

# ***2025 Triennial Customer Survey***

**Bike and Active  
Transportation Committee  
May 21, 2026  
Agenda Item X**



# Survey Purpose & Methodology

## Caltrain Rider Snapshot

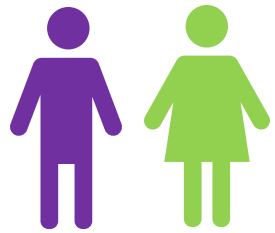
The 2025 Caltrain Triennial Survey provides a snapshot of the rider experience since 2022, including **who our customers are** and **how they use Caltrain**.

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

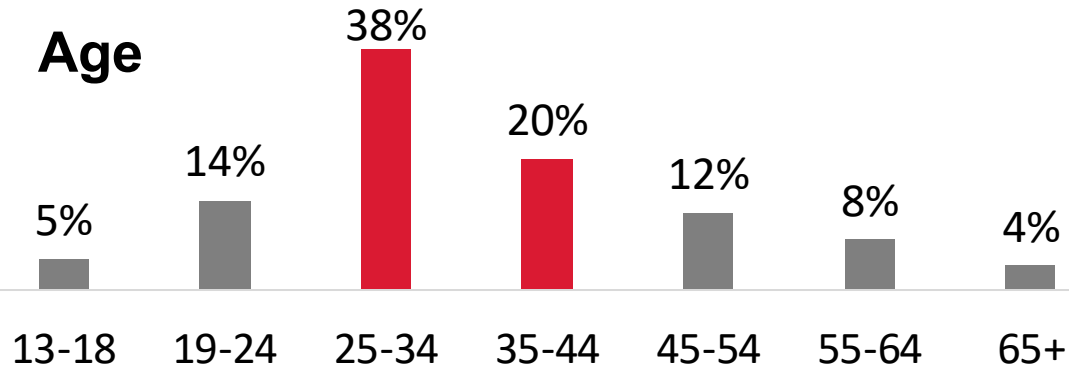
- Continued high customer satisfaction (4.5 of out 5)
- Riders: younger, 1/3 riding system less than one year; mix high and low-incomes using the system
- Primary use: work/commute trips
- Hybrid schedules: ~2–3 average days per week
- Clipper main payment method
- Growth shaped by new riders and SF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

# Who is Riding? Demographics



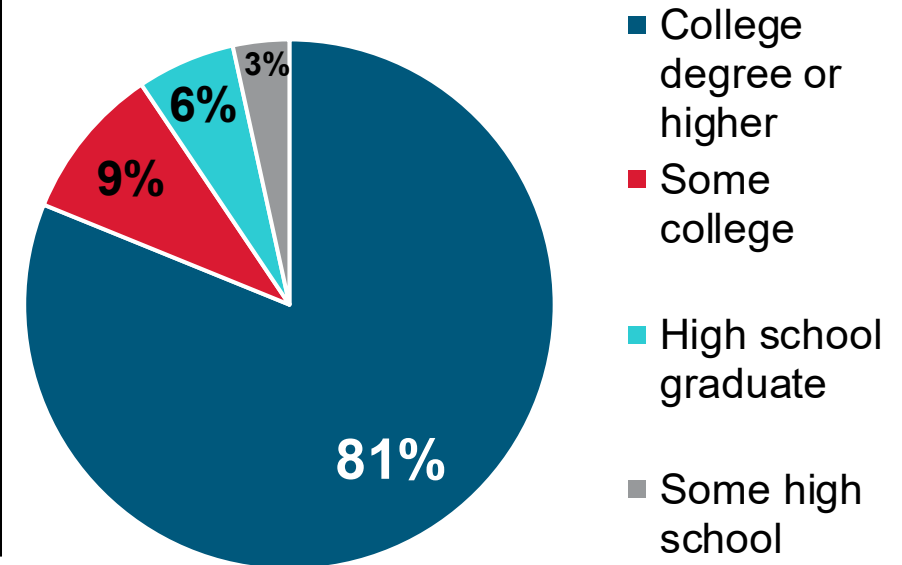
56% / 42%

## Age

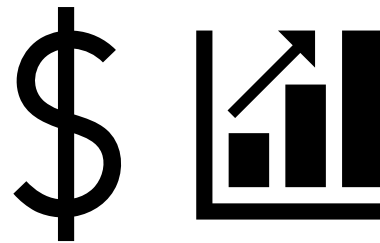


## Education

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%
<b>Caltrain Low Income Ridership</b>	<b>37%</b>

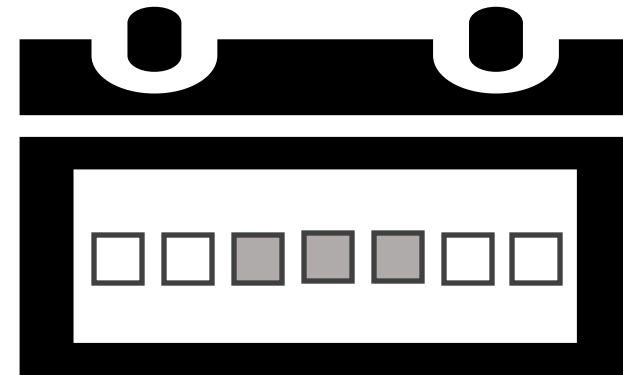
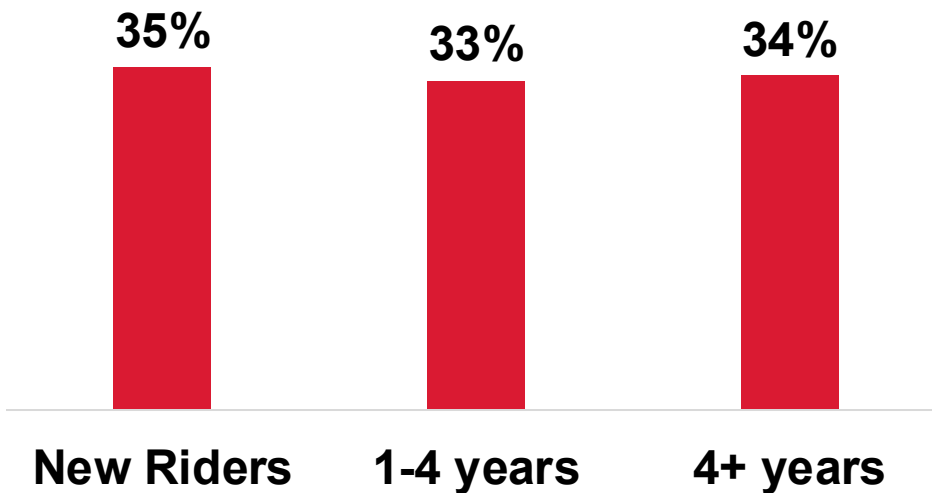
\*[As defined by State income limits by CA county](#)



# 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

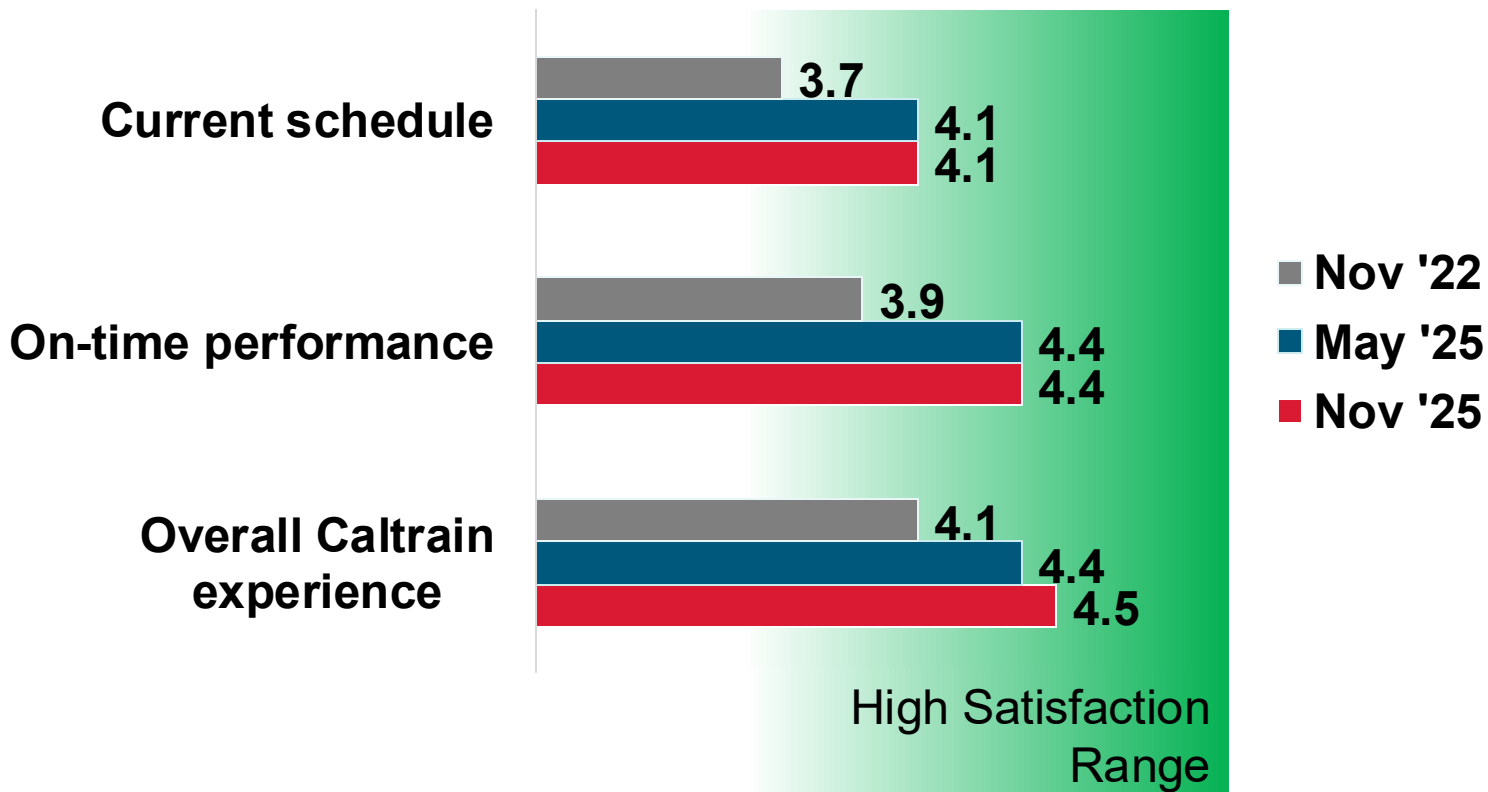


## Key Insights

- 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



# Bike and Scooter Riders are Core Caltrain Riders

## Why micromobility riders matter to Caltrain

- 1 in 6 riders (17%) use a bike or scooter on their trip
- More commute oriented than other riders, using Caltrain at least 3-4x/wk and primarily for work (79%)
- Highly satisfied with Caltrain overall (4.5 / 5)



## Key Insight and Opportunities

- Bike and scooter rider patterns are close to pre-COVID rider behavior
- Station resources (bike parking, bike wayfinding) should target most popular stations (San Francisco, Palo Alto, San Jose Diridon)
- Most common rider requests: more onboard capacity, better organization system, smoother bike boarding

# 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

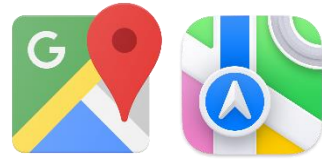
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## Trip planning is powered by the Caltrain website

### Primary Planning Tools



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



Google/Apple  
maps (28%)

Caltrain Website (68%)



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

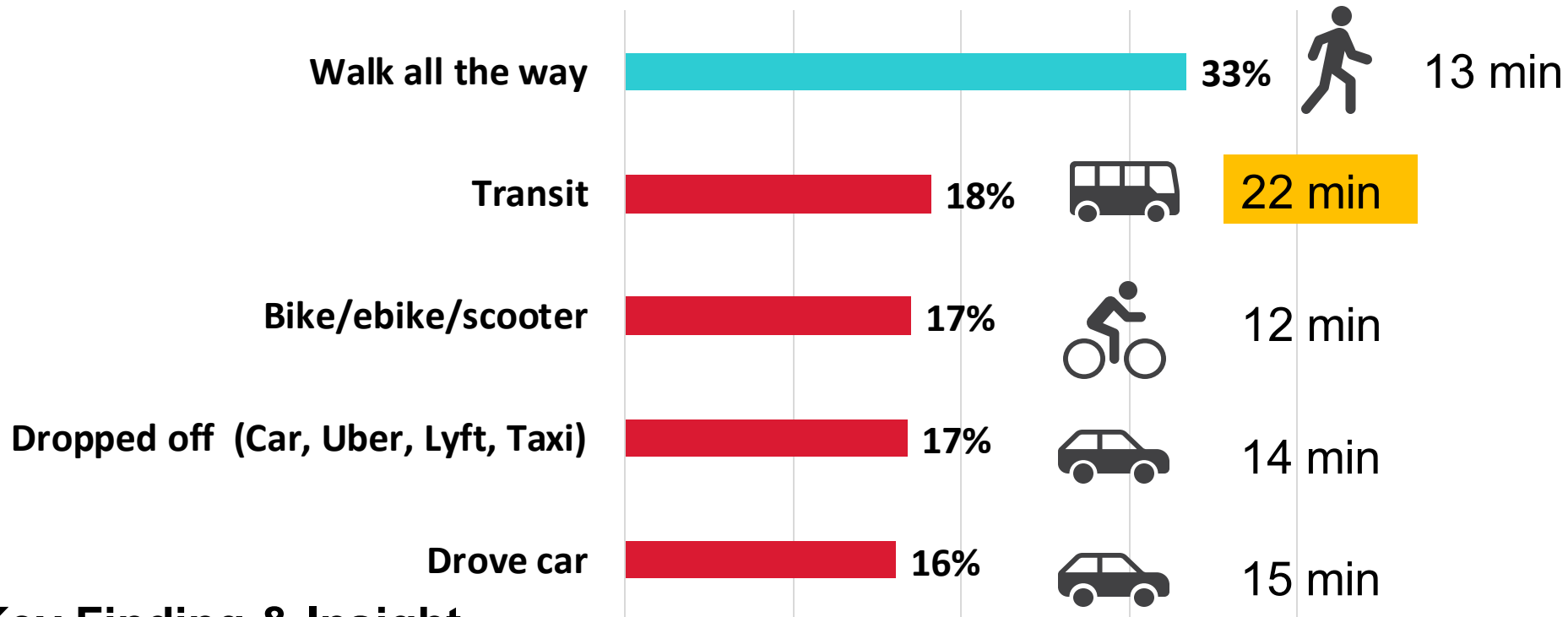
Board

Ride

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## 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

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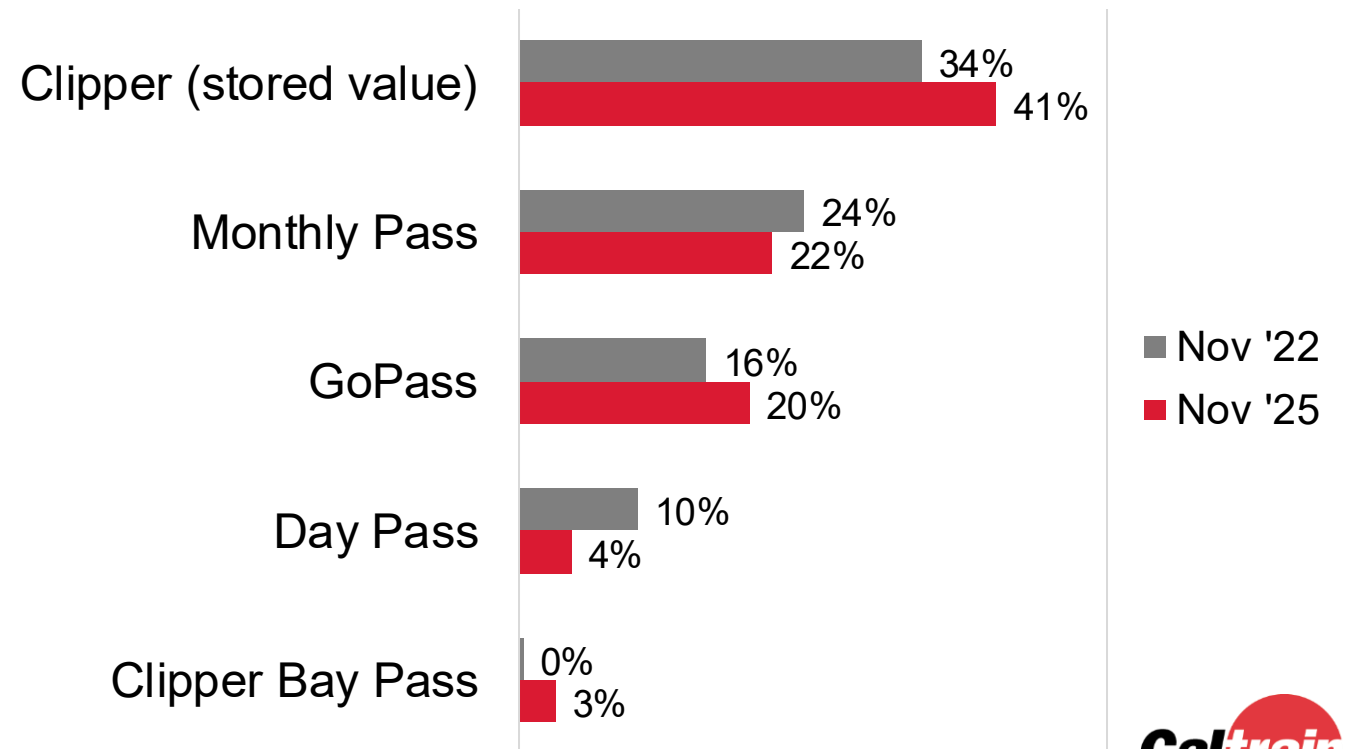
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## Riders are moving to Clipper and unlimited trip Passes

- 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

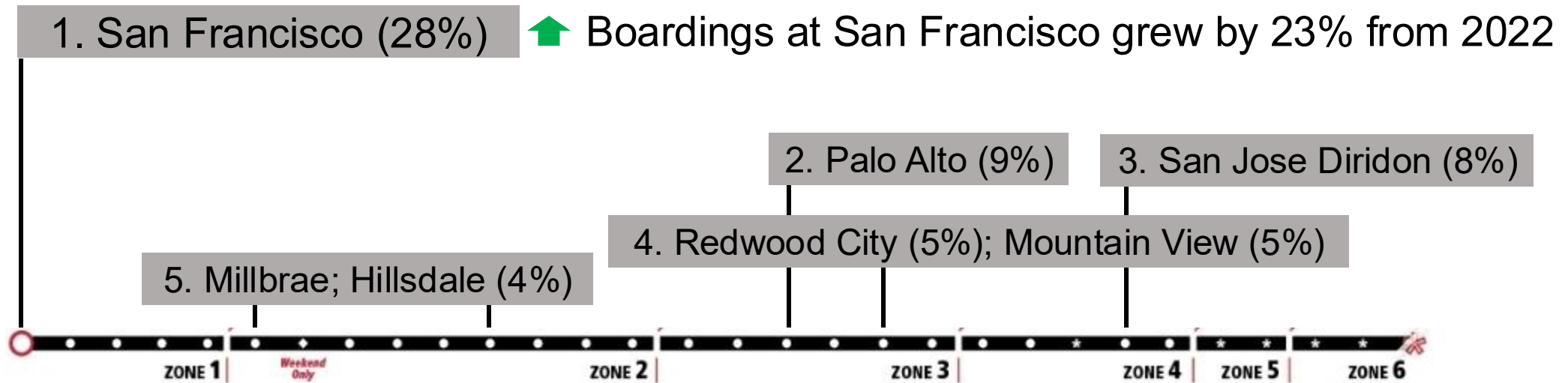
**Board**

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

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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

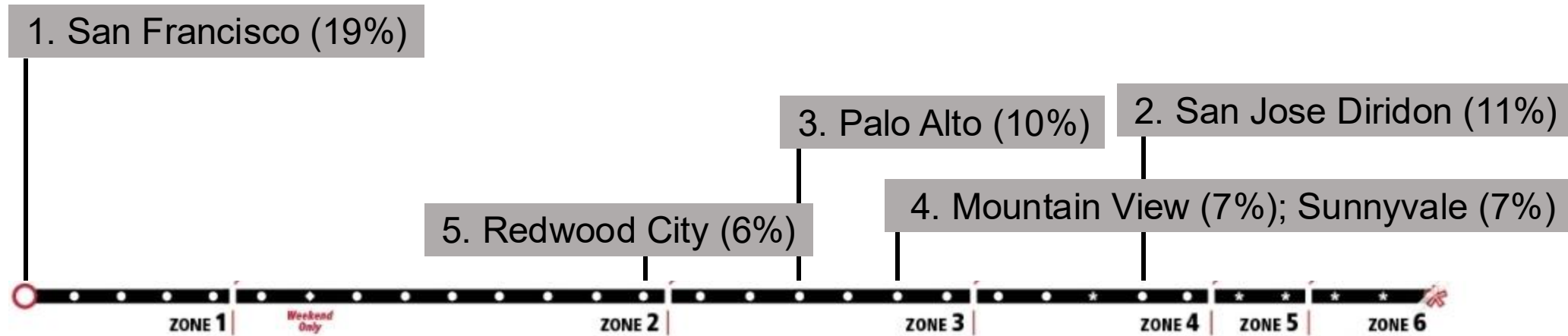
Board

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

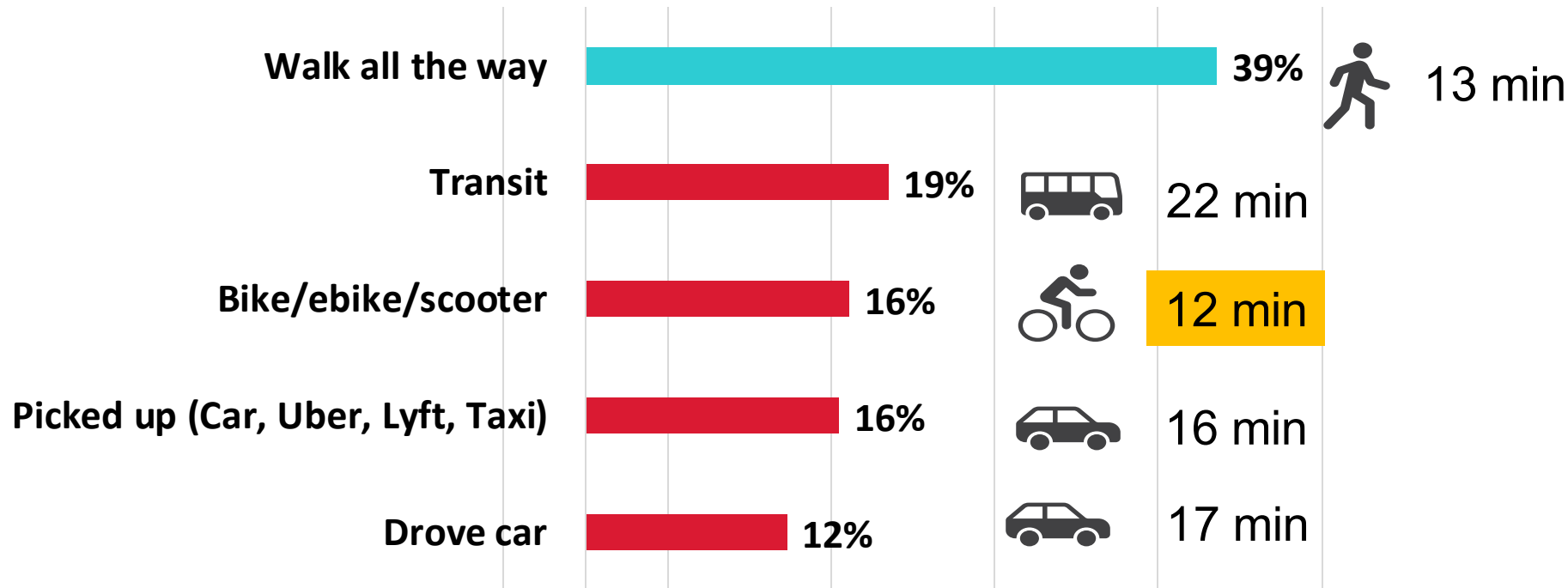
Board

Ride

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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

# Areas of Focus for Bike and Scooter Riders

Based on Triennial and bike-focused RIDE Panel survey:

- Improve bike and scooter boarding through increased “priority boarding” communications starting June 2026
- Address onboard bike capacity by promoting e-lockers at Bike to Wherever Days and explore wayfinding improvements

FOR MORE INFORMATION

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

