

Clipper Customer & Non-User Research Survey Results

Subject:

Update on the key results of the 2024 survey to research Clipper customer and non-user travel behavior and attitudes, focusing on results by subgroup.

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.

Key Findings:

The surveys were offered in English, Spanish, Chinese, and Vietnamese. Respondents were screened for transit ridership: 2,064 Clipper customers and 451 non-Clipper users completed interviews for a total of 2,515 completed interviews.

Clipper Customers

- Satisfaction among Clipper users remains high across users on all agencies and across different demographic categories (94 percent). Nearly all (95 percent) of Clipper users say they would recommend it to others.
- Mobile card adoption has been very strong, particularly with Caltrain or VTA riders, riders 18–39 years old, or riders identifying as male.
- About 84 percent of Clipper users are unaware of upcoming changes to the Clipper system; however, once they hear about the new features and benefits, they are very interested in them, and their overall impression of these improvements is very good.
- The inability to see balances on card readers detracts from their favorable impression of the system's changes.

Non-Clipper User Transit Riders

- Forty-five percent of non-users pay single-ride fares with cash. Twenty-four percent use a single-ride ticket or token.

- Almost half of transit riders who don't use Clipper are not familiar with it.
- Non-users are most likely described as part of one or more of these subgroups: annual household income of at least \$100,000, employed, at least 50 years old, female-identifying, or a Santa Clara resident.
- About 89 percent of non-users are unaware of the upcoming changes to the Clipper system; however, upon learning about Next Generation Clipper features, non-users express a high level of interest in them.

Next Steps

- Research results will be used to develop the messaging for Next Generation benefits and improvements.
- The Clipper user and non-user research summary reports are available to interested parties upon request.
- The next Clipper research effort will be in 2026 with planning expected to begin in late 2025.

Issues:

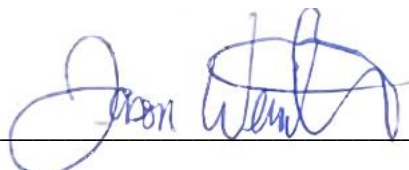
None identified.

Recommendations:

Information.

Attachments:

- Attachment A: Clipper® Customer & Non-User Research Results



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