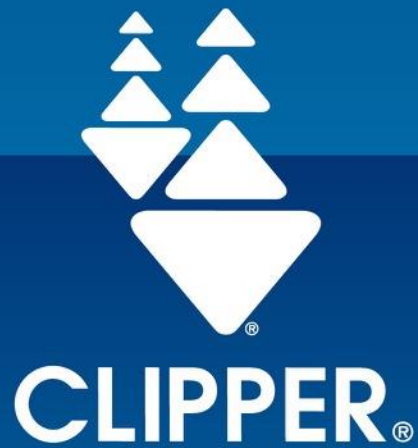




Clipper® Customer & Non-User Research Results

Clipper Executive Board Meeting

October 28, 2024

Clipper and Non-User Survey

- Spring 2024
- Address-based sampling
- Transit riders
- 2515 completed surveys
 - 2064 Clipper users
 - 451 Non-users
- English/Spanish/Chinese/Vietnamese surveys

Win a \$200 Visa Gift Card!

On behalf of the Metropolitan Transportation Commission, EMC Research is conducting a survey of residents in your area and wants to hear your opinion about transportation. Your household has been randomly selected to participate in this important research effort. Your opinion is important to us!

Make your voice heard and enter to win a \$200 Visa gift card.

Take the survey online by visiting **BayAreaTransportationSurvey.com**

Enter the six-digit Survey ID Code printed on the other side of this card.

Invitations to this survey are being sent by postcard, email, and text, and only one response per person is allowed. You must be at least 18 years old. To take the survey over the phone call **1-888-207-2491**.

Must be at least 18 years old to participate. To enter the sweepstakes without participating in the survey, send a postcard with your name, mailing address, phone number, and Survey ID Code to the return mailing address. Limit one entry per household.





Clipper[®] Users

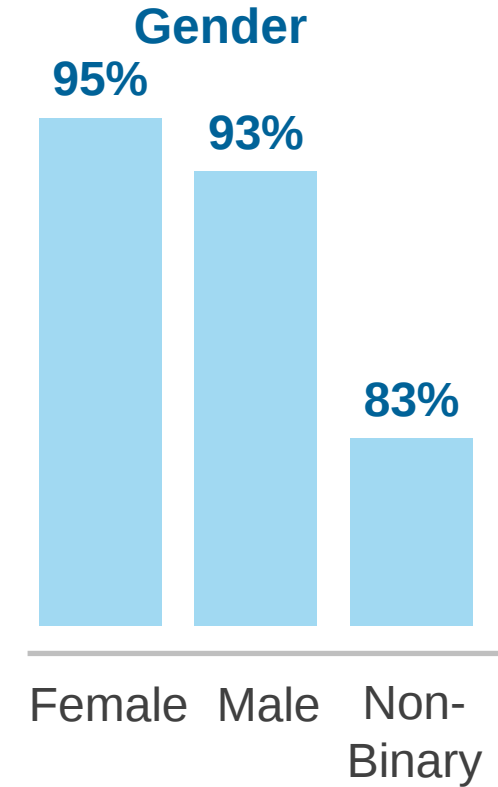
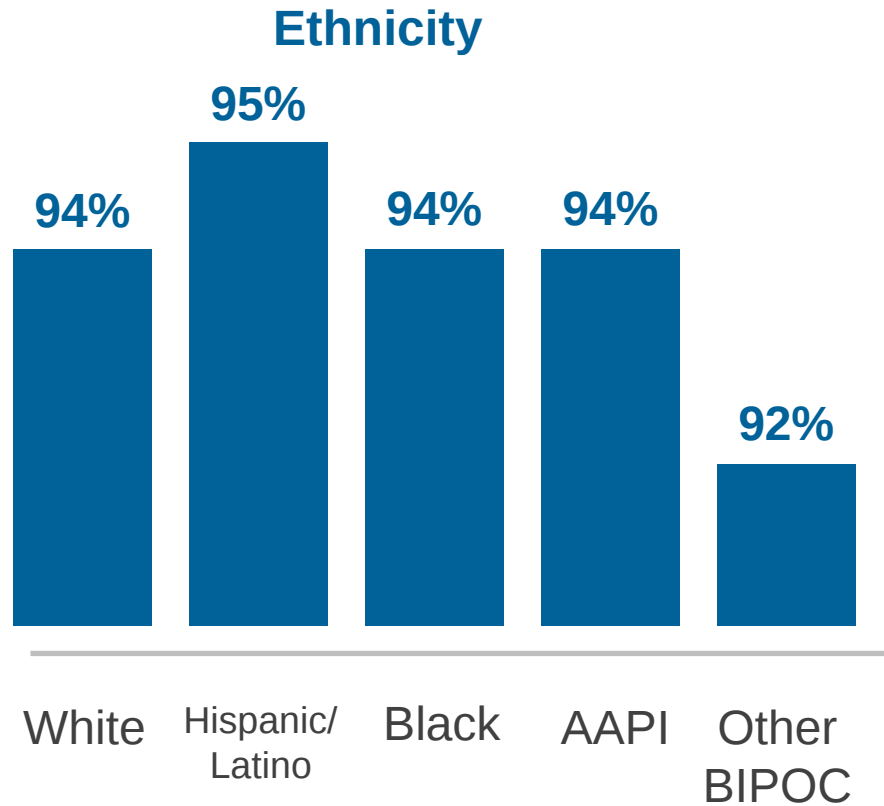
Clipper Program Satisfaction

94% Overall

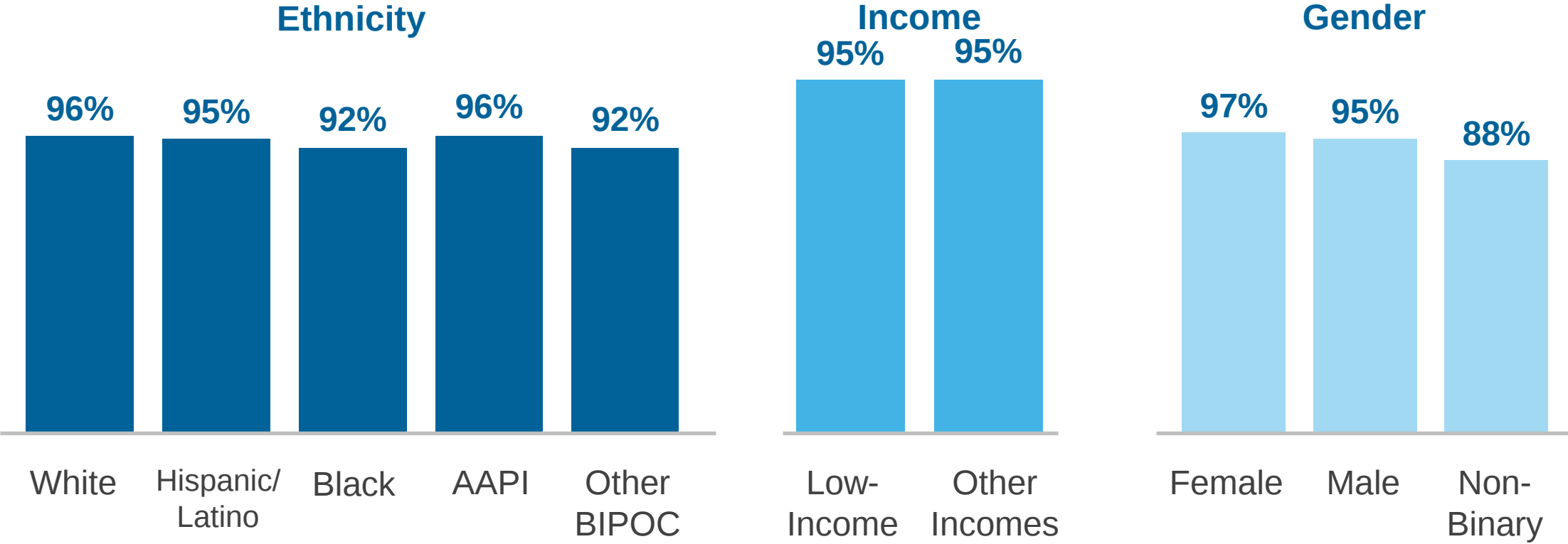
93% Mobile Card User

94% Plastic Card User

Satisfaction Among Clipper Users by Subgroup



Likely to Recommend Clipper to Other Transit Riders



Subgroups with Above Average Adoption: Clipper Cards

- Employed
- Annual household income that exceeds \$60,000
- More likely male than female
- Identifies as White or AAPI
- Alameda County resident

Subgroups with Above Average Adoption: Mobile Clipper Cards

- 18 to 39 years old
- Students
- Hispanic/Latino individuals & some other BIPOC groups
- Employed individuals
- Rides Caltrain and/or VTA
- Male identifying
- Santa Clara County resident

Subgroups with Below Average Adoption: Mobile Clipper Cards

- 50 years old or older
- Retired individuals
- Individuals with extremely low or very low income
- Rides SamTrans
- Contra Costa County resident
- Identifies as Black
- Female



Next Generation
Clipper® &
Current Clipper®
Users

Awareness of Upcoming Changes to Clipper System

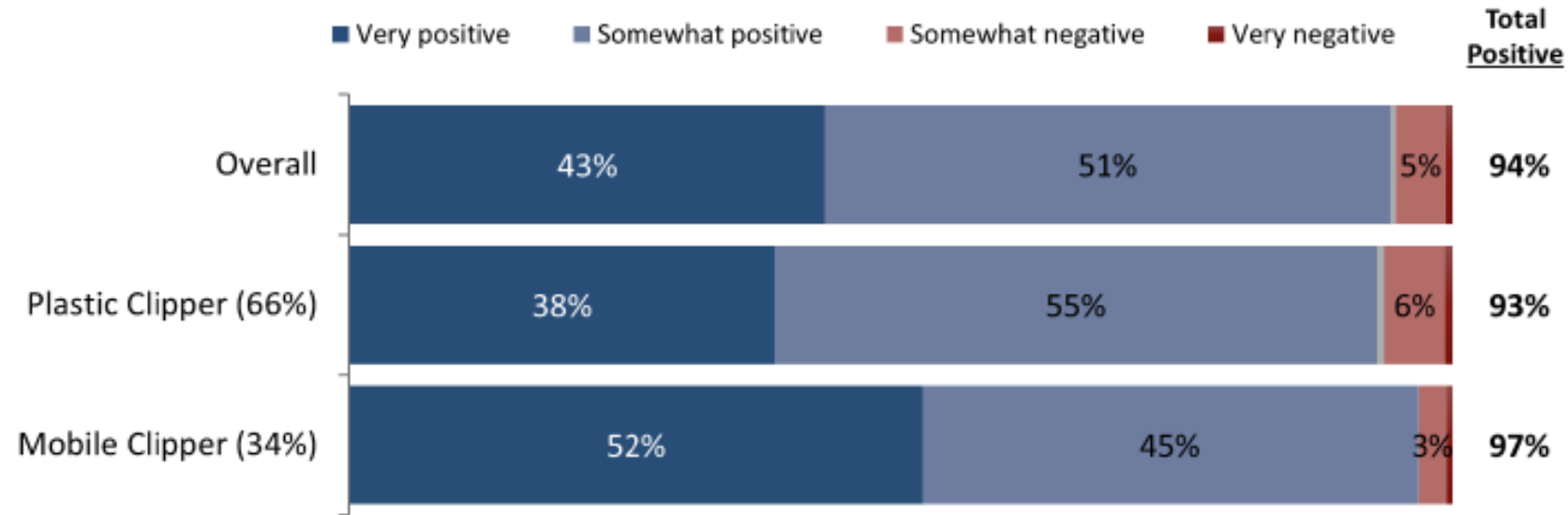
- 16% have heard something
- 84% haven't heard or seen anything

Interest in Upcoming Features

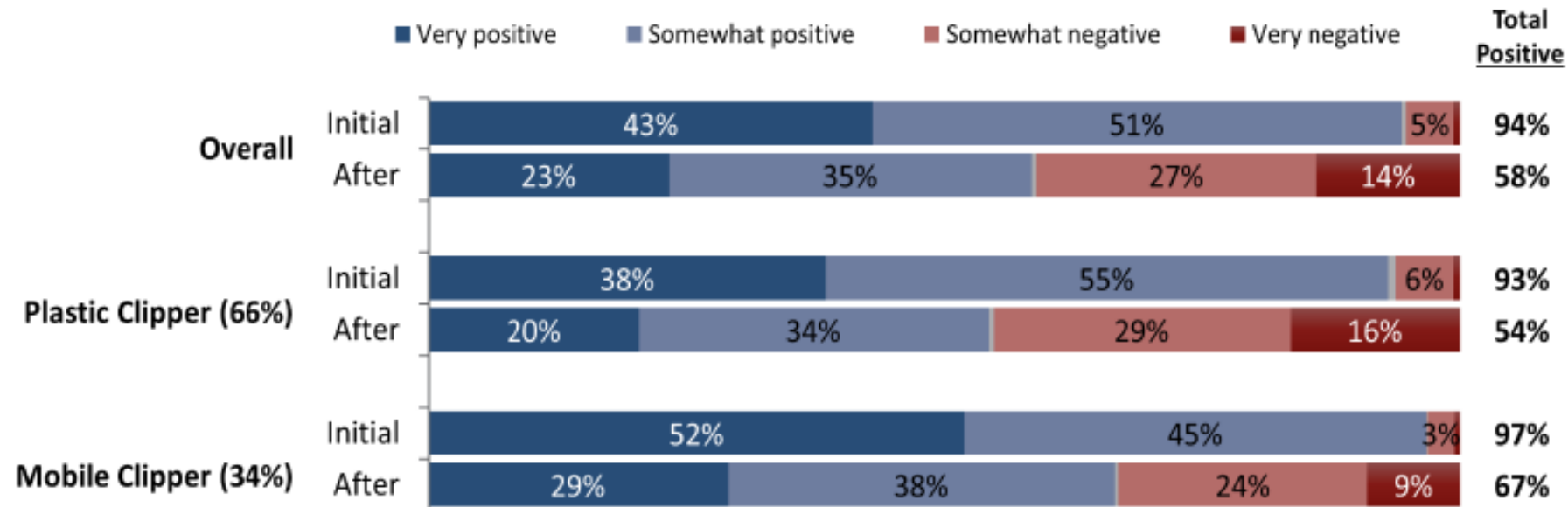
Clipper Customers

- Use value without wait time (87%)
- Move value between cards w/o contacting customer service (75%)
- Paying for transit with a chip-enabled card (72%)
- Capping your fare when you reach a certain amount (68%)
- View and manage someone else's Clipper card (54%)

Overall Impression of Upcoming Improvements Clipper Users



Impression After Hearing About Card Readers & Balance Visibility



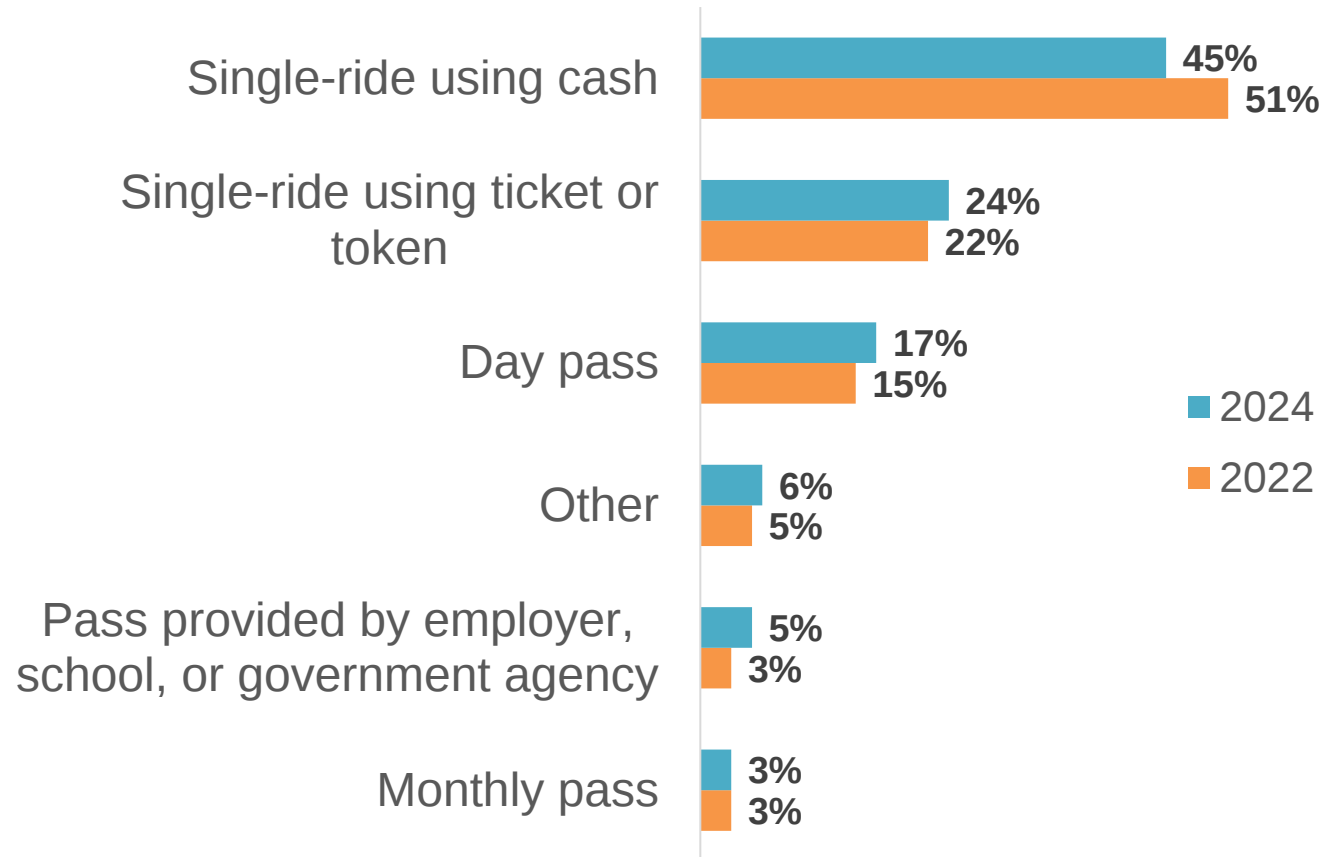


Non-Clipper[®] Users

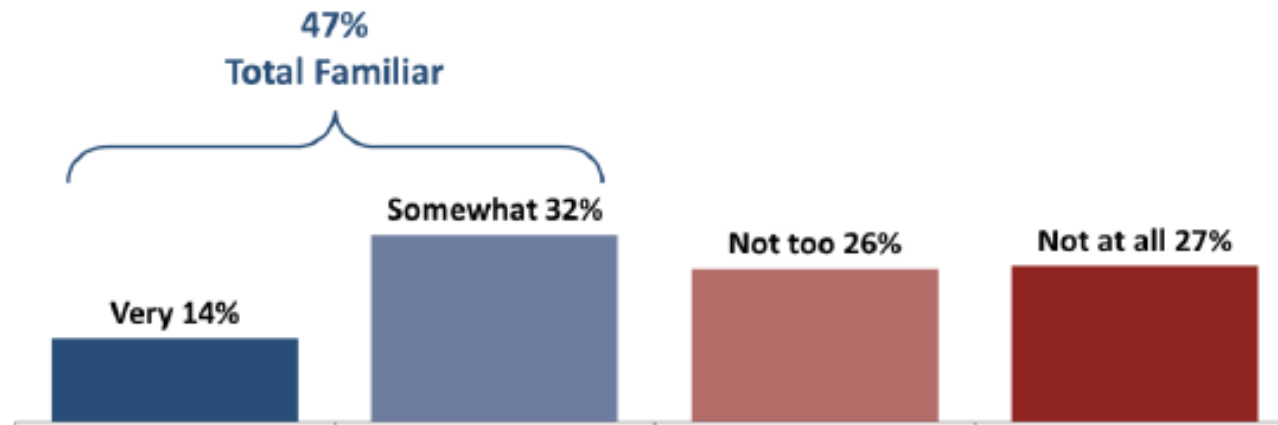
Top Characteristics of People Who Don't Use Clipper

- Annual household income of at least \$100,000
- Employed
- At least 50 years old
- More likely to be female-identifying than male

Type of Ticket or Pass Typically Used



Non-Users Familiarity with Clipper





Next Generation[®] Clipper & Non-[®] Users

Awareness of Upcoming Changes to Clipper System: Non-Users

- 11% have heard something
- 89% haven't heard or seen anything

Interest in Upcoming Features: Non-Users

- Use value without wait time (76%)
- Move value between cards w/o contacting customer service (71%)
- Paying for transit with a chip-enabled card (69%)
- Capping your fare when you reach a certain amount (64%)
- View and manage someone else's Clipper card (52%)

Next steps

- Development of messaging for Next Generation benefits and improvements
- Next research effort will be in 2026; planning will begin in late 2025.
- The Clipper user, non-user and qualitative research reports are available.



Questions?

Helise Cohn

Clipper Program Coordinator

hcohn@bayareametro.gov





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