

# 2012 MBTA Fare Policy

## I. Purpose

The purpose of this Fare Policy is to establish guidelines for setting or restructuring MBTA fares. MBTA staff and the Board of Directors will look to this policy when they make decisions about adjusting fares. All such decisions will also be made in accordance with the MBTA's enabling legislation (MGL c. 161A), specifically § 5(r), which directs the MBTA to adopt a fare policy that addresses the following:

- A fare structure, including fare media and passes<sup>1</sup>
- Fare levels, including discounts
- A system for free or substantially price-reduced transfer privileges
- Fare equity.

## II. Fare Policy Goal

The goal of this Fare Policy is to support the MBTA's mission of providing high-quality public transportation services for the benefit of the individuals and communities that it serves.

### ***Fare Policy Objectives***

The MBTA, in consultation with the Rider Oversight Committee, has developed six Fare Policy Objectives that are critical to achieving the Fare Policy Goal. The nature of these objectives reflects the complexity of developing a Fare Structure that will balance the desire to keep fares affordable for MBTA customers with the need to maximize fare revenue to help maintain and expand transit operations. These objectives were used to develop the Fare Structure described later in the policy.

In the future, when changes to the Fare Structure are considered, strategies for meeting the six objectives will be developed and evaluated. The new Fare Structure that emerges will encompass the mix of strategies that are determined to best meet the Fare Policy Objectives, as described below, in the context of the conditions and needs at that time.

### **1. Customer- and Community-Related Objectives**

The following three objectives directly support the MBTA's mission of operating high-quality public transportation services. When a fare increase or restructuring is proposed, all fare strategies considered for achieving these three objectives should be carefully weighed in relation to each other, as some possible strategies may achieve one objective at the expense of another. The MBTA must strive to meet all of these objectives.

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<sup>1</sup> For the purposes of this policy, "fare structure" encompasses all four of the fare requirements found in MGL, c. 161A § 5(r).

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### *a. Increase Ridership Utilization and Occupancy*

Because the MBTA exists to provide transit services for the benefit of the public, the degree to which the Authority increases ridership is a direct indication of how successfully the MBTA is achieving its mission. Increasing ridership also supports the important societal goals of reducing traffic congestion and decreasing air pollution. However, when an increase in ridership creates the need to add service, the resulting additional fare revenue is offset by new operating costs. It is therefore important to adopt fare strategies that will increase ridership on services that have underutilized passenger capacity. It is also important to adopt fare strategies that will increase ridership by making MBTA services more attractive and convenient to use.

### *b. Establish Equitable Fares*

To be equitable, fares must take into account the needs of various populations of users and types of services. The Fare Structure should, therefore, support the travel patterns and requirements of transit riders throughout the service area and should reflect the level and quality of the service provided. In addition, the MBTA recognizes the need to ensure that for any fare increase, the burden placed on environmental justice communities is not unjustifiably and disproportionately greater than that borne by the system as a whole.

### *c. Enhance Mobility and Access*

The Fare Structure should enhance the ability of riders to access the system and move through it with ease. To do so, the Fare Structure should be easy to understand and should promote a unified system by simplifying fares across modes.

## **2. Financial and Privacy Objectives**

All fare strategies that are seriously considered in the context of the three Customer and Community Objectives discussed above must also meet the following three Financial and Privacy Objectives to ensure the continued operation of MBTA services and the right to privacy of the Authority's customers.

### *a. Maintain or Increase Fare Revenue Stream*

Because fare revenue is a critical component of the MBTA's operating budget, any increase to, or restructuring of, fares should ensure that the total fare revenue stream is maintained at an appropriate level, consistent with requirements of the MBTA's enabling legislation, MGL c. 161A.

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### *b. Maximize Fare Revenue Collection*

To maximize fare revenue collection, the MBTA should take advantage of substantial developments in fare collection technologies.

### *c. Respect Customer Privacy*

As the MBTA strives to implement fare collection technologies that are easy and convenient to use, the Authority must remain cognizant of the need to respect customers' privacy and to ensure the security of personal information.

## III. Fare Structure

Using the Fare Policy Objectives described above, the MBTA identified fare strategies for developing the following Fare Structure that meets the four fare policy requirements found in § 5(r) of the Authority's enabling legislation.

### **A. Fare Media and Passes**

1. The following fare media will be available for use on the MBTA system:
  - a. The CharlieCard (a smart card with a computer chip) that can be programmed to hold stored value (to pay for rides individually), a pass (that allows multiple rides within a specified duration of time), or both at the same time.
  - b. The CharlieTicket (a ticket with a magnetic strip) that can be programmed to hold stored value OR a pass. The MBTA may consider plans to phase out use of the CharlieTicket wherever possible.
  - c. Cash will be accepted at bus fare boxes and at fare vending machines in stations and at other locations. Credit and debit cards will also be accepted at many fare vending machines. Tokens will not be valid for use anywhere on the system.
2. Passes will be available for the following durations and modes:
  - a. Monthly passes for local bus, local bus/rapid transit combination, inner express bus, outer express bus, ferry, and commuter rail (both Zone and InterZone passes).
  - b. A monthly pass for one mode or zone will be accepted on any other mode with a lower or equal fare.
  - c. One-day and seven-day passes for local bus, rapid transit, inner harbor ferry, and commuter rail Zone 1A.
  - d. Student-only five- and seven-day passes for local bus, rapid transit, inner express bus, outer express bus, and commuter rail Zones 1A through 2. The five-day pass is for weekday use only, and the five- and seven-day passes are available only on a Student CharlieCard or CharlieTicket.

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- e. A monthly pass for seniors and persons with disabilities for local bus and rapid transit (only on a Senior/TAP CharlieCard).
3. The following multi-ride tickets will be available (all multi-ride tickets will be valid for only 30 days):
    - a. Adult multi-ride CharlieTickets—for use only on commuter rail and ferries—offer 10 rides, but no multi-ride discount will be available (the 10-ride ticket is equivalent to the price of 10 single-ride fares). These are for use only on commuter rail and ferries.
    - b. Half-fare multi-ride CharlieTickets for seniors, students, and persons with disabilities—for use only on commuter rail and ferries—offer 10 rides, but no multi-ride discount will be available (the 10-ride ticket is equivalent to the price of 10 single-ride half-price fares).

### **B. Fare Levels**

1. Fares may be differentiated by mode to reflect differences in operational characteristics and average trip length. By mode, fares will be either flat or zoned.
  - a. One flat fare will be charged for any trip on any local bus route.<sup>2</sup>
  - b. One flat fare will be charged for any trip on the rapid transit system, regardless of the distance or direction traveled.<sup>3</sup>
  - c. Ferry services may have more than one fare zone; the fares may vary by route. (All single-ride ferry tickets will be valid for 14 days.)
  - d. Express bus service may have more than one fare zone; the fare for local service on express bus routes (for those routes that allow local travel) will be the local bus fare.
  - e. Commuter rail will have multiple fare zones, based on the distance traveled, as well as InterZone fares, based on the number of zones traveled. (All single-ride commuter rail tickets will be valid for 14 days.)
  - f. Fares may be charged on bus replacement services for rapid transit, depending on operational considerations.
2. “Full fare” for all modes will be defined as the adult single-ride cash or CharlieTicket fare. Customers using CharlieCards (where available) will pay a discounted fare. This is intended to encourage use of the CharlieCard, which facilitates easy access to rapid transit stations, faster boarding on buses, and shorter dwell times at bus stops.

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<sup>2</sup> Includes Silver Line Washington Street Bus Rapid Transit.

<sup>3</sup> Includes all stops on the Red Line, Green Line, Orange Line, Blue Line, Mattapan High-Speed Line, and Silver Line Waterfront.

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3. On all fixed-route modes, fares for students, seniors (age 65 or older), persons with disabilities, and Medicare cardholders will not exceed one-half the adult “full fare” paid by single-ride cash or CharlieTicket users.<sup>4</sup>
4. Customers using THE RIDE paratransit services will pay no more than twice the local-bus, single-ride, cash, or CharlieTicket fare for trips that meet the Americans with Disabilities Act (ADA) complementary paratransit service requirements: service must be provided within 0.75 miles of a local bus route or rapid transit station and at the same hours and days as the fixed-route service. However, a premium fare will be charged for trips on which either the origin or destination is not within the ADA-mandated service area, for trips that begin or end outside of the ADA-mandated service hours, and for same-day and “will-call” trips<sup>5</sup> (which are outside the scope of the ADA).
5. Persons with a valid Massachusetts Commission for the Blind ID card will ride for free on fixed-route services.<sup>6</sup>
6. Children 11 years of age and under ride for free when accompanied by an adult with a limit of two children per adult.
7. A lower fare will be charged for all commuter rail tickets that are purchased off-board (in stations or other retail locations) during both peak and off-peak hours. This fare will equal the price of the single-ride zoned ticket (purchased on board the train) minus \$3.00.

### ***C. Transfer Privileges***

1. Discounted transfers will be structured so that customers who use stored value on CharlieCards and who transfer between two modes will be charged only for the cost of the higher-priced of the two modes. The transfer price will equal the difference in price between the two modes (the “step-up” price).
2. Because the discounted intermodal transfer privilege will be limited to CharlieCard users, it will be available between two modes only when an automated fare collection technology has been installed on both modes.
3. Certain transfers for customers who use stored value on CharlieTickets will also be discounted, including:
  - a. Free transfer for local bus to local bus

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<sup>4</sup> The student discount is available only to students age 12 through high school.

<sup>5</sup> “Will-call” trips are ones for which the day of the trip is scheduled in advance, but the exact pick-up time is not specified until the day on which the trip is made.

<sup>6</sup> MGL c. 159, § 15 allows common carriers to provide free service to certain classes of passengers, including blind persons identified by a certification of registration from the Commission for the Blind.

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- b. Free transfer between the Mattapan High-Speed Line and the Red Line at Ashmont Station
  - c. “Step-up” transfer for Silver Line Washington Street to rapid transit
  - d. Free transfer for rapid transit to Silver Line Washington Street
4. All transfers must occur within a two-hour window (that is, for any given trip on which a transfer is made, the second vehicle must be boarded within two hours of the time the first vehicle was boarded).

### ***D. Fare Equity***

1. To enhance fare equity, the MBTA uses a simplified “flat-fare-by-mode” system, which reflects a “value-pricing” instead of “distance-pricing” approach. “Value-pricing” recognizes that customers value the core bus and rapid transit system in terms of whether it gets them to their destination safely and efficiently—not in terms of the distance they travel or connections they make.
2. Allowing customers to transfer between modes while only paying for the higher-priced of the two modes also reflects “value-pricing.” This approach benefits customers in urban communities who do not have direct rapid transit service, and who would otherwise pay two separate fares for their trip downtown—one for the bus and one for the subway.

## **IV. Glossary**

Within the context of this policy, the following definitions apply:

**Commuter rail:** Passenger rail service that operates between North or South stations in Boston and the middle and outer suburbs.

**Express bus route:** A bus route providing a limited number of peak-direction trips during peak periods. A large part of any express route is characterized by high-speed, non-stop operation, and a limited number of stops are provided only near route termini. Some restrictions on drop-offs and pickups may apply.

**Local bus route:** Any bus or trackless trolley route or portion of a bus or trackless trolley route not designated as an express bus route is considered a local bus route.

**Mode:** Any type of transit service provided by the MBTA, such as local bus, express bus, rapid transit, commuter rail, ferry, and paratransit.

**Rapid transit:** Includes the Green Line, Red Line, Orange Line, Blue Line, and Silver Line Waterfront Bus Rapid Transit.

**Senior:** Any person age 65 or older.

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**Student:** The MBTA’s enabling legislation (MGL c. 161A, § 5(e)), defines students as “. . . pupils of public day or evening schools, pupils of private day schools or private evening schools or industrial day or evening schools giving substantially the same character and grade of instruction as the schools conducted at public expense and of a not higher grade than a high school . . .” For the purposes of this policy, a student is any pupil, age 12 through high school.