



Statewide Fare Guidelines Toolkit





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Fare Guidelines Context

California's public transportation network is made up of hundreds of public transit agencies, each with their own fare policies and products. The California Integrated Travel Project (Cal-ITP) has estimated that there are approximately 200 entities that are publicly funded and provide fixed-route service that is available for the general public to ride without advance reservations across the state. Many of these entities operate within geographic areas where customers rely on multiple transit agencies to travel from their origin to destination. If agencies within a region or across adjacent regions have markedly different fare policies, this presents a challenge to achieving seamless transit usability and accessibility for residents of—and visitors to—the state of California.

The authors of this document recognize that local agencies maintain control over fare policy decisions. Agency fare policies reflect local goals and needs, geographic context, and fare collection technology choices. Fare policy also remains one of the main mechanisms that an agency has to identify new customer markets, increase ridership, and meet financial goals, such as farebox recovery targets.

While acknowledging the need to simplify and coordinate fares across the state while fare policy decision-making remains with transit agencies, this document proposes a series of fare policy guidelines for transit agency consideration and adoption.

The guidelines are not requirements; they are recommendations for agencies looking for opportunities to simplify their fare structures, and they reflect an initial step toward ongoing fare coordination opportunities with nearby transit agencies. Agencies are encouraged to simplify their fare structures and policies at any time, but particularly in advance of, or in conjunction with, changes in fare collection technology.

Fare Policy Components

At a high level, **transit fare policy** establishes principles and goals that guide fare-related decisions for a transit agency. Fare policy may include short-term and long-term goals, and may provide direction on when policies should be reviewed and updated (examples include a major change in policy, new technology implementation, or introduction of a new service). Many fare policies are accompanied by **transit fare strategies** that outline specific actions and decisions that support the identified fare policy principles and goals.

Strategies typically fall into two interrelated categories; **fare strategies** and **collection strategies**. Fare strategies and collection strategies can be approached independently, however, best practice is that they be considered simultaneously given their interdependencies.

For example, a fare strategy may identify a preferred fare product for customers, but only if the collection system has fare media that can support the distribution of the product. The diagram below highlights the components that might be included in fare strategies and collection strategies. This Statewide Fare Guidelines Toolkit focuses on fare strategies.

DIAGRAM A: Components to a Transit Fare Policy



Fare strategies can typically be grouped into six categories:

- 1 Fare Structure** - Framework for how trips are to be priced. Common fare structures include flat, service-based (typically a higher-priced flat fare for longer-distance trips), zone-based, station-to-station pricing (a version of a distance-based structure), and true distance-based pricing.
- 2 Customer Categories** - Sometimes referred to as rider categories, or concession categories, they allow agencies to segment the market and provide targeted pricing/discounts to specific populations. Some customer-category reduced-fare discounts are required to meet federal funding eligibility. Categories may include full fare, senior, person with a disability, Medicare recipient, child, youth, veteran, and active military/personnel in uniform, among others. Some agencies may also include means-based eligible customers (e.g., a low-income fare discount) as a distinct customer category, whereas other agencies manage means-based customers through unique fare programs (discussed below).
- 3 Fare Products** - Different options for accessing a transit system, typically differentiated by the amount of time or number of trips that they allow the customer to travel. Typical fare products include single rides, multi-ride tickets, hourly passes (e.g., a 2-hour pass), day pass, weekly/7-day pass, and monthly/31-day pass. Fare capping—whereby customers pay for individual trips up to a specific value spent or trips taken and are then “capped” and travel for free for the remainder of a specific time period—are typically discussed as a form of fare product.
- 4 Fare Pricing** - The amount paid for a given fare product, providing access to a transit system. Pricing can include the base fare for a single ride or hourly pass, the pricing and bundling increments of multi-day fare products (e.g., a 3-day pass or a 10-ride ticket), and the level of discount offered to specific categories of customers.
- 5 Transfers** - Transfer rules define how customers are allowed to transfer between services within an agency (intra-agency transfer) and between agencies (inter-agency transfer) to complete a trip. Examples of intra-agency transfers include LA Metro bus-to-bus and bus-to-subway transfers. An example of an inter-agency transfer in the Bay area would be a trip beginning on SFMTA light rail and transferring to BART rail. Characteristics of transfers that agencies consider are whether the transfer is paid (and the transfer price) or free, and for what time period or number of boardings a transfer is eligible for.
- 6 Fare Programs** - Specialized fare offerings, often tailored to affiliation-based customer groups, that usually include specific eligibility criteria and enrollment. These often include employer programs, post-secondary educational institution programs, means-based fare programs (e.g., low-income fare program, social service/non-profit provider programs). Zero-fare/free-fare programs may be included in this category.

This toolkit document provides recommendations for each of these six categories of fare strategies. Each toolkit includes recommended/default policies and optional policies that agencies should only consider in specific circumstances. There are a number of fare policies that typically add complexity to the customer experience and/or the fare collection system, and as such, agencies are discouraged from choosing these policies where possible. A summary of major categories of discouraged policies is listed in Table B.

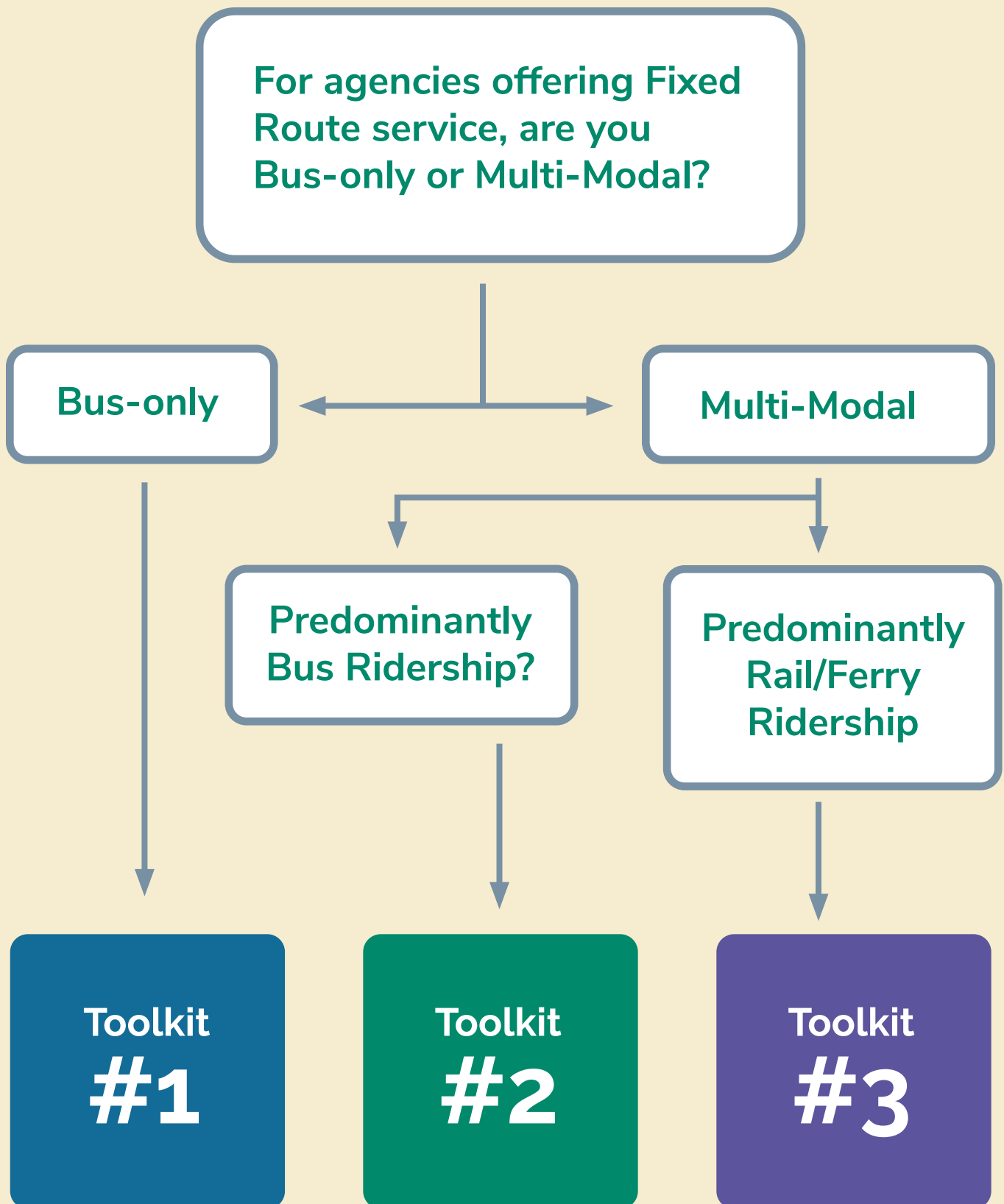
TABLE B: Discouraged Fare Strategies and Policies

Fare Strategy Category	Discouraged Policies	Reasons Discouraged
Fare Structure	<ul style="list-style-type: none"> • Zone-based • Time of day • Yield management 	<ul style="list-style-type: none"> • Adds complexity to the fare collection system (especially with respect to inter-agency regional travel) and increases customer confusion • Introduces inequity, as lower-income customers may not be able to modify travel plans to travel during lower-priced periods or across lower-priced zones
Customer Category	<ul style="list-style-type: none"> • Non-conforming age-based definitions • Height-based definitions for children/youth 	<ul style="list-style-type: none"> • Works against regional, statewide simplification • Places discretion/enforcement decision on operators, which is generally beyond their scope of work • Introduces inequities for tall children/youth
Fare Products	<ul style="list-style-type: none"> • Pre-purchased, time-based passes • Multi-ride tickets/passes 	<ul style="list-style-type: none"> • Raises equity concerns, as these passes require customers to pay the full amount upfront. They reward customers with discounts for upfront payment, rather than loyalty/frequency of travel • Multi-ride tickets are incompatible with some types of electronic fare collection systems • Recommend moving to time-based or ride-based caps where appropriate
Transfers	<ul style="list-style-type: none"> • Route-specific transfers • Direction-specific transfers • Transfers requiring physical proof of travel on a prior agency • Transfers requiring visual validation by vehicle operators 	<ul style="list-style-type: none"> • Increases customer confusion • Increases fare collection system complexity, increasing cost • Works against regional, statewide simplification

Selecting the Appropriate Fare Guidelines Toolkit

Three toolkits have been developed, reflecting the different characteristics of individual agencies: geographic context, modes, and services provided. The decision-tree diagram below can be used to select the most appropriate toolkit for your agency.

**DIAGRAM C: Statewide Fare Guideline
Toolkit Selection Decision Tree**





Bus-Only Agencies

Toolkit #1 provides recommendations to fixed-route, bus-only agencies. In this context, bus-only refers to standard bus, express/commuter/regional/transbay bus, and Bus Rapid Transit (BRT) services. The majority of agencies operating fixed-route service in California will reference Toolkit #1. Agencies that are envisioned to fall into this category range from large, bus-only agencies in urban areas to smaller, municipal, county, rural, and tribal agencies.

Fare Structure

- **Local, flat-fare structure (default)**
- **Service-based structure (additional, at agency discretion)**

Service-based fares are typically higher-priced flat fares for specific services with greater customer benefits (e.g.,: longer distance, limited stop, direct routing, premium destination). These services are often marketed as Express, Commuter, Regional, or Transbay services. Based on prior Cal-ITP analysis, approximately 25% of bus-only agencies offer at least one service/route with a service-based structure. Ideally, a service-based structure is applied to specific routes. Service-based fares may be more appropriate for agencies:

- Classified as Rural Reporters within the National Transit Database (NTD), and/or
- Operating within a service area of approximately 200 square miles or larger, and/or
- Providing longer-distance service(s) connecting a smaller municipality/location to a larger regional center

Customer Categories, Products & Pricing

Within bus-only agencies, a fundamental decision is whether to offer a Single Ride fare (with no transfer privileges within the agency), or to offer a Short-Term Period Product (such as a 2-hour pass, allowing unlimited travel on similarly priced services within the agency). An agency's size, geographic context, and network design will help determine which is most appropriate. Within a multi-agency region, it is preferable to have all agencies choose the same product. The table below provides some context for when each type of product may be more appropriate, but local context and needs will ultimately dictate product choice.



TABLE 1-1: When to Choose a Single Ride vs. Short-Term Period Product

Product	Single Ride	Short-Term Period Product
Validity	Pay for each boarding	Unlimited travel within a 90-minute to 180-minute period
Characteristics	Agency operates in an area where they are the only agency, or operate in a multi-agency area with 1 other agency	Agency operates in a multi-agency area with 2+ other agencies
	Network design, prioritizing point-to-point travel (i.e., few transit hubs/centers, few intersecting routes)	Network design, prioritizing network simplicity and frequency (i.e., more transit hubs/centers, more intersecting routes)

The guidelines make the following customer category, fare product, and pricing recommendations.

TABLE 1-2: Customer Definitions, Fare Products, and Pricing for Flat Fares

Fixed Route	Flat Fares						
	Short Period Products	OR	Single Rides	Daily Cap	Weekly / 7-Day Cap	OR	Monthly Cap
	90- to 180-minute validity (120 minutes recommended)		Single Boarding	Service Day	Mon-Sun, or Rolling 7-Day Period	Calendar Month or Rolling 31-Day Period	
Full Fare - Adult, 19-64	Base Fare			2 - 3 times the Base Fare	8 - 10 times the Base Fare	30 - 36 times the Base Fare	
Reduced Fare - Senior (65+) / Disabled / Medicare - Youth (13-18)*	0.5 times the Base Fare			1.0 - 1.5 times the Base Fare	3 - 5 times the Base Fare	11 - 18 times the Base Fare	
Free - Child (0-12) - Youth (13-18) - Paratransit-eligible (on Fixed Route)	Free						

TABLE 1-3: Customer Definitions, Fare Products, and Pricing for Service-Based Fares

Fixed Route	Service-Based Fares (Additional, Discretionary)					
	Short Period Products	OR	Single Rides	Weekly / 7-Day Cap	OR	Monthly Cap
	90- to 180-minute validity (120 minutes recommended)		Single Boarding	Mon-Sun, or Rolling 7-Day Period		Calendar Month or Rolling 31-Day Period
Full Fare - Adult, 19-64	Service-based Fare			7 - 9 times the Service-based Fare		28 - 32 times the Service-based Fare
Reduced Fare - Senior (65+) / Disabled / Medicare - Youth (13-18)*	0.5 times the Service-based Fare			2.5 - 4.5 times the Service-based Fare		10 - 16 times the Service-based Fare
Free - Child (0-12) - Youth (13-18)* - Paratransit-eligible (on Fixed Route)	Free					

* There is growing interest in Zero Fare programs for Youth customers. Depending on agency preferences, Youth may be charged a Reduced fare or receive free travel.

TABLE 1-4: Customer Definitions, Fare Products and Pricing for Paratransit Fares

Paratransit	Single Ride
	Single Ride, Origin to Destination
Complementary Paratransit Fare - Paratransit-eligible (on Paratransit)	1 - 2 times the Base Fare
Non-ADA Paratransit Fare - Paratransit-eligible (on Paratransit)	2 - 4 times the Base Fare
Free - Personal Care Attendants (on Paratransit)	Free

Transfers

The recommended approach to transfers depends upon whether an agency has selected a Single Ride product or a Short-Term Period product. Table 1-5 summarizes the intra-agency and inter-agency transfer recommendations. In multi-agency

geographies, regardless of the product selected, it is recommended that agencies establish bi-lateral or multi-agency transfer policies and/or regional fare caps, and a bi-lateral or multi-agency revenue sharing agreement.

TABLE 1-5: Intra-Agency and Inter-Agency Transfer Recommendations.

Product	Single Ride	OR	Short-Term Period Product
Intra-Agency Transfers	No intra-agency transfers are provided; customers pay for each boarding		Customers pay for the highest-price leg of a multi-leg, intra-agency trip within the validity period
Inter-Agency Transfers	Customers pay for each boarding on all agencies		Customers pay for the highest-price leg of a multi-leg, inter-agency trip within the validity period
Agency Agreements	Agencies should work toward bi-lateral or multi-agency regional fare caps, and should establish a revenue sharing agreement for when customers reach/exceed the fare caps		Agencies should work toward bi-lateral or multi-agency transfer policies, and should establish a revenue share agreement for when transfer credits are offered

Optional Fare Strategies

Optional fare strategies that bus-only agencies may want to consider include:

- Additional Customer Categories (such as Veteran, Transit Employees) should only be considered if they support a significant customer market or fulfill an operational need.
- Consideration of a Means-Based/Low-Income Customer Category is best approached through discussions with other agency partners across the region, to ensure that all agencies recognize the impacts of offering this discount and work toward consistent eligibility criteria, pricing, etc.
- Third-Party Funded Fare Programs (such as Employer Programs, Post-Secondary Education Institution Programs) should only be considered if they support a significant customer market and if the needs of the customer group cannot be met with other tools.
- Special Fare Products (e.g., weekend pass, family pass, group travel, etc.) should only be considered if they have been validated as supporting a significant customer market, and if the needs of the customer group(s) cannot be met with other tools.



Multi-Modal Agencies with Substantial Bus Network

Toolkit #2 provides recommendations to fixed-route, multi-modal agencies with a sizable portion of their ridership coming from the bus portion of their network. In this context, bus refers to standard bus, commuter/express/transbay bus and Bus Rapid Transit (BRT) services. Agencies using this toolkit likely have a strong bus network with accompanying light rail, streetcar, and/or heavy rail/subway service. Toolkit #2 applies to a relatively small number of large agencies operating in urban areas in California, many of whom have comprehensive fare policies and in-house policy teams.

Fare Structure

- Local, Flat fare structure (default)
- Service-based structure (additional, at agency discretion)

Service-based fares are typically higher priced, flat fares for specific services with greater customer benefits (e.g., longer distance, limited stop, direct routing, premium destination). These services are often marketed as Express, Commuter, Regional, or Transbay services. Ideally, a service-based structure is applied to specific routes.

Customer Categories, Products & Pricing

The guidelines make the following customer category, fare product, and pricing recommendations.



TABLE 2-1: Customer Definitions, Fare Products, and Pricing for Flat Fares

	Service-Based Fares (Additional, Discretionary)				
	Short Period Products	Daily Cap	Weekly / 7-Day Cap	OR	Monthly Cap
Fixed Route	90- to 180-minute validity (120 minutes recommended)	Service Day	Mon-Sun, or Rolling 7-Day Period		Calendar Month or Rolling 31-Day Period
Full Fare - Adult, 19-64	Service-based Fare	2 - 3 times the Base Fare	7 - 9 times the Service-based Fare		28 - 32 times the Service-based Fare
Reduced Fare - Senior (65+) / Disabled / Medicare - Youth (13-18)*	0.5 times the Service-based Fare	1.0 - 1.5 times the Base Fare	2.5 - 4.5 times the Service-based Fare		10 - 16 times the Service-based Fare
Free - Child (0-12) - Youth (13-18)* - Paratransit-eligible (on Fixed Route)	Free				

* There is growing interest in Zero Fare programs for Youth customers. Depending on agency preferences, Youth may be charged a Reduced fare or receive free travel.

TABLE 2-2: Customer Definitions, Fare Products, and Pricing for Service-Based Fares

Fixed Route	Service-Based Fares (Additional, Discretionary)			
	Short Period Products	Weekly / 7-Day Cap	OR	Monthly Cap
	90- to 180-minute validity (120 minutes recommended)	Mon-Sun, or Rolling		Calendar Month or Rolling 31-Day Period
Full Fare - Adult, 19-64	Service-based Fare	7 - 9 times the Service-based Fare		28 - 32 times the Service-based Fare
Reduced Fare - Senior (65+) / Disabled / Medicare - Youth (13-18)*	0.5 times the Service-based Fare	2.5 - 4.5 times the Service-based Fare		10 - 16 times the Service-based Fare
Free - Child (0-12) - Youth (13-18)* - Paratransit-eligible (on Fixed Route)	Free			

* There is growing interest in Zero Fare programs for Youth customers. Depending on agency preferences, Youth may be charged a Reduced fare or receive free travel.

TABLE 2-3: Customer Definitions, Fare Products, and Pricing for Paratransit Fares

Paratransit	Single Ride
	Single Ride, Origin to Destination
Complementary Paratransit Fare - Paratransit-eligible (on Paratransit)	1 - 2 times the Base Fare
Non-ADA Paratransit Fare - Paratransit-eligible (on Paratransit)	2 - 4 times the Base Fare
Free - PCA (on Paratransit)	Free

Transfers

The recommended approach to transfers, both intra-agency and inter-agency, is that customers pay for the highest-price leg of a multi-leg trip within the validity period. Some examples of this recommendation include:

- Transfer from Agency A bus (\$2.50) to Agency A rail (\$2.50) within the transfer period = Total intra-agency fare is \$2.50
- Transfer from Agency A bus (\$2.50) to Agency A commuter bus (\$6.00) within the transfer period = Total intra-agency fare is \$6.00 (value of the highest-priced leg of the trip)

- Transfer from Agency A bus (\$2.50) to Agency B rail (\$7.00) within the transfer period = Total inter-agency fare is \$7.00 (value of the highest-priced leg of the trip)

It is recommended that agencies establish multi-agency transfer policies and/or regional fare caps, and a multi-agency revenue share agreement. Ideally, all agencies operating within a region will adopt consistent transfer policies, regional fare caps, and revenue share agreements.

Optional Fare Strategies

Optional fare strategies that multi-modal agencies may want to consider include:

- Additional Customer Categories (such as Veteran, Transit Employees) should only be considered if they support a significant customer market or fulfill a critical operational need.
- Third-Party Funded Fare Programs (such as Employer Programs, Post-Secondary Education Institution Programs) should only be considered if they support a significant customer market and if the needs of the customer group cannot be met with other tools. Ideally, the program design would allow customers to travel on all agencies within a region, with third-party pricing designed to appropriately compensate participating agencies.
- Depending on agency partnerships, some agencies may opt to offer pre-purchased, short-term products (e.g., time-based short-period product, service-day pass) on low-cost media for social service agencies and/or non-profit organizations. These products are typically purchased by organizations and distributed at no charge/nominal cost to their customers/clients for immediate travel needs. This approach and use of limited-use products is typically offered by agencies in lieu of a means-based/low-income fare program, or to supplement means-based/low-income fare programs with shorter-period products.
- Customer Benefits/Rewards Programs reward customers for frequent travel by earning points that can be redeemed for benefits, free trips. These programs can also be designed to support agencies looking to replace products like multi-ride tickets.
- Special Fare Products (e.g., weekend pass, family pass, group travel, etc.) should only be considered if they have been validated as supporting a significant customer market and if the needs of the customer group(s) cannot be met with other tools.



Multi-Modal Agencies with Substantial Rail/Ferry Network

Toolkit #3 provides recommendations to fixed-route, multi-modal agencies with a sizable portion of their ridership coming from rail and/or ferry modes. Agencies using this toolkit likely operate rail and/or ferry service, and may have accompanying commuter bus service. In some limited cases, agencies operating a network of commuter bus services may find this toolkit helpful. Nearly all agencies using this Toolkit can be described as providing 'regional' or 'inter-regional' service. Toolkit #3 applies to approximately a dozen agencies across the state of California, including State-supported Amtrak routes and thruway services.

Fare Structure

- Station-to-station / point-to-point structure

Station-to-station, or point-to-point fare structures generally have a unique price for each origin-destination pair on a system. These fares typically consist of a fixed fee, which represents the base fare, and a fixed price per mile fee (the mileage fee) that is measured by the distance traveled along the transit service route. The base fare may also have a minimum threshold, ensuring a set fare regardless of travel distance.

Customer Categories, Products & Pricing

The guidelines make the following customer category and pricing recommendations.



TABLE 3-1: Customer Definitions and Pricing for Agencies Statewide

Customer Categories	Pricing
Full Fare - Adult 19-54	Full Fare
Reduced Fare - Senior (65+) / Disabled / Medicare, Youth (13-18)*, Means-based	Reduced Fare (50% Discount)
Free - Child (0-12), Youth (13-18)*, Paratransit-eligible (on Fixed Route), PCA (on Paratransit)	Free
Complementary Paratransit Fare - Paratransit-eligible (on Paratransit)	Paratransit Fare

* There is growing interest in Zero Fare programs for Youth customers. Depending on agency preferences, Youth may be charged a Reduced fare or receive free travel.

Fare Products

For ‘regional’ and ‘inter-regional’ agencies providing predominantly rail, ferry, and/or commuter bus services, the recommendation is that the default product that agencies offer be a Single Ride fare that provides travel from origin to destination, without transfers. Transfers should not be confused with internal interchanges (typically crossing a rail platform) which facilitate travel from origin to destination and should be allowed. For example, BART allows customers to cross the platform at Pittsburgh/Bay Point Station

to change trains and continue from their origin to destination. Similarly, a customer traveling from Baldwin Park to Irvine on Metrolink rail will take a train from Baldwin Park to LA Union, interchange at LA Union and travel south to Irvine but will pay the applicable fare from Baldwin Park to Irvine.

Exact pricing for each service will be dependent upon fare structure, network size, and customer transfer behavior.

TABLE 3-2: Fare Product Recommendations for “Regional” and “Inter-Regional” Agencies

Product	Validity	Pricing
Single Ride Product	Single ride, from Origin to Destination	Point-to-point, dependent upon the base fare and the distance traveled along the transit service route between the origin-destination pairs
Weekly / 7-Day Cap	Mon-Sun, or Rolling	Capping is applied after a specified number of rides, regardless of the total fare value accumulated.
Monthly Cap	Calendar Month	Capping is applied after a specified number of rides, regardless of the total fare value accumulated.

Transfers

For “Regional” / “Inter-Regional” agencies using Toolkit #3, the recommendation for intra-agency transfers is that a single ride fare allows a customer to travel from their origin to destination. This may or may not require an interchange within the agency network, but should not allow customers to exit the system and re-enter on the same fare.

For inter-agency transfers, the recommended approach is that customers pay for the highest price leg of a multi-leg trip within a maximum regional trip time limit. The maximum regional trip time limit ensures that multi-agency travel credits are not provided for excessively lengthy trips. An example of this recommendation is listed here:

- Agency A is a “regional” agency providing rail service using a station-to-station fare structure. Agency B is an “inter-regional” agency providing rail service using a station-to-station fare structure. Both agencies have agreed that a reasonable

maximum regional trip time limit to complete travel is 3-hours. A customer beginning on Agency A travels 2 stations and pays \$4.50. The customer transfers to Agency B and travels a further 6 stations. The customer completes the trip in under 3 hours. The posted price of the trip on Agency B in isolation is \$13.50. According to the recommended transfer policy, the customer would pay an additional \$9.00 for travel on Agency B. The customer’s total fare is \$13.50, equal to the value of the highest priced leg of the multi-agency trip. If the customer had taken more than 3 hours to complete the trip, they would have paid both fares, totaling \$18.00.

It is recommended that agencies establish multi-agency transfer policies and/or regional fare caps, and a multi-agency revenue share agreement. Ideally, all agencies operating within a region will adopt consistent transfer policies, regional fare caps and revenue share agreements.



Optional Fare Strategies

Optional fare strategies that multi-modal agencies may want to consider include:

- Additional Customer Categories (such as Veteran, Transit Employees) should only be considered if they support a significant customer market or fulfill a critical operational need.
- Third-Party Funded Fare Programs (such as Employer Programs, Post-Secondary Education Institution Programs) should only be considered if they support a significant customer market, and the needs of the customer group cannot be met with other tools. Ideally, the program design would allow customers to travel on all agencies within a region, with third-party pricing designed to appropriately compensate participating agencies.
- Depending on agency partnerships, some agencies may opt to offer pre-purchased, short-term products (e.g., single ride, service-day pass) on low-cost media for social service agencies and/or non-profit organizations. These products are typically purchased by organizations and distributed at no charge/nominal cost to their customers/clients for immediate travel needs. This approach and use of limited-use products is typically offered by agencies in lieu of a means-based/low-income fare program, or to supplement means-based/low-income fare programs with shorter-period products.
- Customer Benefits/Rewards Programs reward customers for frequent travel by earning points that can be redeemed for benefits, free trips. These programs can also be designed to support agencies looking to replace products like multi-ride tickets.
- Special Fare Products (e.g., weekend pass, family pass, group travel, etc.) should only be considered if they have been validated as supporting a significant customer market, and the needs of the customer group(s) cannot be met with other tools.



Questions or comments?

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