

Clipper® Executive Board

April 13, 2020

Agenda Item 4e

Clipper® Intercept Survey Results

Subject: Results of biennial survey of Clipper customers and non-Clipper customers.

Background: Every two years, the Clipper program conducts an intercept survey of Bay Area transit customers. The purpose of this effort is to understand current Clipper user satisfaction and characteristics, and to understand attitudes of non-Clipper users and perceived barriers to Clipper use. Most recently, the survey was conducted in September/October 2019. We conducted 2,562 total interviews, including 1,933 interviews with Clipper customers and 629 interviews with those who did not pay with a Clipper card for their trip that day.

Results: The key results for Clipper users are:

- 96 percent of Clipper customers are satisfied, and 73 percent say they are very satisfied;
- 95 percent are likely to recommend Clipper to others, including 80 percent who are very likely to recommend it;
- 74 percent have had their Clipper card for more than a year; and
- 87 percent of respondents were frequent riders, using public transit three or more days a week.

Non-Clipper users are not unfamiliar with Clipper: 70 percent say they are somewhat or very familiar with Clipper, and 48 percent of respondents had used Clipper before. Of those users, 86 percent were somewhat or very satisfied with the experience.

However, respondents identified the following reasons for not using Clipper:

- I prefer to use an agency app (16%);
- Don't want to change/habit (12%);
- Don't ride transit often enough (10%);
- Lost my card (8%);
- Don't know how to get a card (7%); and
- Clipper would cost me more than I pay now for transit (7%).

We also surveyed non-users about their understanding of Clipper. Respondents believed the following statements about Clipper cards:

- 54 percent think Clipper gets you on the bus or through the fare gates faster;
- 46 percent believe Clipper is secure because of card and balance protection;
- 43 percent believe some agencies offer discounts if you use Clipper; and
- 35 percent recognize Clipper is not only for monthly passes.

Although many people correctly characterized Clipper features, to some respondents the features were unknown, or they had misconceptions about them. For most of the belief statements, 40 to 50 percent of respondents were unsure whether they were true or false. Respondents also had the following misconceptions about Clipper cards:

- 34 percent think you have to go in person to get a youth or senior card;
- 26 percent believe you can't get a transfer with Clipper; and
- 26 percent think you need to link a credit card or bank account to a Clipper account.

Of the non-Clipper users, 85 percent were regular transit riders, using public transit three or more days per week. Also of this group, 48 percent indicated they were much more likely to use Clipper once they learned that you can use Clipper to pay fares on most Bay Area transit services, and 46 percent were more likely to use Clipper because some transit agencies offer discounts to customers who pay with Clipper instead of cash. Upon hearing about all of Clipper's features, 70 percent said they were very or somewhat interested in using Clipper.

Among Clipper customers, Clipper's satisfaction ratings continue to be high, and almost all respondents would recommend Clipper to others. Among non-users, awareness is high and half have used Clipper in the past. Many non-users have misconceptions about what Clipper is and how it works; we have an opportunity to educate these transit riders about Clipper.

Attachments:

Attachment A: Topline Results for Clipper and Non-Clipper Surveys



Carol Kuester

Topline Results for Clipper® and Non-Clipper® Surveys



2019 Clipper Card Customer Survey Topline Results

January 16, 2020

Interview period: September 17-October 24, 2019

N = 1,993, weighted, margin of error = +/-2.3%

Satisfaction

- ☐ 96% of Clipper customers are satisfied; 73% say they are very satisfied
- ☐ 95% are likely to recommend Clipper to others, including 80% who are very likely to recommend it

Use of Clipper

- ☐ 74% have had their Clipper card more than a year
- ☐ Most frequent methods of adding value are
 - Transit agency ticket machine (42%)
 - Drug store or convenience store (19%)
 - Autoload (13%)
 - Online (9%)
 - School. Residential or work pass program (6%)
 - Online transit benefit program (6%)

Autoload

- ☐ 37% have used Clipper's Autoload feature
- ☐ 13% usually use Autoload to add value to their Clipper card

Registration

- ☐ 64% say their Clipper card is registered
- ☐ Of those who have not registered their card, top reasons were:
 - Didn't know I could register my card (37%)
 - Haven't gotten around to it (24%)
 - Don't know why I would register (14%)
 - Don't want to share personal information or afraid it will be stolen (11%)
 - Don't know how to register (10%)

Transit Usage and Demographics

- ☐ 87% of respondents were frequent transit riders, using public transit 3 or more days a week.
- ☐ 74% do not receive transit benefits.
- ☐ 61% are employed full- or part-time.
- ☐ 16% are of Hispanic, Latino or Spanish origin.



2019 Non-Clipper Card Customer Survey Topline Results

January 16, 2020

Interview period: September 17-October 24, 2019

N = 629, weighted, margin of error = +/-3.1%

Familiarity with/Interest in Clipper

- ☐ 70% are somewhat or very familiar with Clipper
- ☐ 48% had used Clipper before; of these, 86% were somewhat or very satisfied
- ☐ 59% would be somewhat or very interested in using Clipper based on current knowledge
- ☐ Top reasons for not using Clipper today:
 - I prefer to use an agency app (16%)
 - Don't want to change/habit (12%)
 - Don't ride transit often enough (10%)
 - Lost my card (8%)
 - Don't know **how** to get a card (7%)
 - Clipper would cost me more than I pay now for transit (7%)

Beliefs about Clipper

- ☐ 54% think Clipper gets you on the bus or through the fare gates faster
- ☐ 26% believe you can't get a transfer with Clipper; 46% don't know
- ☐ 34% think you have to go in person to get a youth or senior card; 48% don't know
- ☐ 43% believe some agencies offer discounts if you use Clipper; 46% don't know
- ☐ 35% recognize Clipper is not only for people who use monthly passes; 40% don't know
- ☐ 33% believe Clipper is convenient for infrequent transit riders; 37% don't know
- ☐ 46% believe Clipper is secure because of card and balance protection
- ☐ 26% think you need to link a credit card or bank account to a Clipper account; 46% don't know

Riders said they were much more likely to use Clipper after learning....

- ☐ You can use Clipper to pay fares on most Bay Area transit services: 48%
- ☐ Some transit agencies offer discounts to customers who pay with Clipper instead of cash: 46%
- ☐ You can load cash value and passes for multiple transit agencies on a single card: 41%
- ☐ You can add value to your Clipper card online, at a transit agency ticket machine, or at a participating retailer: 43%
- ☐ Clipper automatically calculates the cost of your ride, including discounts and transfers: 41%
- ☐ After hearing the above, 70% said they were very or somewhat interested in using Clipper.