

2025 Triennial Customer Survey

**Citizens Advisory Committee
May 20, 2026
Agenda Item 10**



Survey Purpose & Methodology

Caltrain Rider Snapshot

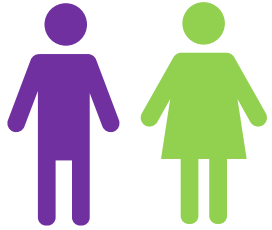
The 2025 Caltrain Triennial Survey provides a snapshot of the rider experience since 2022, including **who our customers are** and **how they use Caltrain**.

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

Executive Summary

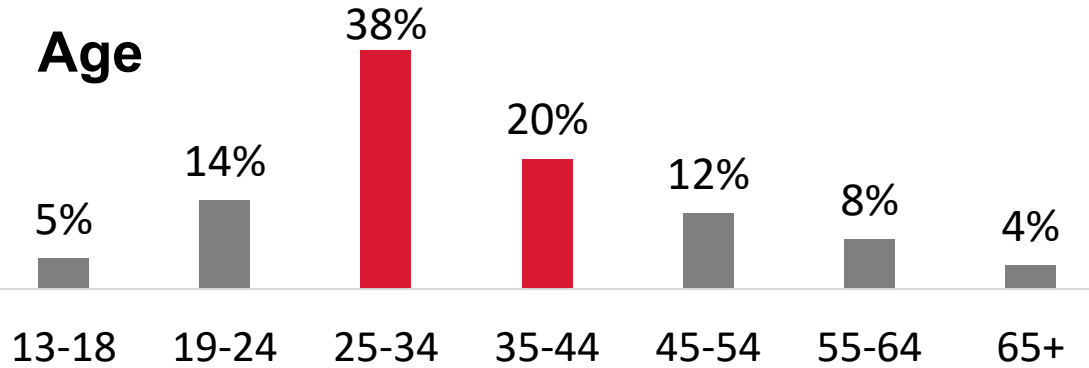
- Continued high customer satisfaction (4.5 of out 5)
- Riders: younger, 1/3 riding system less than one year; mix high and low-incomes using the system
- Primary use: work/commute trips
- Hybrid schedules: ~2–3 average days per week
- Clipper main payment method
- Growth shaped by new riders and SF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

Who is Riding? Demographics



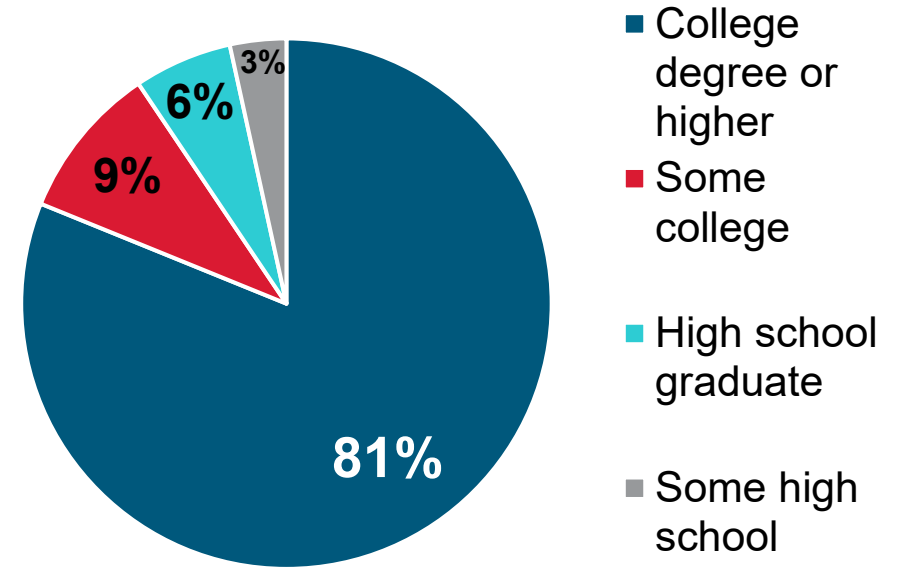
56% / 42%

Age

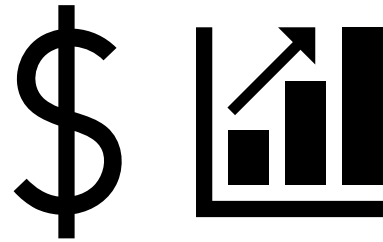


Education

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 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

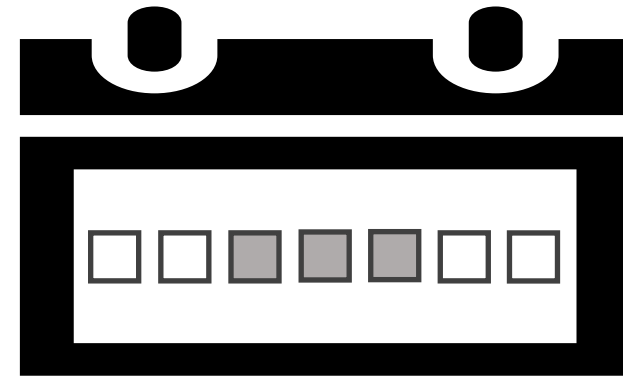
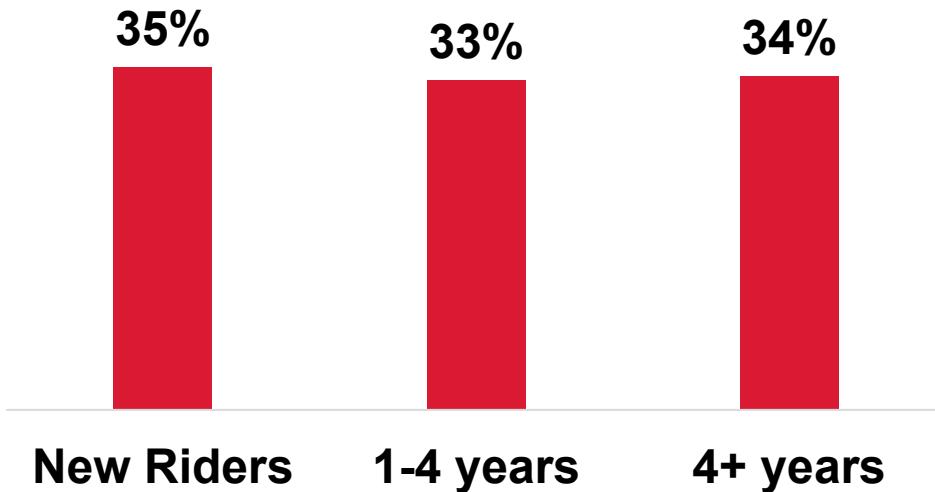
Income Category	Percent
Extremely Low Income	10%
Very Low Income	10%
Low Income	17%
Median	6%
Moderate	6%
Above moderate	50%
Total	100%
Caltrain Low Income Ridership	37%

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

Hybrid Commute Patterns Shape 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

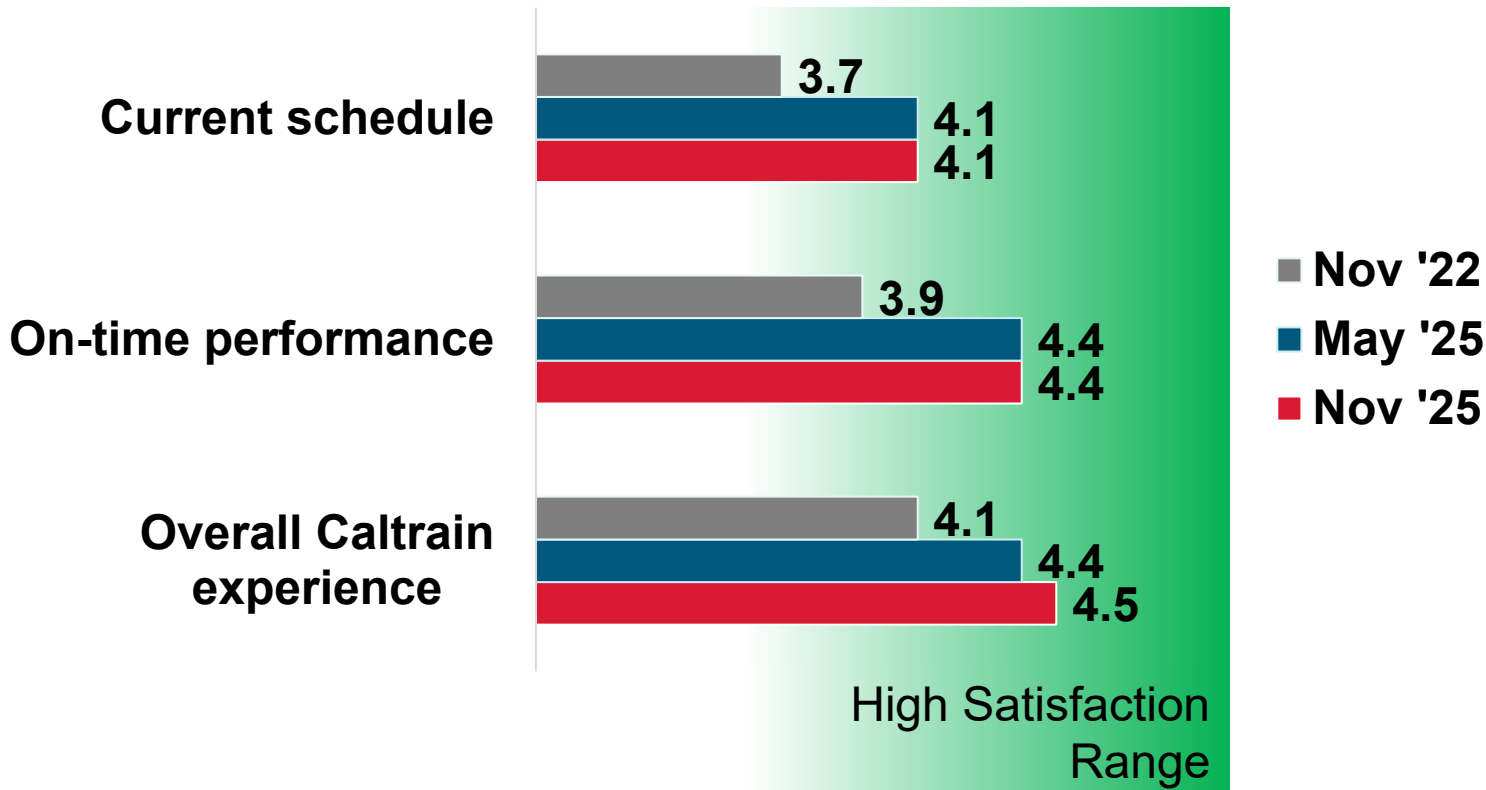


Key Insights

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

Electrification is Delivering Measurable Gains in Rider Satisfaction

Overall satisfaction is at a record high
4.5 out of 5.0



92% are satisfied with Caltrain overall

Strong gains since 2022 in key areas:

- 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

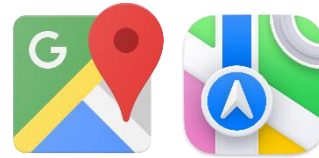
Leave

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

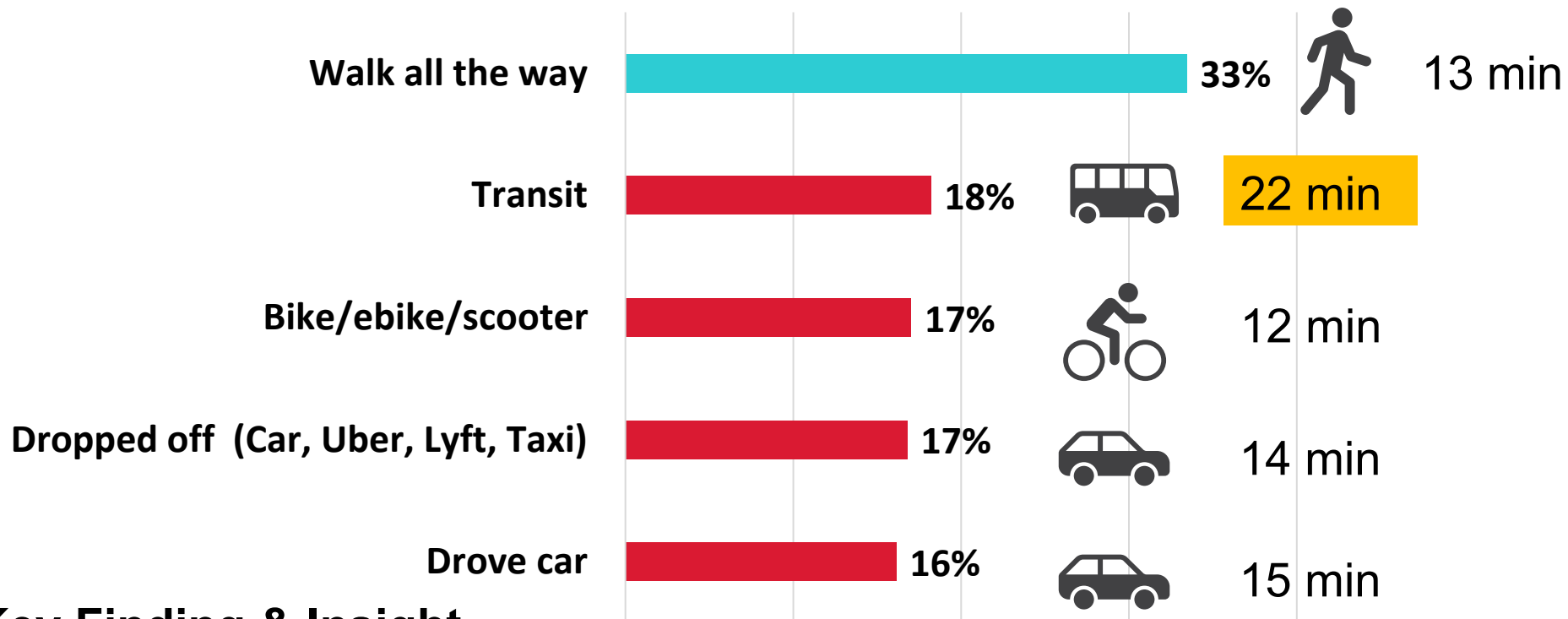
Board

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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

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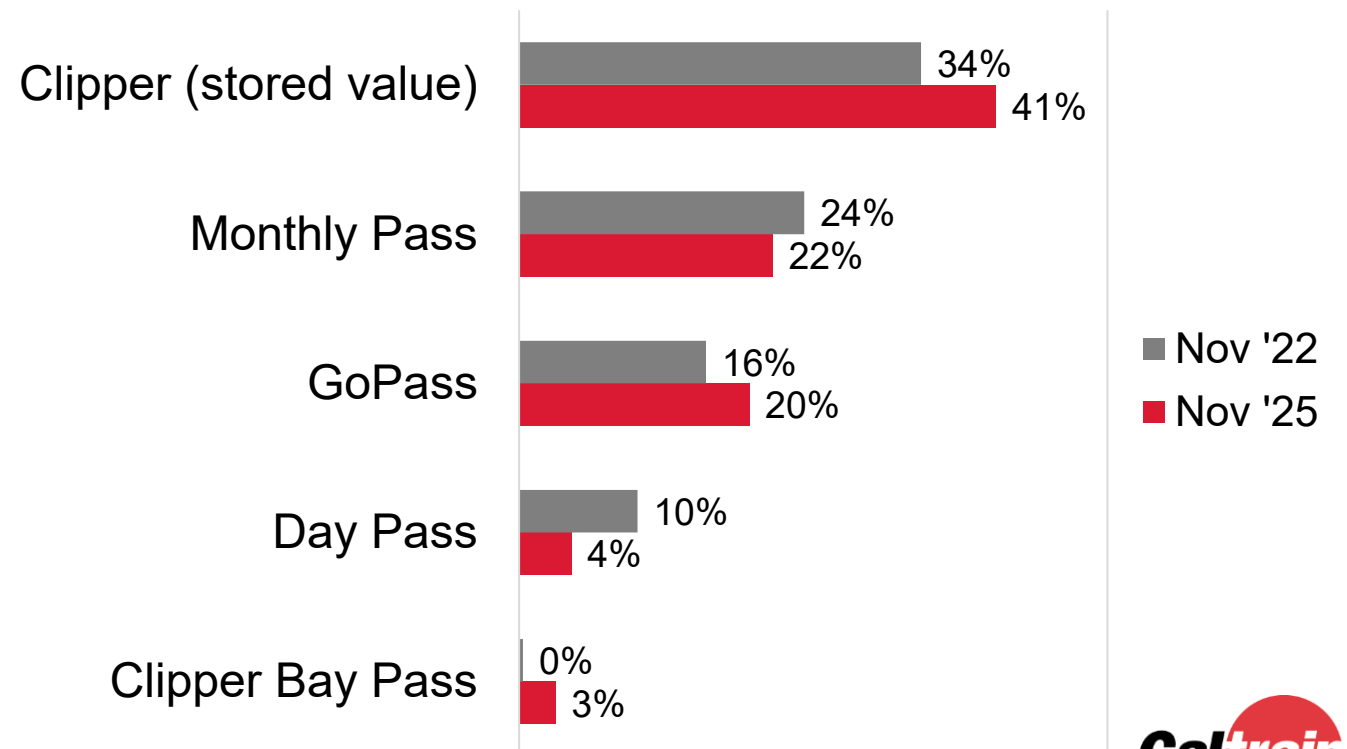
Leave

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

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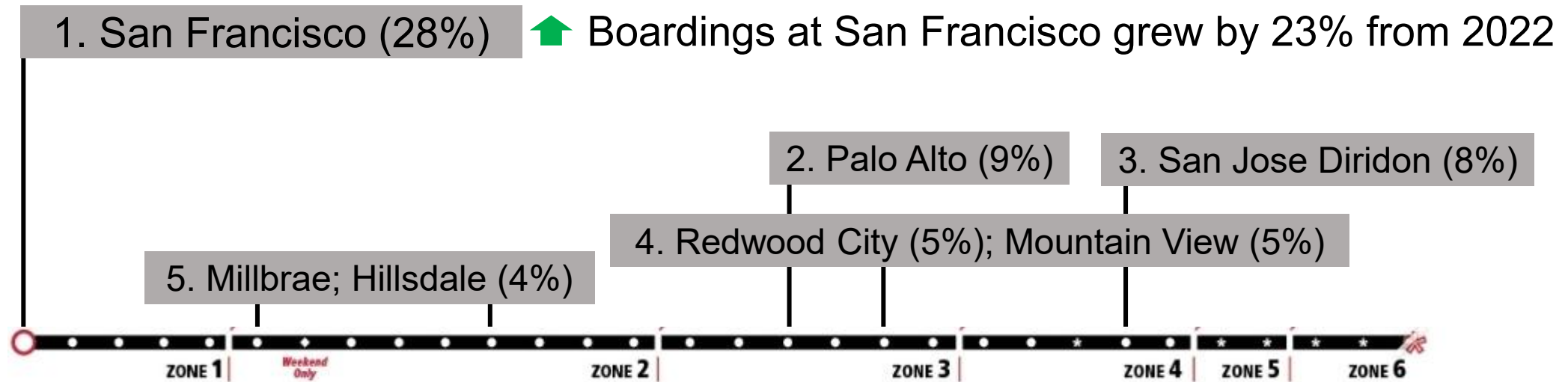
Board

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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

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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

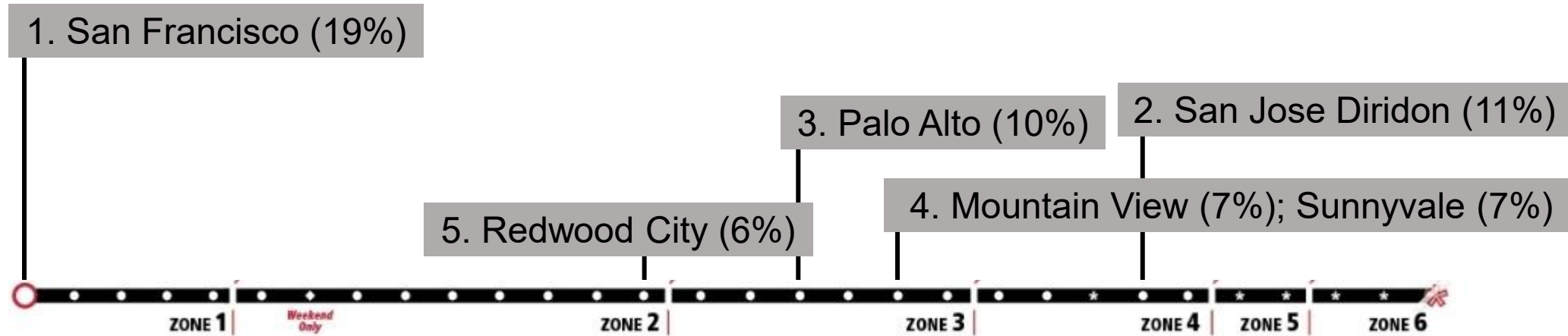
Board

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

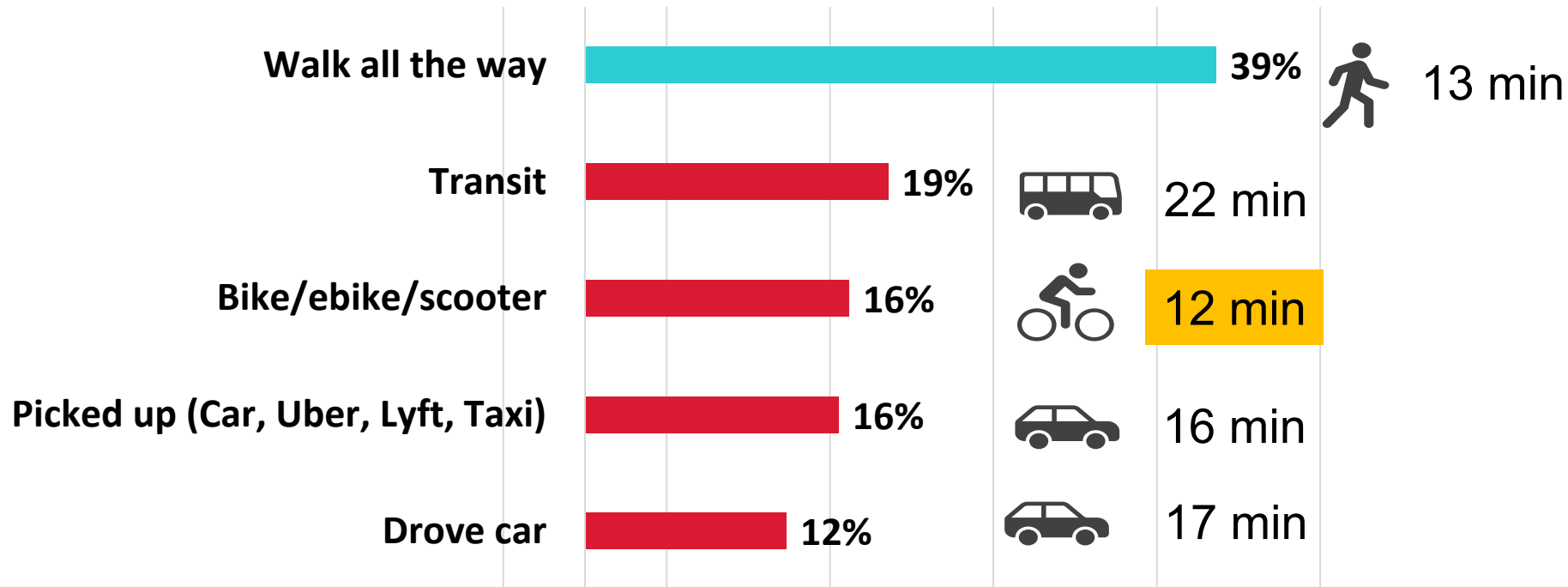
Board

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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

How Results are 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

