



Q1 2023 Caltrain Ridership Growth Survey April 2023

Project Purpose

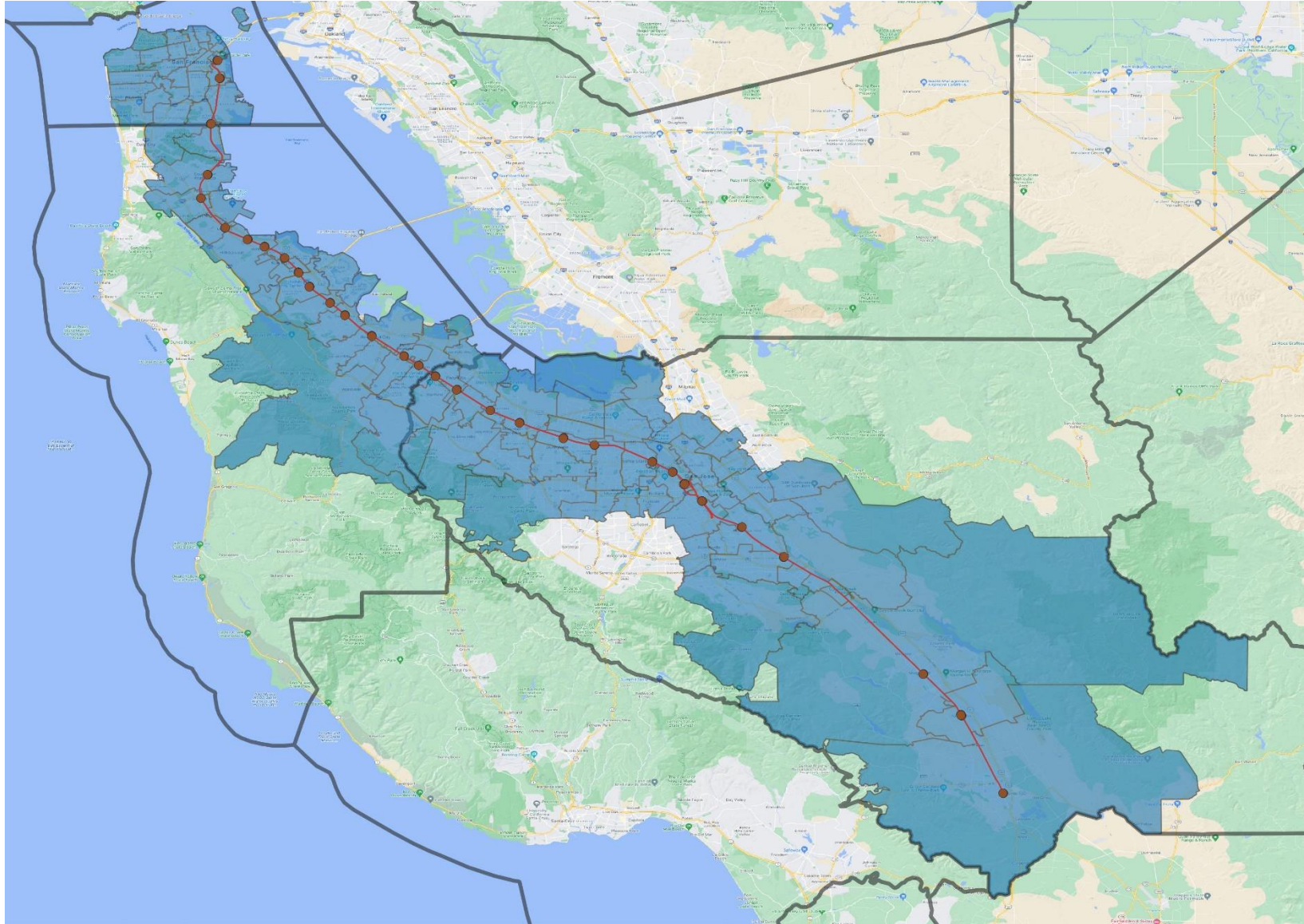
- ▶ Tracking various aspects of residents' travel and commute behavior throughout the Bay Area, and understand how their behavior may change in the future;
- ▶ Measuring awareness and perceptions surrounding public transit and Caltrain, specifically, including various aspects of the Agency's communications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

Methodology

- ▶ Online survey of adult residents in communities served by Caltrain throughout San Francisco, San Mateo, and Santa Clara Counties
- ▶ Survey conducted February 23 – March 15, 2023
- ▶ Respondents invited to participate via email and text-to-web
- ▶ 1,532 interviews; margin of error ± 2.50 percentage points
- ▶ Interviews 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
San Francisco	27%
San Mateo	18%
Santa Clara	55%

Key Findings

- ▶ In Q1 2023, roughly three quarters of residents report making physical commute trips and half work remotely at least once a week. Of those who work from home, most do not plan to reduce their remote frequency, while a quarter anticipate making physical commute trips more often in the coming months.
- ▶ A vast majority of residents rely on driving alone to get around. About 1-in-10 report riding Caltrain monthly, and around a third use the service at least a few times a year.
- ▶ Regional residents generally have favorable opinions of Caltrain, with regular riders (those who ride a few times a month or more) giving the Agency especially strong marks.
- ▶ While Caltrain is viewed as safe and comfortable, the plurality of respondents reported that the service does not have convenient stations and frequent enough service to fully replace driving as their primary mode of transportation.

Key Findings

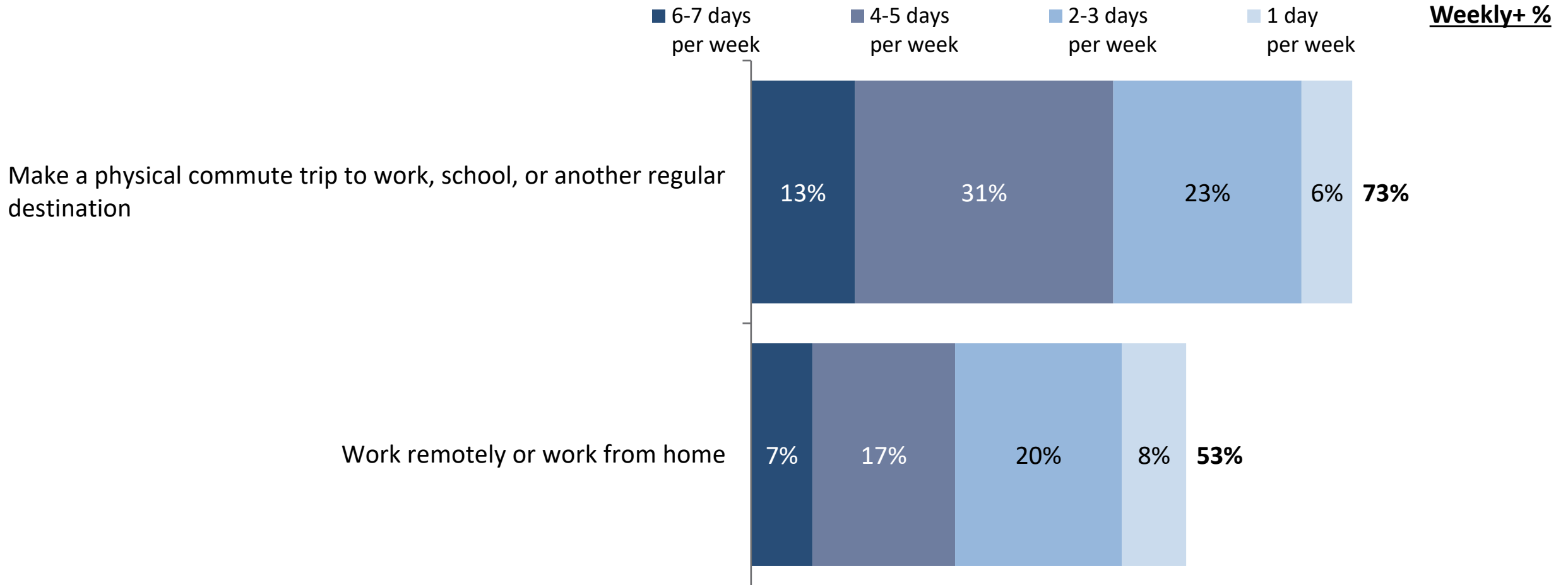
- ▶ New trains and more frequent weekend services would have the greatest impact on increasing ridership, as respondents also indicate that having more stations, more frequent services, and more routes would increase ridership overall.
- ▶ The most common barriers to using Caltrain are inconvenient stations, infrequent service, difficulty accessing Caltrain from homes, and reaching destinations from the station.
- ▶ Respondents are generally unaware of any service changes on Caltrain, but electrification and weekend disruptions are the most frequently mentioned items. The Caltrain website is the most mentioned source for information about Caltrain's service and schedule.



Overall Commuter Behavior

Commute Frequency

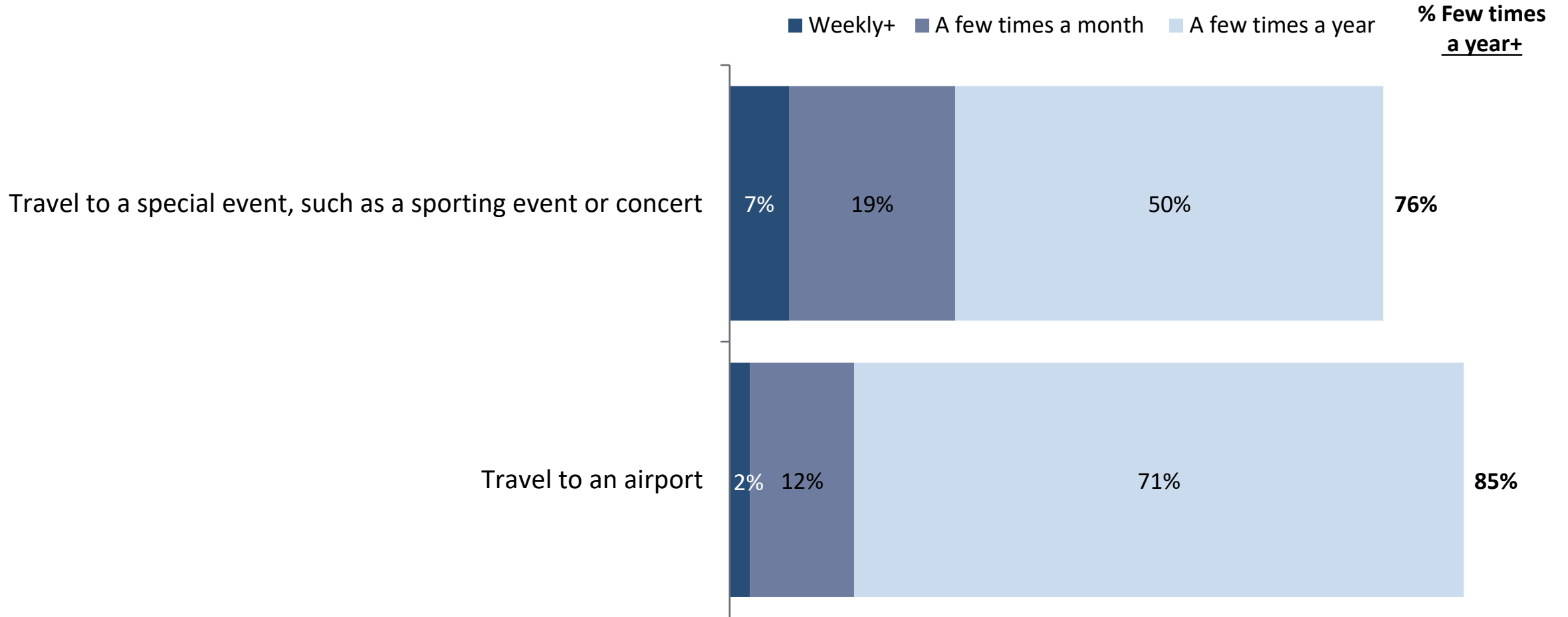
A strong majority of respondents make a physical commute on a weekly basis, while just over half of them reported working remotely at least once a week.



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

A majority of respondents reported traveling to a special event or an airport a few times a year or more.



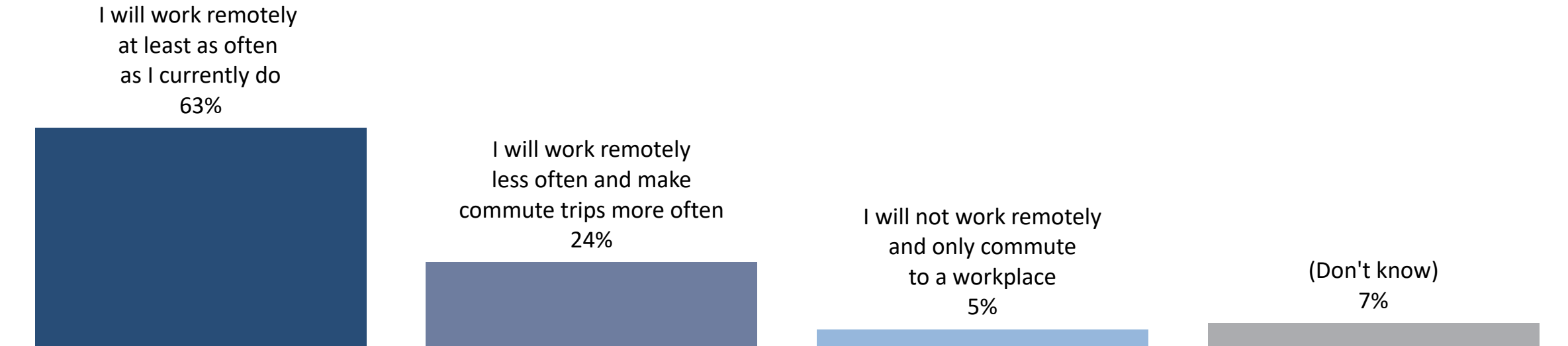
Q12-Q15. These next questions are about your local travel around the Bay Area. Please indicate how often you do each of the following, on average.

Future Remote Work Frequency

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

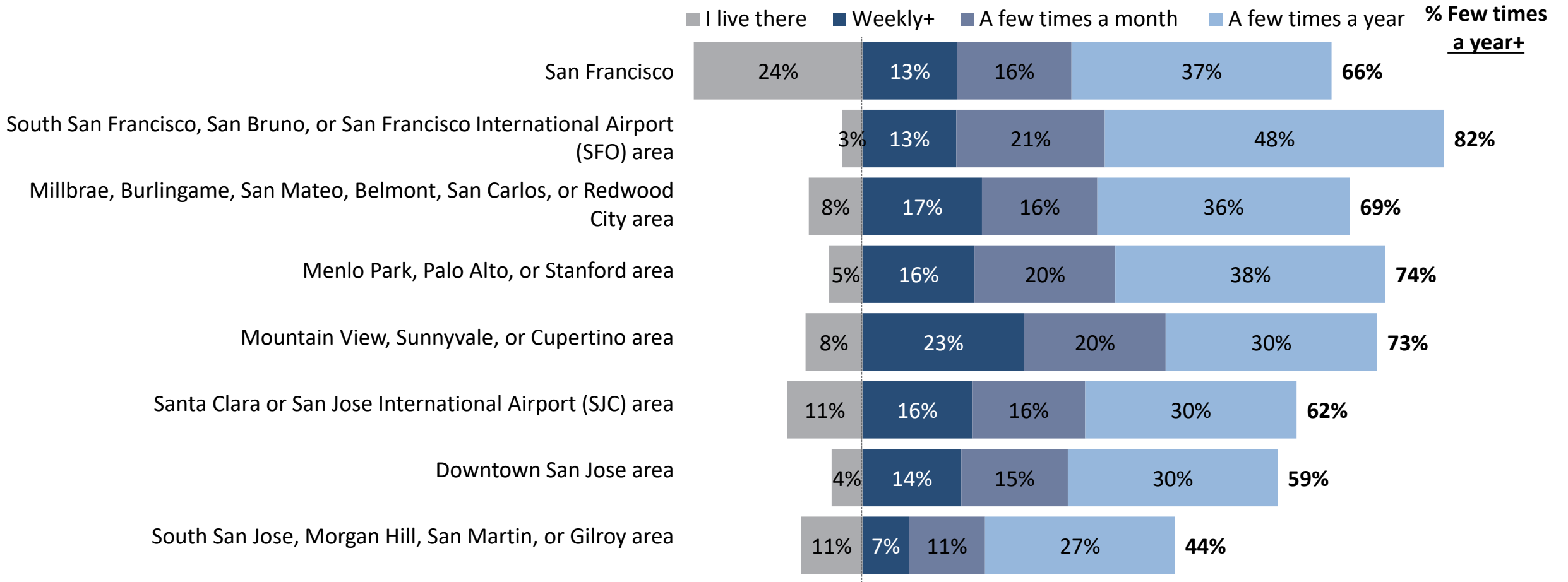
Asked among those who work remotely a couple times per month or more (n=875)

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



Destination Frequency

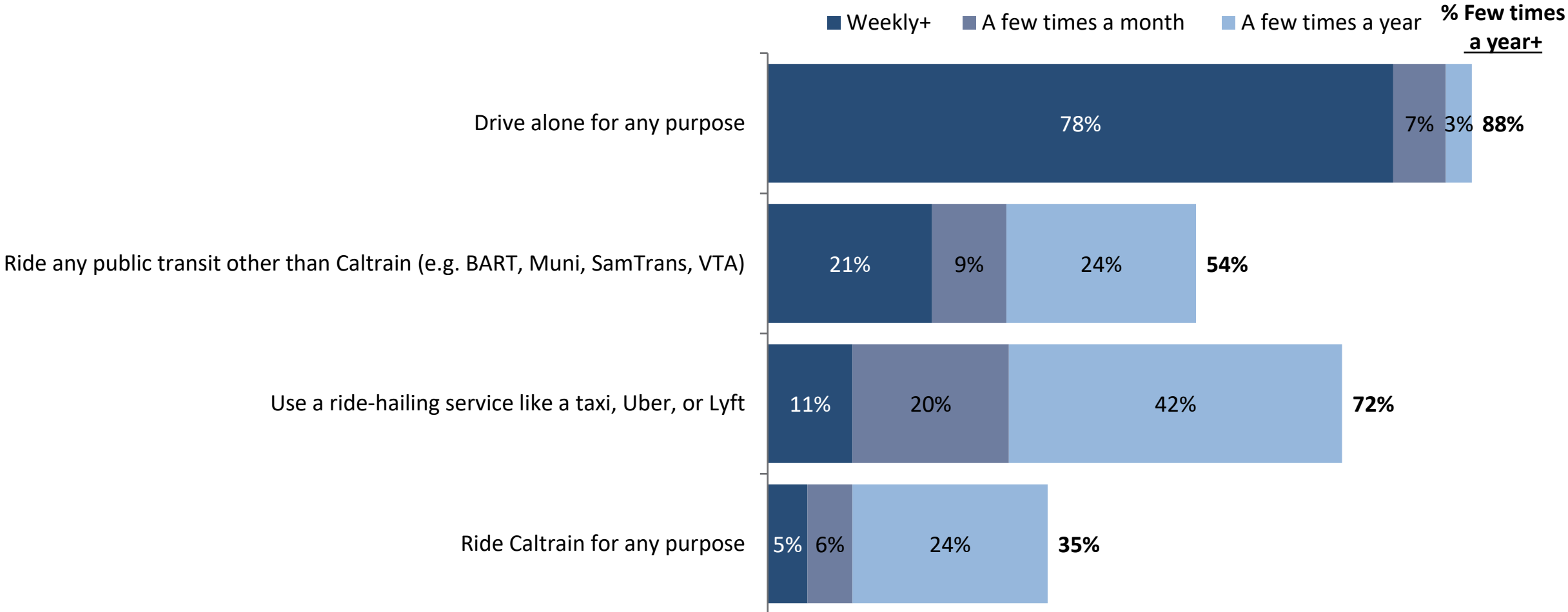
A quarter report commuting to Mountain View, Sunnyvale, or Cupertino in the San Francisco Peninsula area on a weekly basis or more, making it the most frequently visited location. More than 80% of the respondents stated that they visit the SFO area at least a few times a year.



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 for any purpose is the top reported travel mode, followed by using a ride-hailing service.





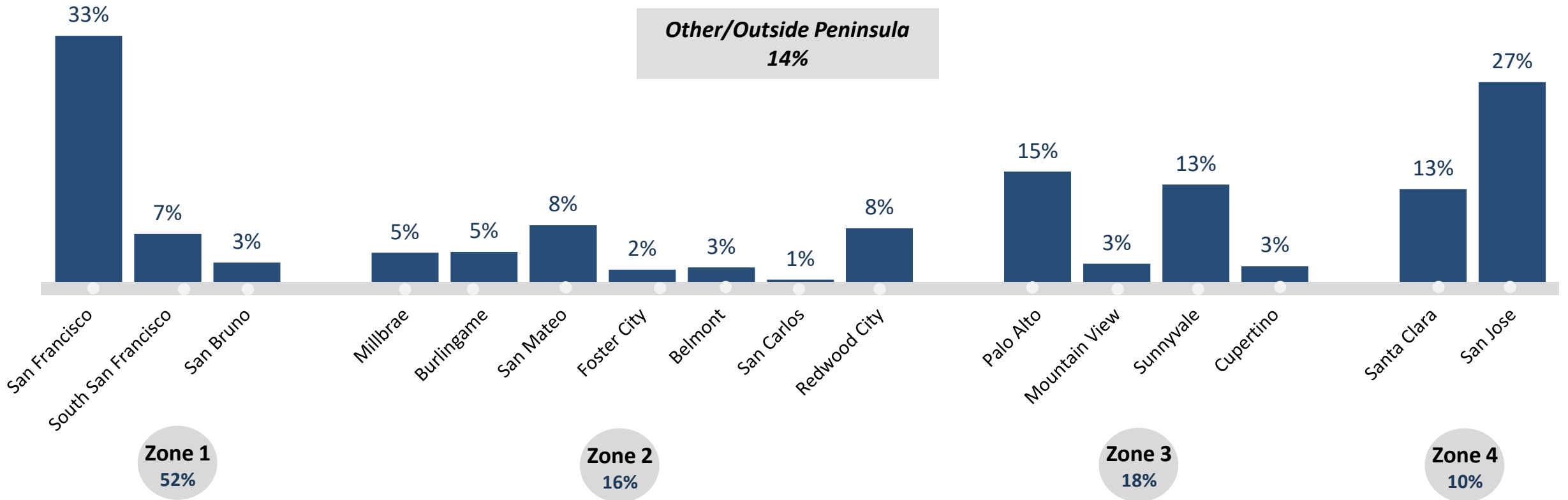
Commute Behavior

(Those who make physical commute trips; n=1,308)

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 (n=1,308)



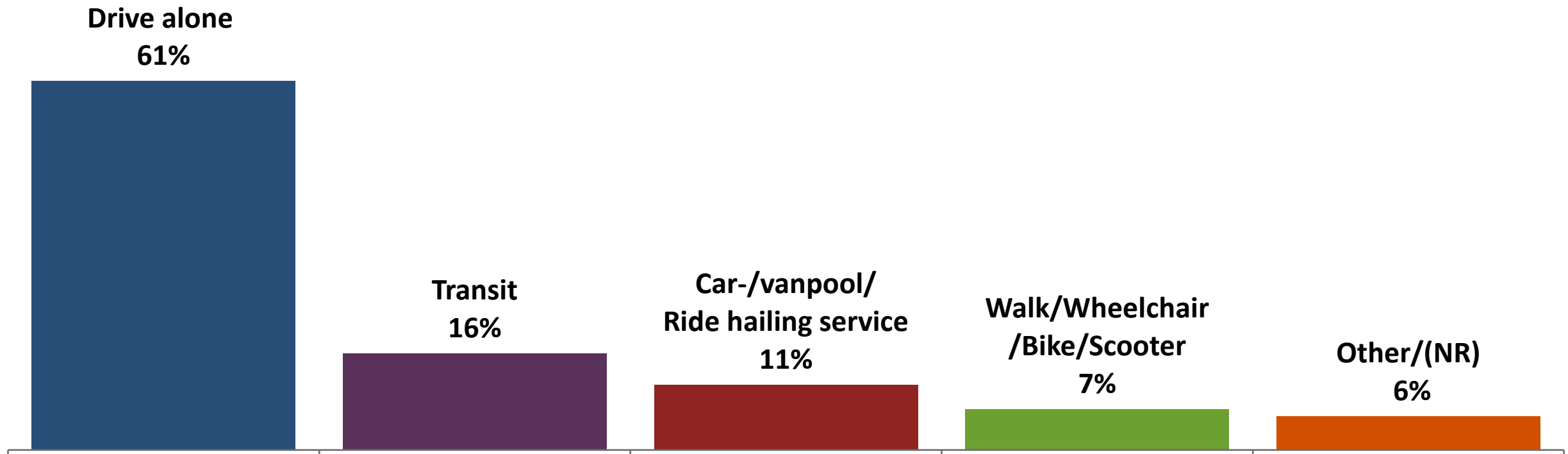
Q26. First, where is your typical commute destination? Please select all that apply. (Multi-response)

* Note: 14% of respondents indicated "Other" as their destination.

Commute Mode – Commuters

Among those who make physical commutes, driving and transit are the most commonly reported modes of travel.

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

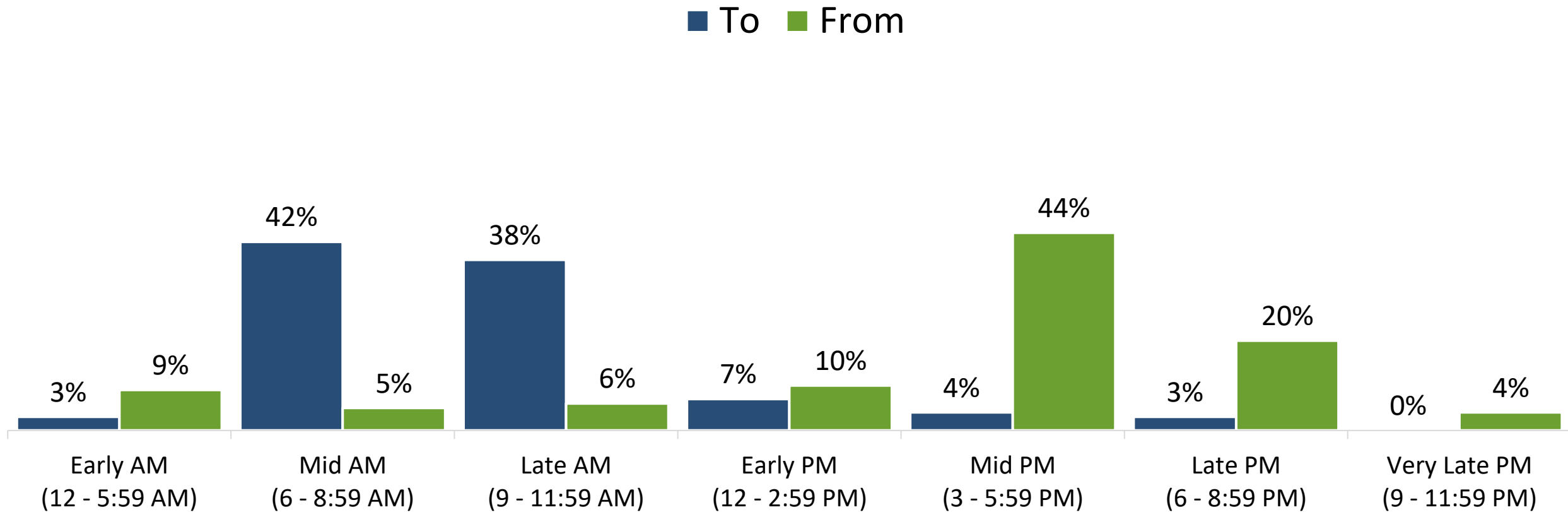


Q31. When you make trips to your typical commute location, how do you usually travel? If you use more than one mode, please select the one you use most often or for the longest distance of your trip.

Commute Times – Commuters

The majority of commuters leave for their commute destination in the mid or late morning, while the plurality of them return in the mid-afternoon.

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



Q28. What time of day do you usually travel to your typical commute destination?

Q29. What time of day do you usually leave your typical commute destination?

Commute Duration – Commuters

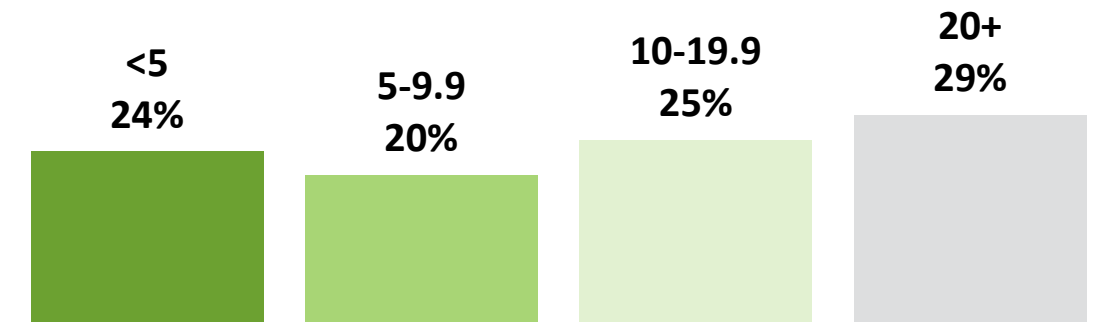
Although the plurality of those who make commutes report only traveling 15-29 miles away, almost one-third of them reported living 20 miles or more away from their typical commute destination.

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

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

Mean Number of Miles

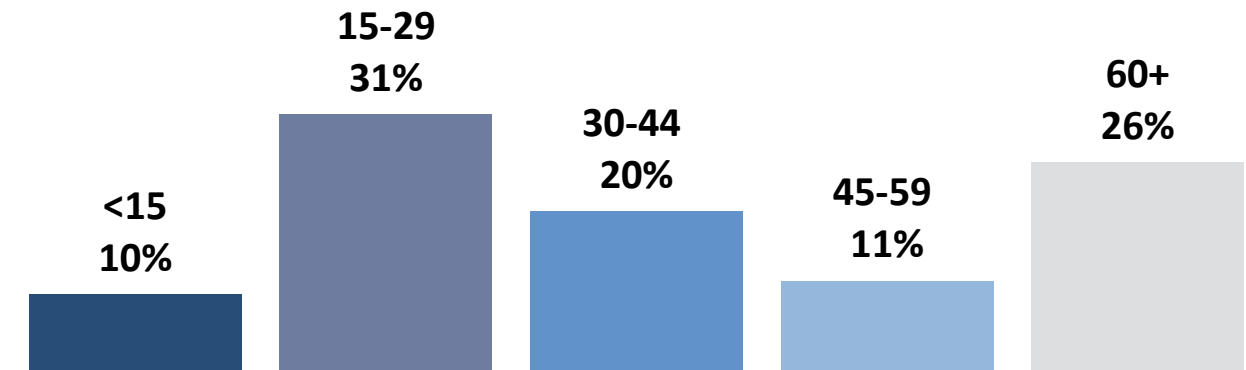
(Miles) 14.8 miles



About how long does that trip usually take you?

Mean Number of Minutes

(Minutes) 41.9 minutes





Caltrain Ridership

Caltrain Ridership Definition

Just over a third of the respondents reported 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.

% 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=145)

Occasional Riders

Currently rides Caltrain a few times a year, for any reason
(n=385)

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=150)

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=363)

Non-Riders

Never rode Caltrain on a regular basis at any point in the past, and currently never rides Caltrain, for any reason
(n=489)

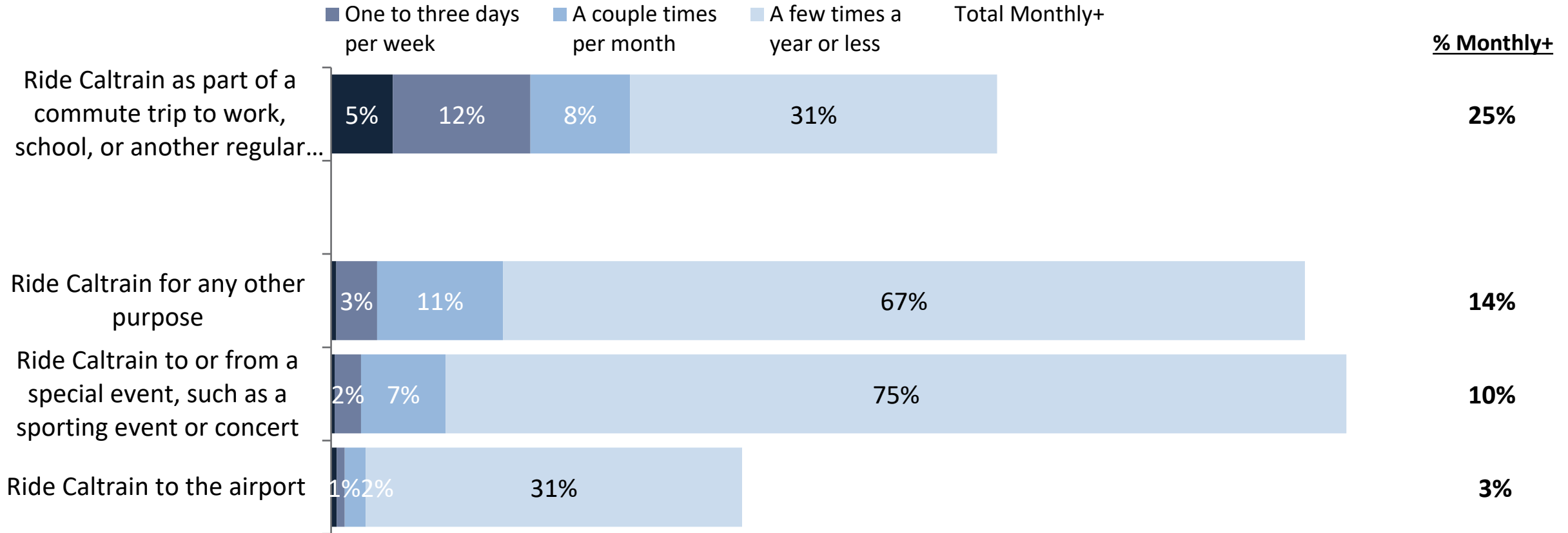
Q4-6. I'm going to read you a few statements about your transportation habits before the pandemic. Please tell me if you did each one more than once a week or less than once a week.

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.

Caltrain Trip Purpose – Reg. & Occ. Riders

A quarter of frequent and occasional Caltrain riders ride Caltrain as part of a commute trip to work, school, or another regular destination.

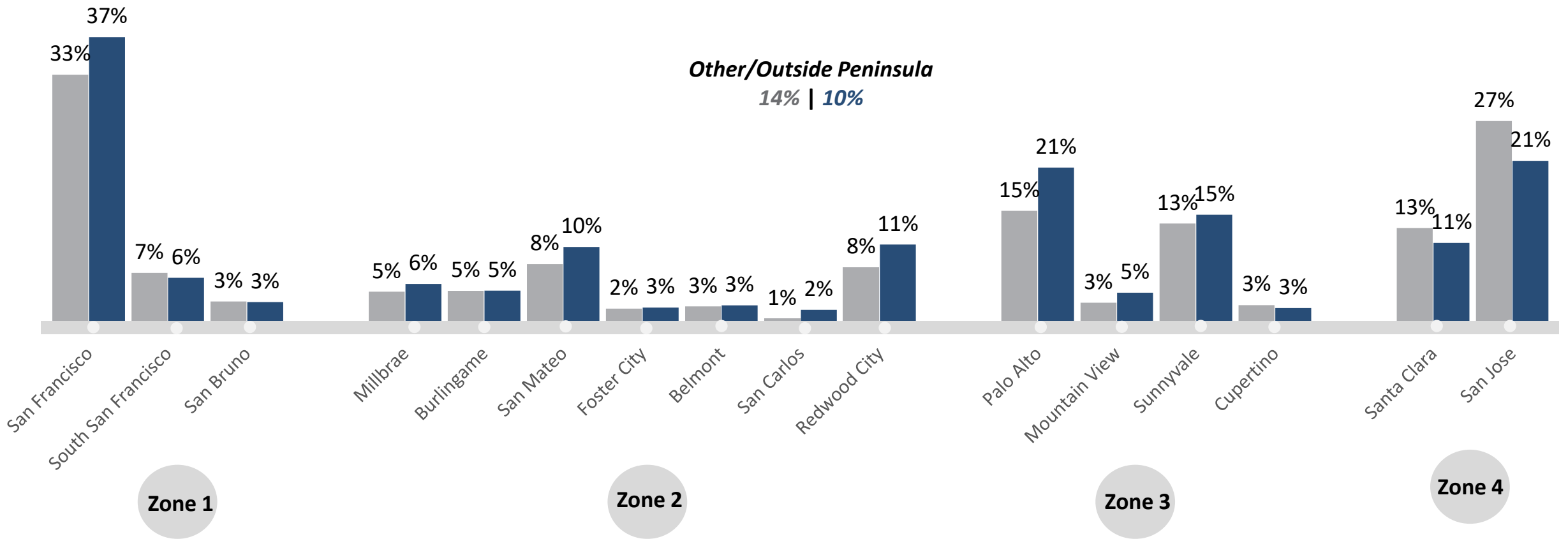
(Asked among respondents who ride Caltrain more than yearly, n=530)



Typical Destination – Reg. & Occ. Riders

Both frequent and occasional Caltrain riders most commonly report commuting to San Francisco and San Jose. Sizeable shares of both groups also travel to Palo Alto, Sunnyvale, and Santa Clara.

■ All Commuters (n=1,308) ■ Regular & Occasional Riders (35%) (n=530)



Q26. First, where is your typical commute destination? Please select all that apply.

* Note: 14% of commuters and 10% of frequent and occasional riders indicated "Other" as their destination.

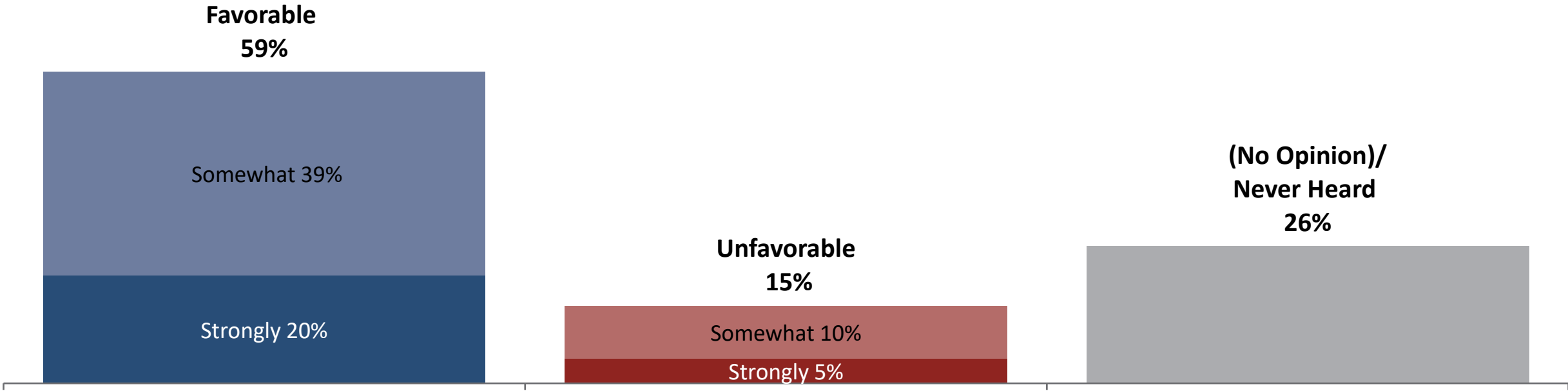


Caltrain Perceptions

Caltrain Favorable Rating – Overall

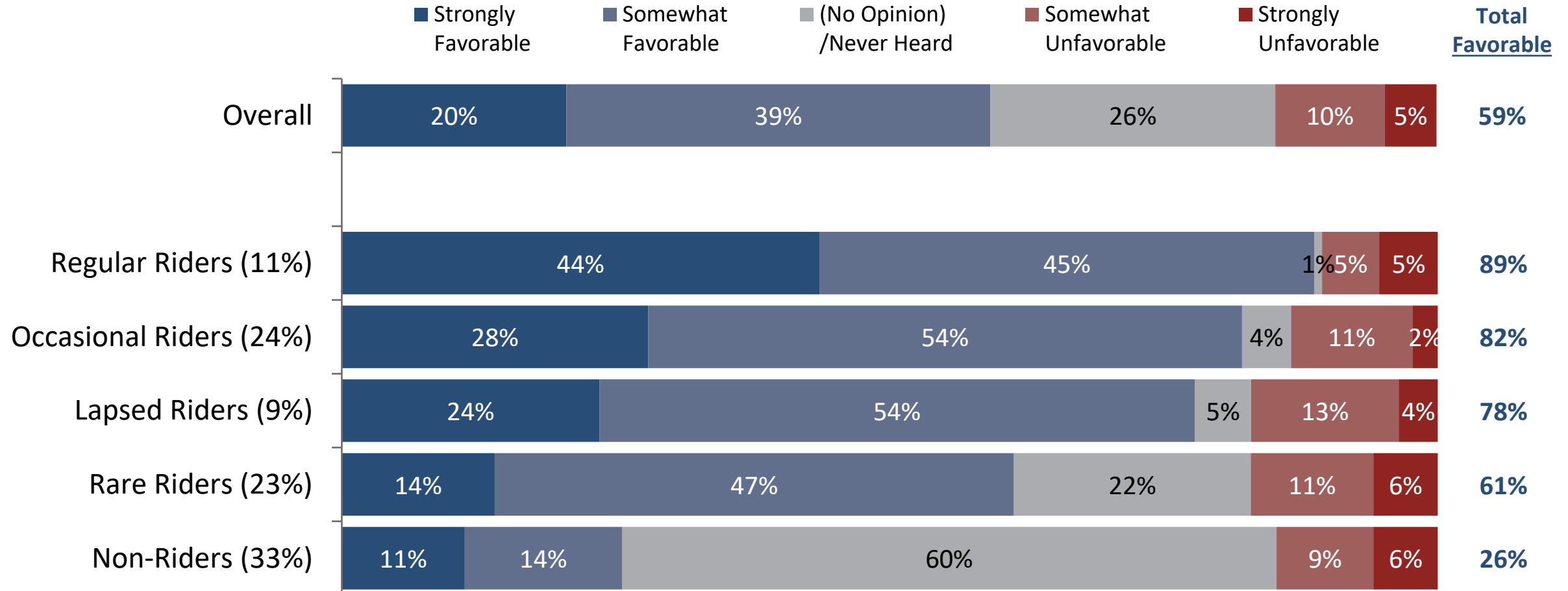
Regular and occasional riders – those who ride Caltrain at least a few times a year – are largely favorable of the Agency. Overall residents are generally favorable of Caltrain but have more neutral than negative perceptions; a quarter are unable to rate Caltrain one way or another.

All Residents



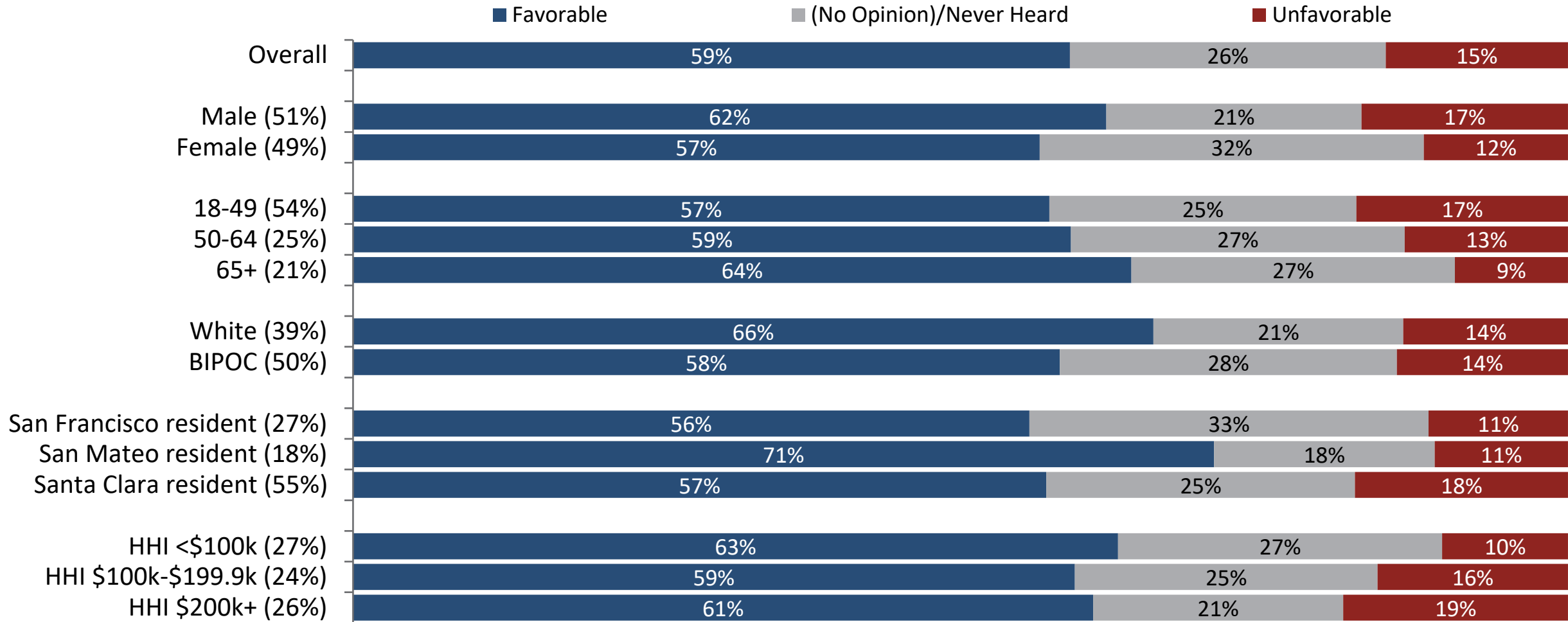
Caltrain Favorable Rating – Ridership

Regular riders – those who ride Caltrain monthly or more – have a stronger positive opinion of the Agency than less engaged audiences. A majority of non-riders have no opinion of the Agency, while negative sentiments are comparably low among all audiences.



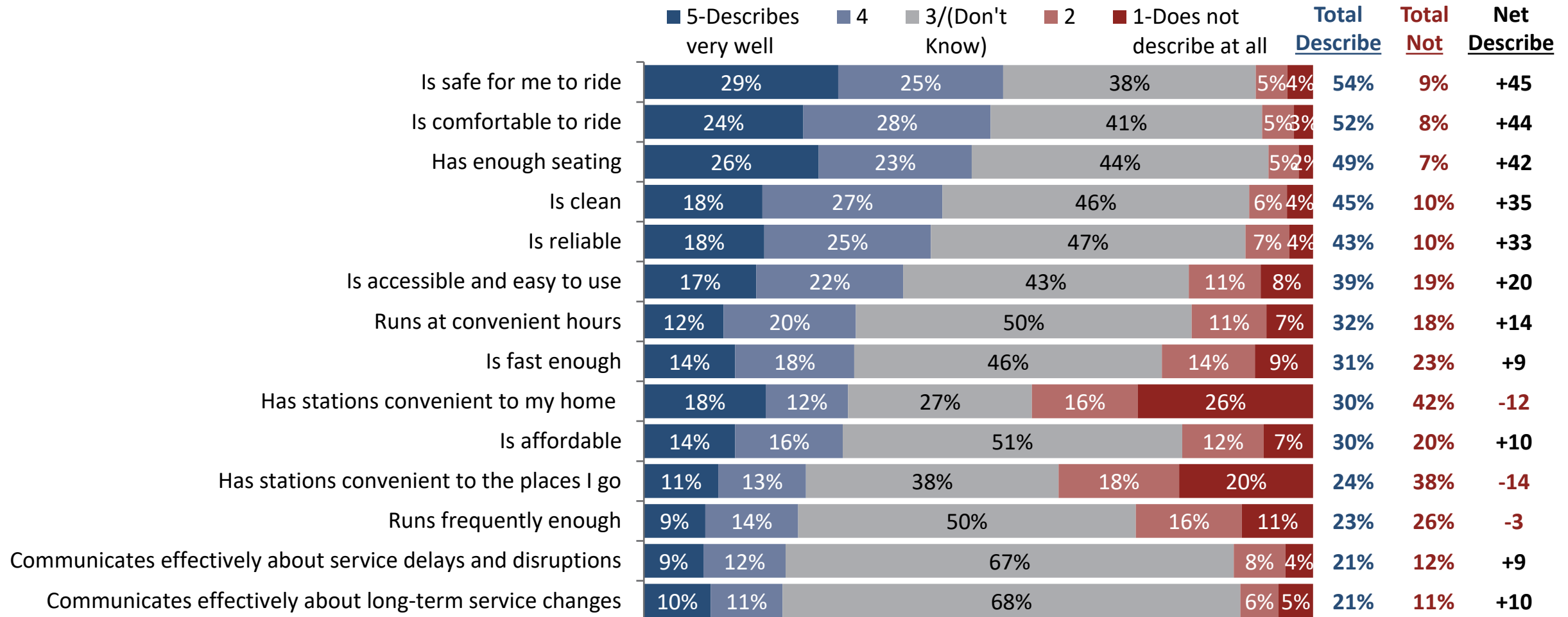
Caltrain Favorable Rating – Subgroups

Majorities rate Caltrain favorably across key demographic groups, with San Mateo County residents giving the Agency particularly high marks.



Caltrain Attributes - Overall

More than half of overall respondents described Caltrain as safe and comfortable. However, at least a quarter cite station locations and service frequency as pain points. Pluralities of residents are either neutral or unable to rate most aspects of Caltrain's service.

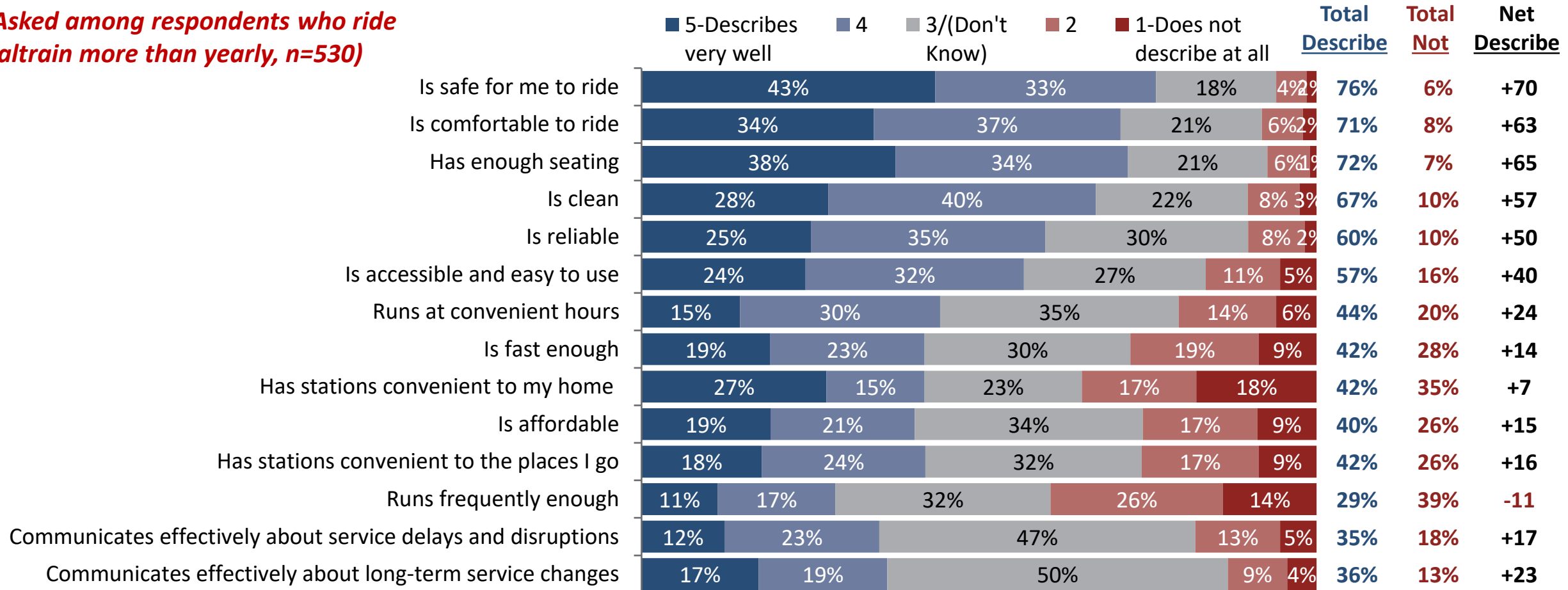


Q34-47. Based on what you may have experienced or heard regarding Caltrain, for each of the following phrases, please indicate how well you think that phrase describes Caltrain.

Caltrain Attributes – Reg. & Occ. Riders

Regular and occasional Caltrain riders largely consider the service safe, comfortable, clean and having sufficient seating, and majorities also believe it is reliable and easy to use. Caltrain riders would like to see improvements in service frequency.

(Asked among respondents who ride Caltrain more than yearly, n=530)

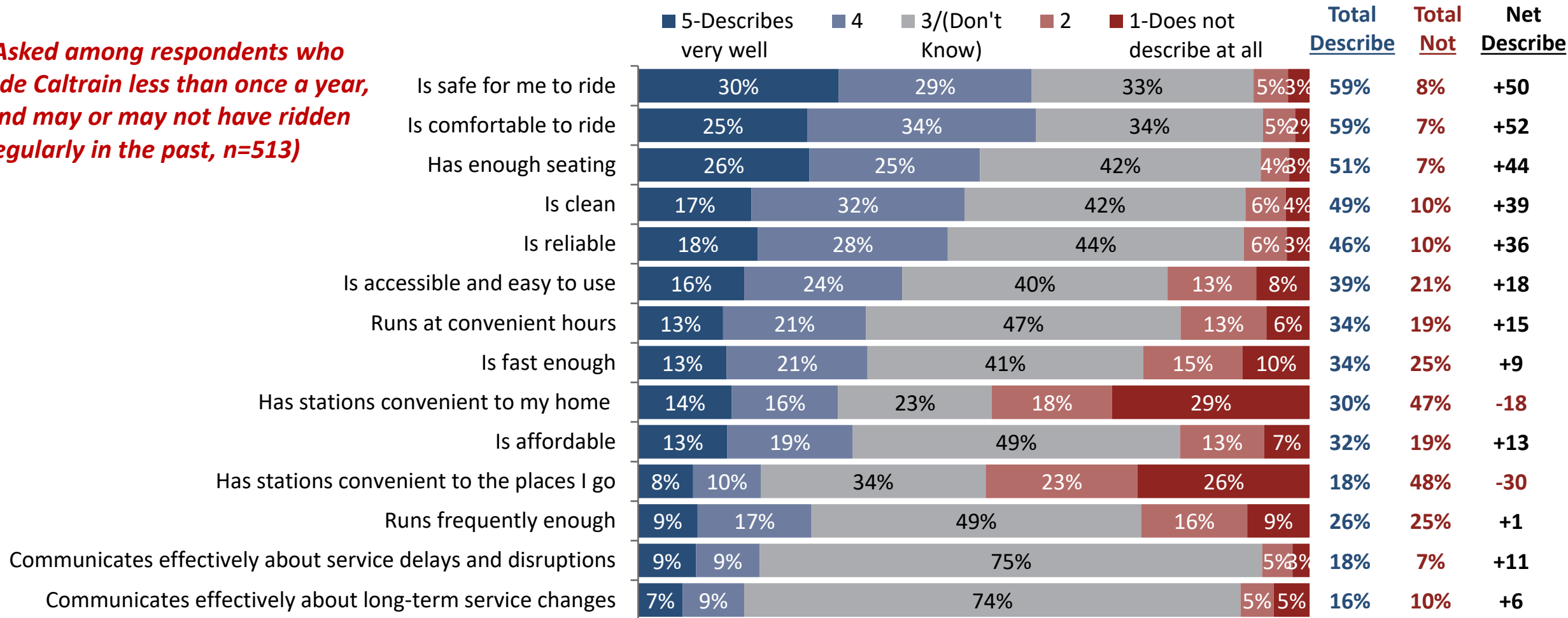


Q34-47. Based on what you may have experienced or heard regarding Caltrain, for each of the following phrases, please indicate how well you think that phrase describes Caltrain.

Caltrain Attributes – Rare & Lapsed Riders

Despite low awareness, most rare and lapsed riders perceive Caltrain as safe and comfortable to ride. For many rare and lapsed riders, station locations present a tangible challenge to ridership.

(Asked among respondents who ride Caltrain less than once a year, and may or may not have ridden regularly in the past, n=513)

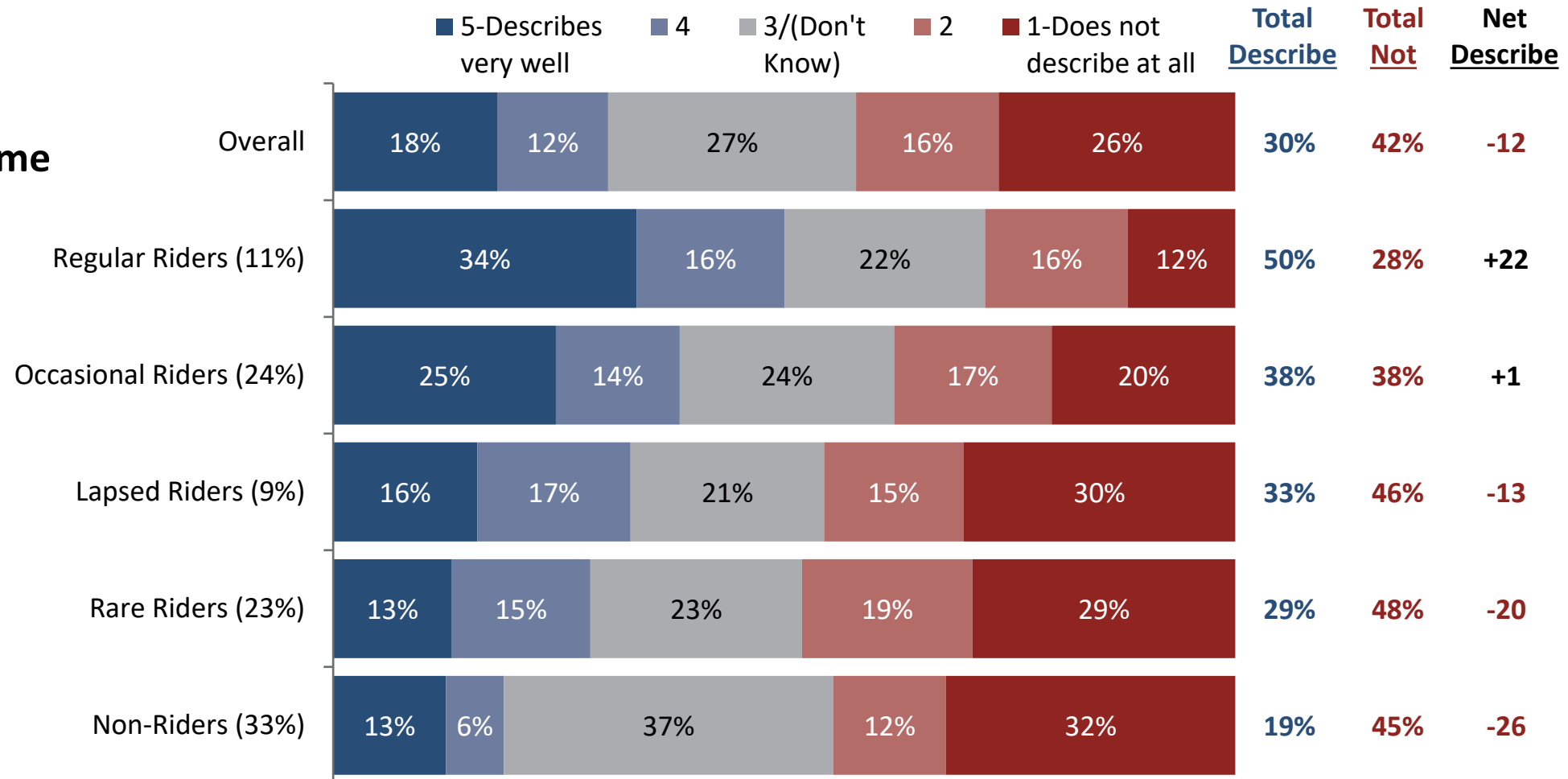


Q34-47. Based on what you may have experienced or heard regarding Caltrain, for each of the following phrases, please indicate how well you think that phrase describes Caltrain.

Caltrain Attributes – Stations Near Home

Among the respondents, only the regular rider segment had a majority indicating that Caltrain has stations convenient to their home.

Has stations convenient to my home

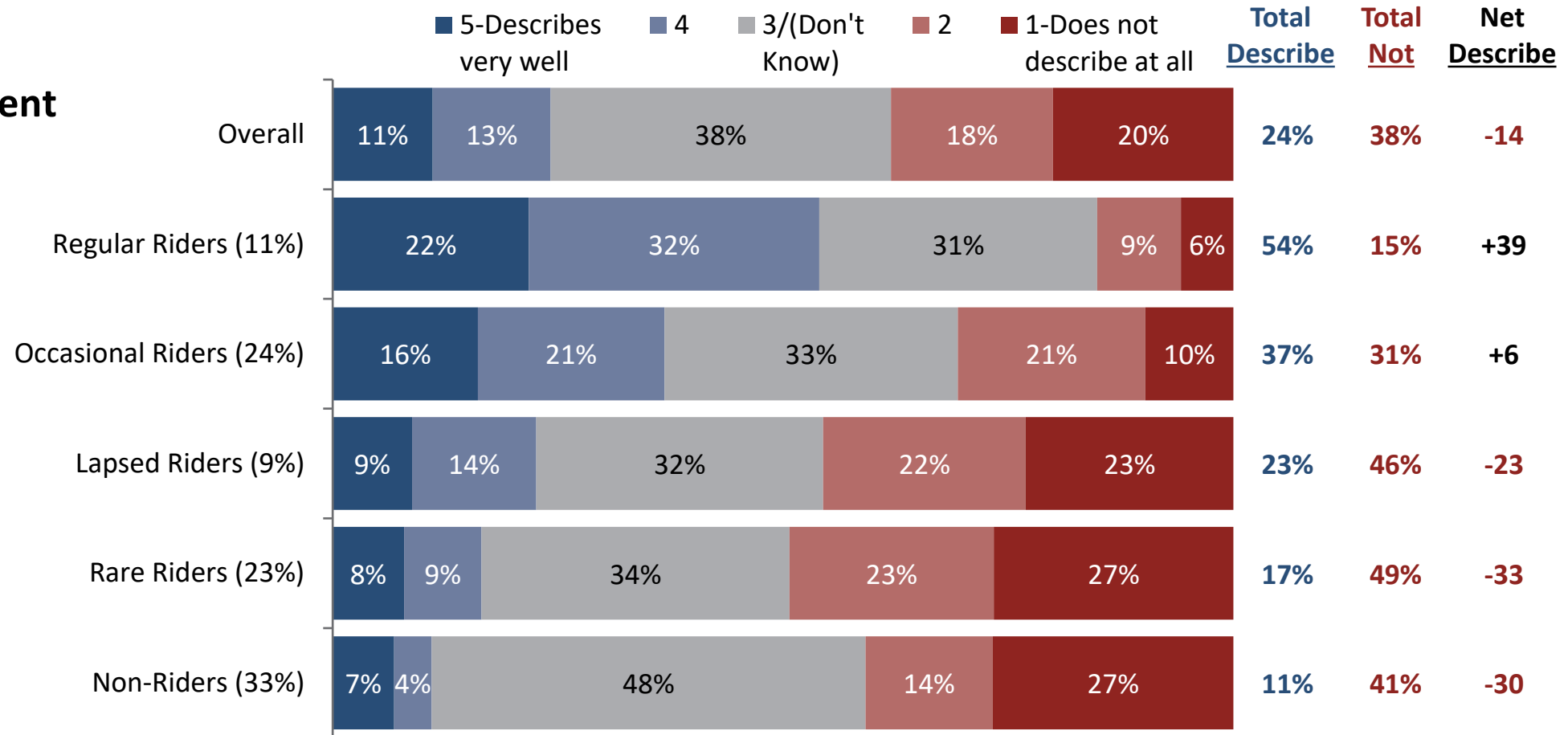


Q37. Based on what you may have experienced or heard regarding Caltrain, for each of the following phrases, please indicate how well you think that phrase describes Caltrain.

Caltrain Attributes – Stations Near Destination

Station location is strongly associated with ridership, with those who feel stations are most convenient to their destination also most likely to be regular riders.

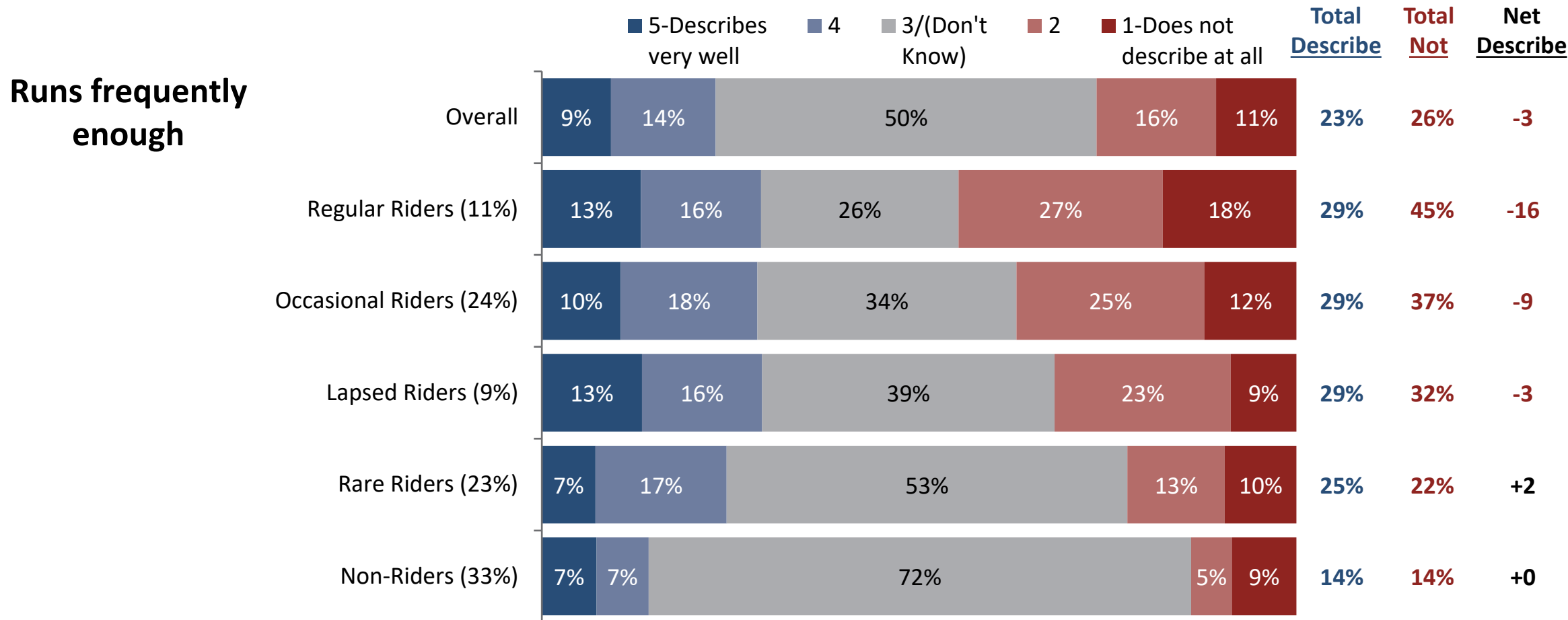
Has stations convenient to the places I go



Q34. 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 – Frequency

Residents are generally critical of the frequency of Caltrain, including pluralities of regular and occasional riders who are most engaged with the service.



Q39. 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

Top-of-Mind Barriers to Riding Caltrain

The top reasons mentioned by residents for not riding Caltrain are the routes not being convenient, considering it unnecessary, and lack of access to nearby stations.

Note: Showing responses 2% and greater

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

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

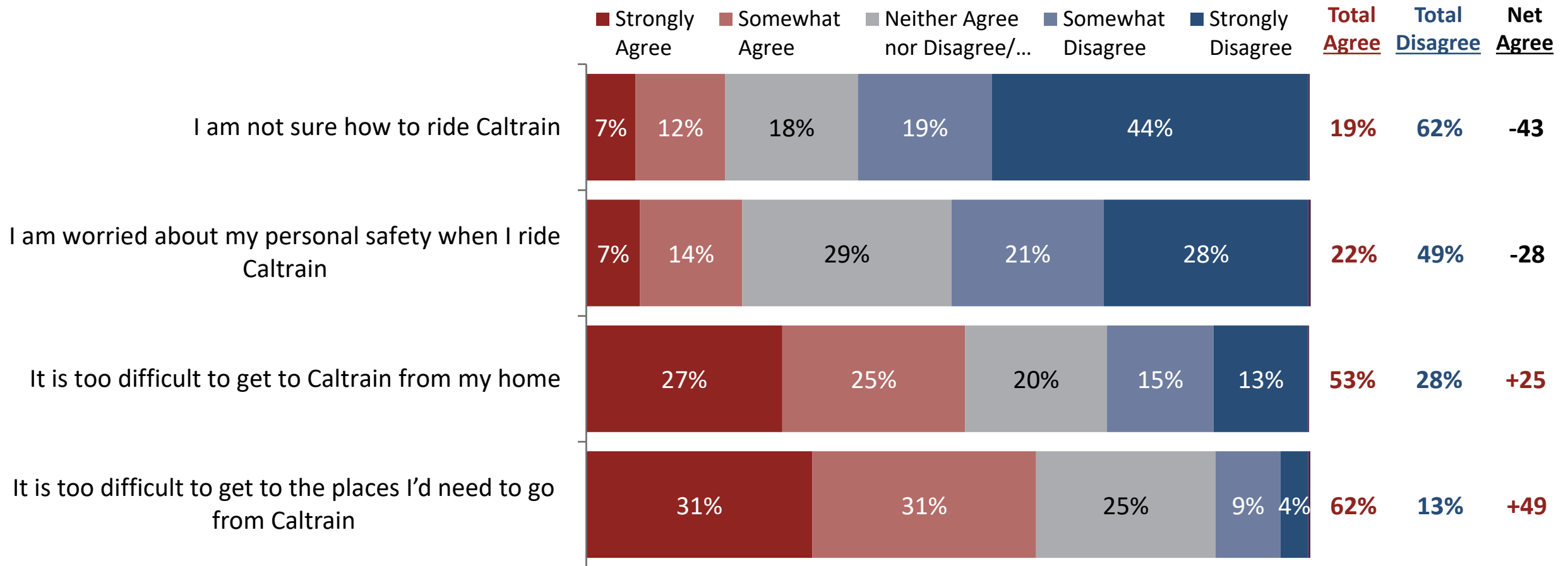
	Overall	Regular & Occasional Riders 35%	Rare & Lapsed Riders 32%	Non-Riders 33%
Routes/destinations	17%	14%	22%	16%
Not needed/necessary	13%	8%	12%	20%
Lack of access/no stations nearby	12%	10%	13%	13%
Schedule	9%	17%	7%	3%
Not convenient	7%	4%	7%	10%
Slow/takes too long	6%	8%	7%	5%
Cost	5%	7%	4%	4%
Have a car/prefer to drive	4%	2%	3%	6%
No longer commute/retired/work remotely	3%	4%	5%	1%
Transportation to/from station	2%	3%	2%	2%
Safety concerns/crime	2%	1%	1%	3%
Short commute/live near my destination	2%	1%	3%	1%
Other	10%	11%	8%	9%
Nothing	7%	8%	5%	6%
Don't know	1%	0%	0%	2%

Q33.

* Note MOE for subgroups: Freq. & Occ. Riders = 4.26, Rare & Lapsed Riders = 4.33, Non-Riders = 4.43.

Caltrain Barriers - Overall

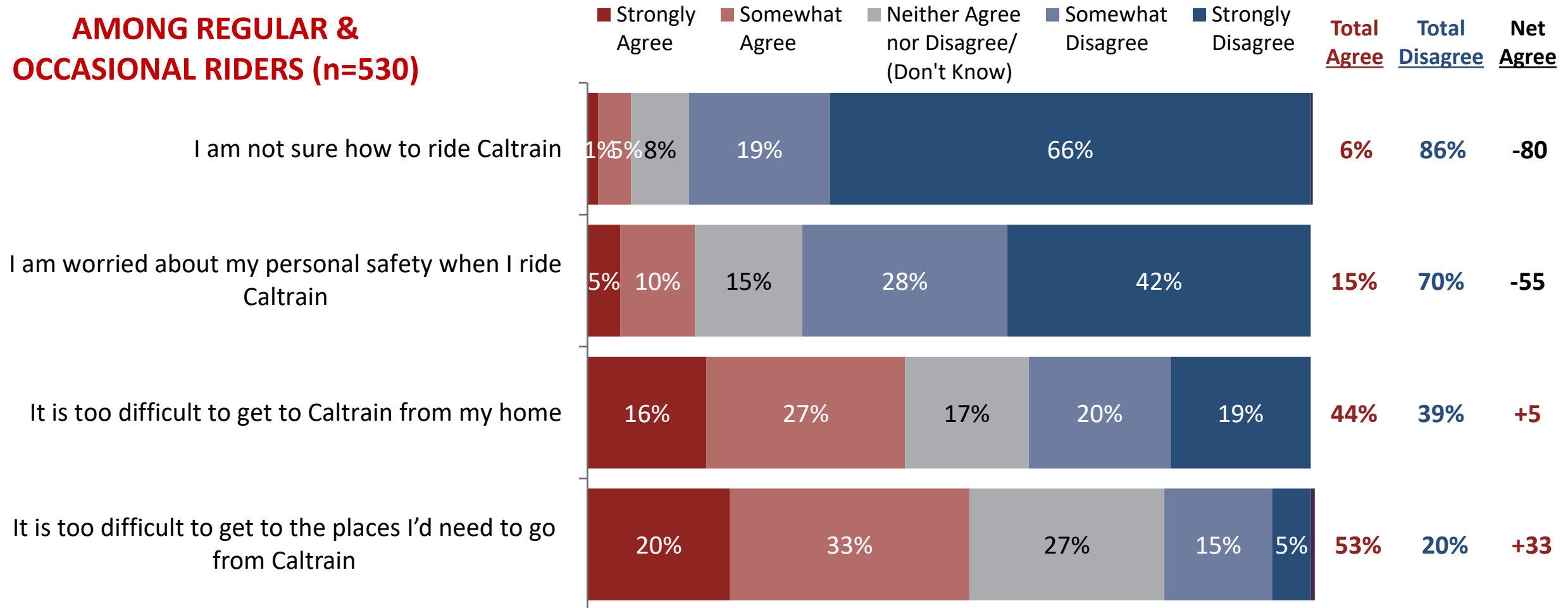
More than half of residents agree that it is too difficult reach either their home or destinations with Caltrain.



Caltrain Barriers – Regular & Occ. Riders

More than half of regular and occasional riders agree that it is too difficult to reach their destinations from Caltrain.

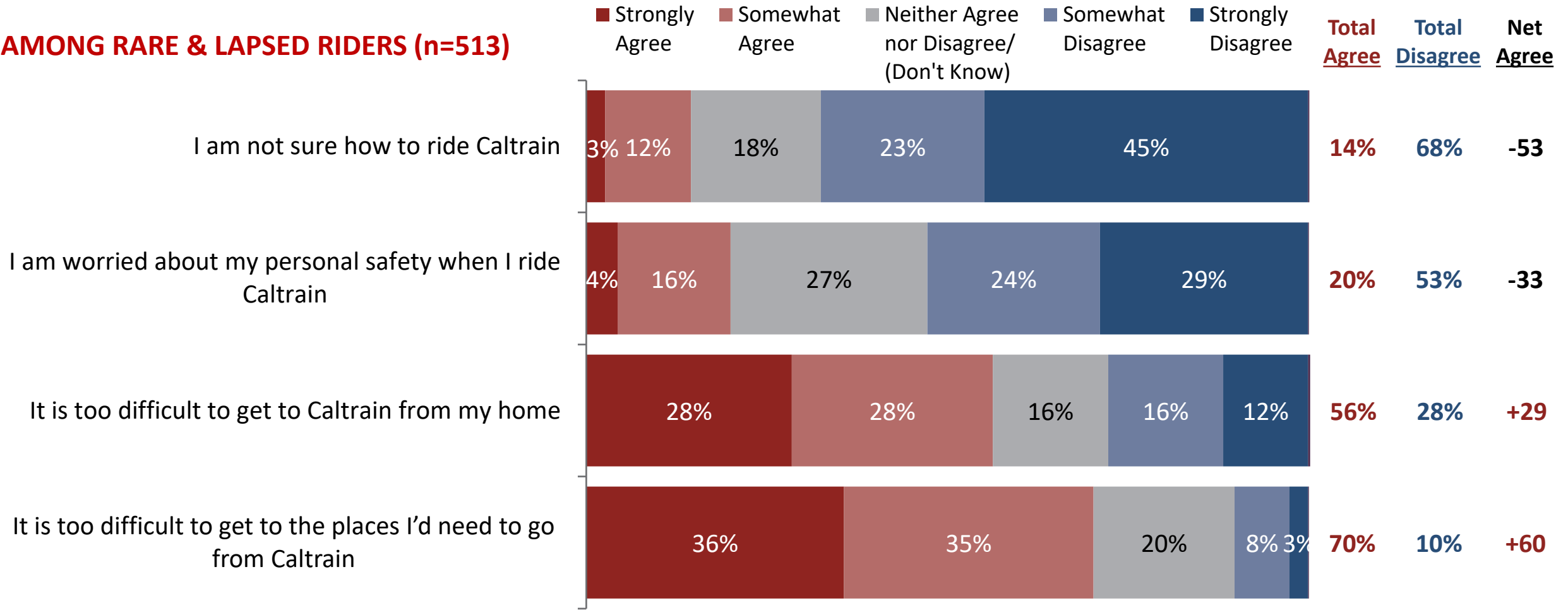
AMONG REGULAR & OCCASIONAL RIDERS (n=530)



Caltrain Barriers – Rare & Lapsed Riders

Among rare and lapsed riders, at least half believe getting to Caltrain is too difficult, and that nothing will replace their car as their main mode of transportation. Information and personal safety are not widely seen as barriers among these audiences.

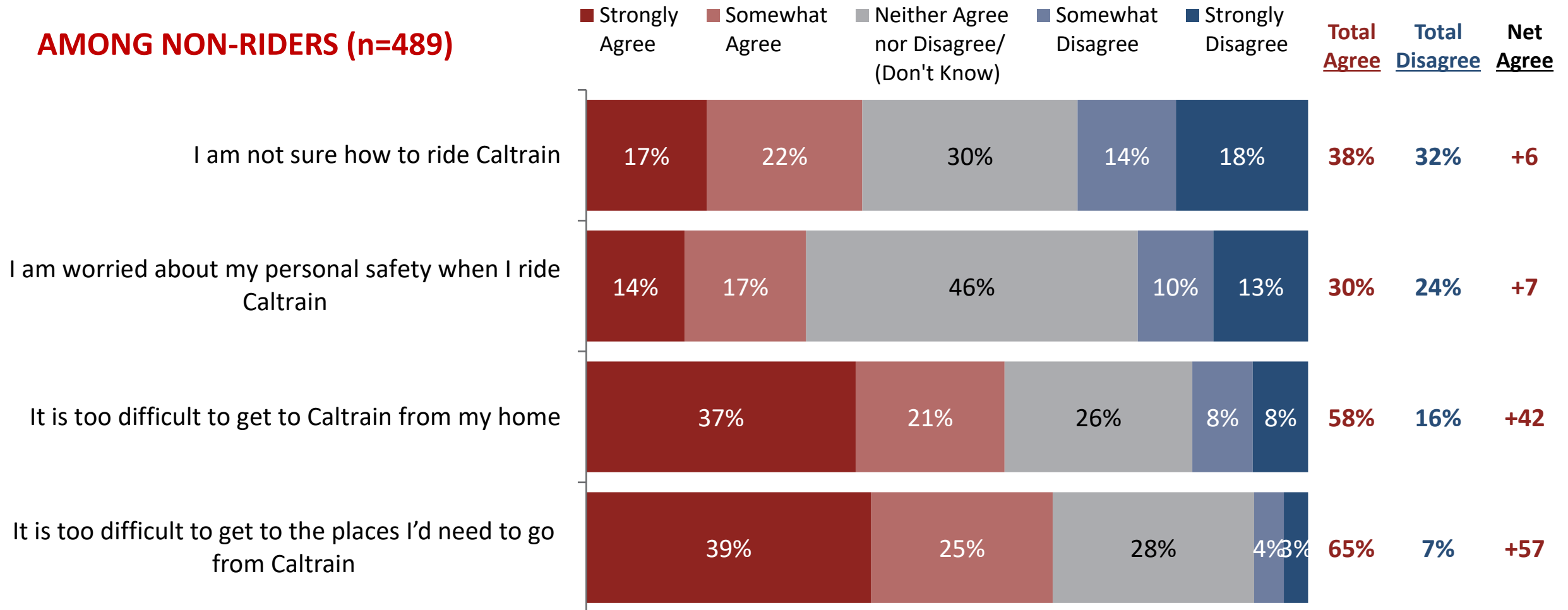
AMONG RARE & LAPSED RIDERS (n=513)



Caltrain Barriers – Non-Riders

Nearly two-thirds of non-riders agree believe it is too difficult to access Caltrain, either to/from home or their destinations.

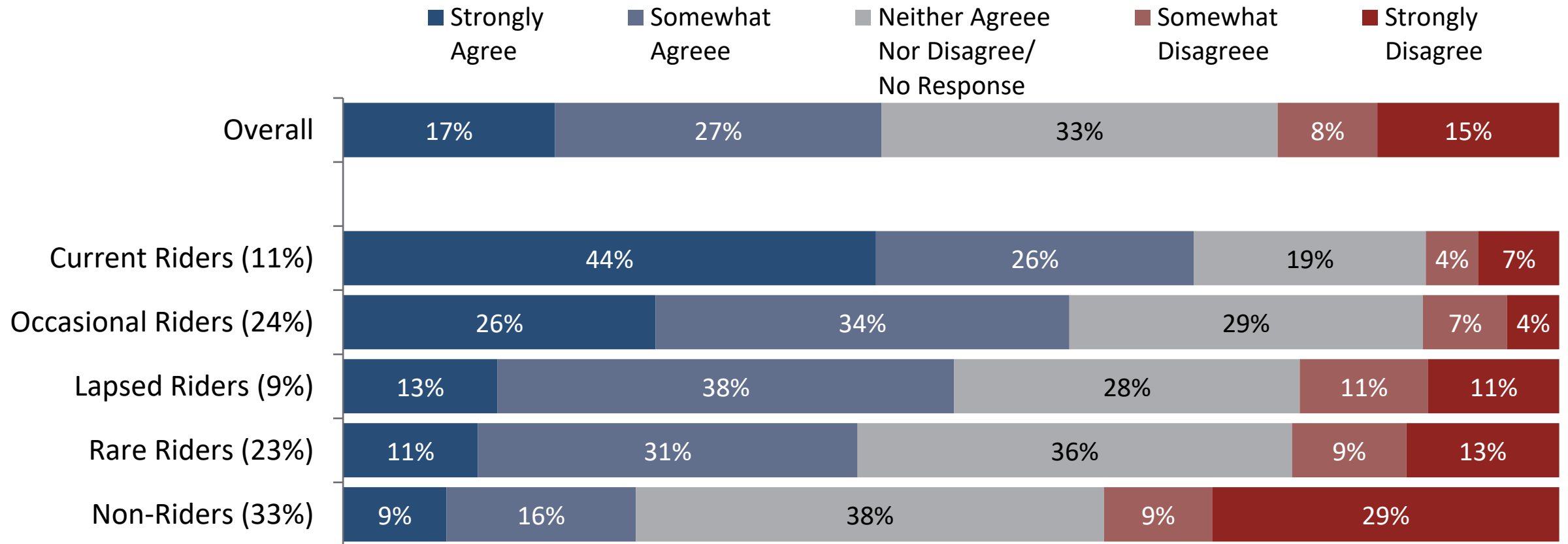
AMONG NON-RIDERS (n=489)



Caltrain Positive Attitudes

Just over four-in-ten respondents overall agree that they would prefer to ride Caltrain more often than they do now. Over half of frequent and occasional riders agree that they would prefer to ride Caltrain more often than they currently do.

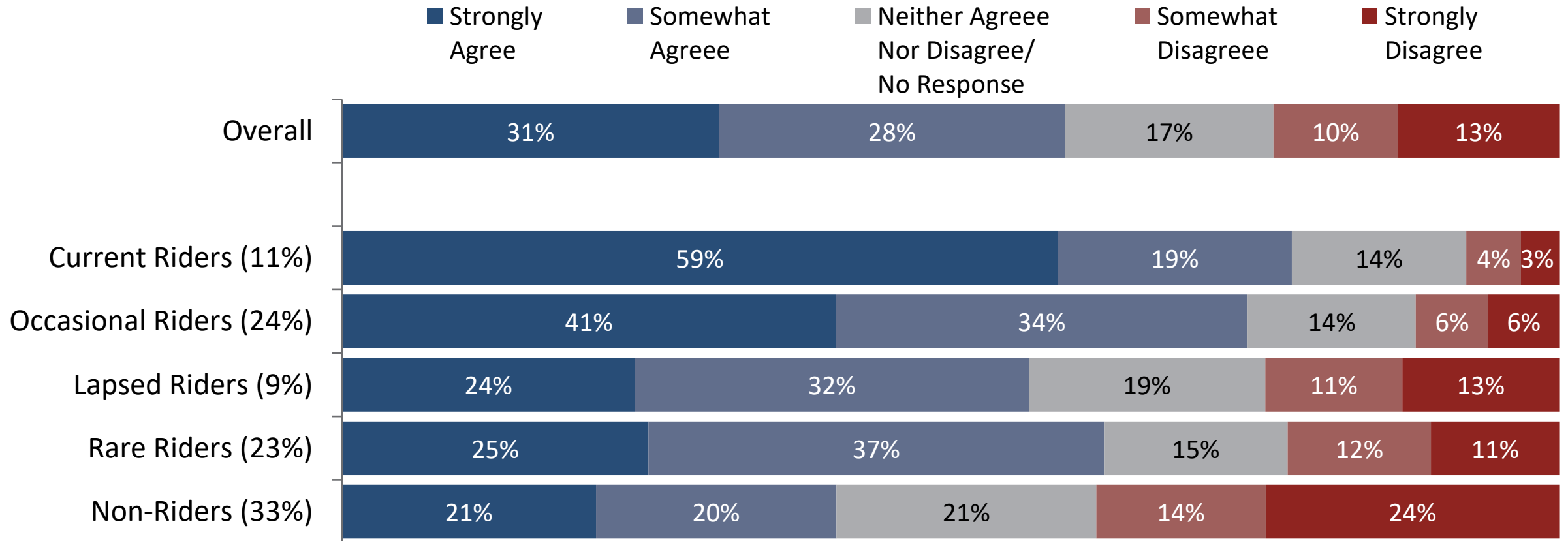
“I would prefer to ride Caltrain more often than I do now”



Caltrain Positive Attitudes

Despite the challenges expressed, residents are attitudinally in favor of using Caltrain over driving. A majority would prefer taking Caltrain over driving if it is a feasible option to reach their destination. These sentiments are largely shared between those who ride Caltrain in any capacity, as well as a large share of non-riders.

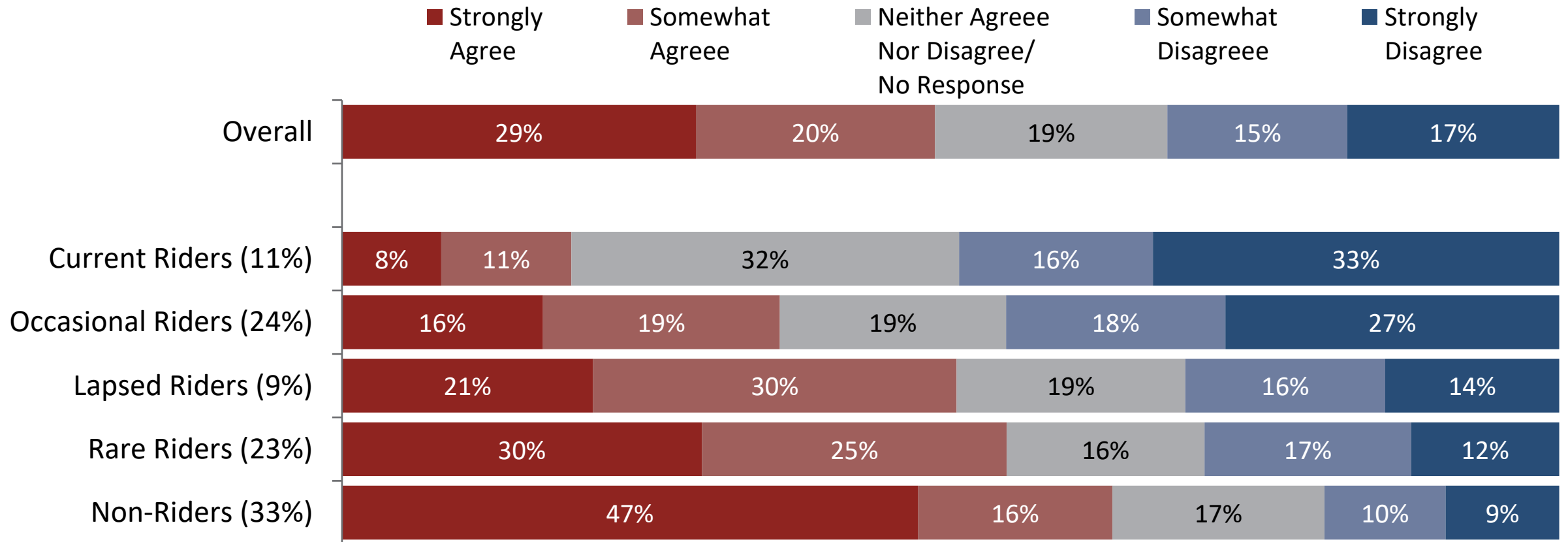
“If I can take Caltrain to get to my destination, I would rather do that than drive”



Caltrain Positive Attitudes

Those who are less engaged with Caltrain have a more tangible attachment to their cars, suggesting many of those who are open to riding Caltrain more often would likely use it to supplement – rather than replace – their personal vehicle usage.

“Nothing will replace my car as my main mode of transportation”



Top-of-Mind Ridership Incentives

The top changes mentioned by respondents that would increase ridership overall are having more stations, more frequent services, and more routes.

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

Note: Showing responses 2% and greater (Open-ended question; verbatim responses coded into categories shown)

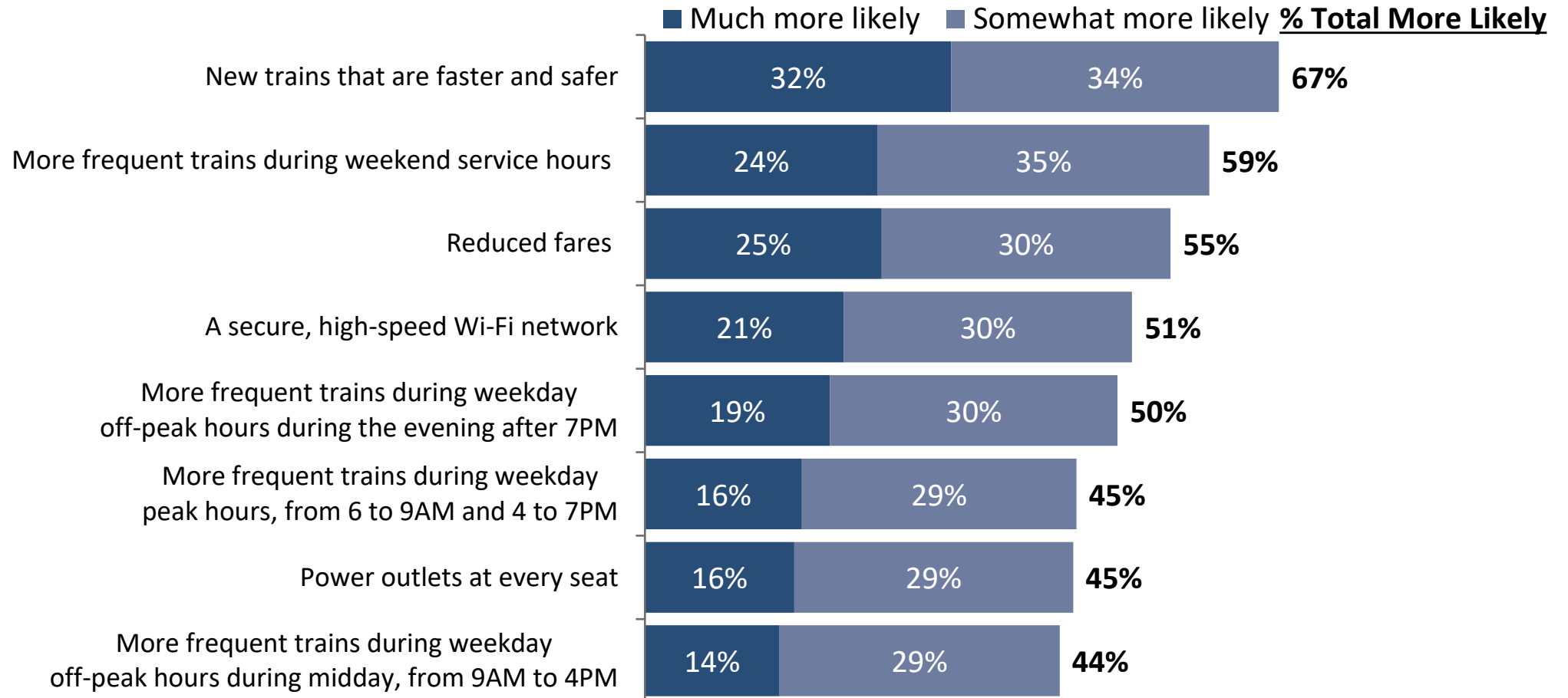
	Overall	Regular & Occasional Riders (35%)	Rare & Lapsed Riders (32%)	Non-Riders (33%)
More stations/closer stations	15%	9%	19%	18%
Schedules/more trains/frequent service	12%	22%	9%	5%
More routes/destinations	11%	10%	14%	10%
Personal circumstances	9%	6%	10%	11%
Lower cost/cheaper	7%	10%	4%	6%
Transportation to/from station	6%	7%	7%	3%
Faster/shorten travel time	5%	7%	6%	3%
Improve safety	3%	2%	2%	4%
Improve convenience/ease of use	2%	1%	2%	2%
Improve parking	1%	1%	1%	1%
Other	9%	12%	8%	5%
Nothing	16%	12%	15%	22%
Don't know	4%	1%	4%	8%

Q59.

* Note MOE for subgroups: Freq. & Occ. Riders = 4.26, Rare & Lapsed Riders = 4.33, Non-Riders = 4.43.

Ridership Incentives - Overall

Two-thirds of the respondents are more likely to ride Caltrain if they have access to new trains that are faster and safer. Additionally, over half of the respondents indicated that more frequent weekend train services, reduced fares, and a secure high-speed Wi-Fi network would make them more likely to ride Caltrain.



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.

Ridership Incentives – Rider Breakdown

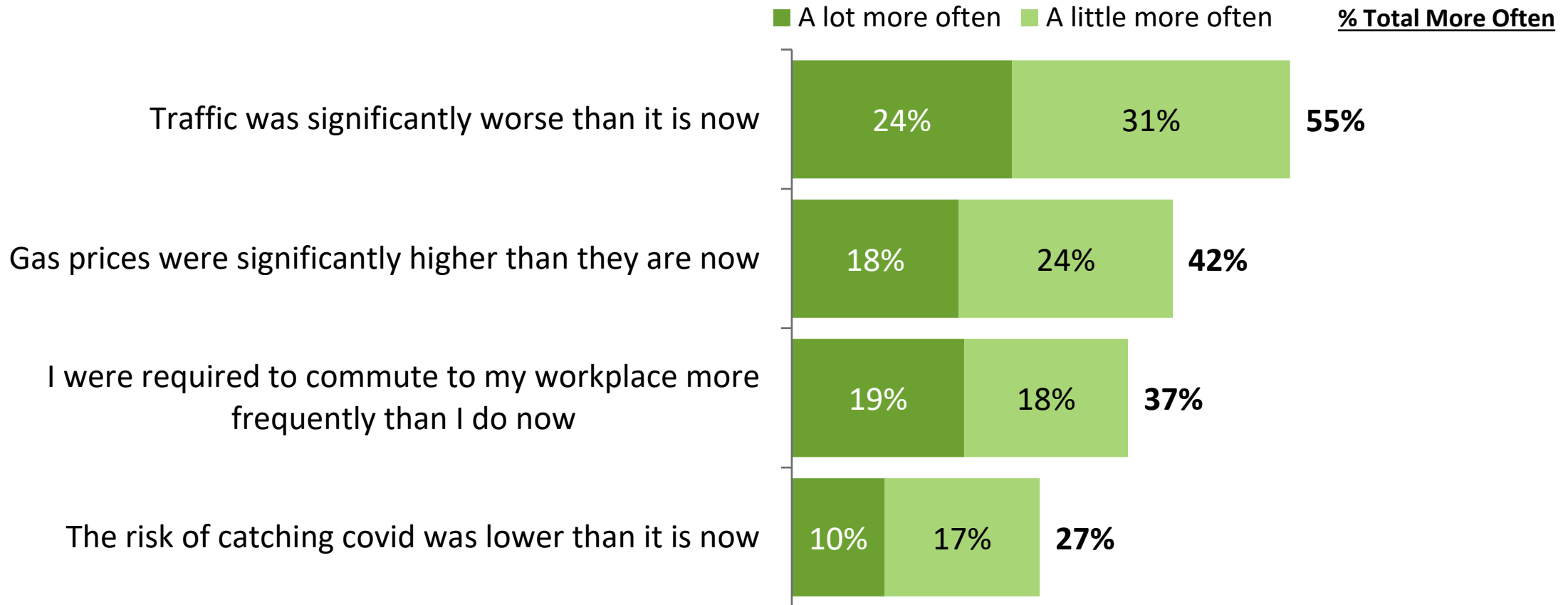
The changes that would have the greatest impact on increasing ridership include new trains, more frequent weekend train services, and reduced fares. Those already engaged with the service (regular and occasional riders) respond well to all of the changes tested.

	% Total More Likely			
	Overall	Regular & Occasional Riders (35%)	Rare & Lapsed Riders (32%)	Non-Riders (33%)
New trains that are faster and safer	67%	83%	66%	50%
More frequent trains during weekend service hours	59%	74%	61%	41%
Reduced fares	55%	69%	53%	42%
A secure, high-speed Wi-Fi network	51%	65%	51%	36%
More frequent trains during weekday off-peak hours during the evening after 7PM	50%	69%	49%	29%
More frequent trains during weekday peak hours, from 6 to 9AM and 4 to 7PM	45%	60%	41%	33%
Power outlets at every seat	45%	54%	45%	35%
More frequent trains during weekday off-peak hours during midday, from 9AM to 4PM	44%	58%	42%	30%

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.

Future Ridership Factors - Overall

More than half of the respondents reported that they would ride Caltrain "a lot" or "a little" more often if traffic significantly worsens.



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.

Caltrain Ridership Factors - Riders

Among the factors tested, traffic and gas prices are the primary reasons why respondents would ride Caltrain more often.

	% Total More Often			
	Overall	Regular & Occasional Riders (35%)	Rare & Lapsed Riders (32%)	Non-Riders (33%)
Traffic was significantly worse than it is now	55%	66%	56%	42%
Gas prices were significantly higher than they are now	42%	54%	40%	31%
I were required to commute to my workplace more frequently than I do now	37%	52%	31%	28%
The risk of catching covid was lower than it is now	27%	32%	26%	23%

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.

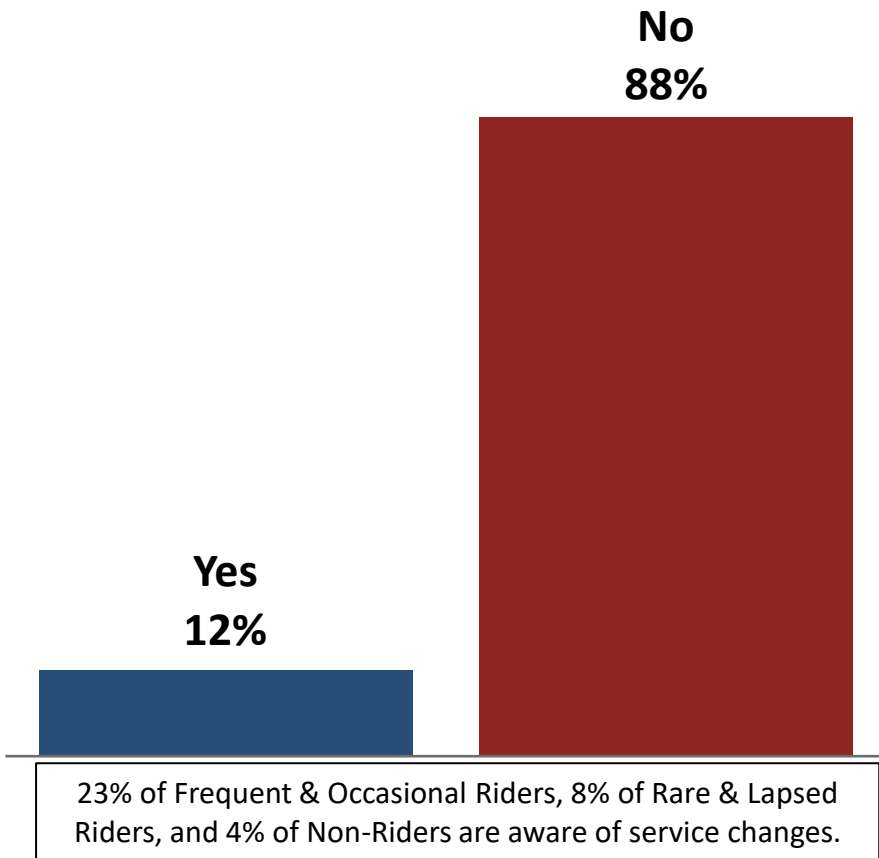


Information Sources

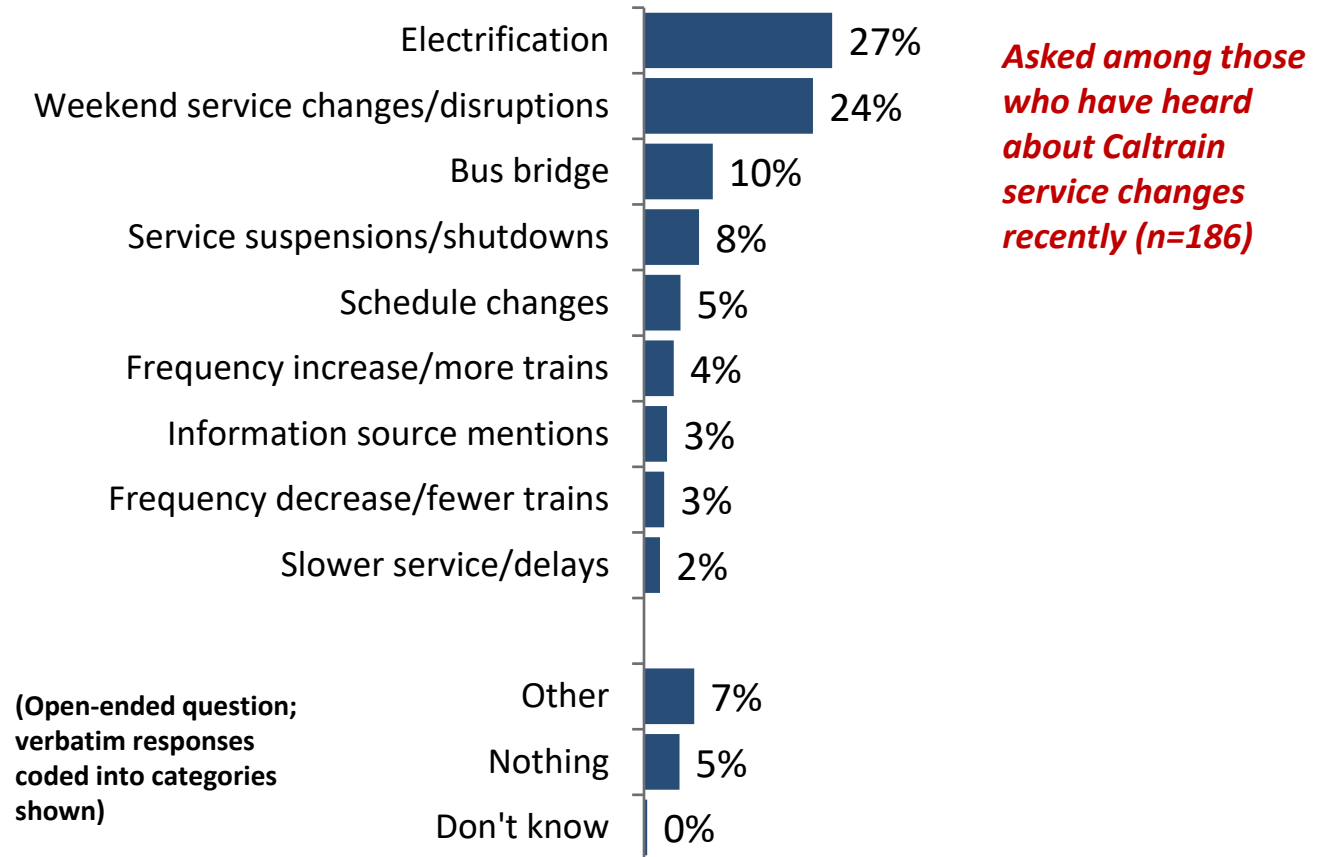
Caltrain Service Changes Awareness

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?



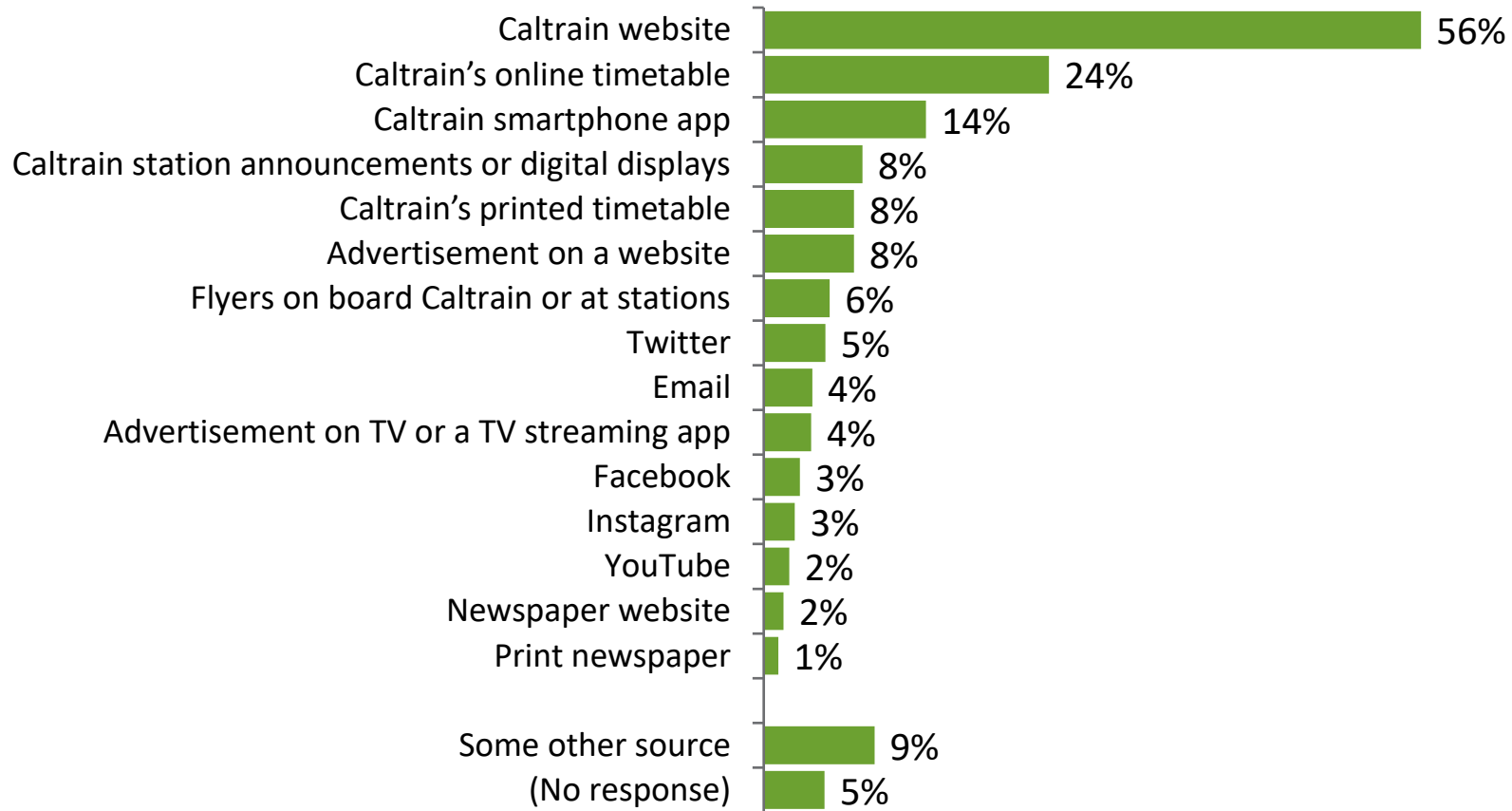
What have you heard about Caltrain service changes recently?



Caltrain Information Sources

The Caltrain website is by far the most mentioned source 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)



Demographic Profile

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

Conclusions

- ▶ Caltrain is viewed widely positively among riders and non-riders alike, but there are areas for improvement to increase ridership and make it a more attractive travel option.
- ▶ Most residents are attitudinally open to riding Caltrain more often and trends towards physical commuting may present opportunities for increasing ridership. However, most continue to rely on driving alone and are unlikely to give up driving as their primary travel mode.
- ▶ For those who currently ride Caltrain either regularly or occasionally, service frequency is the most significant challenge to increased ridership. Meanwhile, station locations is a tangible barrier for less engaged riders and non-riders. Personal safety and information-related barriers are comparatively minimal for all audiences.
- ▶ Increasing the frequency of service, particularly on weekends, and adding new trains and routes could have tangible impacts on increasing ridership, particularly among those who currently ride Caltrain at least occasionally but are interested in increasing their usage.
- ▶ Communication regarding service disruptions for improvements is failing to penetrate with either the general population or Caltrain riders. Their awareness and perceptions should strengthen the more they hear about improved service frequency and the new trains.



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