

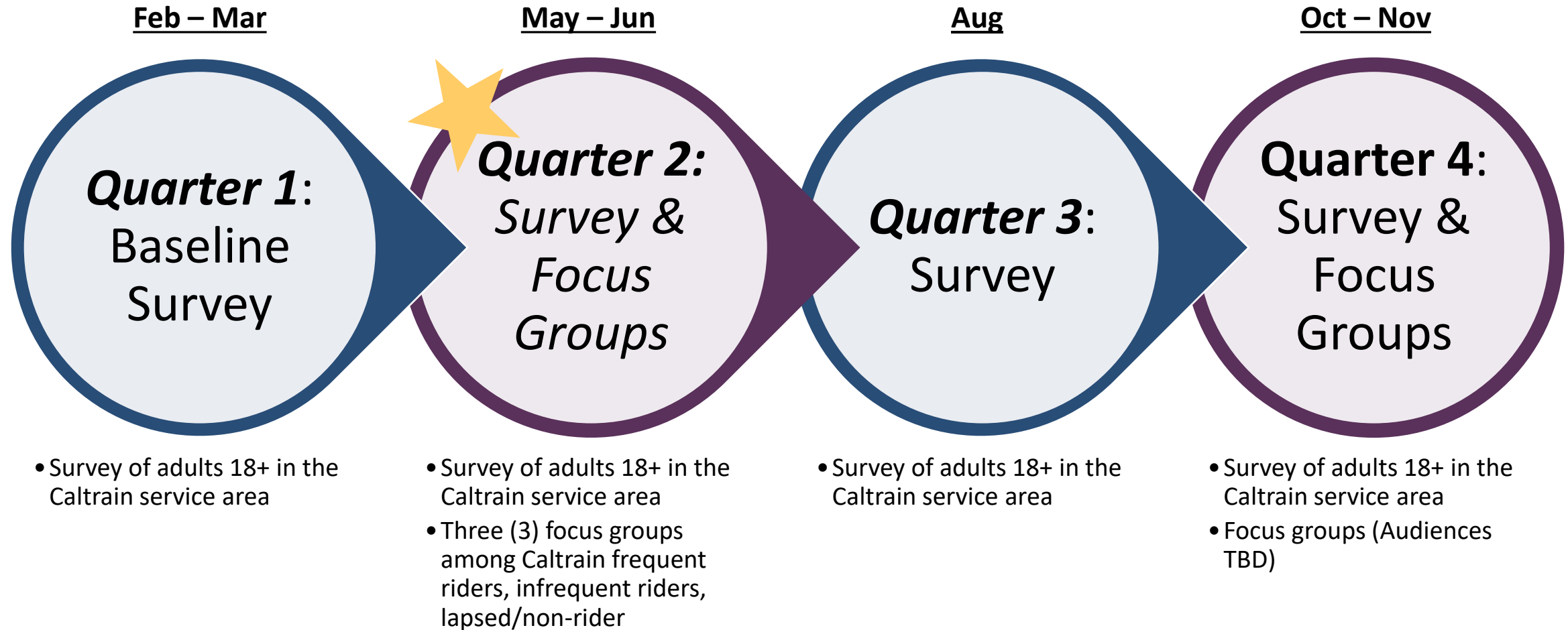


# Q2 2023 Caltrain Ridership Growth Survey & Focus Groups June 2023

# Project Purpose

- ▶ Track various aspects of residents' travel and commute behavior throughout the San Francisco Peninsula, and understand how their behavior may change in the future;
- ▶ Measure awareness and perceptions surrounding public transit and Caltrain, specifically, including various aspects of the Agency's communications and the electrification of its system;
- ▶ Identify key barriers to riding Caltrain, with a focus on potential factors and incentives for switching from driving alone to riding public transit;
- ▶ Gauge priorities for service improvement and expansion efforts and interest in concepts like new fare products and other potential service amenities;
- ▶ Understand demographic, behavioral, and attitudinal characteristics of riders, non-riders, and potential riders.

# Overview of 2023 Opinion Research



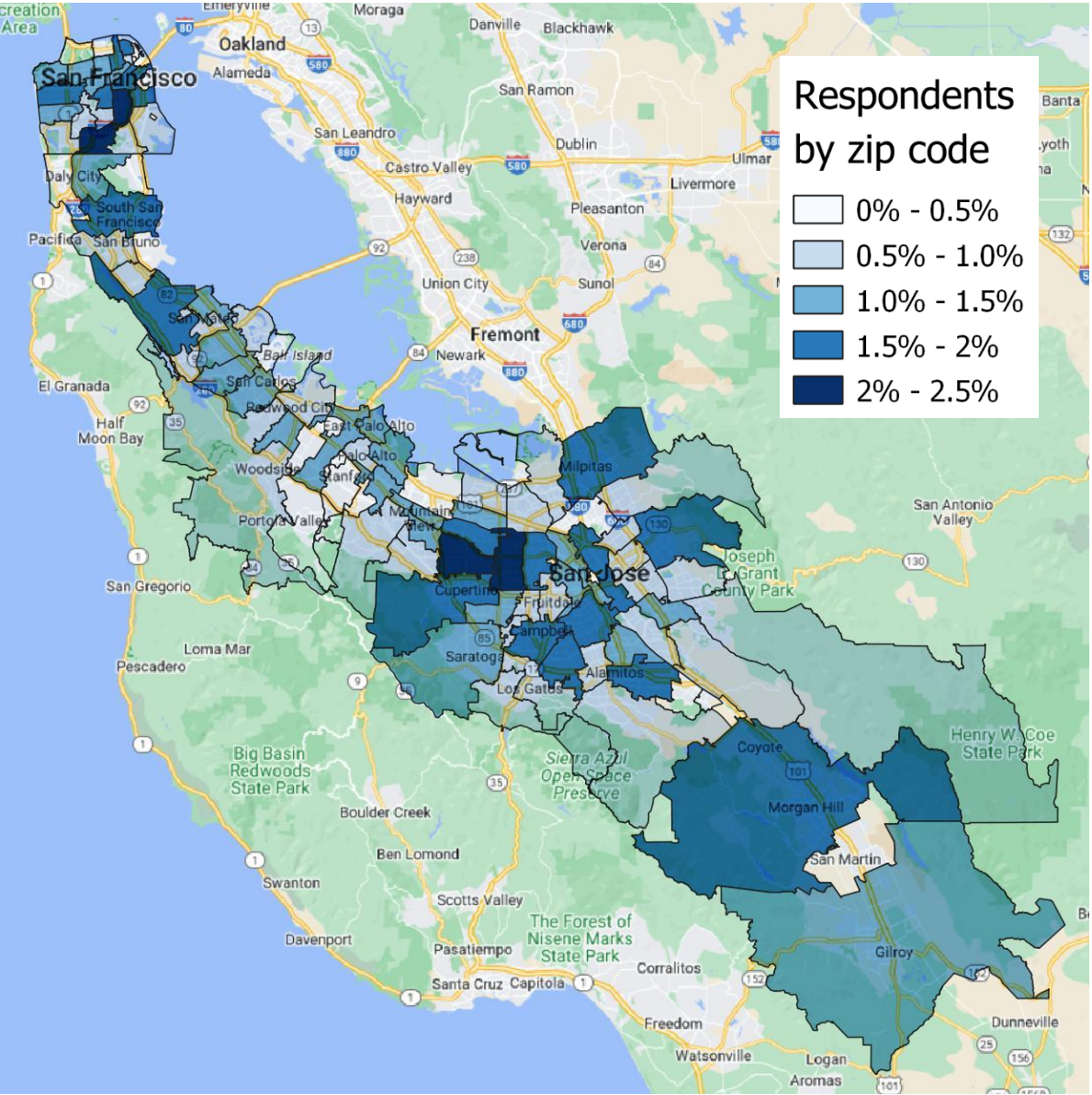


# Resident Survey Methodology & Key Findings

- ▶ Quarterly online survey of adult residents in communities served by Caltrain throughout San Francisco, San Mateo, and Santa Clara Counties
- ▶ Respondents invited to participate via email and text-to-web
- ▶ **Combined Q1 and Q2:** 3,348 interviews; margin of error  $\pm 1.7$  percentage points
  - **Quarter 2 (independent random sample survey of adult residents):**
    - Survey conducted May 8-22, 2023
    - 1,816 interviews; margin of error  $\pm 2.3$  percentage points
  - **Quarter 1 (independent random sample survey of adult residents):**
    - Survey conducted February 23 – March 15, 2023
    - 1,532 interviews; margin of error  $\pm 2.3$  percentage points
- ▶ Surveys were conducted in English, Spanish, Chinese, and Vietnamese

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

# Survey Region Map



► Peninsula-corridor residents were sampled from selected zip codes in communities served by the Caltrain rail line.

County of Residence	% of Respondents (Weighted)	
	Q1	Q2
San Francisco	27%	27%
San Mateo	18%	18%
Santa Clara	55%	55%

# General Key Findings

- ▶ In the first half of 2023, most travel and Caltrain perception benchmarks have remained largely steady between Quarter 1 (Winter) and Quarter 2 (Spring).
- ▶ Most residents primarily depend on driving alone for their typical transportation needs.
- ▶ Only a small proportion of Peninsula residents – approximately one in ten – utilize Caltrain’s service on a monthly basis, while roughly a third use it a few times a year for occasional trips.
- ▶ Regional residents hold favorable opinions of Caltrain, overall. Regular riders (those who ride Caltrain at least monthly) are largely satisfied with the Agency. Less frequent and lapsed riders are also generally favorable of Caltrain, albeit with less certainty.
- ▶ Despite being highly regarded by those who use it frequently, Caltrain still faces some concerns surrounding its convenience. Although the service is widely viewed as safe and comfortable, respondents have expressed dissatisfaction with the lack of convenience at the stations and the inadequate frequency of trains.

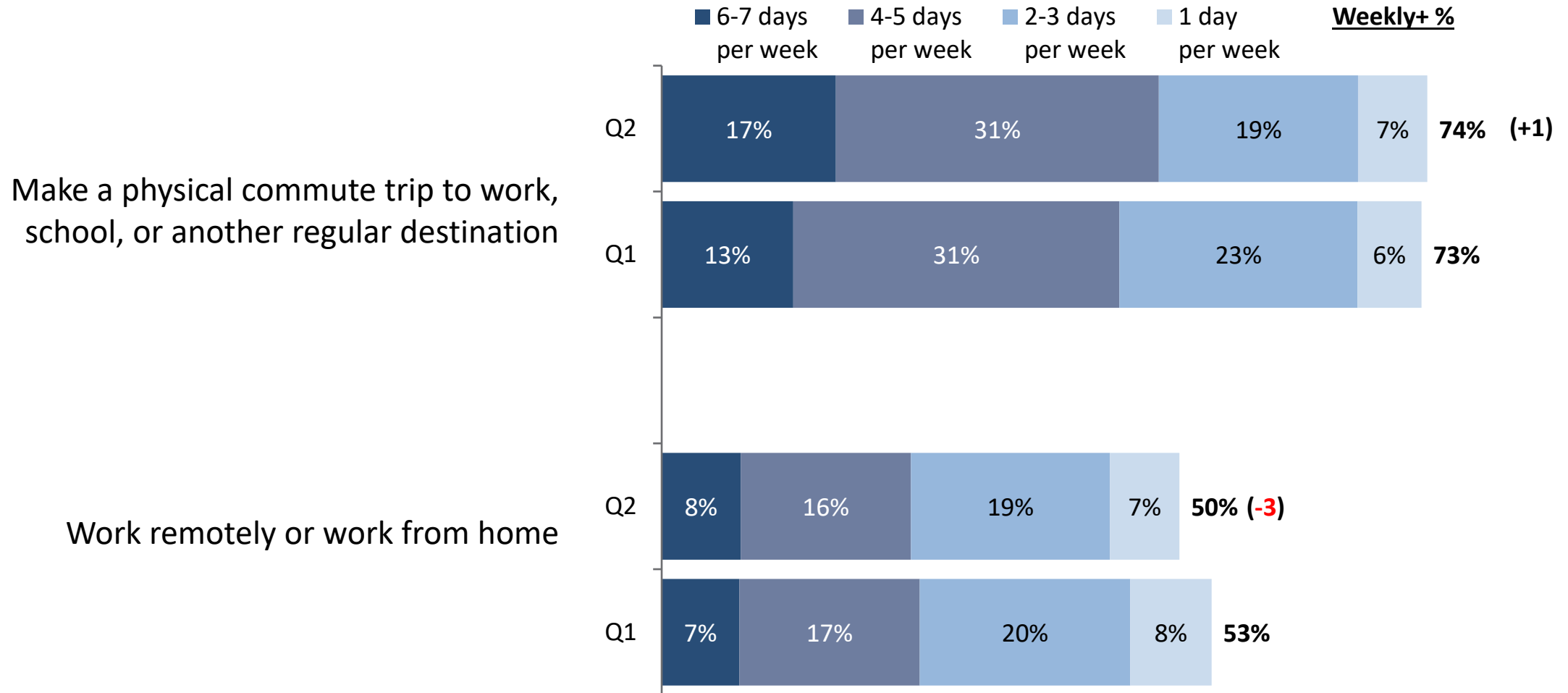


**Overall Travel Behavior**



# Commute Frequency

Commute and remote work frequency in Q2 remain consistent with Q1 2023.



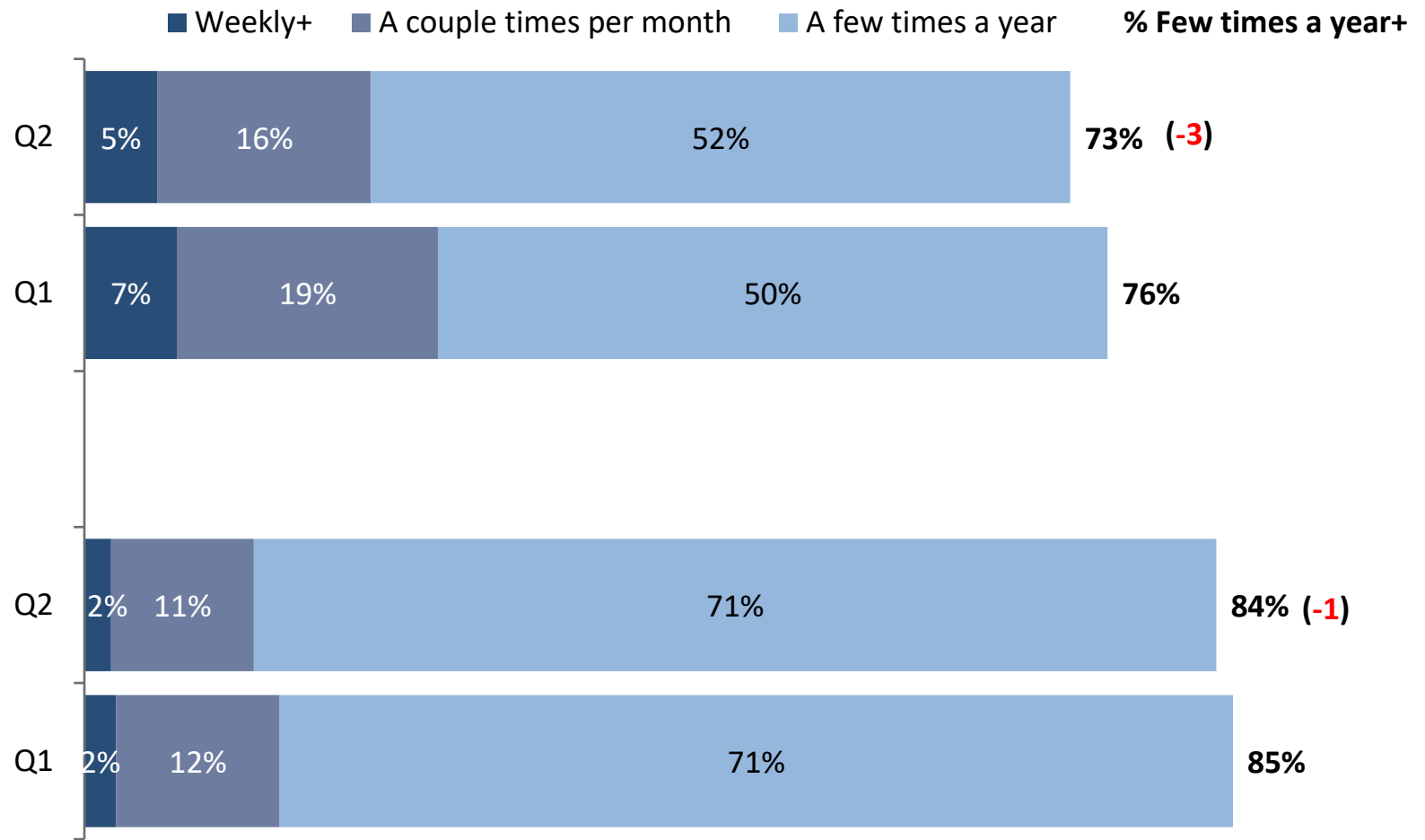
Q12-Q15. These next questions are about your local travel around the Bay Area. Please indicate how often you do each of the following, on average.

# Other Travel Frequency

Similarly, the share of residents reporting traveling to a special event and the airport are mostly consistent with quarter one, however, there has been a slight decline in the percentage of respondents indicating they travel to a special event.

Travel to a special event, such as a sporting event or concert

“I usually go maybe twice a month... Just go into the city or a Giants game.”  
- Group 1, Frequent Riders



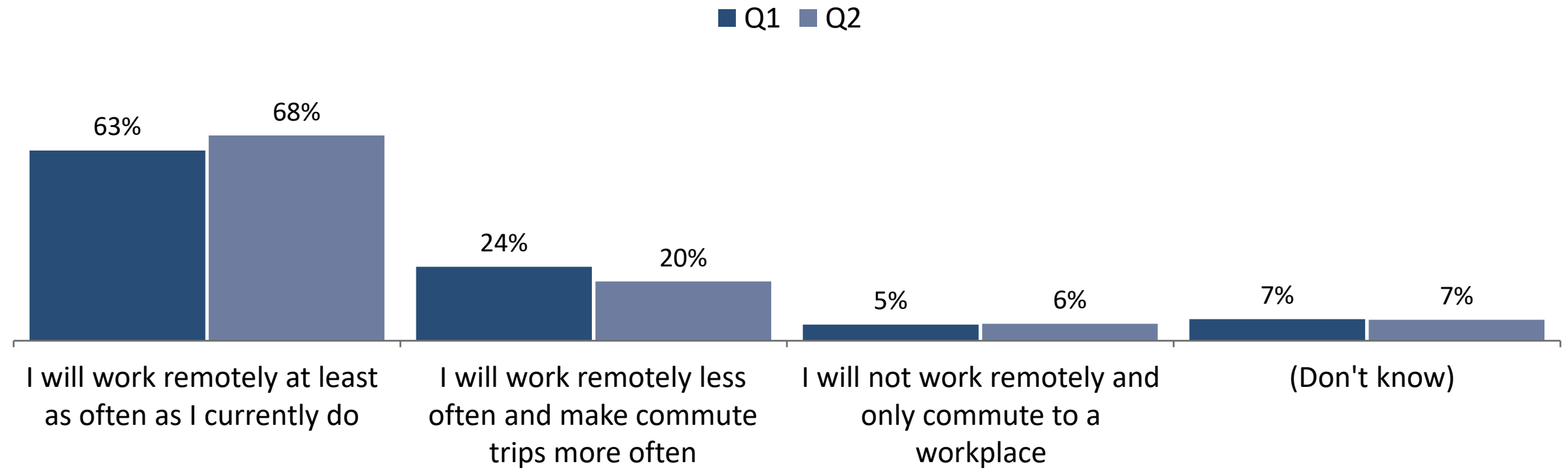
Q12-Q15. These next questions are about your local travel around the Bay Area. Please indicate how often you do each of the following, on average.

# Future Remote Work Frequency

*Of those who work remotely a couple of times per month or more, nearly seven-in-ten reported that they plan to continue working remotely at least as frequently as they currently do, while almost a fifth of them plan to work remotely less often and make more commute trips to the workplace in the next three months.*

*Asked among those who work remotely a couple of times per month or more (Q1 n=875, Q2 n=985)*

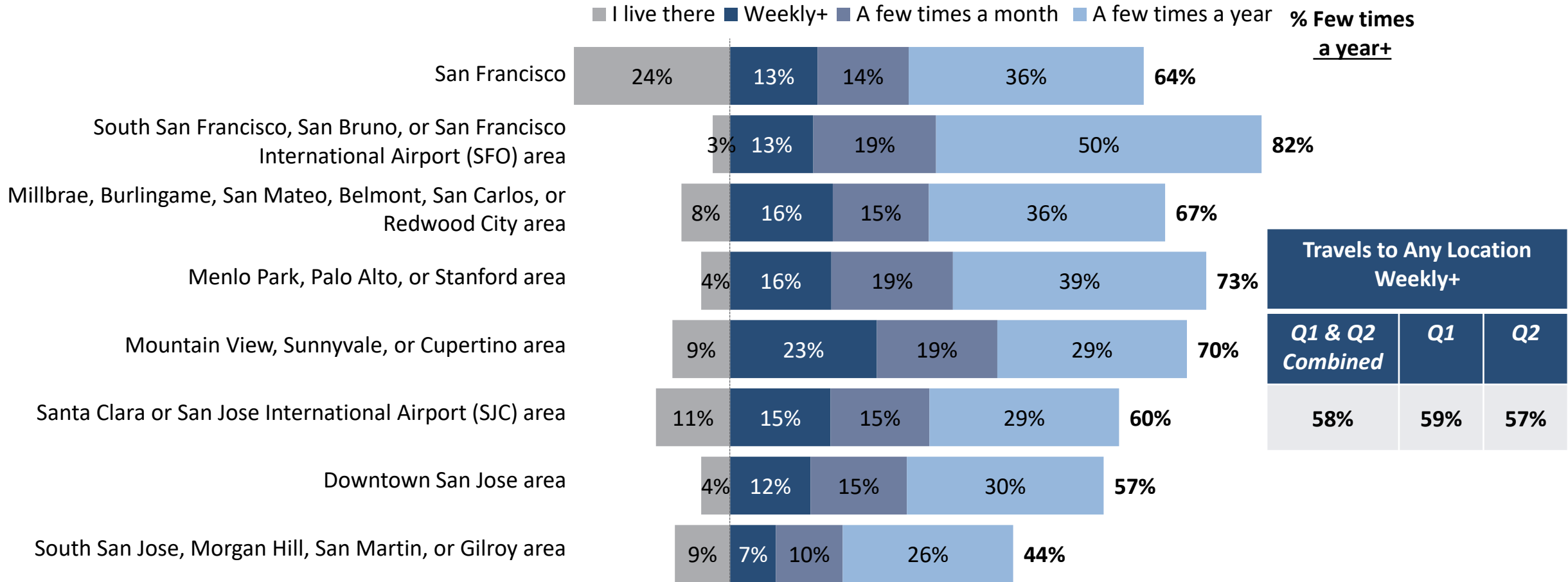
**“In the next 3 months, which of the following do you expect will best describe your remote work situation?”**



# Destination Frequency

*Eight-in-ten respondents stated that they visit the SFO area at least a few times a year. Over half of respondents indicate traveling to at least one of the following locations weekly.*

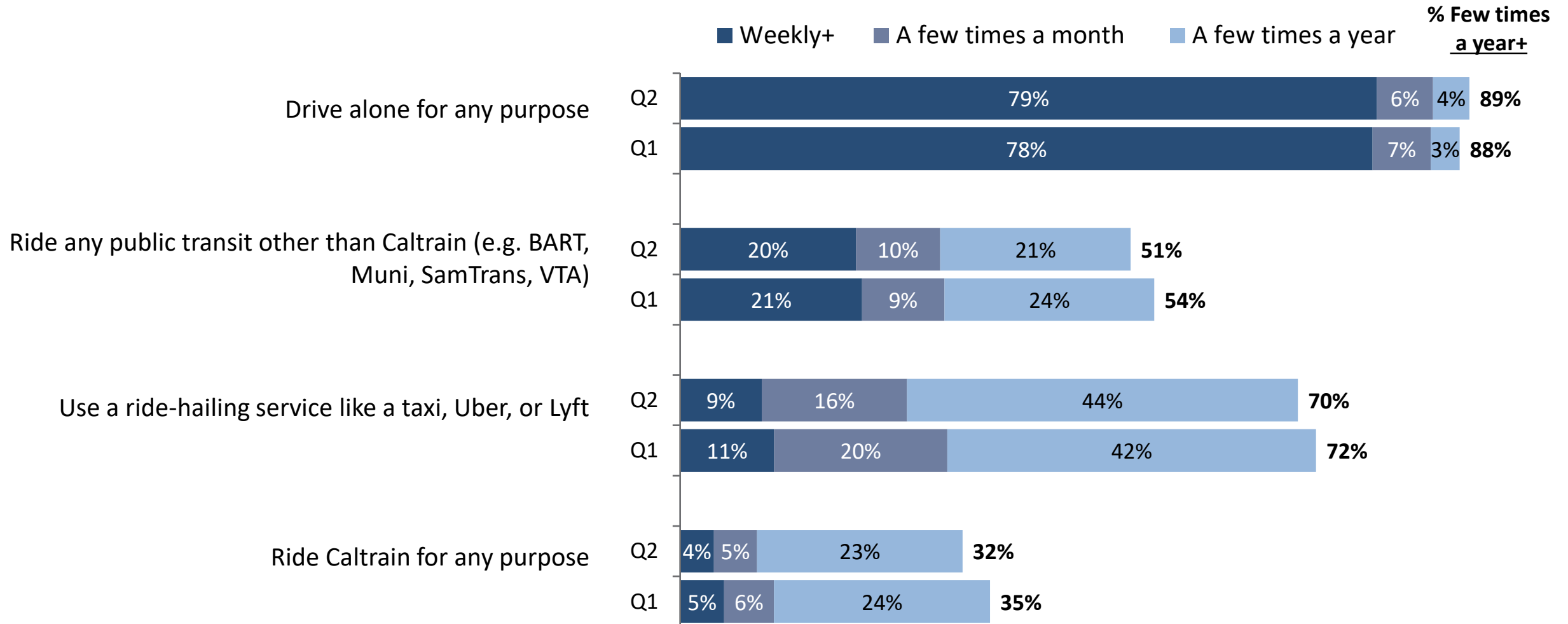
**Showing Combined Q1 and Q2 Data; n=3,348**



Q4-11. How often do you travel to each of the following locations around the San Francisco Peninsula, on average? If you live in that area, please just say so.

# Typical Travel Modes

*Driving alone remains the most commonly-reported travel mode for any purpose, followed by the use of ride-hailing services. The preference for these modes of transportation remains consistent with the data from the previous quarter.*



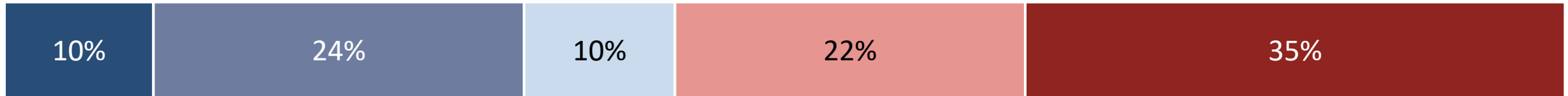
# Caltrain Ridership – Q1 & Q2 Combined

*In the second quarter, slightly less than a third of the respondents mentioned riding Caltrain at least a few times a year. However, only one in ten of them reported riding it a couple of times a month or more frequently.*

Showing Combined Q1 and Q2 Data; n=3,348

## % of All Residents

■ Regular Riders   ■ Occasional Riders   ■ Lapsed Riders   ■ Rare Riders   ■ Non-Riders



### **Regular Riders**

*Currently rides Caltrain a couple times a month or more, for any reason*  
(n=273)

### **Occasional Riders**

*Currently rides Caltrain a few times a year, for any reason*  
(n=822)

### **Lapsed Riders**

*Rode Caltrain on a regular basis at any point in the past, and currently rides Caltrain less than once a year or never, for any reason*  
(n=337)

### **Rare Riders**

*Never rode Caltrain on a regular basis at any point in the past, and currently rides Caltrain less than once a year, for any reason*  
(n=770)

### **Non-Riders**

*Never rode Caltrain on a regular basis at any point in the past, and currently never rides Caltrain, for any reason*  
(n=1,146)

Q4-6. I'm going to read you a few statements about your transportation habits before the pandemic. Please tell me if you did each one more than once a week or less than once a week.  
Q7-9. Next, I'm going to read you a few statements about your transportation habits currently. Please tell me if you do each one more than once a week or less than once a week.

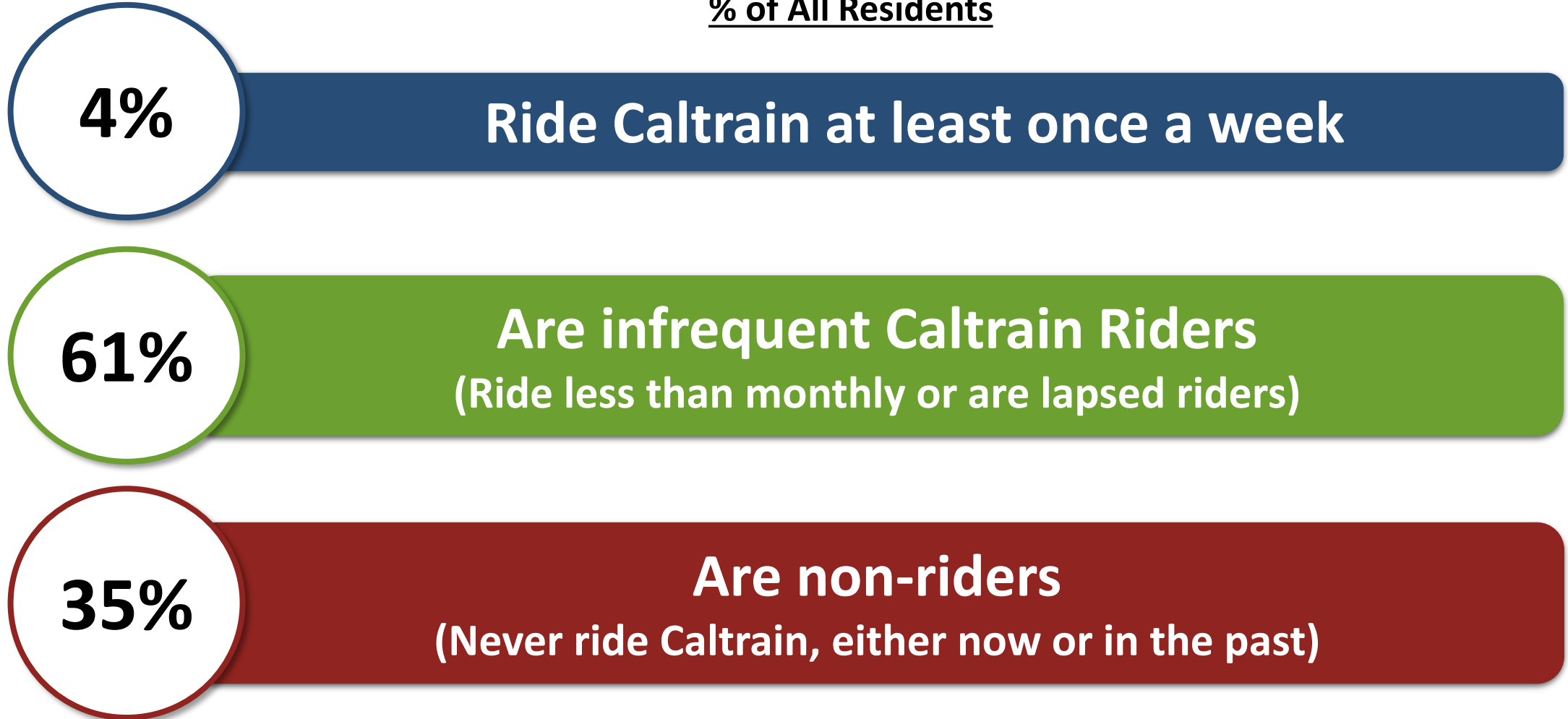


# Potential Ridership Segmentation

# Potential Rider Segmentation – Key Questions

Showing Combined Q1 and Q2 Data; n=3,348

% of All Residents





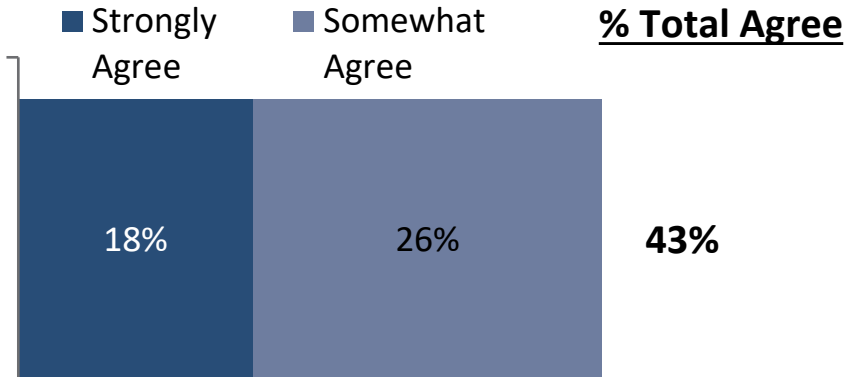
# Potential Rider Segmentation – Key Questions

% of All Residents

Showing Combined Q1 and Q2 Data; n=3,348

## Interest in Riding Caltrain

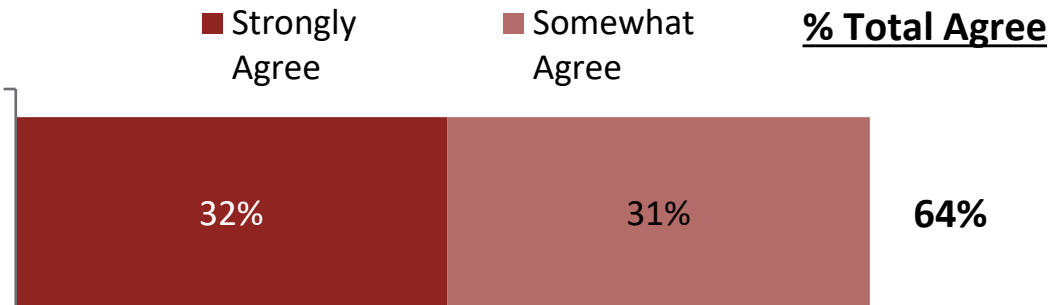
I would prefer to ride Caltrain more often than I do now



**High Interest:** “Strongly” agree (18%)  
**Medium Interest:** “Somewhat” agree (26%)  
**Low Interest:** Do not agree (57%)

## Barriers to Riding Caltrain

It is too difficult to get to the places I'd need to go from Caltrain



**High Barrier:** “Strongly” agree with either statement (42%)  
**Medium Barrier:** Somewhat agree with both statements (11%)  
**Low Barrier:** Do not agree with either statement (46%)

It is too difficult to get to Caltrain from my home

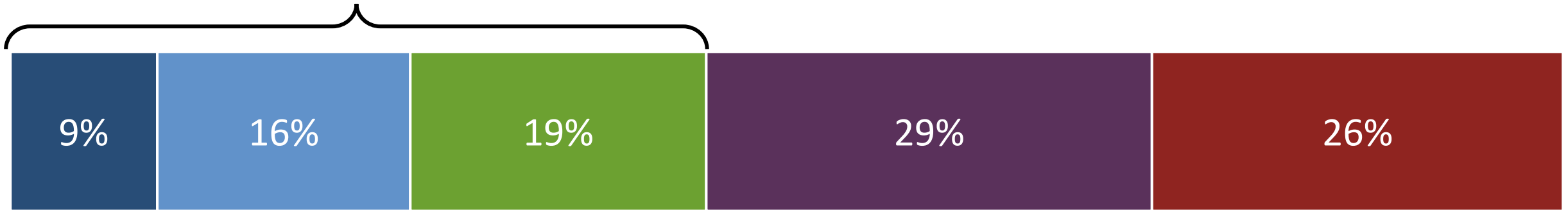


# Potential Rider Segmentation Definition

Showing Combined Q1 and Q2 Data; n=3,348

% of All Residents

Total Reachable Target: 45%



## Maximize Engagement

Weekly+ Caltrain riders or riders with strong interest in riding more often, and have low or no barriers to riding (n=293)

## Strengthen Engagement

Less than weekly Caltrain riders with either medium interest or medium barriers OR non-riders with low or no barriers & high interest in riding Caltrain (n=545)

## Longer-Term Convertible

Infrequent or lapsed riders or non-riders with some interest in riding Caltrain more often, but believe it is too difficult to get to Caltrain or where they would need to go via Caltrain (n=633)

## Monitor

Infrequent or lapsed riders who are not immediately interested in riding Caltrain more often (n=979)

## Out of Target

Non-riders who are not interested in riding Caltrain (n=898)

Q4-11. I'm going to read you a few statements about your transportation habits before the pandemic. Please tell me if you did each one more than once a week or less than once a week.

Q19. / Q50. / Q53. / Q54

# Segmentation Summary

## Maximize Engagement (9%):

*Riders who are on board – attitudinally and behaviorally – and hopefully, amenity or scheduling-based improvements of Caltrain can increase Caltrain ridership and satisfaction with service.*

## Strengthen Engagement (16%):

*Infrequent and non-riders who can viably ride more often. They are interested in riding more and have low barriers to riding. These riders may or may not need Caltrain for their commute, but faster service will be a compelling proposition, as well as off-peak and weekend service frequency.*

## Longer-Term Convertible (19%):

*Caltrain doesn't currently work for these riders, and most short- and medium-term improvements are unlikely to change that. Still, Caltrain may well be a top-of-mind option if circumstances change. In the meantime, these riders are more open to riding for more occasional/special event trips as they come up.*

## Monitor (29%):

*This group sometimes rides Caltrain, and most like the service, but short of a complete system overhaul, they're probably not going to ride any more than they already do.*

## Out of Target (26%):

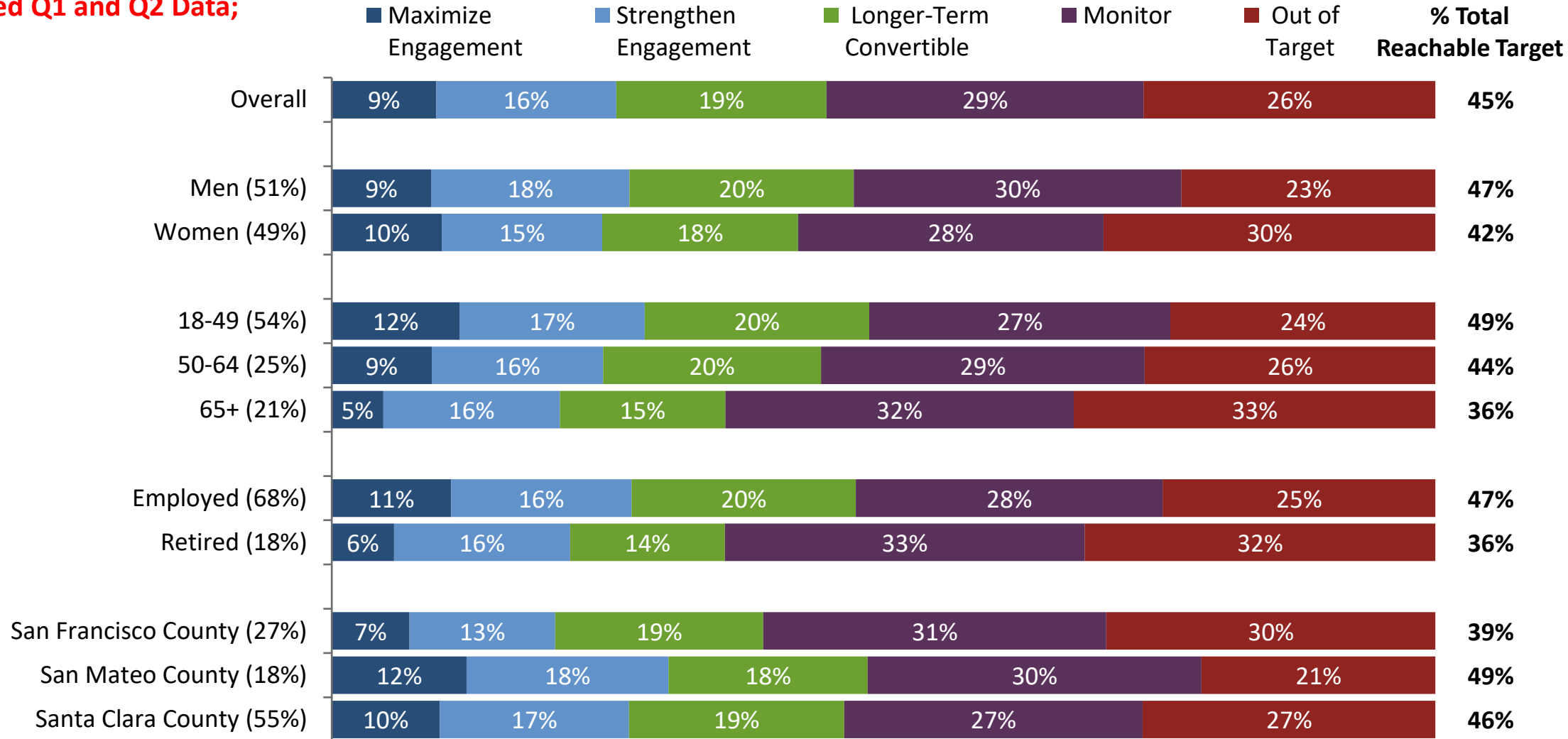
*Caltrain isn't relevant to these people and most likely never will be.*

# Segmentation by Demographic Subgroups



Potential rider engagement targets are more heavily concentrated among younger residents and those living outside San Francisco.

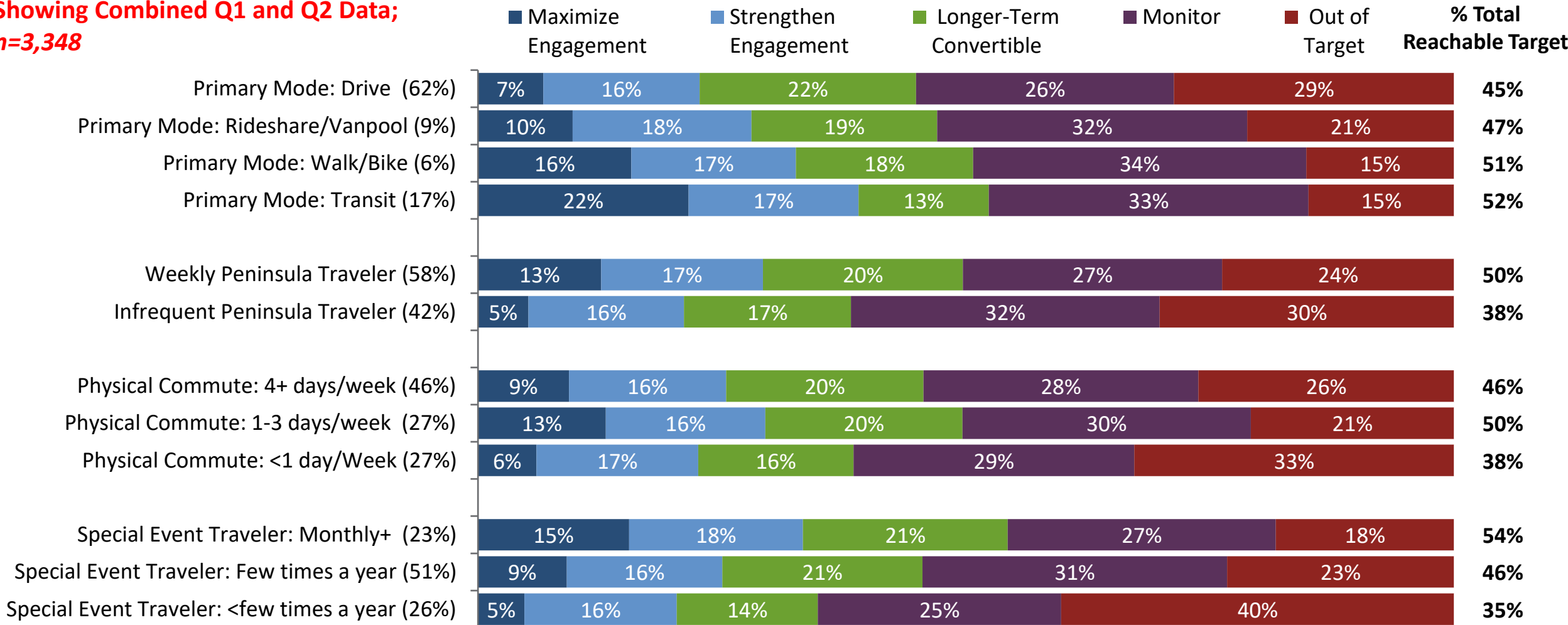
Showing Combined Q1 and Q2 Data;  
n=3,348



# Segmentation by Subgroups

*Residents who travel at least weekly to destinations around the Peninsula, those who commute 1-3 days per week, existing users of transit and non-motorized modes, and those who frequently travel to special events are relatively more likely to be reachable targets.*

**Showing Combined Q1 and Q2 Data;  
n=3,348**

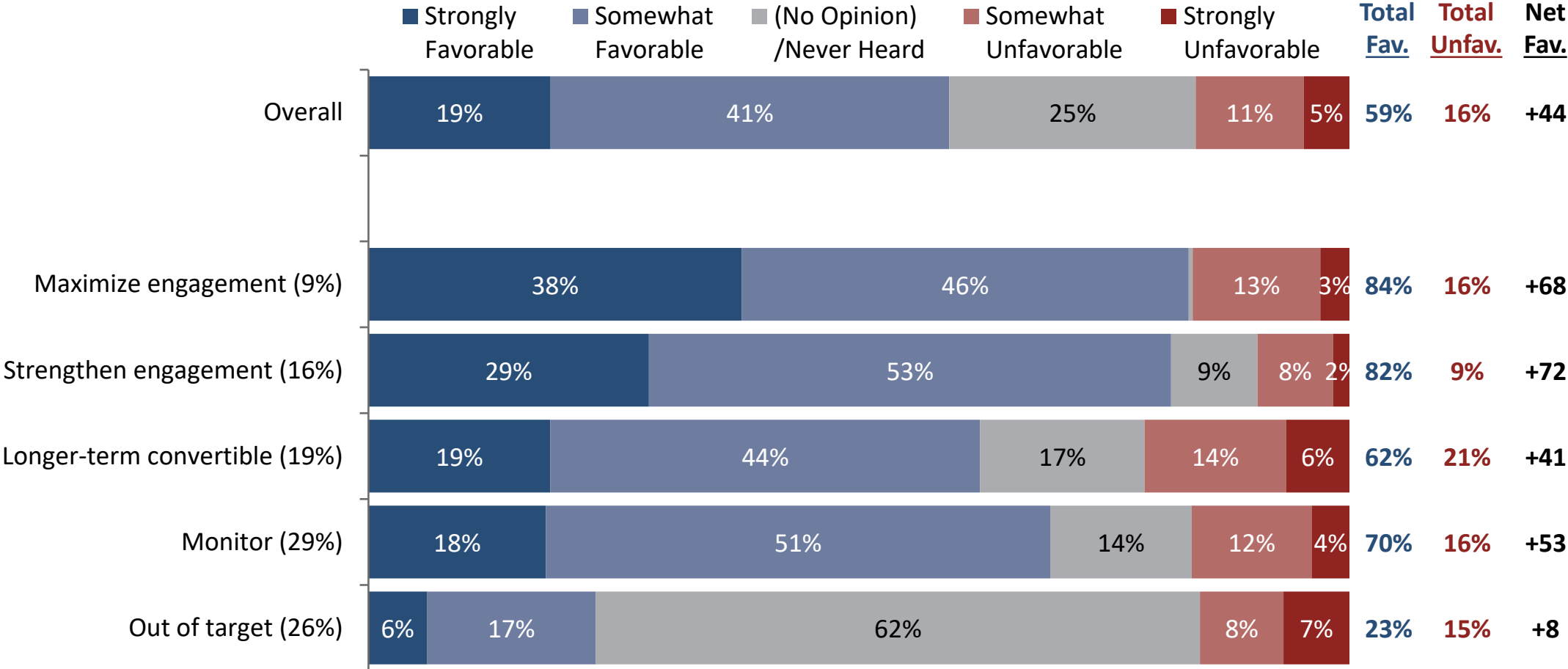


# Caltrain Favorability by Potential Rider Segmentation



*Riders in the top engagement categories have the strongest opinions of Caltrain, both overall and in intensity. Most in the longer-term convertible segment also rate Caltrain favorably, but with low intensity and slightly inflated critical ratings.*

**Showing Combined Q1 and Q2 Data;  
n=3,348**



# Caltrain Barriers by Potential Rider Segmentation

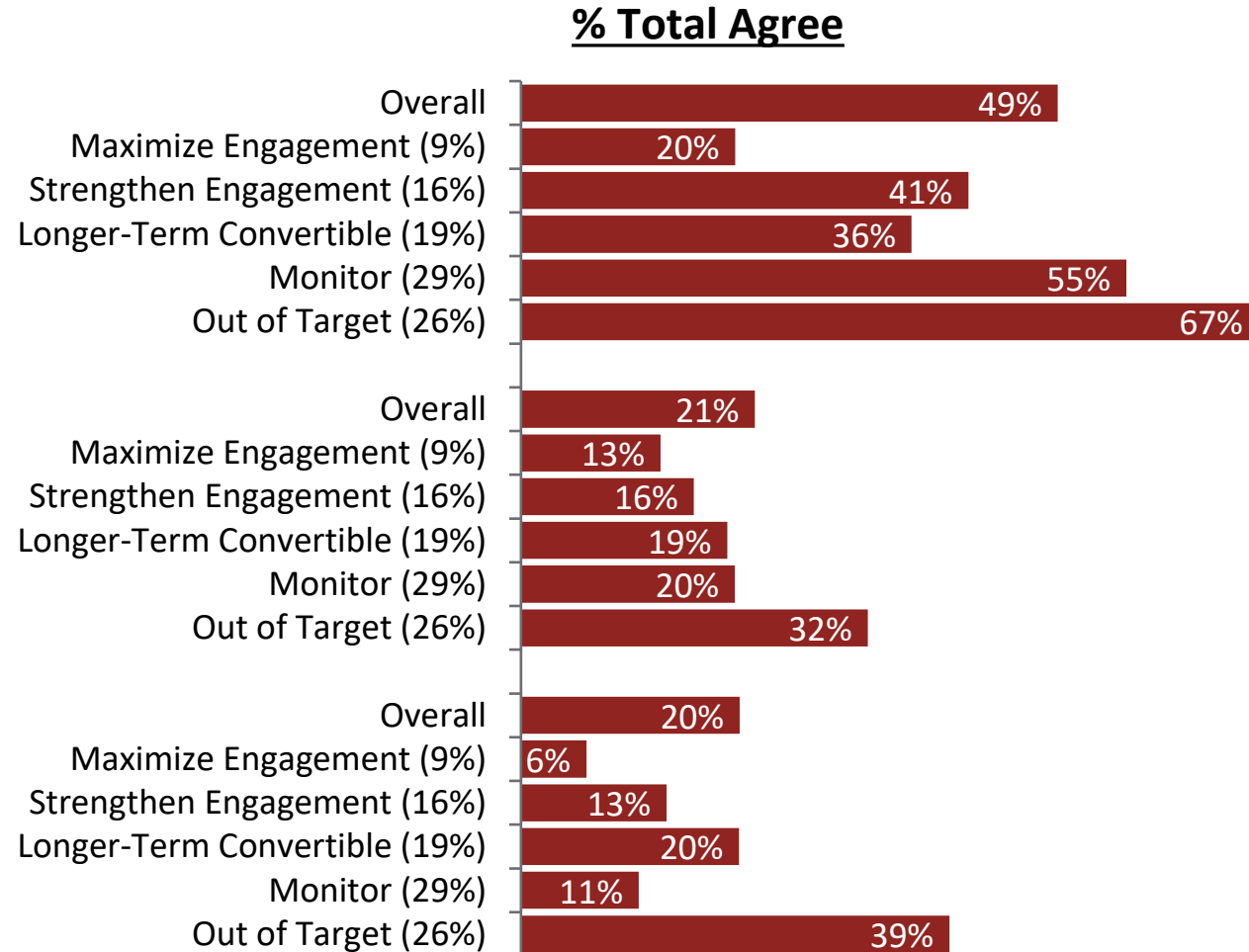
Significant shares of each potential rider target will continue using cars for most of their travel, even as they are open to riding Caltrain more often. Relatively few consider personal safety or uncertainty as tangible barriers to ridership.

Showing Combined Q1 and Q2 Data;  
n=3,348

**Nothing will replace my car as my main mode of transportation**

**I am worried about my personal safety when I ride Caltrain**

**I am not sure how to ride Caltrain**



# Maximize Engagement (9%) Key Findings

## ▶ Maximize Engagement:

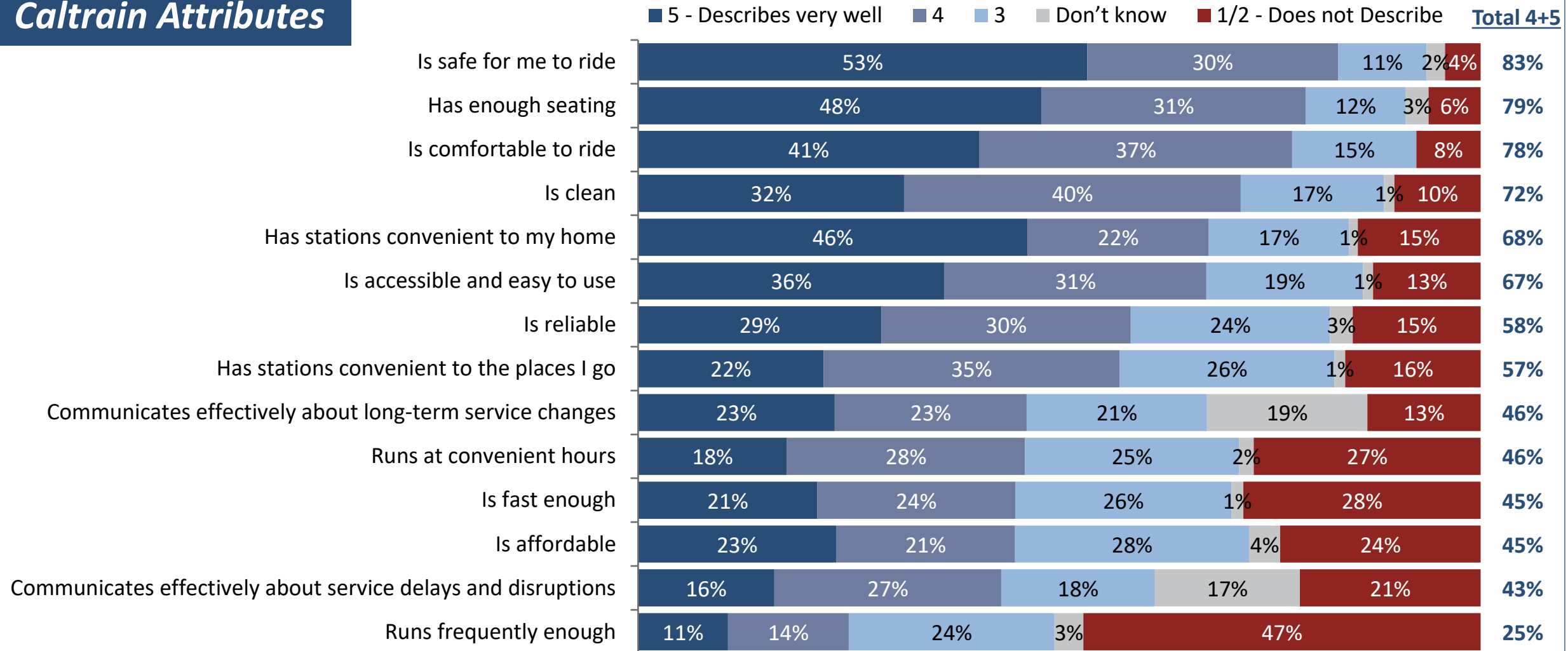
- ▶ This segmentation target consists of residents who already use Caltrain and exhibit strong interest in riding even more often.
- ▶ This group has strongly positive perceptions of the Agency and most of its service attributes.
- ▶ However, they are most critical of Caltrain's service frequency as a prominent sticking point. This is followed, to a lesser extent, by reduced ratings for operating hours, travel time, affordability, and service disruption-related communications.
- ▶ Top of mind, nearly one-third cited schedule-related issues as their top barrier to riding Caltrain. Similarly, more frequent service is their primary suggestion for getting them to ride more often.
- ▶ When asked about improvements Caltrain is making that could increase ridership, they suggest faster trains, more frequent service during off-peak hours and weekends, and reduced fares.



# Maximize Engagement (9%) Snapshot

Showing Combined Q1 and Q2 Data; n=293

## Caltrain Attributes



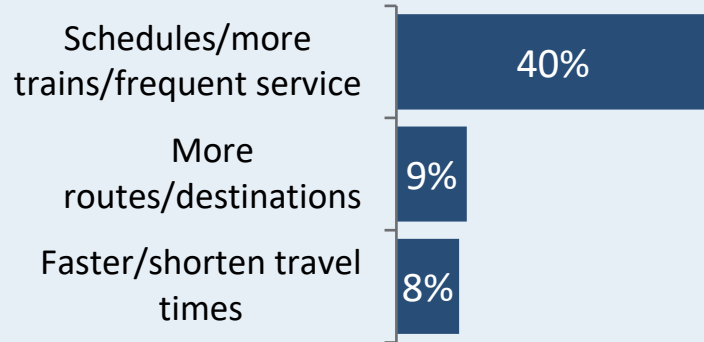
Q34-47. Based on what you may have experienced or heard regarding Caltrain, for each of the following phrases, please indicate how well you think that phrase describes Caltrain.

# Maximize Engagement (9%) Snapshot

Showing Combined Q1 and Q2 Data; n=293

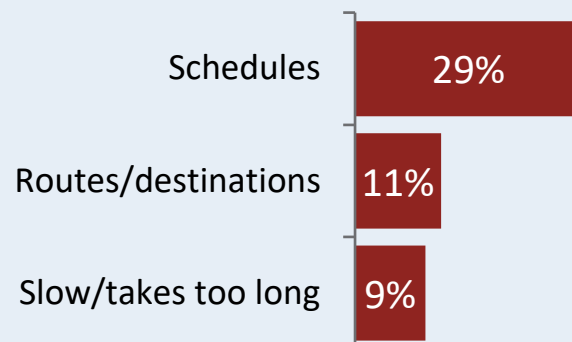
## Top-of-mind Incentives

Open-ended verbatims coded into categories shown below



## Top-of-mind Barriers

Open-ended verbatims coded into categories shown below



## Top 3 Attributes

**Caltrain...**

**1.) Is safe for me to ride**

83% Describes, 53% Very well

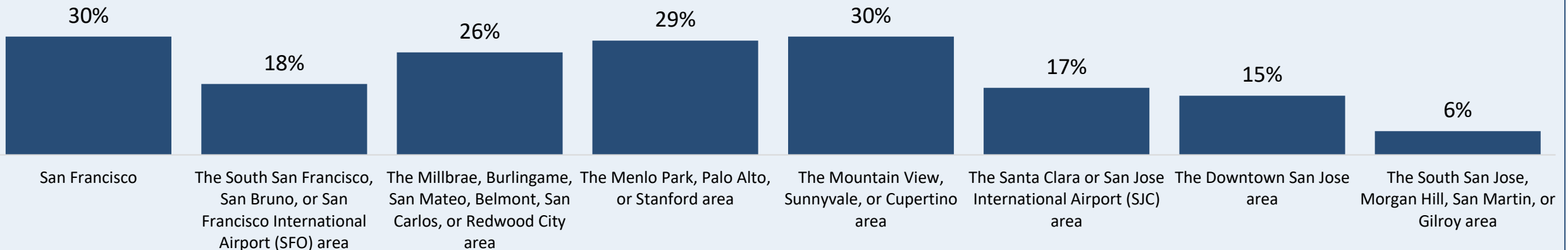
**2.) Has enough seating**

79% Describes, 48% Very well

**3.) Is comfortable to ride**

78% Describes, 41% Very well

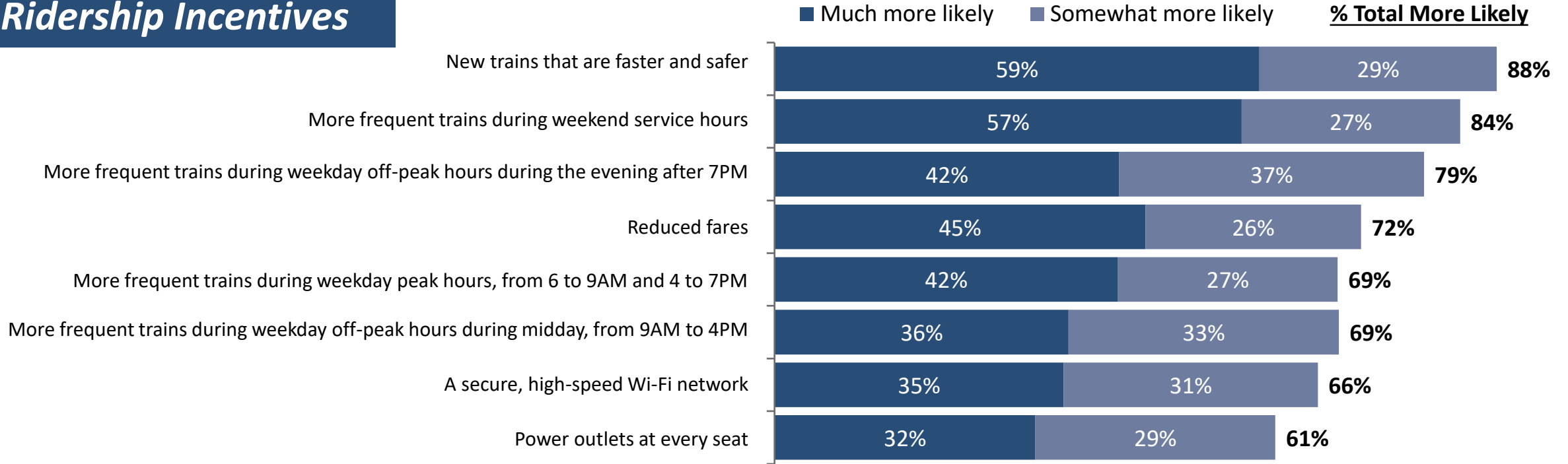
## Destination Frequency; Weekly+



# Maximize Engagement (9%) Snapshot

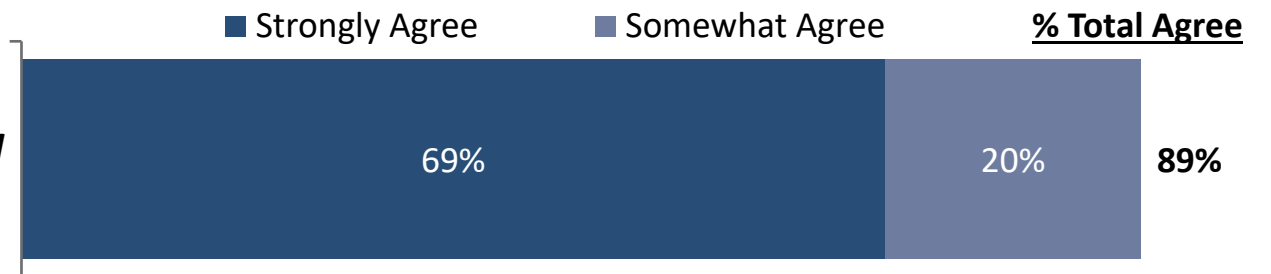
Showing Combined Q1 and Q2 Data; n=293

## Ridership Incentives



## Would Prefer to Take Caltrain

*“If I can take Caltrain to get to my destination, I would rather do that than drive”*



# Strengthen Engagement (16%) Key Findings

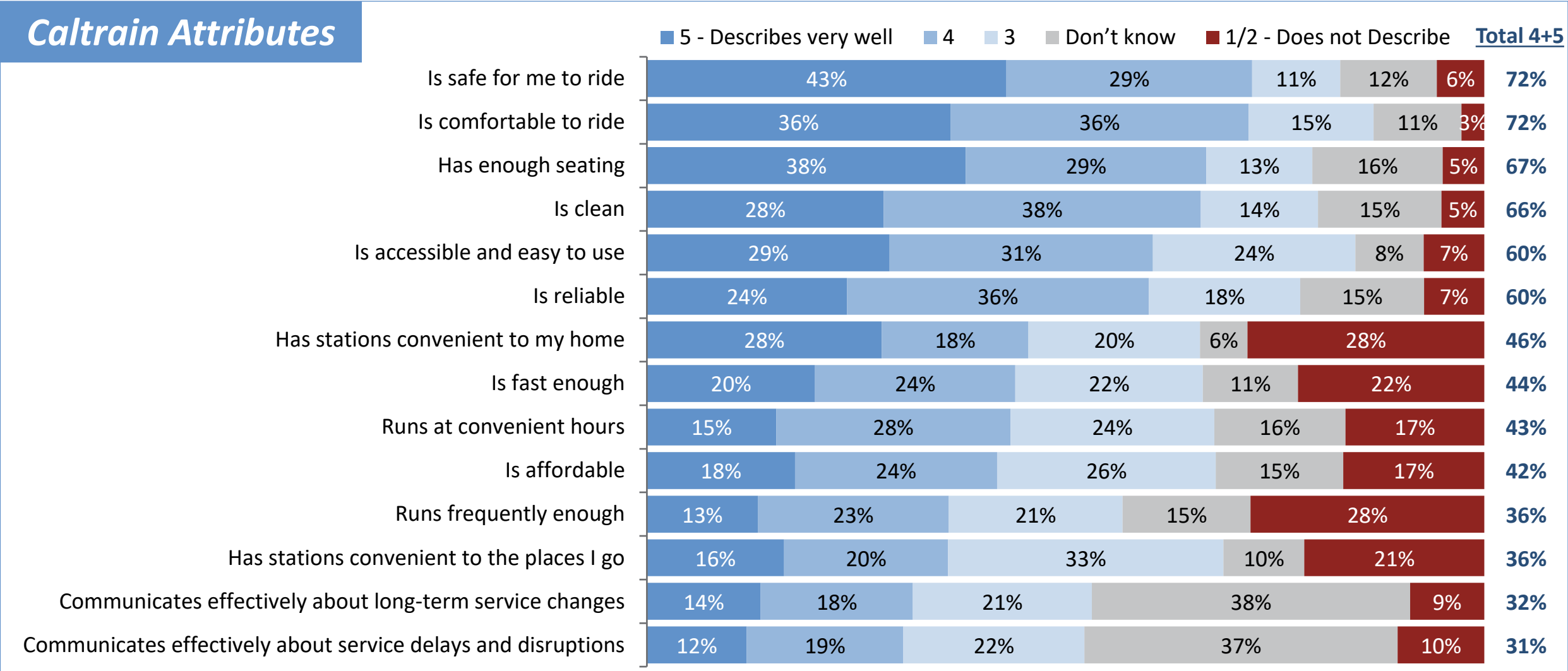
## ▶ Strengthen Engagement:

- This segmentation target includes those who may ride Caltrain infrequently – or not at all – but do express at least moderate interest in riding more often and believe Caltrain serves the places they would need to go.
- They generally view Caltrain’s service positively across the board. They largely view it as a safe, comfortable, clean, and reliable experience, but some are relatively more critical of the convenience of station locations and service frequency.
- The most mentioned top-of-mind barriers to riding Caltrain include service frequency and a need for stations.
- Among those in this target group, new trains with faster service is a compelling proposition, along with increased weekend service frequency and reduced fares.
- Although three-quarters would prefer to ride Caltrain over driving, four-in-ten believe nothing will replace their car as their main mode of transportation. For those respondents, any additional Caltrain usage will be largely supplemental.

# Strengthen Engagement (16%) Snapshot

Showing Combined Q1 and Q2 Data; n=545

## Caltrain Attributes



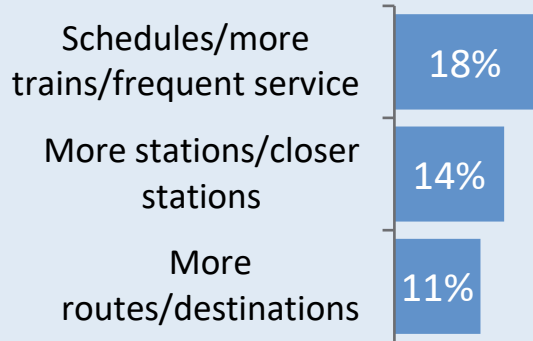
Q34-47. Based on what you may have experienced or heard regarding Caltrain, for each of the following phrases, please indicate how well you think that phrase describes Caltrain.

# Strengthen Engagement (16%) Snapshot

Showing Combined Q1 and Q2 Data; n=545

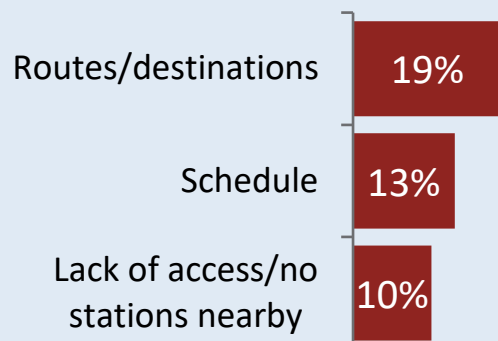
## Top-of-mind Incentives

Open-ended verbatims coded into categories shown below



## Top-of-mind Barriers

Open-ended verbatims coded into categories shown below



## Top 3 Attributes

**Caltrain...**

**1.) Is safe for me to ride**

72% Describes, 43% Very well

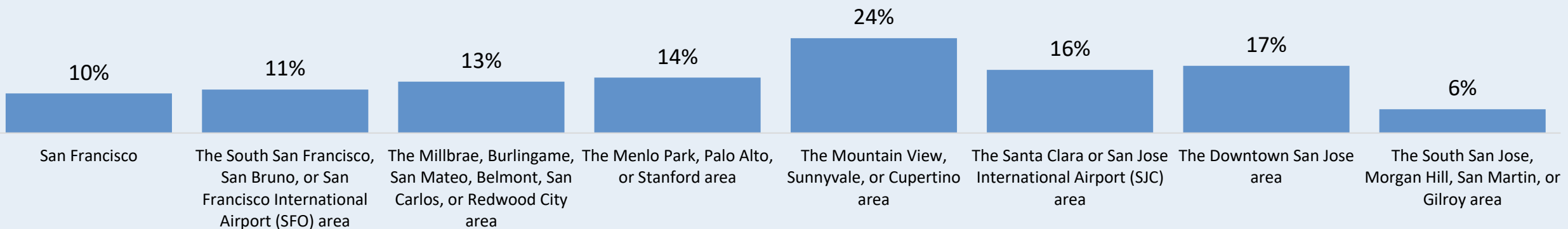
**2.) Is comfortable to ride**

72% Describes, 36% Very well

**3.) Has enough seating**

67% Describes, 38% Very well

## Destination Frequency; Weekly+

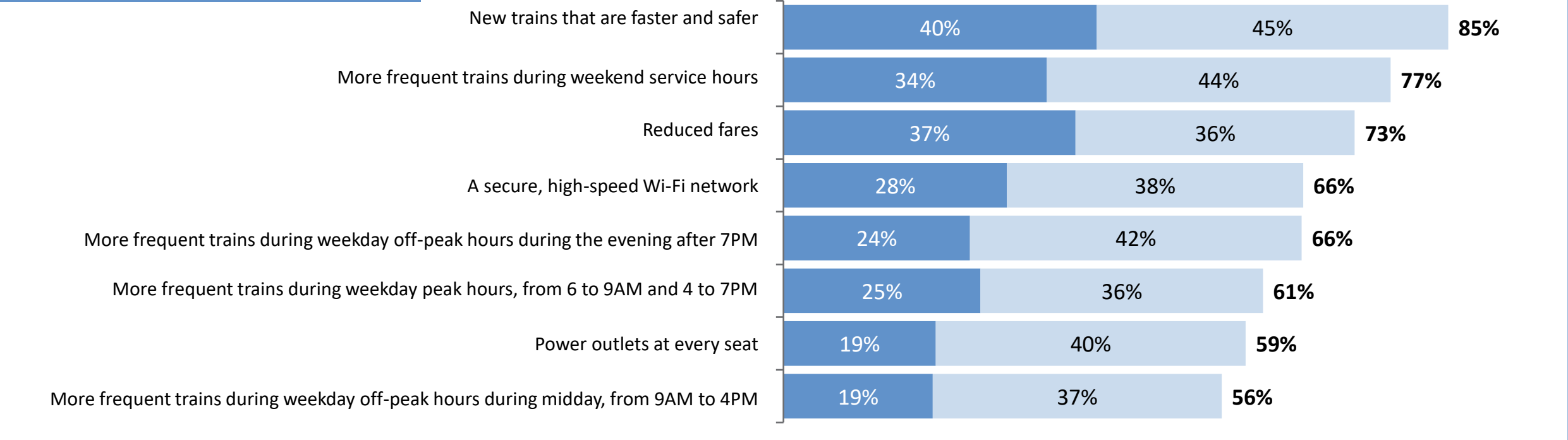


# Strengthen Engagement (16%) Snapshot



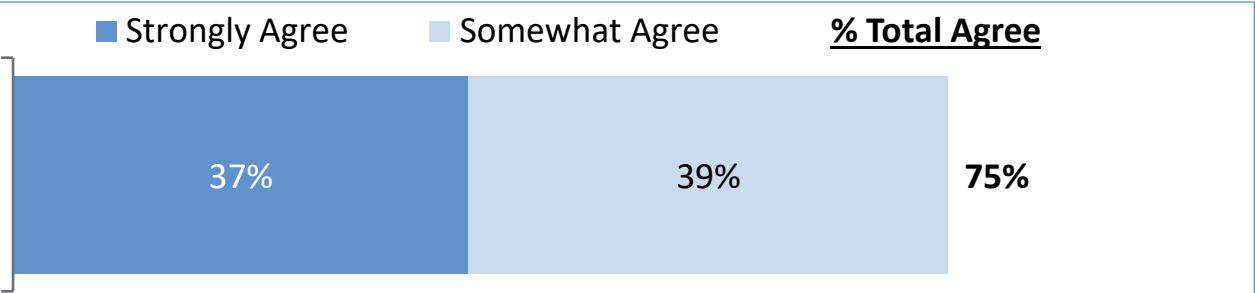
Showing Combined Q1 and Q2 Data; n=545

## Ridership Incentives



## Would Prefer to Take Caltrain

***“If I can take Caltrain to get to my destination, I would rather do that than drive”***



## ▶ Longer-term Convertible:

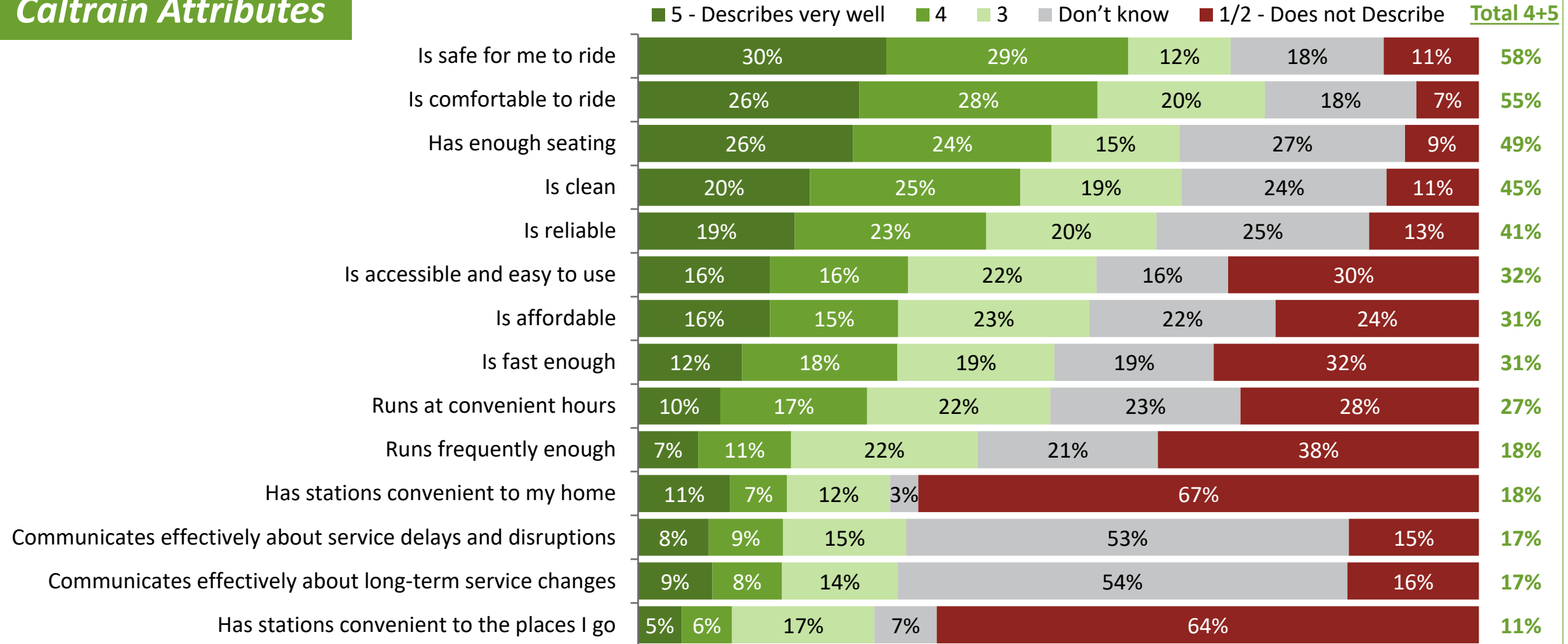
- By definition, residents in this longer-term target use Caltrain infrequently and are at least moderately interested in riding more often but they currently believe the service does not serve where they live or to the places they would want to go.
- Although over eight-in-ten of longer-term convertibles would prefer to take Caltrain if they could, limited routes/destinations and a lack of access are tangible barriers for them.
- For most, riding Caltrain currently isn't viable. They don't currently go where the service does, but they may keep Caltrain top-of-mind if their situation changes in the future.
- For some, increased service frequency and new, faster trains may help move the needle in getting them to ride more often eventually, particularly if travel time and flexibility grow closer to parity with driving alone.



# Longer-term Convertible (19%) Snapshot

Showing Combined Q1 and Q2 Data; n=633

## Caltrain Attributes



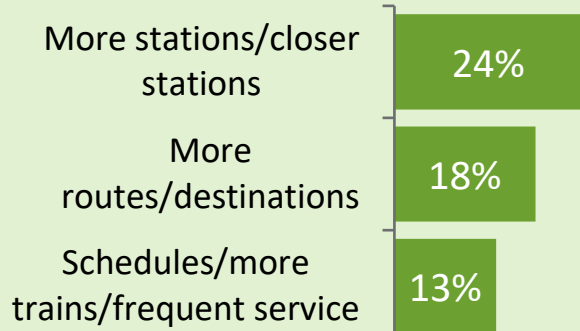
Q34-47. Based on what you may have experienced or heard regarding Caltrain, for each of the following phrases, please indicate how well you think that phrase describes Caltrain.

# Longer-term Convertible (19%) Snapshot

Showing Combined Q1 and Q2 Data; n=633

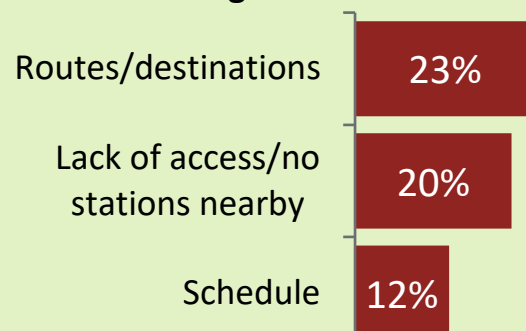
## Top-of-mind Incentives

Open-ended verbatims coded into categories shown below



## Top-of-mind Barriers

Open-ended verbatims coded into categories shown below



## Top 3 Attributes

**Caltrain...**

**1.) Is safe for me to ride**

58% Describes, 30% Very well

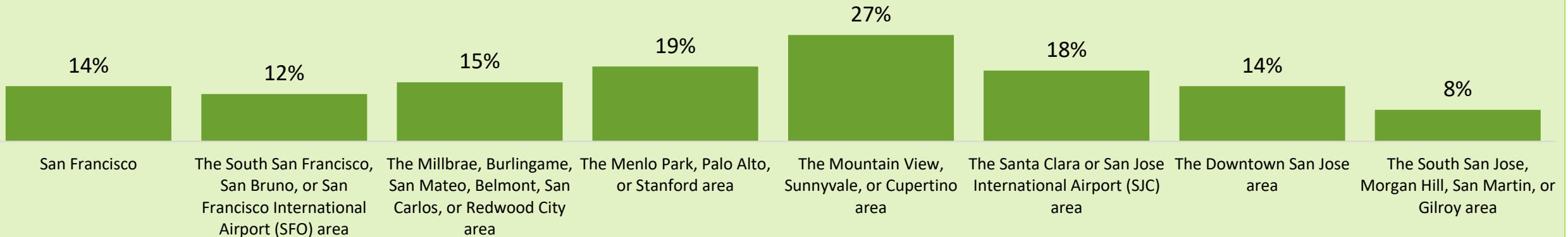
**2.) Is comfortable to ride**

55% Describes, 26% Very well

**3.) Has enough seating**

49% Describes, 26% Very well

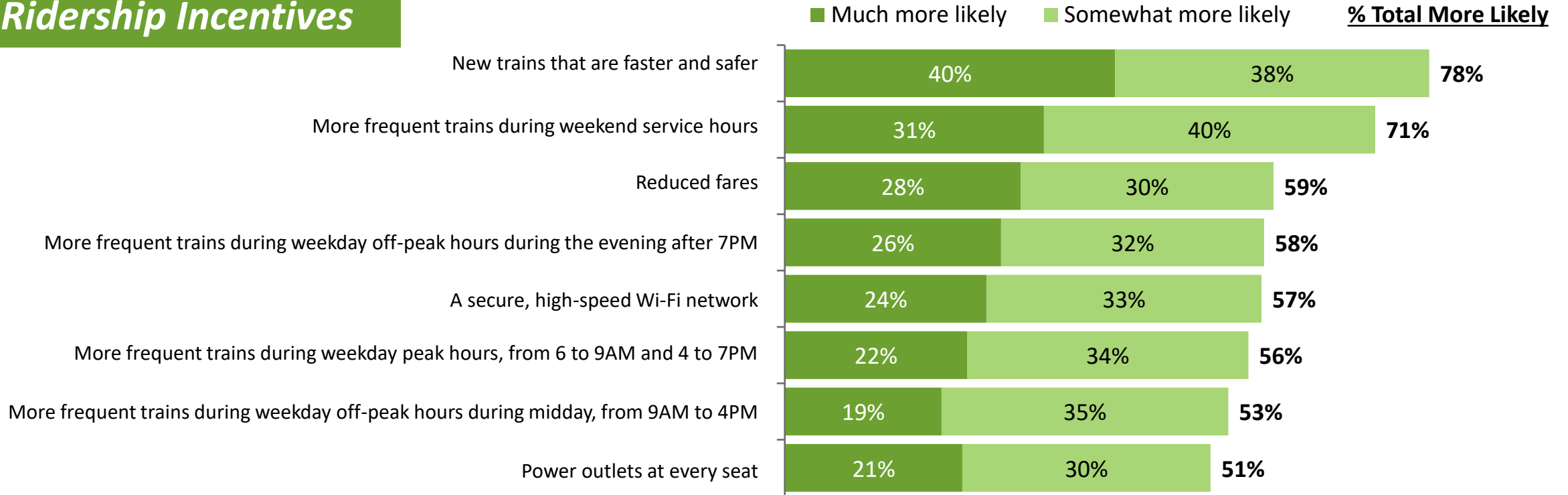
## Destination Frequency; Weekly+



# Longer-term Convertible (19%) Snapshot

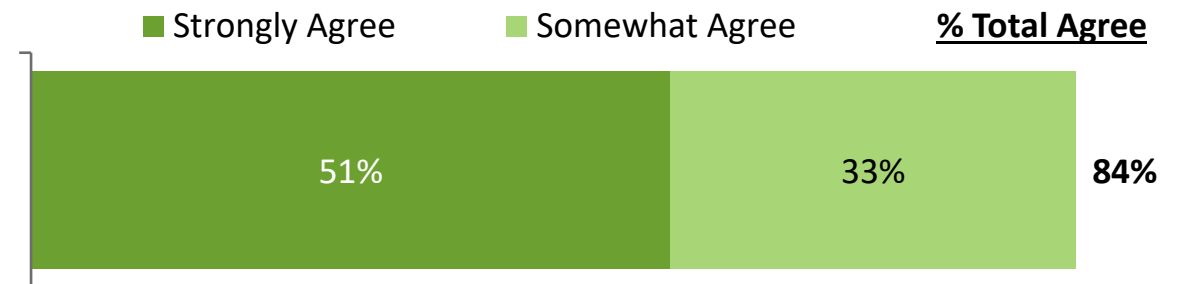
Showing Combined Q1 and Q2 Data; n=633

## Ridership Incentives



## Would Prefer to Take Caltrain

***“If I can take Caltrain to get to my destination, I would rather do that than drive”***



# Monitor (29%) Key Findings

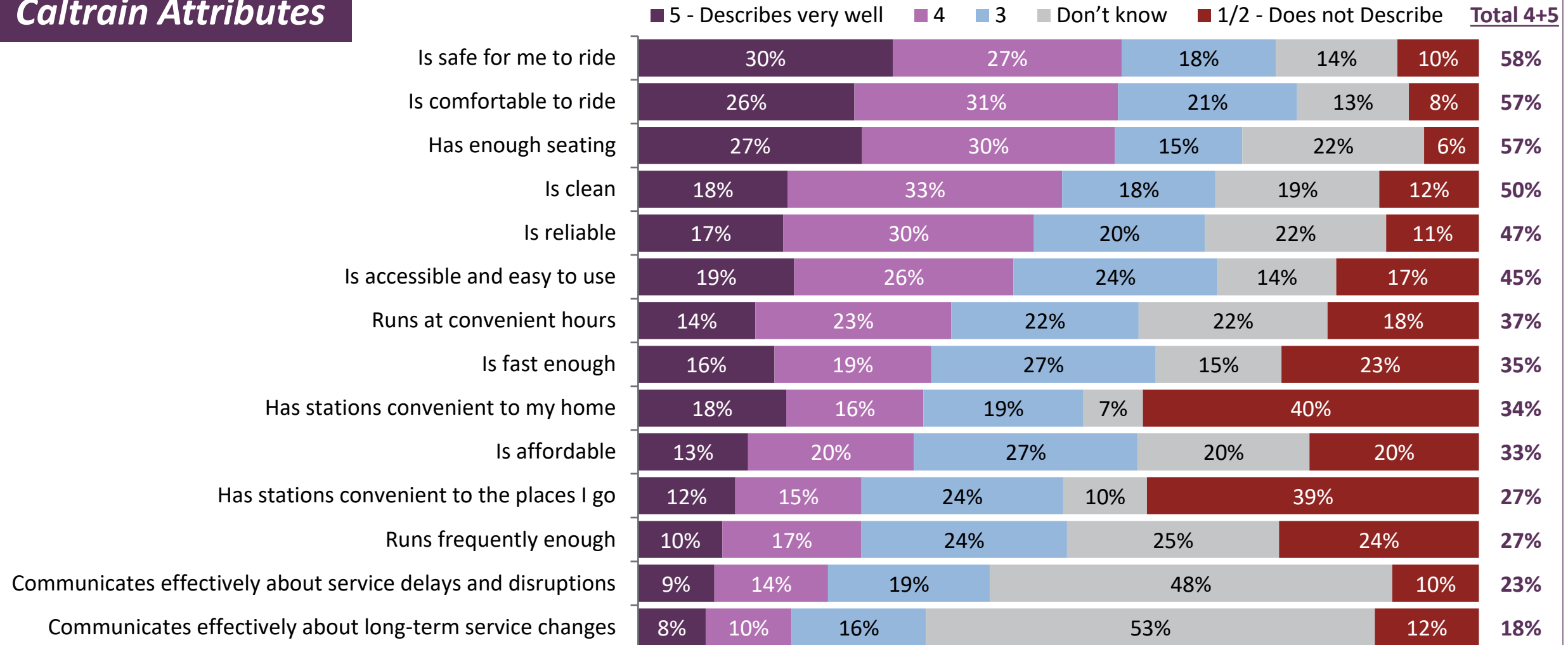
## ► Monitor:

- This segmentation group occasionally uses Caltrain but is uninterested in increasing their usage beyond what they currently do. Because they are at least somewhat familiar with Caltrain, this group is worth monitoring for long-term opportunities to maintain and strengthen their ridership where possible, but their growth potential is minimal for now.
- Although they consider Caltrain to be a secure and comfortable mode of transportation, many don't believe the service is currently viable or necessary. Top-of-mind factors that could motivate them to ride more frequently include deeply structural changes largely outside of Caltrain's control, including additional stations, changes in personal circumstances, and new routes.
- However, when asked about specific changes they would like to see, more than half of them would be encouraged to use Caltrain more if there were faster trains, increased frequency of weekend services, and reduced fares.

# Monitor (29%) Snapshot

Showing Combined Q1 and Q2 Data; n=979

## Caltrain Attributes



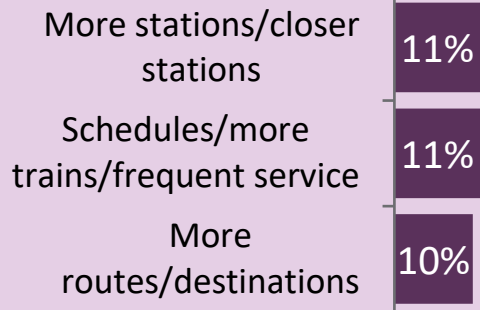
Q34-47. Based on what you may have experienced or heard regarding Caltrain, for each of the following phrases, please indicate how well you think that phrase describes Caltrain.

# Monitor (29%) Snapshot

Showing Combined Q1 and Q2 Data; n=979

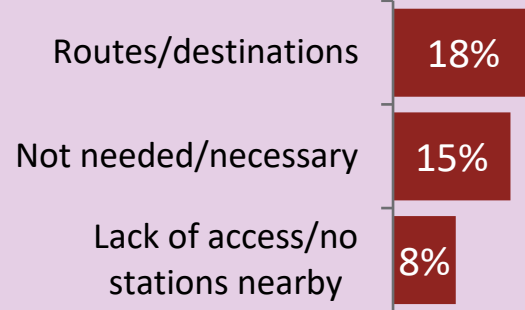
## Top-of-mind Incentives

Open-ended verbatims coded into categories shown below



## Top-of-mind Barriers

Open-ended verbatims coded into categories shown below



## Top 3 Attributes

**Caltrain...**

### 1.) Is safe for me to ride:

58% Describes, 30% Very well

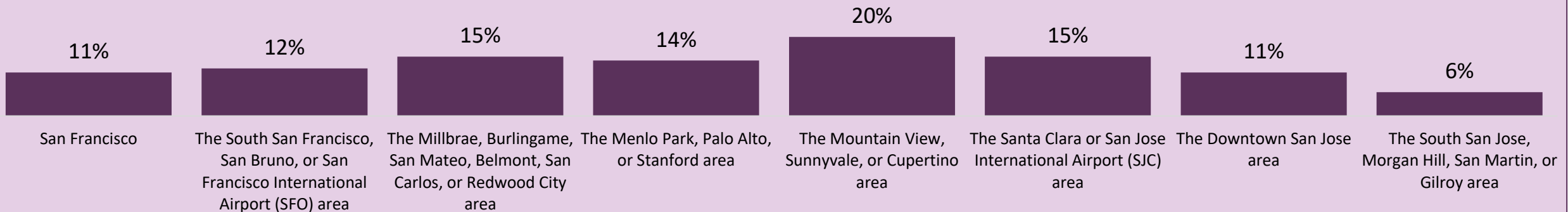
### 2.) Has enough seating:

57% Describes, 27% Very well

### 3.) Is comfortable to ride:

57% Describes, 26% Very well

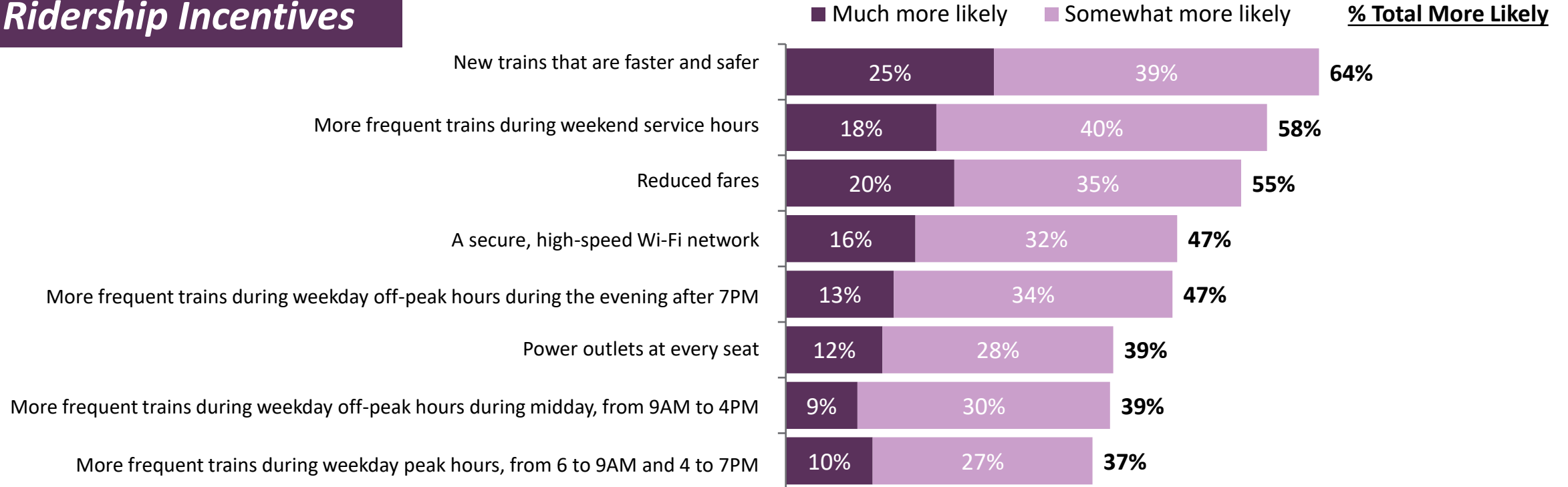
## Destination Frequency; Weekly+



# Monitor (29%) Snapshot

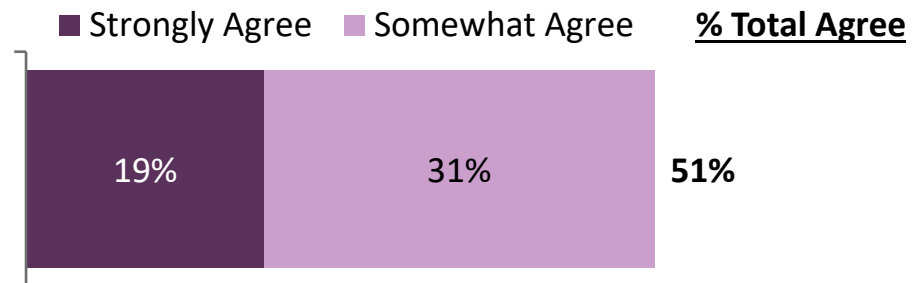
Showing Combined Q1 and Q2 Data; n=979

## Ridership Incentives



## Would Prefer to Take Caltrain

*“If I can take Caltrain to get to my destination, I would rather do that than drive”*



# Out of Target (26%) Key Findings

## ▶ **Out of Target:**

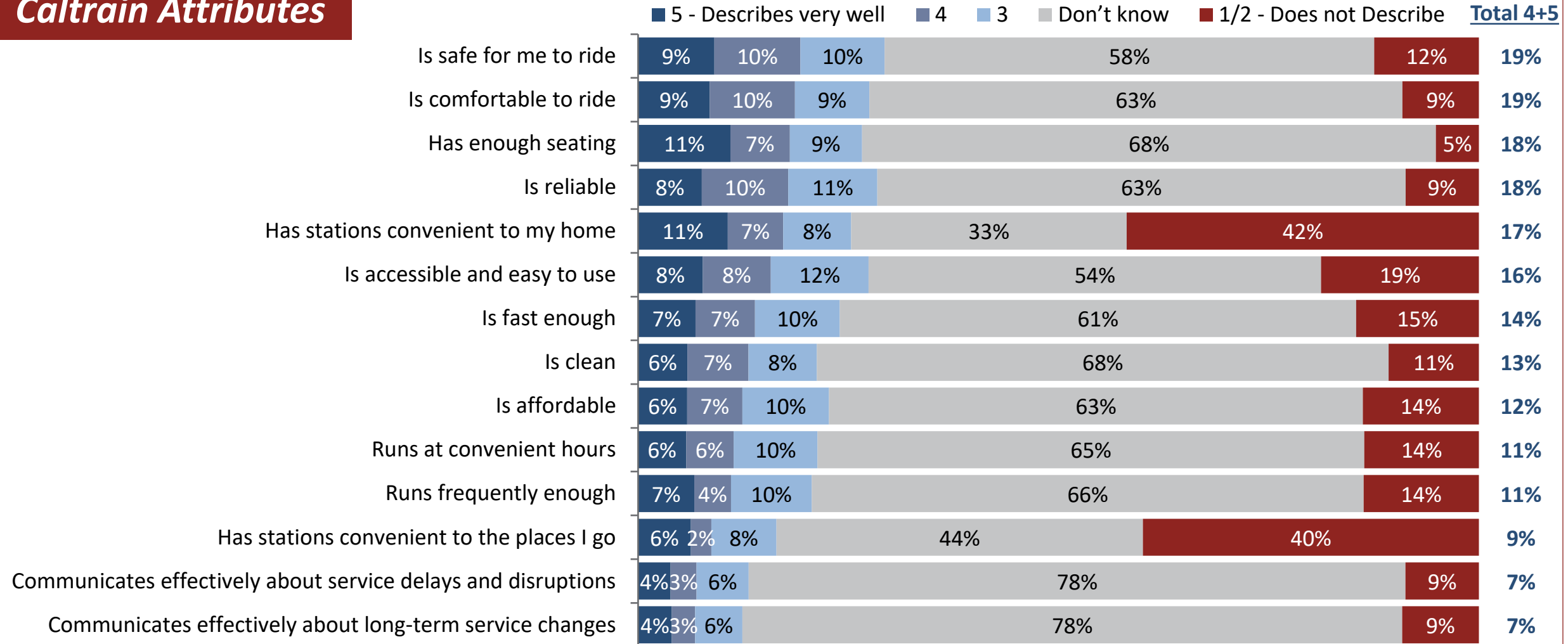
- This segment group is the least viable and consists of people who never ride Caltrain and are unlikely to consider it for their travel in any capacity.
- They are largely unfamiliar with Caltrain and lack strong opinions of the Agency, either way.
- The majority of respondents in this group believe Caltrain fundamentally cannot serve their travel needs.
- Few of the tested changes Caltrain is making or can make will encourage them to ride more often.



# Out of Target (26%) Snapshot

Showing Combined Q1 and Q2 Data; n=898

## Caltrain Attributes



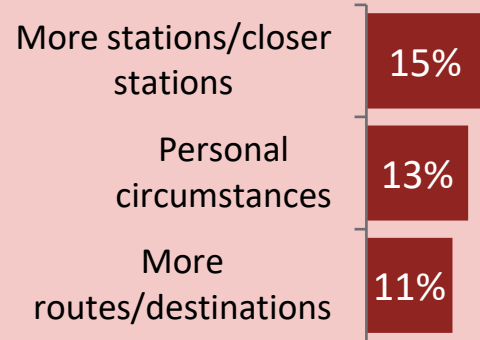
Q34-47. Based on what you may have experienced or heard regarding Caltrain, for each of the following phrases, please indicate how well you think that phrase describes Caltrain.

# Out of Target (26%) Snapshot

Showing Combined Q1 and Q2 Data; n=898

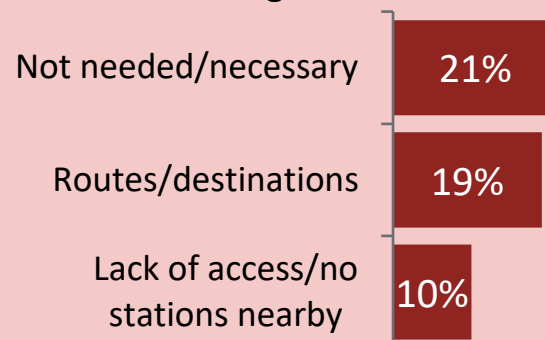
## Top-of-mind Incentives

Open-ended verbatims coded into categories shown below



## Top-of-mind Barriers

Open-ended verbatims coded into categories shown below



## Top 3 Attributes

**Caltrain...**

**1.) Is safe for me to ride:**

19% Describes, 9% Very well

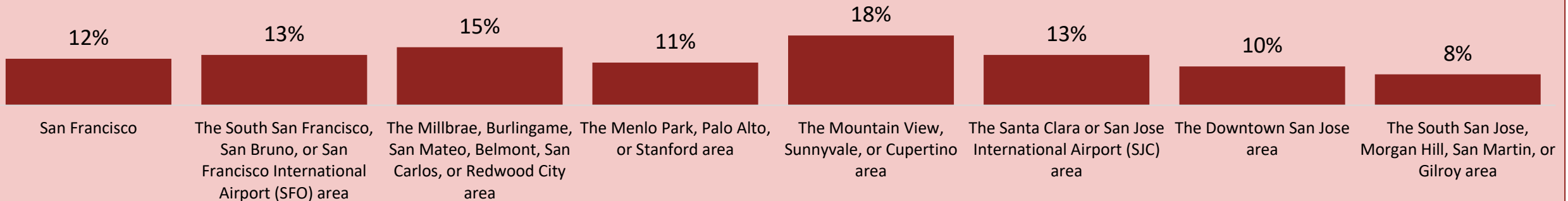
**2.) Is comfortable to ride:**

19% Describes, 9% Very well

**3.) Has enough seating:**

18% Describes, 11% Very well

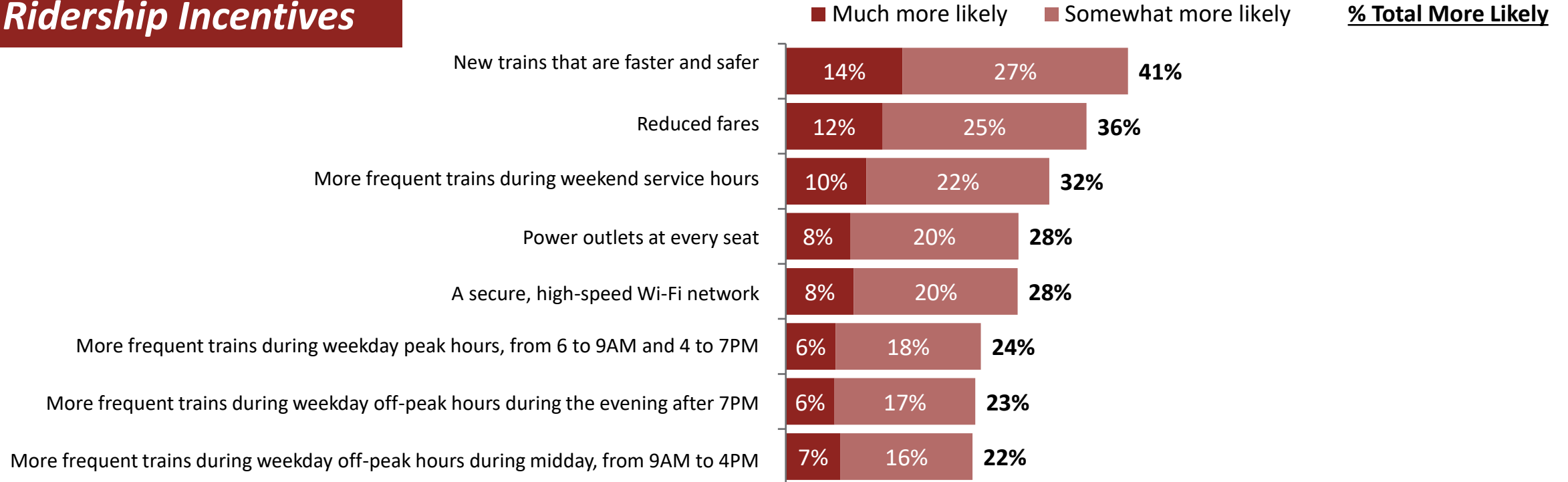
## Destination Frequency; Weekly+



# Out of Target (26%) Snapshot

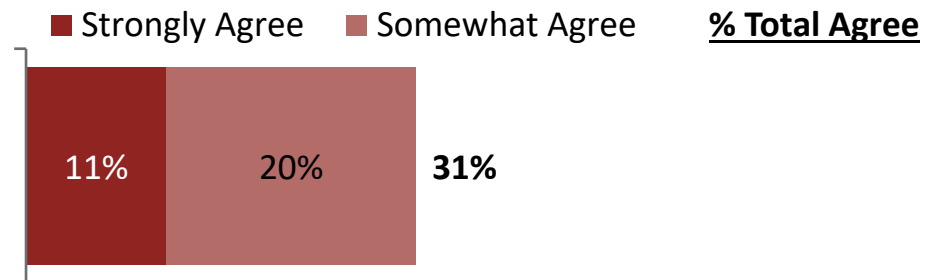
Showing Combined Q1 and Q2 Data; n=898

## Ridership Incentives



## Would Prefer to Take Caltrain

*“If I can take Caltrain to get to my destination, I would rather do that than drive”*

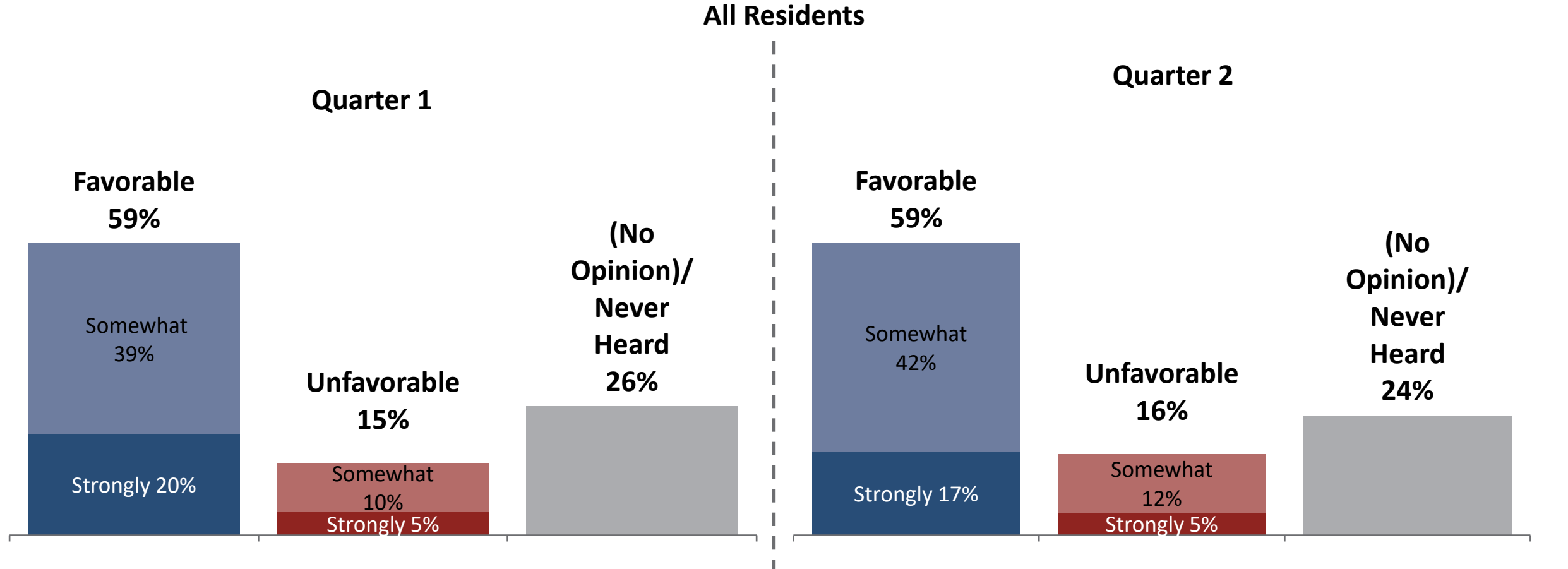




# Overall Caltrain Perceptions

# Caltrain Favorable Rating – Overall

*Residents generally have a favorable view of Caltrain, with more positive than negative perceptions. About a quarter of residents have no specific opinion.*

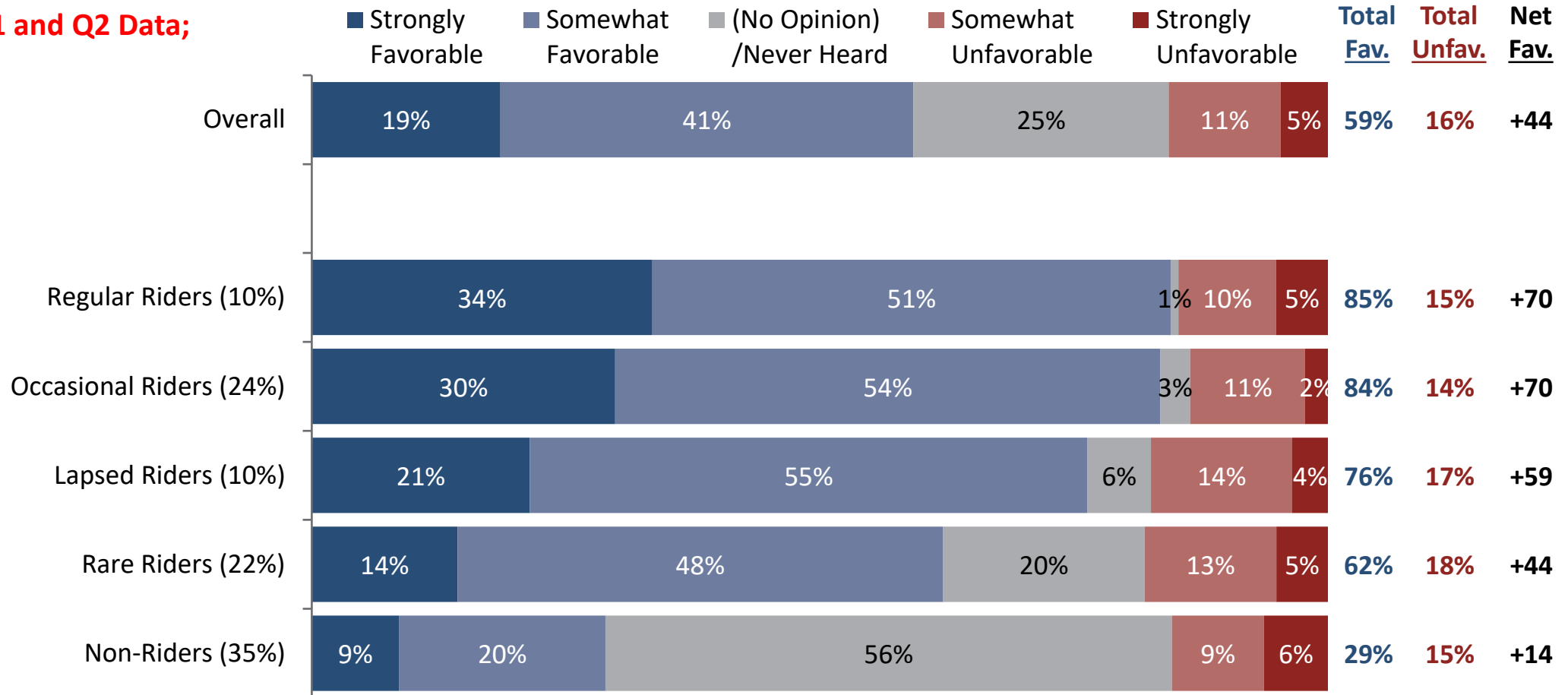


# Caltrain Favorable Rating – Ridership

*Regular riders, who utilize Caltrain on a monthly or more frequent basis, tend to hold a stronger positive opinion of the agency compared to those who ride less often. The majority of non-riders have no particular opinion of the agency, as their lack of direct engagement may limit their ability to form strong sentiments.*

**Showing Combined Q1 and Q2 Data;  
n=3,348**

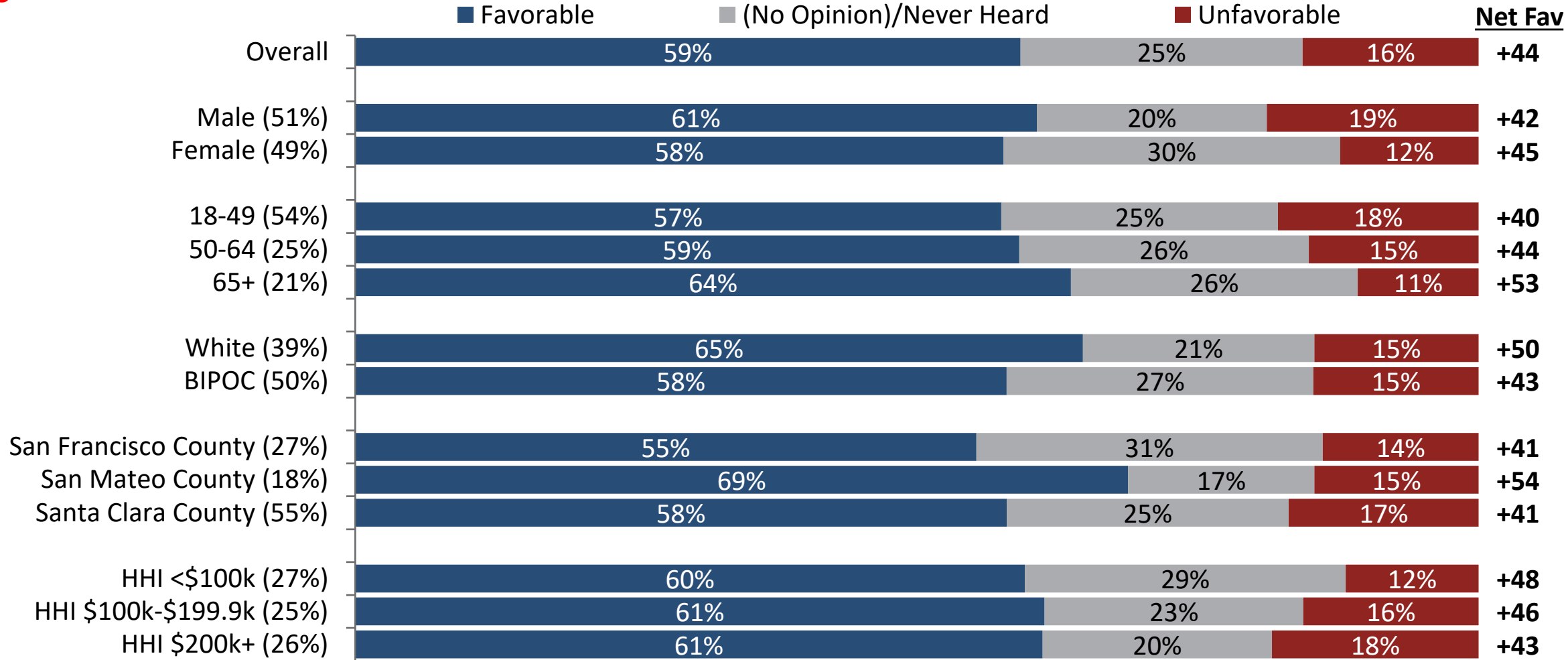
“I would say my opinion of Caltrain is very favorable... I super appreciate the bike friendliness on Caltrain, especially compared with basically any other transit agency I've ever used.”  
- Group 1, Frequent Riders



# Caltrain Favorable Rating

*San Mateo County Residents are more likely to be familiar with Caltrain and have a more favorable opinion.*

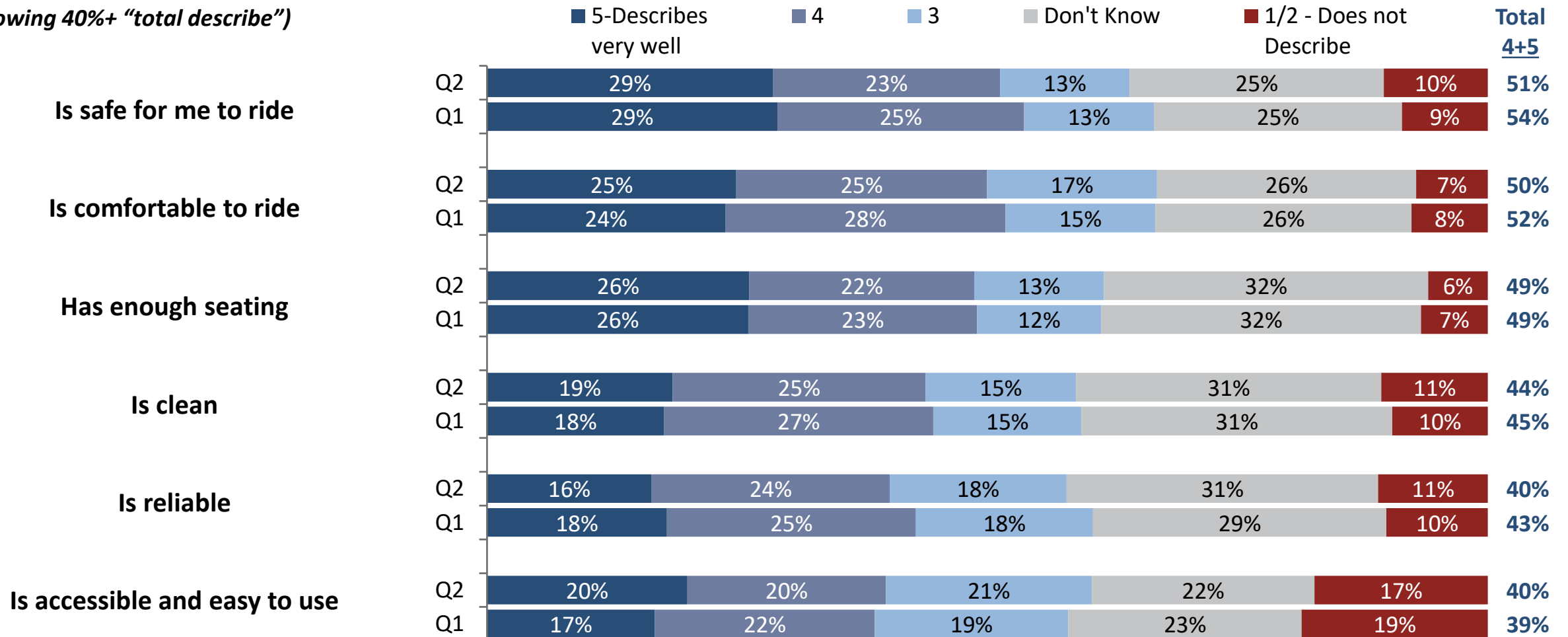
**Showing Combined Q1 and Q2 Data;  
n=3,348**



# Caltrain Attributes – Overall (Top Tier)

*The plurality of residents in quarter two indicate that Caltrain is comfortable to ride, has enough seating, is clean, reliable, and is accessible and easy to use.*

*(Showing 40%+ “total describe”)*



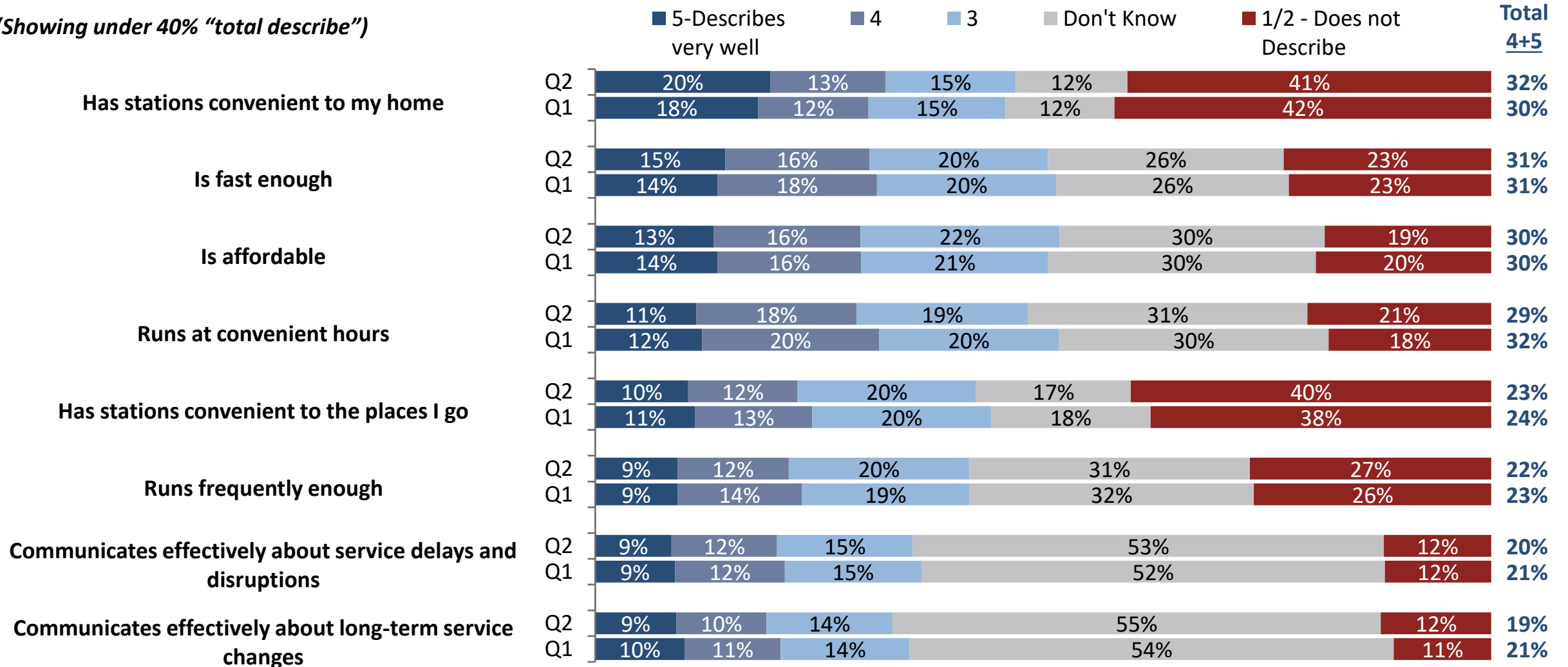
Q34-47. Based on what you may have experienced or heard regarding Caltrain, for each of the following phrases, please indicate how well you think that phrase describes Caltrain.



# Caltrain Attributes – Overall (Bottom Tier)

However, a plurality of residents indicate that Caltrain stations are not convenient to their home or the places they travel.

(Showing under 40% “total describe”)



Q34-47. Based on what you may have experienced or heard regarding Caltrain, for each of the following phrases, please indicate how well you think that phrase describes Caltrain.

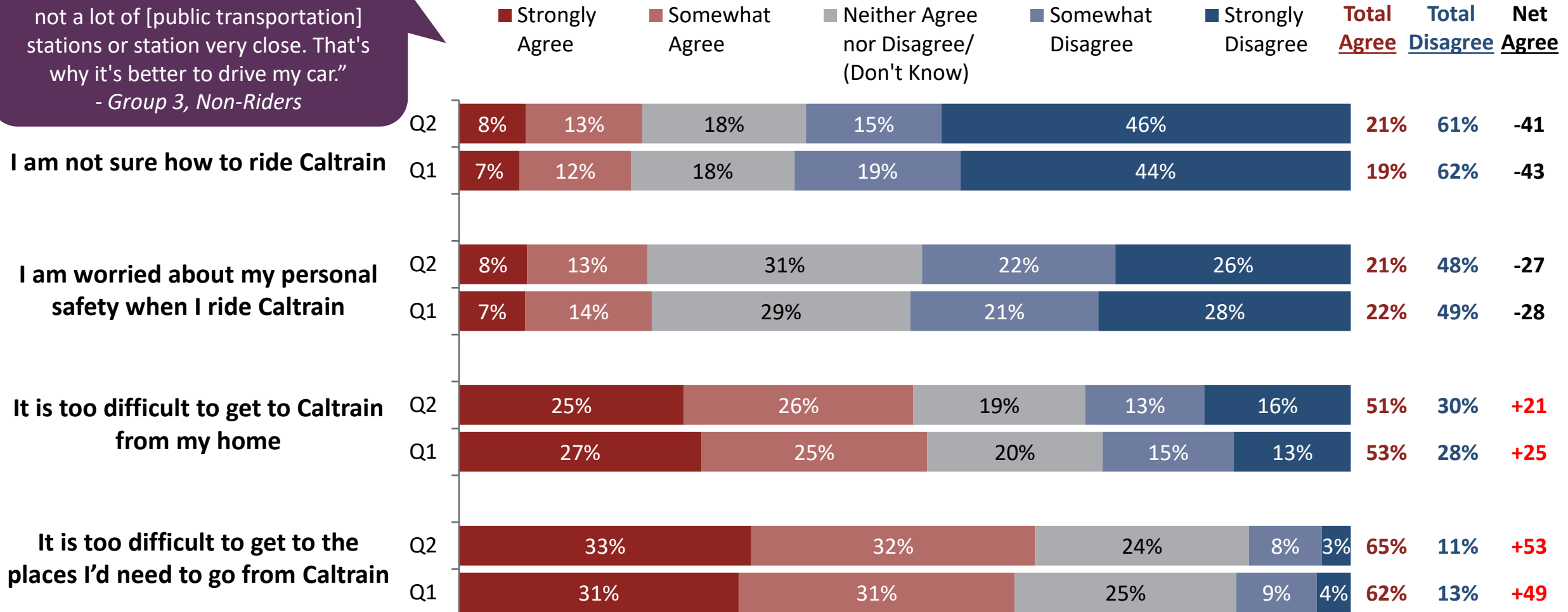


# Caltrain Attitudes, Barriers & Incentives

# Caltrain Barriers - Overall

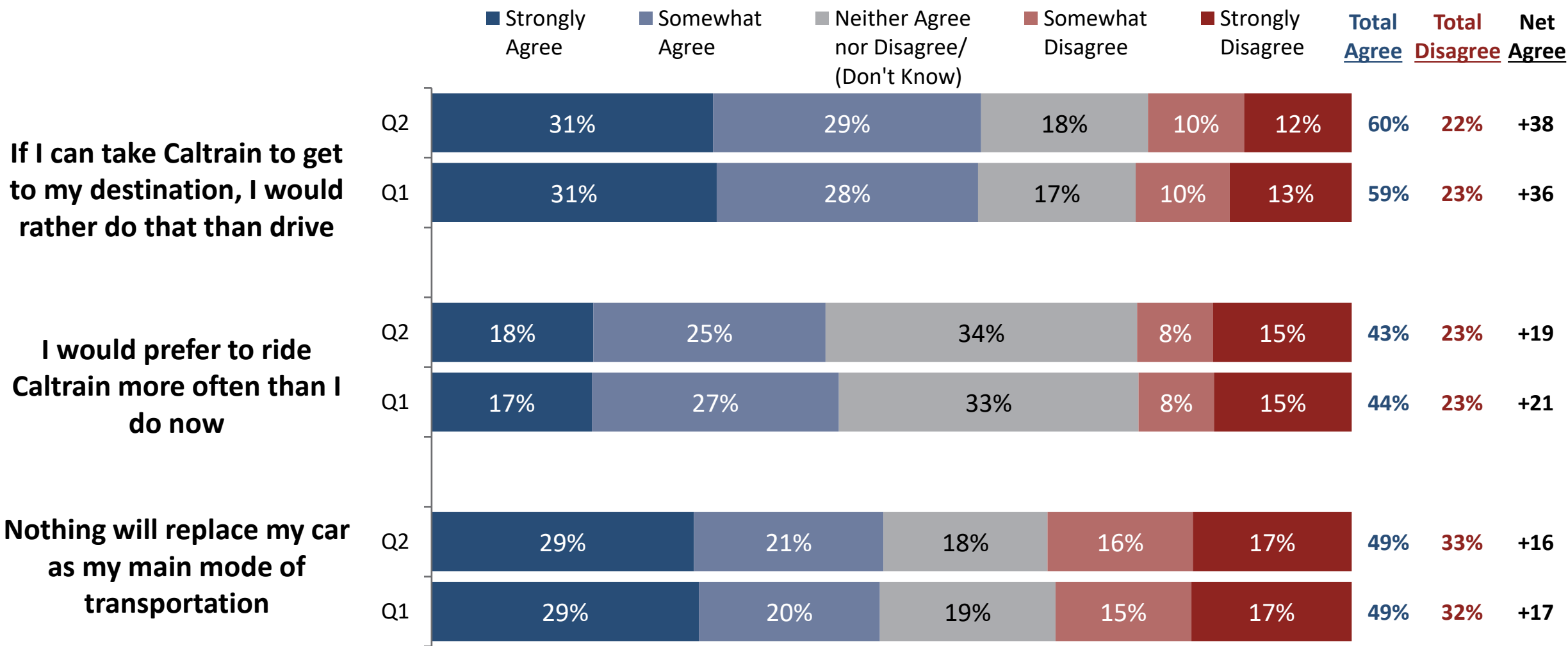
Over half of residents find it challenging to reach their homes or destinations using Caltrain.

“Yes, I drive all the time... There are not a lot of [public transportation] stations or station very close. That's why it's better to drive my car.”  
- Group 3, Non-Riders



# Transportation Preferences - Overall

*Over half of residents indicate that, when possible, they would rather take Caltrain to their destination than drive. Yet car dependency is high, as nearly half of residents state that nothing will replace their car as their main mode of transportation.*



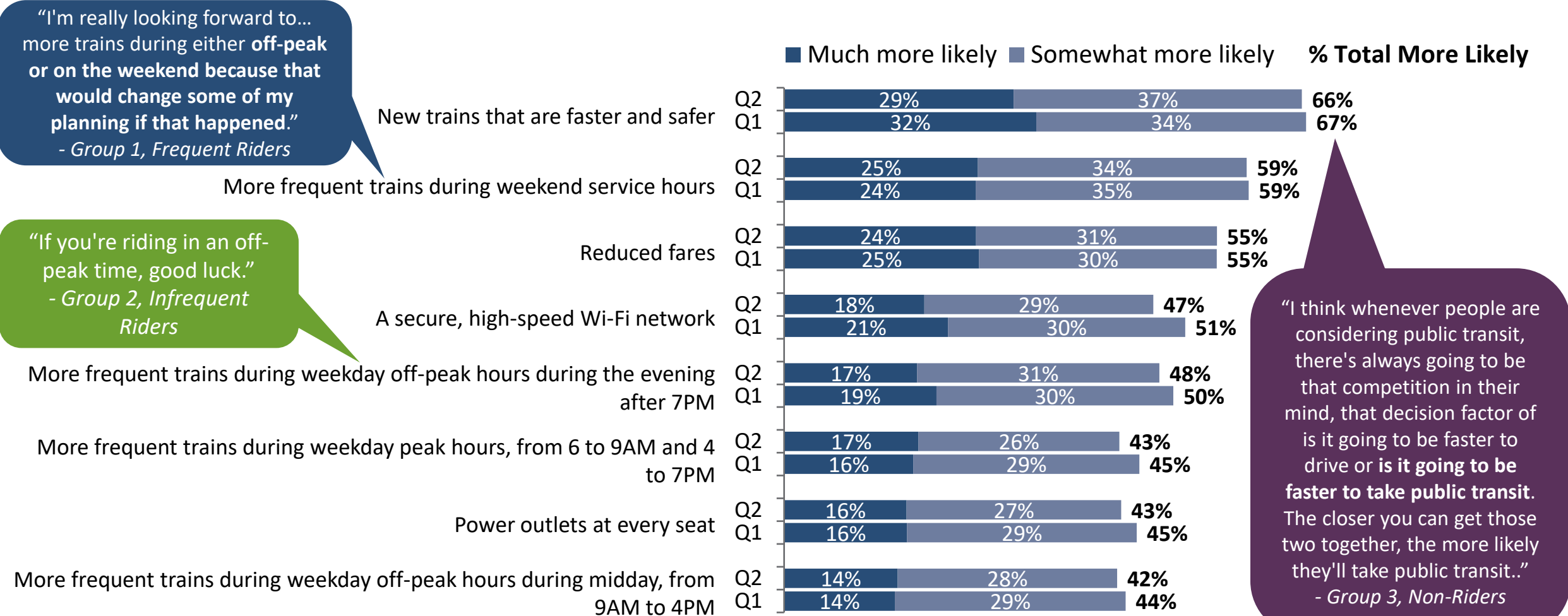
# Ridership Incentives - Overall

As consistent with quarter one, new trains that are faster and safer, more frequent weekend service, and reduced fares are the top changes respondents indicate would make them more likely to ride Caltrain more often.

"I'm really looking forward to... more trains during either **off-peak** or on the weekend because that would change some of my planning if that happened."  
- Group 1, Frequent Riders

"If you're riding in an off-peak time, good luck."  
- Group 2, Infrequent Riders

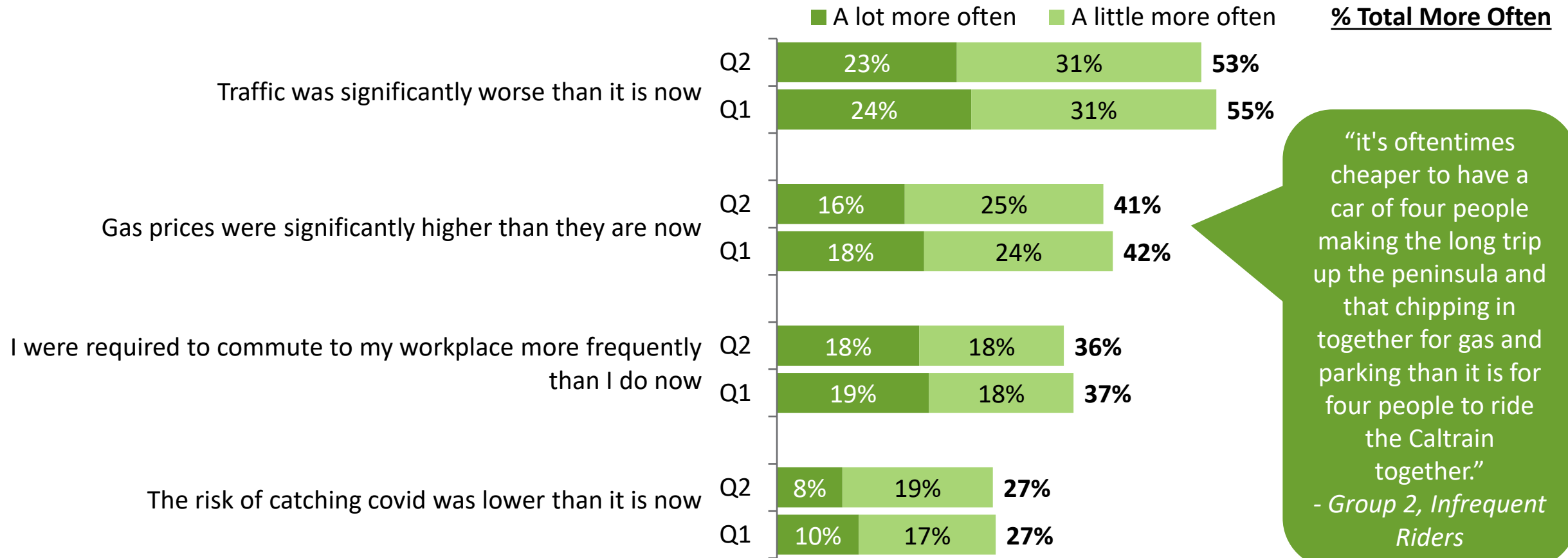
"I think whenever people are considering public transit, there's always going to be that competition in their mind, that decision factor of is it going to be faster to drive or is it going to be faster to take public transit. The closer you can get those two together, the more likely they'll take public transit."  
- Group 3, Non-Riders



Q62-69. Next, you will read about some changes Caltrain made recently or is currently making. For each one, please indicate whether that change makes you much more likely, somewhat more likely, or not more likely to ride Caltrain more often.

# Future Ridership Factors - Overall

The top reasons that residents indicated could lead to riding Caltrain more than their current usage levels are consistent with quarter one. Increased traffic and increased gas prices remain the primary factors that would motivate residents to ride Caltrain more often.



Q55-58. After each of the following, please indicate if you would ride Caltrain a lot more often, a little more often, or no more often.

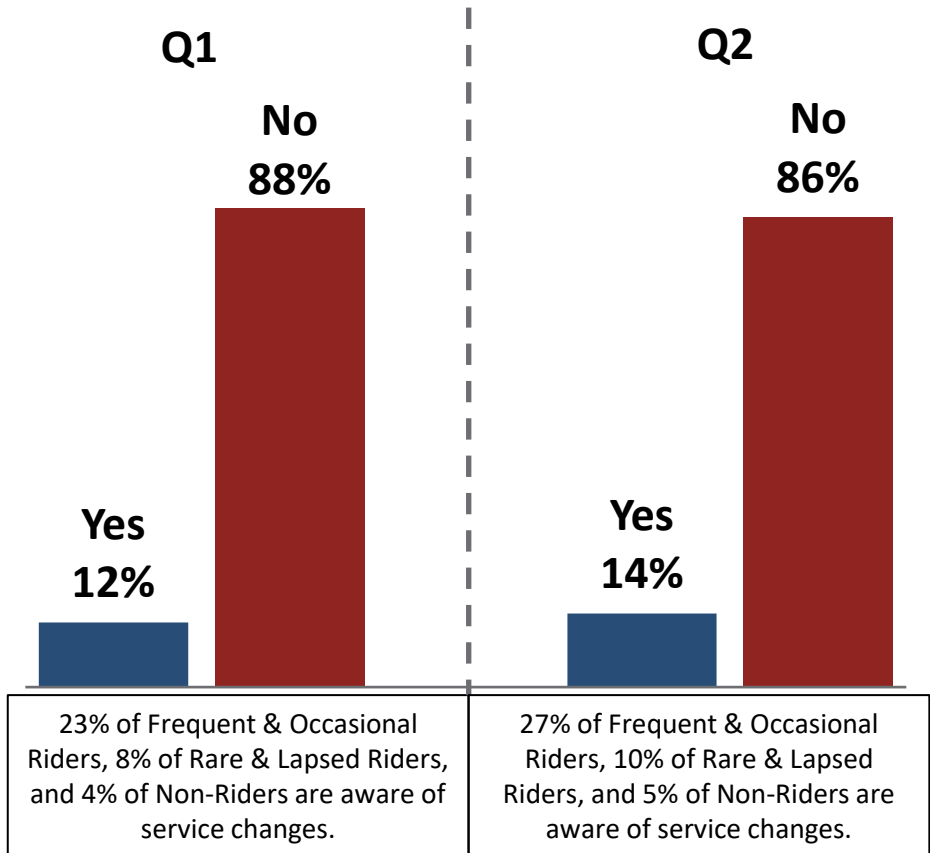


**Information Sources**

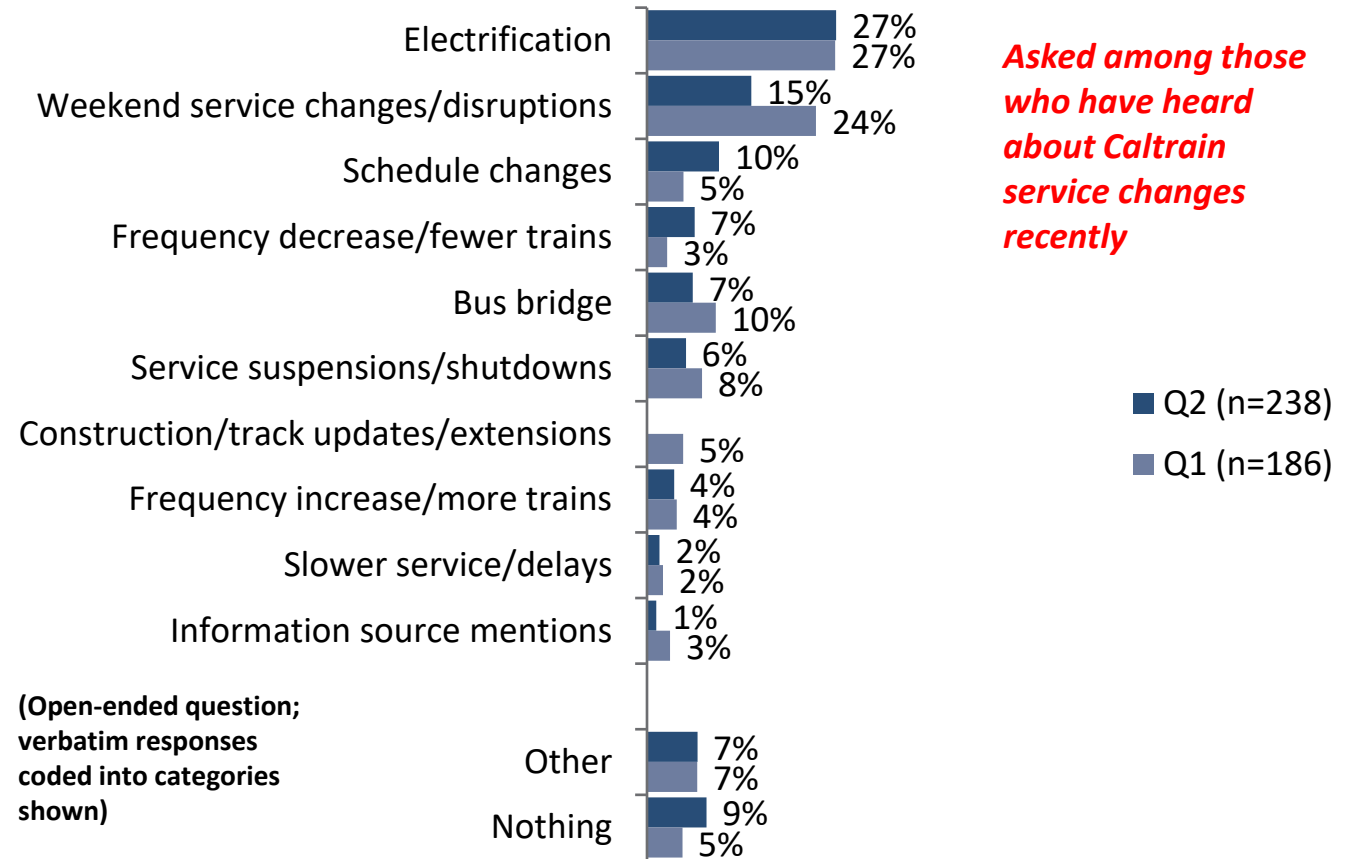
# Caltrain Service Changes Awareness

Most of the respondents were found to be unaware of any service changes on Caltrain. However, among those who have heard about any changes, electrification and weekend disruptions are the most frequently mentioned items.

## Have you heard anything about Caltrain service changes recently?



## What have you heard about Caltrain service changes recently?

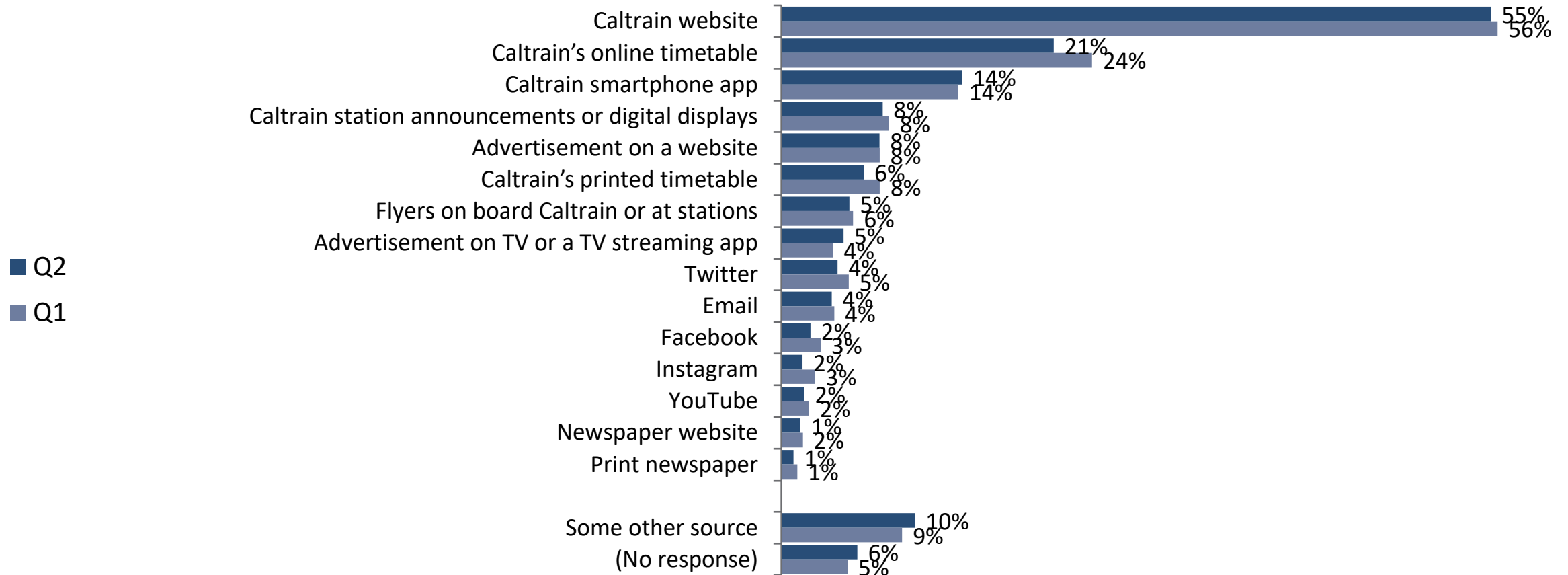




# Caltrain Information Sources

*The Caltrain website is by far the most mentioned source where respondents typically find information about Caltrain’s service and schedule.*

**How do you typically find information about Caltrain’s service and schedules? Please select all that apply.**  
*(Multiple responses accepted) (Open-ended question; verbatim responses coded into categories shown)*





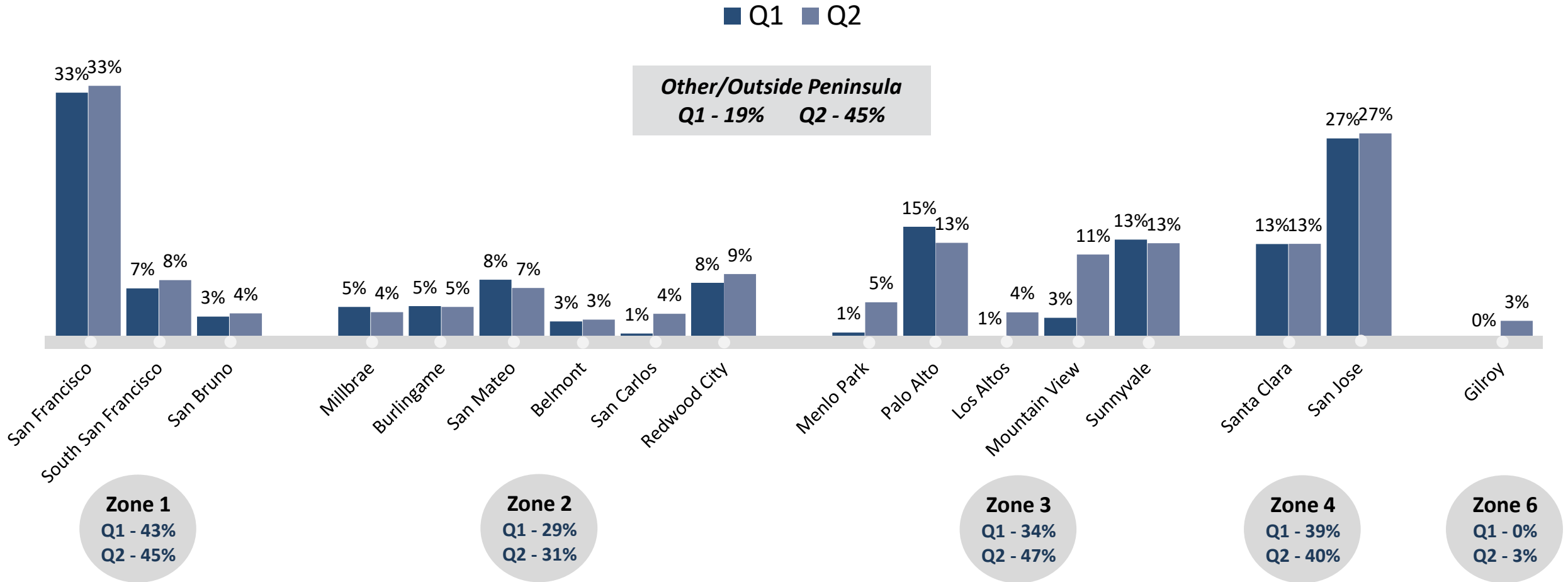
# Commute Behavior

*(Those who make physical commute trips; Q1 n=1,308, Q2 n=1,562)*

# Typical Destination – Commuters

San Francisco and San Jose are the most commonly reported destinations by physical commuters.

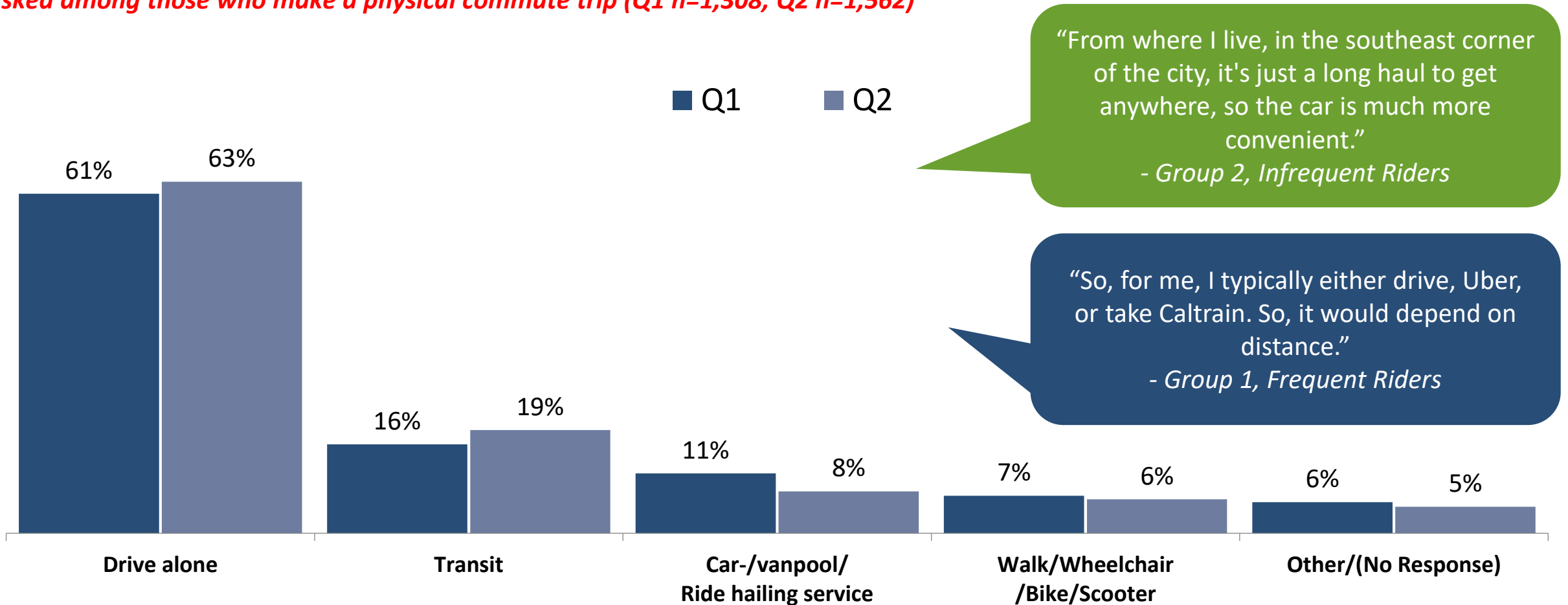
Asked among those who make a physical commute trip (Q1 n=1,308, Q2 n=1,562)



# Commute Mode – Commuters

*There has been a slight increase in the percentage of respondents who use transit for their physical commute trips compared to the previous quarter.*

*Asked among those who make a physical commute trip (Q1 n=1,308, Q2 n=1,562)*

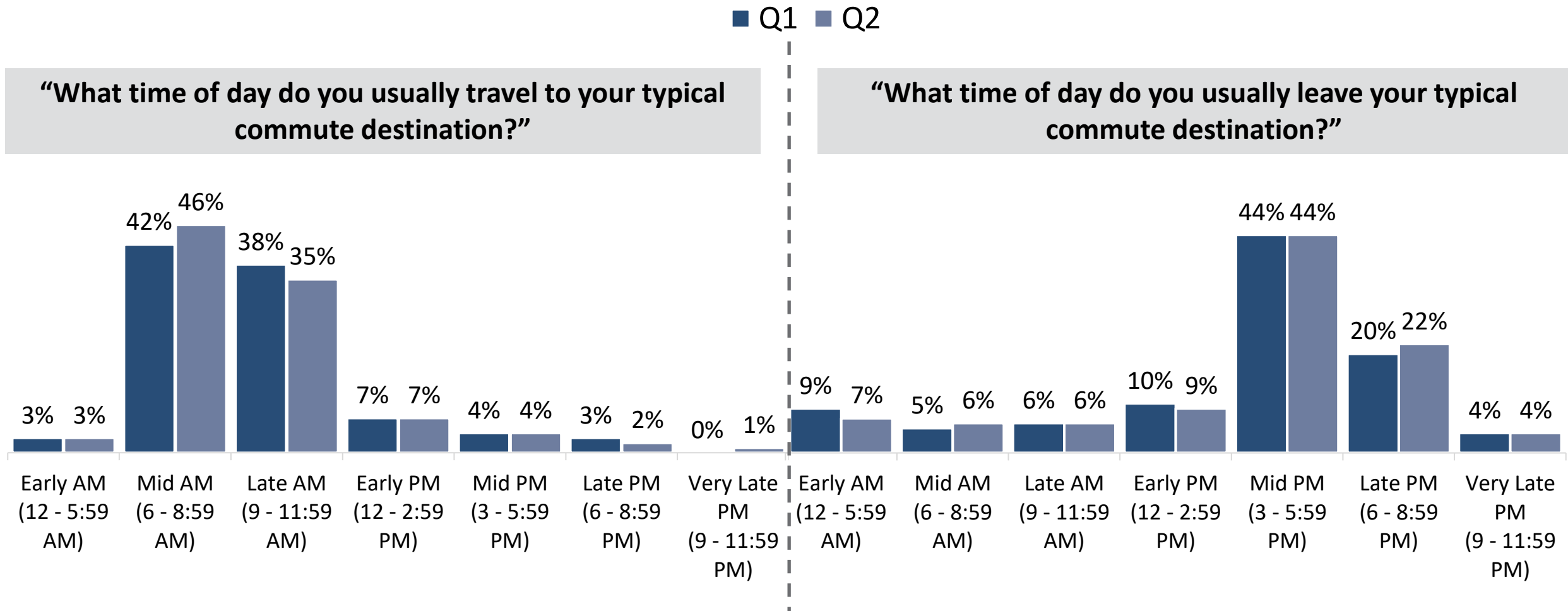


Q31. When you make trips to your typical commute location, how do you usually travel? If you use more than one mode, please select the one you use most often or for the longest distance of your trip.

# Commute Times – Commuters

The majority of commuters typically start their commute in the mid or late morning, while the largest group of commuters tends to return from their destination in the mid-afternoon.

Asked among those who make a physical commute trip (Q1 n=1,308, Q2 n=1,562)



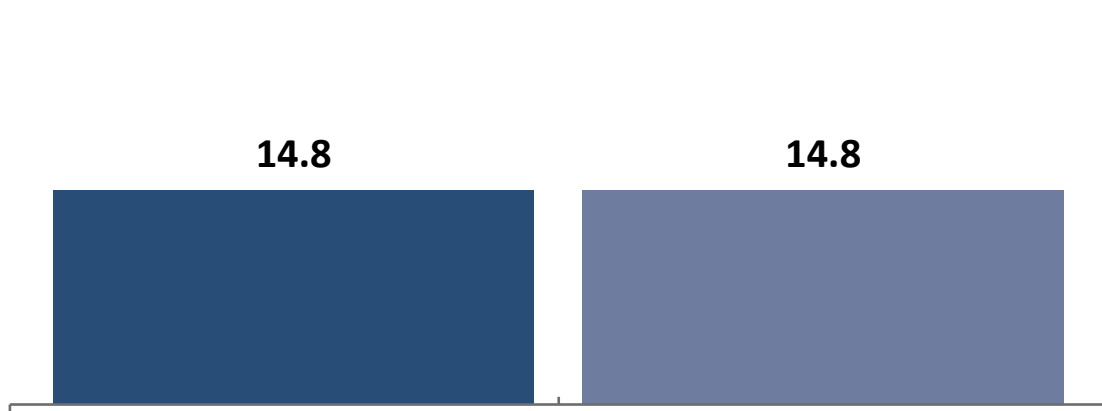
# Commute Duration – Commuters

Although the average distance reported by commuters is only 15 miles, the average travel time reported is equivalent to 41 minutes.

Asked among those who make a physical commute trip (Q1 n=1,308, Q2 n=1,562)

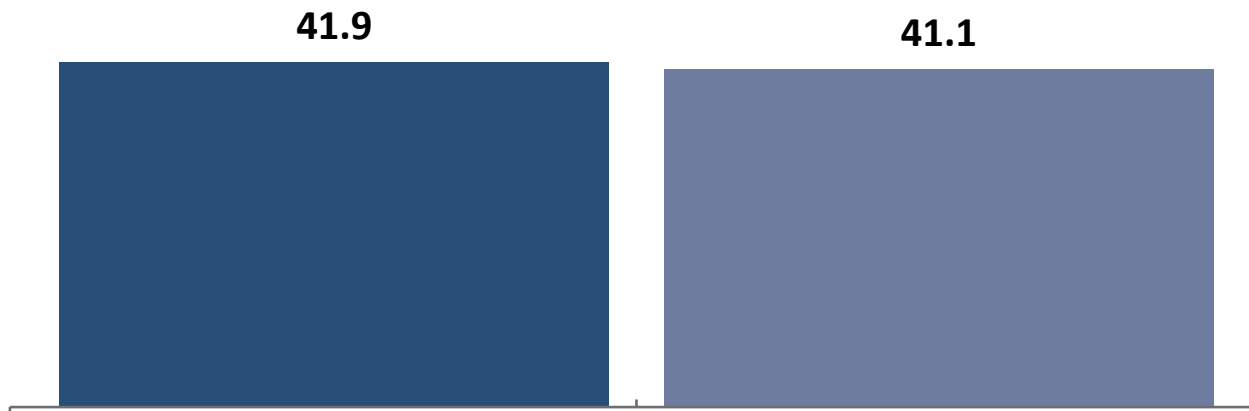
“About how many miles do you live from your typical commute destination?”

■ Q1  
■ Q2  
Mean Number of Miles



“About how long does that trip usually take you?”

■ Q1  
■ Q2  
Mean Number of Minutes





**Conclusions**

# Resident Survey: Summary

- ▶ While Caltrain's most loyal users hold favorable views of the agency, they are also the most critical of its infrequent service.
- ▶ For potential long-term riders, the biggest challenge is station location.
- ▶ All residents agree that Caltrain needs to improve its communication about service disruptions and long-term changes.
- ▶ To attract more riders, adding new trains and routes and increasing service frequency on weekends and evenings will have the most tangible impact on ridership.
- ▶ These measures could prove impactful in expanding ridership among current and prospective customers.





**Focus Groups  
Methodology & Key Findings**

# Focus Groups: Methodology

- ▶ A total of **three focus groups** were conducted with Bay Area residents.
  - Each group was moderated by a professional moderator. The groups were held online on June 14th and 15th.
  
- ▶ A prescreening survey was used to identify qualified participants for the study, which focused on the following rider audiences:
  - A) Frequent riders: those who currently ride at least once a week
  - B) Infrequent riders: those who ride Caltrain less than once a week, but within the last six months
  - C) Non-Riders/Lapsed riders: those who have never ridden Caltrain but are interested in riding, or those who used to ride but no longer do so.

***Please note that qualitative research is not designed to be representative and generalizable to the population, but rather to explore how participants view the issue in-depth, and in their own words.***

# Key Focus Group Findings

- ▶ Participants generally expressed positive opinions of Caltrain
- ▶ Most participants see themselves riding Caltrain more often – especially for sports and social events in the evening – but there is universal desire for an expanded schedule and greater service reliability.
- ▶ Participants who ride Caltrain regularly felt positive about the service overall and would take it more with improvements to train frequency and reliability.
- ▶ Those who ride Caltrain infrequently suggest they would ride more often for commute trips with more frequent service and faster travel times via trains.
- ▶ Several non-riders were open to riding Caltrain with groups to special events on evenings and weekends, which could be the key to moving the needle.
- ▶ Of the fare pass concepts tested, participants were most enthusiastic about the discounted group passes, especially for Giants games or other social events in San Francisco.



**Focus Group**  
**Different Group Perceptions**

# Focus Group Frequent Riders: Perceptions of Caltrain

*Frequent riders are satisfied with Caltrain but still think improvements could be made through expanding service times and increasing reliability.*

“I really like it. For years, ‘No, I’m not going to take the train,’ and then when I did I was pleasantly surprised. I’ve been taking it for about 10 years now and I like it. It gets me to the city and meeting friends along the peninsula from Sunnyvale. I’m happy, very happy with it.”

*- Group 1, Frequent Riders*

“I don’t mind if they’re a couple minutes late, but if they’re an hour late, to me that’s kind of unacceptable because I’m already at the train station.”

*- Group 1, Frequent Riders*

“So, maintaining frequency later in the day would definitely be good. And then also, as I’ve found with BART, the more trains you have running, the less bad a delay is, because it’s like, ‘Oh no, I missed my train.’ Five minutes later, ‘Oh look, a train going in the right direction.’”

*- Group 1, Frequent Riders*

# Focus Group Infrequent Riders: Perceptions of Caltrain

*Infrequent riders use Caltrain based on convenience. They typically will ride in situations in which it makes less sense to drive whether that's traffic, alcohol, or parking.*

"I was taking a night class in San Francisco at one point and it started at 7:00 and if I wanted to drive there, I'd have to leave at 4:30 because of how traffic was before the pandemic. So I just hopped on the Caltrain instead because traffic in the evening was killer."

- Group 2, Infrequent Riders

"I think for me, if time isn't a constraint, then I'm much more flexible and I like using Caltrain. But yeah, if I'm on a tight schedule, then I'm probably going to drive more. And usually with the Giants game, if it's a nighttime game, as much as I like taking Caltrain up there, I don't want to be forced onto that last train so it's really more about time and flexibility."

- Group 2, Infrequent Riders

"I think it depends on the distance. So I mentioned earlier, I would love to take Caltrain to work, but it takes longer and it costs \$12 a day so I'm not going to do that for that reason. The reasons I would take it is if it's to an event where parking's going to be really crazy, or if it's so that I am not drinking and driving."

- Group 2, Infrequent Riders

# Focus Group Non-Riders: Perceptions of Caltrain

*Potential riders are most open to utilizing Caltrain for social events with groups. Making the economics of group travel cheaper than rideshare and extending train times could motivate them to ride.*

“I guess the biggest factor, because I always wanted to go take it down into San Fran and stuff, but obviously, for live music stuff, that stuff happens later in the night, so if I get out of the concert at 11 or 12, a bit late time. I'm under a bit of a time crunch to try and make it back to get the last train back because that's about what, a half hour, 40 minute normal car ride that becomes an hour via Caltrain.”

*- Group 3, Potential Riders*

“It's expensive. Very expensive. Went to see a Giants game once and between me and my husband, it was cheaper to actually park there.”

*- Group 3, Potential Riders*

“I've always wanted to ride it. But the issue for me is that to get to the Caltrain from where I live, I would have to drive to Mountain View first. Which means that if it's a 30-minute drive, getting to Mountain View was 15 minutes of that anyways, so might as well drive all the way. So, if it was more than that one vertical line that the Caltrain runs along, then I would probably be writing it quite a bit. But, because it's so limited, I can't ride it.”

*- Group 3, Potential Riders*



**Focus Group**  
**Barriers and Incentives to Riding**



# Focus Group Frequent Riders: Barriers and Incentives

*Though they are not a direct comparison, the Maximize Engagement and Frequent Riders groups both mentioned that a lack of frequent service, especially on the weekends, is a large barrier. More frequent service would be a powerful incentive for increased ridership among both of these groups.*

“The trains run once an hour each way on the weekends, which is painful.”  
- Group 1, Frequent Riders

“I’ll definitely add that on weekends it does become much harder to plan to visit friends or do things because of the hour-long frequency. And same thing at evenings on weekdays.”  
- Group 1, Frequent Riders

“To answer the question, literally, what would make me take Caltrain more often? If there... was just faster service all the way along the line. Both in terms of frequency and the amount of time that I have to spend on the train. So basically, right now it takes me well over an hour. It's like an hour and a half commute. If that were under an hour due to location and service, I would go into work more often.”  
- Group 1, Frequent Riders

“On the weekends, they only run every hour or something like that... I would like it to be a little bit more frequent.”  
- Group 1, Frequent Riders

# Focus Group Infrequent Riders: Barriers and Incentives

*Among Infrequent Riders, the lack of easy connections to other transit options is a frequently-mentioned barrier. Similarly to the Strengthen Engagement group, schedules and limited frequency are a barrier that, if addressed, could become an incentive to ride more.*

*"I do think the issues people have mentioned, the interconnectedness to other systems. If you miss a train or it's delayed, it can really ruin all of your other plans... And also for me, the cost isn't prohibitive, but it is expensive, especially just with their zone system. So I like Caltrain, but I think that its deficiencies can make it hard to use sometimes."  
- Group 2, Infrequent Riders*

*"I think one big thing on that is just there's almost no interconnectedness with surrounding systems. If I knew I could get off somewhere and have a transfer pass onto a bus to go somewhere else, it would be easy-peasy..."  
- Group 2, Infrequent Riders*

*"I think just make it easier for me to ride it. If I know that I can show up and I have to wait 10 to 15 minutes for the next train, totally fine... I think just reduce the friction, so it's just easy for me to make that decision"  
- Group 2, Infrequent Riders*

*"I'm trying to think of the times that I weigh BART versus Caltrain. And at first I was thinking that it was based on where I was going. And then I realized that no... it's frequency. Because if I show up at the Caltrain station and I miss it, it sucks. But if I show up at the Millbrae station to take BART, I'll wait an extra 15 minutes."  
- Group 2, Infrequent Riders*

# Focus Group Non-Riders: Barriers and Incentives

*Non-Riders focus primarily on cost and convenience. They have some openness to trying Caltrain for special events, especially if it can become more cost competitive compared to driving.*

“For me, it's like the expense of it, especially for myself, I'd want to go to San Jose and go down there, it gets really expensive comparatively to just driving when it's the three of us. And so, it's just like, ‘Well, I'm going to spend like \$25,’ it feels like a lot. Round trip tickets to get down there at least, then I might as well just spend that on the gas money and then, we have the car and then we have other stuff and don't have to worry about it.”

*- Group 3, Non-Riders*

“Caltrain could then put some incentives to bundle both a group travel pass with tickets to the Giants games and just kind of package that at a discount, and that might incentivize people to go more often and stuff and ride the Caltrain more.”

*- Group 3, Non-Riders*

“Yeah, I was just going to second what Jack said, the I would ride it more if it was quicker.”

*- Group 3, Non-Riders*

“Some form of an express train, that would make it way more efficient. And then the difference versus driving or versus taking BART starts to grow and then I have much more of an incentive to make Caltrain work for me.”

*- Group 3, Non-Riders*

# Biggest Changes Caltrain Could Make

- ▶ More security at stations, especially at night
- ▶ Food options and coffee shops in stations to increase foot traffic and make the wait between trains more engaging
- ▶ Better transfer/connection wayfinding
- ▶ Easier to park at stations and sufficient security to leave car all day

# Focus Groups: Fare Ideas Tested

- ▶ Among the fare ideas tested in the focus groups, interest was highest in discounts for groups
  - Participants were most excited about the idea of going with friends out at night to things like Giants games or events in the City.
- ▶ Additionally, those who currently ride Caltrain regularly reacted positively to the fare capping concept, especially as it takes the guesswork out of how much they expect to ride to make a monthly pass worthwhile.
- ▶ The three-day pass resonated less with participants across the board. Most who work remotely do not work three days in a row and those who work every day would rather buy a monthly pass.

“Yes. I think [discounted group fares] would help because it's a lot easier to grab a bunch of friends and say, Hey, let's go to the station, go to the city, and then we can come home and it'll be cheaper than if we drove...”

- Group 1, Frequent Riders

“...If you're a group of five people, it's like, ‘Oh hey, you know what? That's actually a great option because parking at this random thing that I'm going to is probably 40 bucks. So why don't I just pay and then I can enjoy as many beers as I'd like and not have to worry about sobering up before I go home.’”

- Group 2, Infrequent Riders



**Appendix**

# Top-of-Mind Barriers to Riding Caltrain

Showing Combined Q1 and Q2 Data; n=3,348

In general, what is the main thing that keeps you from riding Caltrain, if anything?

(Open-ended question; verbatim responses coded into categories shown)

	Overall	Maximize Engagement (9%)	Strengthen Engagement (16%)	Longer-Term Convertible (19%)	Monitor (29%)	Out of Target (26%)
Routes/destinations	19%	11%	19%	23%	18%	19%
Not needed/necessary	13%	3%	10%	6%	15%	21%
Lack of access/no stations nearby	11%	7%	10%	20%	8%	10%
Schedule	10%	29%	13%	12%	7%	2%
Slow/takes too long	7%	9%	8%	9%	7%	5%
Not convenient	6%	3%	5%	7%	7%	8%
Have a car/prefer to drive	4%	1%	2%	1%	5%	8%
Cost	4%	6%	6%	3%	5%	4%
Safety concerns/crime	3%	2%	2%	2%	2%	3%
No longer commute/retired/work remotely	3%	3%	5%	1%	5%	1%
Short commute/live near my destination	2%	0%	3%	1%	2%	2%
Transportation to/from station	2%	2%	2%	3%	2%	1%

# Caltrain Ridership Factors by Potential Rider Segmentation



Showing Combined Q1 and Q2 Data; n=3,348

% More Often (a lot + a little)

	Overall	Maximize Engagement (9%)	Strengthen Engagement (16%)	Longer-Term Convertible (19%)	Monitor (29%)	Out of Target (26%)
Traffic was significantly worse than it is now	54%	70%	73%	62%	51%	34%
Gas prices were significantly higher than they are now	41%	55%	55%	46%	39%	27%
I were required to commute to my workplace more frequently than I do now	36%	64%	51%	40%	31%	21%
The risk of catching covid was lower than it is now	27%	32%	39%	33%	23%	18%

Q55.-Q58. After each of the following, please indicate if you would ride Caltrain a lot more often, a little more often, or no more often.



# Ridership Incentives by Potential Rider Segmentation

Showing Combined Q1 and Q2 Data; n=3,348

% More Likely (Much + Somewhat)

	Overall	Maximize Engagement (9%)	Strengthen Engagement (16%)	Longer-Term Convertible (19%)	Monitor (29%)	Out of Target (26%)
New trains that are faster and safer	66%	88%	85%	78%	64%	41%
More frequent trains during weekend service hours	59%	84%	77%	71%	58%	32%
Reduced fares	55%	72%	73%	59%	55%	36%
A secure, high-speed Wi-Fi network	49%	66%	66%	57%	47%	28%
More frequent trains during weekday off-peak hours during the evening after 7PM	49%	79%	66%	58%	47%	23%
More frequent trains during weekday peak hours, from 6-9AM and 4 -7PM	44%	69%	61%	56%	37%	24%
Power outlets at every seat	44%	61%	59%	51%	39%	28%
More frequent trains during weekday off-peak hours during midday, from 9AM-4PM	43%	69%	56%	53%	39%	22%

Q62.-Q69. Next, you will read about some changes Caltrain made recently or is currently making. For each one, please indicate whether that change makes you much more likely, somewhat more likely, or not more likely to ride Caltrain more often.

# Top-of-Mind Ridership Incentives

Showing Combined Q1 and Q2 Data; n=3,348

And what is the main thing Caltrain could change to make you more likely to ride more often in the future, if anything?

(Open-ended question; verbatim responses coded into categories shown)

	Overall	Maximize Engagement (9%)	Strengthen Engagement (16%)	Longer-Term Convertible (19%)	Monitor (29%)	Out of Target (26%)
More stations/closer stations	15%	4%	14%	24%	11%	15%
Schedules/more trains/frequent service	13%	40%	18%	13%	11%	2%
More routes/destinations	12%	9%	11%	18%	10%	11%
Personal circumstances	8%	3%	6%	2%	9%	13%
Lower cost/cheaper	6%	7%	8%	4%	8%	5%
Transportation to/from station	6%	3%	7%	11%	4%	3%
Faster/shorten travel time	5%	8%	5%	7%	7%	2%
Improve safety	3%	1%	3%	3%	3%	5%
Improve convenience/ease of use	2%	2%	2%	3%	2%	2%

Note: Showing responses 2% and greater; excluding responses coded as "other" and "Don't know"

# Demographic Profile

	Overall		Regular & Occasional Riders		Rare & Lapsed Riders		Non-Riders	
	Q1	Q2	Q1 (35%)	Q2 (32%)	Q1 (32%)	Q2 (32%)	Q1 (33%)	Q2 (36%)
Male	51%	51%	58%	51%	50%	56%	44%	47%
Female	49%	49%	42%	49%	50%	44%	56%	53%
18-29	14%	13%	17%	21%	9%	9%	15%	10%
30-39	21%	21%	25%	24%	21%	18%	16%	21%
40-49	19%	19%	20%	14%	18%	22%	19%	22%
50-64	25%	25%	23%	24%	27%	28%	26%	24%
65+	21%	21%	15%	17%	24%	23%	24%	24%
White	39%	39%	43%	46%	41%	40%	33%	33%
Hispanic/Latino	15%	15%	17%	13%	14%	14%	13%	18%
AAPI	28%	27%	25%	24%	27%	29%	32%	29%
Other BIPOC	7%	7%	8%	7%	6%	8%	7%	6%
Homeowner	55%	55%	51%	47%	59%	63%	56%	56%
Renter/Other	45%	45%	49%	53%	41%	37%	44%	44%
San Francisco County	27%	27%	26%	24%	27%	28%	28%	29%
San Mateo County	18%	18%	24%	24%	16%	18%	14%	13%
Santa Clara County	55%	55%	51%	52%	57%	54%	58%	58%



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