



Caltrain Market Segmentation Research

Dec. 2018 – Apr. 2019

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Caltrain Rider/Non-Rider Research Overview

- ▶ This report includes findings from three research projects:
 - Focus groups with Caltrain riders and non-riders: December 2018
 - Survey of Caltrain riders: February – March 2019
 - Survey of Santa Clara, San Mateo, and San Francisco County residents who do not ride Caltrain: February – April 2019
- ▶ Findings from the focus groups were used to develop the research instruments for the surveys, in order to quantify attitudes and behaviors discussed in the focus groups and to further investigate themes of interest
- ▶ Research topics included: current use of Caltrain, drivers of Caltrain usage, barriers to riding Caltrain, aspects of the Caltrain customer experience, and desired improvements to Caltrain

Executive Summary of Research – Riders

- ▶ Caltrain riders have a high opinion of the system (86% favorable rating)
 - Caltrain receives high ratings from riders on safety, having stations that are easy to navigate, being easy to understand, and cleanliness
 - Caltrain receives lower ratings from riders on frequency of service
- ▶ A majority of riders ride frequently (65%) and during peak hours (66%)
 - Three-quarters (78%) report taking Caltrain to a special event at least occasionally
 - A significant minority (16%) report usually using a bike in their commute to their home station
- ▶ Riders want more frequent service, and say they would be more satisfied with the system if it offered this, particularly during peak weekday times and weekends

- ▶ Among local residents who do not ride Caltrain, the system's brand rating is fairly strong (61% favorable rating)
 - Non-riders associate Caltrain with many positive attributes, such as safety, comfort, and reliability, but those associations are fairly weak
- ▶ Over half of non-riders (56%) said that they don't ride Caltrain more because it's not near their home, doesn't go where they need to go, or because they don't travel along the corridor
 - Developing better connections with other transportation modes to overcome first- and last-mile challenges may help drive some non-riders to use Caltrain
- ▶ Two in five non-riders (42%) are identified as potential riders, based upon current behaviors and attitudes about public transportation and Caltrain.
 - Half of that group has primarily logistical barriers to Caltrain ridership, and half has primarily knowledge barriers.



**Part 1: Focus Groups
December 2018**



Overview of Focus Group Approach

Focus Group Research Approach

- ▶ Two focus groups were conducted in Sunnyvale with two populations: Regular/occasional Caltrain riders and Former/non-riders
 - Both groups included participants from San Francisco, San Mateo, and Santa Clara counties
 - Riders were recruited from Caltrain’s email list, as well as their website and social media. Riders have used Caltrain at least once in the past six months. The group included multiple bike users.
 - Former/non-riders have not ridden Caltrain in the past six months.
- ▶ Both groups were moderated by Sara LaBatt of EMC Research and were approximately two hours in length
- ▶ ***Please Note: focus groups are not quantifiable to or representative of any larger population of CA residents. For quantitative results, please refer to the survey sections of this report.***

City	Date	Group	# of participants
Sunnyvale	12/8/18	Riders	11
Sunnyvale	12/8/18	Former/Non-riders	10

Outline of Focus Group Discussions

The discussion guides for each group covered the following topics:

RIDERS

- ▶ Getting around the Bay Area
- ▶ Caltrain satisfaction/trip details
- ▶ Fare media
- ▶ Rider experience
- ▶ Caltrain improvements

FORMER/NON-RIDERS

- ▶ Getting around the Bay/use of transit
- ▶ Perceptions of Caltrain
- ▶ Understanding of Caltrain trip planning
- ▶ Fare media
- ▶ Caltrain improvements



Summary of Focus Groups

Key Focus Group Findings

- ▶ Caltrain's **brand reputation is strong** among both riders and non-rider participants. Even those who don't use the service see it as clean and reliable, especially as compared with other local transit systems.
- ▶ Both riders and non-rider participants are **aware of the first and last mile issue** when it comes to transit.
- ▶ The Caltrain system is **not as easy to navigate** as it seems, even for riders. Zones, types of trains, and stations can be challenging, especially to less-frequent riders.
- ▶ The consequences of missing one's train are viewed as harsh compared to other transit modes like BART. **More frequent service** was a topic discussed in both groups.
- ▶ A system that **makes a trip that involves multiple modes more seamless** (Caltrain, other public transit providers, bike shares, scooters, rideshares, private shuttles) would be attractive to many, especially non-riders.

Key Focus Group Findings – Riders

- ▶ Riders reported that they use Caltrain because it **benefits their quality of life**, but that benefit isn't necessarily quantifiable in money and time.
- ▶ Caltrain was generally viewed as **safe and reliable** by participants.
- ▶ **Crowding is a problem** onboard Caltrain.
- ▶ Other problems riders experience onboard were due to **fellow riders**.
- ▶ Suggestions for service changes revolved around **increasing the frequency** of trains.
- ▶ Riders had **mixed awareness of CalMod and electrification**. Ideas for new equipment included solutions to crowding problems.
- ▶ Many **acknowledged the challenges cyclists face** riding Caltrain, including many non-cyclists, and there was little animosity from non-cyclists at suggestions to improve the cyclist experience.
- ▶ Riders appreciated that Caltrain makes **significant efforts to communicate** about service interruptions and other issues, but would like easier access to official real-time train information.

Key Focus Group Findings – Non-Riders

- ▶ While non-riders viewed Caltrain favorably, there were **significant barriers** to them becoming riders (especially related to first/last mile).
 - They were not confident in making first/last mile connections, and that made them apprehensive about riding Caltrain.
 - Additionally, they had concerns about the frequency of service, feeling that if they miss a train, they may be stuck waiting a long time for the next train.

- ▶ Non-rider participants had a number of **ideas on how to help people like them learn about service** and for service improvements to meet their needs.
 - Expected to see/hear ads or news about Caltrain on the radio, on billboards by highways, and on other local news sites.
 - Having a cost comparison calculator for riding the train vs. driving would be useful.
 - More guidance about how to ride the train would also be helpful.



Detailed Focus Group Findings

Brand Reputation is High

Caltrain's brand reputation is strong among both riders and non-rider participants.

- ▶ Even those who don't use the service see it as clean and reliable, especially as compared with other local transit systems.

"I love Caltrain because **it's way faster, usually more reliable than driving**. Driving can be a gamble, right? Can be an hour and a half, could be two hours. Who knows? Depending on whether it rains, there's a ballgame, whatever. So reliability, frequency, I love the bullets especially. That saves so much time, **it's amazing.**"
- Christine, rider woman

"It's a lot cleaner and safer than BART. You have separate seats. You don't have all the crazy people, the beggars."
- Marissa, non-rider woman

Awareness of First/Last Mile

Both rider and non-rider participants are aware of the first/last mile challenges with transit.

- ▶ Riders either have destinations that are easy to access from the station, or are willing to utilize an additional method of transportation to reach their destinations.
- ▶ Non-riders are largely aware that first/last mile is a challenge, but are unable or unwilling to find a solution that allows them to take Caltrain.
- ▶ There was limited awareness of shuttle programs and other coordinated connections for both riders and non-riders. More advertising of existing shuttles and other services to and from stations could help overcome this issue.
- ▶ However, service between station and final destination needs to be reliable and attractive to riders. Many don't see a public bus as an option.

“For Caltrain to be better adopted, it **needs to address the last mile problem** because Caltrain only works if you're trying to go to the southeast end of San Francisco. If you want to go anywhere else, you have to connect to a different transit system, pay for rideshare, or take a bike.”
 - Elaine, rider woman

“The Bay Area has decent enough arteries, like BART...but then, the capillaries, the little paths out aren't that great. That kind of **last mile or last three miles for at least the city is a little bit harder.**”
 - Daniel, non-rider man

Navigation Can be Difficult

The Caltrain system is not as easy to navigate as it seems, even for riders.

- ▶ While it is a single north/south line, the concept of zones and the different types of trains (bullet, limited and local) are confusing.
- ▶ Sometimes the stations are hard to navigate.

“I think you can figure it out over time, but it's not obvious. **You have to spend a long time analyzing the spreadsheet that is the time table.**”

- Erica, rider woman

“Fourth and King can have multiple trains sitting in the station. **It's not as easy as just going to the northbound or southbound track.** You kinda have to check the boards.”

- Brandon, non-rider man

“If Caltrain wants to improve, all it has to do is take a look at **transit systems all over the world that have way better signage** than this. In Europe, Asia, any civilized country that has good public transit.”

- Christine, rider woman

More Frequent Service Desired

The consequences of missing one's train are viewed as harsh compared to other transit modes like BART.

- ▶ More frequent service was a topic discussed in both groups.

"I think **running more trains would be better for everyone**, because it would give the riders more time options too. If you stop at a non-limited where bullets stop, you really have like once an hour availability."

- Elaine, rider woman

"Right now, it's not like BART, where you'll just go and wait for the next train. [With Caltrain] you look at the schedule. 'Okay, I gotta be there at 10:30 'cause **if I miss that, I'll be waiting an hour.**'"

- Brandon, non-rider man

Desire for Seamless Connections

A system that makes a trip that involves multiple modes more seamless would be attractive to many participants, especially non-riders.

- ▶ Participants crave easy connections between Caltrain, other public transit providers bike shares, scooters, rideshares, private shuttles, etc.
- ▶ Would reduce “cognitive burden” that holds some back from planning trips using Caltrain.
- ▶ Clipper usage is common among riders. Non-riders have low awareness of Clipper.

“A lot of stuff in Mountain View is not close to the station...Shoreline Amphitheater is pretty far away... Because of that uncertainty, **you can't make a connection from that venue to Caltrain, so that's why I don't do it.**”

- Elaine, rider woman

“**It's the whole package.** It's not just how I have to wait for the next train. It's how I would likely get there, what would I take from where I'm going to get to that point.”

- Daniel, non-rider man



Detailed Focus Group Findings: Riders

Riders: Caltrain Benefits Quality of Life

Rider participants report using Caltrain because it benefits their quality of life, but that benefit isn't necessarily quantifiable in money and time.

- ▶ Commuting is stressful, but the ride on the train is relaxed, and they don't have to sit in traffic.
- ▶ They are able to do work on the train.
- ▶ They are not afraid of the "unpredictability" of the Caltrain commute and/or they do not feel in control while driving (because of traffic).
- ▶ The train is more reliable than driving.
- ▶ Some problems with tackling the first/last mile issue, but riders had found ways around that.

"I find it relaxing. I can just listen to music, watch a movie, and just watch the world go by."
- Dominic, rider man

"It's such a nice pressure relief to know that I got to where I was going and I **don't have to worry about anything**. I think that's like the biggest benefit."
- Wen, rider man

Riders: Caltrain Safe and Reliable

Caltrain is generally viewed as safe and reliable by rider participants.

- ▶ It's clean and well-kept up, especially compared to other transit systems.
- ▶ Riders generally believe that Caltrain wants them to enjoy their experience on the train.
- ▶ Conductors make Caltrain different from other systems and are an asset – help make the experience safe and pleasant.

“It's been a reliable form. I have a lot of confidence in Caltrain to be able to say ‘I can get from A to B pretty confidently and successfully. I can make my time frame.’ So **that's always a great feeling.**”
- Elaine, rider woman

“Conductors will intervene and kick people off when appropriate. I think that really helps maintaining a **clean and safe train** where you don't have to feel like, ‘Just let me out because these people are driving me nuts.’ And I've had that on other transit systems.”
- Wen, rider man

Riders: Crowding is a Problem

Crowding is a problem onboard Caltrain.

- ▶ Rider participants recognize limitations of the equipment and train cars, and do not blame Caltrain for the issues.
- ▶ Some riders will change their schedule so they can ride less crowded trains.
- ▶ It is hard to get off of a crowded train.
- ▶ Riders report not being opposed to standing, but equipment is not designed for standing room – places to stand are awkward, block those getting off of the train, and don't have accessible handholds.

"I take the concentrated efforts to take the early train even though it's longer. Just because it's less crowded."

- Lam, rider man

"The design of the train, I think they're **not built to have standing passengers, so that's a huge problem.** I mean, you're better off if you're on a crowded train to be on a bombardier because it's a lot easier to get off around standing people, whereas if it's a gallery car, then you've got people lined up on the top row and you have to squeeze past them."

- Hillary, rider woman

Riders: Rider Behavior Causes Problems

Some of the issues participants experience onboard are due to fellow riders.

- ▶ Other riders contribute to crowding: standing in the way, not moving when asked, putting bags on seats instead of laps, poor manners in general.
- ▶ Not everyone is comfortable approaching another rider to discuss their behavior – they would prefer Caltrain have a program to encourage or require rider courtesy.
- ▶ Conductors can help in this effort, but having posted rules available about moving out of the way and keeping bags off seats may empower some riders to deal with these issues themselves.
- ▶ Some sort of educational sheet for new riders would be useful.

“There's passengers in the bike car, who are clearly not riding bikes, but they're just too lazy to walk further down to go into a normal passenger car... **It's really hard to tell other passengers, 'Can you just please move?'**” - Christine, rider woman

“**Making an announcement sort of empowers the rider a bit.** So if there is an announcement that says 'Please move to the back.' Then that sort of emboldens the people who are getting on the train to say 'Hey, this guy said...'”
- Dave, rider man

Riders: Strong Desire for Increased Frequency

Suggestions for service changes revolved around increasing frequency of trains.

- ▶ Rider participants would like to see more frequent service. This would not only help with crowding, but would make their commutes easier.
- ▶ Riders especially want more frequent service during the evenings and weekends. Some suggested more bullet trains on the weekends.
- ▶ Riders would like to see more Clipper readers at the stations.
- ▶ More conductor staff would alleviate problems with other riders and make Caltrain run smoother.

“Address the congestion by offering more trains. It will make each train a lower-stakes thing for the riders”
- Elaine, rider woman

“Better evening service. Evening and weekends... And more Clipper readers. There are some stations you have to walk to the opposite end of the platform.”
- Miguel, rider man

Riders: Mixed Awareness of Electrification

Riders had mixed awareness of CalMod and electrification. Ideas for new equipment included solutions to crowding problems.

- ▶ Rider participants imagine new trains will run more smoothly with less diesel smell.
- ▶ Wi-Fi is a nice thing to have, but it's not a need to have for many riders. Those interested in Wi-Fi are open to watching an ad to access it.
- ▶ Having more outlets and USB charging ports would be appreciated by riders.
- ▶ Riders would like to see maps and live signage about wayfinding.
- ▶ Having more designated areas to stand in new cars would alleviate crowding.

“With the electric powered engines, you won't smell the diesel or the exhaust.”
- Bennett, rider man

“Wi-Fi would be great but I think that's getting into the “nice to have” category. Like, the reliability, availability stuff is much more important to me.”
- Elaine, rider woman

Riders: Little Animosity Toward Cyclists

Many participants, including non-cyclists, acknowledged the challenges cyclists face riding Caltrain, and there was little animosity from non-cyclists at suggestions to improve the cyclist experience.

- ▶ Cyclists and non-cyclist participants alike see that current equipment has inherent limitations for bike storage.
- ▶ Cyclists face specific problems due to non-cyclists' behavior (crowding the bike cars, etc.).
- ▶ It's important to cyclists to be near their bikes, as theft occurs, but also so they know if someone moved their bike and so they have more time to prepare to exit the car.

"I think if there was a **consistent layout**, so **everyone knew** every train...then people who regularly ride it would know, 'Okay that's where the bikes are, and I know that I should go to a different car.'"

- Hillary, rider woman (non-cyclist)

"I don't think seats [near bikes] are necessarily the solution, but I think **there should be a policy to prioritize bikers** to be next to their bikes to prevent theft."

- Elaine, rider woman (cyclist)

Riders appreciate that Caltrain makes significant efforts to communicate about service interruptions and other issues, but would like easy access to official real-time train information.

- ▶ Participants who use Twitter find that the updates are prompt and help them adjust to delays.
- ▶ However, not all riders are on social media, and would like an official line of communication from Caltrain, such as a Caltrain-branded app.
- ▶ Apps riders mentioned using were Transit, Citymapper, and the CaltrainMe app.
- ▶ Signage in stations could be clearer and available in other languages. Where to get on and off the train is not always intuitive.

“I really like the Twitter account. I actually have the pop-up alerts on my phone every single time there's something 'cause it's usually very prompt about delays.”

- Bennett, rider man

“Is there an official app?...I don't check Twitter, I don't do that. Is there an official source [that says] ‘Hey, everything is delayed’?”

- Christine, rider woman



Part 2: Rider and Non-Rider Surveys



Rider Survey: Methodology and Findings

Rider Survey Methodology

- ▶ Web survey of those who ride Caltrain more than once every six months; survey links posted on the organization's website and newsletter, as well as Caltrain's Facebook and Twitter accounts. Phone option available for those who called in to request it.
- ▶ Survey conducted February 21 – April 1, 2019
- ▶ 1,817 interviews; overall margin of error +/- 2.3%
- ▶ Surveys were offered in English, Spanish, Mandarin, and Vietnamese
- ▶ Surveys conducted by phone were done by trained, professional interviewers

Please note that due to rounding, some percentages may not add up to exactly 100%.

Rider Survey Key Findings

- ▶ Caltrain riders are by and large satisfied with Caltrain, giving the system a +56 net positive rating.
 - For riders, Caltrain's strengths are safety, easy-to-navigate stations, its easy-to-understand system, and cleanliness.
 - Over half of Caltrain riders have been using the system for more than four years.

- ▶ Riders would like to see more frequent service, and say this would increase their ridership and satisfaction with the system.
 - While riders want to see more service across the board, their highest priorities are more peak weekday trains and more frequent weekend trains.

- ▶ Cyclists would like to see more bike racks and space for their bicycles, as well as a better process for boarding with their bikes.

- ▶ Riders prioritized adding capacity in the new train cars – seating first, but also better areas for standing.
 - Riders express a clear preference for ad-funded Wi-Fi over paid Wi-Fi on the new trains, but it's a much lower priority than capacity improvements.

Rider Survey Grouping Definitions

In this report, we break out data by the following groupings:

- ▶ ***Frequent Riders (65%):*** Respondents who indicated riding Caltrain at least once a month
- ▶ ***Occasional Riders (35%):*** Respondents who indicated riding Caltrain between once a month and every six months
- ▶ ***Peak Riders (66%):*** Non-exclusive grouping of respondents who indicated riding Caltrain during peak hours at least once a week
- ▶ ***Off-Peak Riders (37%):*** Non-exclusive grouping of respondents who indicated riding Caltrain during off-peak or weekend hours at least once a week
- ▶ ***Uses bike in commute to home station (16%):*** Respondents who indicated they rode their own bike, or used a bike or scooter share, as their mode of transportation to their home/origin station

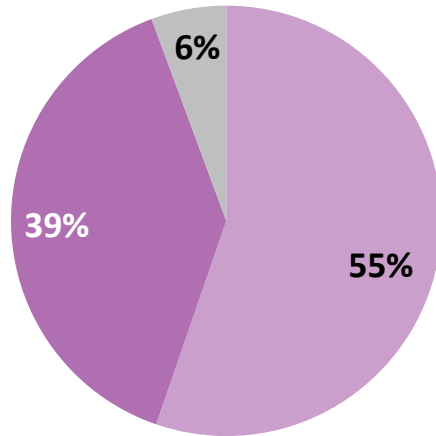


Rider Demographic Profile

Rider Profile: Gender, Age, Ethnicity, and Language

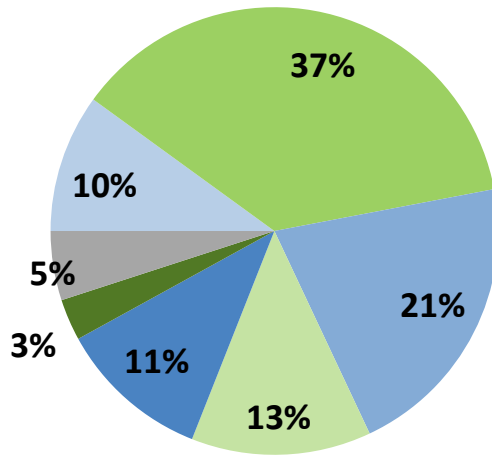
Gender

- Men
- Women
- Other/Ref

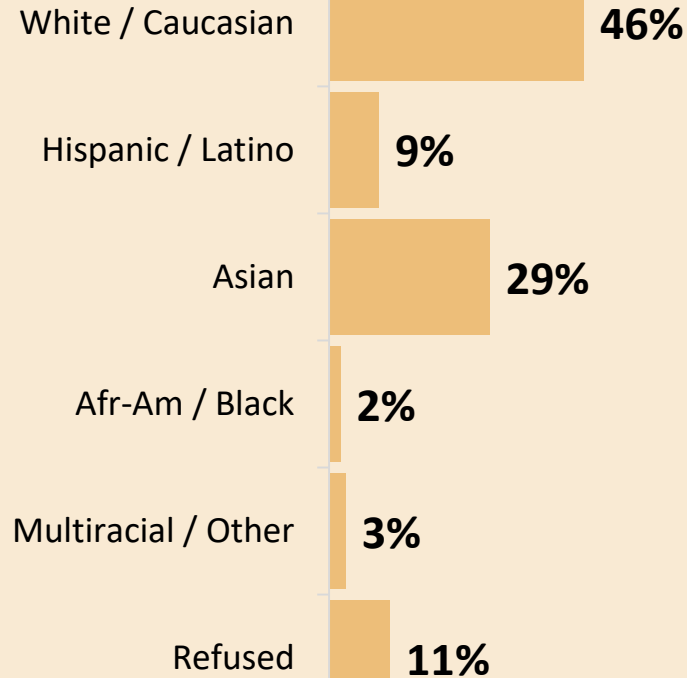


Age

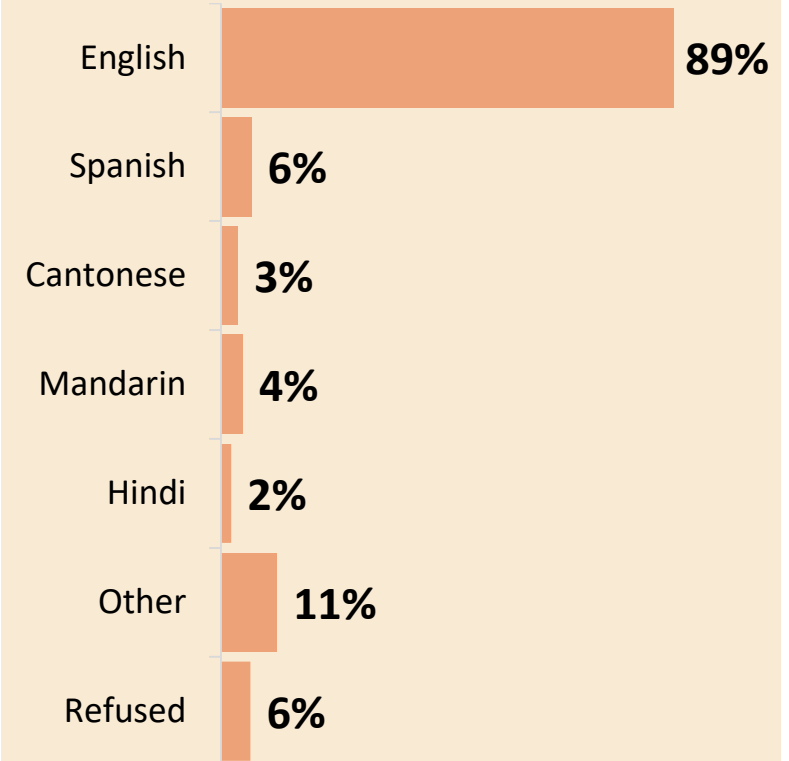
- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65+
- Refused



Combined Ethnicity



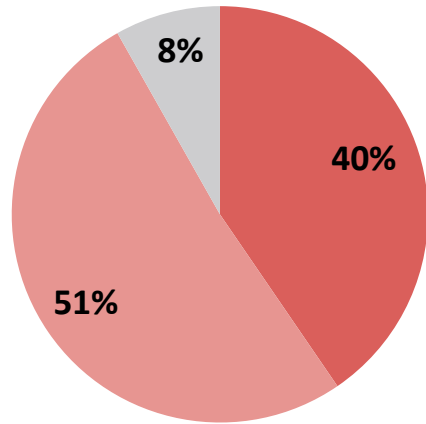
Language(s) Spoken at Home*



Rider Profile: Home Ownership, Years in Bay, and Income

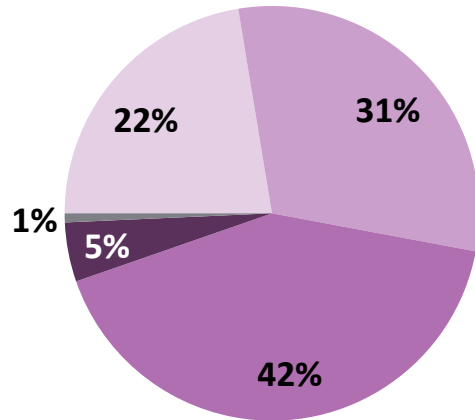
Own/Rent

- Own
- Rent
- Other/Ref

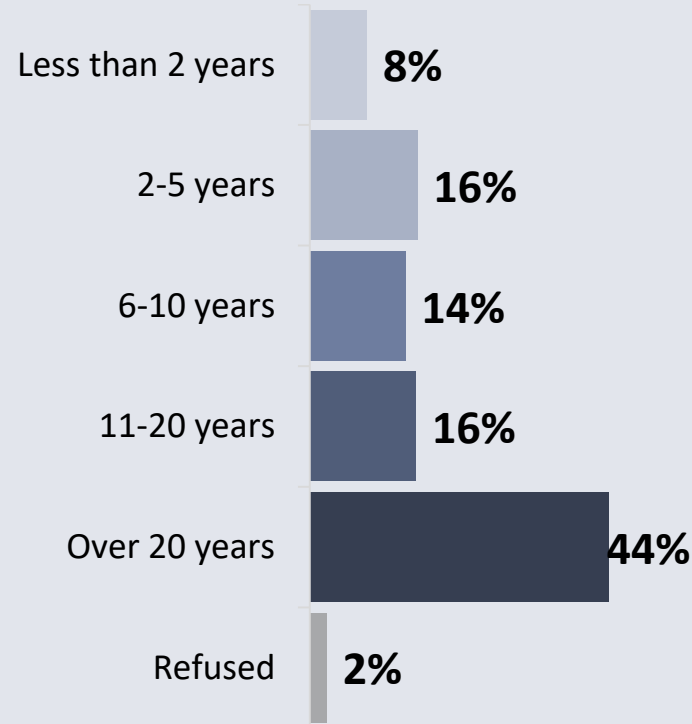


County

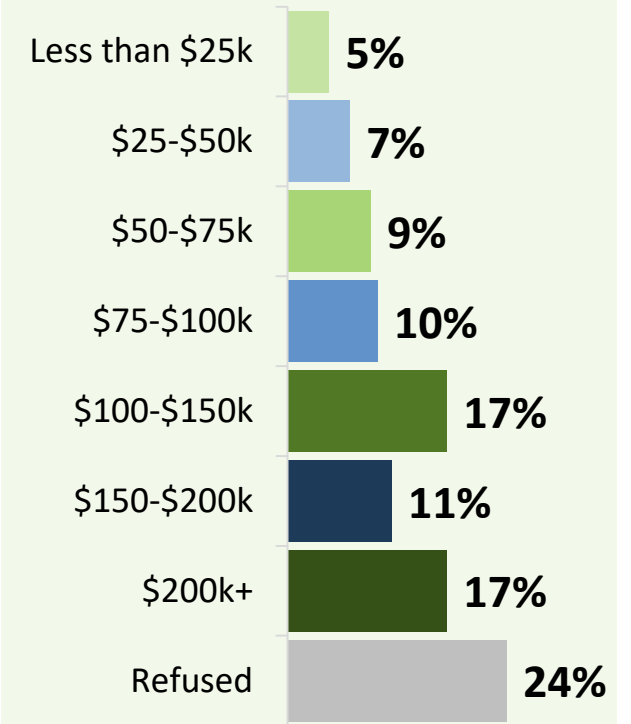
- San Francisco
- San Mateo
- Santa Clara
- Another county
- Prefer not to respond



How many years have you lived in the Bay Area?



Total household income before taxes in 2018?

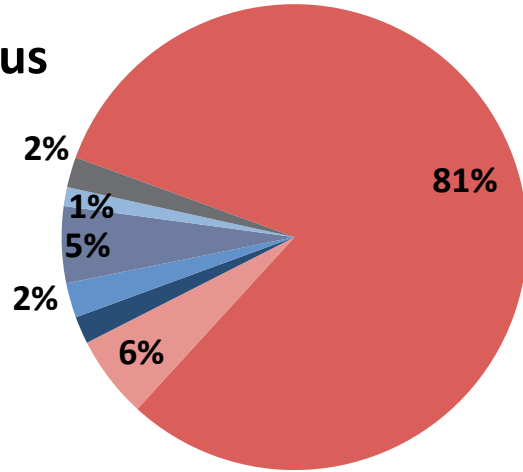


Q105. What county do you live in?
 Q113. Do you own or rent your apartment or home?
 Q114. How many years have you lived in the Bay Area?
 Q120. What was your total household income before taxes for 2018?

Rider Profile: Education & Household Size

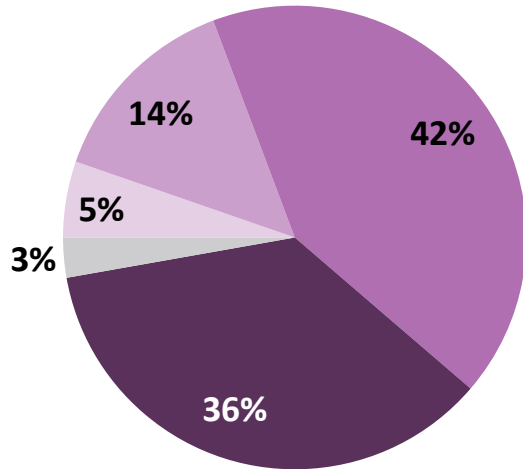
Employment Status

- Employed full-time
- Employed part-time
- Unemployed
- Retired
- Student
- Homemaker
- Other/Refused

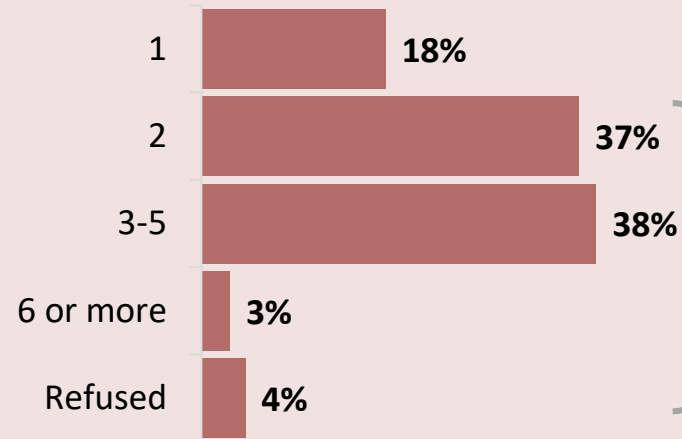


Education

- HS or Less
- Some College
- College
- Grad School
- Refused

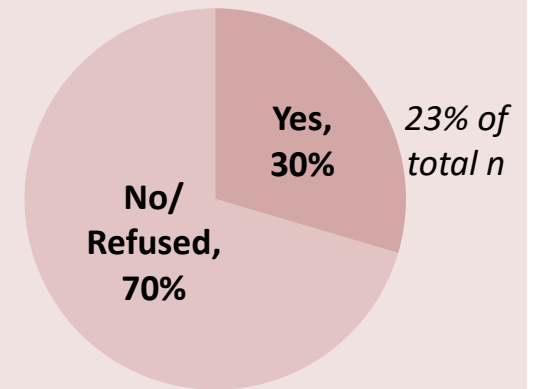


Including yourself, how many people live in your household?



Children under 18?

Asked of those who say more than 1 in household; n=1,447



Q110. What is the last grade you completed in school?
 Q111. Including yourself, how many people live in your household?
 Q112. Do you have any children under the age of 18 in your home?

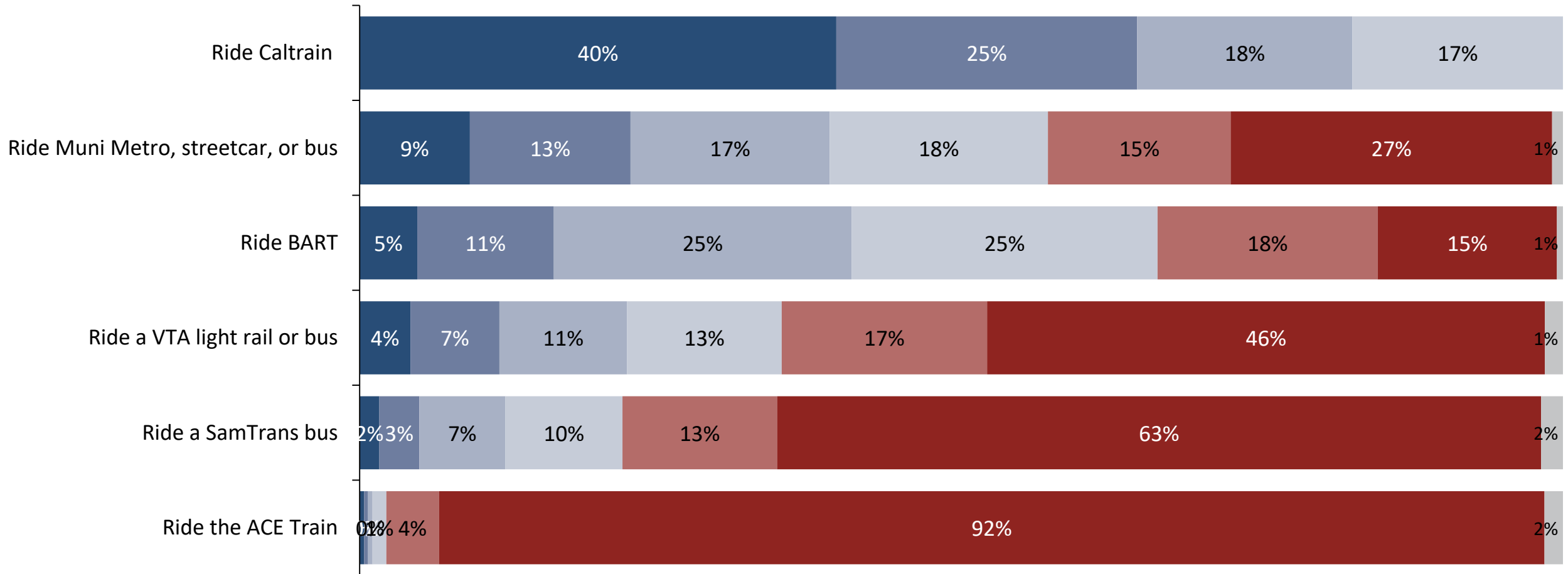


Ridership Characteristics

Methods of Transportation – Public

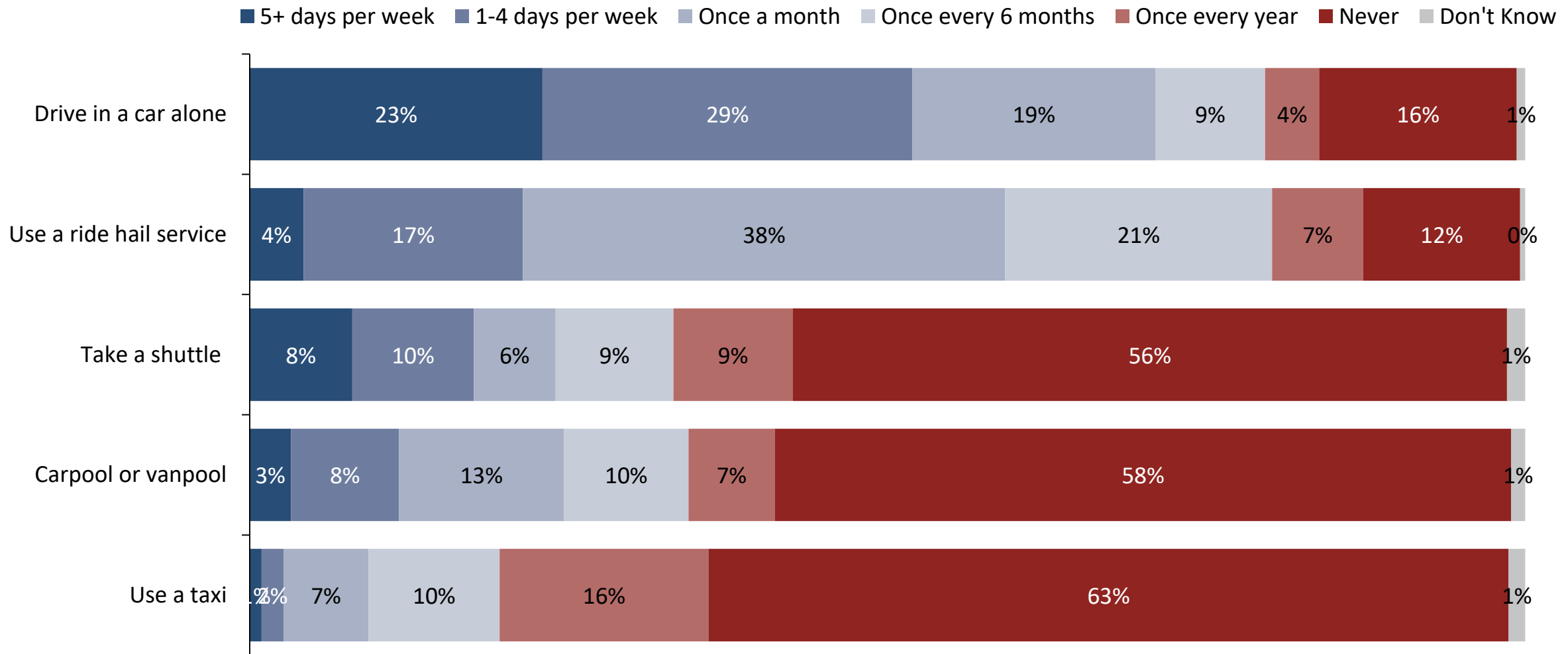
Most Caltrain riders ride at least once a week; many are also riders of other public transit systems.

■ 5+ days per week ■ 1-4 days per week ■ Once a month ■ Once every 6 months ■ Once every year ■ Never ■ Don't Know



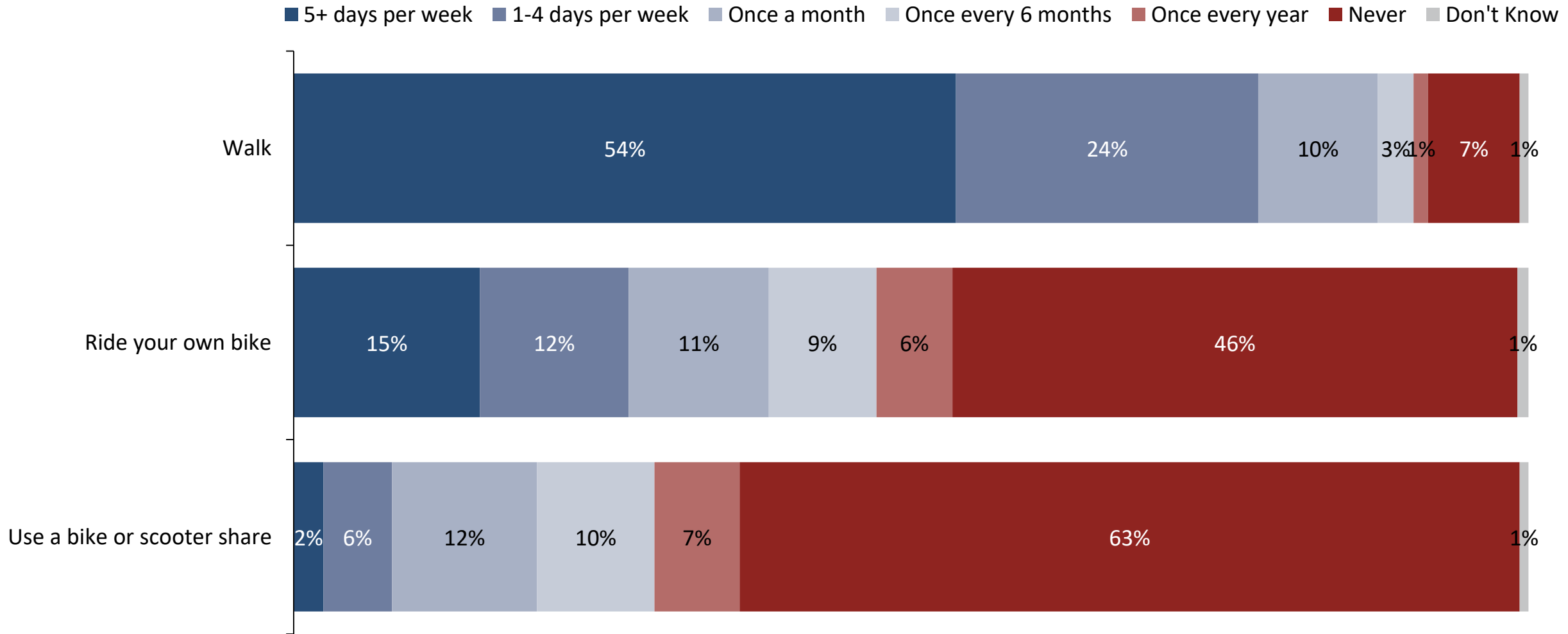
Methods of Transportation – Private

Many Caltrain riders are also solo drivers, and their use of ride hail services is extensive.



Methods of Transportation – Active

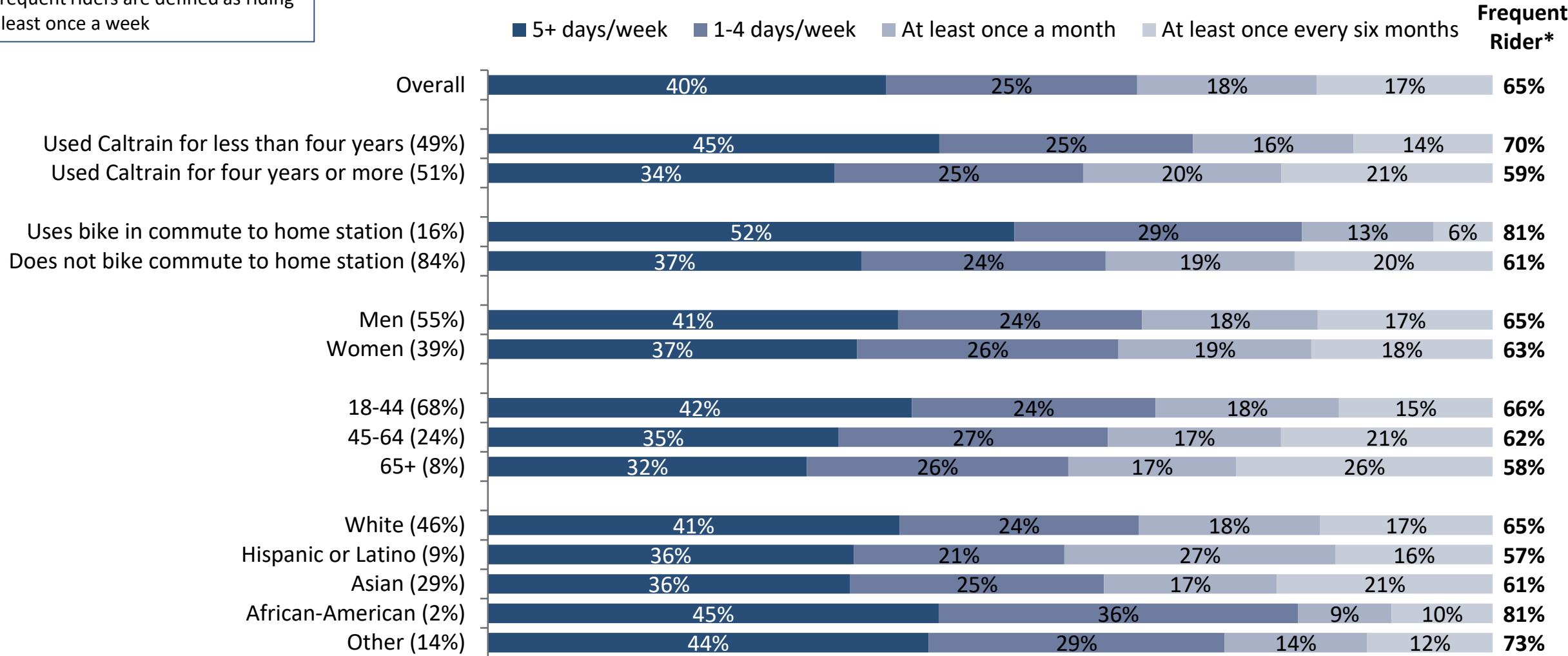
Most Caltrain riders also walk for transportation, and about one quarter travel by bike at least once a week.



Caltrain Ridership Frequency

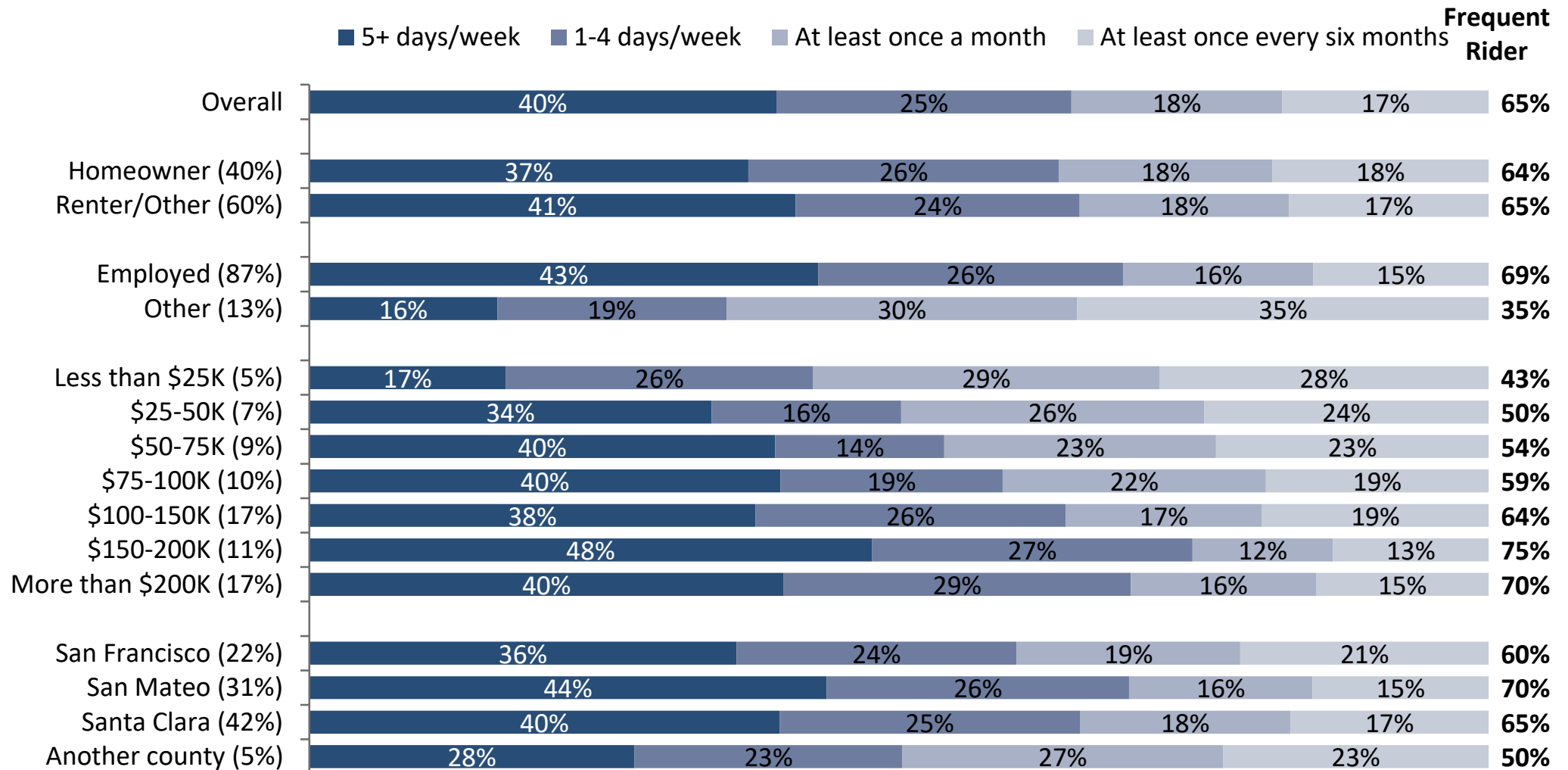
More than three in five Caltrain riders ride at least once a week. Younger riders are more likely to ride frequently.

*Frequent riders are defined as riding at least once a week



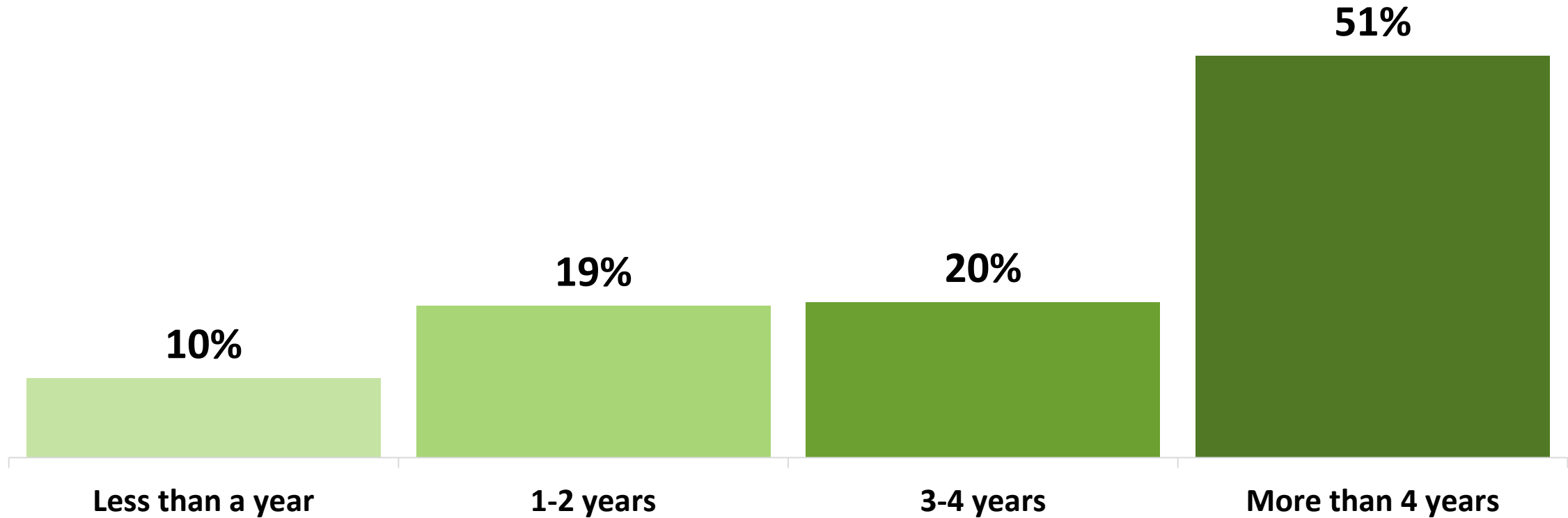
Caltrain Ridership Frequency

Employed riders are more likely to ride frequently, reflecting Caltrain's common use by commuters. Higher-income riders are more likely to be frequent riders.



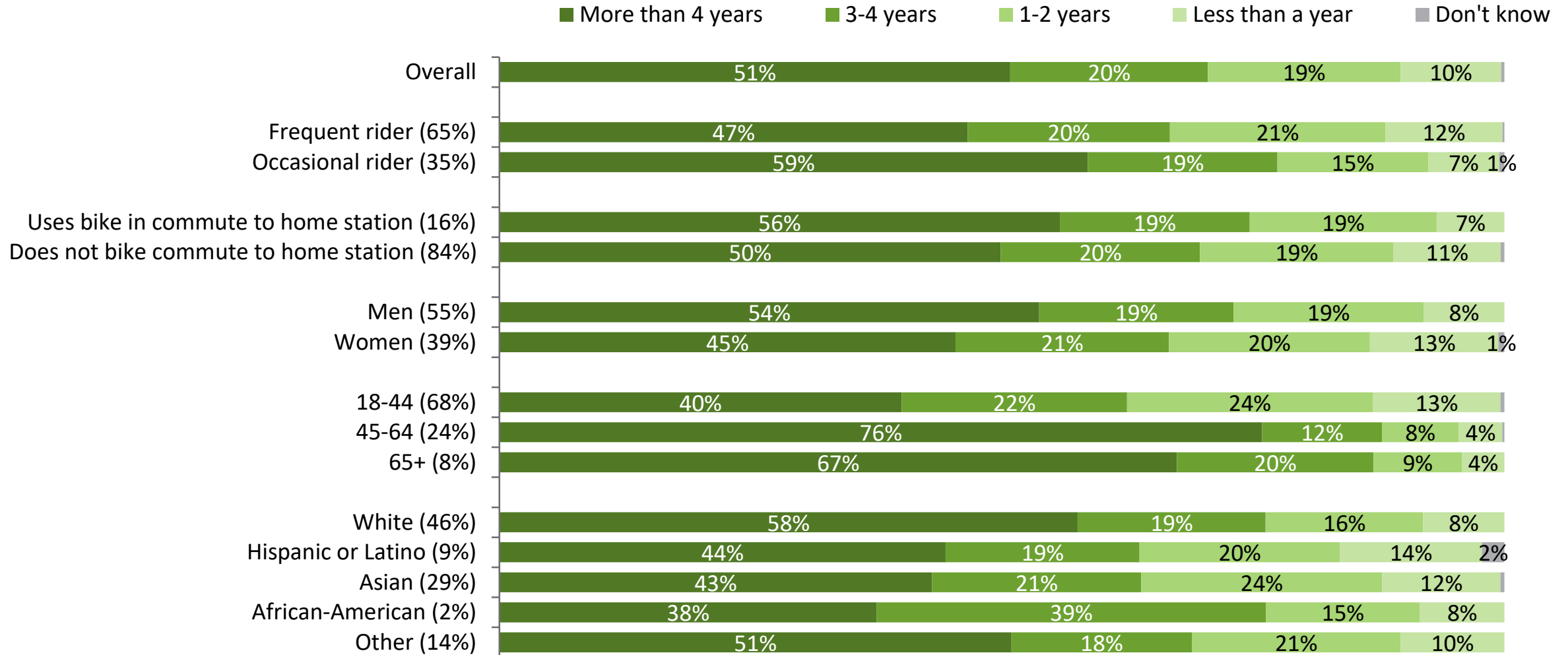
Length of Time Riding Caltrain

Half of Caltrain riders have been using the system for four or more years. One in ten have started riding in the last year.



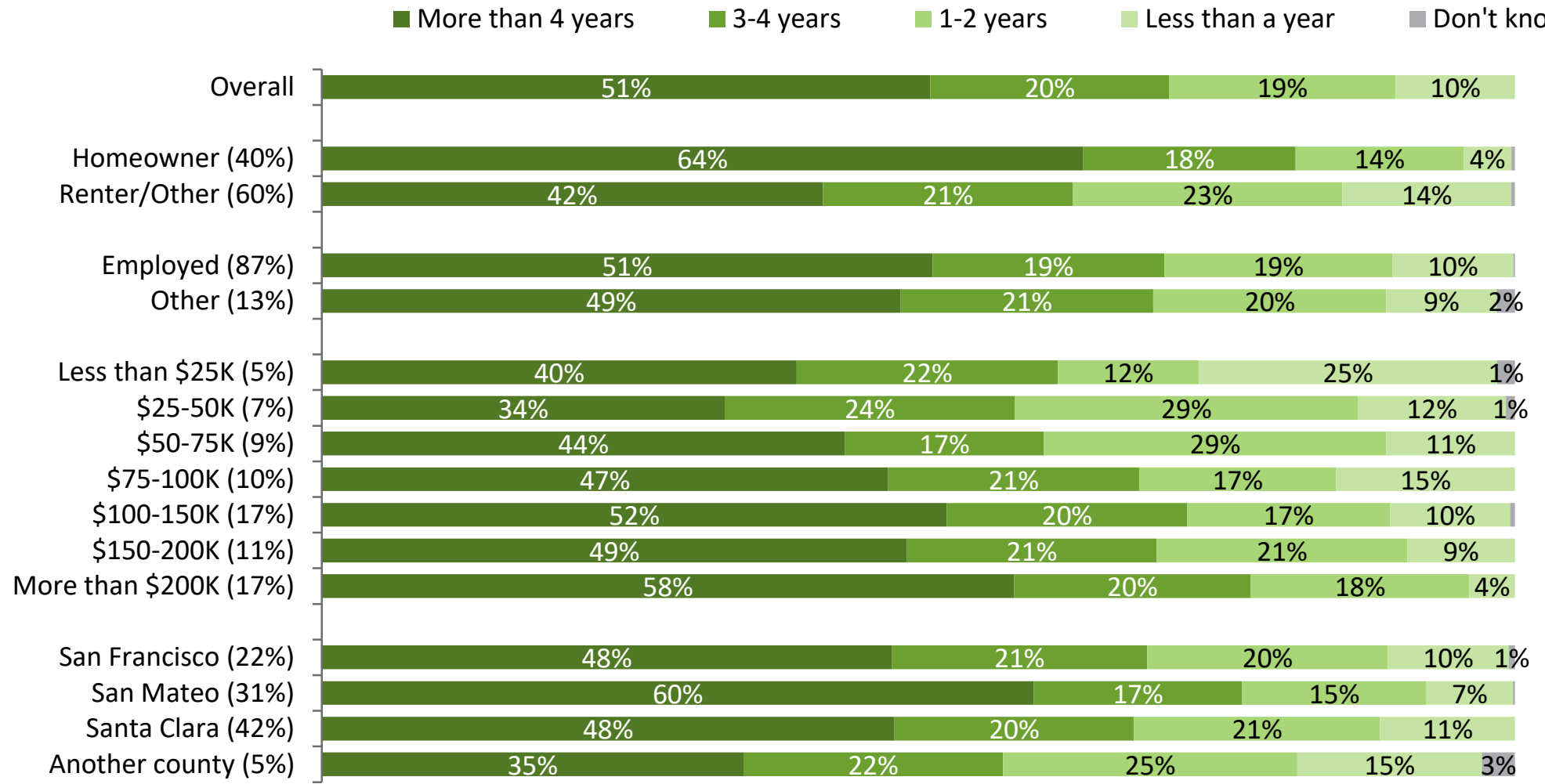
Ridership History

Occasional riders and older riders are more likely to have been riding Caltrain for more than four years.



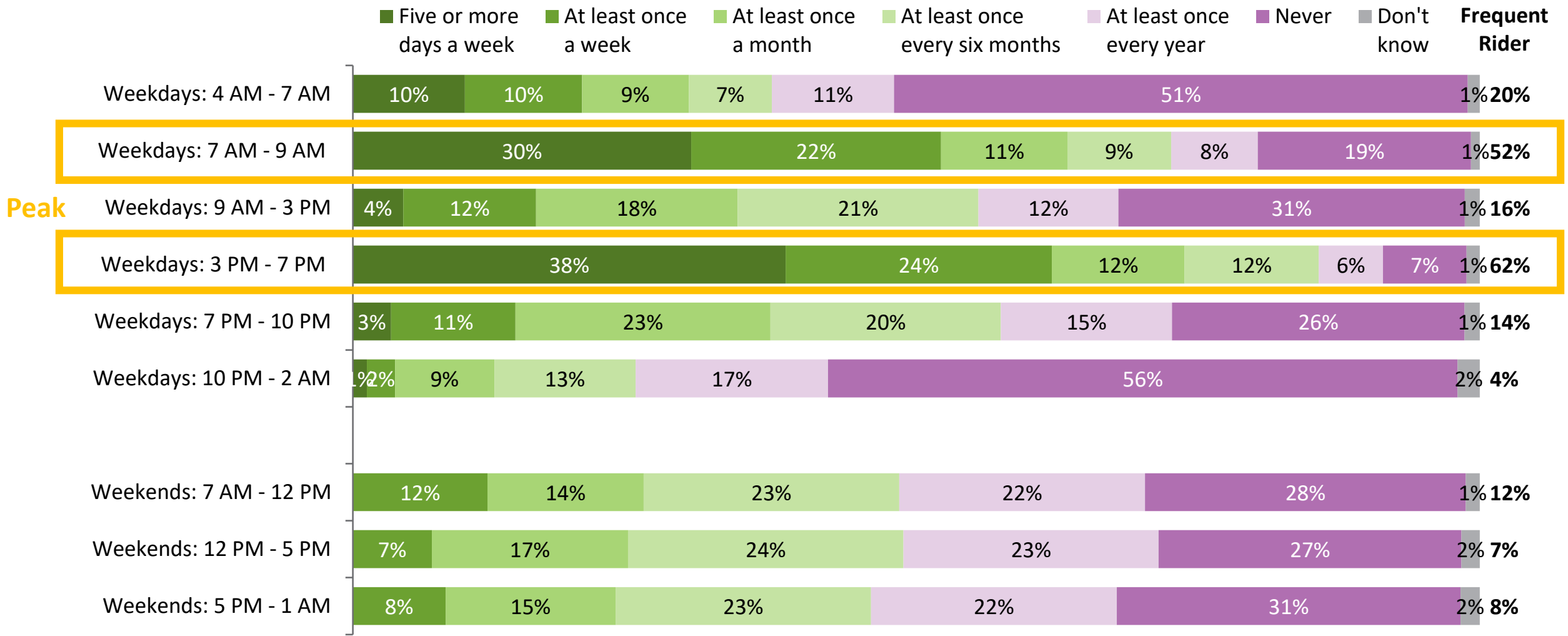
Ridership History

Riders who live in San Mateo County, as well as higher-income riders, are more likely to have a longer ridership tenure than those in other counties.



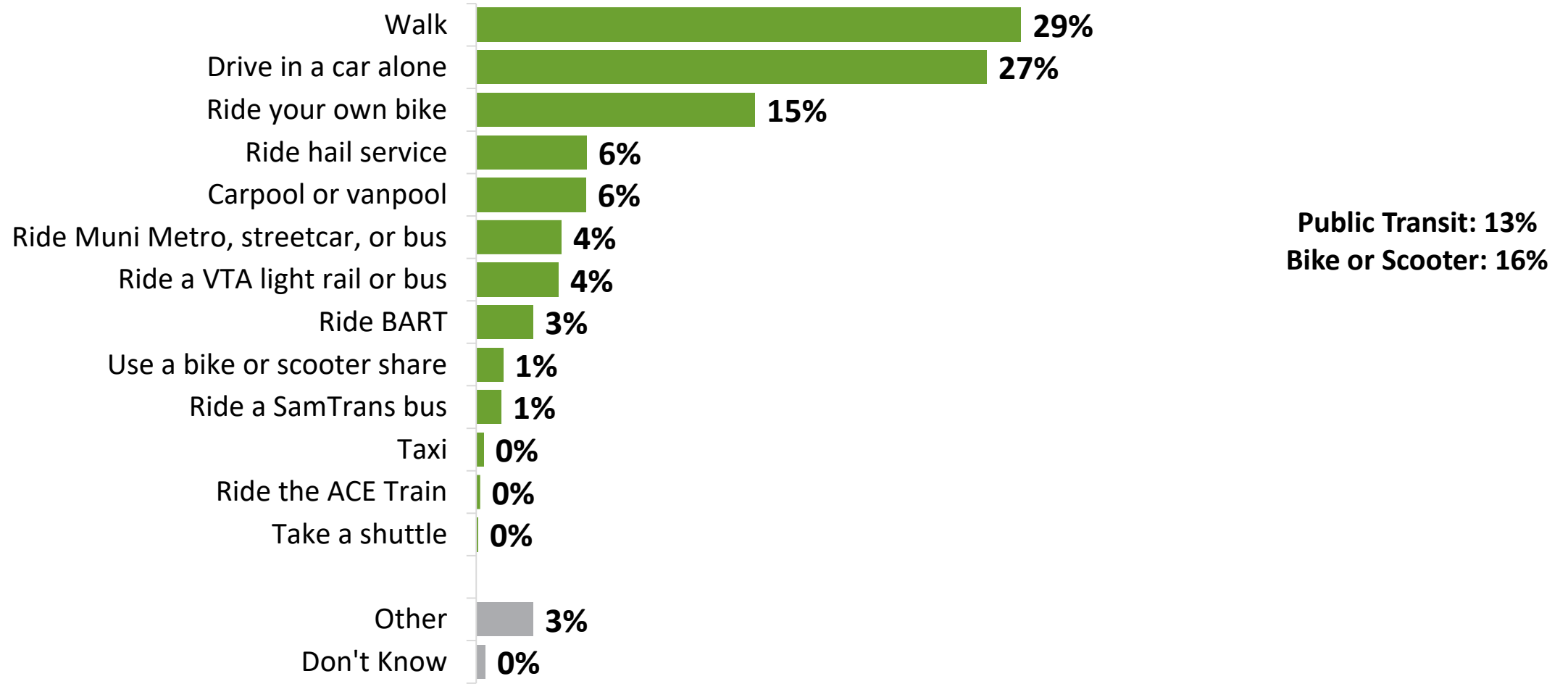
Ridership Frequency

The weekday evening commute period (3 PM -7 PM) sees more Caltrain riders who ride 5+ days per week than any other time. Few riders say they ride Caltrain late on weekdays (10pm-2am) once a week or more.



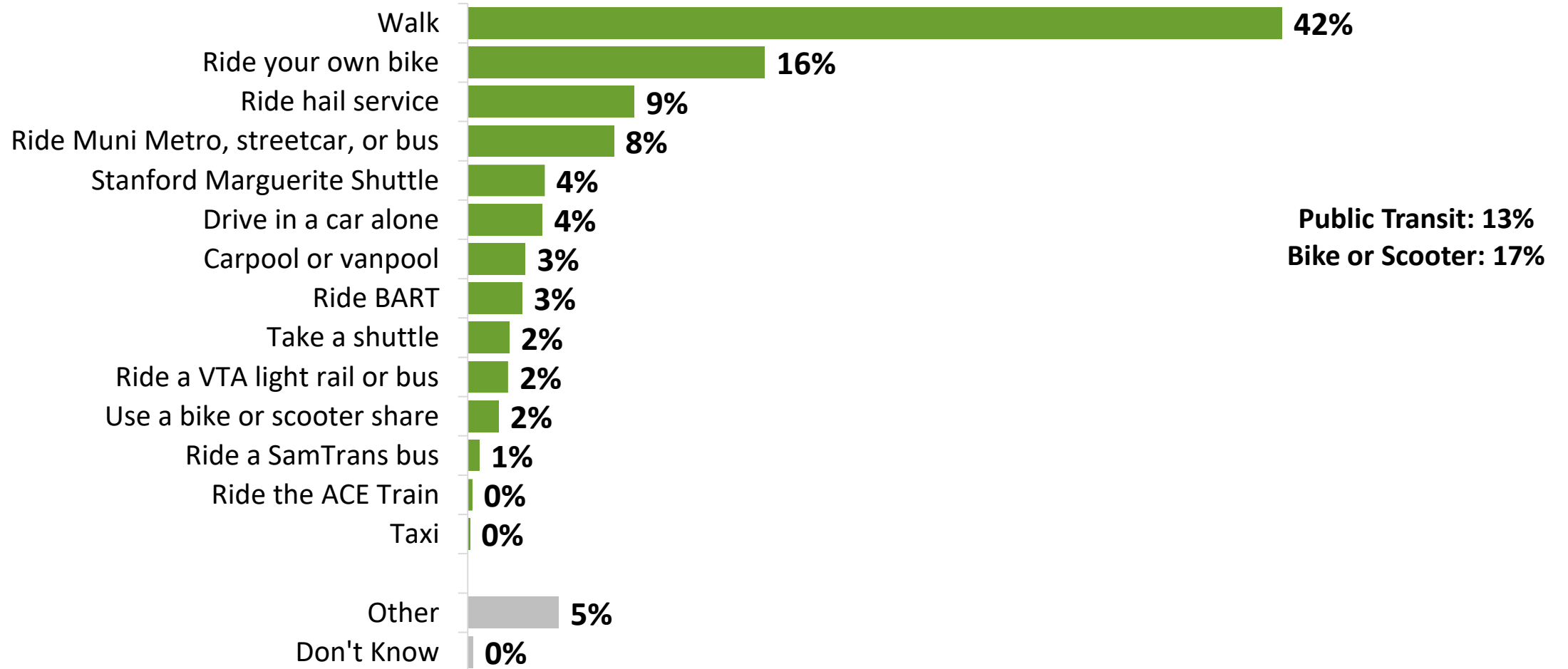
Mode of Transport to Home/Origin Station

Almost three out of ten riders walk to their home station, and a little over a quarter drive by themselves.



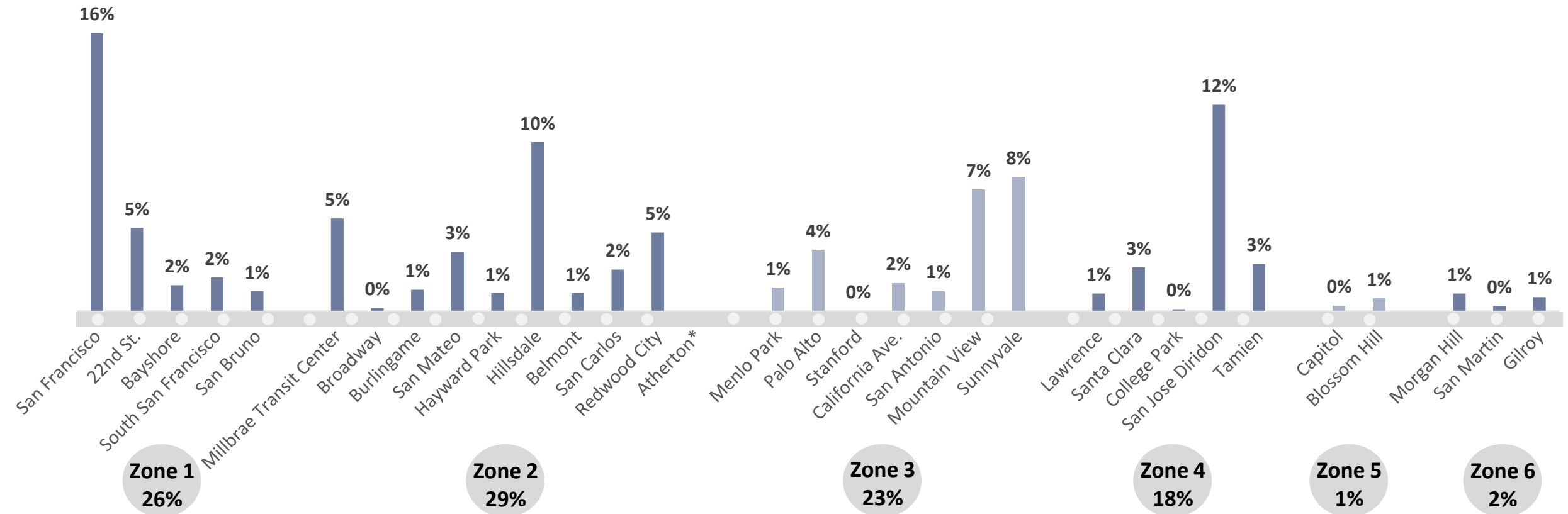
Mode of Transport from Destination Station

More than two in five riders walk to their final destination. Other common methods of transport include riding one's own bike, utilizing a ride hail service, or taking Muni.



Home/Origin Station

The most common home/origin stations for riders are scattered across zones, and include San Francisco, San Jose Diridon, Hillsdale, Sunnyvale, and Mountain View.

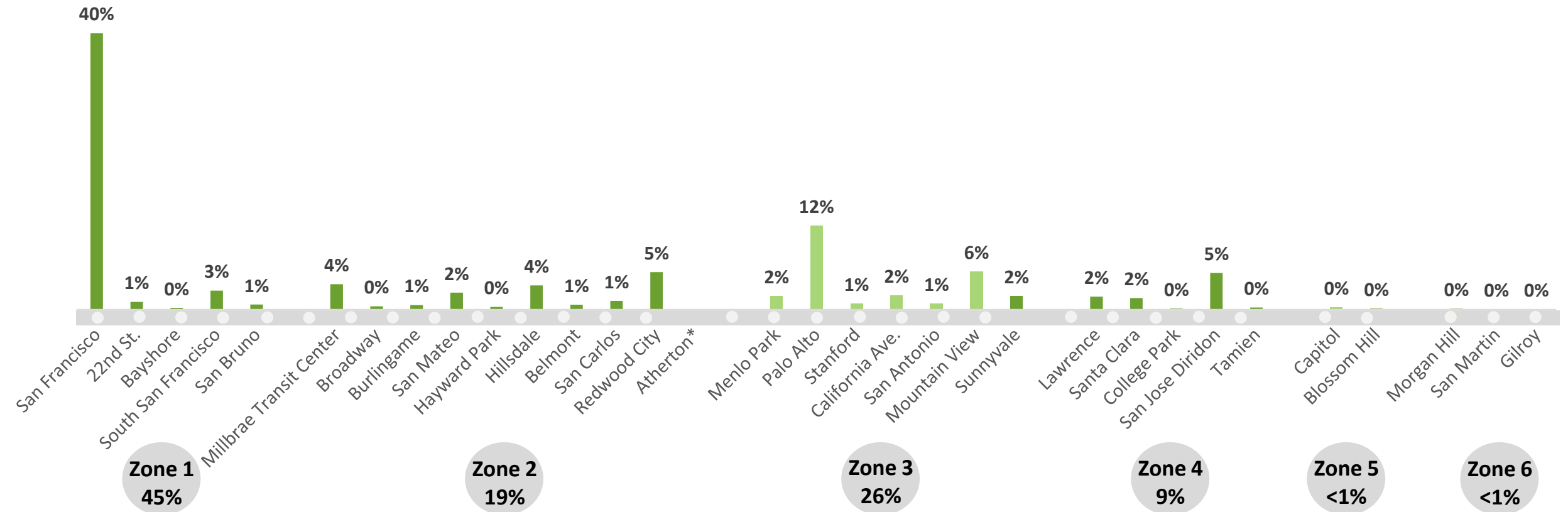


Q42. Thinking about the trips you take on Caltrain, what is the most common home/origin station, meaning the one where you get on the train to get where you are going?

* Note: No respondents said that Atherton was their most common home/origin station.

Destination Station

The most common destination station for riders is San Francisco, at the northern terminus of the line. Palo Alto, Mountain View, San Jose Diridon, and Redwood City follow.

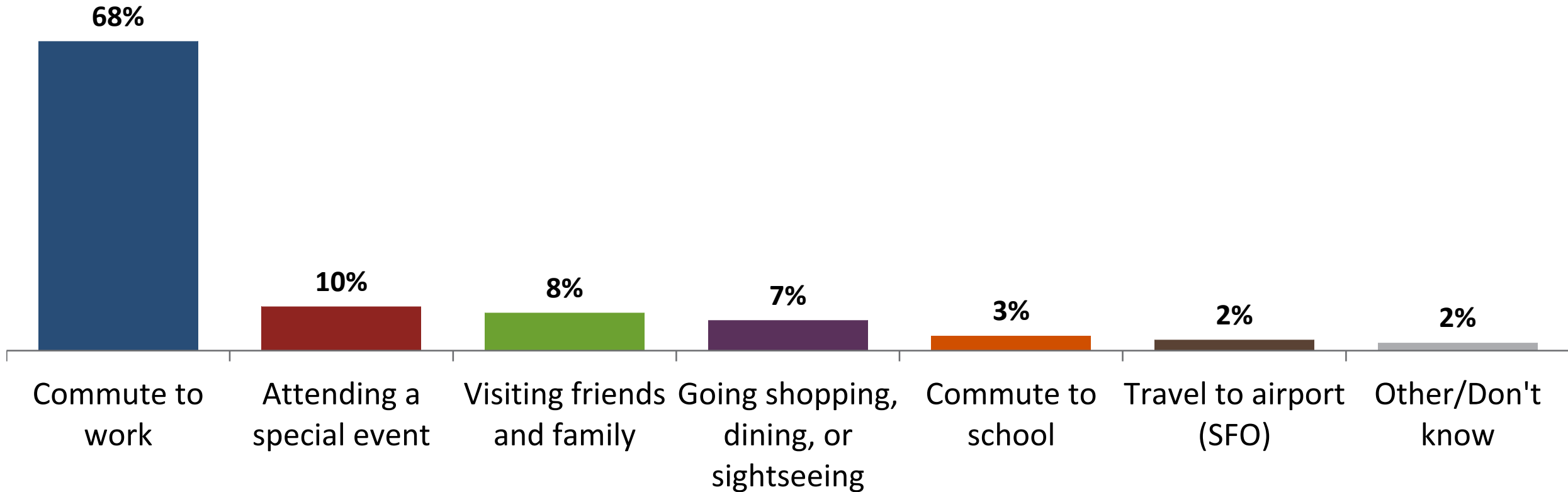


Q44. What is your most common destination station, meaning the one where you get off the train to get where you are going?

* Note: No respondents said that Atherton was their most common destination station.

Most Common Purpose for Riding Caltrain

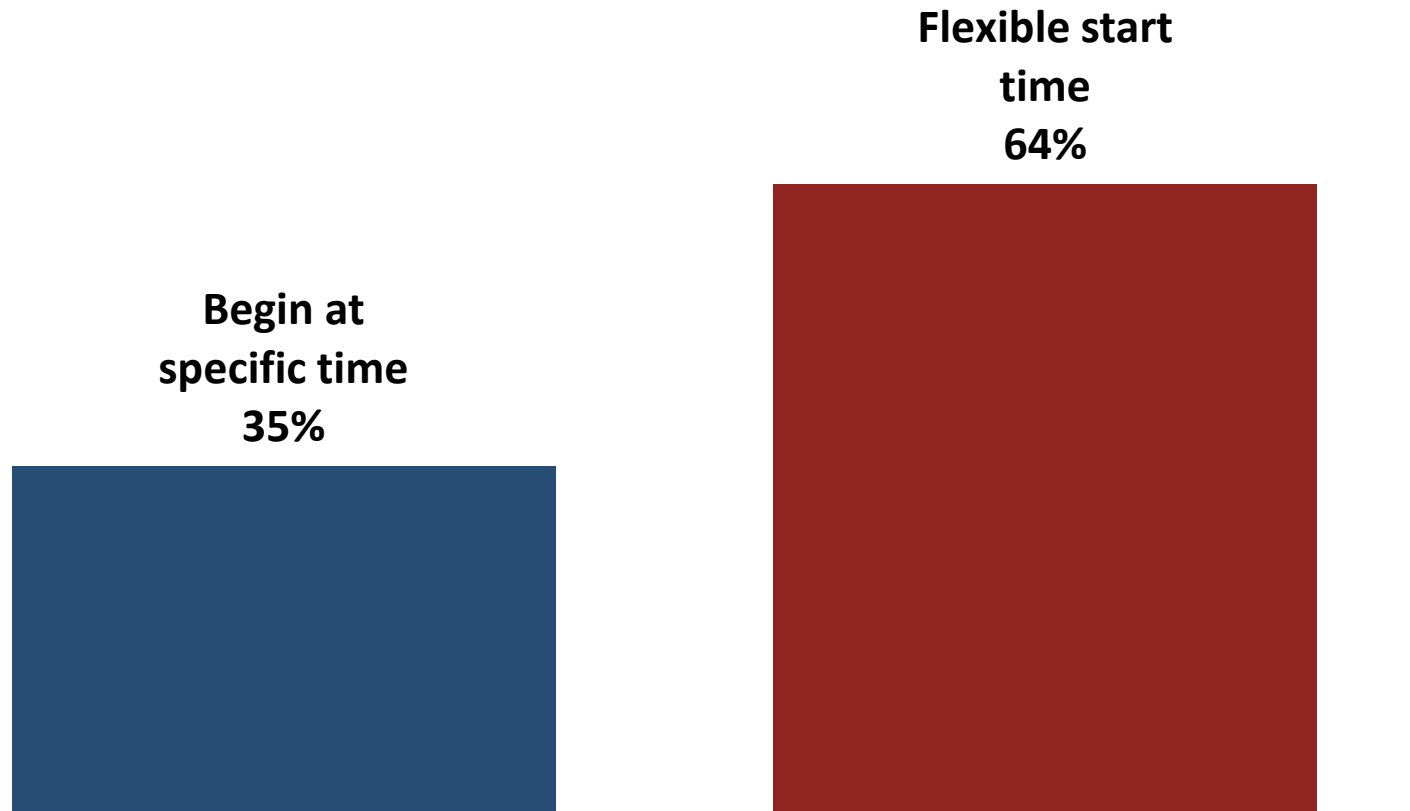
Commuting to work is the most common purpose of riders' trips, followed by attending a special event, and visiting friends and family.



Flexibility in Work Hours

Two-thirds of those who commute to work have a flexible start time at their job. Male and senior commuters are the most likely to have flexible work times, while Hispanics and African-Americans are least likely to have that flexibility.

Asked of respondents who commute to work, n=1293



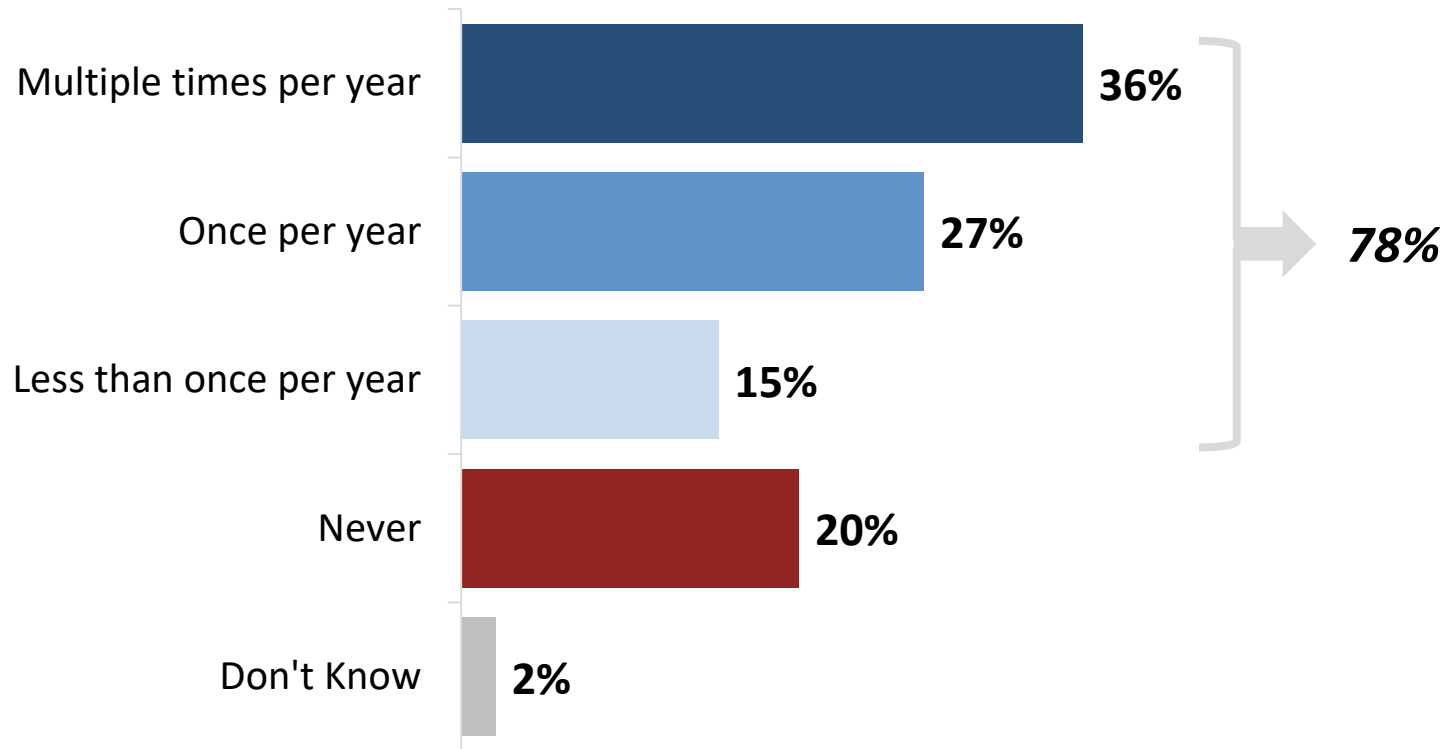
	Begin at specific time	Flexible start time
Overall	35%	64%
Men (55%)	30%	70%
Women (39%)	45%	54%
18-44 (68%)	36%	63%
45-64 (24%)	36%	63%
65+ (8%)	28%	70%
White (46%)	31%	68%
Hispanic or Latino (9%)	51%	49%
Asian (29%)	38%	62%
African-American (2%)	63%	37%
Other (14%)	33%	65%
Homeowner (40%)	34%	66%
Renter/Other (60%)	36%	63%
San Francisco (22%)	34%	65%
San Mateo (31%)	32%	68%
Santa Clara (42%)	38%	62%
Another county (5%)	47%	49%

Q56. On a typical work day, are you required to begin working at a fixed time, or do you have flexibility as to what time you begin working?

Special Event Ridership

More than three-quarters of riders report using Caltrain to travel to a special event, with three out of five using it at least once a year. Giants games, community events, and events at AT&T Park are the most common events travelled to via Caltrain.

How often do you use Caltrain to travel to or from a special event, such as a sporting event or a concert?



In the past year, which events have you traveled to using Caltrain? (If special events rider, n=1418)	
San Francisco Giants games	44%
Community events	25%
Non-sporting events at AT&T Park	19%
Non-sporting events at SAP Center	14%
San Jose Sharks games	13%
Non-sporting events at Levi's Stadium	9%
Stanford football games	8%
San Francisco 49ers games	7%
Visual and performing arts events	5%
San Jose Earthquakes games	4%
Work-related conferences/activities	2%
Non-sporting events at Avaya Stadium	2%
Other athletic events, such as Bay to Breakers	1%
Other	13%
Don't know	3%
None of the above	14%

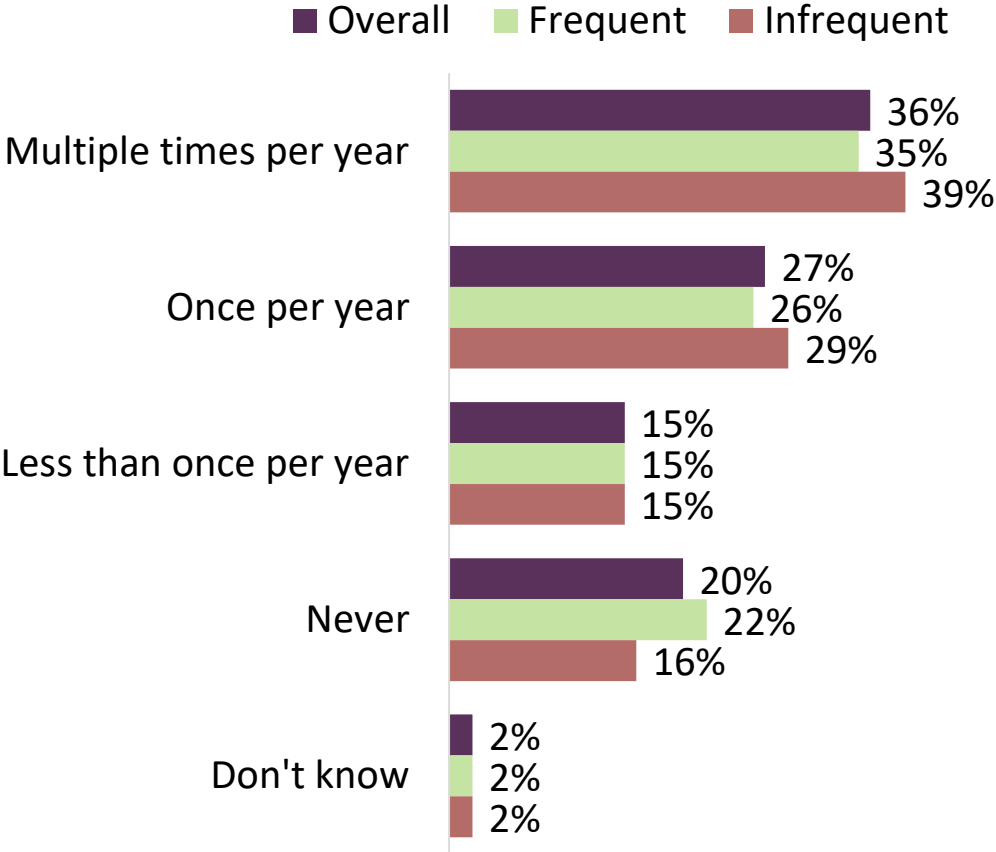
Q60. How often do you use Caltrain to travel to or from a special event, such as a sporting event or a concert?

Q61. In the past year or so, which types of events have you traveled to using Caltrain? Please select all that apply.

Special Event Ridership

Infrequent riders are slightly more likely to use Caltrain to travel to or from a special event.

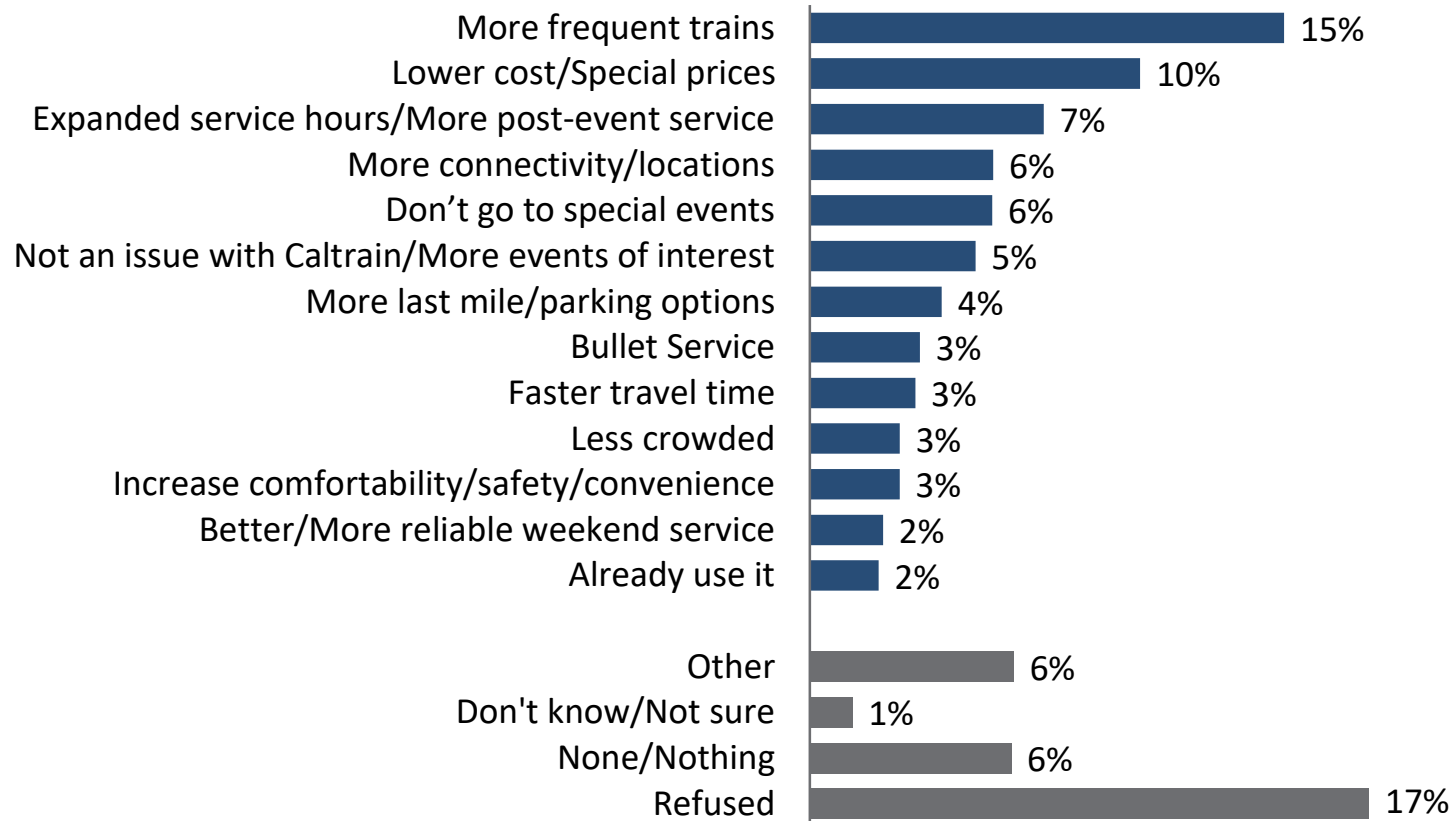
How often do you use Caltrain to travel to or from a special event, such as a sporting event or a concert?



Encourage Special Event Ridership

Similarly, riders say they would be more likely to take Caltrain to special events if there were more frequent trains, or more info about event-specific trains, lower prices for event trains, or if there were expanded hours or more post-event service.

What would encourage you to take Caltrain to special events more often?

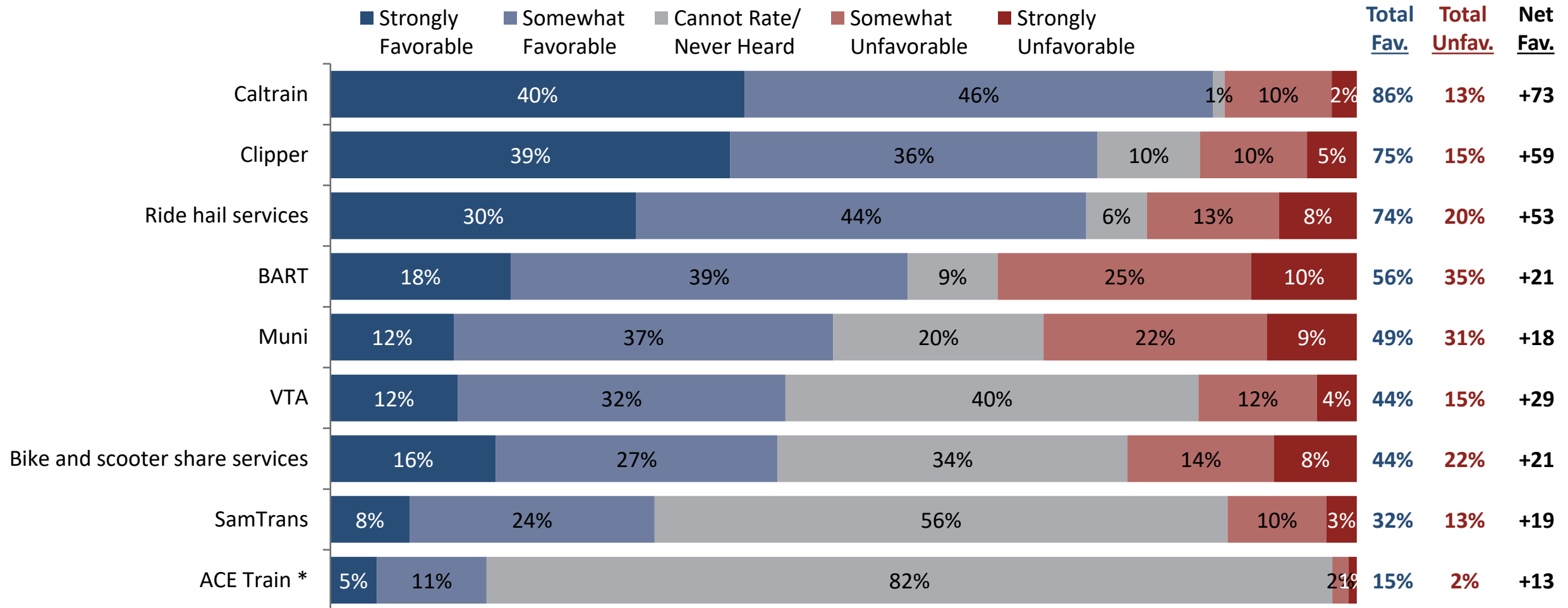




Caltrain Experience & Attributes

Favorable Ratings of Transportation Modes/Agencies

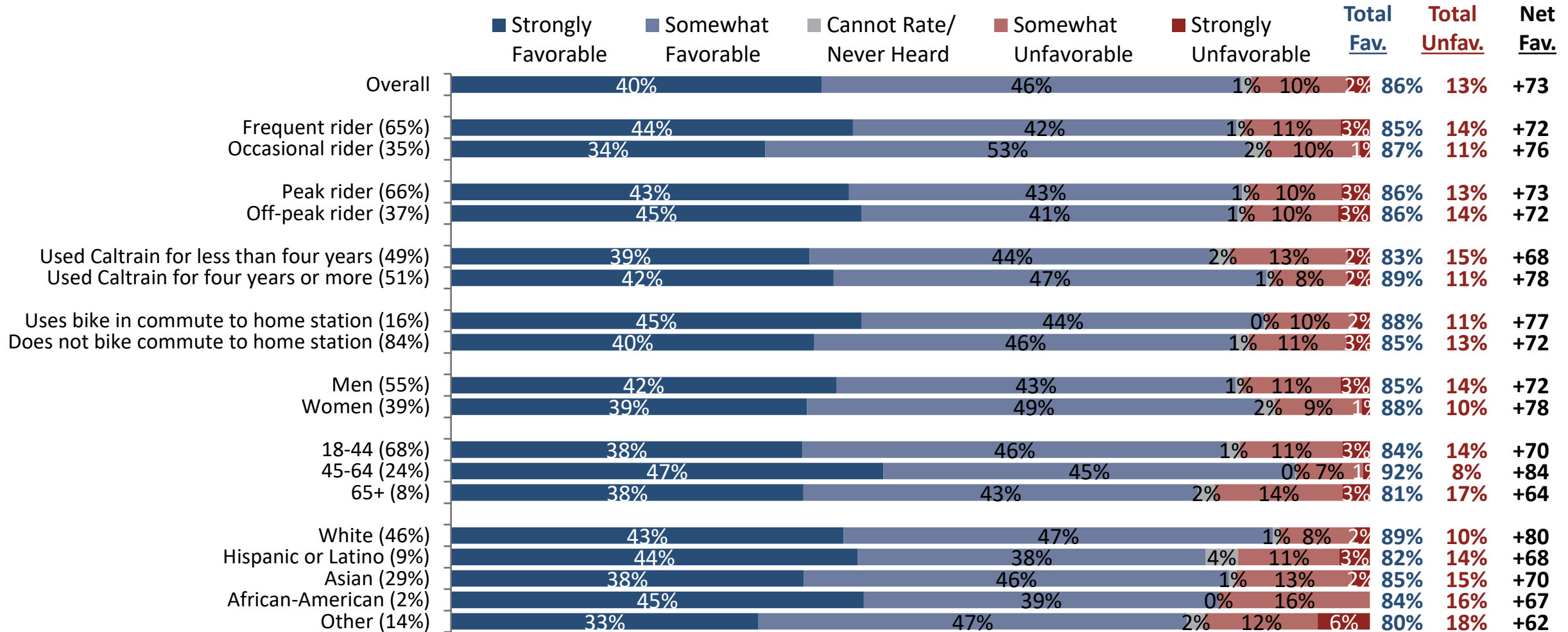
Caltrain enjoys a high favorable rating among its riders. Clipper and ride hail services fare better than other transportation agencies. VTA, SamTrans, and ACE have large numbers of Caltrain riders who cannot rate them.



* Only asked of those who took the online rider survey program; n=1404.

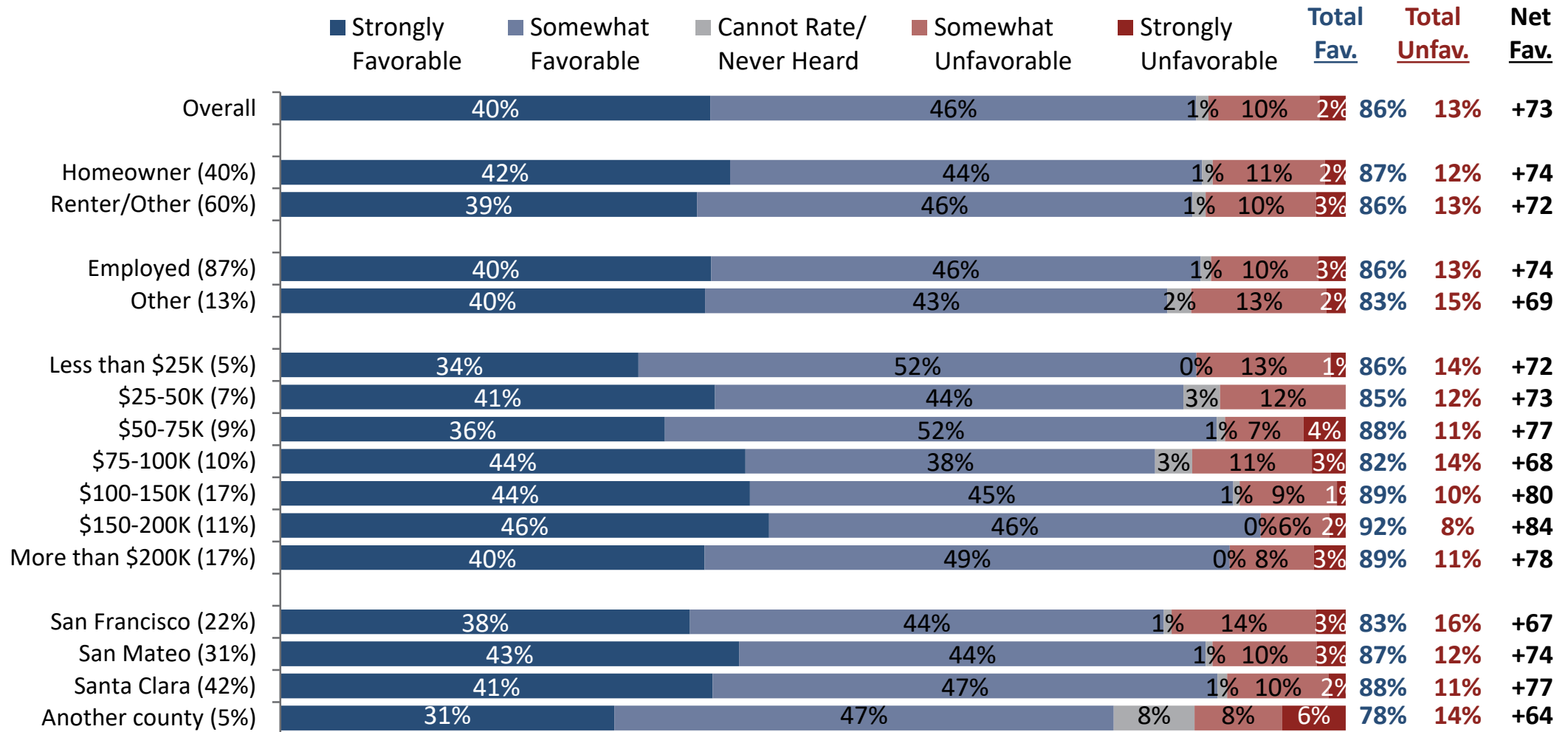
Caltrain Favorable Rating by Subgroups

Frequent riders show more intensity in their favorable ratings of Caltrain, but overall favorable rating is similar between frequent and occasional riders.



Caltrain Favorable Rating by Subgroups

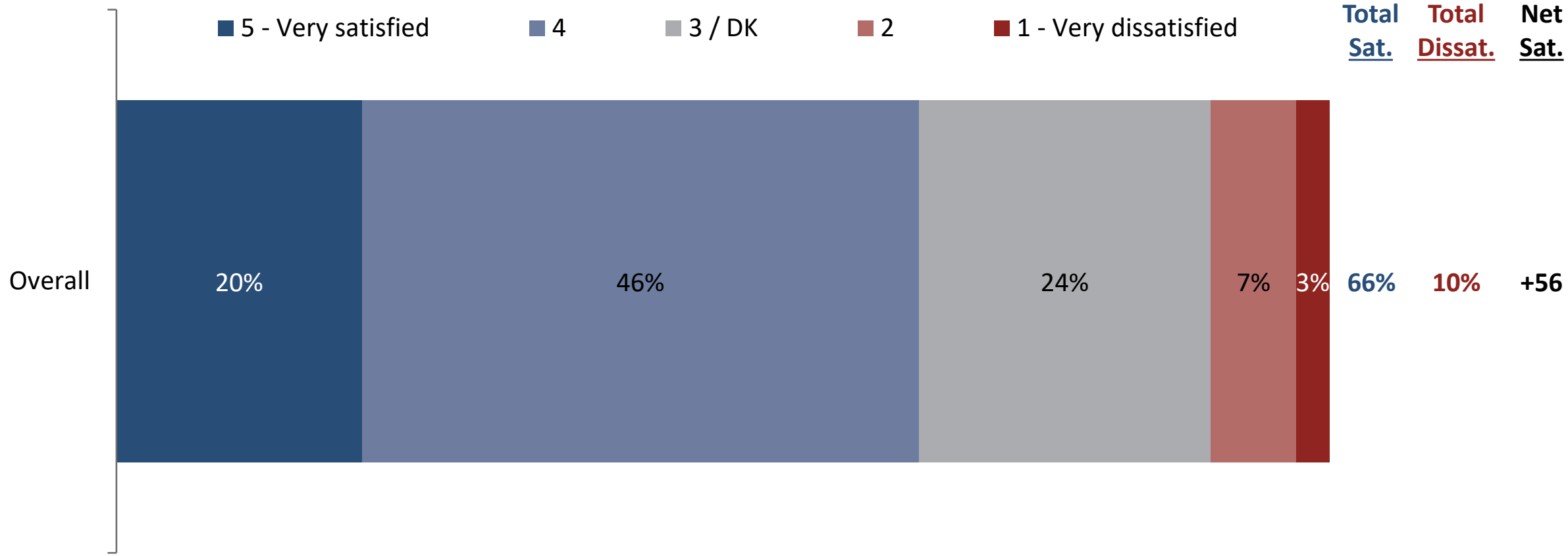
Caltrain receives a high favorable rating across multiple income, employment, and homeownership demographics; respondents from counties outside Caltrain's service area are less likely to offer an opinion.



Overall Caltrain Experience by Demographics

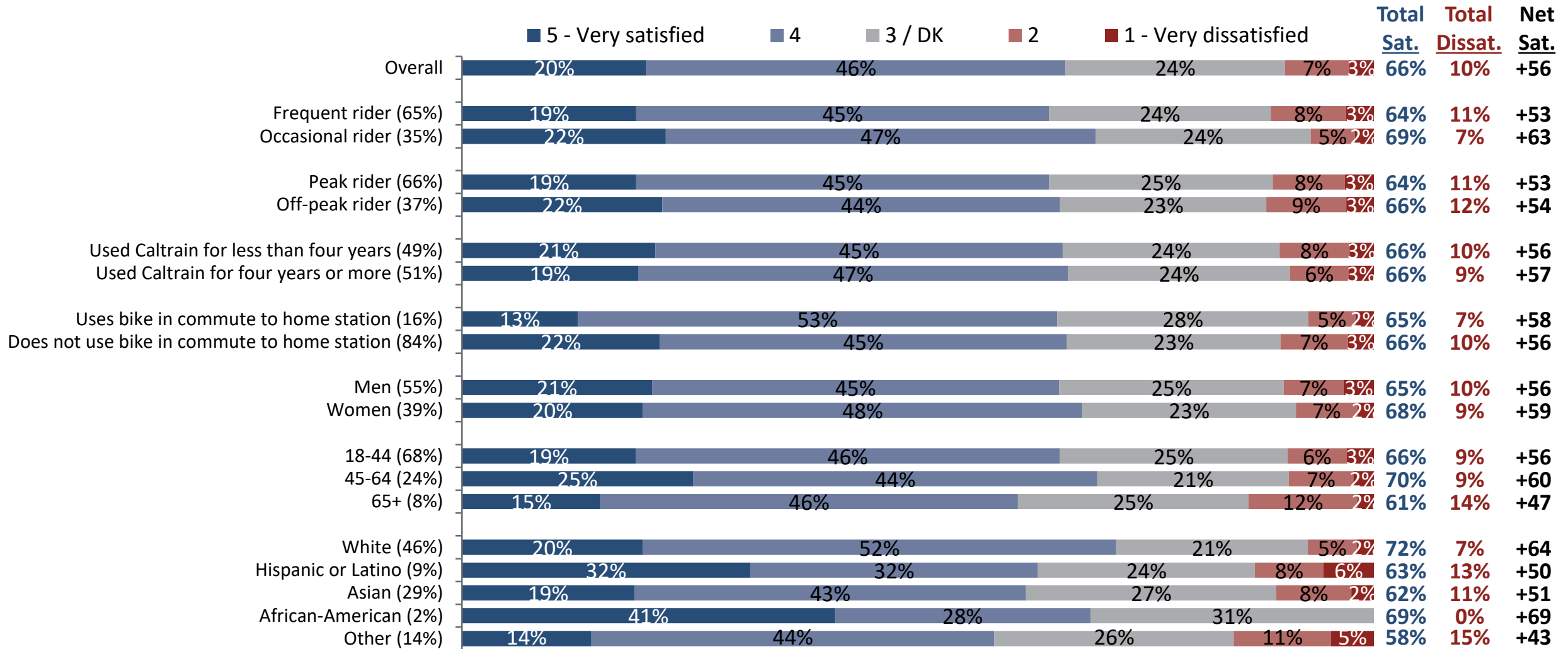


Overall, riders are satisfied with their Caltrain experience, with 66% satisfied with their ridership experience.



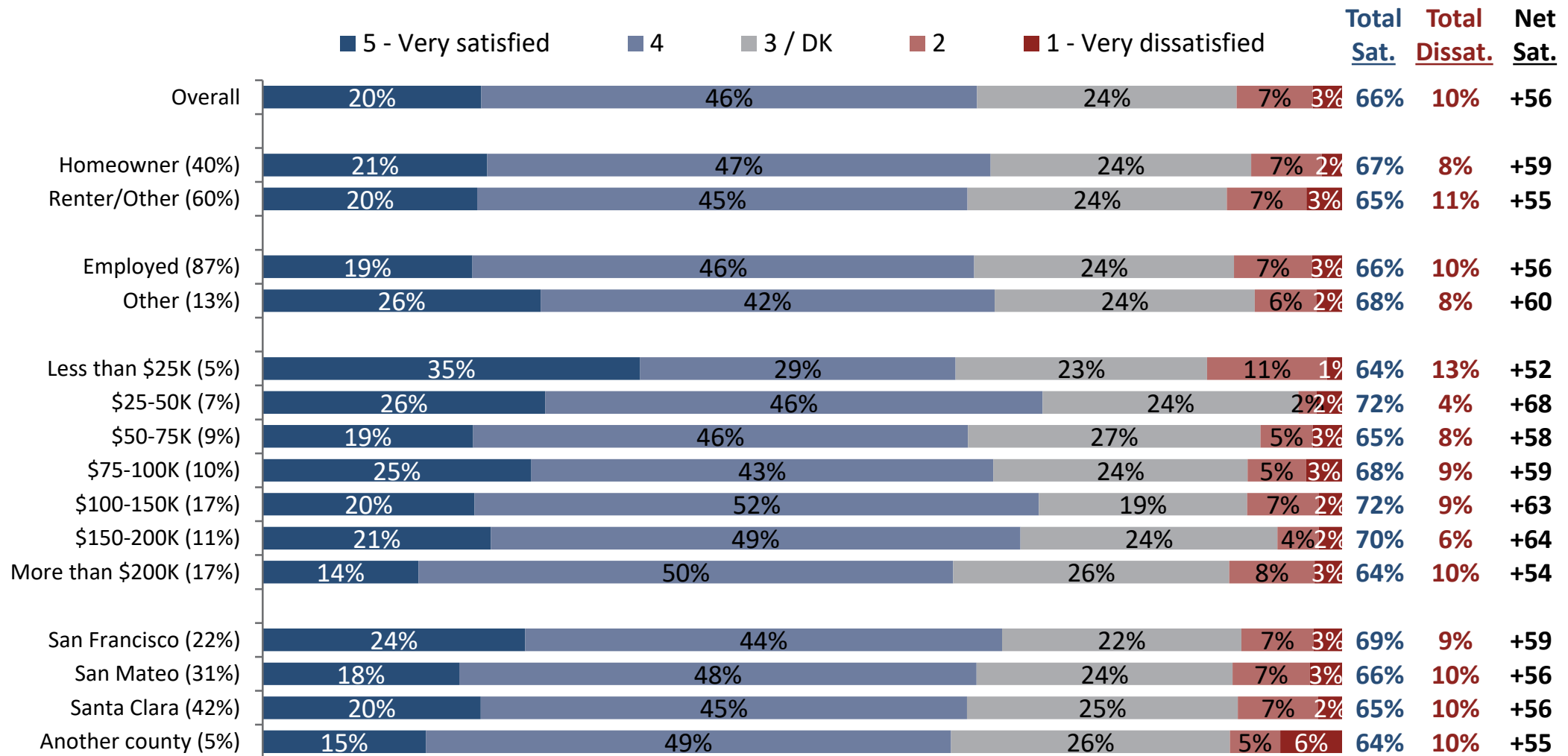
Overall Caltrain Experience by Demographics

Older riders (65+) and those who commute with a bike are slightly less likely to offer a “very satisfied” rating.



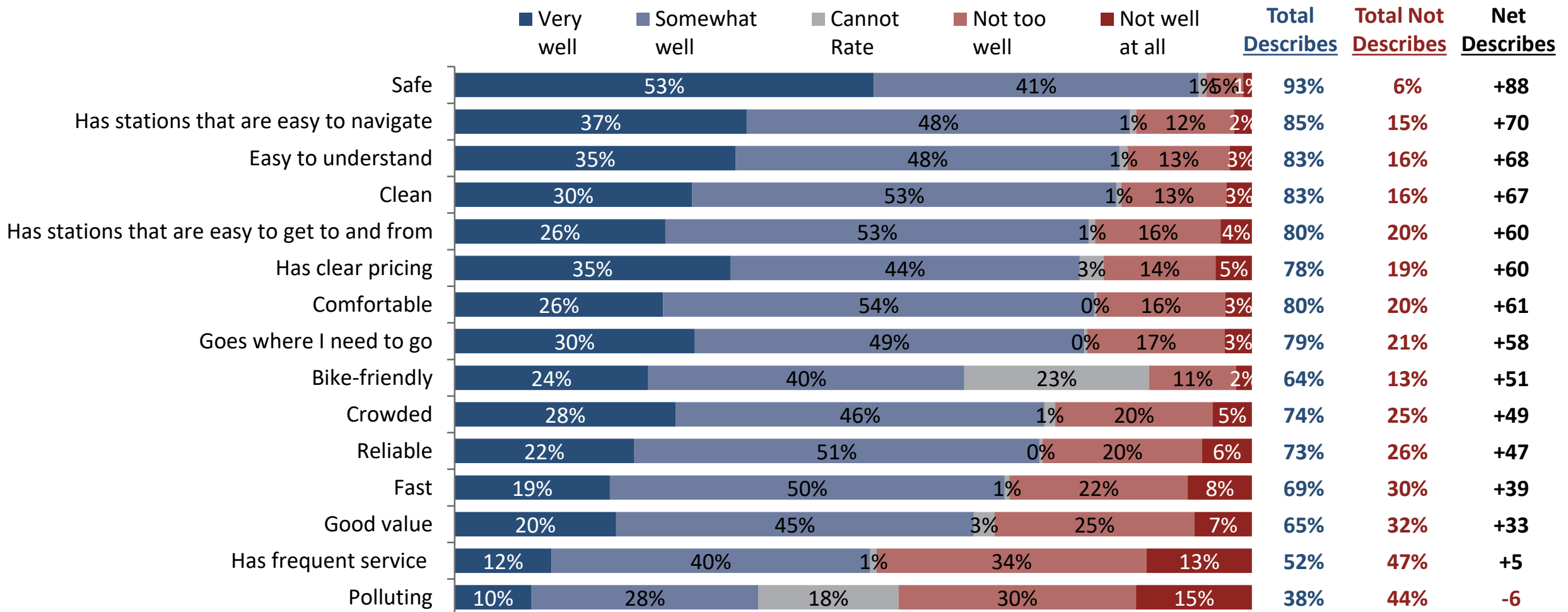
Overall Caltrain Experience by Demographics

Riders from San Francisco and those with lower incomes are most likely to report being “very satisfied” with their Caltrain experience.



Caltrain Attributes

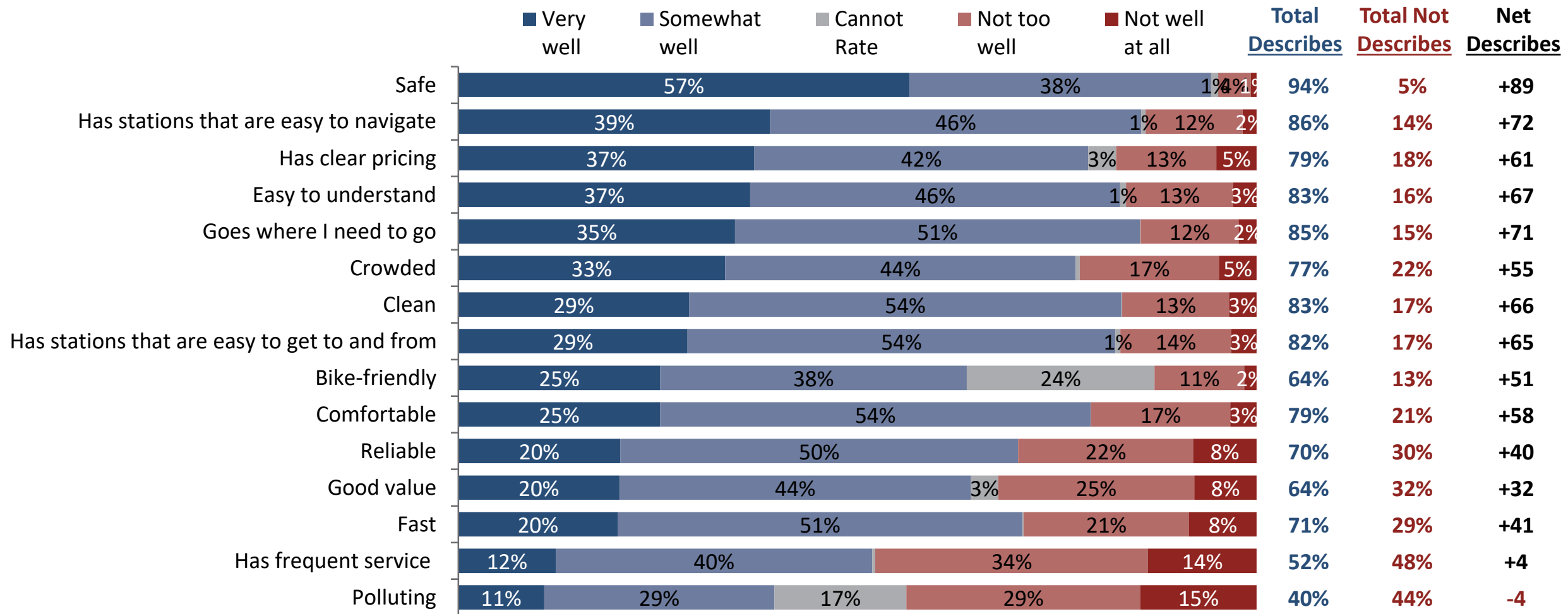
Riders are able to attribute a number of positive attributes to Caltrain, including safe, easy to navigate and understand, and clean. The perception that Caltrain is safe is particularly intensely felt.



Q27-41. For each of the following, please indicate how well that word or phrase describes Caltrain, whether or not you ride Caltrain regularly.

Caltrain Attributes – Peak Riders

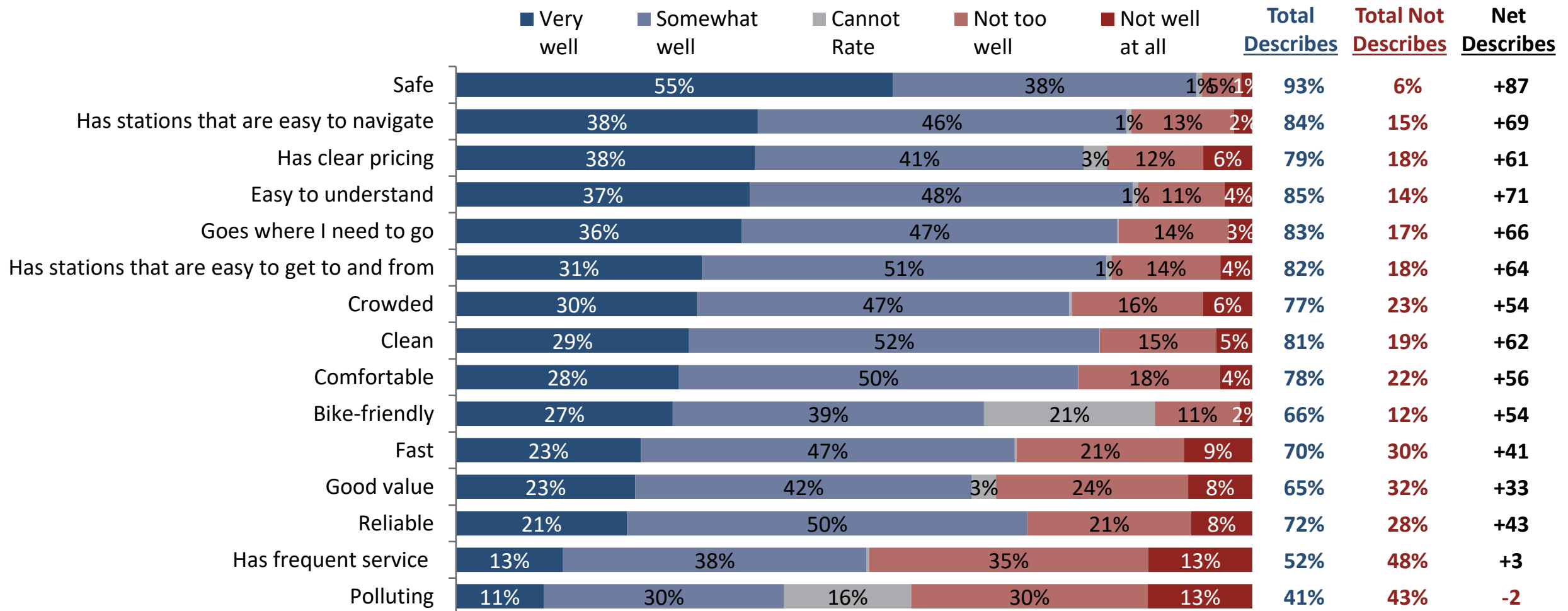
Nearly three out of five peak riders think that “safe” describes Caltrain very well. Nearly half do not think “frequent service” describes the system.



Q27-41. For each of the following, please indicate how well that word or phrase describes Caltrain, whether or not you ride Caltrain regularly.

Caltrain Attributes – Off-Peak Riders

Those who ride Caltrain during off-peak times are equally as likely to rate the system as crowded, compared to those who ride during peak times.

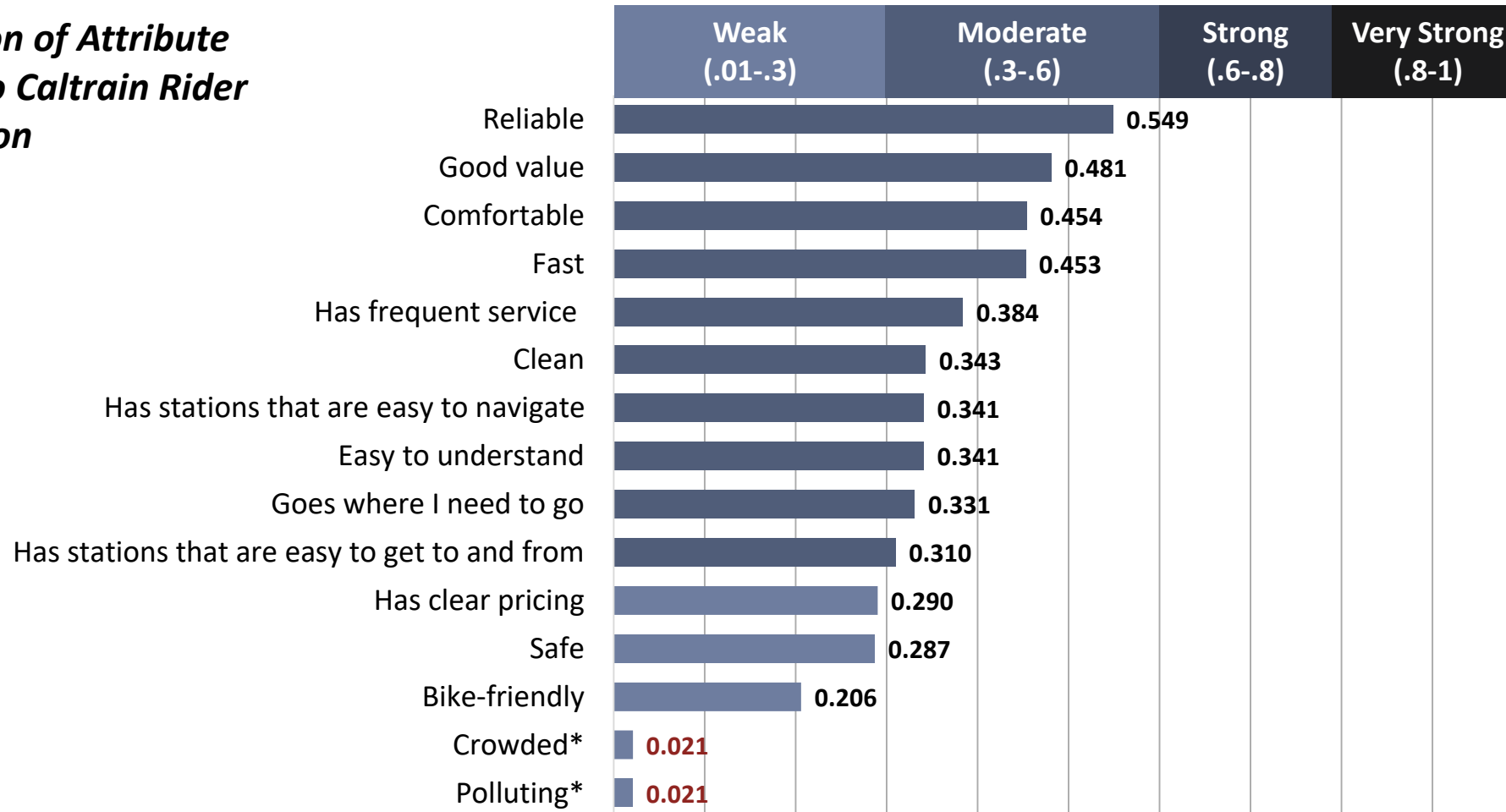


Q27-41. For each of the following, please indicate how well that word or phrase describes Caltrain, whether or not you ride Caltrain regularly.

Correlation: Caltrain Attributes and Satisfaction

The most significant drivers of rider satisfaction are reliability, value, comfort, and speed.

Correlation of Attribute Ratings to Caltrain Rider Satisfaction

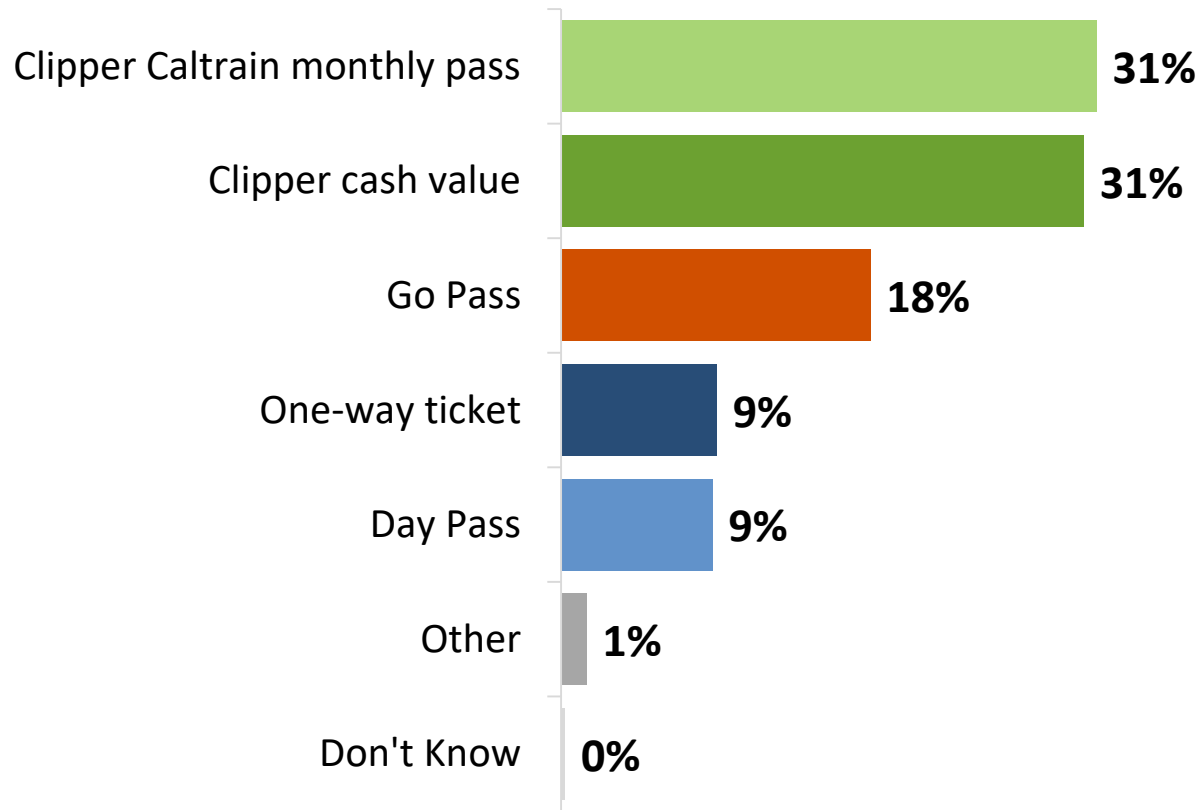


*Negative

Caltrain Ride Payments

Around four in five Caltrain riders paid for their trip using Clipper or Go Pass. Nearly two of three users of Go Pass say they would ride Caltrain less or stop riding altogether if their employer no longer offered the pass.

How do you usually pay for your rides on Caltrain?



If your company no longer offered Go Pass, do you think you would... (If Go Pass, n=345)	
Ride Caltrain about as often as you do now	27%
Ride Caltrain less often than you do now	44%
Stop riding Caltrain	20%
Don't Know	9%

How do you usually purchase your ticket? (If ticket or day pass, n=275)	
At Caltrain ticket vending machine	83%
On the Caltrain mobile app	14%
Other/Don't Know	3%

Q57. How do you usually pay for your rides on Caltrain?

Q58. (IF Q57=Ticket or Day Pass; n=275) How do you usually purchase your Caltrain ticket?

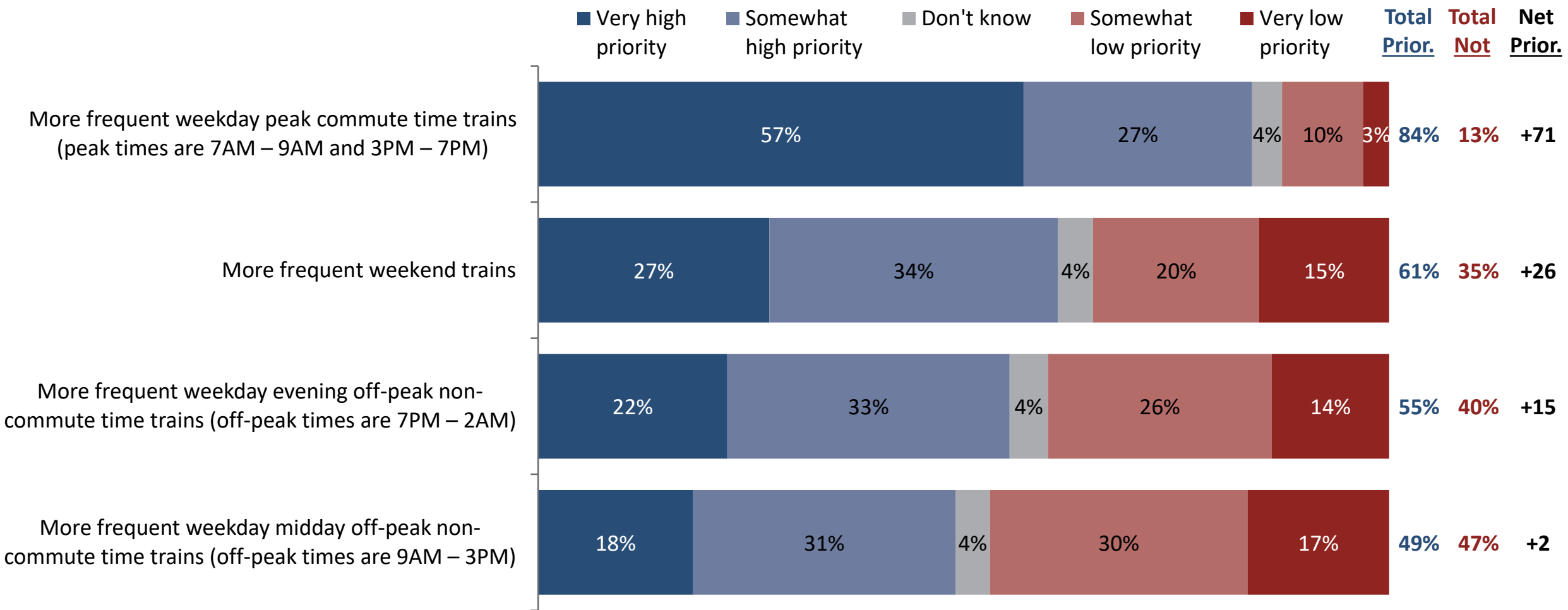
Q59. (IF Q57=Go Pass; n=345) If your company no longer offered a Go Pass, do you think you would...



Caltrain Equipment and Service Changes

Changes to Caltrain Service – Frequency

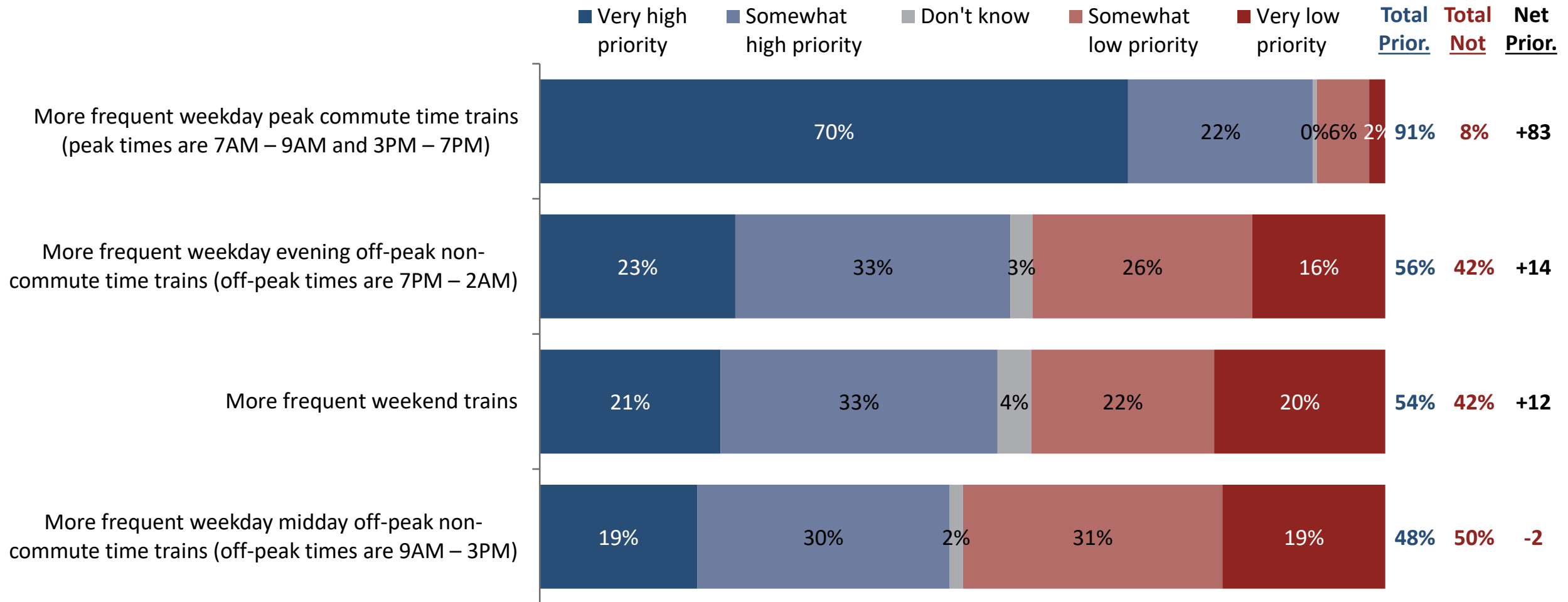
More frequent weekday peak time trains are a very high priority for nearly 60% of Caltrain riders. The least prioritized frequency service change is more midday off-peak trains.



Q81-92. Caltrain is considering a number of changes to improve the service they provide. For each of the following, please indicate how high a priority you think it should be for Caltrain.

Changes to Caltrain Service – Frequency: Peak Riders

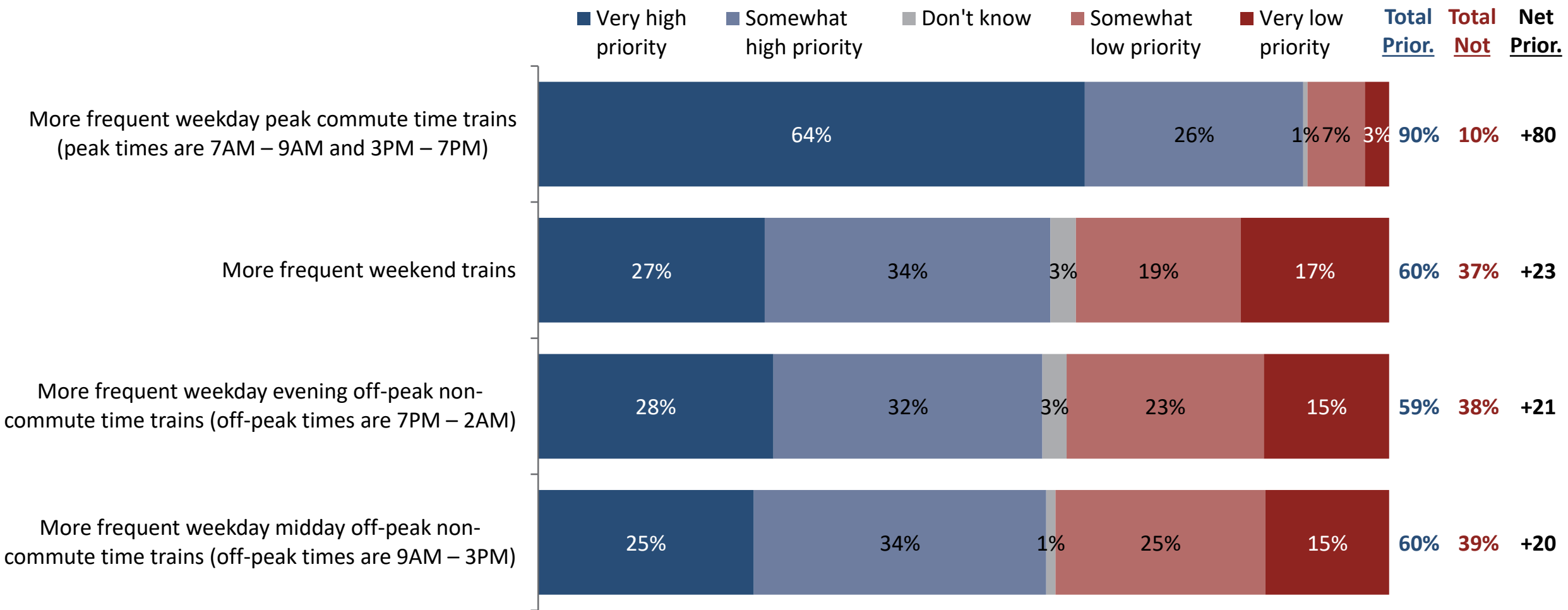
Peak riders are more likely than riders overall to prioritize more frequent peak commute hour trains.



Q81-84. Caltrain is considering a number of changes to improve the service they provide. For each of the following, please indicate how high a priority you think it should be for Caltrain.

Changes to Caltrain Service – Frequency: Off-Peak Riders

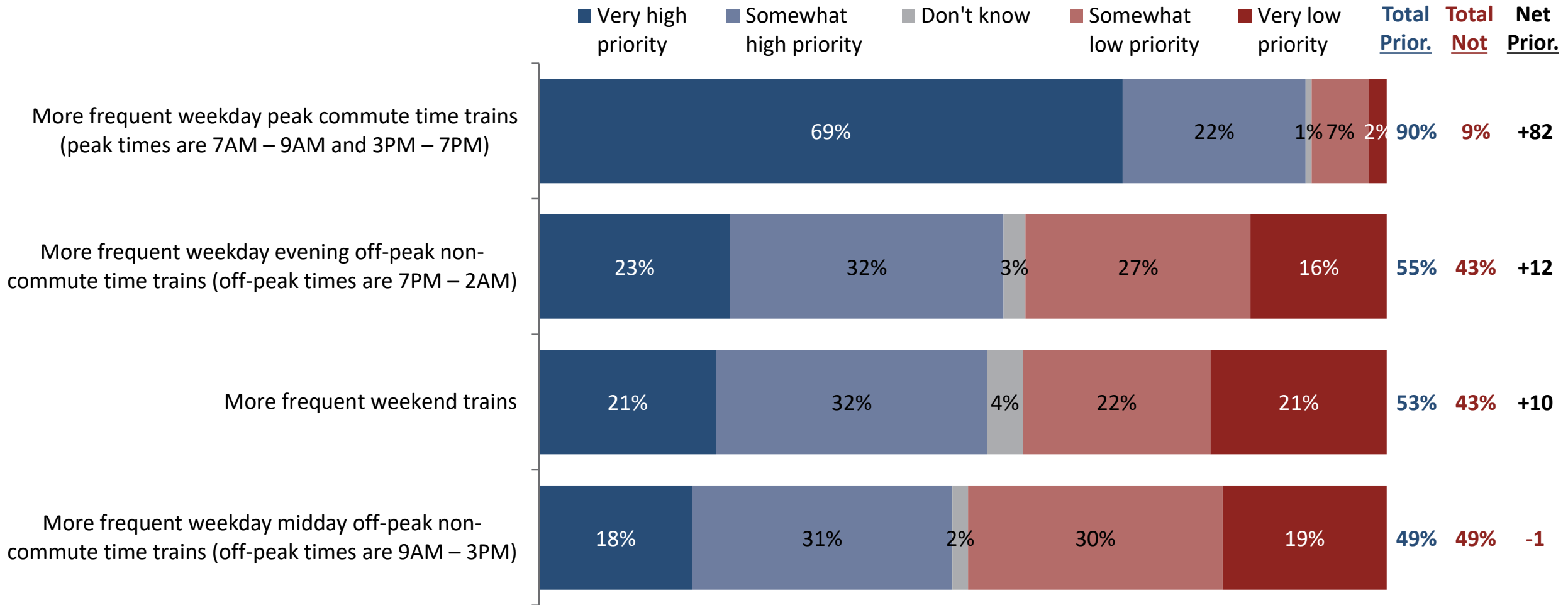
Off-peak riders are more likely to prioritize weekday evening off-peak and weekday midday off-peak trains.



Q81-84. Caltrain is considering a number of changes to improve the service they provide. For each of the following, please indicate how high a priority you think it should be for Caltrain.

Changes to Caltrain Service – Frequency: Frequent Riders

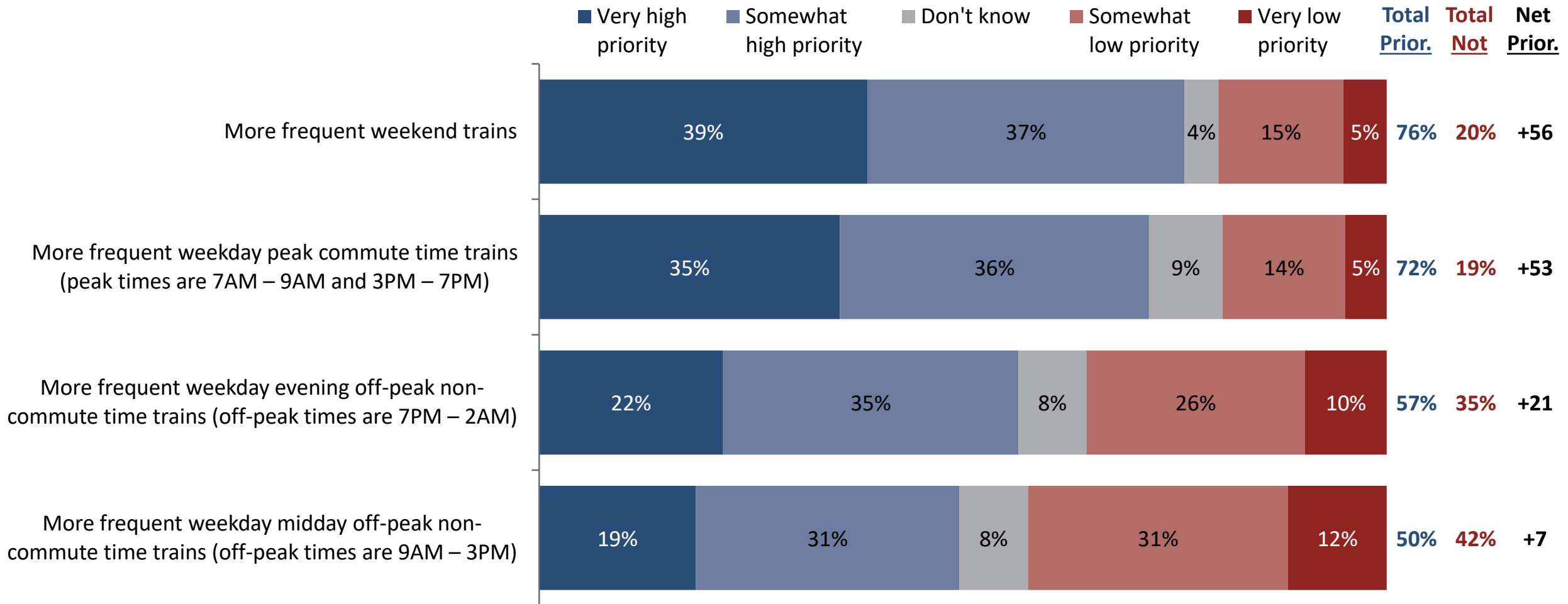
Frequent riders are more likely than overall riders to prioritize more frequent peak weekday service.



Q81-84. Caltrain is considering a number of changes to improve the service they provide. For each of the following, please indicate how high a priority you think it should be for Caltrain.

Changes to Caltrain Service – Frequency: Occasional Riders

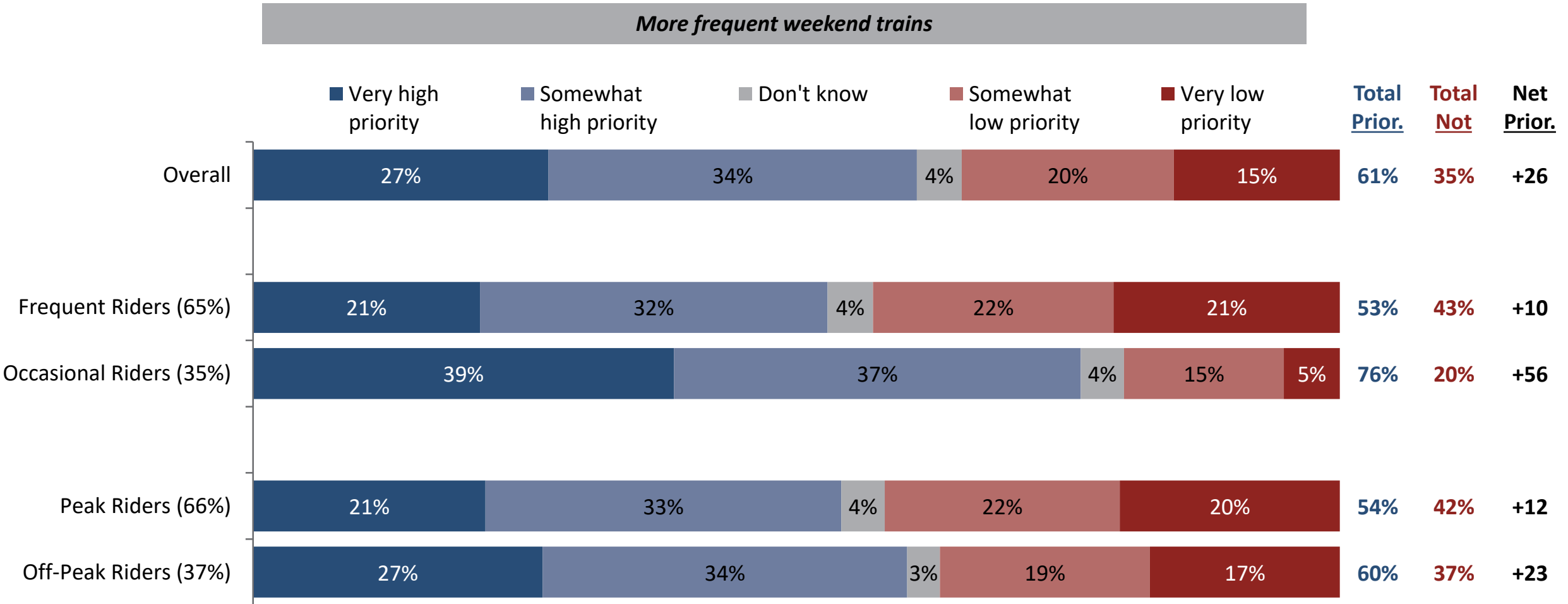
Occasional riders prioritize more frequent weekend trains more than riders overall.



Q81-84. Caltrain is considering a number of changes to improve the service they provide. For each of the following, please indicate how high a priority you think it should be for Caltrain.

More Weekend Trains

While all riders are more likely to prioritize more frequent weekend trains, occasional and off-peak riders rate this improvement as a higher priority than frequent and peak riders.

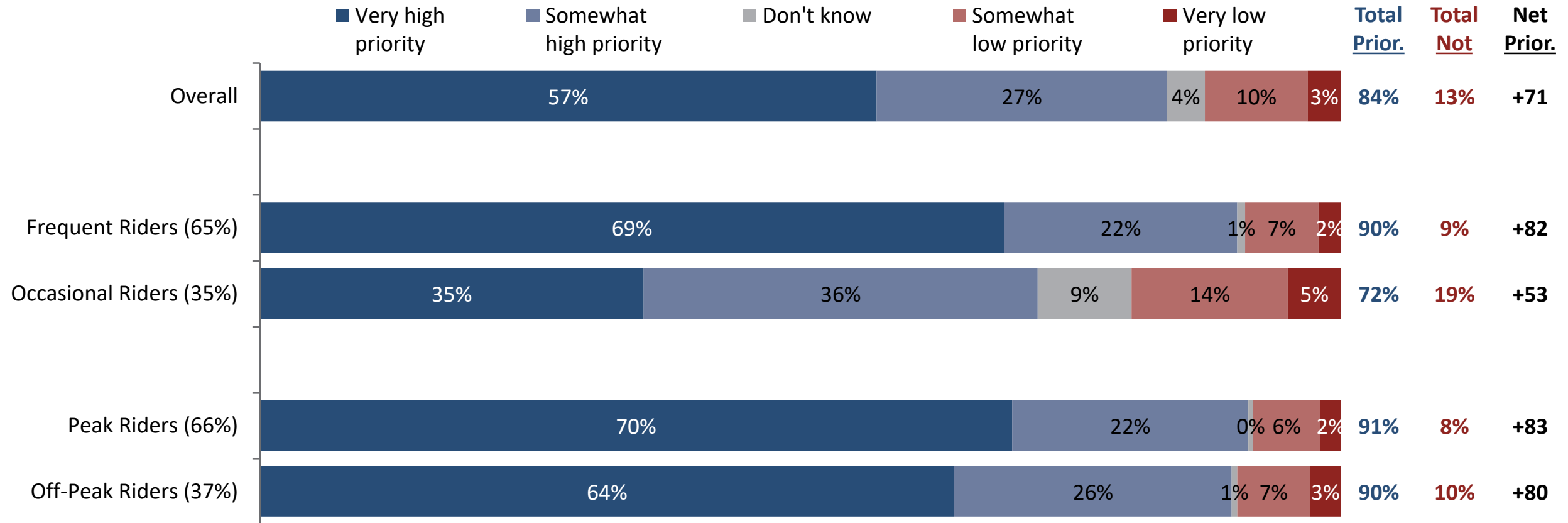


Q81. Please indicate how high a priority you think it should be for Caltrain:
More frequent weekend trains

More Weekday Peak Commute Trains

Frequent riders are much more likely than occasional riders to prioritize more frequent weekday peak trains. The difference between peak riders and off-peak riders is small.

More frequent weekday peak commute time trains (peak times are 7AM – 9AM and 3PM – 7PM)

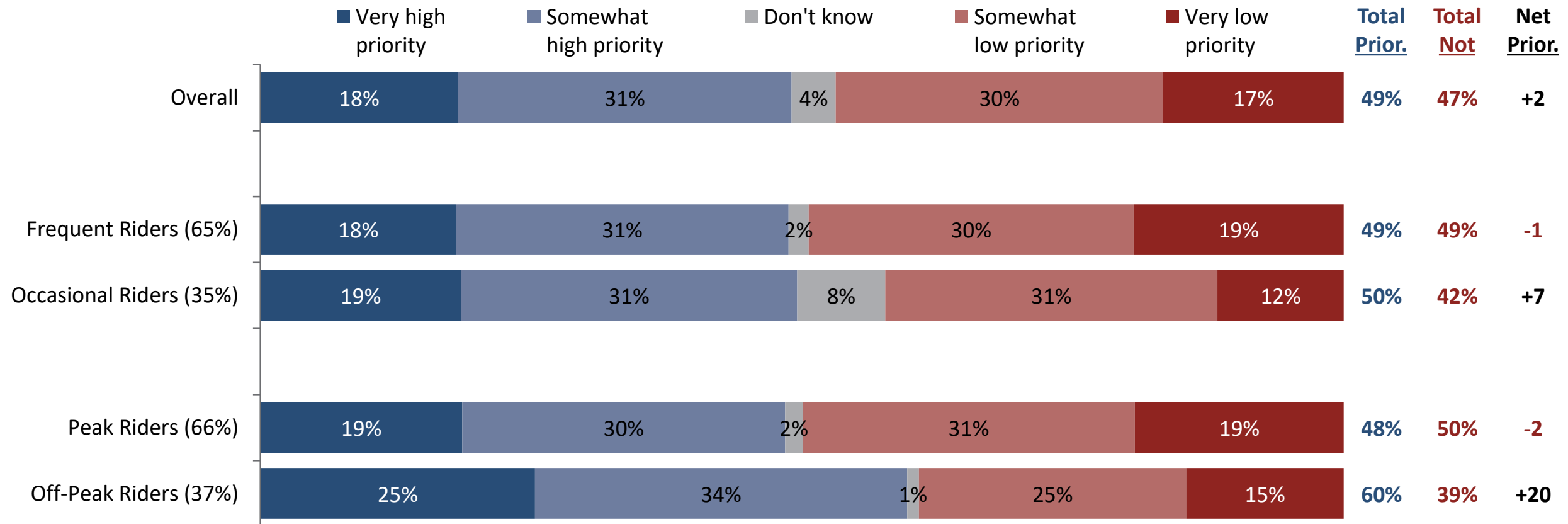


Q82. Please indicate how high a priority you think it should be for Caltrain:
More frequent weekday peak commute time trains (peak times are 7AM – 9AM and 3PM – 7PM)

More Weekday Midday Trains

Off-peak riders are more likely to prioritize more frequent weekday midday off-peak trains, while it is a priority for half of peak riders. There is little difference because rider frequency.

More frequent weekday midday off-peak non-commute time trains (off-peak times are 9AM – 3PM)

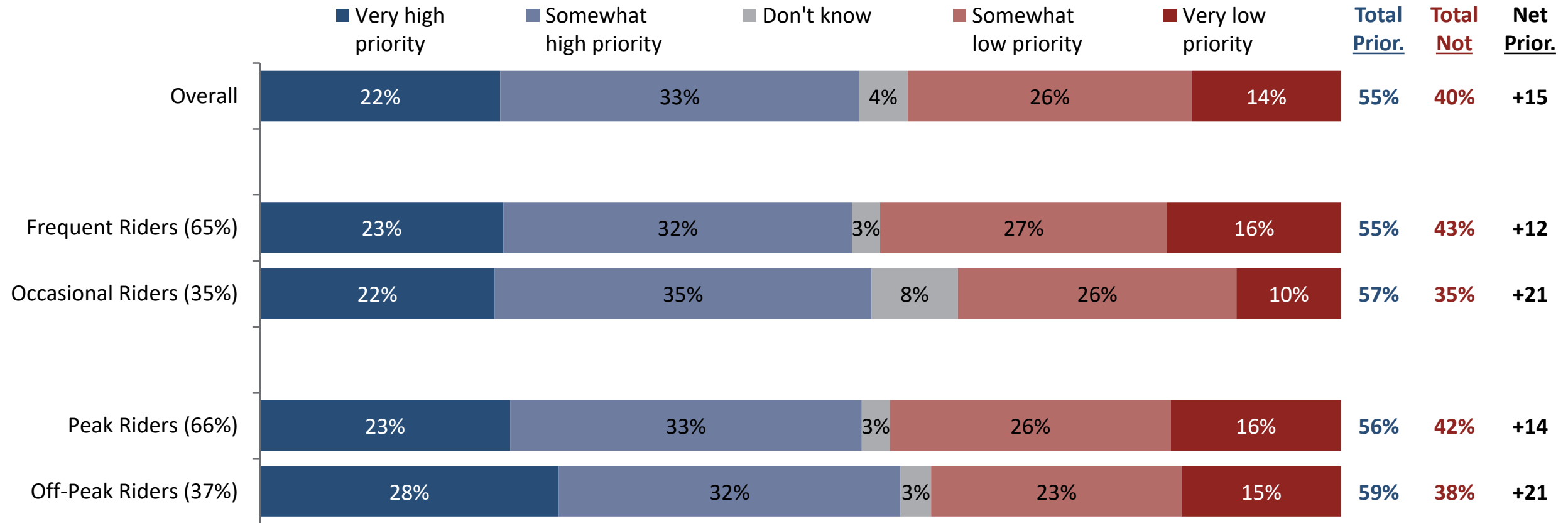


Q83. Please indicate how high a priority you think it should be for Caltrain:
More frequent weekday midday off-peak non-commute time trains (off-peak times are 9AM – 3PM)

More Weekday Evening Trains

Occasional and off-peak riders are slightly more likely than frequent and peak riders to indicate that more weekday evening trains are a priority.

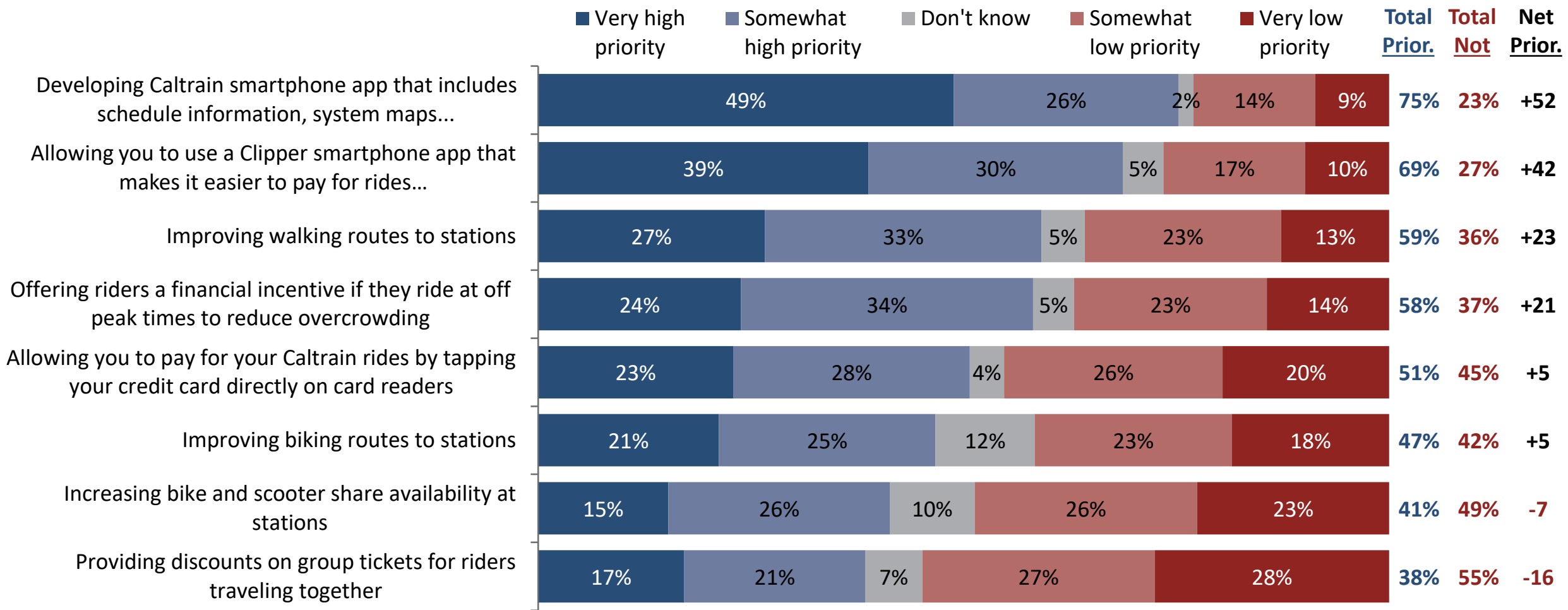
More frequent weekday evening off-peak non-commute time trains (off-peak times are 7PM – 2AM)



Q84. Please indicate how high a priority you think it should be for Caltrain:
More frequent weekday evening off-peak non-commute time trains (off-peak times are 7PM – 2AM)

Changes to Caltrain Service and Stations

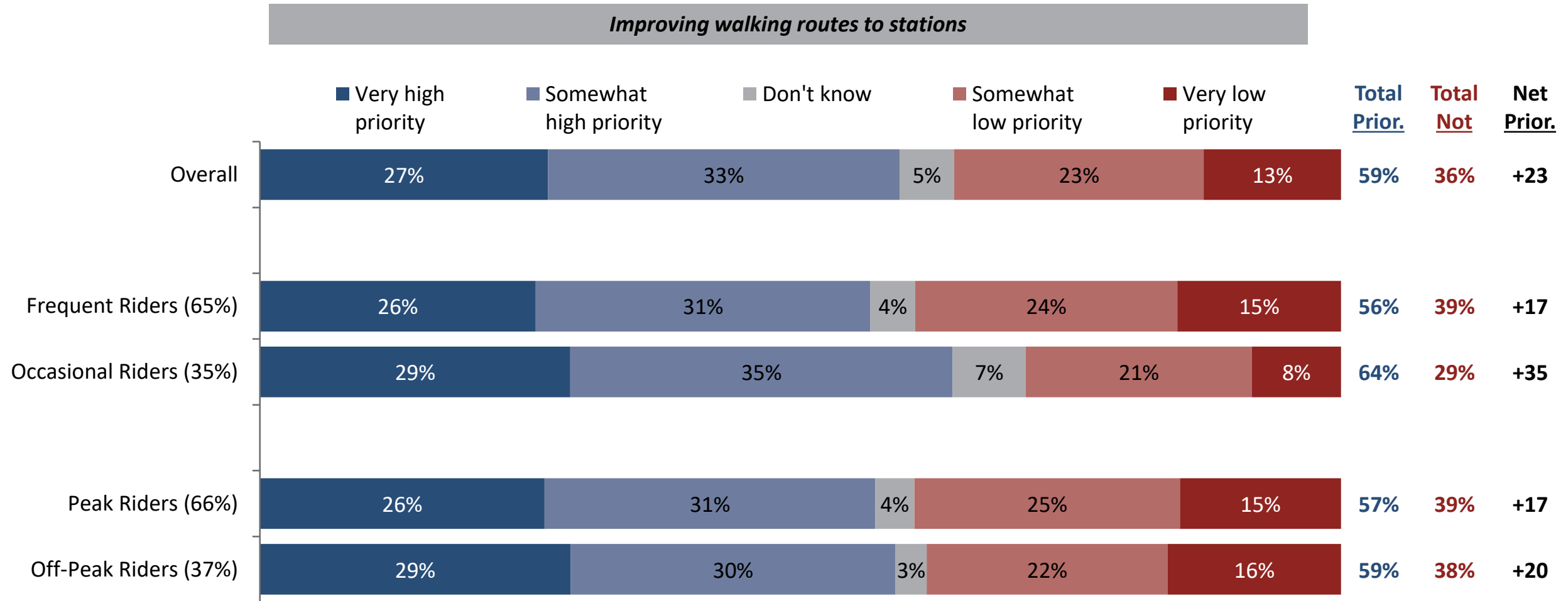
A Caltrain app is a very high priority for nearly half of riders, and nearly two in five highly prioritize a Clipper app. Riders are not prioritizing increased bike and scooter share, or offering groups discounts for tickets.



Q81-92. Caltrain is considering a number of changes to improve the service they provide. For each of the following, please indicate how high a priority you think it should be for Caltrain.

Improving Walking Routes

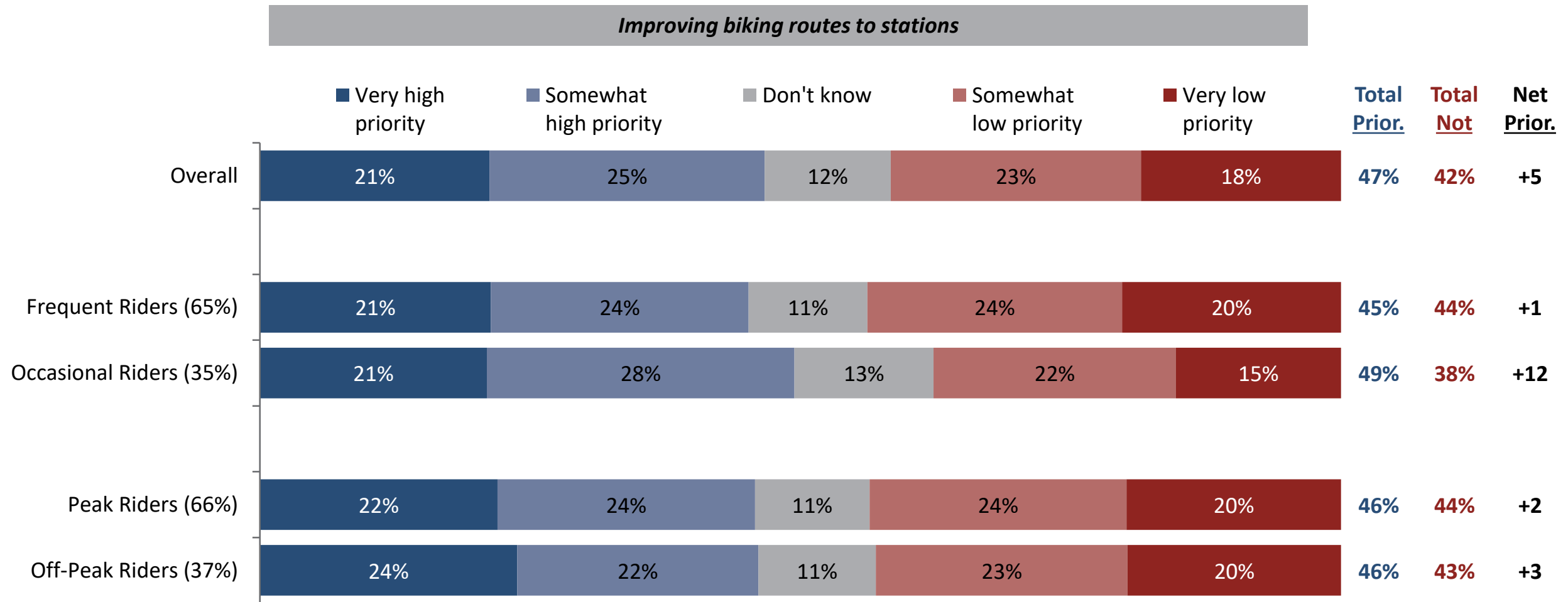
Roughly three-fifths of riders view improving walking routes to stations as a priority. Occasional riders are more likely to prioritize this improvement.



Q85. Please indicate how high a priority you think it should be for Caltrain:
Improving walking routes to stations

Improving Biking Routes

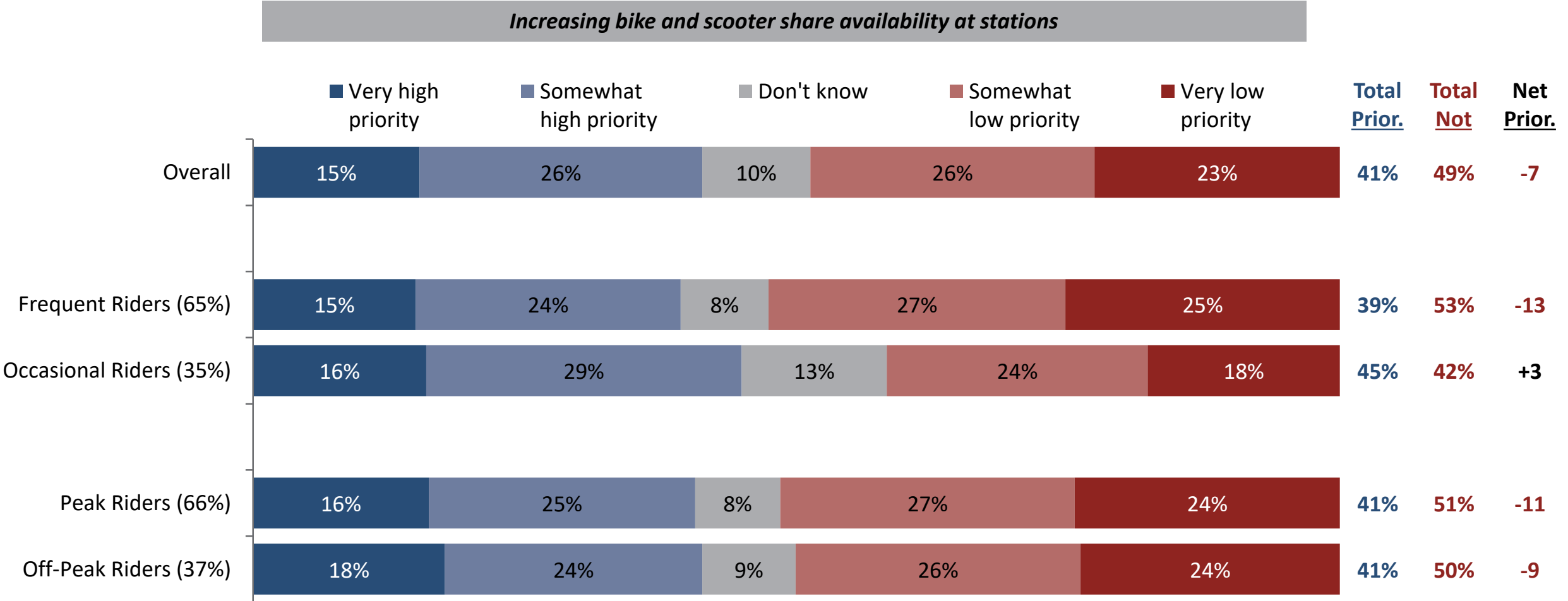
Riders are split on prioritizing bike routes to stations, although occasional riders are more likely to prioritize it.



Q86. Please indicate how high a priority you think it should be for Caltrain:
Improving biking routes to stations

Increasing Bike/Scooter Availability

Increasing bike and scooter share availability at stations is not a top priority for many riders.

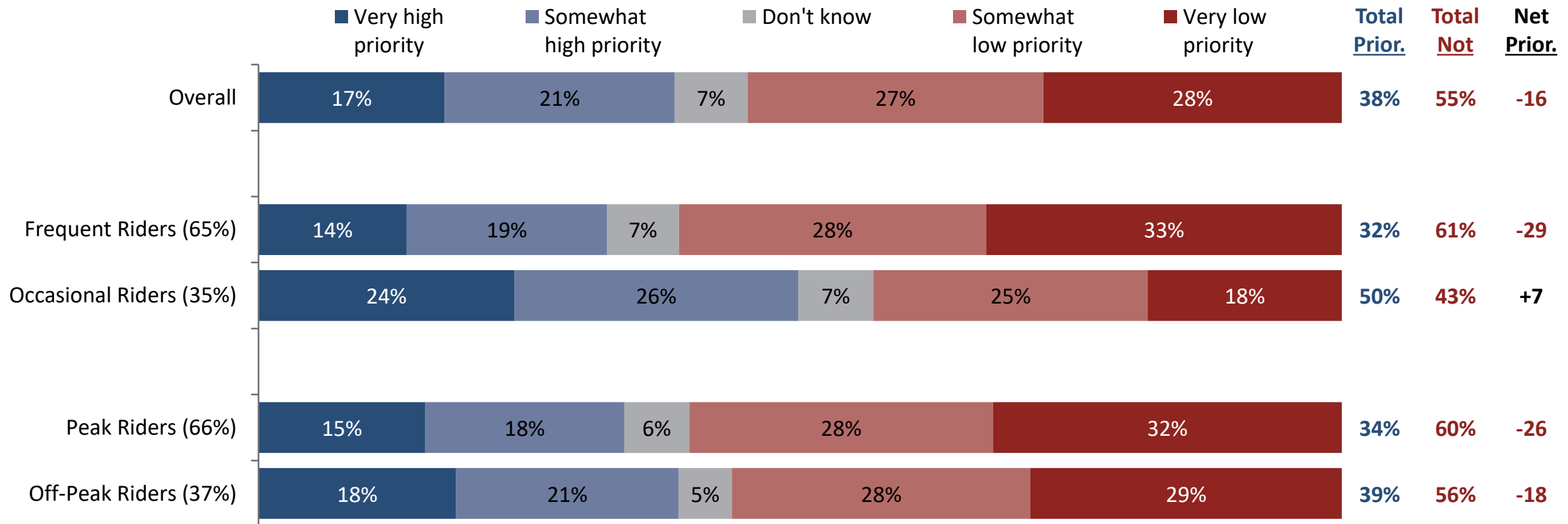


Q87. Please indicate how high a priority you think it should be for Caltrain:
Increasing bike and scooter share availability at stations

Providing Discounts on Group Tickets

Half of occasional riders prioritize discounts on group tickets for riders travelling together.

Providing discounts on group tickets for riders traveling together

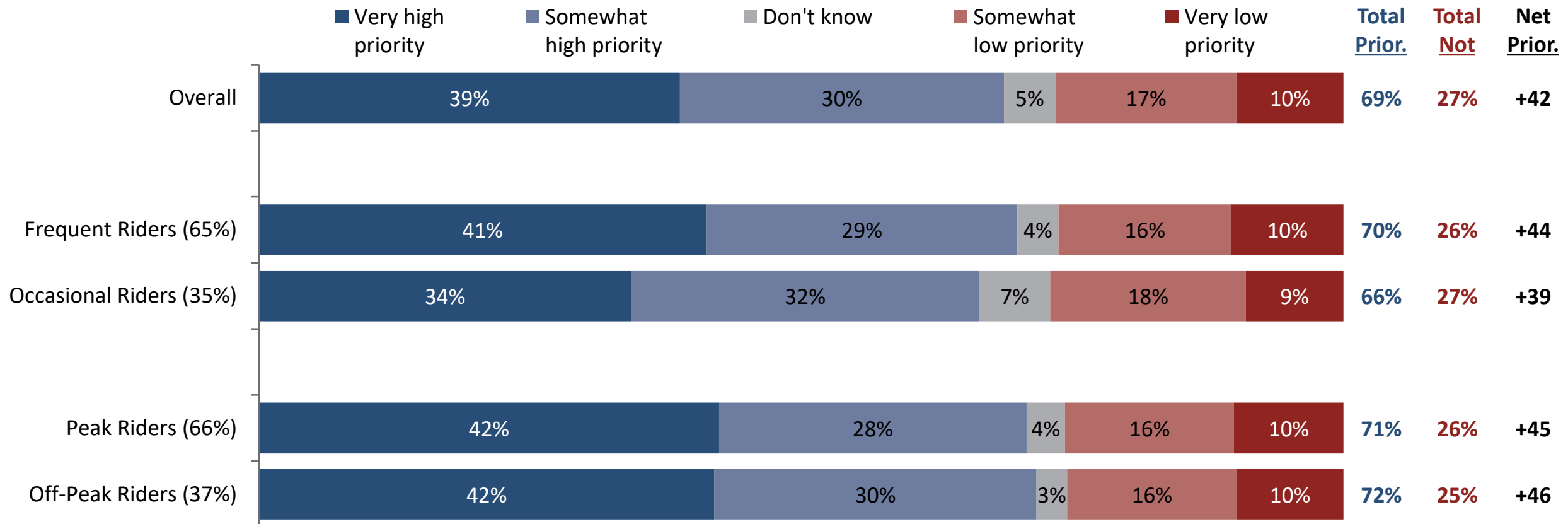


Q88. Please indicate how high a priority you think it should be for Caltrain:
Providing discounts on group tickets for riders traveling together

Clipper App to Pay for Rides and Load Value

Roughly two-fifths of all riders view a Clipper smartphone app as a very high priority. Frequent riders are more likely to prioritize this improvement.

Allowing you to use a Clipper smartphone app that makes it easier to pay for rides and load cash value and passes



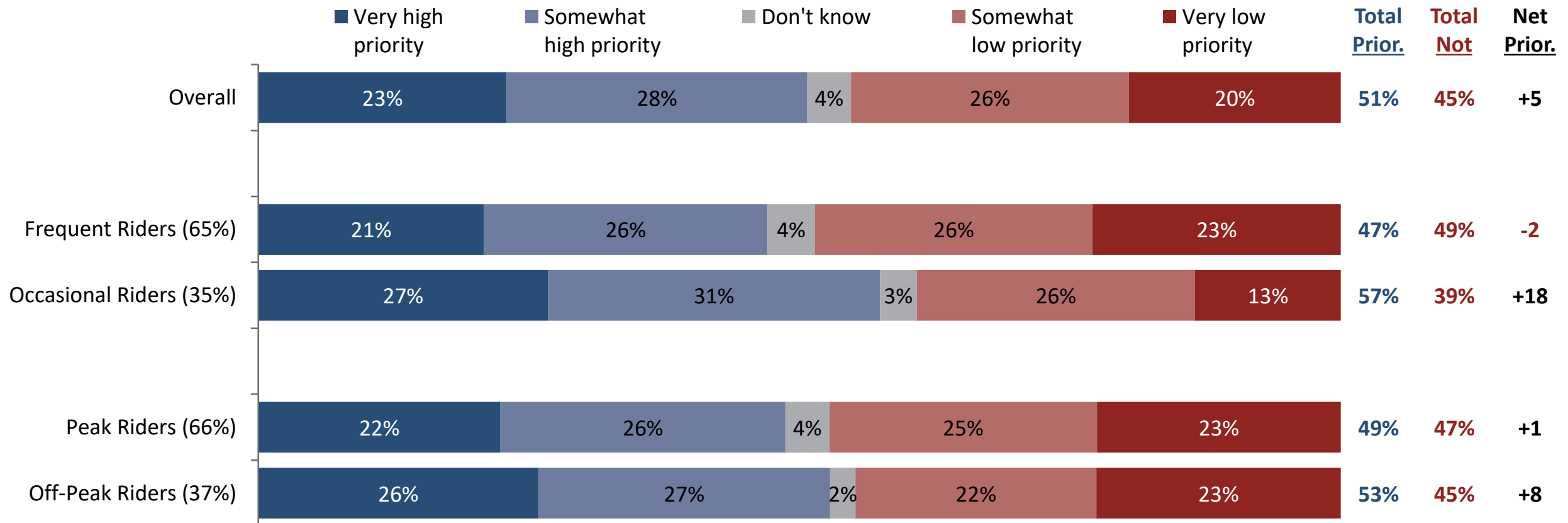
Q89. Please indicate how high a priority you think it should be for Caltrain:

Allowing you to use a Clipper smartphone app that makes it easier to pay for rides and load cash value and passes

Tapping Credit Card Directly on Readers

Frequent riders are less likely to say that paying for rides by tapping their credit card on the readers is a priority.

Allowing you to pay for your Caltrain rides by tapping your credit card directly on card readers at the stations

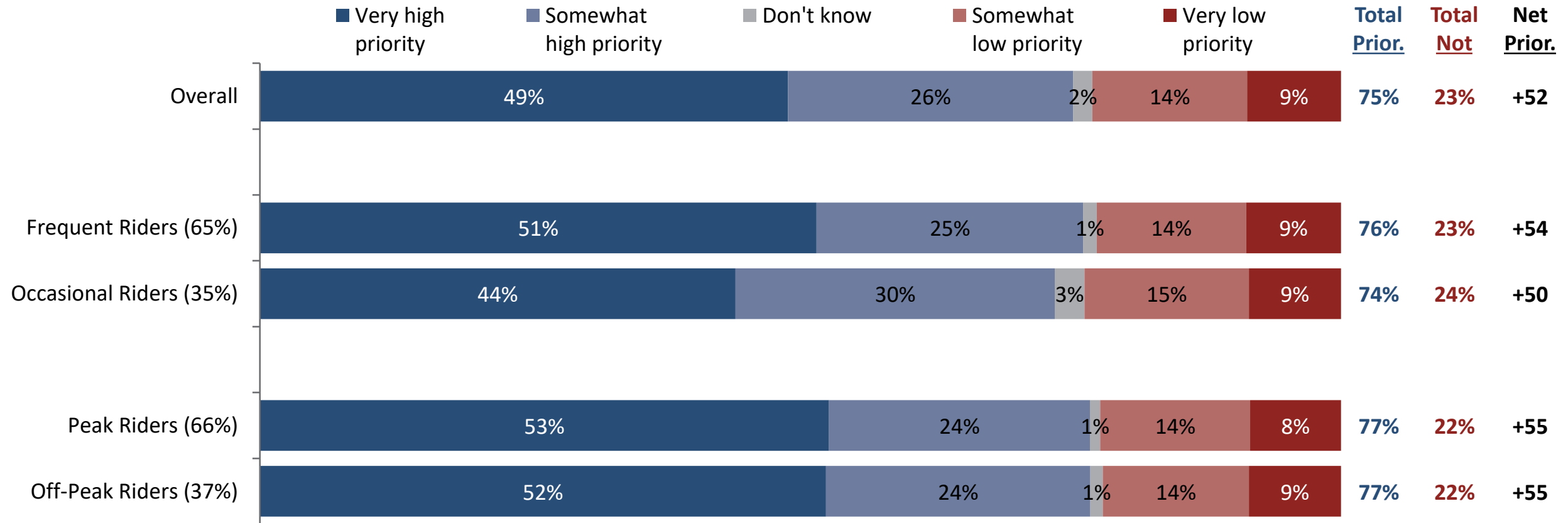


Q90. Please indicate how high a priority you think it should be for Caltrain:
 Allowing you to pay for your Caltrain rides by tapping your credit card directly on card readers at the stations

Caltrain App with Real-Time Information

About three-quarters of all riders indicate a Caltrain smartphone app with real-time transit information is a priority for them.

Developing a Caltrain smartphone app that includes schedule information, system maps, and real-time information and notifications about service changes and delays

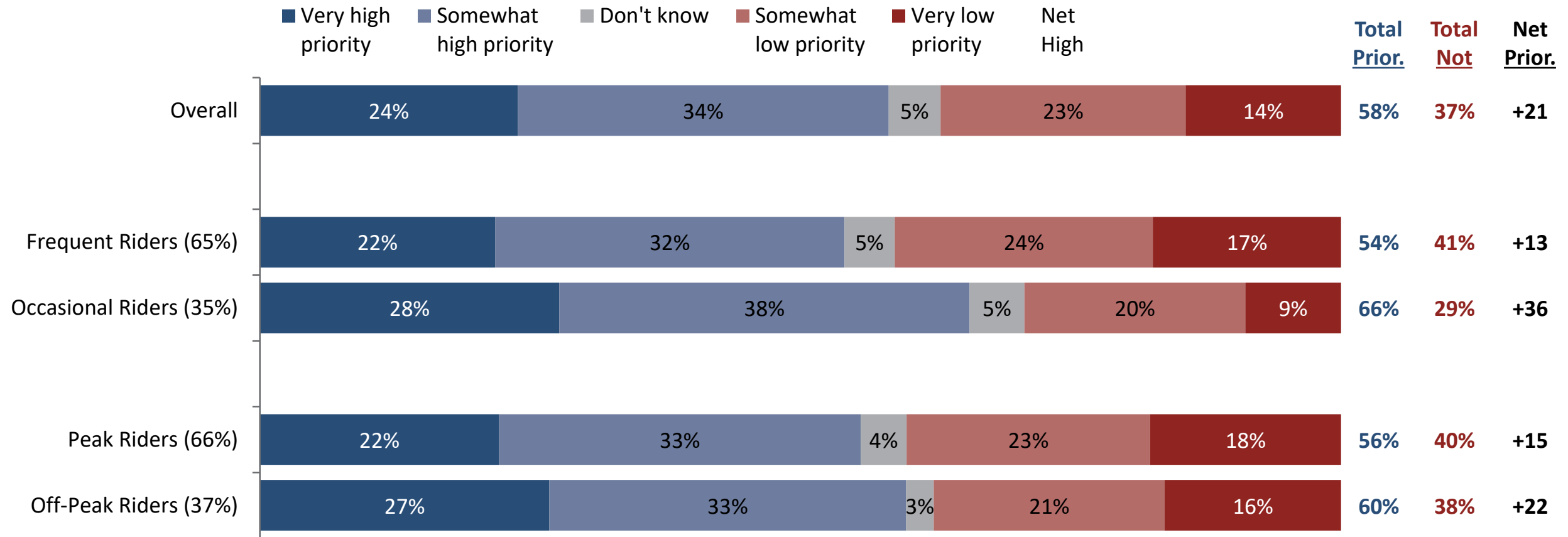


Q91. Please indicate how high a priority you think it should be for Caltrain: *Developing a Caltrain smartphone app that includes schedule information, system maps, and real-time information and notifications about service changes and delays*

Offering Riders Financial Incentive – Ridership Frequency

Occasional riders and off-peak riders are more likely to prioritize offering riders a financial incentive to ride at off-peak times.

Offering riders a financial incentive if they ride at off peak times to reduce overcrowding.

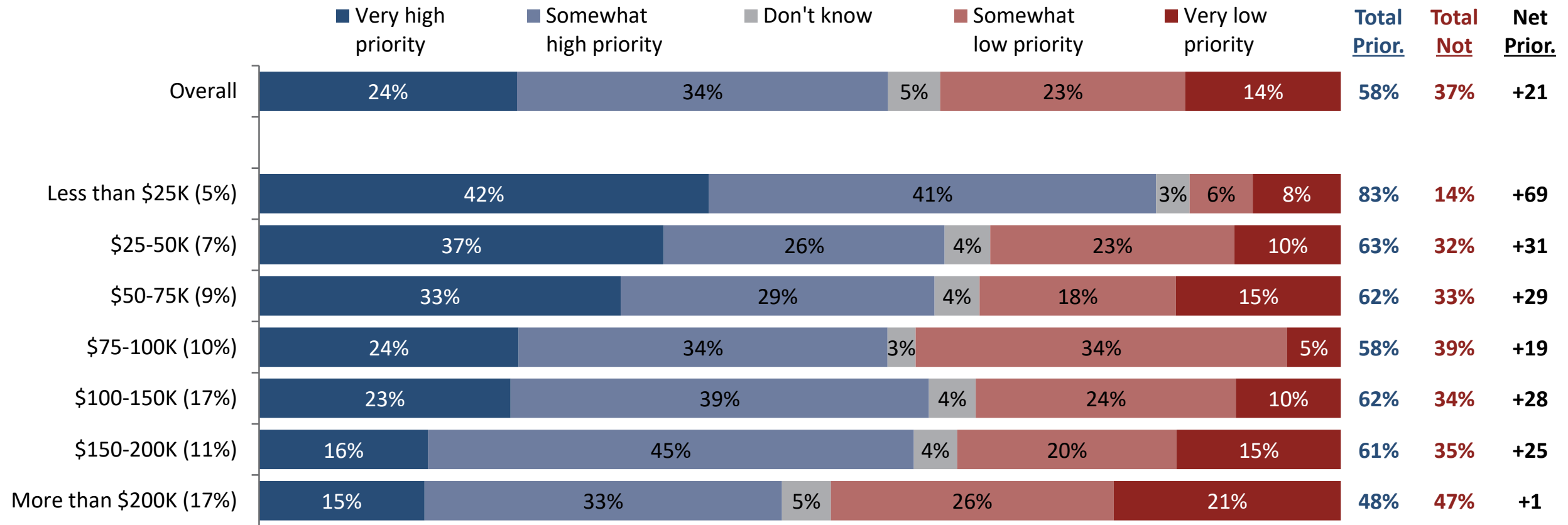


Q92. Please indicate how high a priority you think it should be for Caltrain:
Offering riders a financial incentive if they ride at off peak times to reduce overcrowding.

Offering Riders Financial Incentive – Income

The lower a rider's reported income, the more likely they are to highly prioritize the financial incentive for an off-peak ride.

Offering riders a financial incentive if they ride at off peak times to reduce overcrowding.

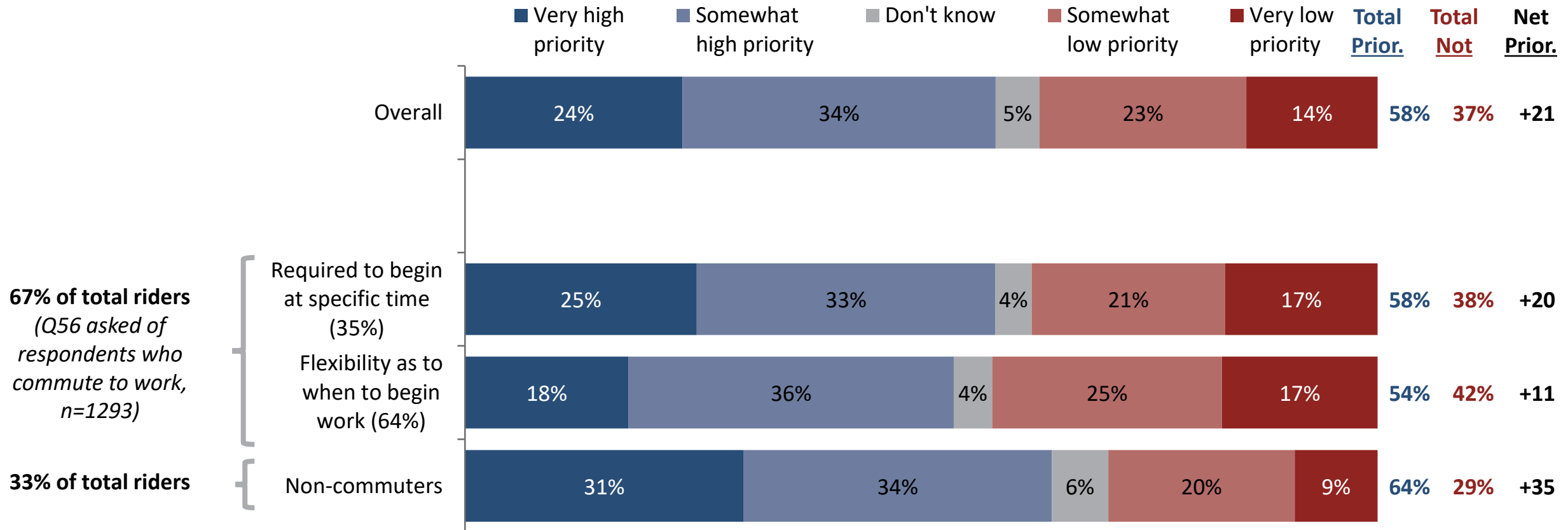


Q92. Please indicate how high a priority you think it should be for Caltrain:
Offering riders a financial incentive if they ride at off peak times to reduce overcrowding.

Offering Riders Financial Incentive – Work Start Times

Non-workers were most likely to prioritize the off-peak incentive. Out of those who report commuting to a job, those required to start work at a specific time gave the financial incentive a higher priority rating.

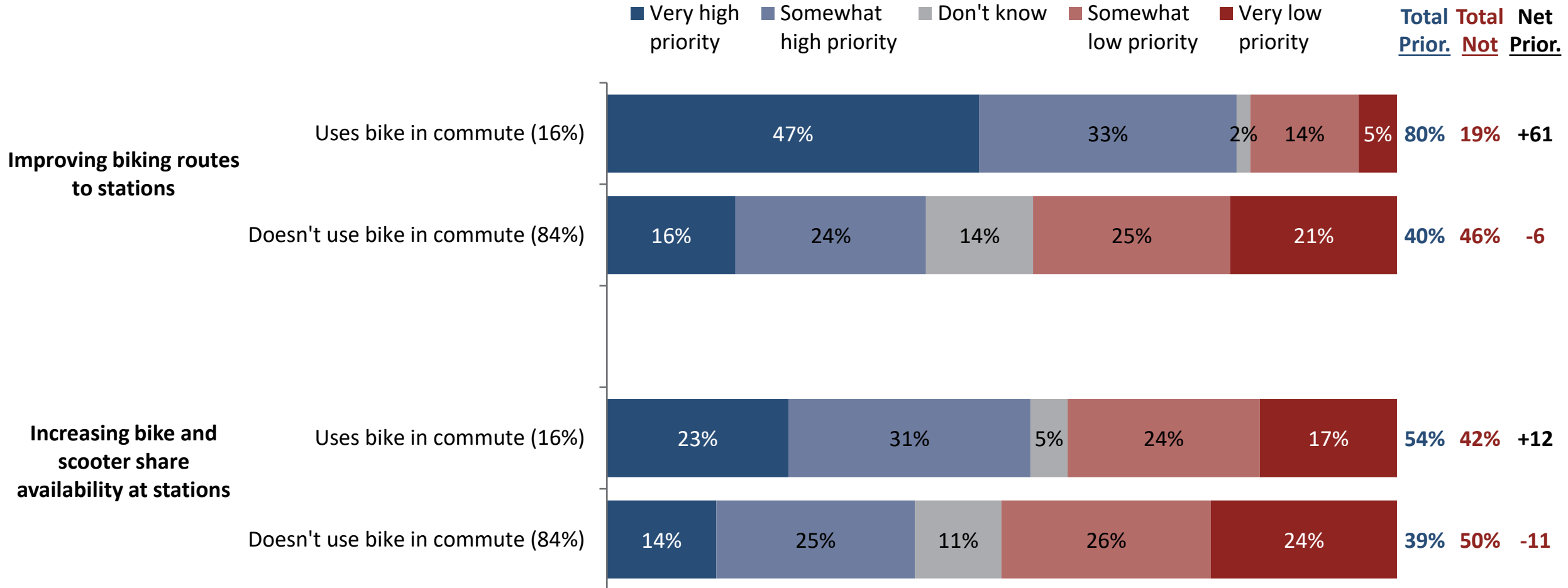
Offering riders a financial incentive if they ride at off peak times to reduce overcrowding.



Q92. Please indicate how high a priority you think it should be for Caltrain:
Offering riders a financial incentive if they ride at off peak times to reduce overcrowding.

Cyclist Priorities

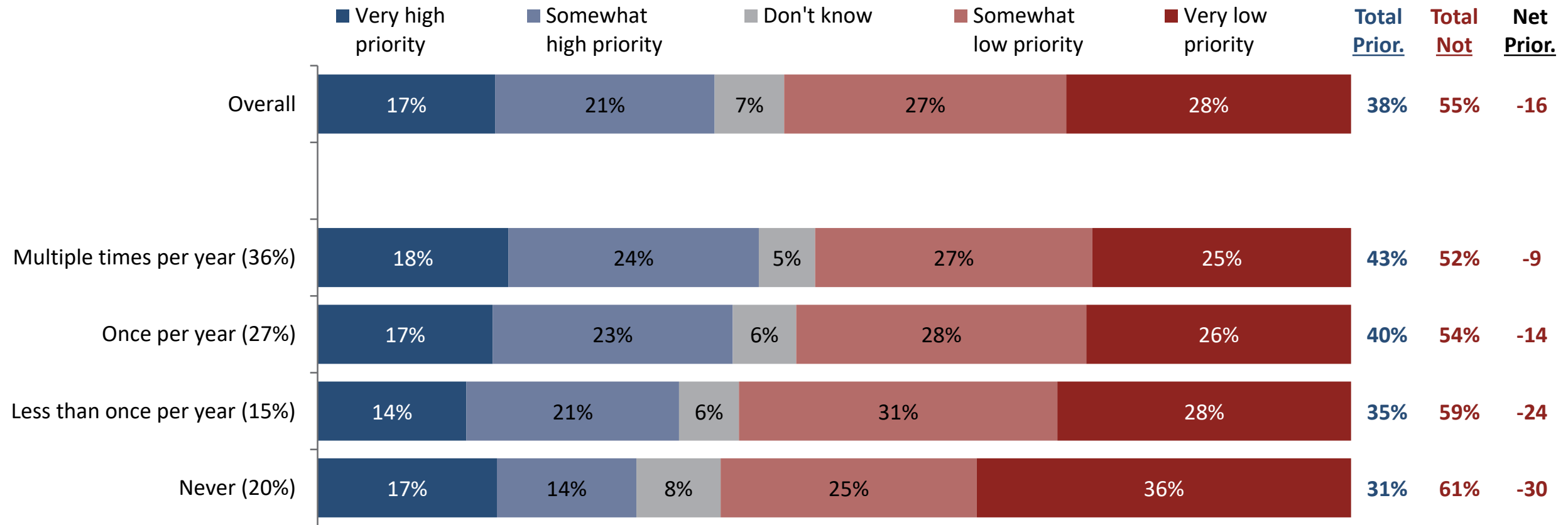
Cyclists are much more likely to prioritize improving biking routes to stations. They also prioritize increasing bike and scooter share availability, but not nearly to the same extent as biking routes.



Group Event Tickets – Special Events Riders

Those that travel to special events more frequently are more likely to prioritize discounted group tickets.

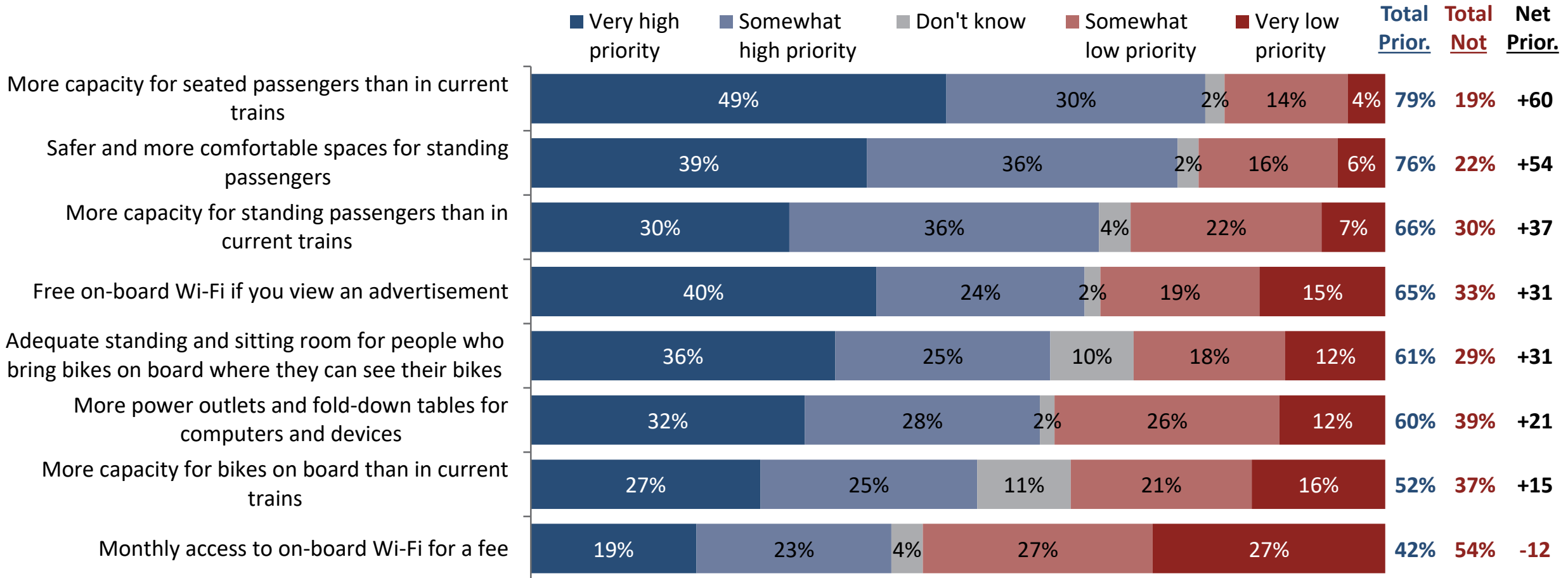
Providing discounts on group tickets for riders traveling together.



Q88. Please indicate how high a priority you think it should be for Caltrain:
Providing discounts on group tickets for riders traveling together.

Priorities for New Train Cars

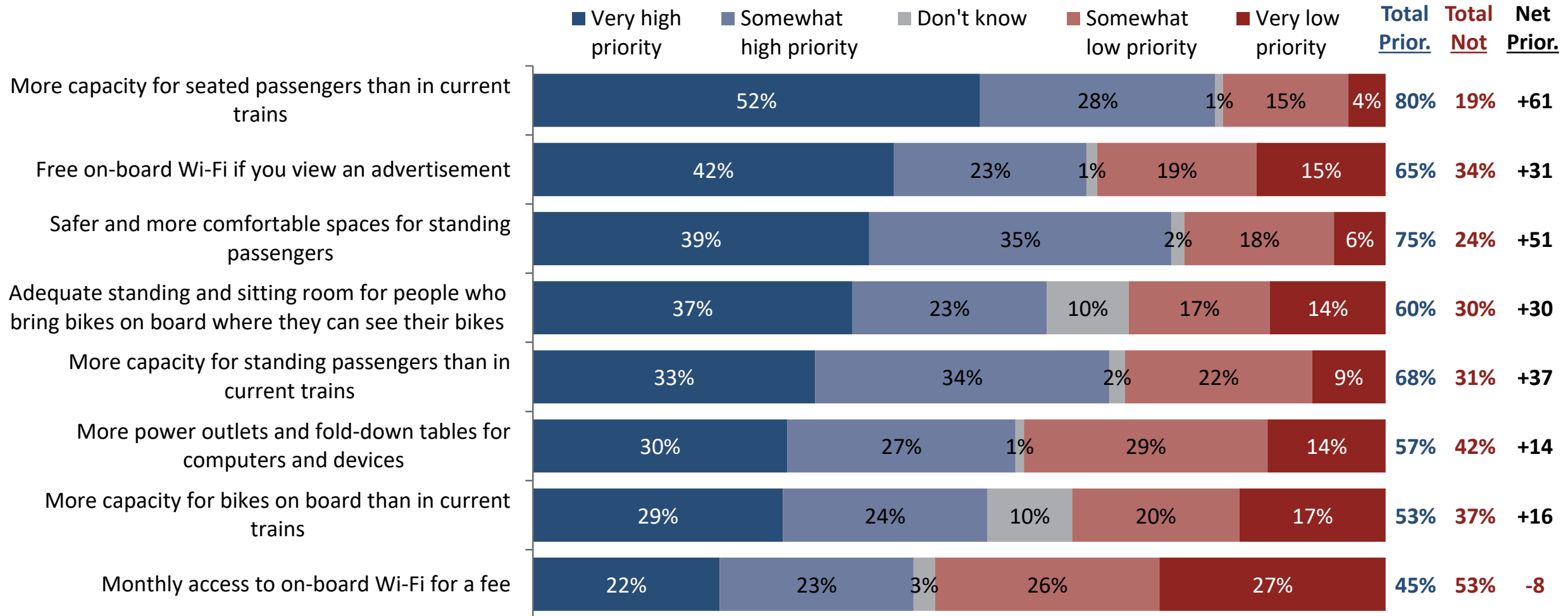
While both more seating capacity and more comfortable/safer standing capacity are priorities for over three-quarters of riders, seating capacity elicits a more intense response, with nearly half of riders ranking that as a high priority. Wi-Fi paid for with ads is more popular than Wi-Fi based on a fee.



Q93-100. Caltrain is also planning to purchase new train cars in the near future. For each of the following, please indicate how high a priority you think it should be for Caltrain to consider including in new train cars.

Priorities for New Train Cars – Frequency: Peak Riders

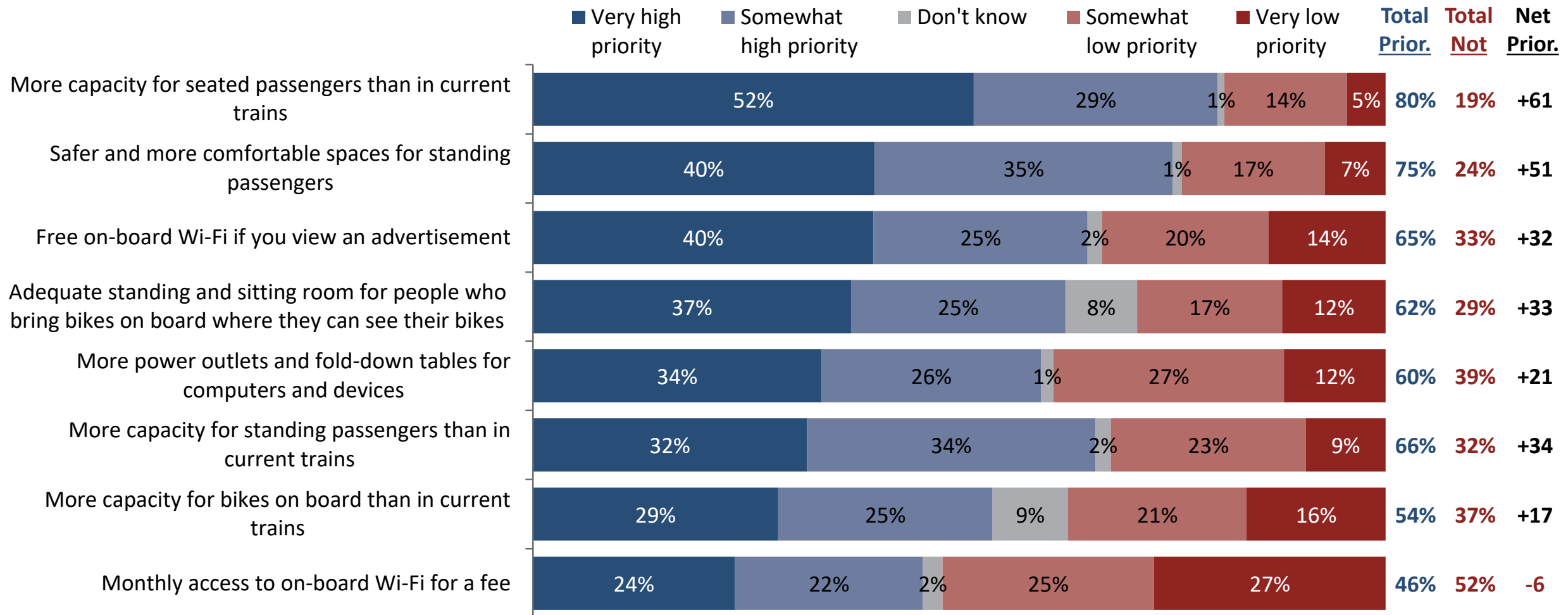
Peak and off-peak riders prioritize similar train car features.



Q93-100. Caltrain is also planning to purchase new train cars in the near future. For each of the following, please indicate how high a priority you think it should be for Caltrain to consider including in new train cars.

Priorities for New Train Cars – Frequency: Off-Peak Riders

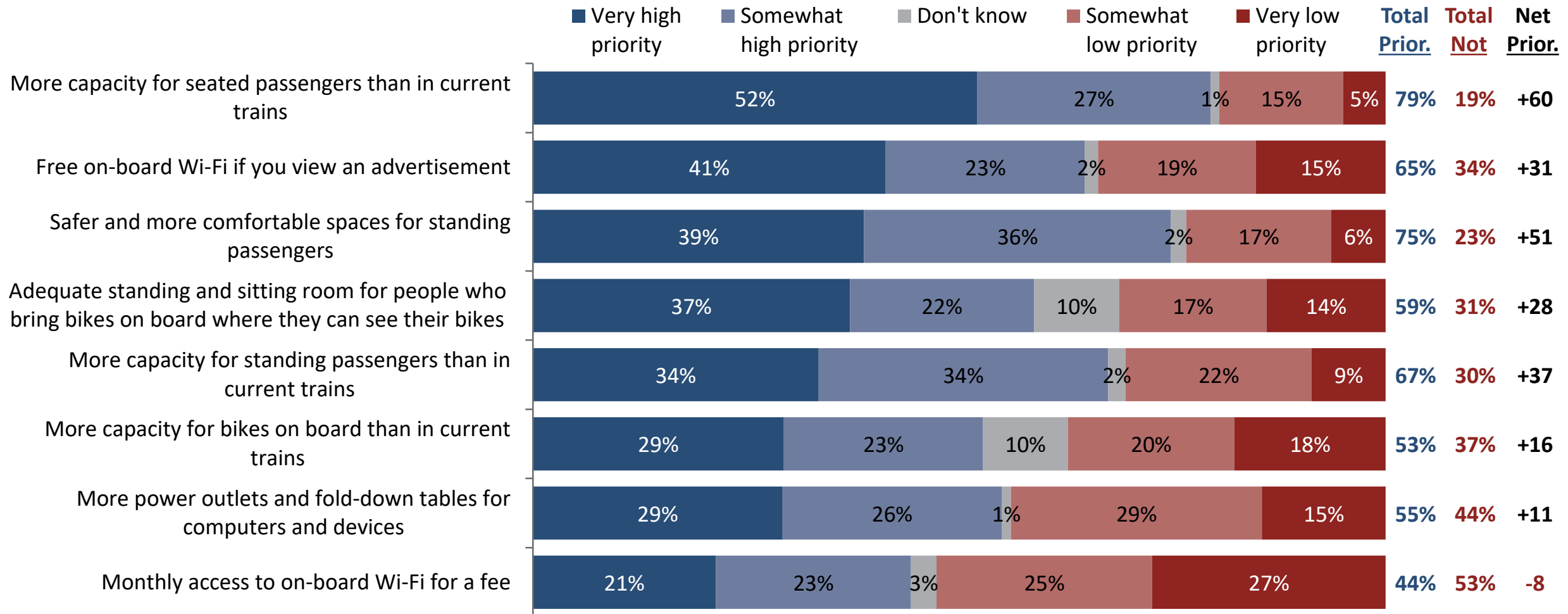
Peak and off-peak riders prioritize similar train car features.



Q93-100. Caltrain is also planning to purchase new train cars in the near future. For each of the following, please indicate how high a priority you think it should be for Caltrain to consider including in new train cars.

Priorities for New Train Cars – Frequency: Frequent Riders

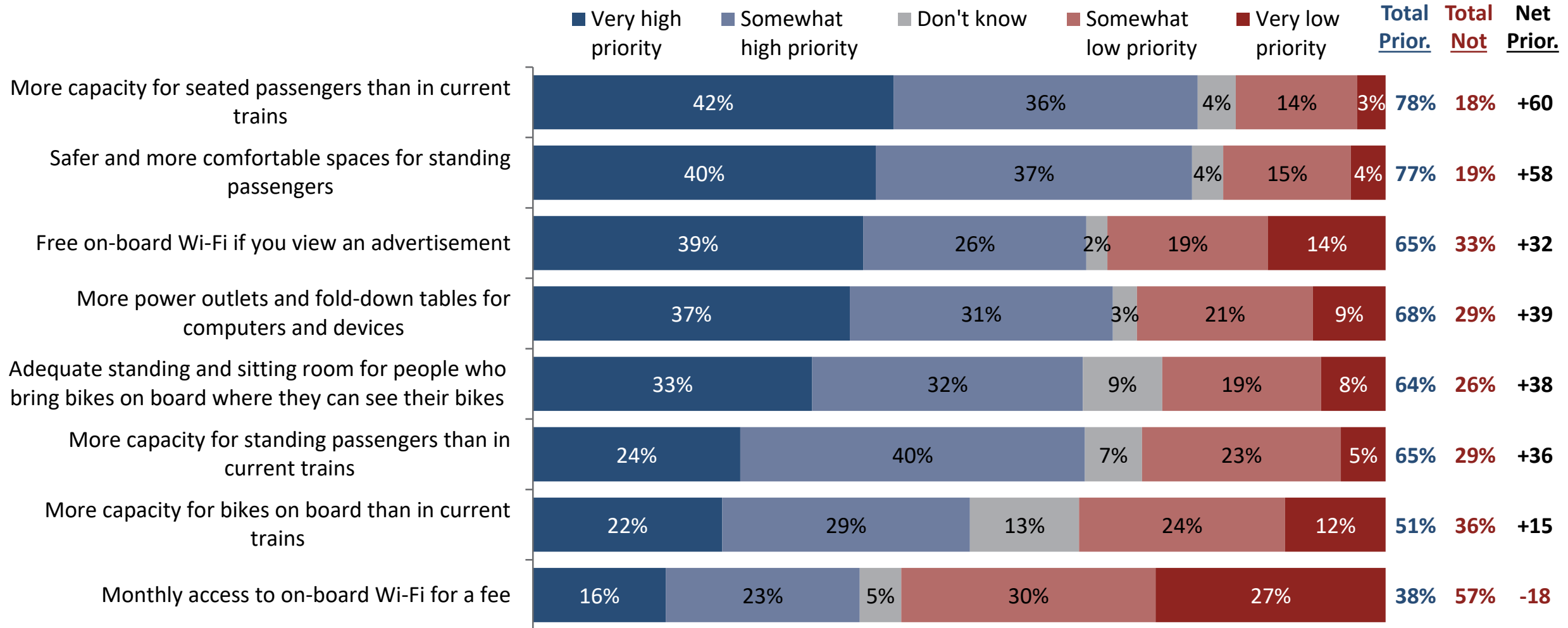
Frequent riders are more likely to highly prioritize more capacity for seated passengers.



Q93-100. Caltrain is also planning to purchase new train cars in the near future. For each of the following, please indicate how high a priority you think it should be for Caltrain to consider including in new train cars.

Priorities for New Train Cars – Frequency: Occasional Riders

Occasional riders prioritize more capacity for seated passengers, but not as intensely as frequent riders do.



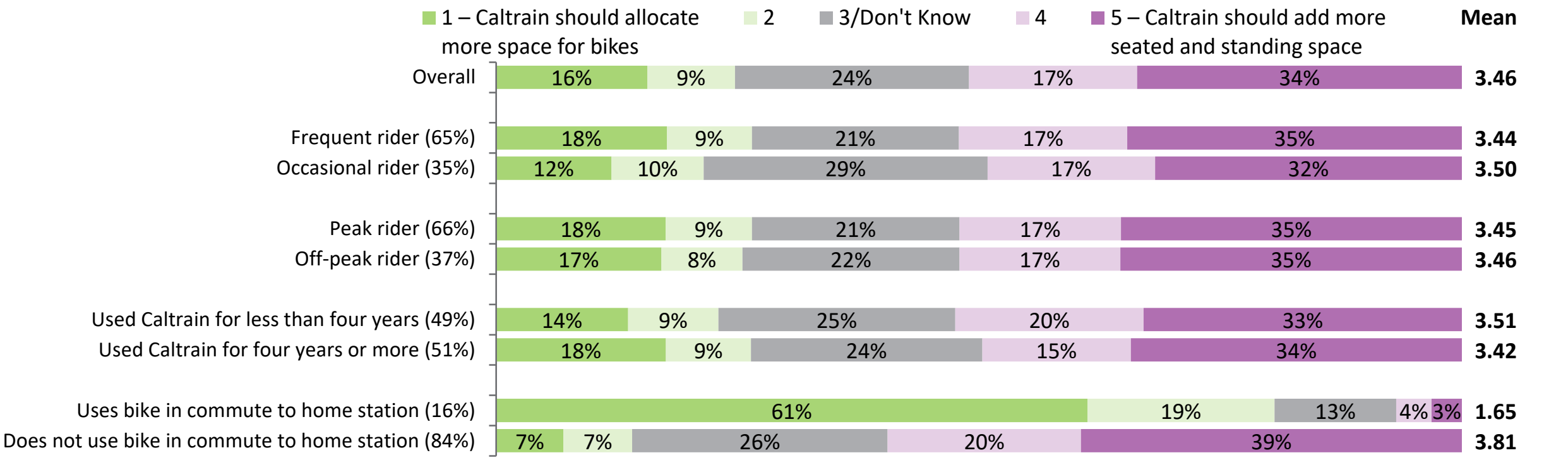
Q93-100. Caltrain is also planning to purchase new train cars in the near future. For each of the following, please indicate how high a priority you think it should be for Caltrain to consider including in new train cars.

Space for Bikes or Seats

The majority of riders think that Caltrain should offer more seating and standing room, even if it means bumping some bikers. However, four out of five of those who use bikes in their commute are in favor of allocating more space to bikes.

Some people say Caltrain should allocate more space for bikes on board the trains, even if it leaves less space for riders, because allowing more bikes on the trains helps the environment and reduces traffic by taking more cars off the road.

Other people say that Caltrain should allocate more space for seats and standing room, even if it means bikes sometimes get bumped, because commute hour trains are already overcrowded and accommodating as many passengers as possible is the best way to help the environment and reduce traffic by taking cars off the road.



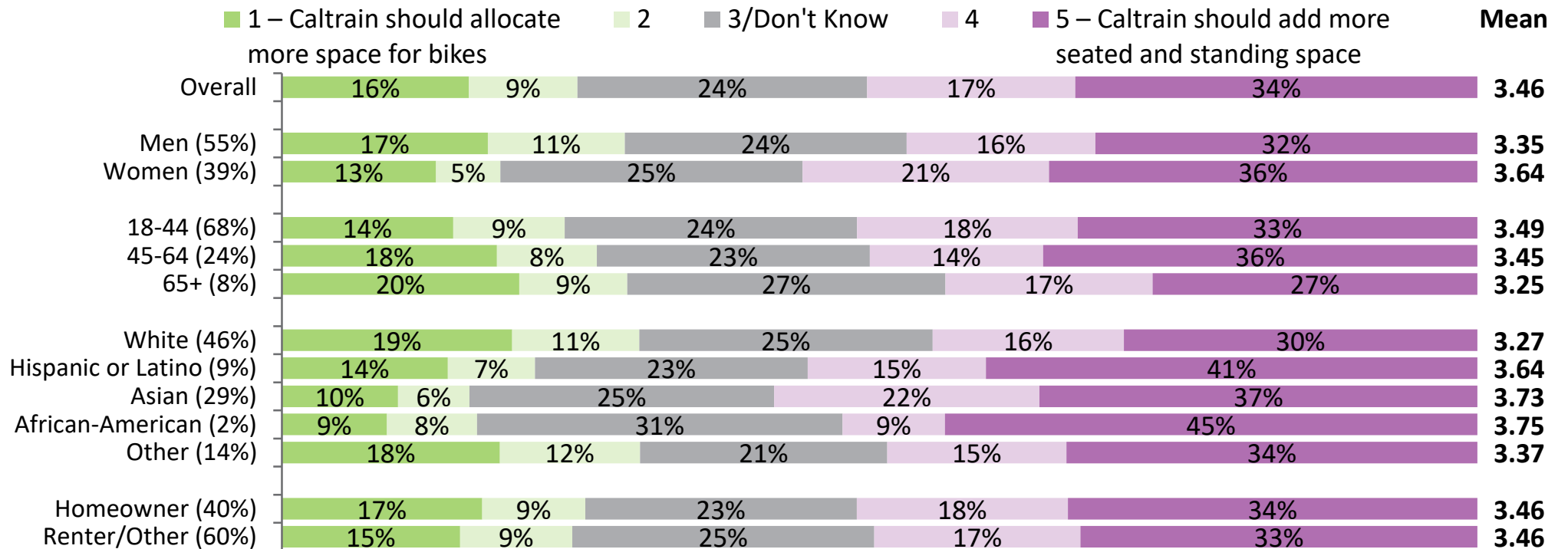
Q101. Please indicate where your opinion falls on the scale below.

Space for Bikes or Seats

About one in four riders did not know whether Caltrain should allocate additional space to bikes or additional space to seated and standing passengers.

Some people say Caltrain should allocate more space for bikes on board the trains, even if it leaves less space for riders, because allowing more bikes on the trains helps the environment and reduces traffic by taking more cars off the road.

Other people say that Caltrain should allocate more space for seats and standing room, even if it means bikes sometimes get bumped, because commute hour trains are already overcrowded and accommodating as many passengers as possible is the best way to help the environment and reduce traffic by taking cars off the road.

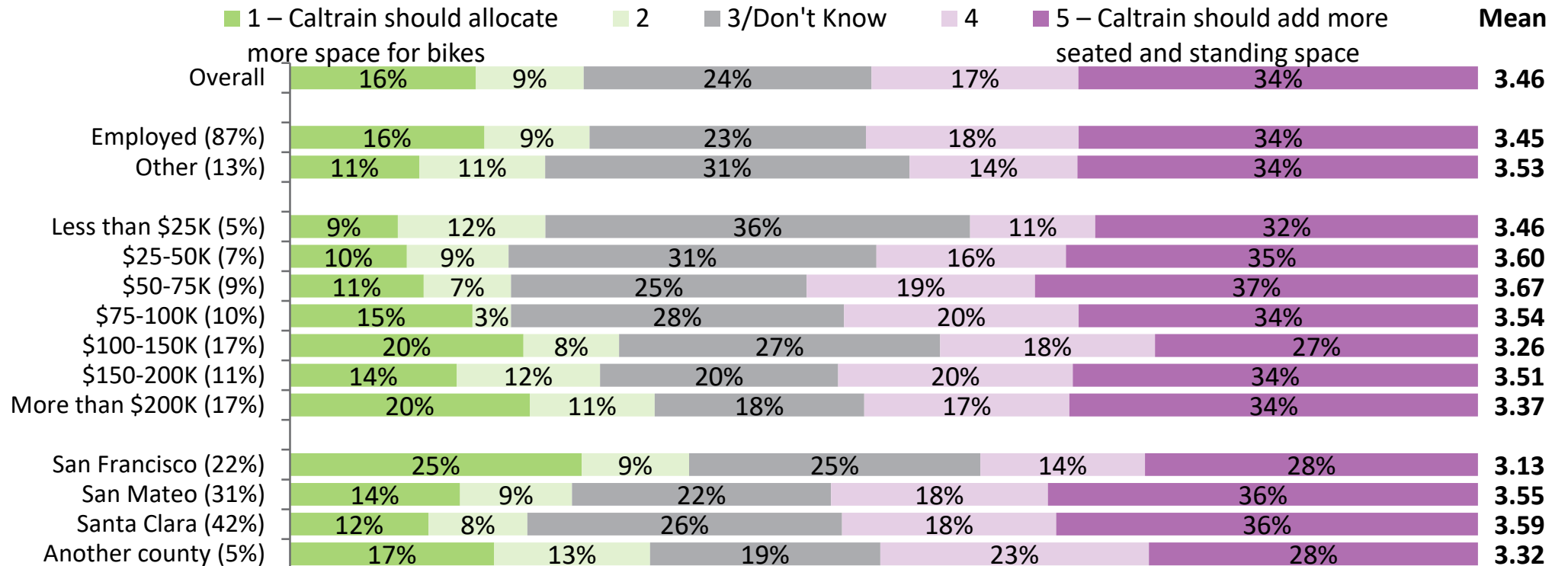


Space for Bikes or Seats

Riders across multiple employment and income demographics tend to think that Caltrain should allocate more space for sitting and standing passengers, though riders from San Francisco are more likely to support additional bike space.

Some people say Caltrain should allocate more space for bikes on board the trains, even if it leaves less space for riders, because allowing more bikes on the trains helps the environment and reduces traffic by taking more cars off the road.

Other people say that Caltrain should allocate more space for seats and standing room, even if it means bikes sometimes get bumped, because commute hour trains are already overcrowded and accommodating as many passengers as possible is the best way to help the environment and reduce traffic by taking cars off the road.

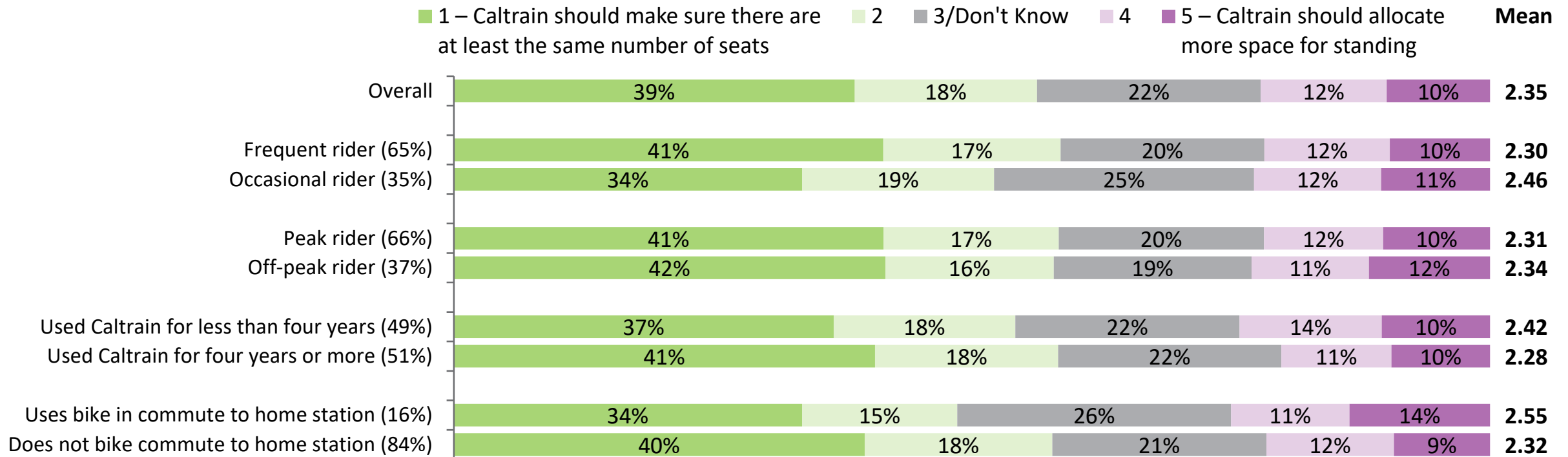


Seated or Standing Room on New Train Cars

A majority of riders want new cars on Caltrain to have at least the same number of seats as current cars, with frequent riders and those who have used Caltrain for more than 4 years being the most likely to have this opinion.

Some people say Caltrain should make sure the new train cars have at least the same number of seats as the current ones, even if that means little space for standing passengers, because with many riders on the train for an hour or more they should have as many seats as possible to make the ride safe and comfortable.

Other people say Caltrain should allocate more space for standing on the new train cars, even if that means fewer seats, because it would increase capacity while making it safer and more comfortable for people who end up having to stand.

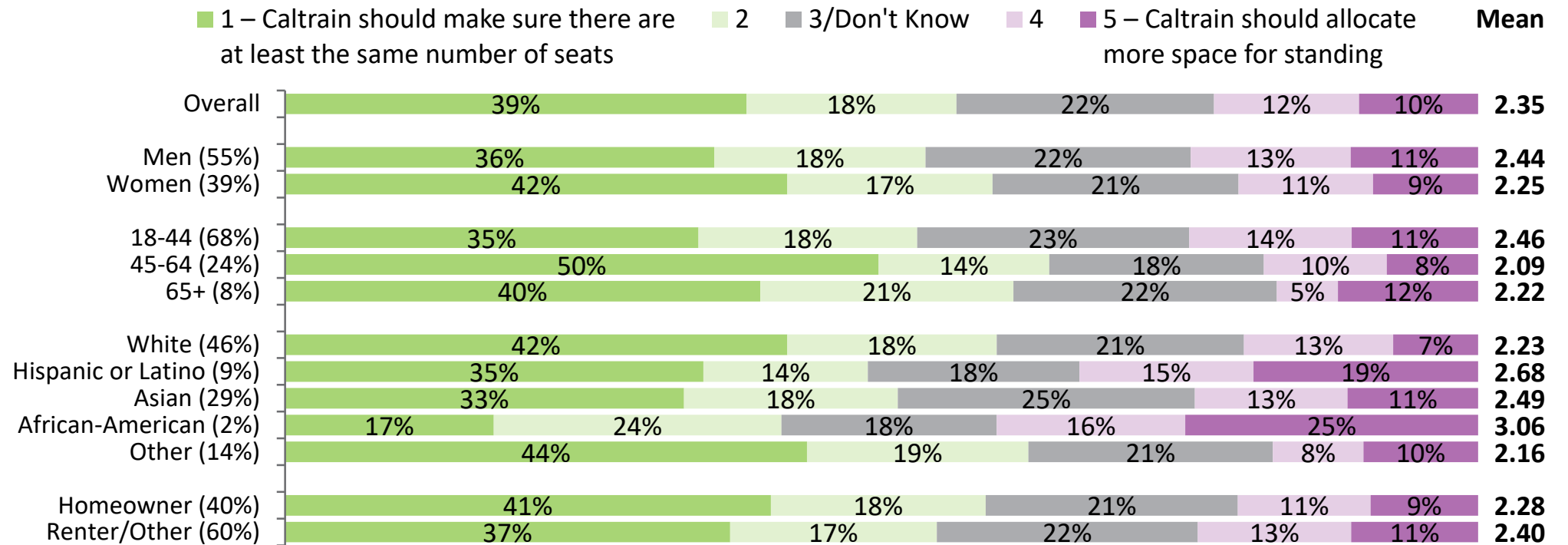


Seated or Standing Room on New Train Cars

Older respondents, and those whose self-identified ethnicity was white or 'other' were particularly likely to say they wanted to ensure that Caltrain's new train cars maintain current levels of seating.

Some people say Caltrain should make sure the new train cars have at least the same number of seats as the current ones, even if that means little space for standing passengers, because with many riders on the train for an hour or more they should have as many seats as possible to make the ride safe and comfortable.

Other people say Caltrain should allocate more space for standing on the new train cars, even if that means fewer seats, because it would increase capacity while making it safer and more comfortable for people who end up having to stand.

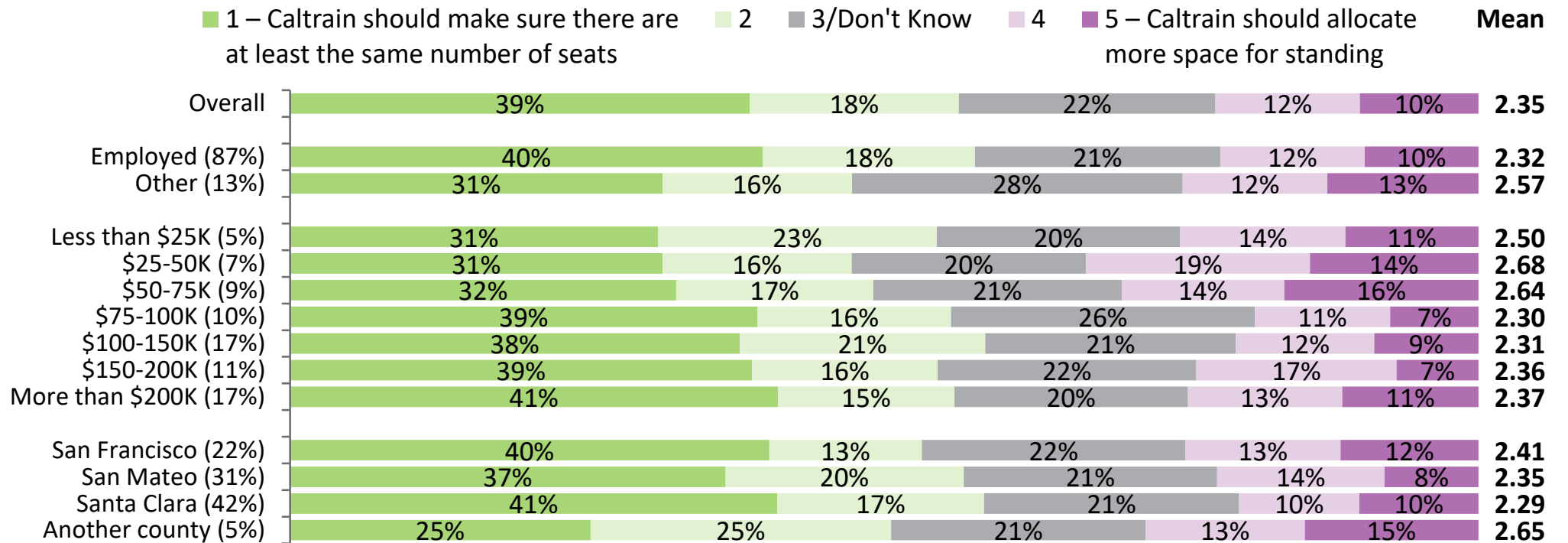


Seated or Standing Room on New Train Cars

Between 20% and 30% of respondents in most income, geographic, and employment demographics thought that Caltrain's new cars should allocate more space for standing passengers, even if it meant less seating.

Some people say Caltrain should make sure the new train cars have at least the same number of seats as the current ones, even if that means little space for standing passengers, because with many riders on the train for an hour or more they should have as many seats as possible to make the ride safe and comfortable.

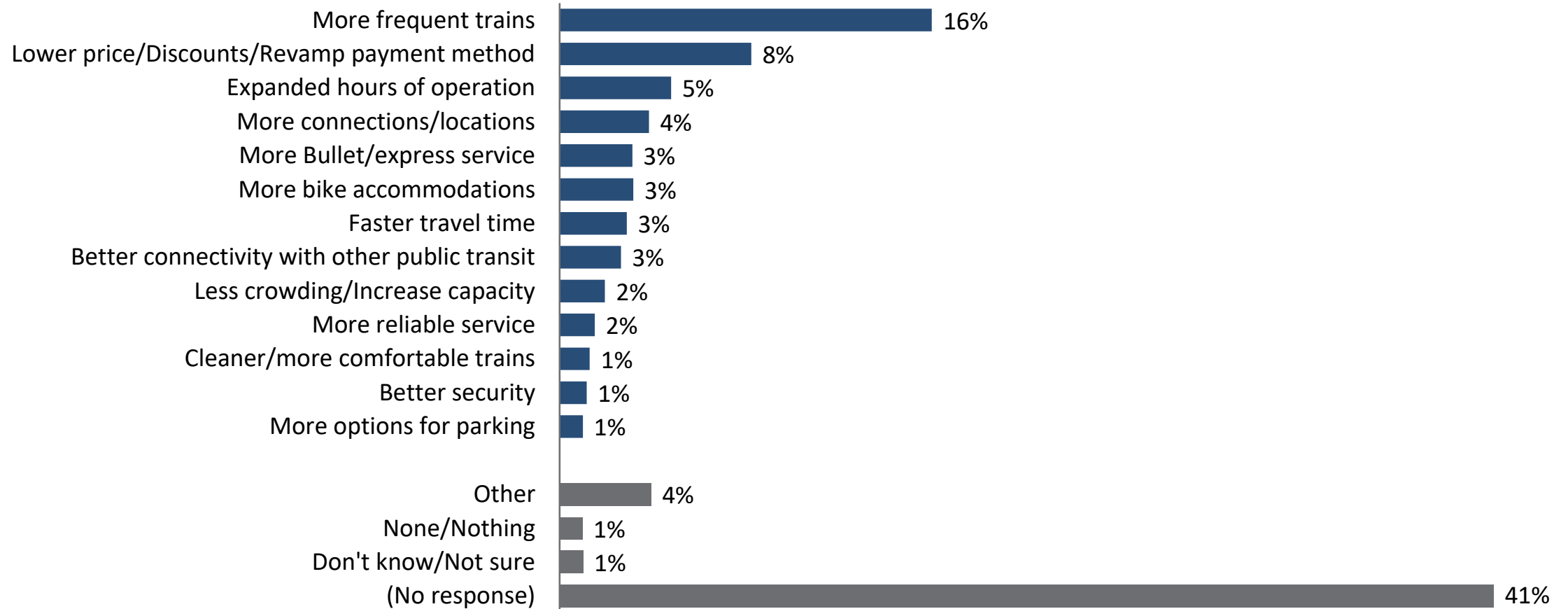
Other people say Caltrain should allocate more space for standing on the new train cars, even if that means fewer seats, because it would increase capacity while making it safer and more comfortable for people who end up having to stand.



Most Important Thing to Increase Ridership

Riders say they would increase their ridership if trains were more frequent, if it were cheaper or easier to pay for Caltrain, or if the operation hours were extended.

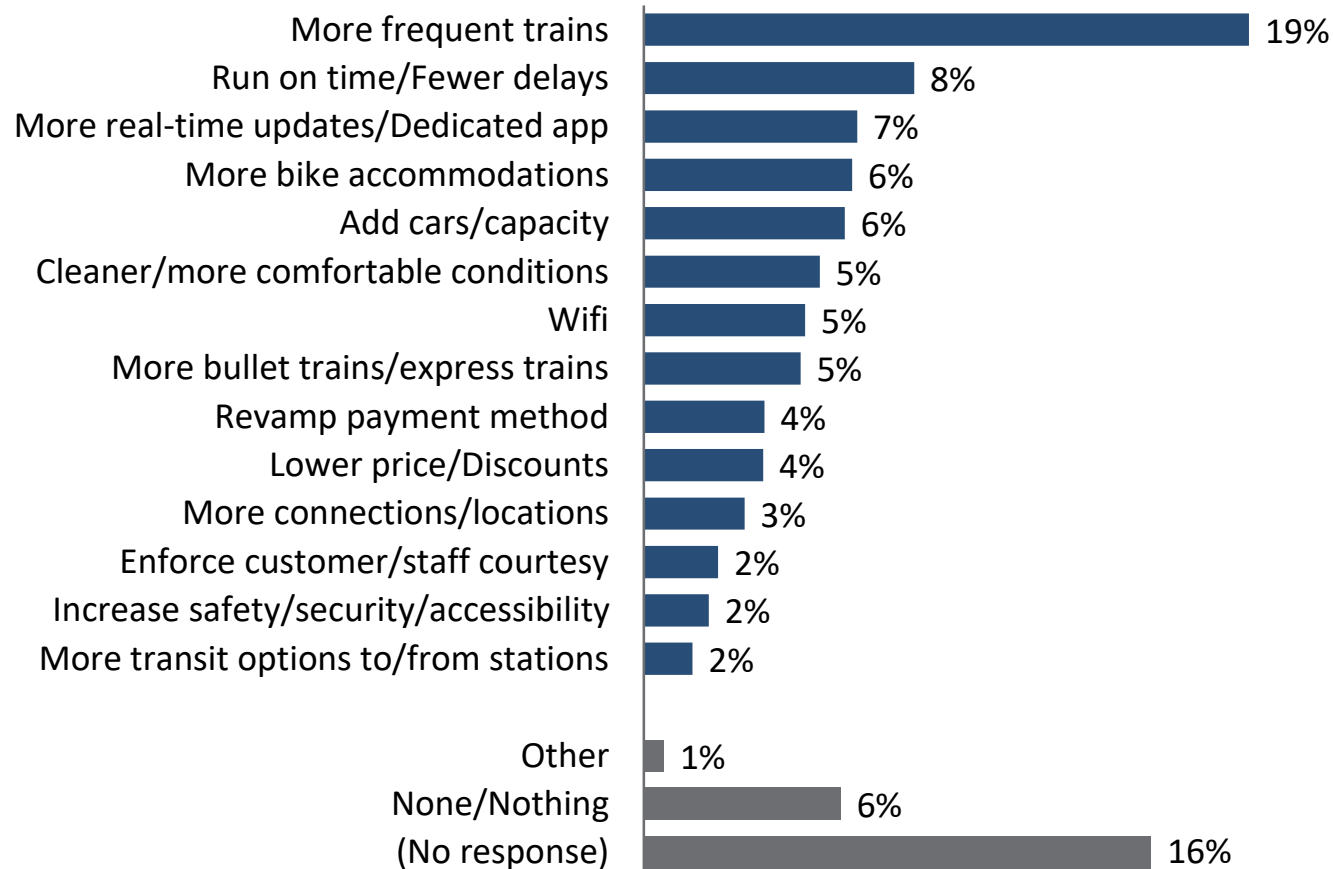
What is the single most important thing Caltrain could do to increase the number of trips you take on Caltrain?



Suggestions to Increase Passenger Satisfaction

Caltrain passengers report that they would be happier if trains were more frequent, there were fewer delays, and if there were an app that provided real-time updates.

If Caltrain could do one thing to make you a happier passenger, what would it be?



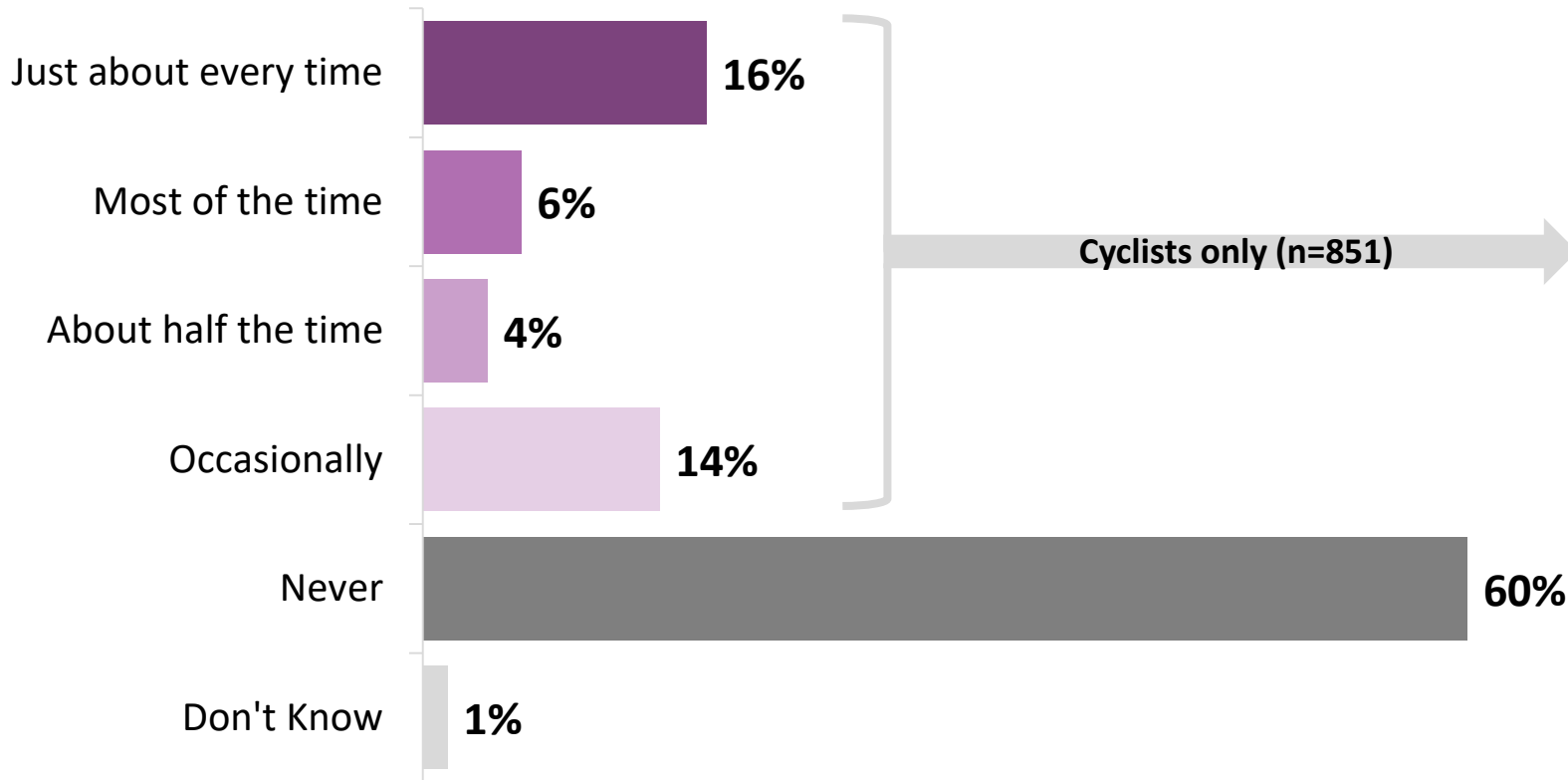


Cyclist Questions

Bike Use & Average Distance Biked

Two out of five Caltrain riders report involving a bike in their Caltrain trip at least occasionally.

In general, how often do you ride a bike as part of your Caltrain trip, regardless of whether it is your own bike or a bike share?



Distance Biked to Home Station	
Less than 1 mile	18%
1 mile	24%
2 miles	27%
3-4 miles	17%
5-10 miles	13%
More than 10 miles	2%

Distance Biked from Destination Station	
Less than 1 mile	20%
1 mile	28%
2 miles	28%
3-4 miles	12%
5-10 miles	11%
More than 10 miles	2%

Q63. In general, how often do you ride a bike as part of your Caltrain trip, regardless of whether it is your own bike or a bike share?

Q64. Please estimate the distance you bike (in miles) to and from your origin/home station for your most common trip on Caltrain.

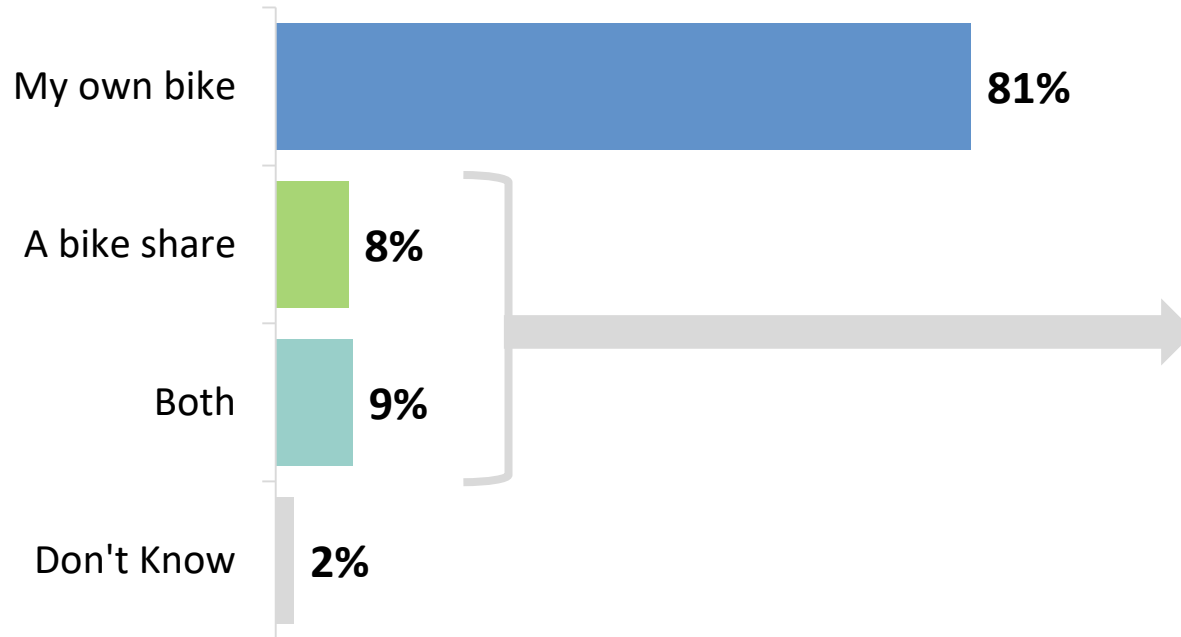
Q65. Please estimate the distance you bike (in miles) to and from your destination station for your most common trip on Caltrain.

Personal Bike or Bike Share?

The majority of cyclists use their own bike in their commute, with nearly one in five ever using a bike share bike. Approximately 20% of those who use a bike share report frequently having a problem finding a bike.

Cyclists only (n=851)

When you ride a bike to or from Caltrain, is it usually your own bike, a bike share, or a combination of both?



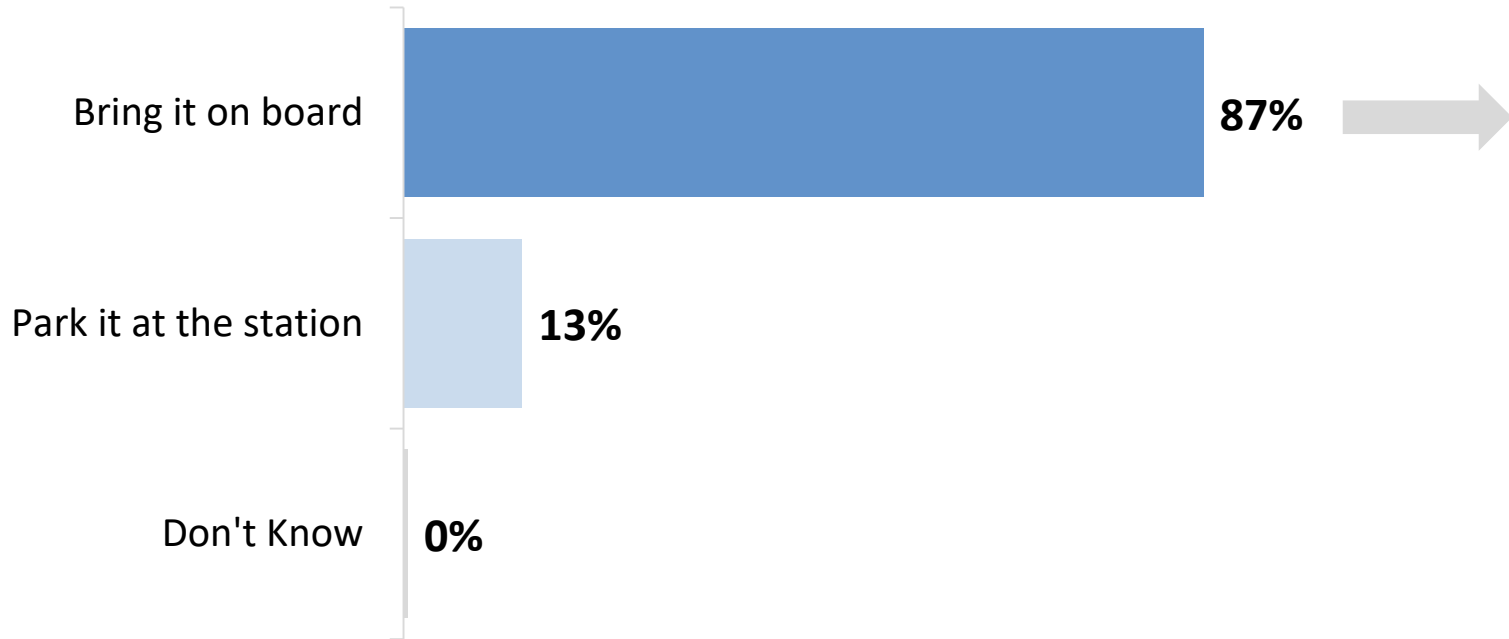
Do you ever have a problem finding a bike share? <i>Asked of those who use bike share (n=131)</i>	
No, I generally can find a bike.	31%
I occasionally have a problem finding an available bike	49%
I frequently have a problem finding an available bike	19%
Don't know	1%

Bringing Bike On Board Caltrain

Nearly nine out of ten cyclists that ride their own bike in a Caltrain trip report usually bringing it on the train. Of those, over half report having been bumped from the train at least once.

Cyclists only (n=851)

When you bring your own bike, do you usually bring it on board Caltrain, or park it at the station before getting on the train?*



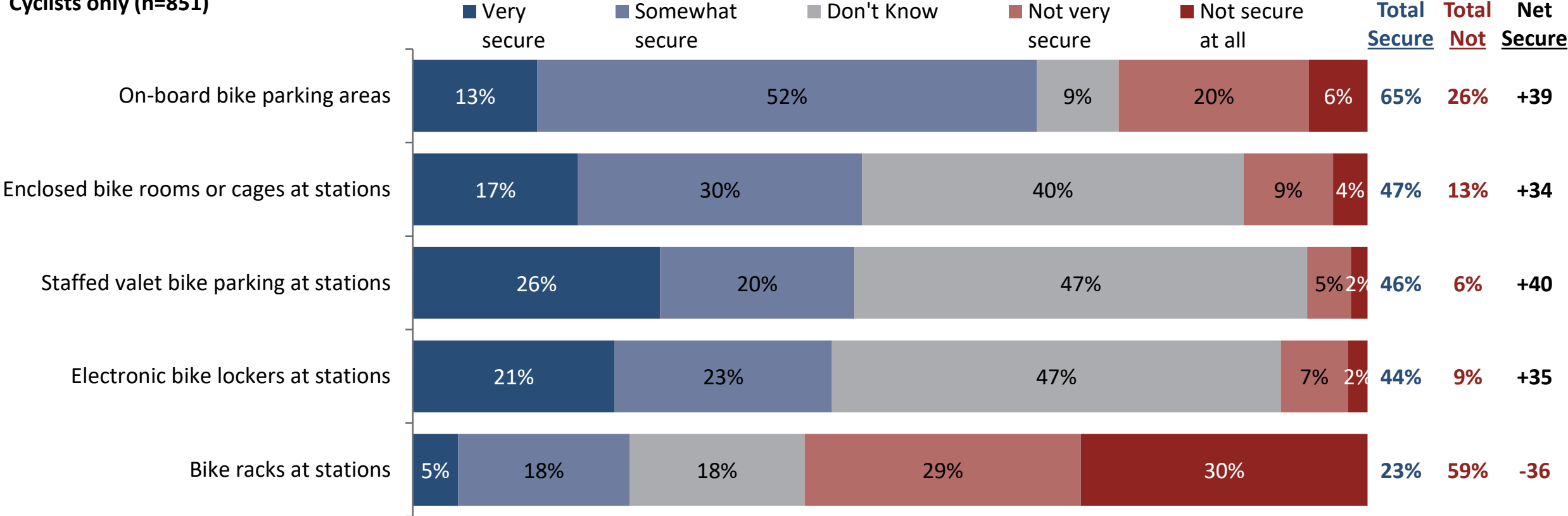
How often have you been denied boarding/bumped? <i>Asked of those who bring their own bike on board (n=779)</i>	
I have never been bumped	42%
I have been bumped one to three times	30%
I have been bumped more than three times	26%
Don't know	2%

Q73. When you bring your own bike, do you usually bring it on board Caltrain, or park it at the station before getting on the train?

Security of Caltrain Bike Facilities

While many cyclists were unable to rate the security of staffed valet bike parking, electronic bike lockers and enclosed bike rooms, over a quarter of cyclists said that staffed valet bike parking was very secure. On-board bike parking areas are largely seen as somewhat secure.

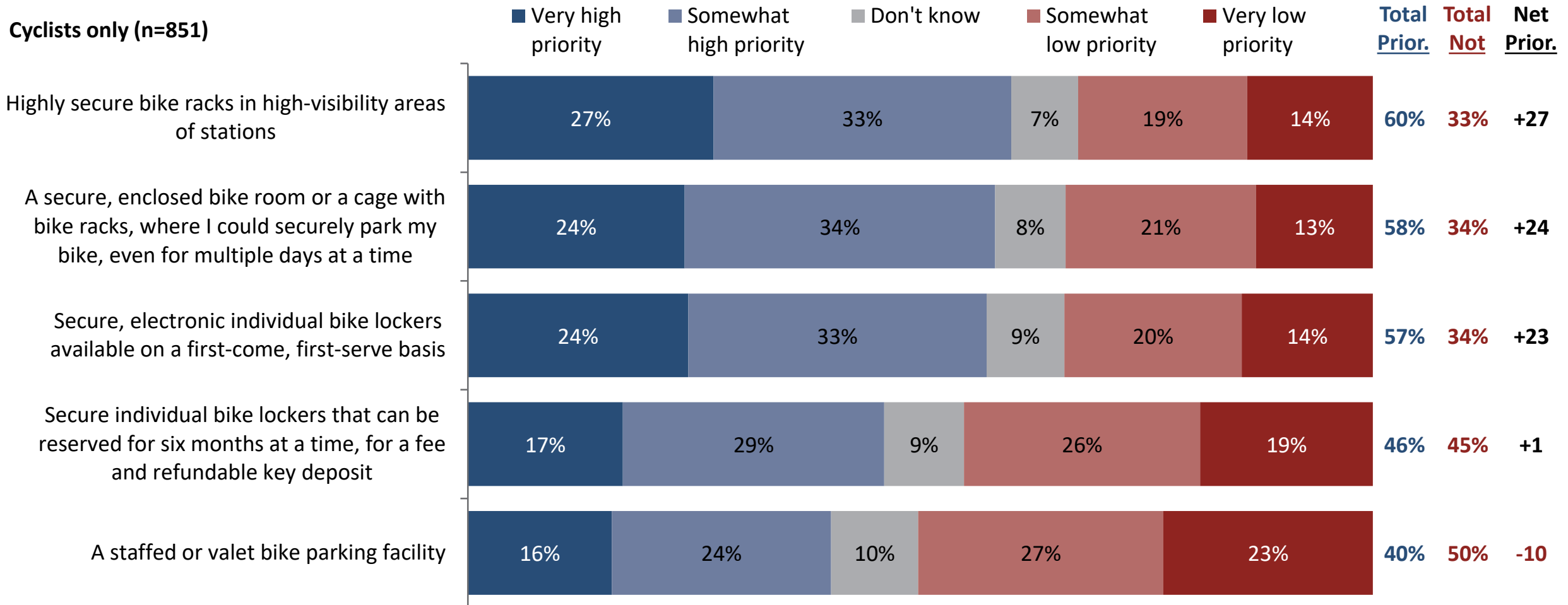
Cyclists only (n=851)



Q66-70. Please rate how you feel about the security of each of the following Caltrain bike facilities, even if you don't personally use them.

Priorities for Bike Infrastructure Changes

The highest bike storage infrastructure priority for cyclists is additional highly-secure bike racks in high-visibility areas of stations. Individual electronic bike lockers and a bike room/cage are nearly equal in rating.

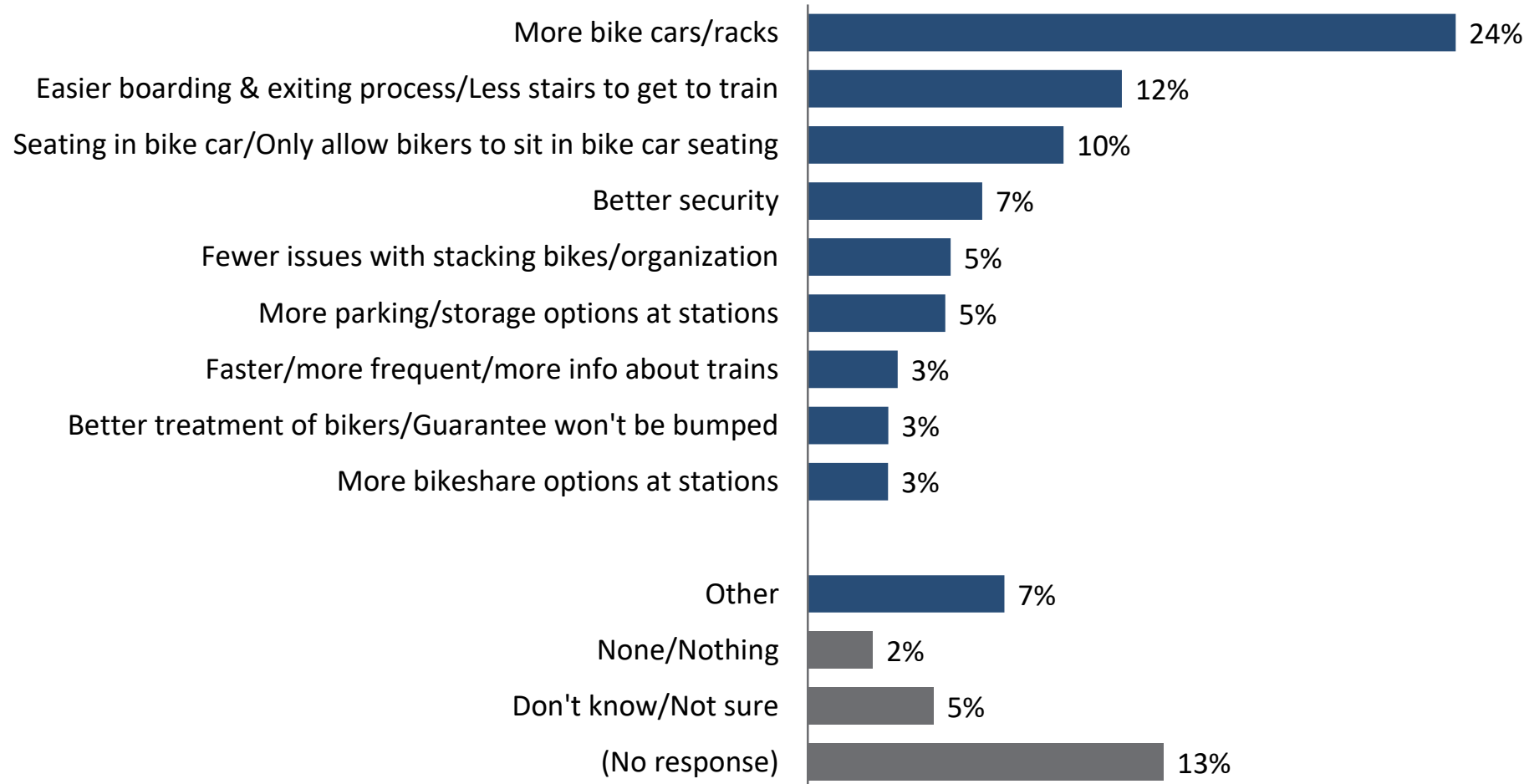


Q75-79. Caltrain is considering a number of changes to the bike infrastructure at their stations. For each of the following, please indicate how high a priority you think it should be for Caltrain to implement this at its stations.

Most Desired Change Regarding Bikes and Caltrain

Cyclists most want to see more bike cars and bike storage and an easier boarding process with a bike.

Cyclists only (n=851)





Non-Rider Survey Findings

Non-Rider Survey Methodology

- ▶ Multi-modal survey of 1,318 residents of Caltrain’s three-county service area (San Francisco, Santa Clara, and San Mateo counties)* who typically ride Caltrain once a year or less (“non-riders”).
 - The survey was administered using a mix of telephone, online, and paper surveys, with the survey sample coming from a mix of a postcard-driven random sample survey of adults in the area and a pre-recruited web panel population.
 - Some participants in the Caltrain rider survey (see methodology from previous section) qualified as non-riders based on their answer to the Caltrain ridership question.

- ▶ Results weighted to reflect non-rider demographics of the three-county area.
- ▶ The survey was available in English, Chinese, Vietnamese, and Spanish.
- ▶ Conducted February 22 – April 12, 2019.
- ▶ Margin of error is +/- 2.7%; higher for subgroups

Please note that due to rounding, percentages may not add up to exactly 100%.

Key Non-Rider Findings

- ▶ Among non-riders, Caltrain has a healthy favorability rating.
- ▶ Caltrain's attributes are rated positively by non-riders, at least those who are able to rate them.
 - While a third to half of respondents are unable to rate individual attributes of Caltrain, that means that two-thirds to half of non-riders know enough about the system to comfortably rate it.
 - Despite many not being able to rate attributes, the system is overall viewed favorably.
- ▶ The main reason respondents cite for not riding Caltrain more is that they don't go where it goes (meaning to SF, or down the Peninsula) or that it's not close to their home, work, or school.
 - Many respondents say that they would take Caltrain if it had more stations, or was closer to their homes.

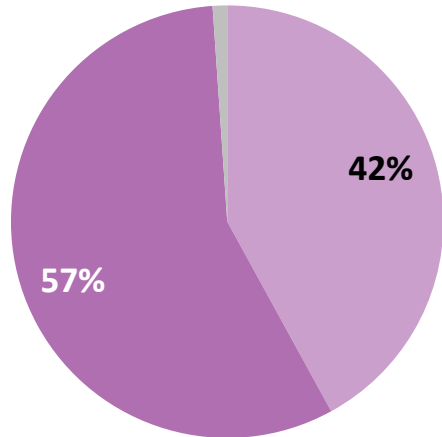


Non-Rider Demographic Profile

Non-Rider Profile: Gender, Age, Ethnicity, and Language

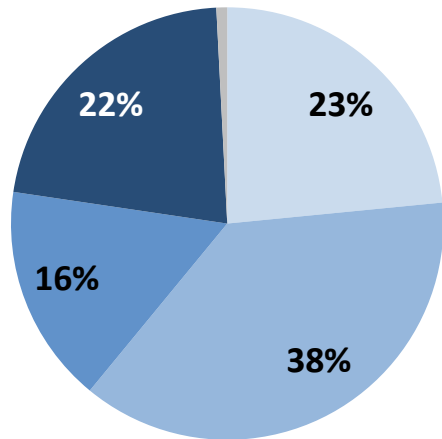
Gender

- Male
- Female
- Other/Ref

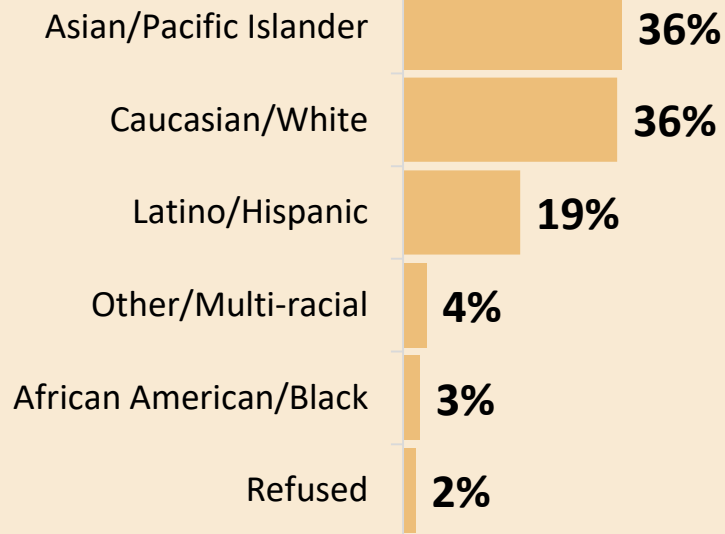


Age

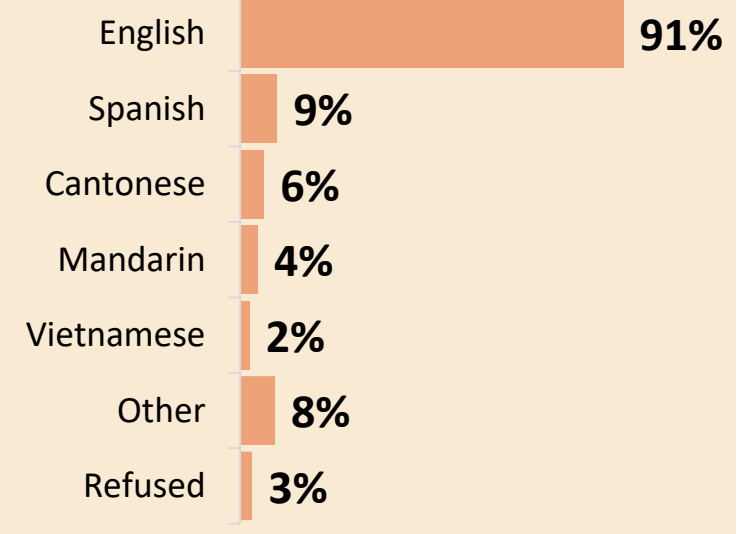
- 18-34
- 35-54
- 55-64
- 65+
- Refused



Combined Ethnicity



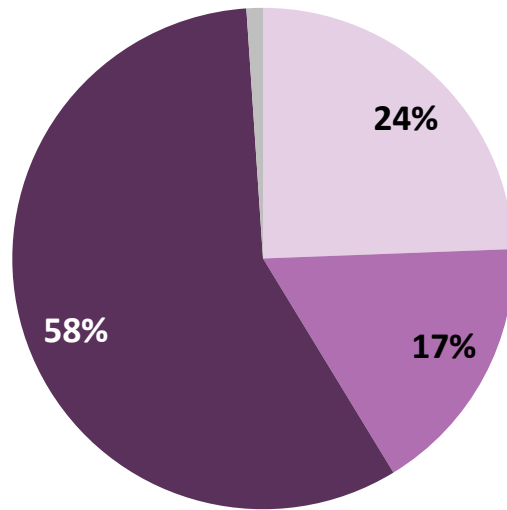
Language(s) Spoken at Home



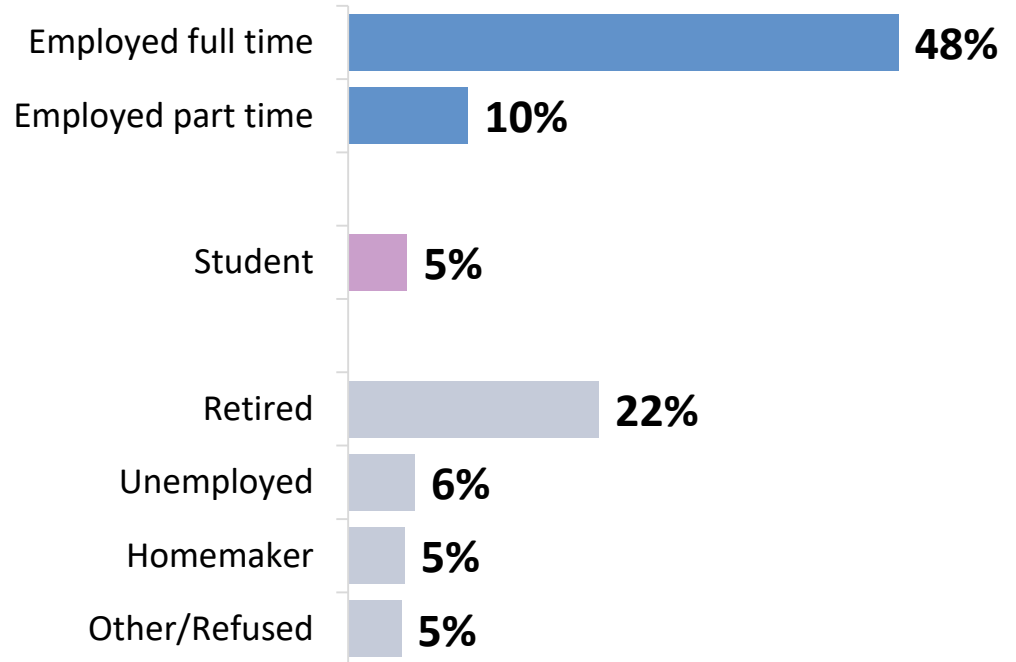
Rider Profile: County of Residence and Job Status

County

- San Francisco
- San Mateo
- Santa Clara
- Another county/Refused



Job Status

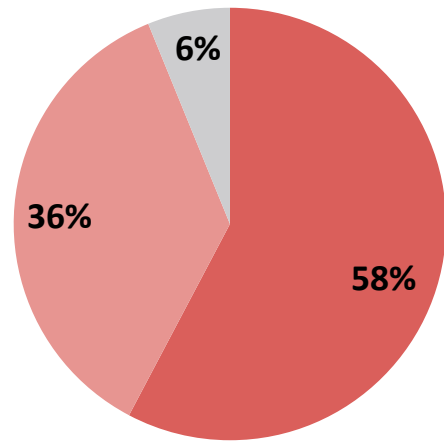


Q1. What county do you live in?
Q58. What is your job status?

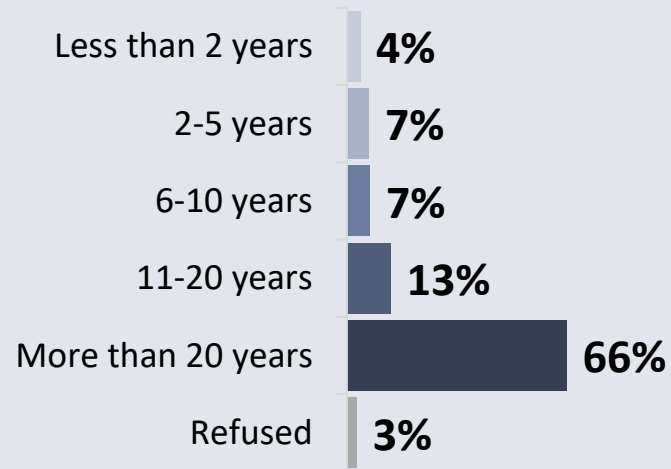
Non-Rider Profile: Home Ownership, Years in Bay, and Income

Own/Rent

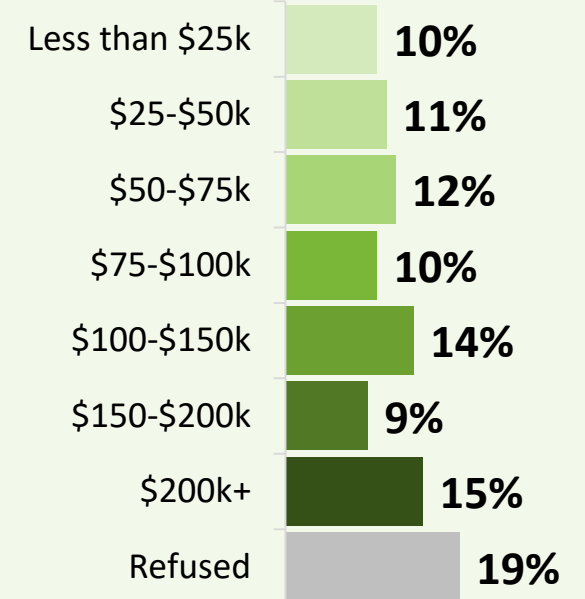
- Own
- Rent
- Other/Ref



How many years have you lived in the Bay Area?



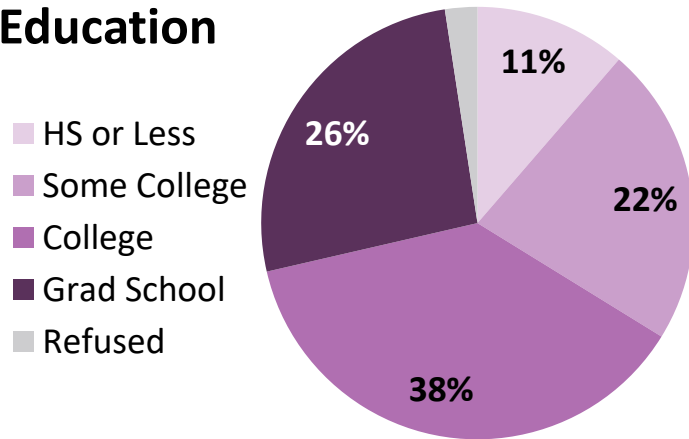
Total household income before taxes in 2018?



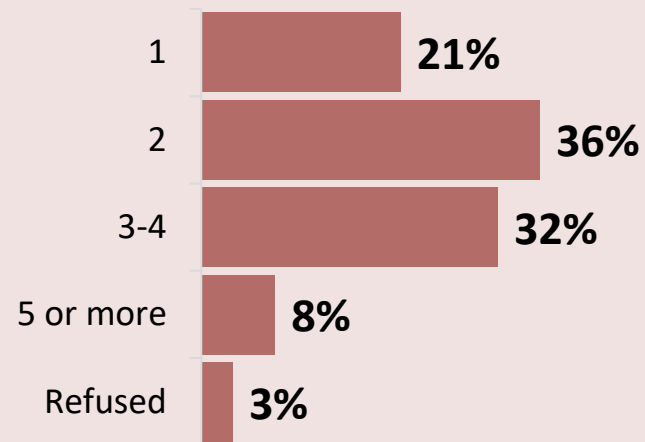
Q64. Do you own or rent your apartment or home?
Q65. How many years have you lived in the Bay Area?
Q71. What was your total household income before taxes for 2018?

Non-Rider Profile: Education & Household Size

Education

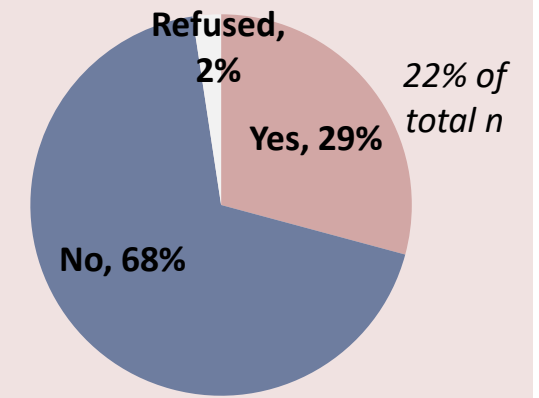


Including yourself, how many people live in your household?



Children under 18?

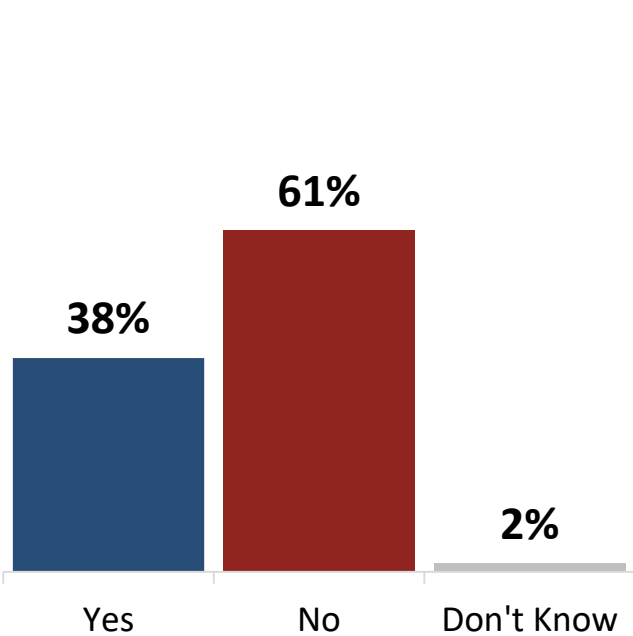
Asked of those who say more than 1 in household; n=952



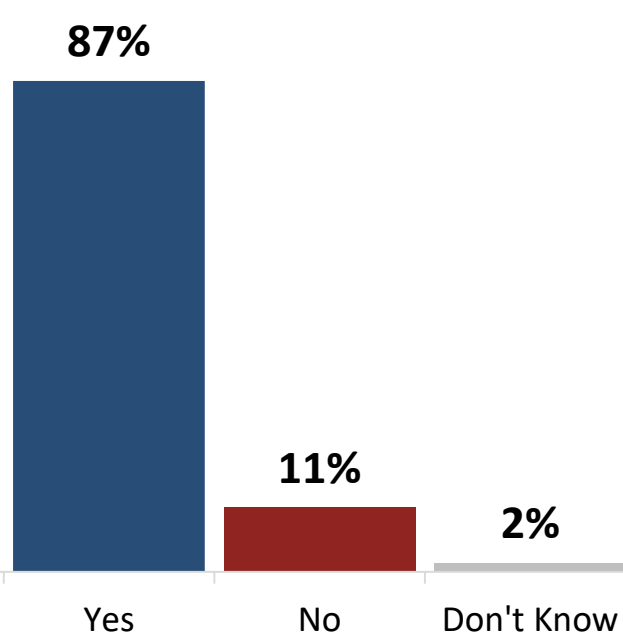
- Q61. What is the last grade you completed in school?
- Q62. Including yourself, how many people live in your household?
- Q63. Do you have any children under the age of 18 in your home?

Non-Rider Profile: Clipper, Vehicle Access, & Bank Accounts

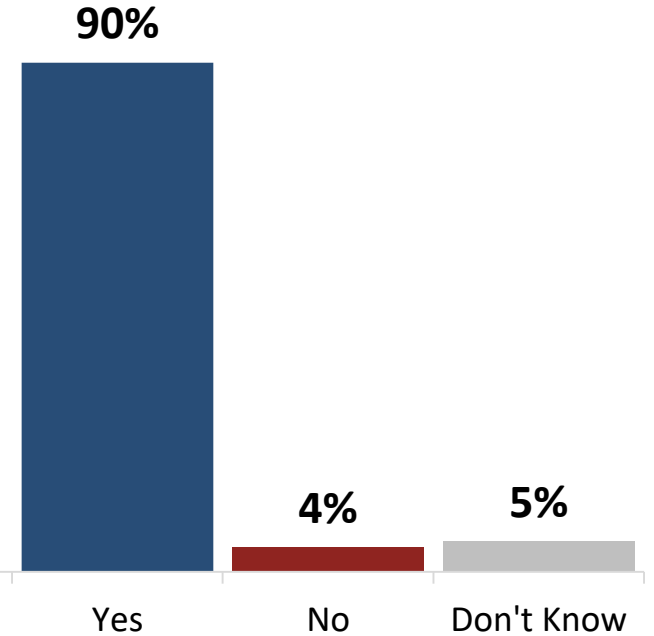
Clipper Card



Access to a Vehicle



Checking/Savings/Credit Card Account for Online Purchases



Q54. Do you have a Clipper Card for riding transit in the Bay Area?

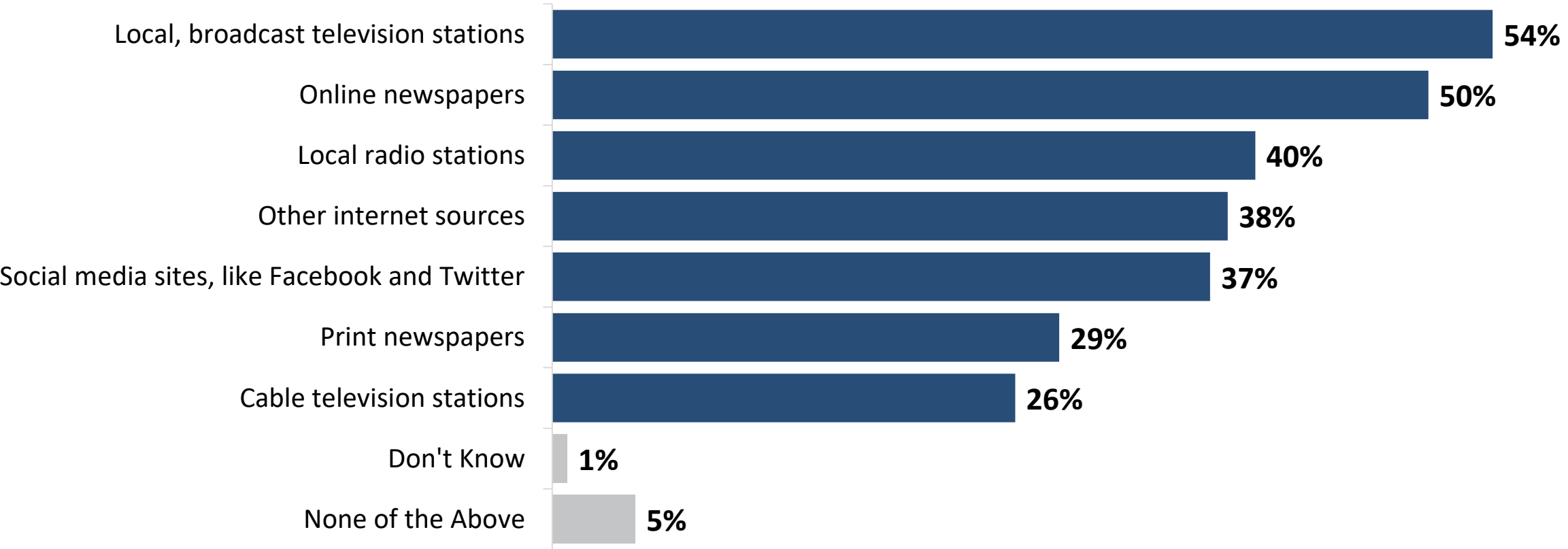
Q55. Do you own or have access to a vehicle you can use, such as a car, truck, or motorcycle?

Q56. Do you have a checking account, savings account, or a credit card account that you can use for online purchases?

Non-Rider Profile: Media Sources



Which of the following do you use to learn about local news, information, and events? Select all that apply.

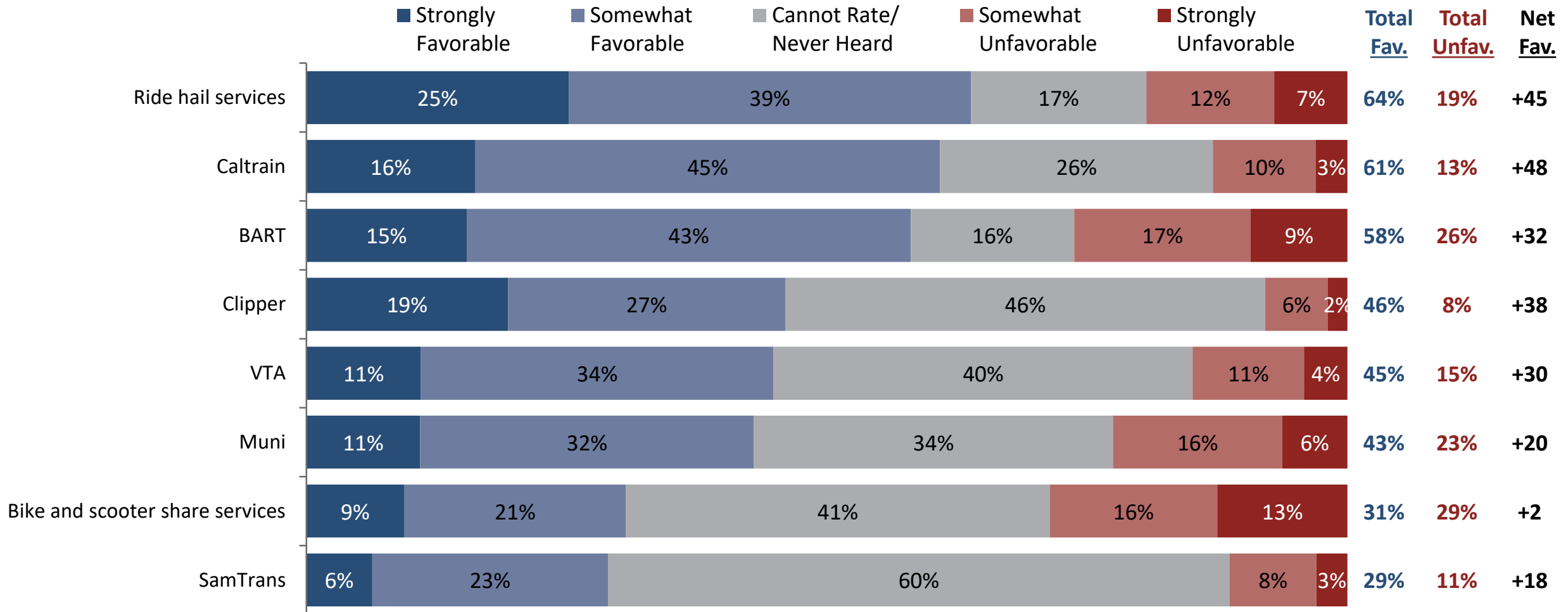




Non-Rider Transportation Modes and Transit Usage

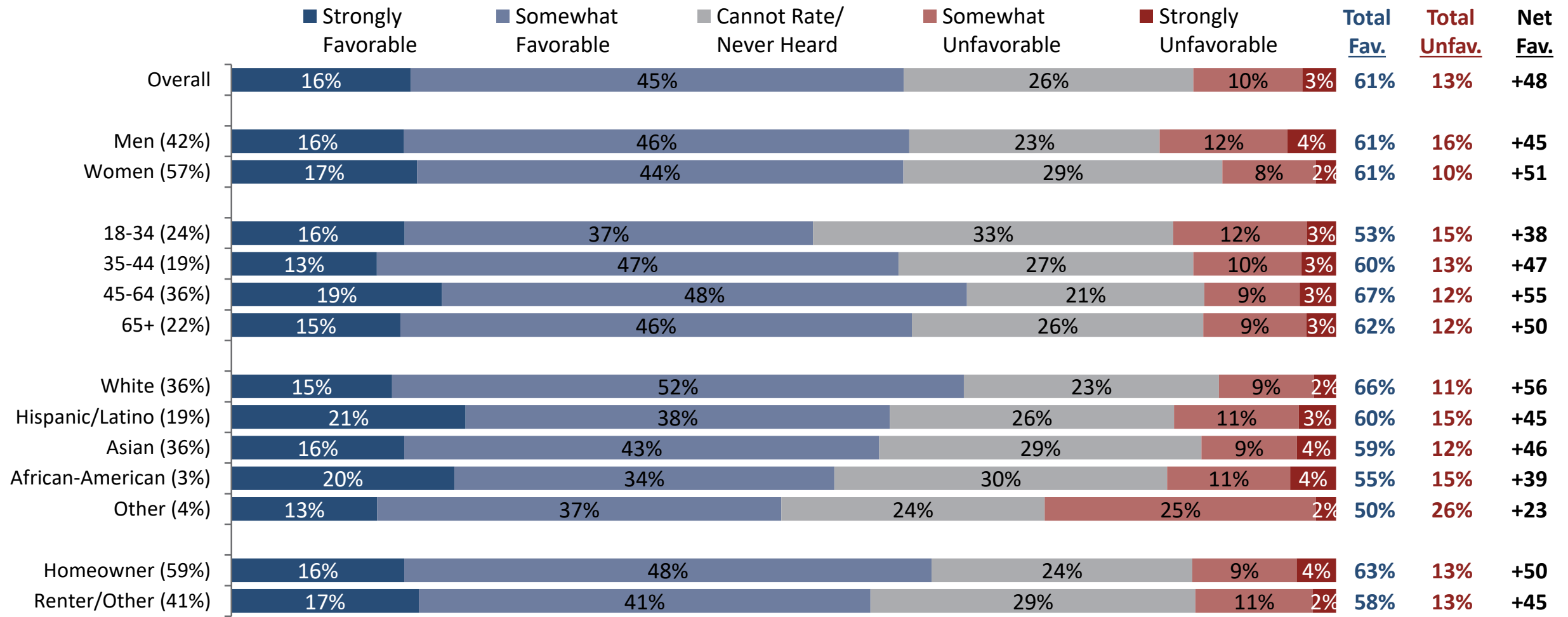
Favorable Ratings of Transportation Modes/Agencies

Caltrain receives the highest net favorable rating of any transportation mode asked.



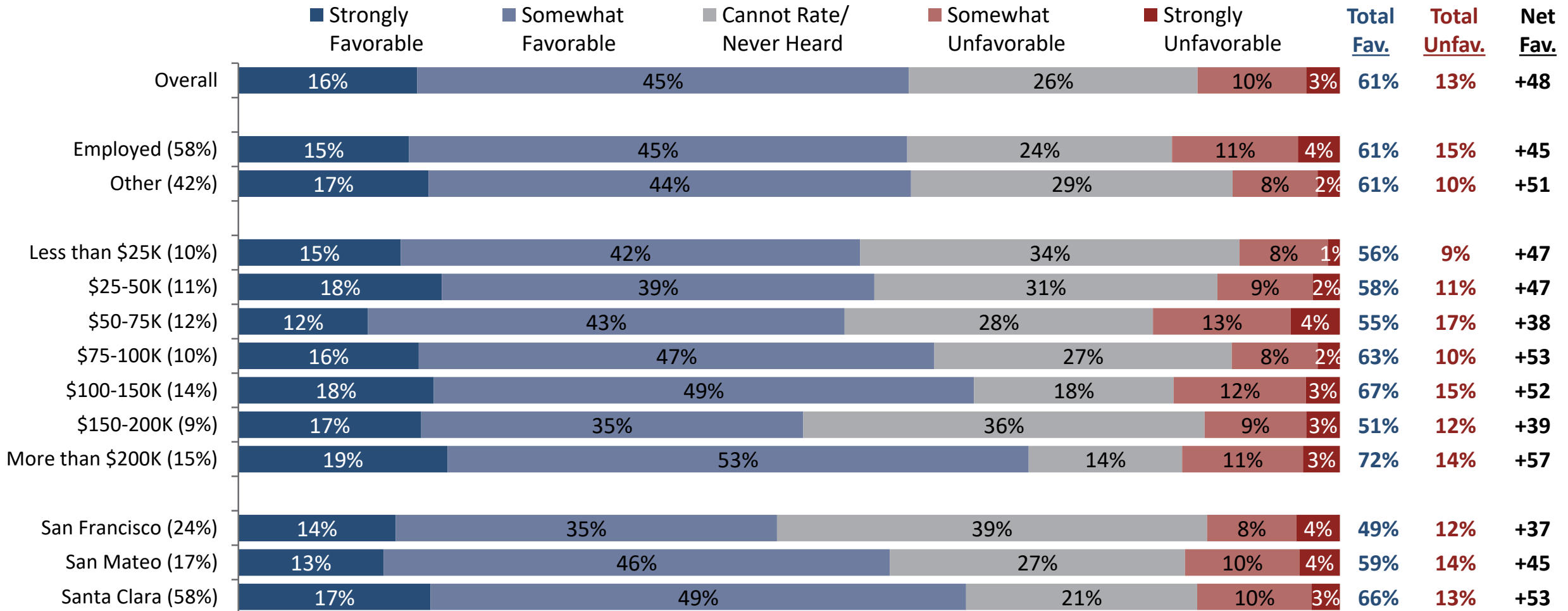
Caltrain Favorable Rating by Subgroups

Non-riders aged 35+ are more likely to rate Caltrain favorably.



Caltrain Favorable Rating by Subgroups

Santa Clara County non-riders are more likely to rate Caltrain favorably, while San Francisco non-riders are more likely to be unable to rate the agency.



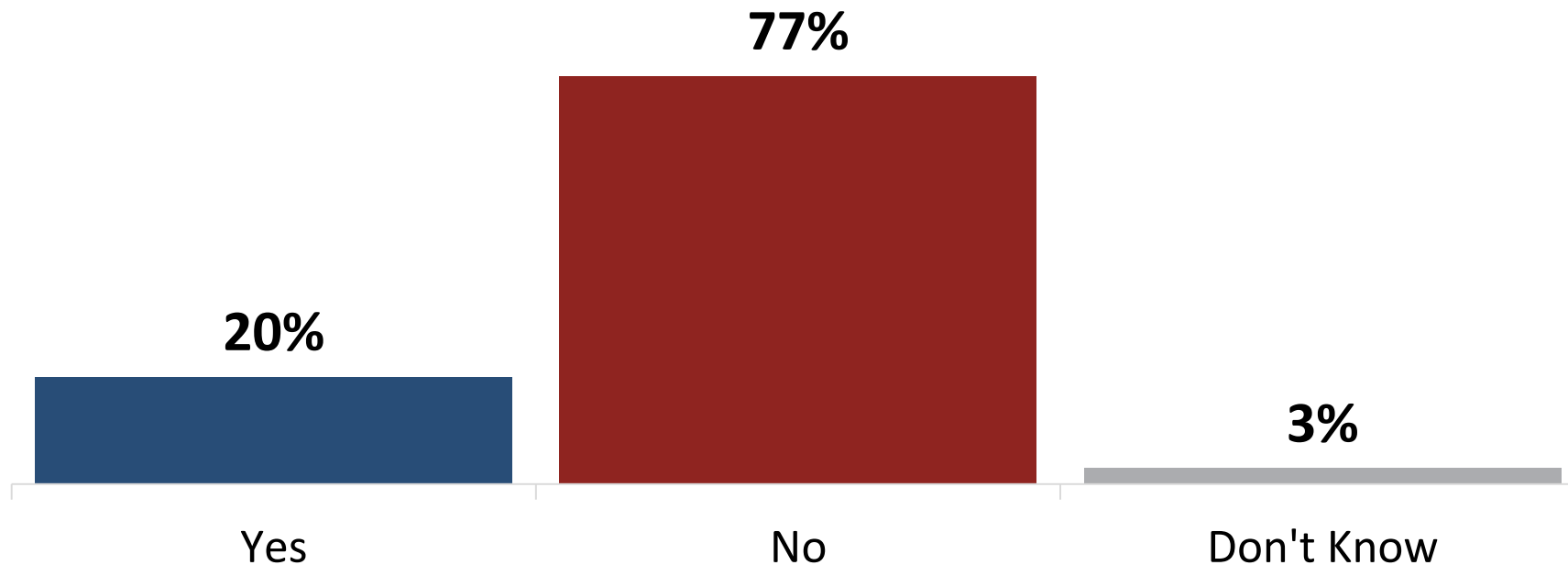
Q5. Below is a list of transportation organizations. Please indicate your opinion of each one ... Caltrain

Income categories do not include those who said "Prefer not to respond" (19%)

Special Event Ridership

One out of five non-riders reported taking Caltrain in the past year for a special event, indicating that some non-riders are familiar with the system, but are only utilizing it under very specific circumstances.

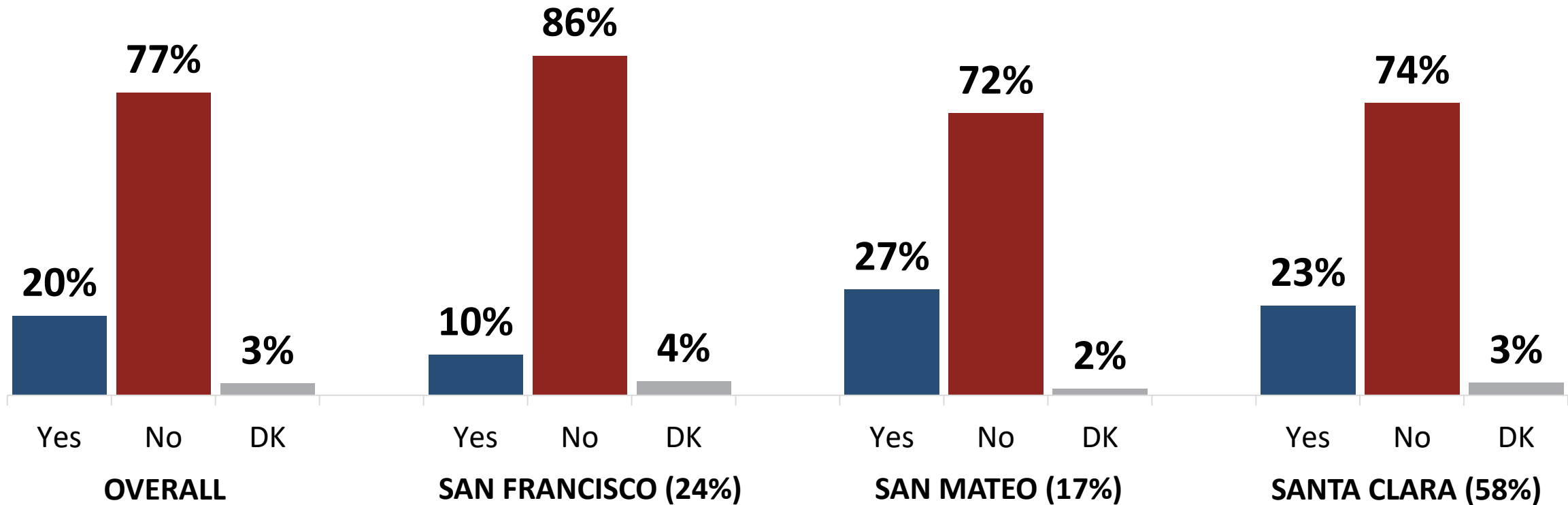
In the past year, have you ridden Caltrain to one or more special events in the Bay Area, like a concert, sporting event, or festival?



Special Event Ridership by County

Non-riders in San Mateo and Santa Clara Counties were significantly more likely to take Caltrain for a special event than those in San Francisco.

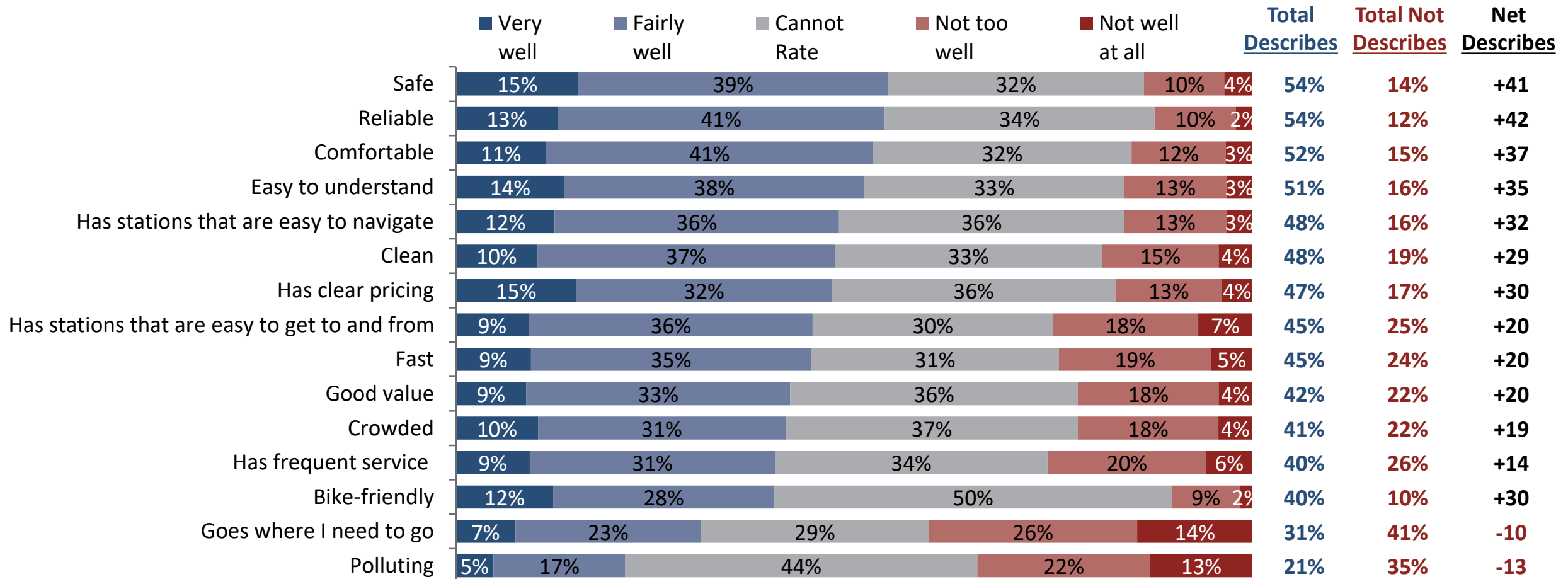
In the past year, have you ridden Caltrain to one or more special events in the Bay Area, like a concert, sporting event, or festival?



Q53. In the past year, have you ridden Caltrain to one or more special events in the Bay Area, like a concert, sporting event, or festival?

Caltrain Attributes

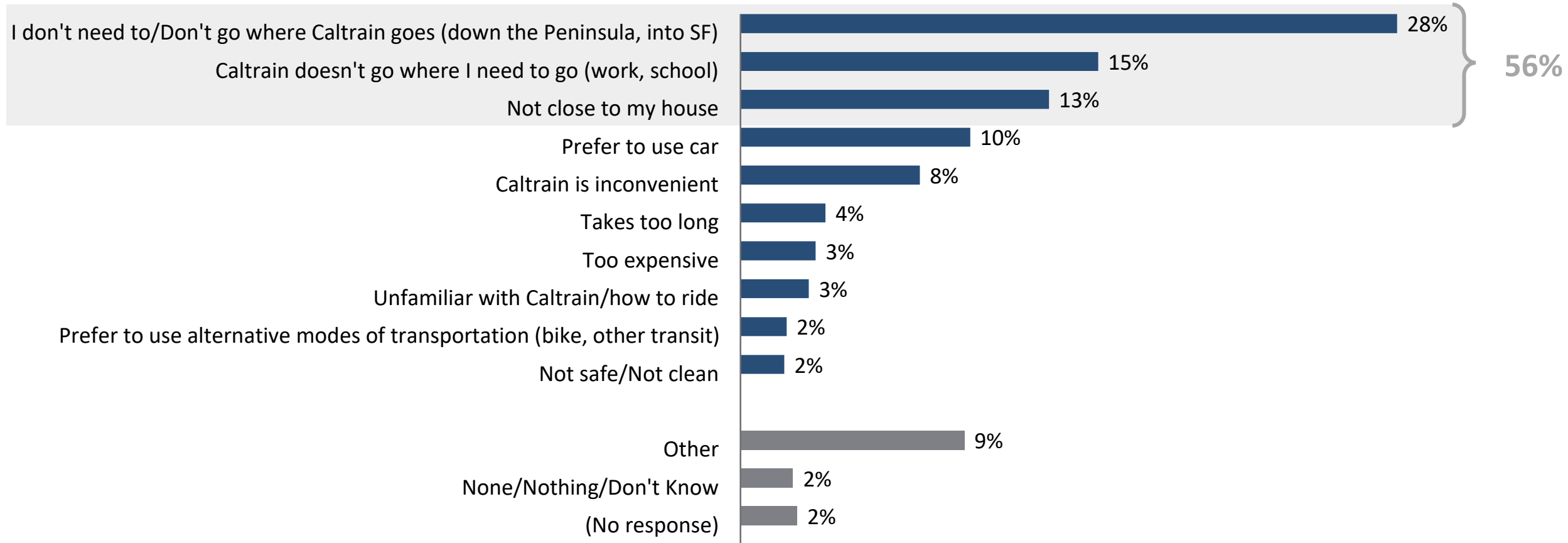
About third to half of non-riders cannot rate Caltrain on its attributes, but the attribute the most non-riders are able to rate it on is “goes where I need to go”, which receives a negative net rating, along with “polluting”. Positive attributes, like “safe”, “reliable”, and “comfortable” received the highest net positives.



Q36-50. For each of the following, please indicate how well that word or phrase describes Caltrain, whether or not you ride Caltrain regularly.

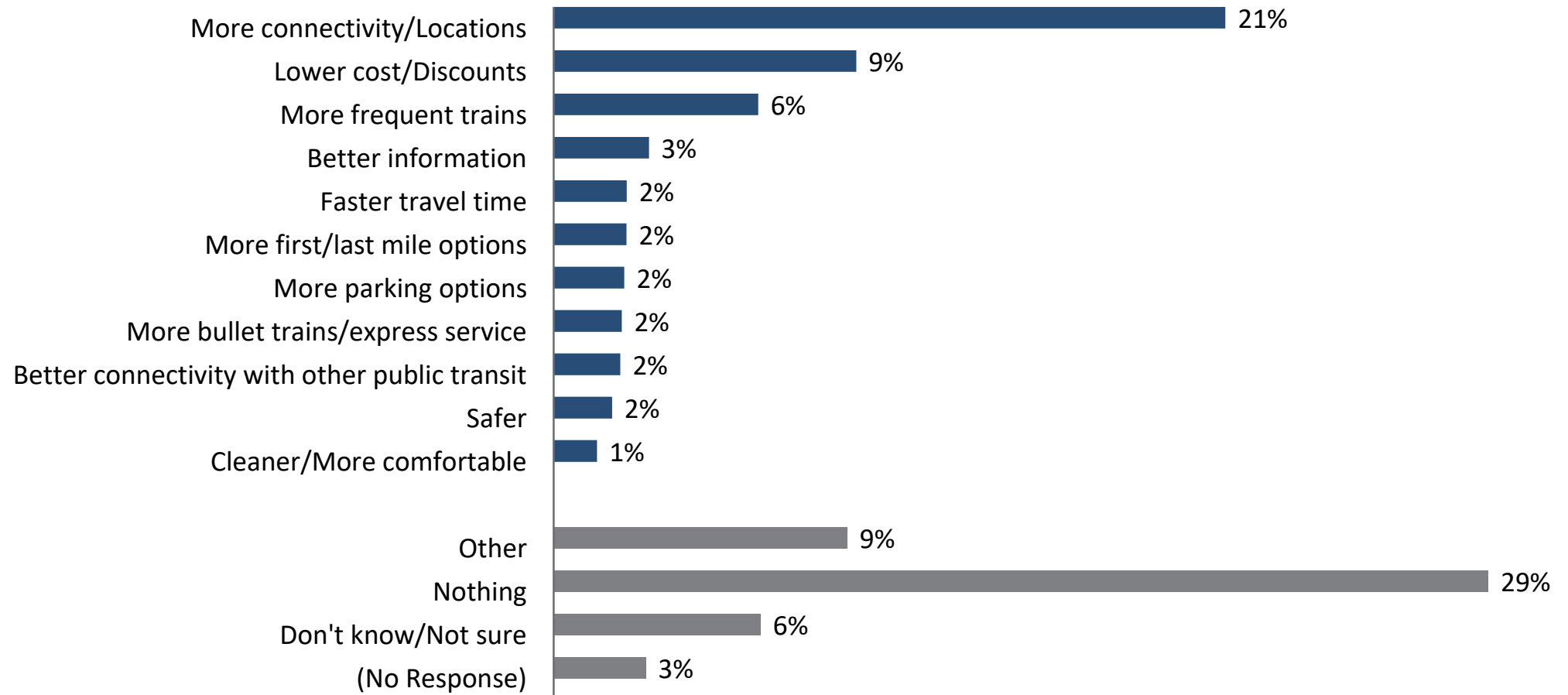
Main Reasons for Not Riding Caltrain

Major reasons for not riding Caltrain align with the attribute rating for “goes where I need to go” – non-riders don’t go where Caltrain goes (such as down the Peninsula, or into the City), Caltrain doesn’t go close to their destinations like work or school, or Caltrain stations are not close to their home.



What Could Caltrain Do to Increase Ridership

Having more connectivity or locations, lower ticket/pass costs, and more frequent trains were the top three ways non-riders said that Caltrain could increase their ridership.

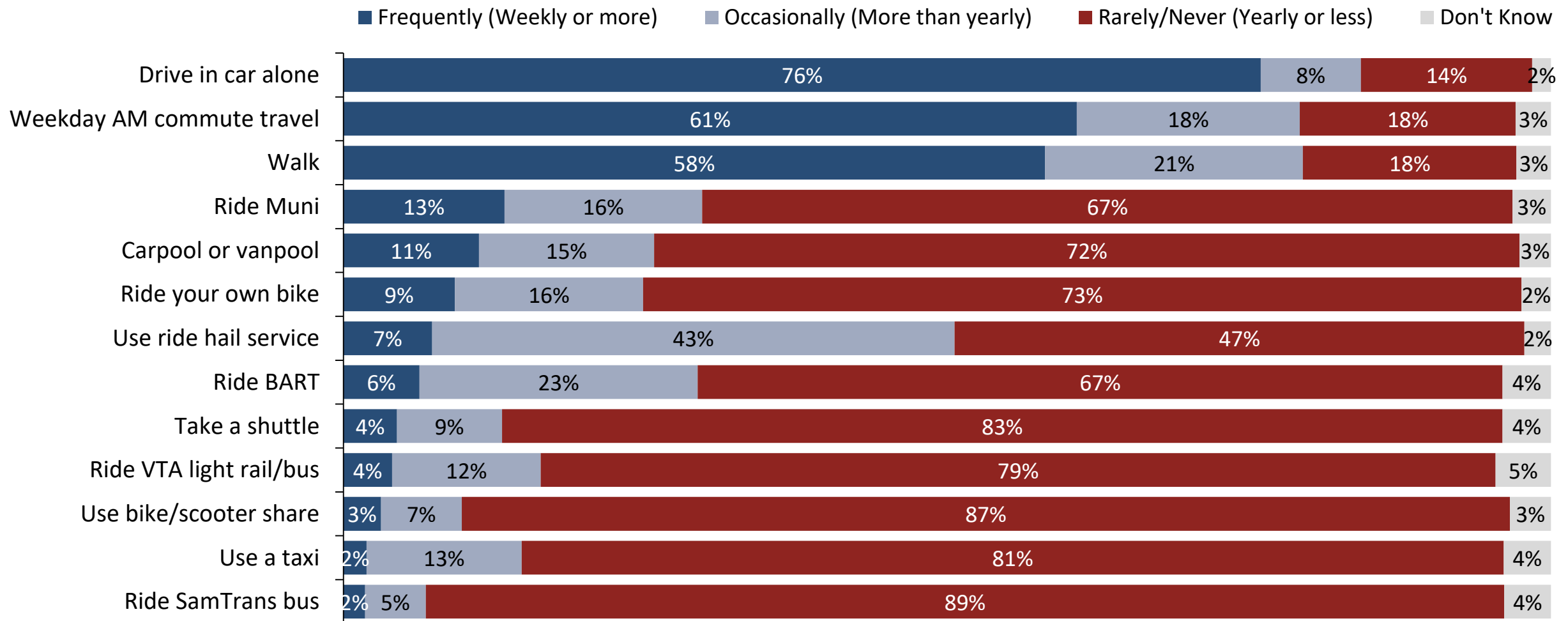




Non-Riders: Current Transit Behaviors

Methods of Transportation

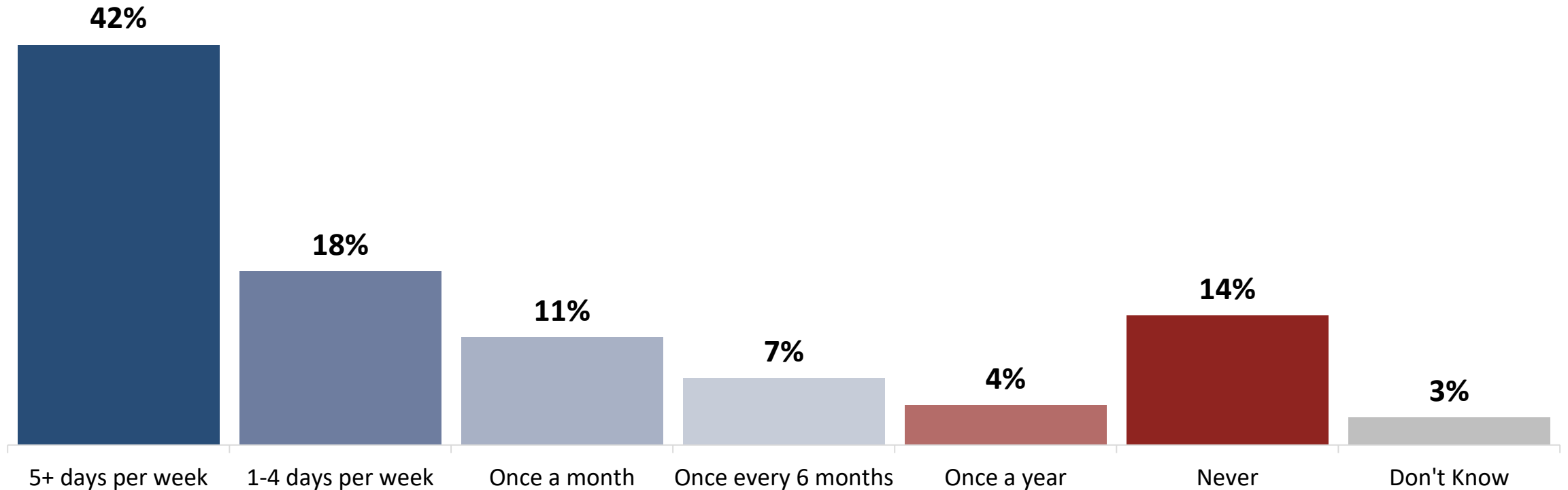
Over three-quarters of non-riders report using their car at least once a week. The most commonly-used public transit agencies used by non-riders are those in San Francisco: Muni and BART.



Q11-23. Typically, how often do you use each of the following as a method of transportation?

Travel During Weekday Morning Commute

Over half of non-riders are travelling during standard morning commute hours at least once a week.



Q24. Thinking about your typical week, how often are you traveling during the weekday morning commute hours (approximately 7 to 9 AM)?

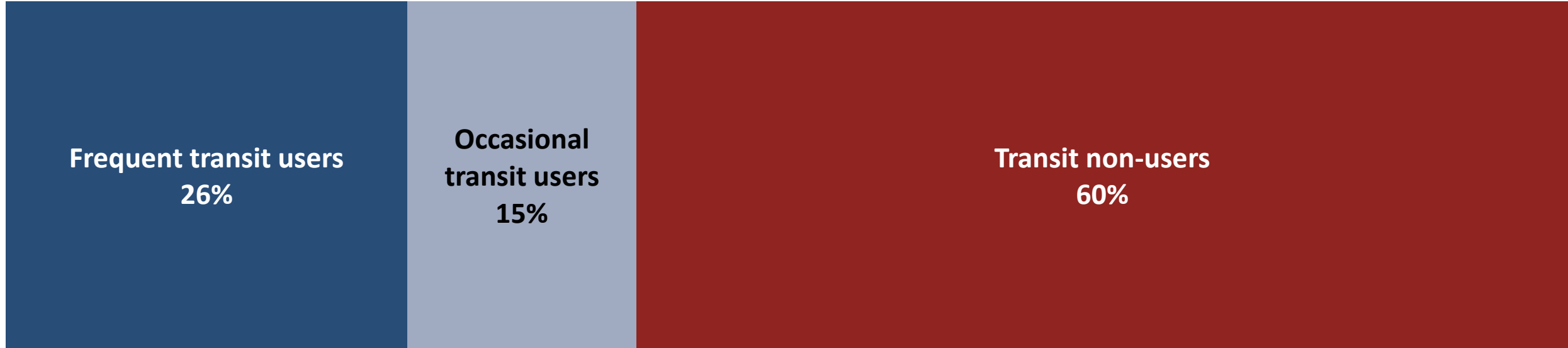
Current Behaviors Segmentation

A quarter of non-riders are using at least one form of alternative transportation weekly or more. An additional 15% are already occasionally utilizing modes of alternative transportation.

Frequent transit users: Ride Muni, bike, bike/scooter share, BART, VTA, or SamTrans frequently (weekly or more)

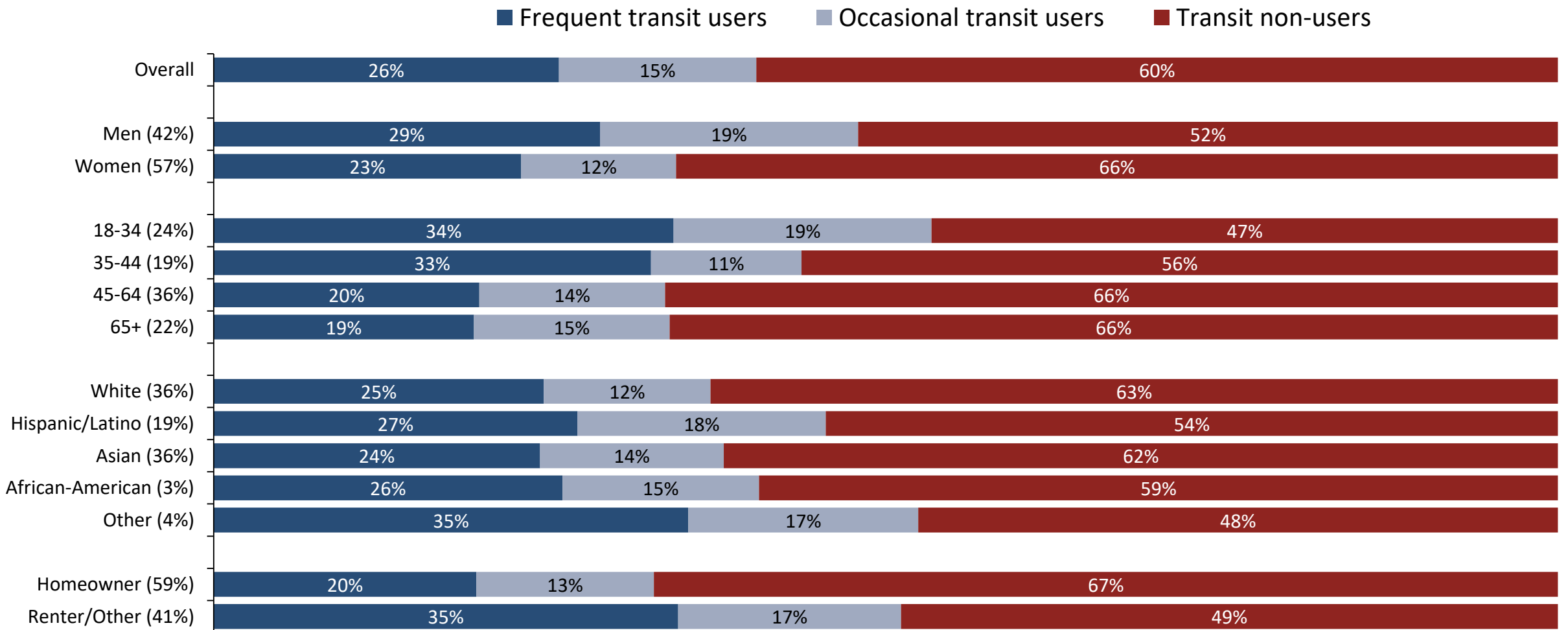
Occasional transit users: Not a transit rider, but occasionally ride at least two of the above services (more than yearly)

Transit non-users: All others



Current Behaviors Segmentation by Subgroups

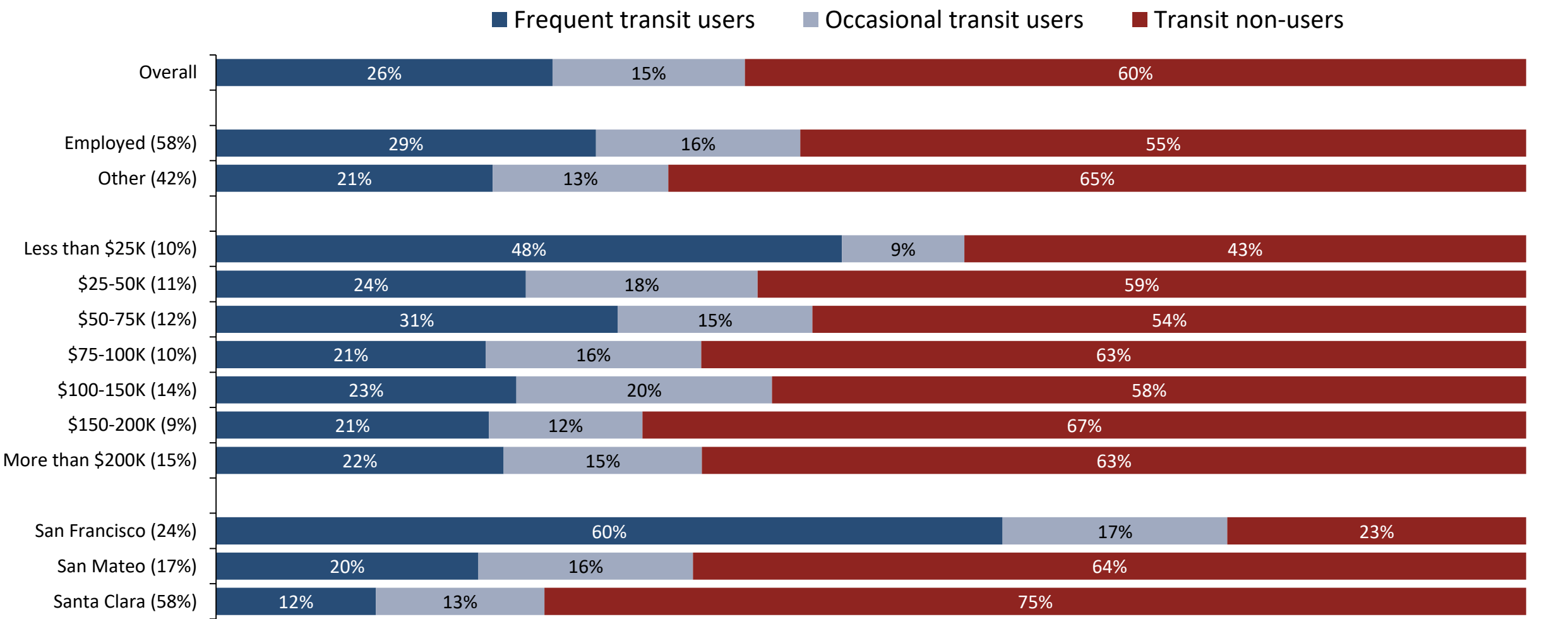
Younger non-riders are more likely to be frequent or occasional transit users, as are renters.



Q11-23. Typically, how often do you use each of the following as a method of transportation?
 Segmentation based on Muni, bike, bike/scooter share, BART, VTA, and SamTrans ridership

Current Behaviors Segmentation by Subgroups

Non-riders in San Francisco are the most likely to be frequent transit users, but non-riders in San Mateo are equally as likely to be occasional transit riders.

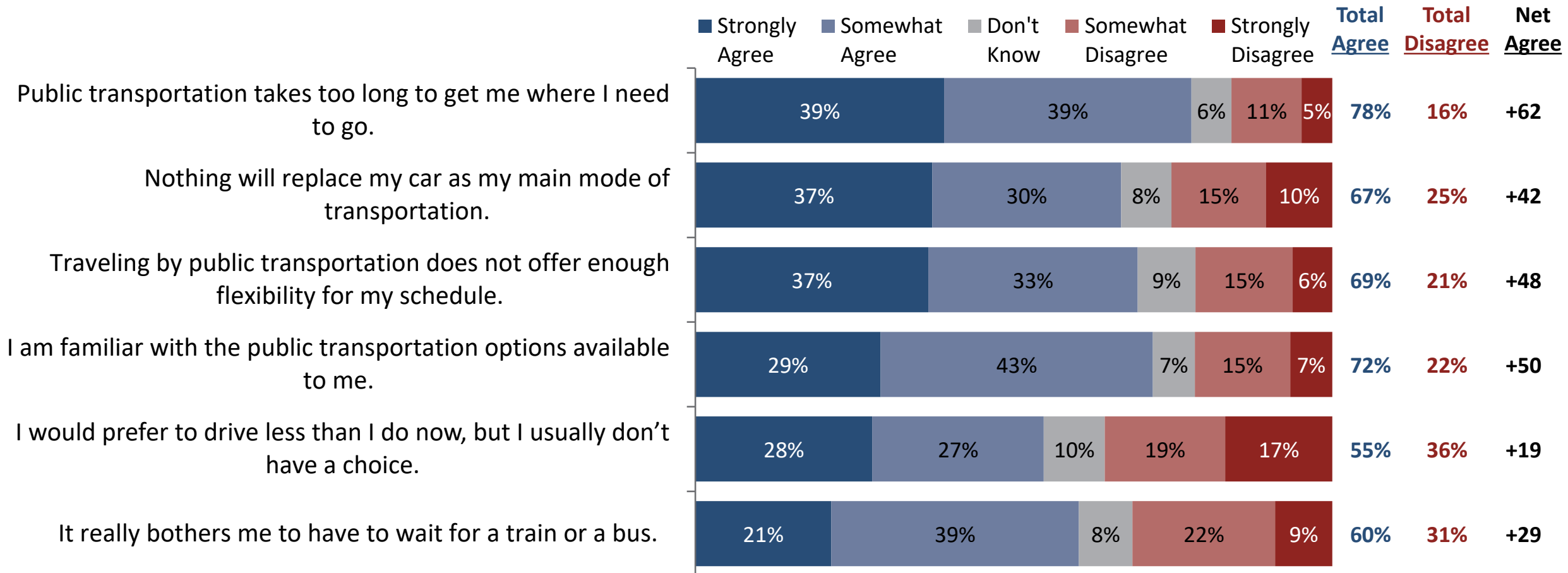




Non-Riders: Transit Attitudes

Statements about Public Transportation

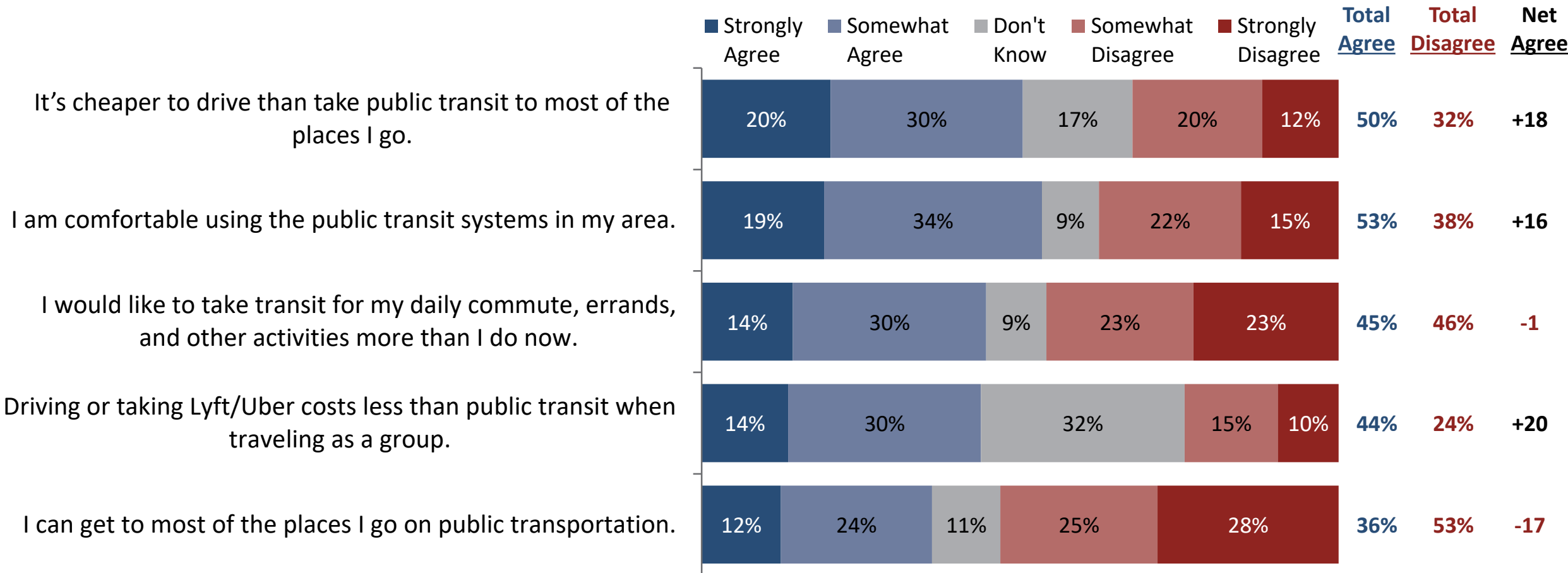
Nearly four out of five non-riders agree that public transportation takes too long, and two-thirds agree that public transportation isn't flexible enough for their schedule and that nothing will replace their car. However, less than a third strongly agree that they are familiar with available public transportation options.



Statements about Public Transportation (cont.)



Half of non-riders state they are comfortable using their local public transit systems. Only a third say they can get to most of the places they go on public transportation.

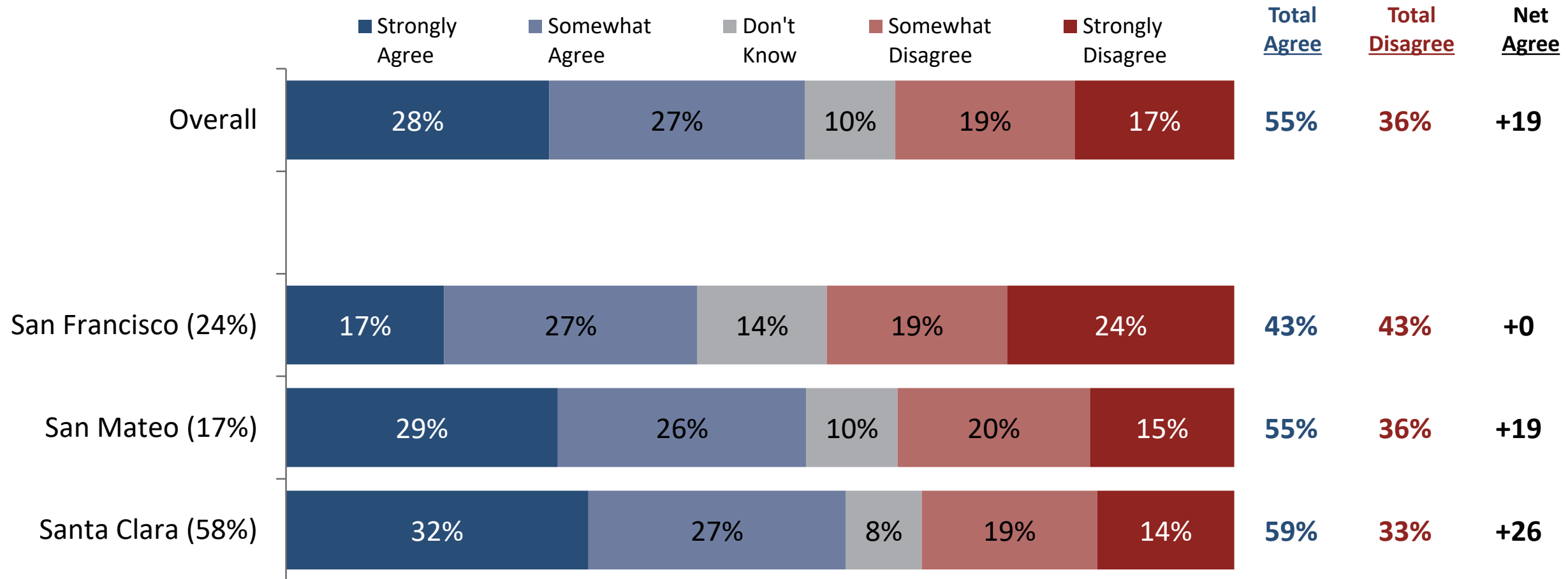


Q25-35. Please indicate whether or not you agree with the statements below.

“Prefer to Drive Less but Don’t Have Choice” by County

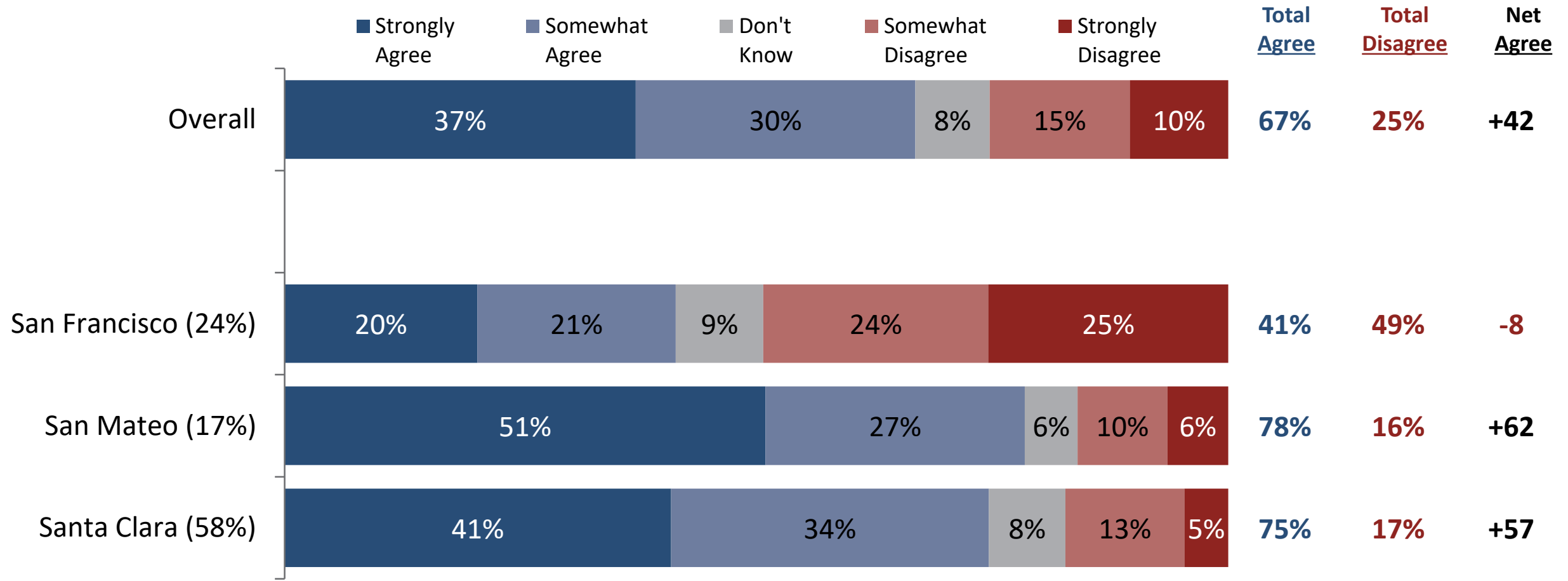


Over half of non-riders in both San Mateo and Santa Clara counties say they would prefer to drive less, but don’t have a choice not to.



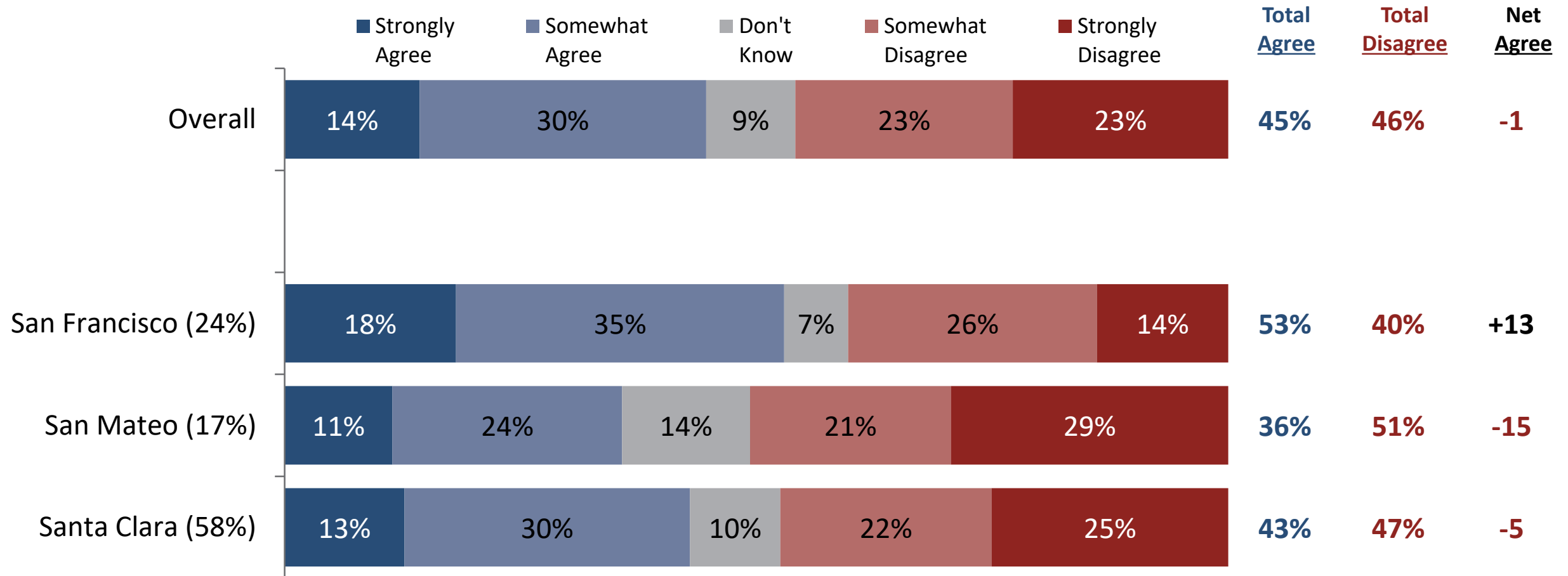
“Nothing Will Replace my Car” by County

Three-quarters of non-riders in San Mateo and Santa Clara Counties say that nothing will replace their car as their main mode of transportation.



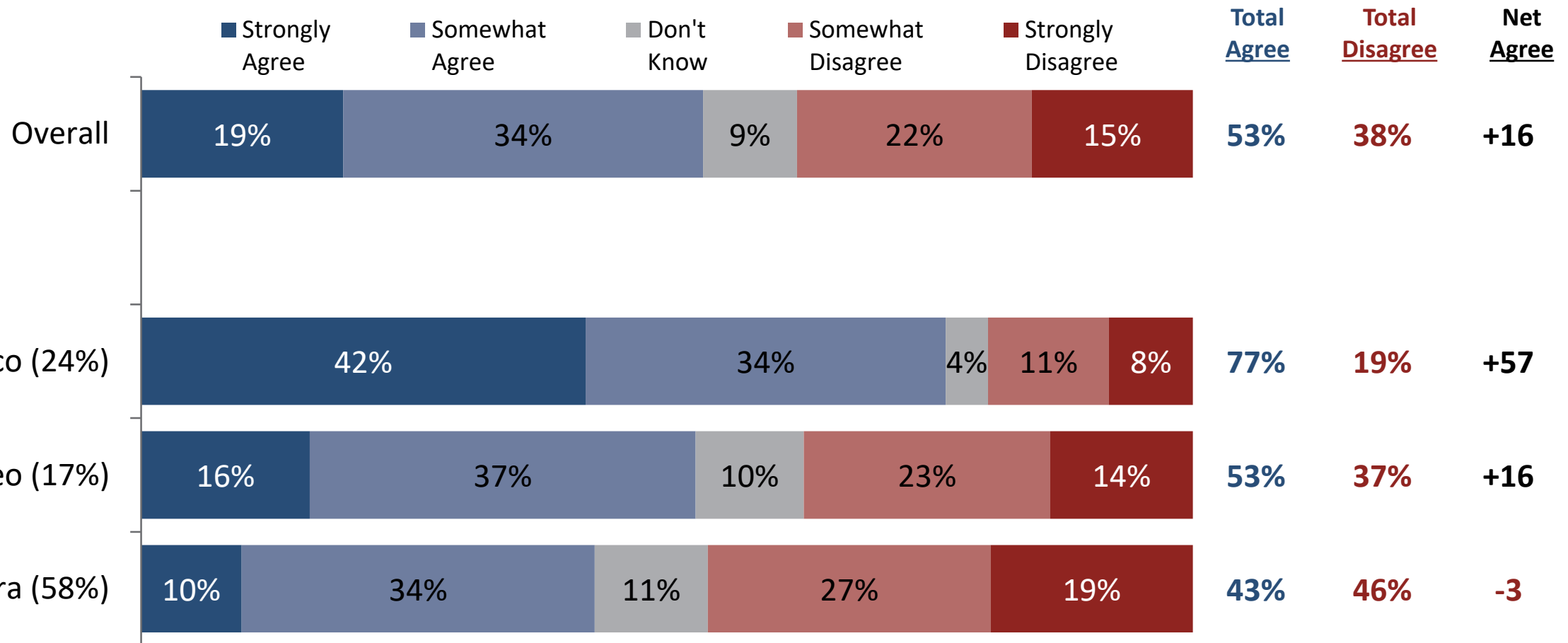
“Would Like to Take Transit More” by County

At least a third of non-riders in each county report that they would like to transit more.



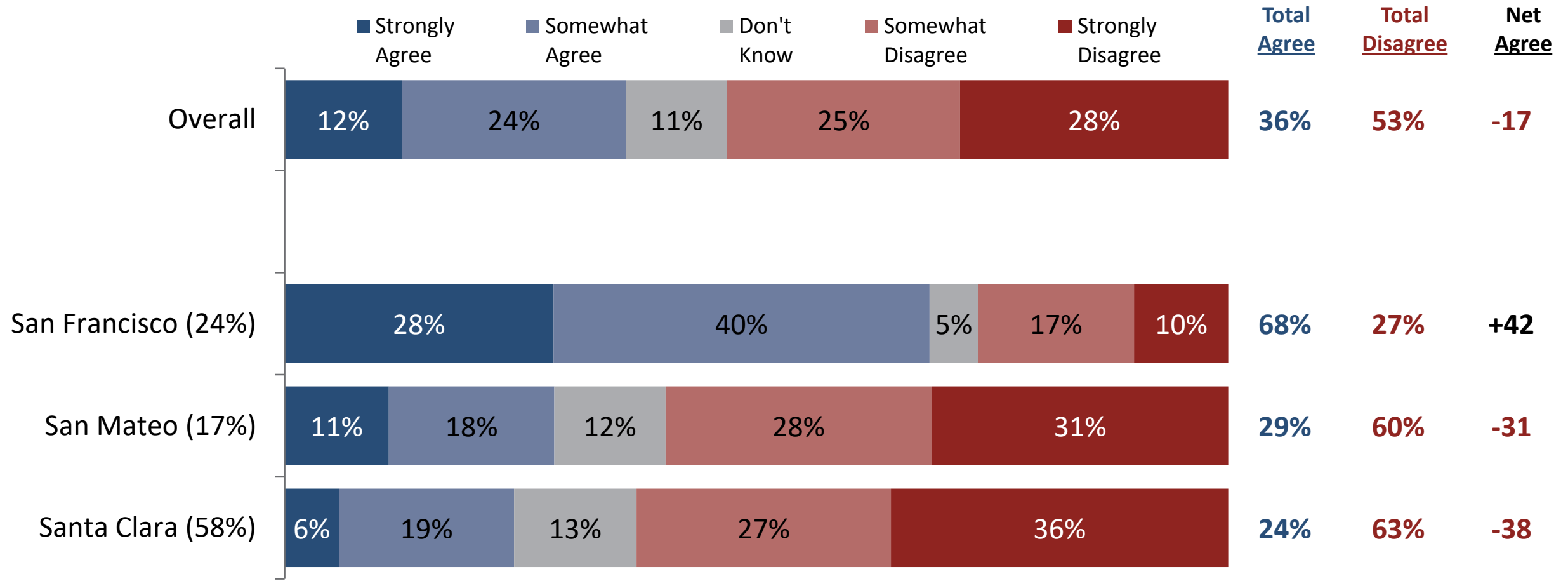
Q30. Please indicate whether or not you agree: *I would like to take transit for my daily commute, errands, and other activities more than I do now.*

“Comfortable Using Transit in My Area” by County



“Can Get Most Places I Go by Public Transit” by County

Only a quarter of residents in San Mateo and Santa Clara counties report that they can get to most of the places they go on public transportation.



Transit Attitudes Segmentation

More than two-fifths of non-riders have attitudes that indicate they would like to drive less, but transit currently doesn't work for their schedules.

Prefer to drive less/transit not flexible: Agree both that “Traveling by public transportation does not offer enough flexibility for my schedule” and “I would prefer to drive less than I do now, but I usually don't have a choice”

Do not prefer to drive less: Disagree with “I would prefer to drive less than I do now, but I usually don't have a choice”

Else: All others

Prefer to drive
less/transit not flexible
44%

Else
20%

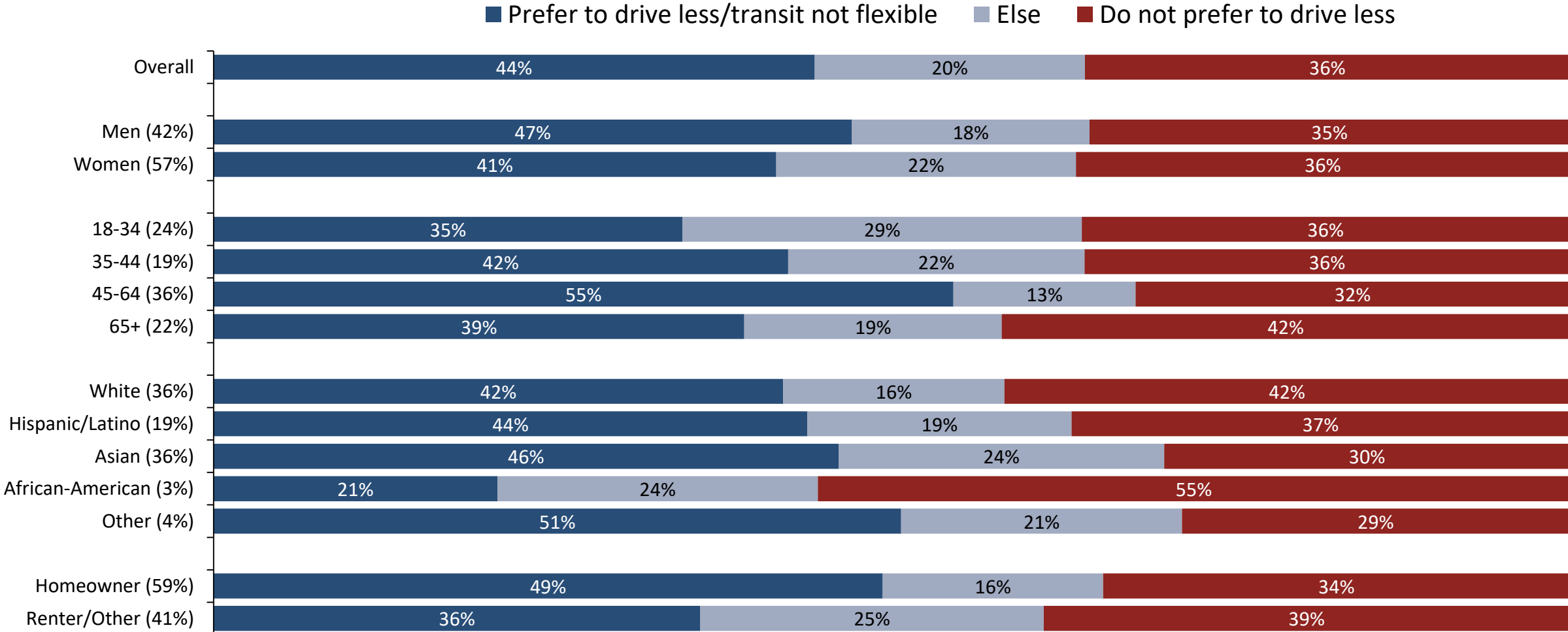
Do not prefer to drive
less
36%

Please indicate whether or not you agree with the following statements:
 Q25. *Traveling by public transportation does not offer enough flexibility for my schedule.*
 Q28. *I would prefer to drive less than I do now, but I usually don't have a choice.*

Transit Attitudes Segmentation by Subgroups

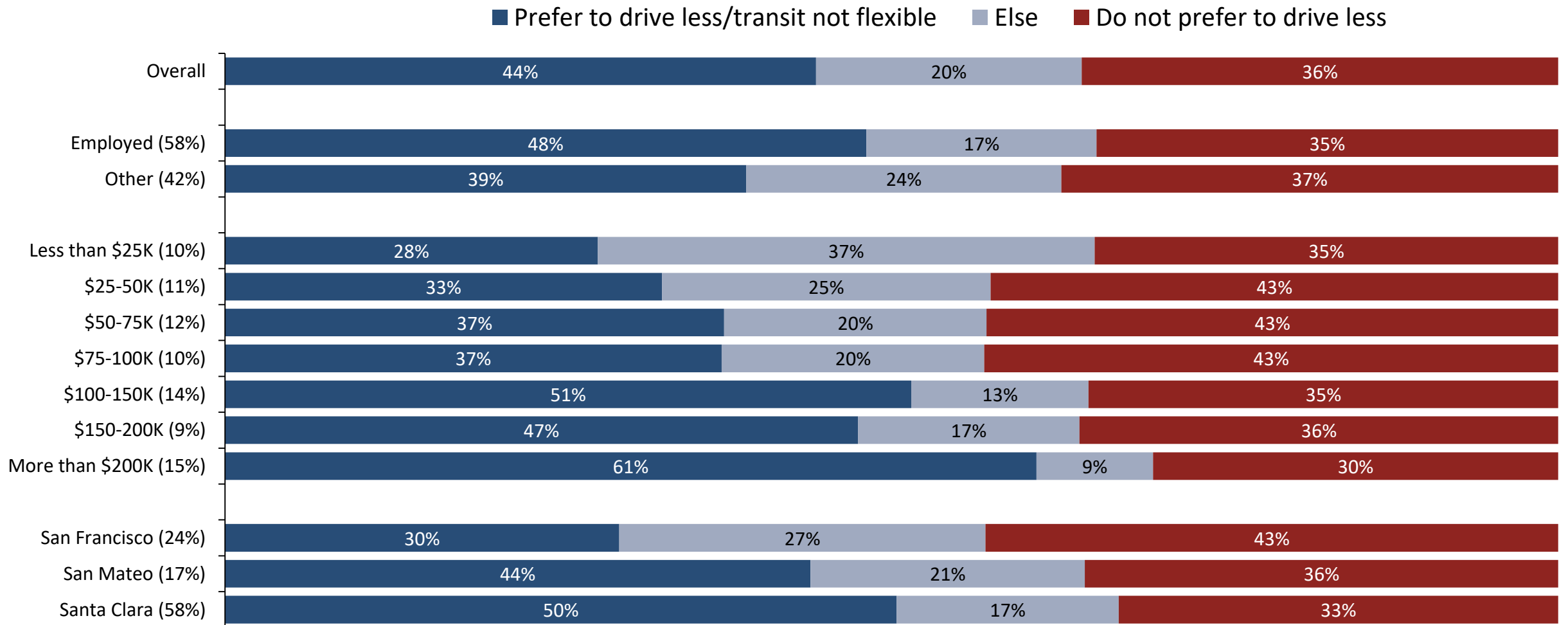


Non-riders aged 45-64 and homeowners are more likely to express the attitudes that they would like to drive less, but transit doesn't currently work for their schedules.



Transit Attitudes Segmentation by Subgroups

Employed, higher-income, and non-riders in Santa Clara County are more likely to say that they would like to drive less, but that transit doesn't currently work for their schedules.





Non-Rider Index

Non-Rider Index Definition

- ▶ The Non-Rider Index was created to identify non-riders who are open to riding Caltrain, with assigned index values range from -1 to +11. This index was calculated by assigning points for the listed survey question responses:
 - +1 – Rated Caltrain favorably
 - +1 – Ride SamTrans at least once every six months
 - +1 – Ride BART at least once every six months
 - +1 – Ride Muni at least once every six months
 - +1 – Ride VTA at least once every six months
 - +1 – Agree they would prefer to drive less
 - +1 – Disagree that nothing will replace a car
 - +1 – Agree they would like to take transit more
 - +1 – Agree they are comfortable using transit
 - +1 – Ride Caltrain to special events
 - +1 – Have Clipper card
 - -1 – Can't rate/never heard of Caltrain

Non-Rider Index

One-fifth of non-riders exhibit actions and/or have attitudes that indicate that they are the most open of all non-riders to riding Caltrain. An additional fifth fall into a middle category of being somewhat open to using the system.

Most open (7 or more): Respondents who are most likely to ride Caltrain under the right circumstances.

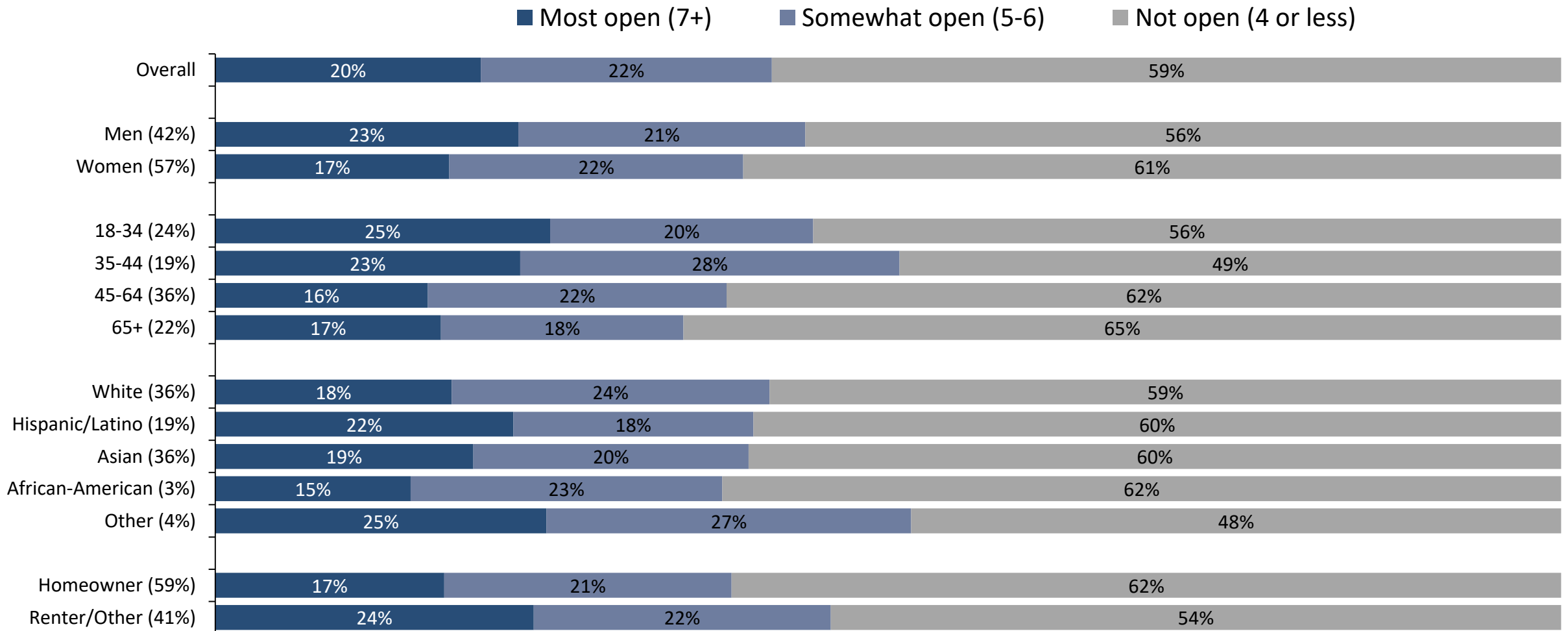
Somewhat open (5-6): Respondents who scored lower on the scale, but show indications of being open to riding Caltrain.

Not open (4 or less): Respondents who are unlikely to ride Caltrain



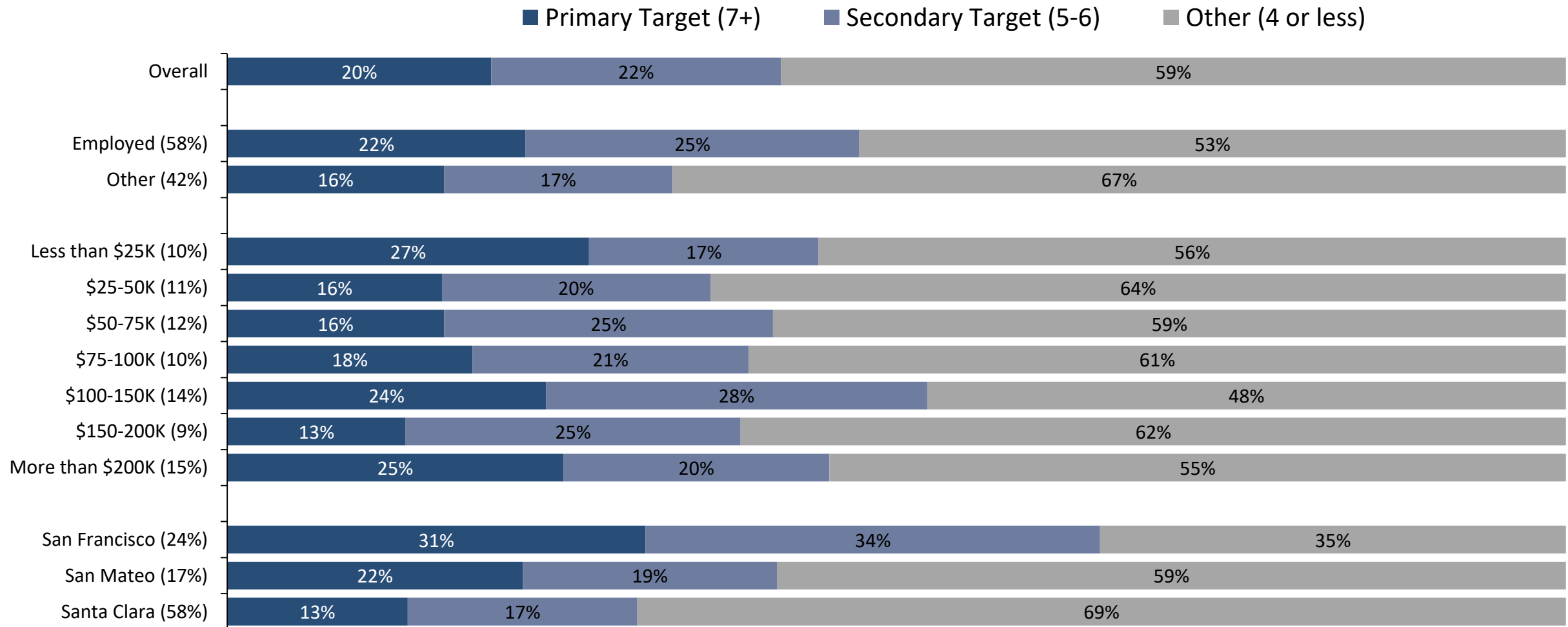
Non-Rider Index by Subgroups

Men, renters, and younger people are more likely to be in the Most Open group.



Non-Rider Index by Subgroups

Those currently employed and those in San Francisco County are more likely to be in the Most Open group.





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