

Clipper® Executive Board

June 27, 2022

Agenda Item 4c

Clipper Customer & Non-User Research Survey Results Update

Subject:

Update on the preliminary results of the 2022 survey to research Clipper customer and non-user travel behavior and attitudes.

Background:

Every two years, the Clipper program conducts a survey of Bay Area transit customers. The purpose of this effort is to understand current Clipper user satisfaction, transit habits, attitudes, and opinions of Clipper customers, as well as to identify barriers to using Clipper and to gauge potential for future usage among non-users.

This year, the research effort consisted of quantitative and qualitative elements. The quantitative portion of this research effort was conducted as a mail-driven survey. This approach casts a wider net than the intercept survey used in previous years for infrequent riders and riders who do not use Clipper. Furthermore, the multi-modal approach allows for more balanced representation both geographically and demographically, including low-income respondents.

The mail-driven survey ran for about six weeks in April and May 2022.

Preliminary Key Findings:

The surveys were offered in English, Spanish, Chinese and Vietnamese. Respondents were screened for transit ridership: 1,932 Clipper customers and 596 non-Clipper users completed interviews for a total of 2,528 completed interviews.

Clipper Customers

- Satisfaction among Clipper users remains very high across users on all agencies. Overall, 95 percent of Clipper users are satisfied with the experience of using Clipper.
- 97 percent of Clipper users (both mobile and plastic users) say they would recommend it to other transit riders.
- Transit station ticket machines remain the most common place to purchase and load value on a Clipper card, followed by autoload and the Clipper website.

- Nearly two-thirds of Clipper mobile users and just under 60 percent of plastic card users have registered their cards. Not knowing a card could be registered is the most cited barrier.
- A small subset of Clipper users has contacted customer service recently, and those who did are generally satisfied with their experience. Mobile Clipper users report slightly higher levels of satisfaction.
- Clipper customers who have the Clipper app on their smart phones report using it for purposes of registering a Clipper card, checking their balance, and adding value.
- Upon hearing about the app's features, almost three-quarters of those who do not have the app installed are interested in using it in the future.

Non-Users

- A majority of those non-Clipper user riders purchase single-ride fares and pay for their ride at a station. Just over one-in-ten reports using a transit agency mobile app to pay their fares.
- About one-third of non-users are familiar with Clipper, and 60 percent express interest in using Clipper in the future prior to being presented with any information. Additional information further increases interest.
- Three-quarters of non-users say they are more likely to use Clipper after hearing that they can receive discounted tickets, pay for most Bay Area transit services, and that the correct trip fares are automatically calculated when using Clipper.
- Half of those who express interest in using Clipper in the future say they are interested in the mobile card, and another one-in-three say they are interested in both plastic and mobile Clipper. iPhone users gravitate more towards the mobile card compared to Android users.

Issues:

None identified.

Recommendations:

Information.

Attachments:

None.



Carol Kuester