

Receive Update on the Status of Next Generation Clipper Rollout

**JPB TOPS Committee
May 28, 2025**



Agenda

- Project Background
- Key New Features
- Major Challenges
- Mitigation Plan
- Transition Customer Communications Strategy
- Q & A

Background

- **What is Next Generation Clipper?**
 - A shift from a card-based system to a modern account-based system
 - Replacement of existing Clipper hardware with new account-based devices
 - Upgrade from Crystal Reports to a modern datastore and reporting system
 - Migration of the system's backend infrastructure to support account-based functionality
 - Customer transition timeline
 - Starting in late July
 - Discount fare groups (e.g. Youth, Senior, RTC and Clipper START) will transition first
 - Adult full-fare riders will follow, with approximately 150,000 users transitioning per day

Key New Features - Regional

- **Open Payment**

- Riders can pay with contactless bank cards (Visa, Mastercard, American Express, Discover), as well as bank cards in mobile wallets (Apple Pay and Google Pay).

- **Regional Inter-agency Transfer Discounts**

- Riders pay full fare on the first agency's ride and any transfers to another agency within two hours of the initial boarding are discounted, up to a maximum of \$2.85 per transfer.

Key New Features - Caltrain

- **Caltrain New Monthly Pass**

- Fares are based on the number of zones traveled.
- Riders must tap on and off for every trip.
- If a rider travels beyond the zones covered by their monthly pass, an automatic zone upgrade charge will apply.
- If a rider misses a tap-off, the system will apply a maximum zone upgrade fee.
- The Youth Monthly Pass is available for a flat fare of \$24, valid across all zones.

- **Improved Clipper START Discounts**

- Clipper START riders now have access to a discounted monthly pass.



Challenges & Mitigation Plans

- **Fare Enforcement Device Limitations**

- The device's battery cannot last an entire shift, requiring mid-shift charging.
- The device requires an extra click after each validation, slowing down the process when checking multiple customers.
 - ❖ Caltrain Operations is working with MTC and Cubic to seek alternatives, but no resolutions are finalized yet.

- **Card Balance Check**

- Card balance will no longer appear on Clipper validators.
 - ❖ Communicate the change to customers.
 - ❖ Customers can check balance via the Clipper mobile app, Clipper website, at Caltrain TVMs, or by calling Clipper customer service center.

Challenges & Mitigation Plans – cont.

- **Caltrain Monthly Pass Adjustments**

- Dual system complexity.
 - ❖ Prioritize Caltrain monthly pass user's transition
- Significant tapping procedure change.
 - ❖ Maintain current tapping rules during transition (Temporarily)
- Missing a tap-on could result in a citation; missing a tap-off will result in a maximum zone upgrade charge.
 - ❖ Suspend fare enforcement (Temporarily)
 - ❖ Proactive refunds for zone upgrade charges (Temporarily)
- Youth Monthly Pass is priced differently in the old and new systems.
 - ❖ Youth monthly pass fare adjustment

Transition Communications Strategy

- **Minimize Rider Confusion**

- Proactively address the new features of Next Generation Clipper.

- **Maintain Customer Trust**

- Show riders that Caltrain is prepared for the transition by rolling out timely communications highlighting benefits and mitigating perceived risks.

- **Drive Early Adoption & Familiarity**

- Encourage customers to upgrade, download the Clipper mobile app, and learn the new system's benefits.

- **Prepare Internal Teams & Partners**

- Provide frontline staff with training.



Transition Communications Strategy

Phased Approach: Tactics for Pre-Launch

- **Digital ‘Coming Soon’ Banner**
 - Add a high-impact banner on the Caltrain homepage that directs to the clipper landing pages.
 - Key message: “Next Generation Clipper starts rolling out soon—learn about the new benefits and what to expect.”
- **Staff Talking Points & ‘Fast Facts’ Cards**
- **Proactive Social Posts**
 - Weekly countdown posts highlighting a single new feature at a time.

Transition Communications Strategy

Phased Approach: Tactics for Soft Launch

- **Station / Onboard Ambassadors**
 - Station pop-ups during peak commute hours.
 - Distribute small flyers or “take-ones” with very direct bullet points.
- **Maintain a “Focused FAQ”**
 - Pin or highlight a dynamic FAQ on social media and website that addresses issues as they arise, directs to Clipper Customer Support.
- **VMS & Conductor Announcements**
 - Start messaging monthly pass users about the new tapping rules before the hard launch to reinforce correct tap behavior.
 - “Remember to tap on and tap off for every ride.
 - The new Clipper system requires a complete tap sequence.”



Transition Communications Strategy

Phased Approach: Tactics for Hard Launch

- **“Everything is Live” Media Blitz**
 - Press release featuring direct quotes from Caltrain leadership about how this improves convenience.
- **Collateral Rollout**
 - Replace “Coming Soon” banners on website.
 - Larger station and onboard signage featuring Clipper customer service line.
- **Social Media “How To” Videos**
 - Short 15-30 second videos walking riders through the new monthly pass flow.
 - Q&A sessions to answer rider questions as they experience the system in day-one conditions.

Transition Communications Strategy

Customer Support

- Banner alert on Caltrain homepage
- Updated [Caltrain.com/Clipper](https://caltrain.com/Clipper) page with FAQ (summer 2025).
- Physical assets (e.g., signage, banners, etc.) will direct customers experiencing issues primarily to the Clipper customer service line at 877-878-8883.
- Caltrain CSC will be a secondary resource, with agents trained on FAQs.

Questions

FOR MORE INFORMATION

WWW.CALTRAIN.COM

