

# ***2025 Triennial Customer Survey***

**JPB TOPS Committee Meeting  
April 29, 2026**



# Survey Purpose & Methodology

## Caltrain Rider Snapshot

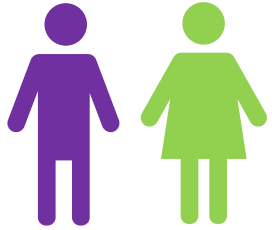
The 2025 Caltrain Triennial Survey provides a snapshot of the rider experience since 2022, including **who our customers are** and **how they use Caltrain**.

| Fieldwork Details  | Sampling Design   | Questionnaire  |
|--|---|--|
| <b>Dates</b> <ul style="list-style-type: none"><li>10/14/25 – 11/13/25</li></ul> <b>Sample size</b> <ul style="list-style-type: none"><li>3,622 completed</li></ul> <b>Margin of Error</b> <ul style="list-style-type: none"><li>1.47%</li></ul> | <b>Statistically Representative Random Sampling across:</b> <ul style="list-style-type: none"><li>Northbound + Southbound trains</li><li>Express</li><li>Limited</li><li>Local</li><li>South County Connector</li><li>Weekend local</li></ul> | <ul style="list-style-type: none"><li><b>Rider characteristics</b> (tenure, frequency)</li><li><b>Trip characteristics</b> (mode access/egress, station boarding/departure)</li><li><b>Demographics</b> (age, ethnicity, income)</li></ul> |

# Executive Summary

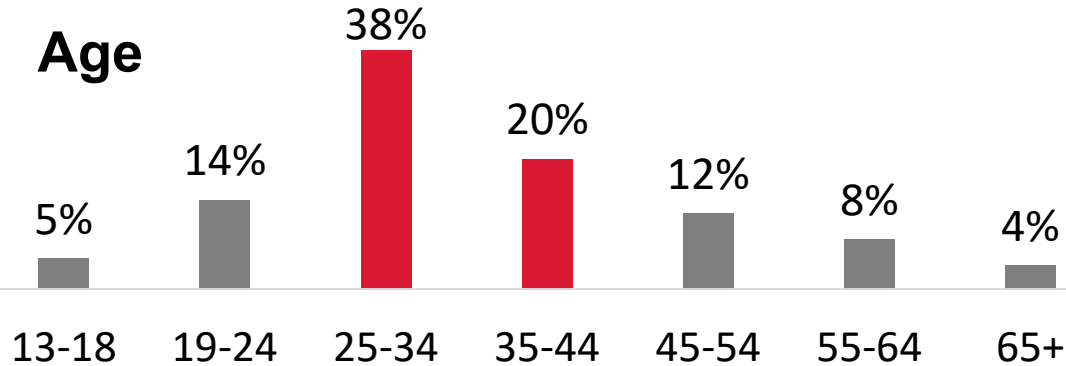
- Continued high customer satisfaction (4.5 of out 5)
- Riders: younger, 1/3 riding system less than 1 year; mix high and low-incomes using the system
- Primary use: work/commute trips
- Hybrid schedules: ~2–3 average days per week
- Clipper main payment method
- Growth driven by new riders and SF trips

# Who is Riding? Demographics



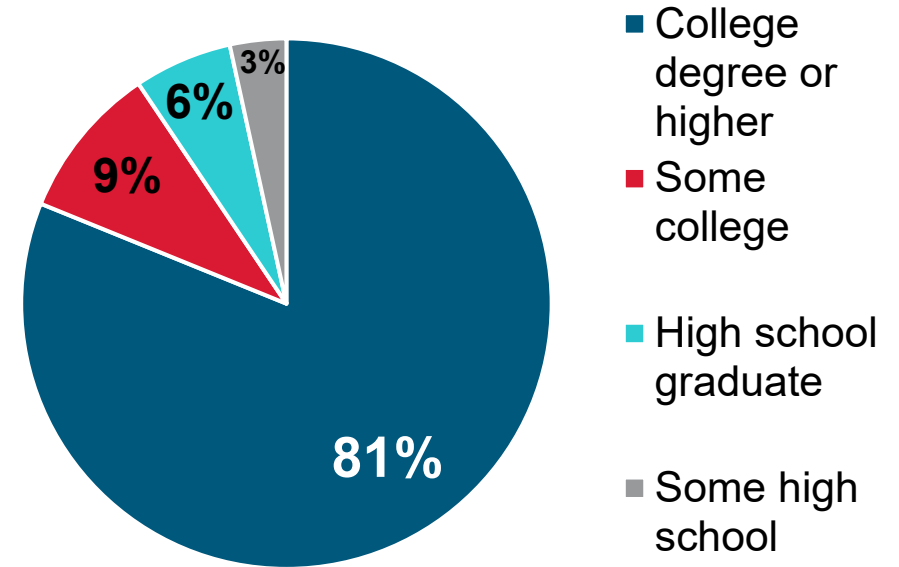
56% / 42%

## Age

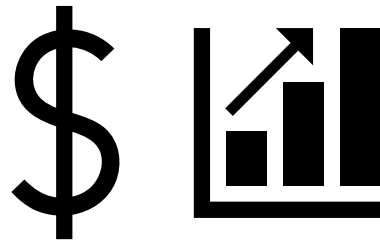


## Education

81% hold a college degree



Average Income \$171k – up 15%



## Key Insights

- Fare strategy must balance revenue goals with affordability needs
- Many riders with access to a car still choose Caltrain over of driving

# Demographics Continued

## Caltrain serves both core workers and low-income riders

- 1 in 3 riders are low-income (37%)\*
  - Ride more frequently (4x week vs. 3x week)
  - Less access to a car (55% vs 75%)
- 67% of trips are work-related → critical for daily mobility

### Key Insight

- Fare policy and service planning should reflect the needs of both commuter and low-income riders

| Income Category                      | Percent    |
|--------------------------------------|------------|
| Extremely Low Income                 | 10%        |
| Very Low Income                      | 10%        |
| Low Income                           | 17%        |
| Median                               | 6%         |
| Moderate                             | 6%         |
| Above moderate                       | 50%        |
| Total                                | 100%       |
| <b>Caltrain Low Income Ridership</b> | <b>37%</b> |

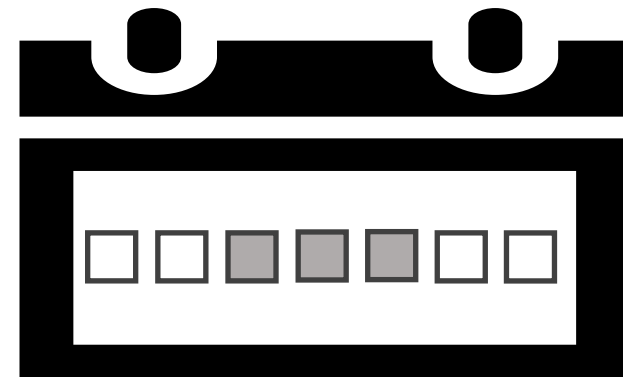
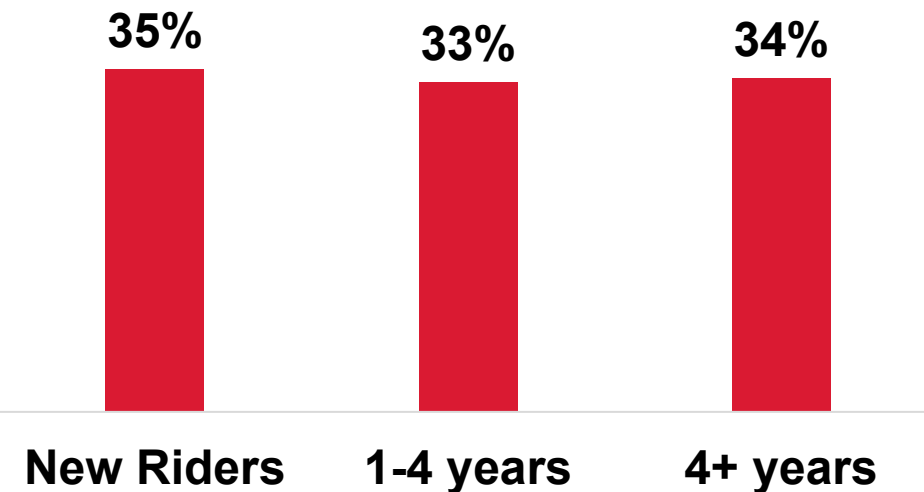
\*[As defined by State income limits by CA county](#)



# Hybrid Commute Patterns Drive Ridership

Strong influx of new riders – 1 in 3 are new to Caltrain

Most riders use Caltrain 2–3 times weekly, stable since 2022 but below 2019

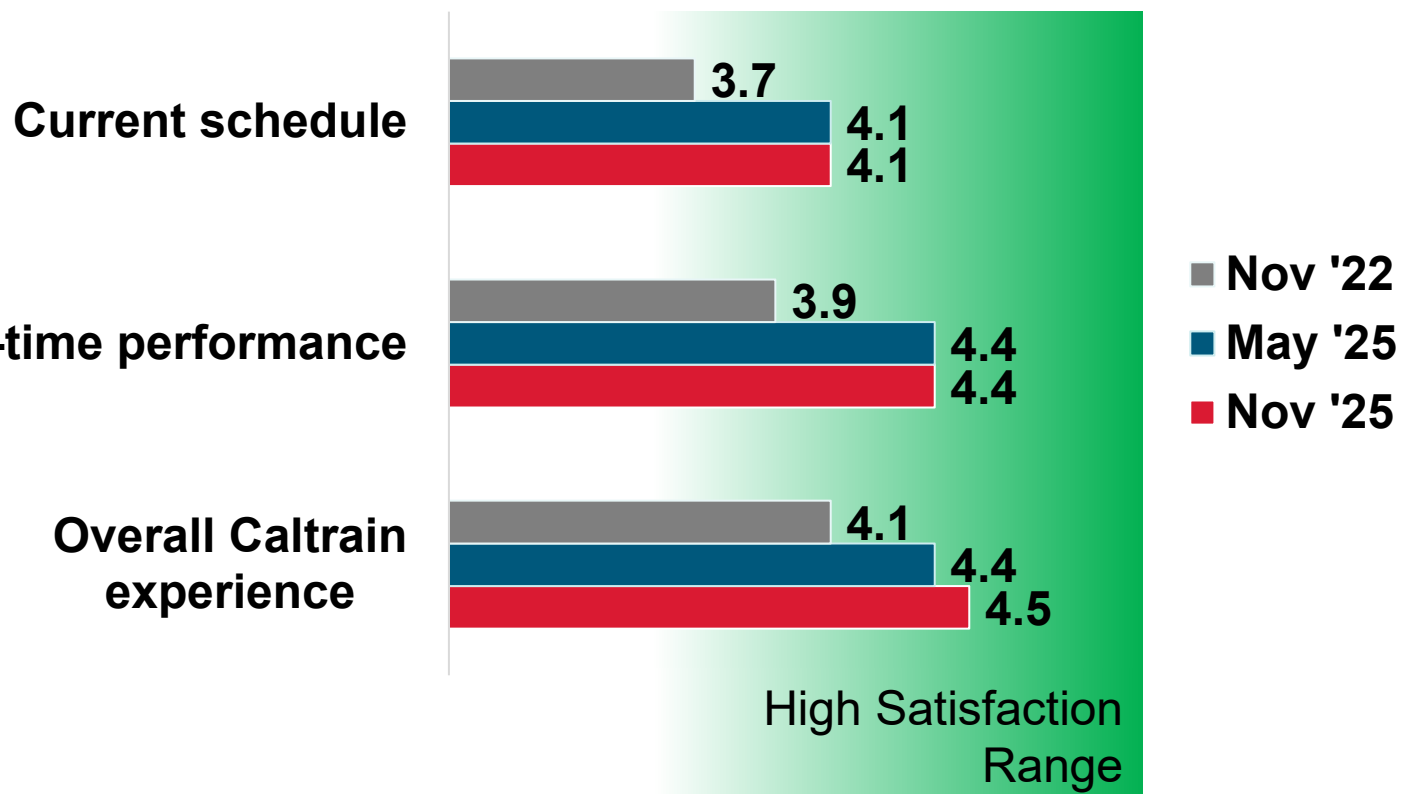


## Key Insights

- New riders are powering post-electrification ridership growth
- Hybrid work patterns create consistent ridership of 2-3 days per week

# Electrification is Driving Measurable Gains in Rider Satisfaction

Overall satisfaction is at a record high  
4.5 out of 5.0



Rating gains show strong momentum since 2022:

- on-time performance
- satisfaction with schedule

# The Rider Journey

The Caltrain experience is shaped across every stage of the journey



*The following slides highlight key insights and opportunities at each stage*

Plan

Arrive

Pay

Board

Ride

Get off

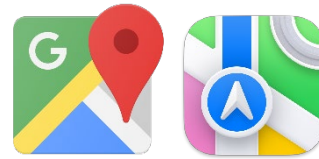
Leave

## Trip planning is powered by the Caltrain website

### Primary Planning Tools



Caltrain  
<https://www.caltrain.com>



Caltrain Website (68%)

Google/Apple maps (28%)



Trips are primarily for work (67%), followed by social/recreational travel (19%)

### Key Finding and Insight

- Caltrain.com is the primary source of information for riders
- Trip purpose shapes where riders go to for Caltrain information (commute vs. leisure)

Plan

Arrive

Pay

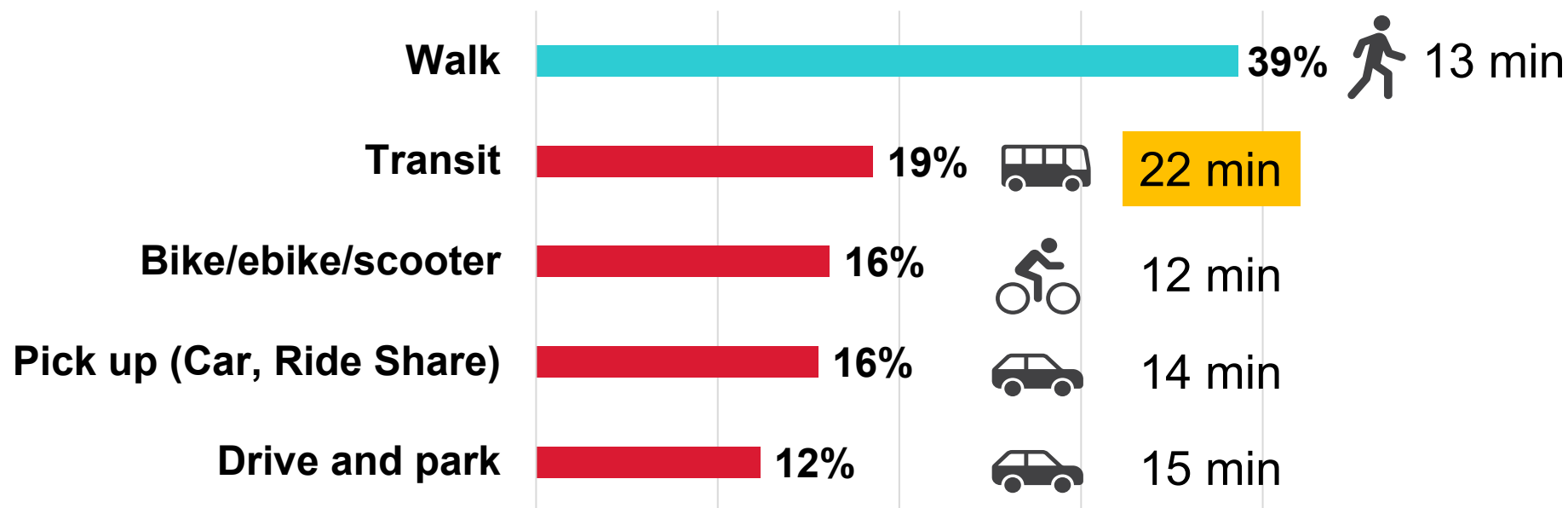
Board

Ride

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Leave

## First Mile: Walking dominates, transit connectivity is a gap



### Key Finding & Insight

- Improving the ways riders get to Caltrain is critical for a seamless rider experience
- Transit connections are under-utilized and slowest option

Plan

Arrive

Pay

Board

Ride

Get off

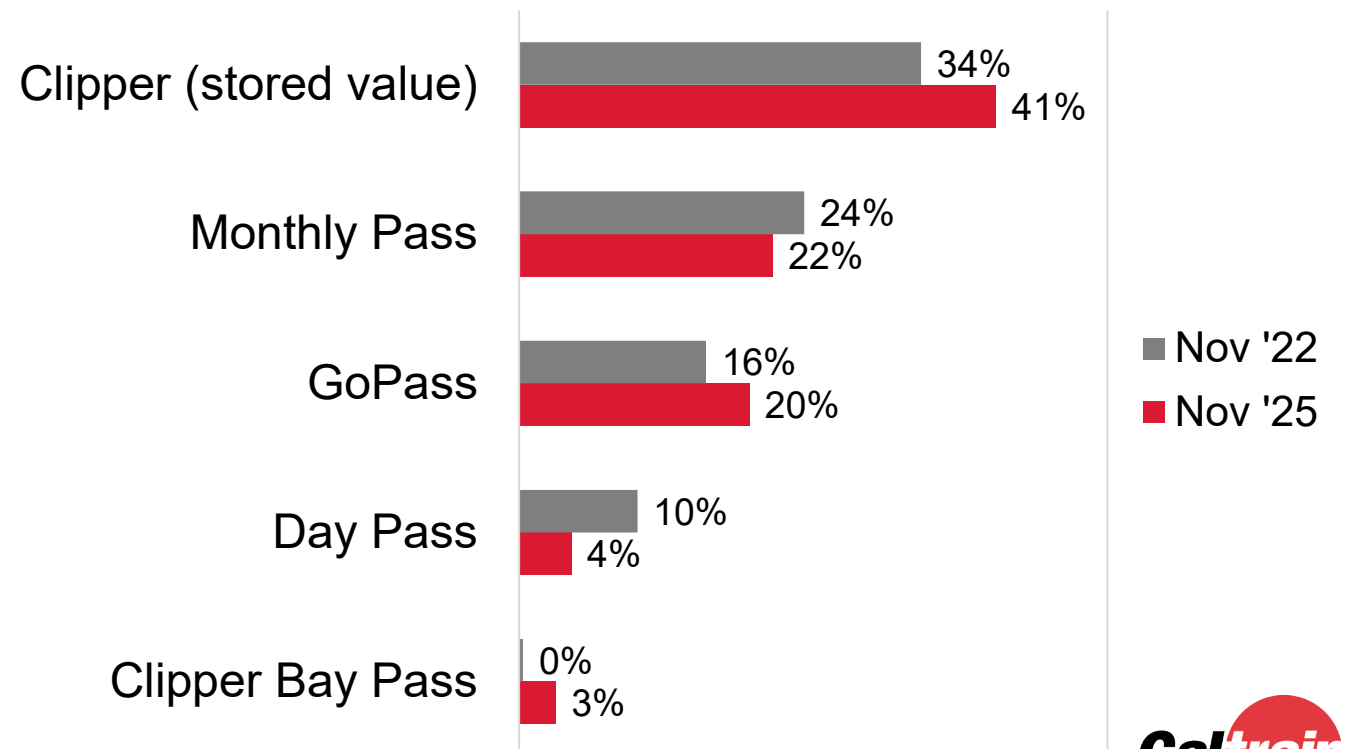
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## Riders are moving to Clipper and unlimited trip Passes

- Riders are shifting towards Clipper as their primary payment method
- Continued decline in paper-based tickets
- Growth in pass-based products points to growing demand for institution-sponsored unlimited travel options (GoPass, Bay Pass\*)

\*Bay Pass pilot began August 2022

### Clipper usage continues to grow



Plan

Arrive

Pay

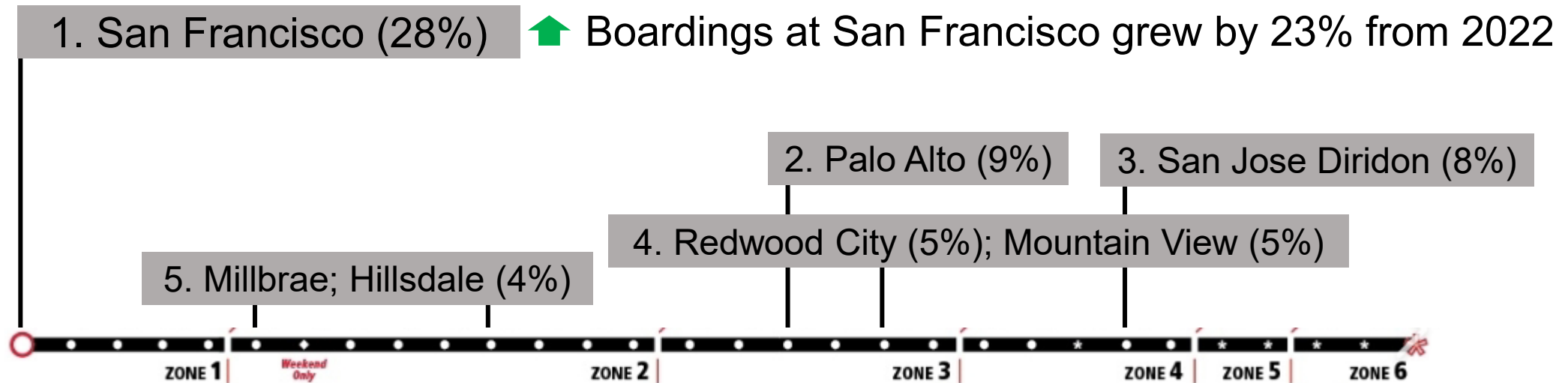
**Board**

Ride

Get off

Leave

## San Francisco leads boardings, with demand spread across the corridor



### Key Finding and Insight

- Boardings are concentrated in major urban hubs, led by San Francisco
- Electrification is reinforcing ridership between San Francisco and San Jose

Plan

Arrive

Pay

Board

Ride

Get off

Leave

## Rider comments

*“I used to take Caltrain many years ago before bullet and new trains. Riding it now is both convenient and a joy. Thank you!!”*

*“Staff / crew are so nice and professional made riding a great experience”*

*“The 809 morning crew are always well prepared with updates and greet riders with kindness and respect. The 809 morning crew make every morning commute feel safe and comfortable.”*

*“I love the quality of the train. It's beautiful and comfortable to ride in. Thanks for all you do!”*



Plan

Arrive

Pay

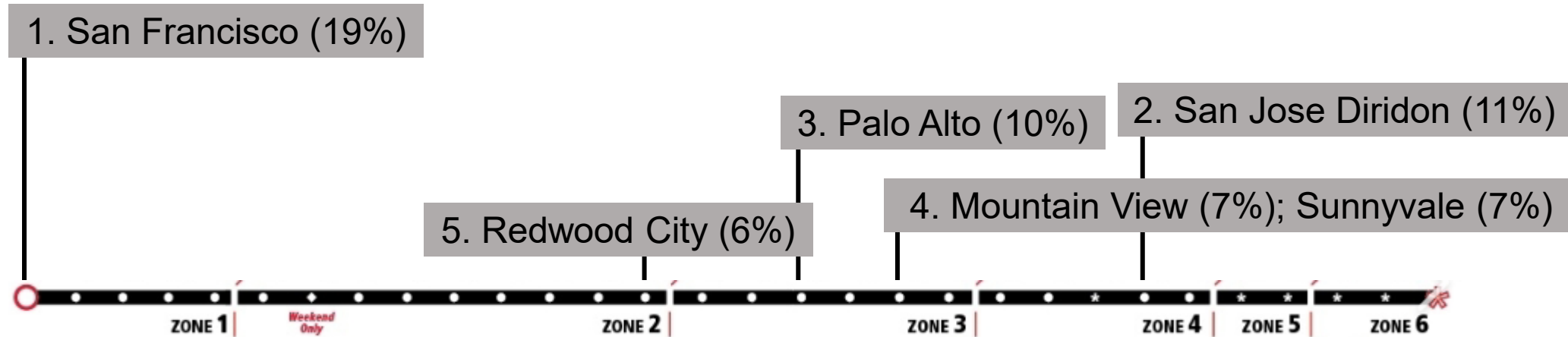
Board

Ride

Get  
off

Leave

## Departing riders are concentrated in San Francisco and Santa Clara Counties



### Key Findings

- San Francisco Station continues to have the highest share of departing riders (19%)
- Santa Clara County collectively represents the highest share of departing riders (48%)

Plan

Arrive

Pay

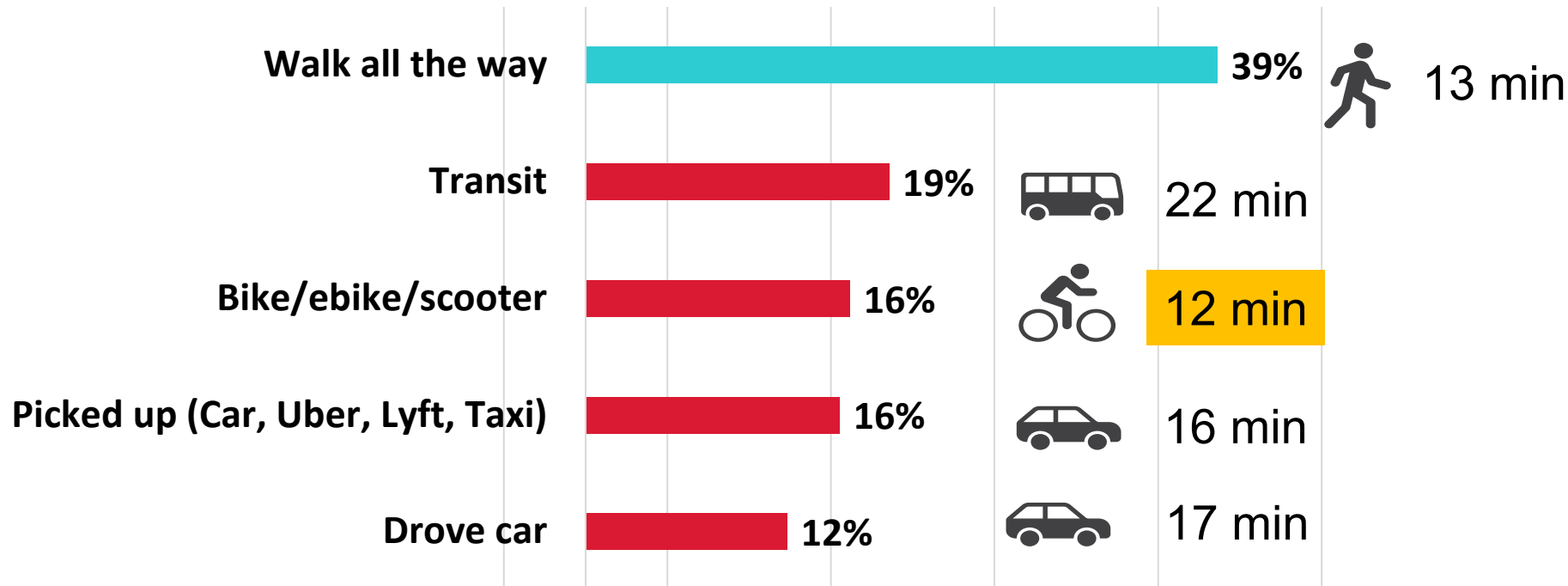
Board

Ride

Get off

Leave

## Almost 2 in 5 riders walk to their final destination



### Key Findings

- Walking is even more common for the final mile, with 39% walking from stations vs. 33% to stations
- Micromobility helps departing riders travel farther, with average rides of 12 minutes

# Example How Results Used

- Ridership Growth: Informing who to target for marketing (youth spring; monthly pass fall/winter)
- Service planning: Core riders and locations
- Customer experience: Focus on improving Caltrain website experience
- Title VI / Fare Studies: Baseline information for scenario planning

FOR MORE INFORMATION

[WWW.CALTRAIN.COM](http://WWW.CALTRAIN.COM)

