



Clipper BayPass **Phase 2 Year 1 Preliminary Evaluation Report**



CLIPPER
BayPass

CONTENTS

01	Summary	3
02	Analysis Takeaways	5
03	Survey Takeaways	9

01

SUMMARY

Purpose

This memo describes takeaways from analyses of Clipper card usage data and surveys conducted at Clipper BayPass partner organizations Alameda TMA, UCSF and City of Menlo Park¹.

UCSF (8,000 eligible individuals), Alameda TMA (2,100 eligible individuals) and City of Menlo Park (200 eligible individuals) began purchasing BayPass in January 2024. All three organizations have renewed their contracts to purchase BayPass through 2025.

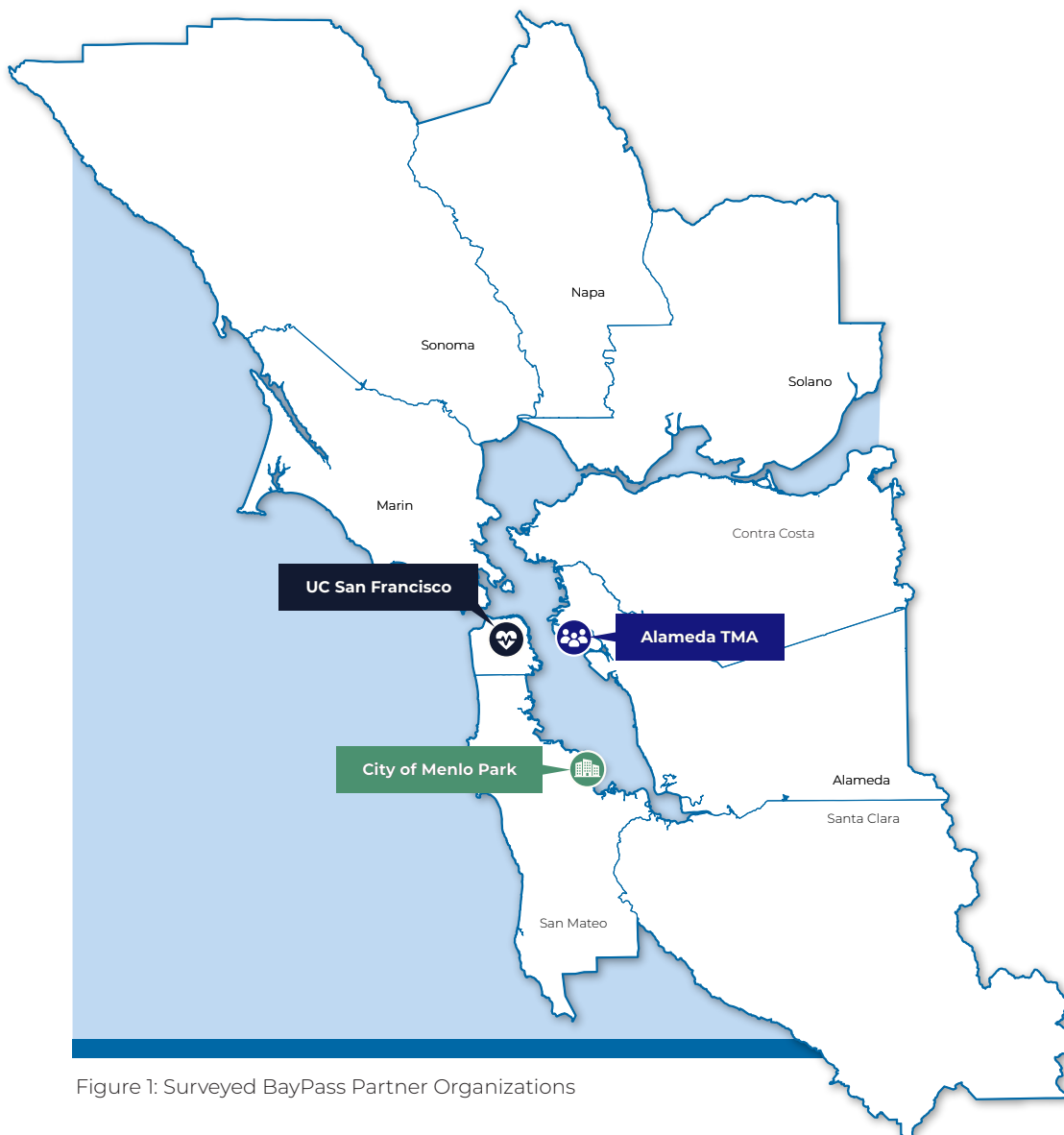


Figure 1: Surveyed BayPass Partner Organizations

Background

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, and about 8x more individuals are currently eligible for BayPass than were eligible at the beginning of 2024.

“BayPass makes my commute to work a lot smoother and eliminates stress about commuting home in traffic.”



02

Analysis Takeaways

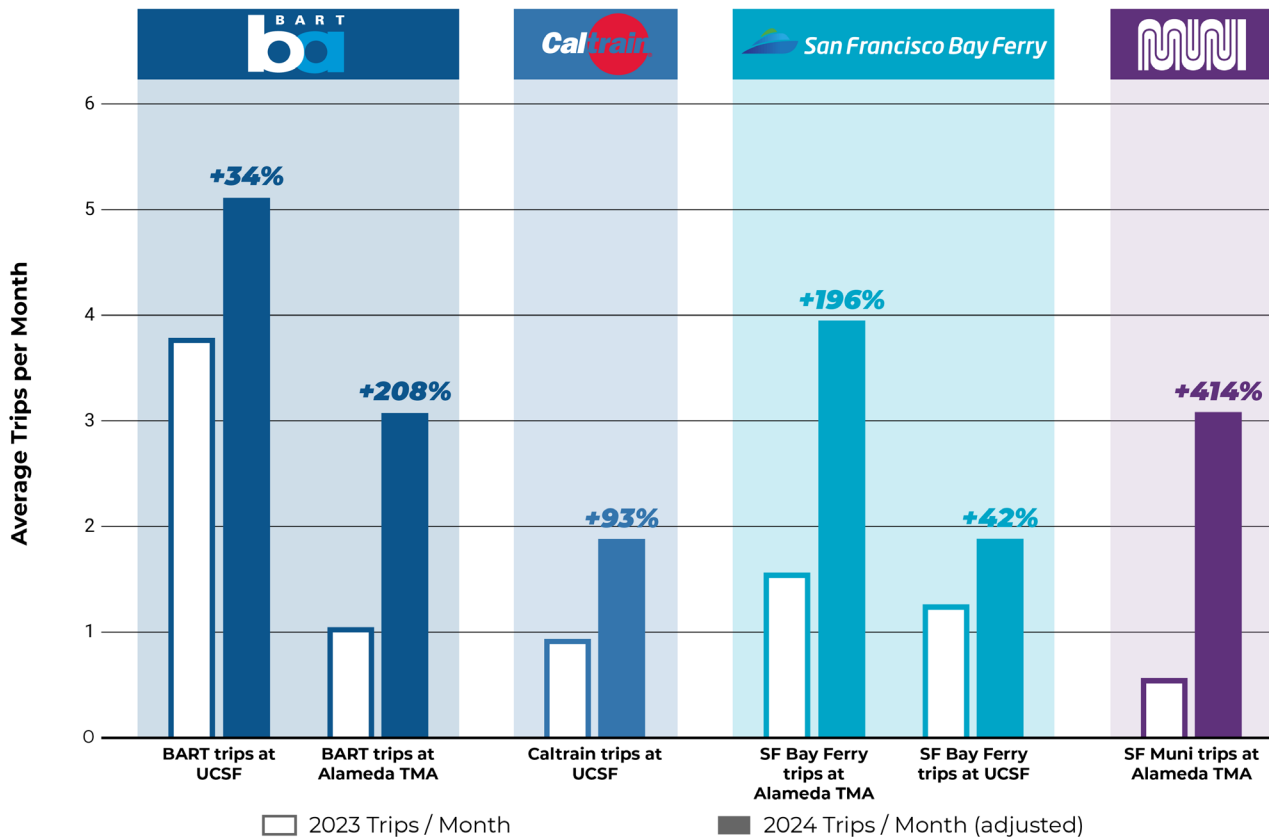


Figure 2: Difference-in-Difference Analysis: Estimating Impact of BayPass on Trips Taken / Month

The table above compares average trips taken per month on Clipper BayPass between July 1, 2024, and December 31, 2024, to the same period in 2023.

This comparison is only carried out for Clipper cards on which at least one trip was taken between July 1, 2023, and December 31, 2023 and during the same period in 2024.

The comparison is also adjusted (using a difference-in-difference technique) for underlying growth by an analysis of a comparison group made up of Clipper cards that were not associated to any particular institution (e.g., university, employer, housing organization) during the same time periods in 2023 and 2024.

Analysis Takeaways ^{2,3,4}

At BART, we observed:

- a **34% increase** in average trips taken per month among UCSF employees and students;
- a **208% increase** in average trips taken per month among Alameda TMA member organization employees and residents.



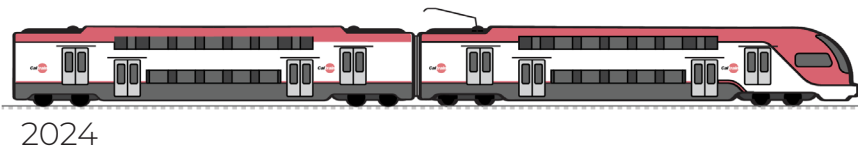
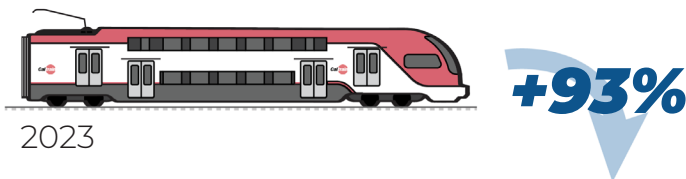
UCSF trips on BART



Alameda TMA trips on BART

At Caltrain, we observed:

- a **93% increase** in average trips taken per month among UCSF employees and students.

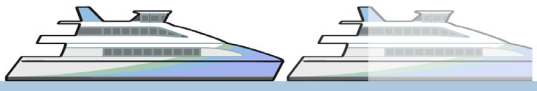


“BayPass is amazing and helps me afford to live in the Bay Area.”

At SF Bay Ferries, we observed:

- a **42% increase** in average trips taken per month among UCSF employees and students.
- a **196% increase** in average trips taken per month among Alameda TMA member organization employees and residents;

+42%



UCSF trips on ferries

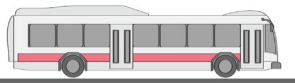
+196%



Alameda TMA trips on ferries

At SF Muni, we observed:

- a **414% increase** in average trips taken per month among Alameda TMA member organization employees and residents.



2023

+414%



2024

We will continue to conduct similar comparative analyses as the number of BayPass partner organizations grows. As of Summer 2025, 16 partner organizations are purchasing BayPass.

03

SURVEY

TAKEAWAYS

Survey Takeaways

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

The following shares of survey respondents indicated that they use transit more for:



Work
(59%)



Healthcare
(62%)



School
(50%)



Recreation
(81%)



Family Obligations
(52%)

“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.”

A 5x increase in the share of survey respondents indicating that public transit was a “very appealing” option for travelling in the Bay Area.

11% of survey respondents indicated that public transit was a “very appealing” option for getting around the Bay Area prior to receiving the BayPass. Among the same group of survey respondents, 56% indicated that public transit was a “very appealing option” since receiving the BayPass.



56% indicated that public transit was a “very appealing option” since receiving BayPass

A 44% increase in the share of survey respondents indicating that they were more likely to stay at their current job within the next year.

44% of survey respondents indicated that they were “somewhat” or “extremely unlikely” to leave their current job within the next year prior to receiving the BayPass. Among the same group of survey respondents, 63% indicated that they were “somewhat” or “extremely unlikely” to leave their current job within the next year since receiving the BayPass.



END NOTES

- 1 | During the second half of 2024, approximately 8,000 individuals were eligible for Clipper BayPass at UCSF, 2,100 at Alameda TMA and 200 at City of Menlo Park.
 - 2 | All observations are statistically significant at $p < .01$.
 - 3 | We were not able to carry out an analysis for SF Muni at UCSF because, during 2023, UCSF had offered a SF Muni pass that was not on Clipper. Therefore, we excluded SF Muni at UCSF from our analysis.
 - 4 | We do not report any observations from City of Menlo Park employees because there were no statistically significant findings from our analysis of their Clipper card usage. This is likely due in part to their relatively small population compared to UCSF and Alameda TMA.
-