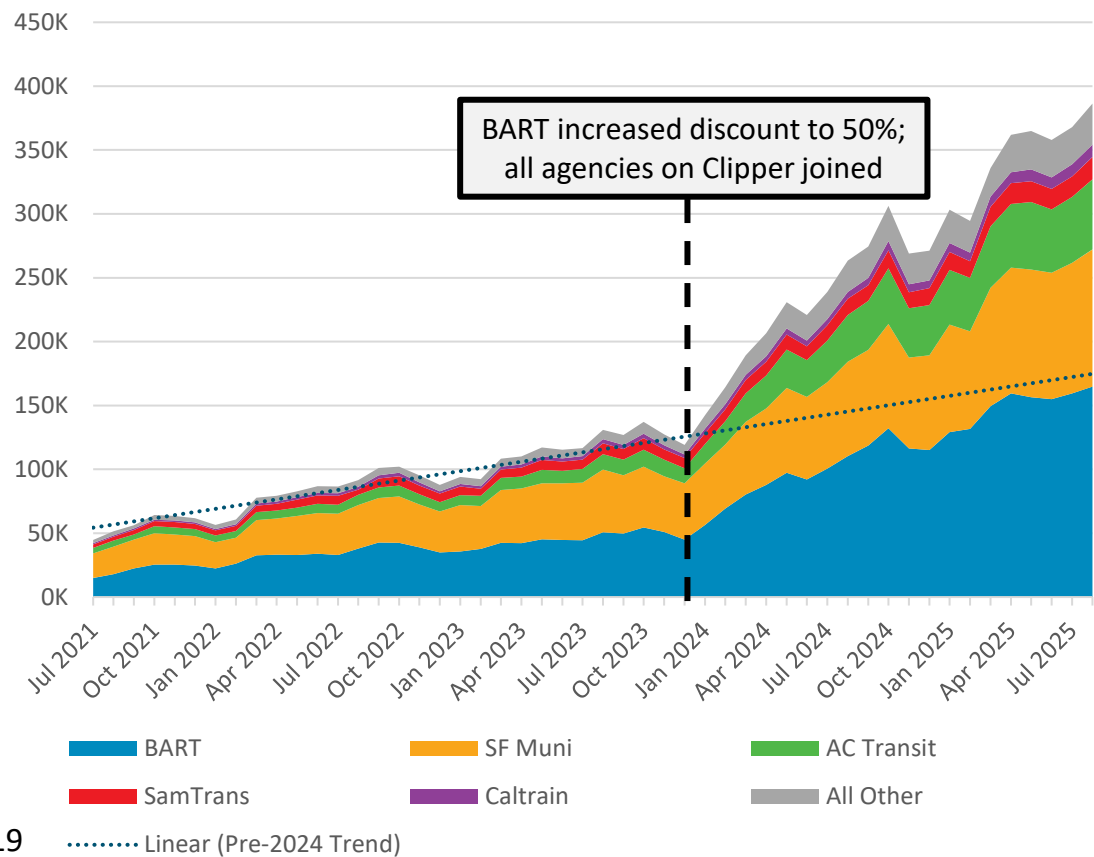
**New Trips Generated estimates are based on results of BayPass Phase 1 evaluation and Phase 2 preliminary evaluation*



Clipper START Ridership has grown rapidly since BART increased our discount to 50%

Clipper START is a regionwide transit fare discount program for riders with lower incomes. Currently the program offers 50% off travel on all agencies that use Clipper.

Clipper START Trips by Agency



- BART has **more Clipper START rides** than any other agency
- **3% of total systemwide exits** in FY25
 - Nearly double FY24 share of total ridership
- Clipper START no longer in pilot phase; converted in May 2025 to **ongoing program**

Top Clipper START Stations FY25	Rank	% of Station Total Exits
Pittsburg Center	1	6%
Balboa Park	2	5%
Bay Fair	3	5%
Lake Merritt	4	4%
Hayward	5	4%

Summary

- **The pace of ridership recovery has picked up in 2025**, with strongest gains on weekends, evenings, and Transbay trips
- **Tap & Ride launched August 2025**: now ~9% of trips, higher on weekends and at SFO
- **Clipper BayPass** is driving new ridership and fare revenue, expanded to 80k+ participants, and has shown strong uptake at UC Berkeley
- **Clipper START** participation continues to grow

Fare programs are boosting ridership as a complement to safe, clean, and reliable service, but broader funding solutions remain essential

Discussion and Questions