



# Business Plan Workshop #2

April 17, 2023

  
[bayferry2050.org](http://bayferry2050.org)

# Agenda

## RM3 Update

5 MINS

Overview  
Next Steps

## 2050 Service Vision

10 MINS

Review of Network  
Concepts  
Proposal

## Evaluation & Outreach Results

30 MINS

Evaluation Results  
Outreach Summary

## Next Steps & Discussion

60 MINS

Service Vision  
Optimization  
Service Vision Policy  
Statement  
Discussion



# Regional Measure 3 Update

# RM3 – Overview

- **Resolved in January 2023**
  - Too late to incorporate into service vision
  - Freed up \$300 million in capital and \$35 million annually in operating funding
- **Candidates for RM3 capital funds**
  - In-progress terminal expansion projects
  - Other initiatives (fleet expansion, emergency floats, zero emission infrastructure)

# RM3 – Next Steps

- **Business Plan**

- Future work will assume RM3 as a potential funding source
- Will help guide RM3 expenditure at the program-level
- Details of actual expenditures will be included in WETA's RM3 5-year plan

- **5-year RM3 expenditure plan**

- Legislation requires WETA submit a 5-year plan to MTC to access funds
- Currently in-progress (estimated completion June 2023)

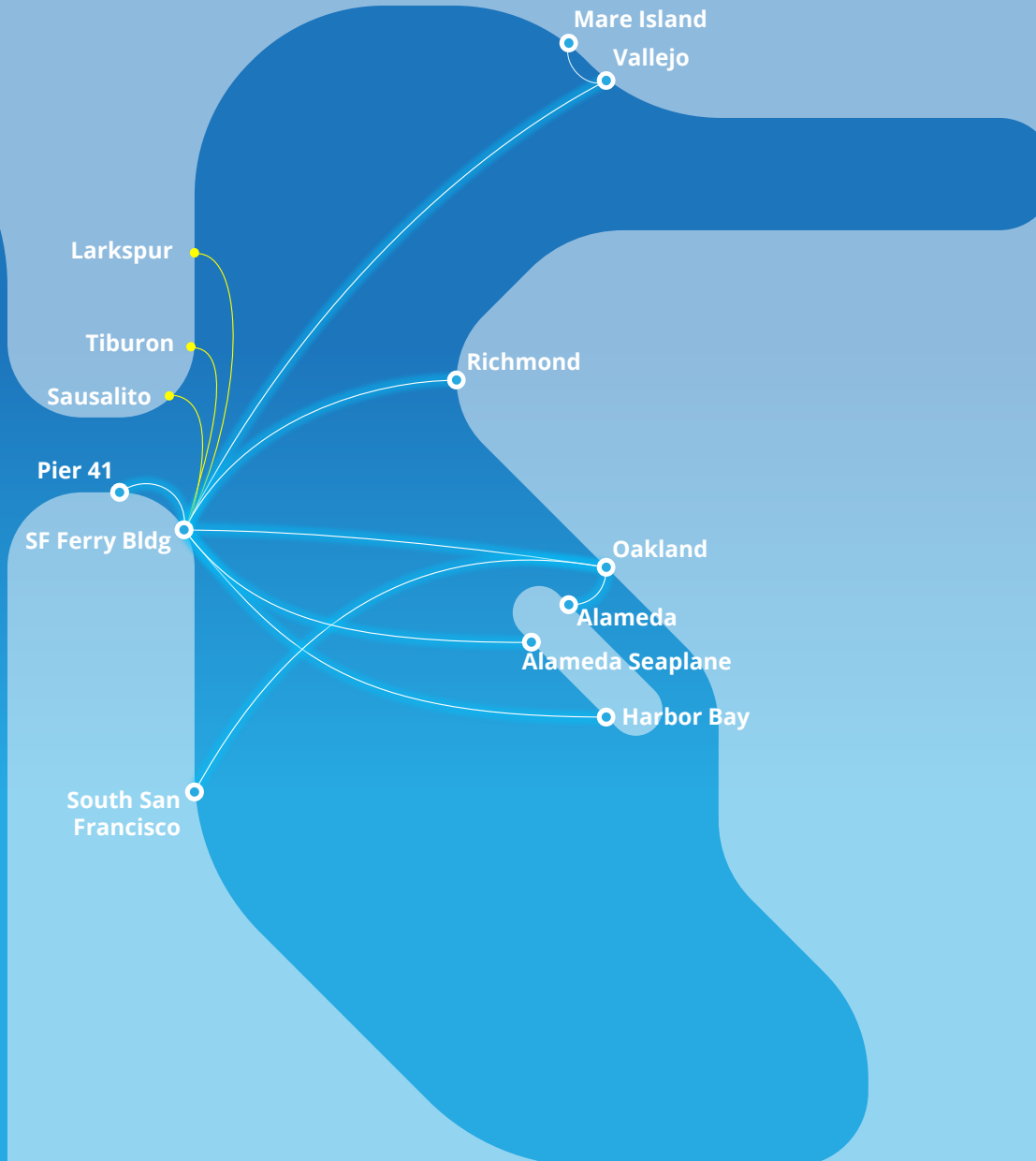
# 2050 Service Vision



# Current Baseline Network

## Network details

- 10 terminals
- 6 routes
- 16-26 vessels



NEW WETA EXISTING GGF EXISTING

Route



Terminal



Multiple options for terminal location



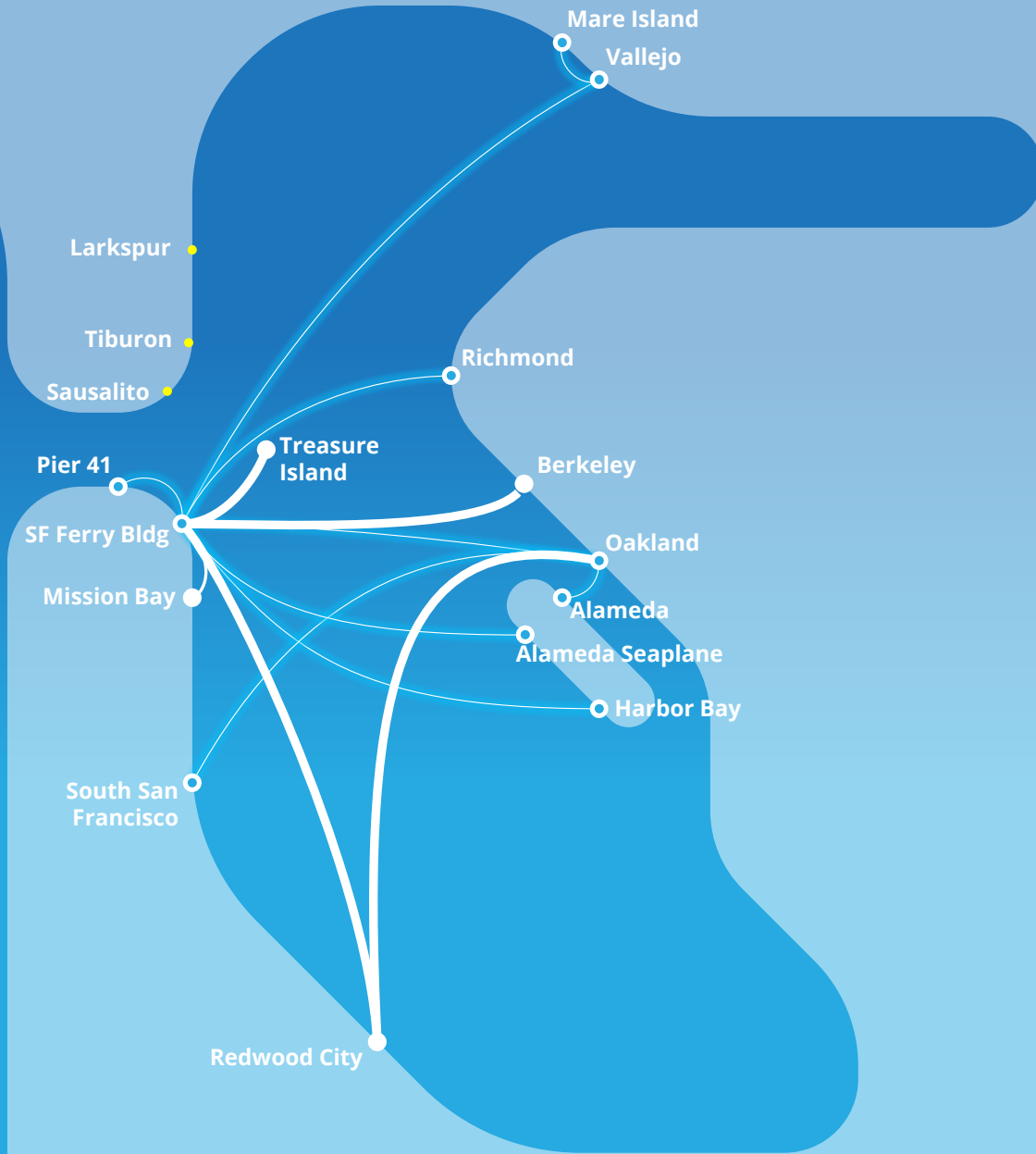
Special event service to AT&T Park and Chase Center not shown on map



# Plan Bay Area Network

## Network details

- 14 terminals
- 11 routes
- 22-42 vessels



NEW WETA EXISTING GGF EXISTING

Route



Terminal



Multiple options for terminal location



*Plan Bay Area includes regionally planned projects. Other expansion concepts are example networks.*

*Special event service to AT&T Park and Chase Center not shown on map*

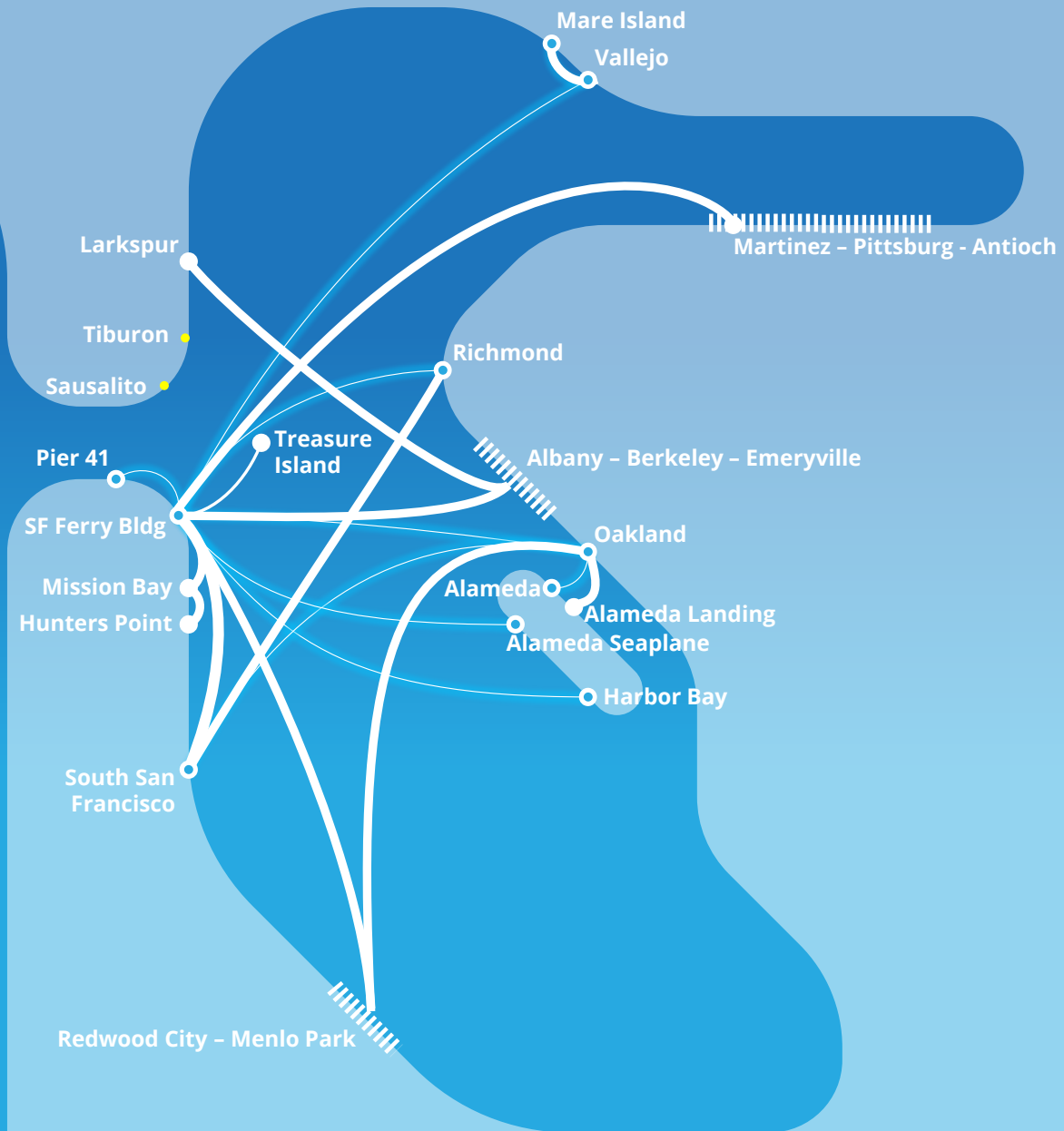




# Core Network

## Network details

- 18 terminals
- 17 routes
- 36-59 vessels



	NEW	WETA EXISTING	GGF EXISTING
Route			
Terminal			

Multiple options for terminal location



*Plan Bay Area includes regionally planned projects. Other expansion concepts are example networks.*

*Special event service to AT&T Park and Chase Center not shown on map*



# Coverage Network

## Network details

- 26 terminals
- 25 routes
- 67-87 vessels



Route  
Terminal

NEW  
WETA EXISTING  
GGF EXISTING

Multiple options for terminal location

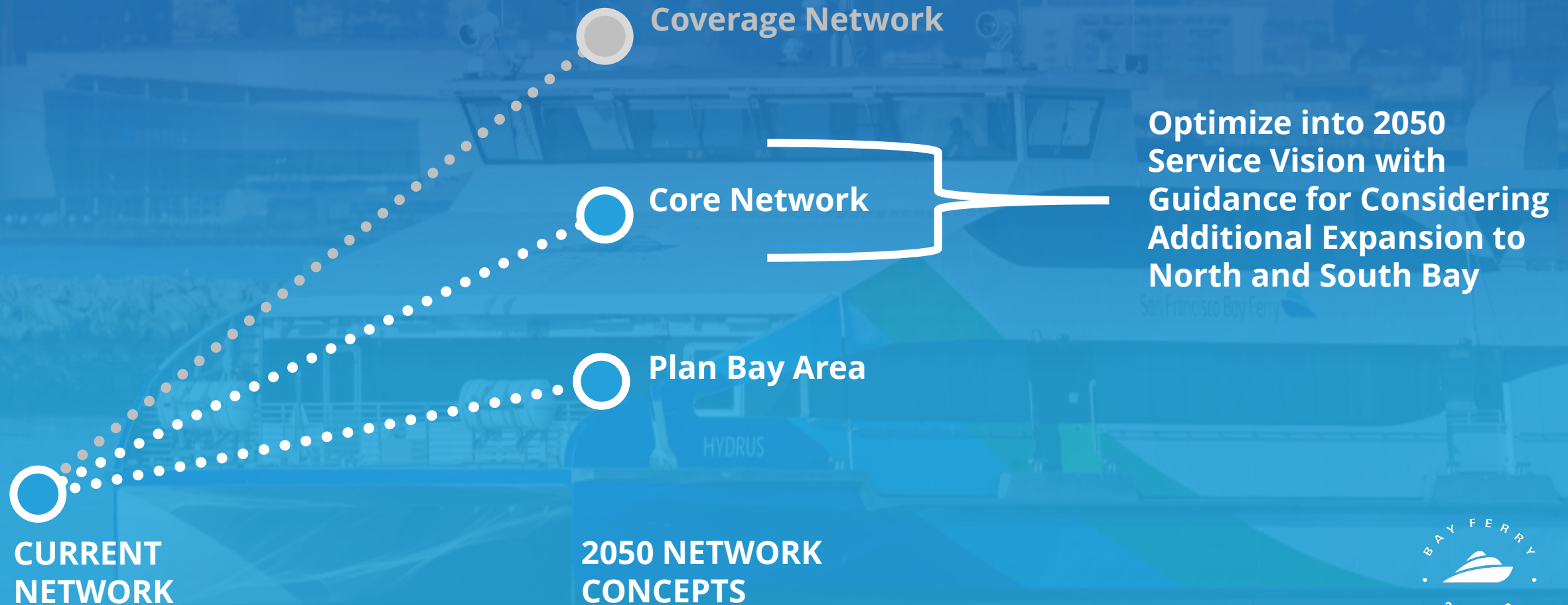
Special event service to AT&T Park and Chase Center not shown on map

Plan Bay Area includes regionally planned projects. Other expansion concepts are example networks.

Special event service to AT&T Park and Chase Center not shown on map



# Proposal for Finalizing the 2050 Service Vision

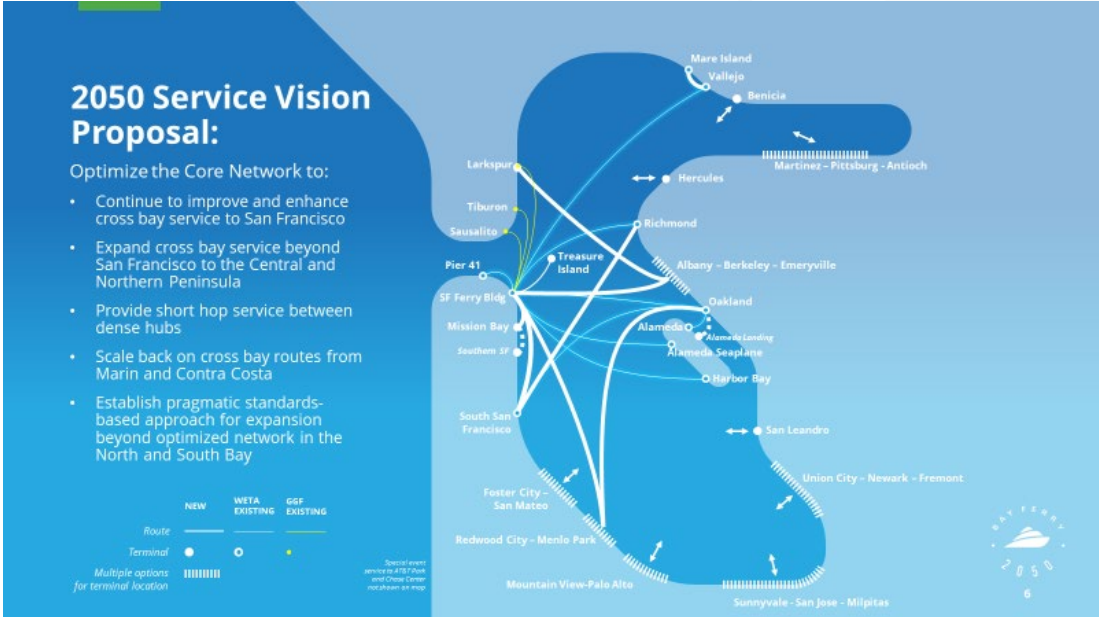


San Francisco Bay Ferry



# Service Vision Components

## Service Vision Network Map: "The Where"



## Service Vision Policy Statement: "What and How"

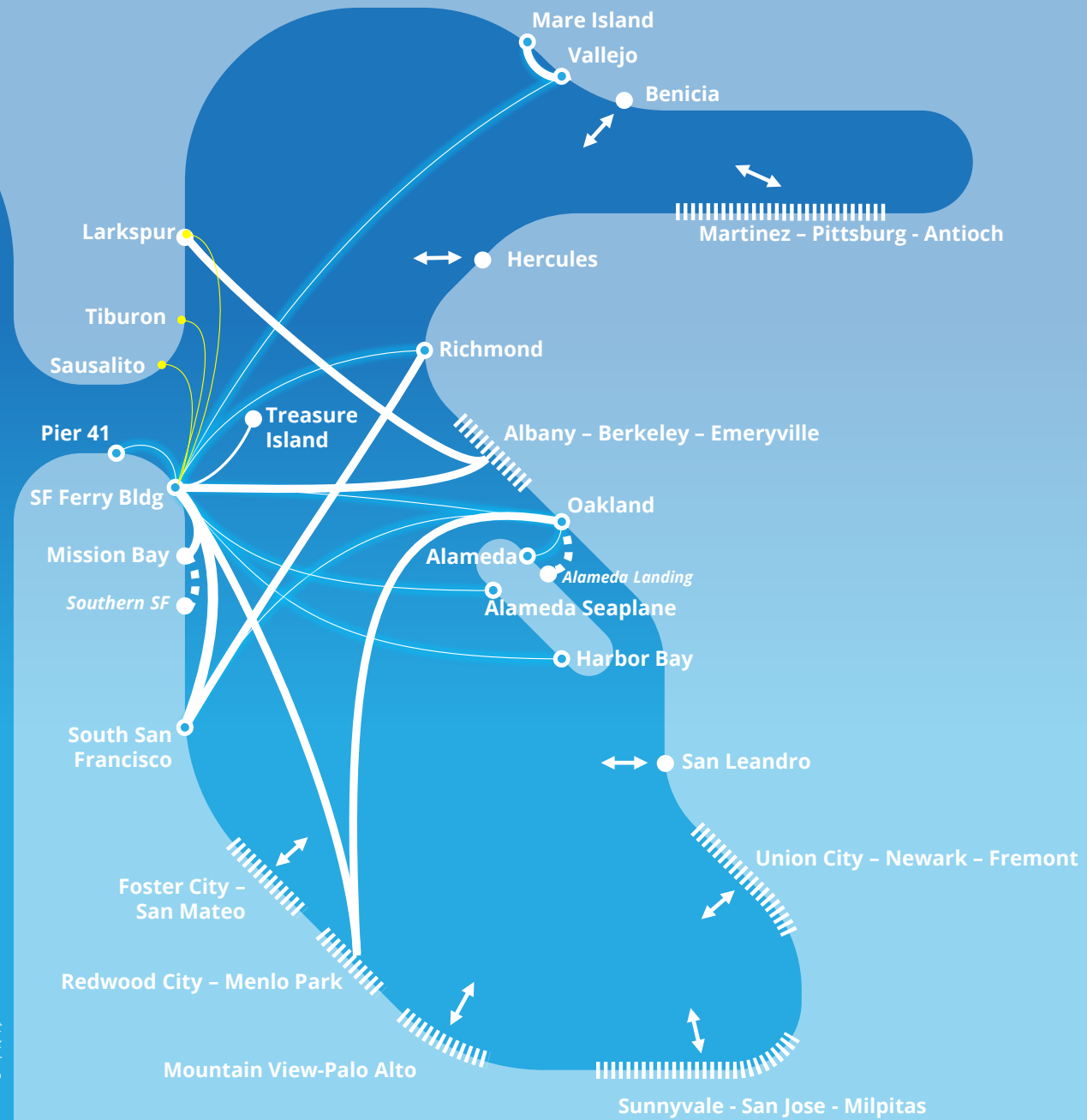
- Draft Service Vision Policy Statement Outline**
1. Summary statement about what the vision (for the Core Network) is and what goals it addresses
    - a. Statement describing the network (reference to a map or a list of routes or both?)
    - b. Statement one about the service approach and levels (service types and generally how operated)
      - i. Local
      - ii. Regional
      - iii. Special Event
    - c. Statement two about service approach (all day and weekend and/or commute focus)
    - d. Statement three about service approach and levels (general frequency)
      - i. Routes (or route characteristics) that would have the highest tier of frequency
      - ii. Routes that would have the middle tier of frequency
      - iii. Routes that would have the lowest tier of frequency
      - iv. Standard for moving a route into a higher frequency tier based on funding and or ridership
    - e. Statement about serving as an emergency responder?
    - f. Statement about how service vision will be implemented incrementally and refined through additional studies and engagement
      - i. Sub statement about electrification
      - ii. Sub statement about station access
      - iii. Sub statement about terminals
      - iv. Sub statement about fleet mix
      - v. Sub statement about storage and maintenance facilities?



# 2050 Service Vision Proposal:

Optimize the Core Network to:

- Continue to improve and enhance cross bay service to San Francisco
- Expand cross bay service beyond San Francisco to the Central and Northern Peninsula
- Provide short hop service between dense hubs
- Introduce cross bay routes to Marin County
- Establish pragmatic standards-based approach for expansion beyond optimized network in the North and South Bay



	NEW	WETA EXISTING	GGF EXISTING
Route			
Terminal			
Multiple options for terminal location			

*Special event service to AT&T Park and Chase Center not shown on map*



# Evaluation Results



# Network Concept Summary

All 2050 networks consider a substantial expansion of service in addition to new routes. Specific service plans vary by "Futures" resulting in a range of hours and costs for each network. Operating cost estimates are based on the current WETA service model and do not yet consider potential savings associated with electrification and small vessel deployment.

	Network Concept	Routes	Terminals	Peak Vessels	Annual Revenue Hours	Annual Operating Cost (\$2022)
2022	Existing	6	10	16	25K	\$62M
2050	Baseline	6	10	16-26	70-90K	\$100-\$130M
	Plan Bay Area	11	14	22-42	110-140K	\$160-\$210M
	Core	17	18	36-59	150-220K	\$200-\$280M
	Coverage	25	26	67-87	180-370k	\$240-470M



# Performance Compared to Existing 2050 Network

Focus Area	Topic	Plan Bay Area Network	Core Network	Coverage Network
<b>Regional Ferry Network</b>	Ridership	Light Green	Dark Green	Dark Green
	Productivity	Yellow	Orange	Red
	Transit Gaps Served	Yellow	Light Green	Dark Green
<b>Emergency Response</b>	Capacity	Light Green	Light Green	Dark Green
	Bay Bridge Capacity	Yellow	Yellow	Light Green
	Reach	Light Green	Light Green	Dark Green
<b>Env. Stewardship</b>	Zero Emissions	Orange	Orange	Red
	Wetland Effects	Yellow	Yellow	Red
	Dredging Effects	Orange	Orange	Red

Focus Area	Topic	Plan Bay Area Network	Core Network	Coverage Network
<b>Community Connections</b>	Service Area	Light Green	Light Green	Dark Green
	Equity Priority Communities	Yellow	Yellow	Dark Green
	Development Connections	Light Green	Dark Green	Dark Green
<b>Financial Capacity</b>	Subsidy	Orange	Orange	Red
	Operating Cost per Pax Mile	Orange	Orange	Red
	Capital Cost	Grey	Grey	Grey





# Findings for Expansion Beyond Plan Bay Area

## Expansion Increases Ridership, Capacity, and Connectivity

Expanding the region's ferry network supports a more accessible ferry network with a broader reach for mobility and emergency response needs.

## Expansion Can Produce Diminishing Returns

Productivity and financial effectiveness tend to decline as more routes are added, while operating subsidy increases substantially. Markets with the highest concentration of demand are already mostly served by ferries and regional transit.

## Expansion Can Result in Environmental Challenges

Some routes and terminals present substantial environmental constraints - adversely affecting wetlands, requiring substantial dredging, and limiting the use of zero emissions vessels.

# Rationale for Optimized Core Network Service Vision

- **Regional Ferry Network**
  - Increases ridership
  - Serves gaps in the regional transit network
- **Emergency Response**
  - Expands fleet and terminal capacity
  - Expands regional ferry access
- **Environmental Stewardship**
  - Minimizes new terminals that impact sensitive wetlands and wildlife areas
  - Minimizes new terminals that would require significant volume of dredging
  - Emphasizes routes with clear path to zero emissions vessels

# Rationale for Optimized Core Network Service Vision (cont.)

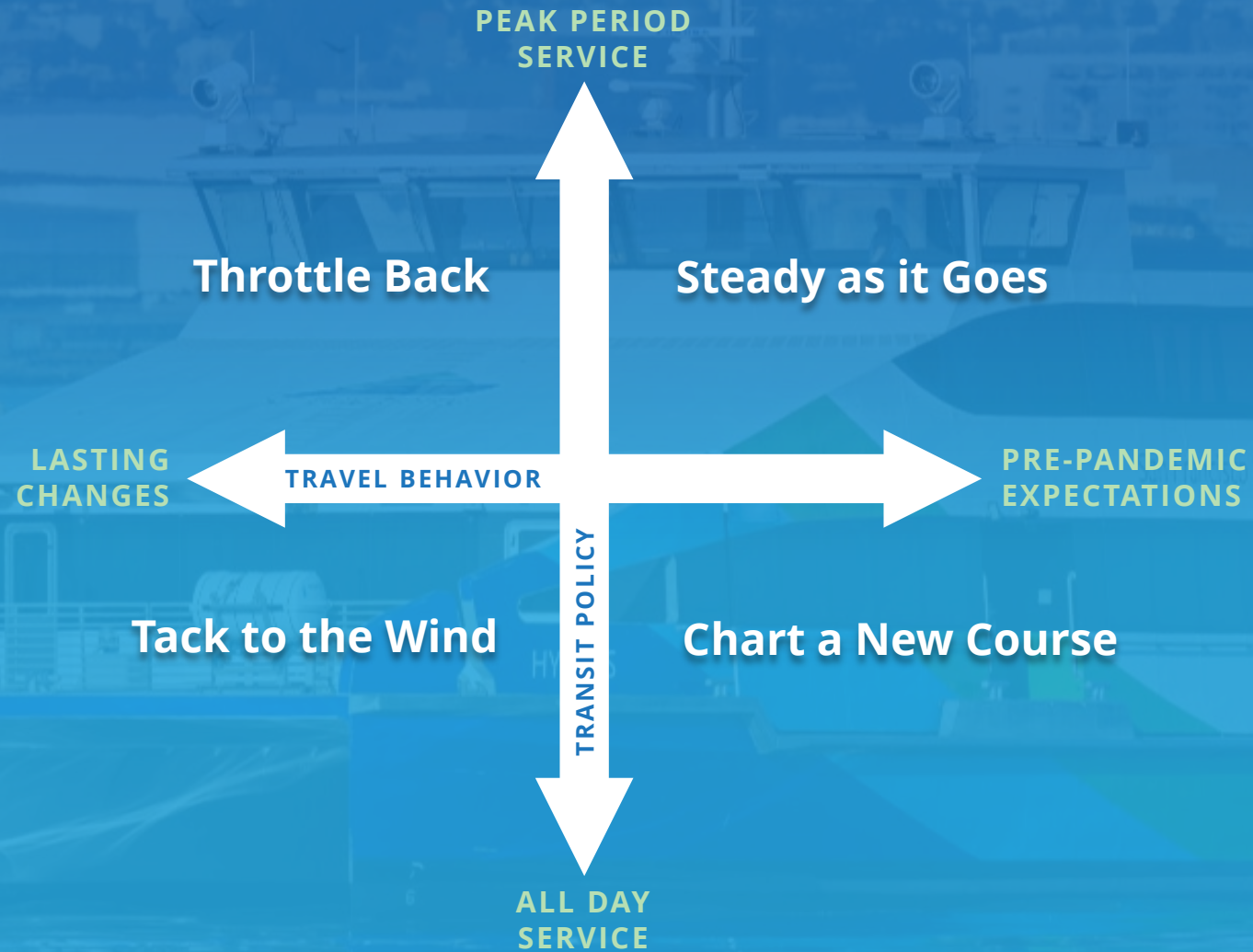
- **Community Connections**

- Expands connections to new communities and markets
- Serves additional Equity Priority Communities and Priority Development Areas

- **Financial Capacity**

- Incrementally increases operating subsidy
- Mitigates higher cost per passenger by incorporating smaller vessels on local and lower demand routes
- Minimizes capital costs by leveraging existing terminals to create new routes

# 2050 Futures



# Resilience – Key Takeaways

Ferry networks generally perform best in Chart a New Course and Tack to the Wind futures

- **Plan Bay Area** is the most productive and most cost-effective network under all futures
- **Coverage Network** has the highest ridership but requires the most subsidy under all futures
- **Core Network** falls in the middle in terms of performance in all futures

# Potential Expansion Beyond Core Network

## Market Conditions

Transformative changes in housing and employment patterns, as well as the regional transportation network.

## Environmental Feasibility

Evolving vessel technologies and changes in local land use or shoreline conditions.

## Funding Opportunities

Future sources of currently unanticipated public or private funding become available.

# Public Outreach



# Current Outreach and Engagement Activities

- CBO Listening Sessions**  
January 5 – 31, 2023
- Business Advisory Group**  
January 18, 2023
- Community Advisory Group**  
January 25, 2023
- Online Community Survey**  
January 25 – March 24, 2023
- County Working Groups**  
February 8 – 23, 2023

**WETA Board Workshop**  
April 6, 2023  
*Present findings from community engagement*

18 total meetings this round

**Final Service Vision**  
June 2023





# CBO Listening Sessions

## 9 Sessions

- All Home California
- Calle 24
- Five Keys
- Martinez Community Foundation
- Multicultural Institute
- Palo Alto TMA
- PODER
- Ryse Center
- Samaritan House San Mateo

## Key Feedback

- To reach lower-income communities, meet people at the places they frequent
- Promote using flyers, other physical collateral
- Use paper surveys instead of online
- Offer incentives for participation, “this is a dealbreaker” for many orgs

## Future Considerations

- Provide free opportunities for Bay Area youth to experience the ferry
- More intentional campaign to change the perception that ferry is too expensive



# Advisory Groups

## Consider key tradeoffs

- *Environmental stewardship vs. expanding coverage:* Trust WETA to handle environmental issues responsibly
- *Service coverage vs. cost effectiveness:* Potential for increased ridership is too important not to pursue coverage

## Remain open to future technologies

- They can change the way we handle dredging, wetlands, vessel strikes, and long-haul routes, etc.
- Anticipate all routes will be feasible at some point in the future

## Access is key to increasing ridership

- Access, equity and growth are all tied together
- Make it easier for all people to use the ferry
- Landside, first/last mile will be key factor of success



# Six County Working Groups

## Alameda County

- Alameda County Transportation Authority
- Alameda
- Berkeley
- Oakland
- San Leandro

## Solano County

- Solano Transportation Authority
- Vallejo
- Benicia

## City and County of San Francisco

- San Francisco County TA
- SFMTA
- Port of SF
- TIDA
- SF Mayor's Office

## San Mateo County

- San Mateo County TA
- SamTrans
- South San Francisco
- Redwood City
- Foster City
- Port of Redwood City

## Contra Costa County

- Contra Costa Transportation Authority
- WCCTAC
- Richmond
- Hercules
- Martinez
- Antioch

## Santa Clara County

- VTA
- Palo Alto
- Mountain View
- Milpitas



# County Working Groups

## Environment

Weary of expansion requiring significant environmental impacts to sensitive or protected shoreline areas.

## System Productivity

Expansion without efficiency is a disservice to the entire system's operations and funding.

Maintain and enhance the existing system's high-performing core routes.

## Delivery Flexibility

Allow for greater flexibility in WETA's project delivery model. Smaller vessels or alternative operating agreements can allow more communities access to ferry transit.

# Online Public Survey

4,568 responses

JAN 30 - MARCH 24

- Six questions about future ferry system trade-offs
- How to balance...
  - Affordability
  - Service frequency
  - Service speed
  - Coverage
  - Environmental sustainability

### Bay Ferry 2050 Public Survey

[f](#) [t](#) [in](#) [e](#)

San Francisco Bay Ferry is exploring how best to serve Bay Area residents in the years to come. How should the ferry system balance affordability, service frequency and speed, expansion, and environmental sustainability to be a mode of transportation you use and trust?

Take this survey to tell us what is most important to you and your household, and enter to win a \$50 Clipper Card or a San Francisco Bay Ferry water bottle at the end of the survey. The survey takes less than 10 minutes to complete. We appreciate your time and opinions to help guide San Francisco Bay Ferry's future.

**SURVEY**


---

#### Survey

*Participation in this survey is voluntary. The survey includes questions about travel behavior and demographics. Information provided in the survey will be used to evaluate San Francisco Bay Ferry products and services. Data will be reported in aggregate. The San Francisco Bay Ferry takes appropriate precautions to protect respondent-provided information and keep data secure. One winner of a \$50 Clipper Card and 15 winners of a San Francisco Bay Ferry water bottle will be selected at random.*

[Take Survey](#) [f](#) [t](#) [in](#) [e](#)

**HELP SHAPE THE FUTURE OF WATER TRANSIT**



**FILL OUT THE SURVEY**  
**WIN A \$50 CLIPPER CARD**  
**BAYFERRY2050.ORG**

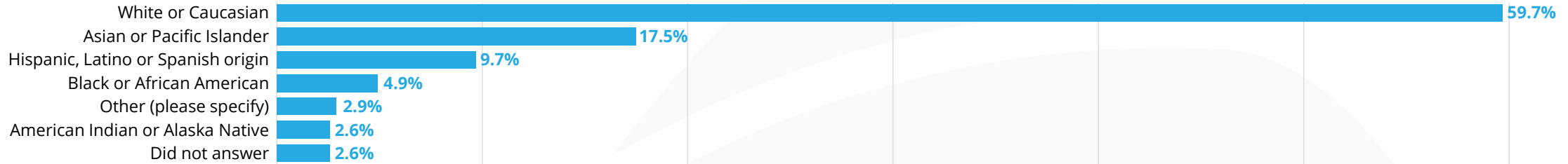
**简体中文**

**Español**

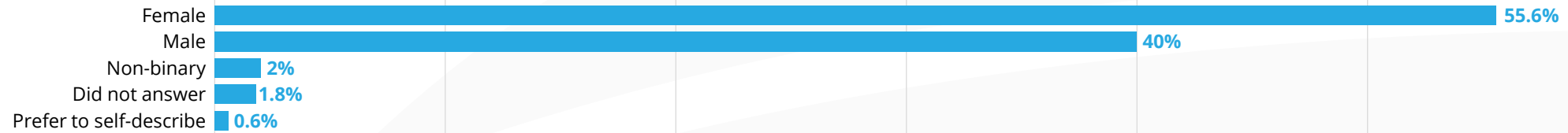


# Who Did We Hear From?

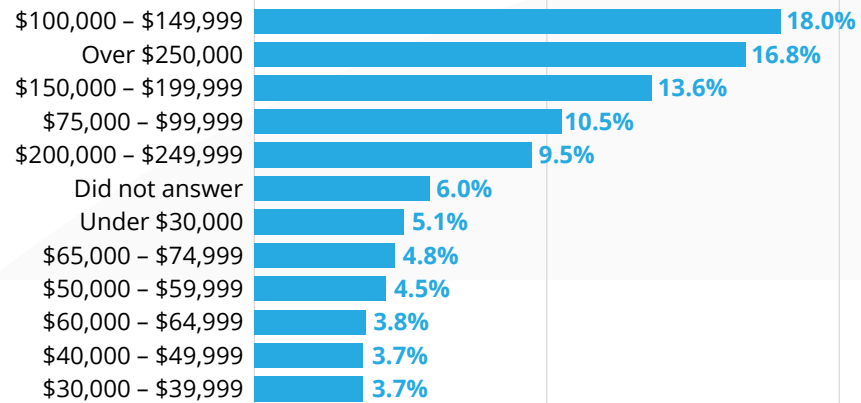
## Race



## Gender



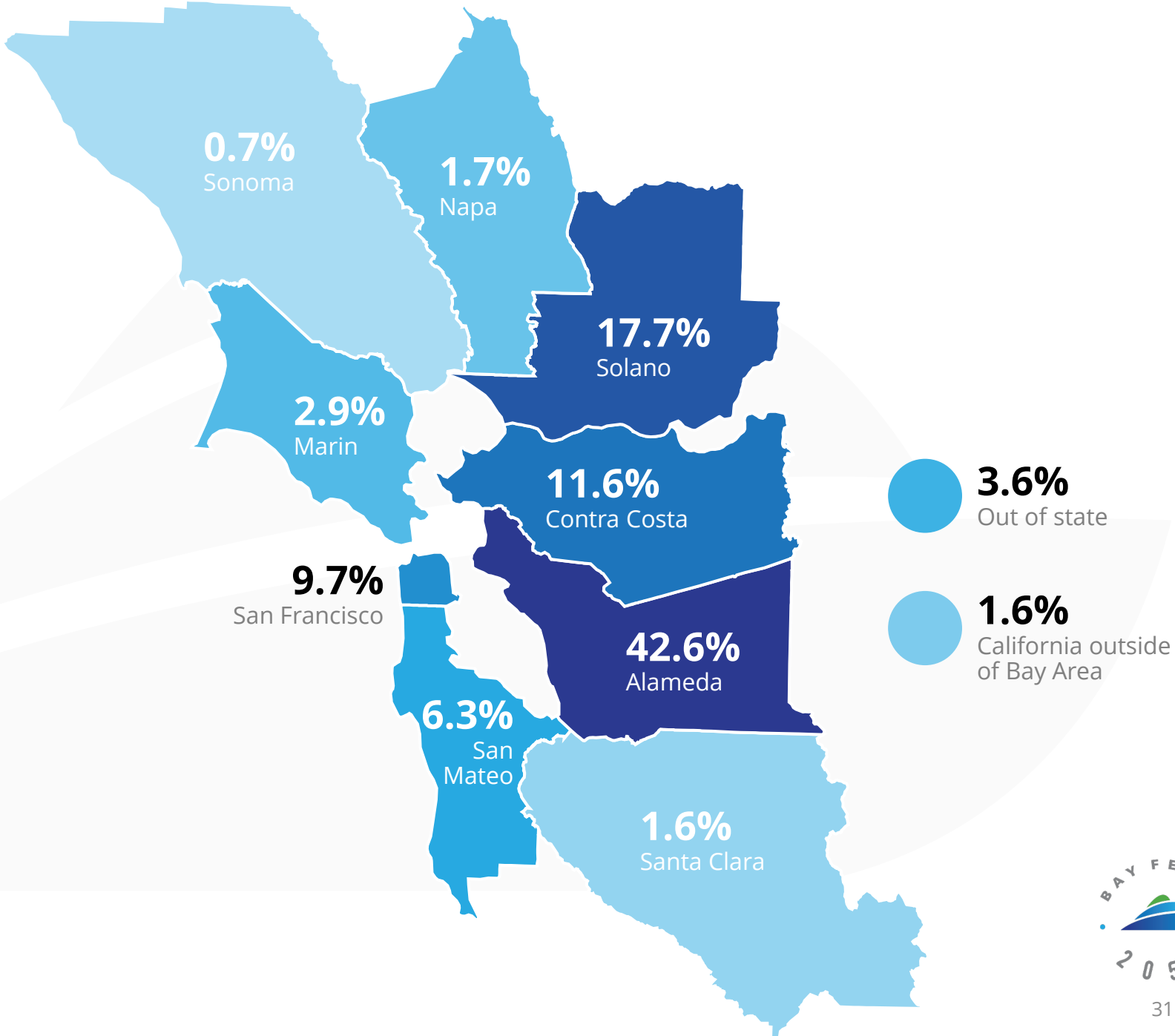
## Income



0% 10% 20% 30% 40% 50% 60%



# Responses by County



# Top Survey Takeaways

## Trip Frequency is Priority

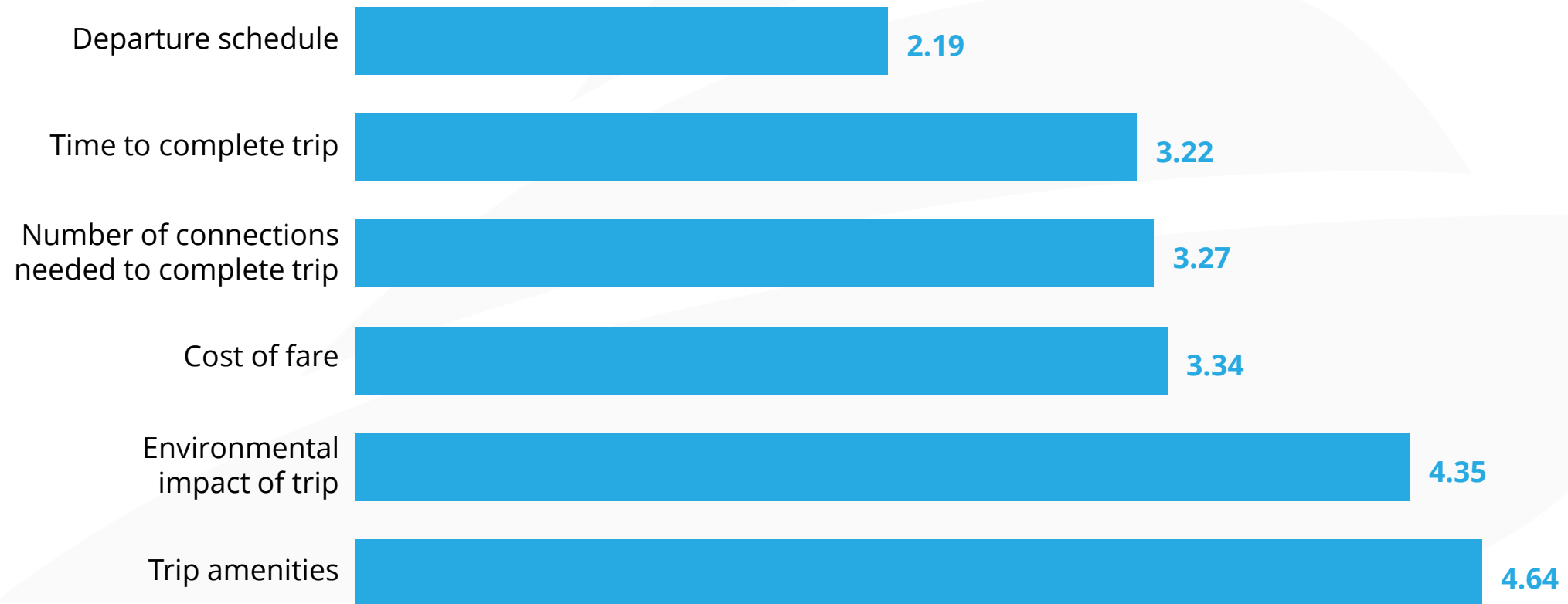
A majority of respondents ranked “increased trip frequency” as a reason to take the ferry more often

## Secondary Concerns

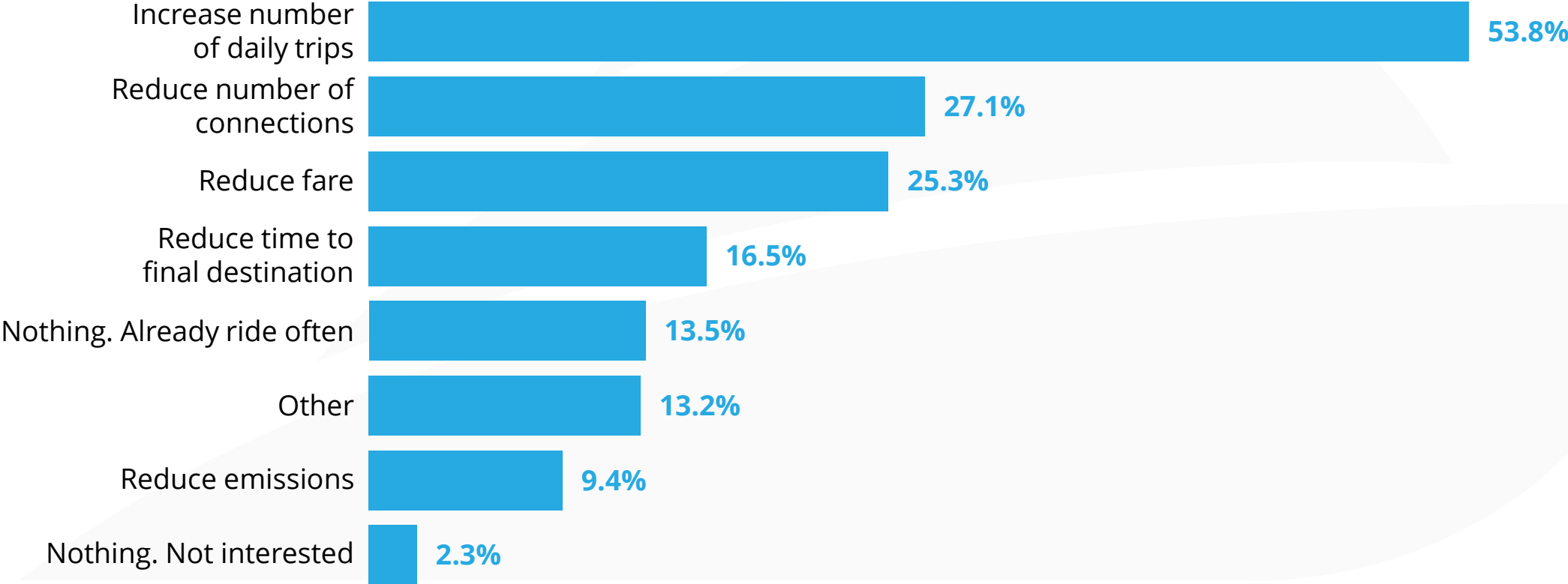
- Transit connections
- Travel time
- Cost



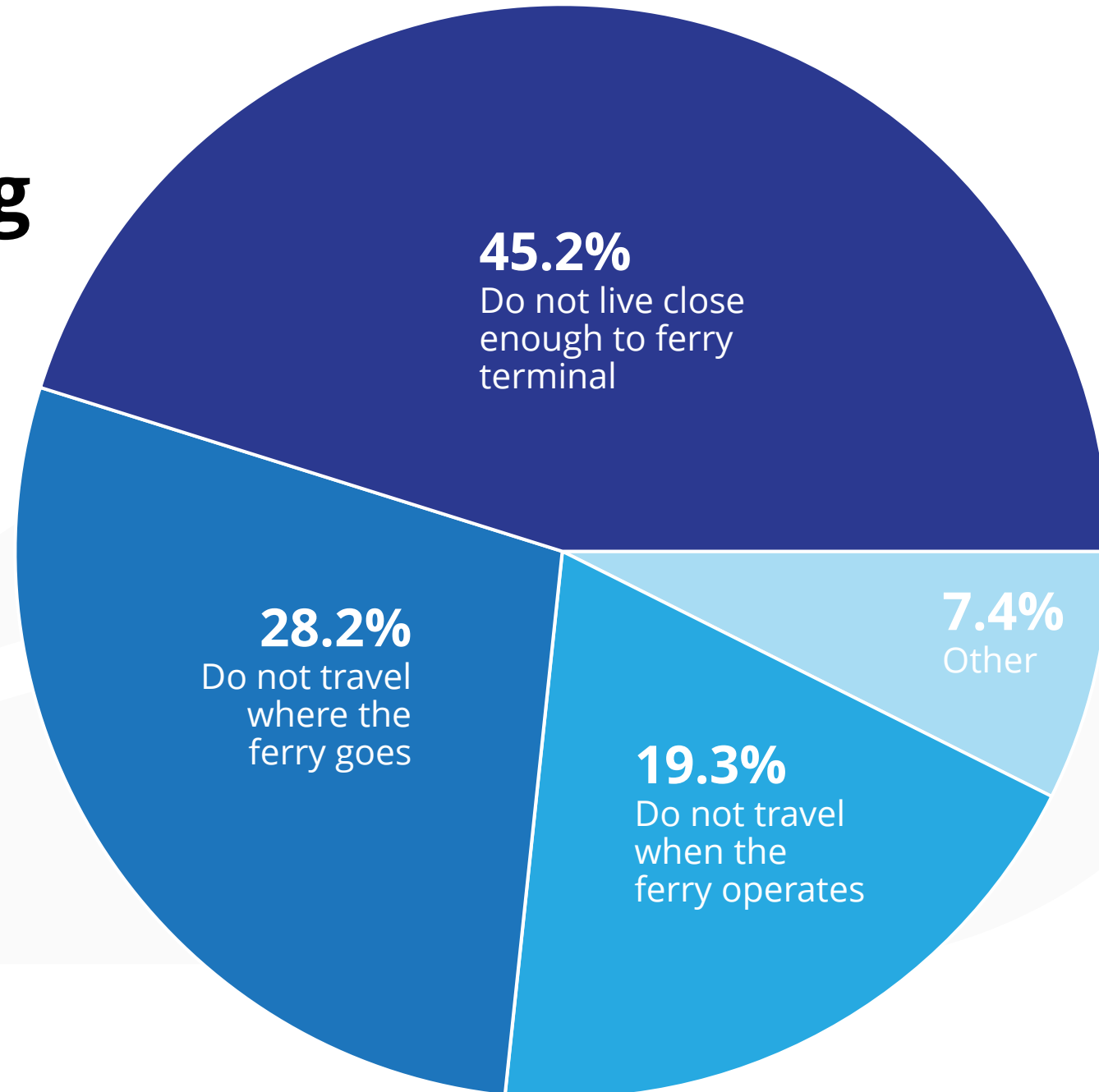
# Most Important Factors When Deciding Whether to Take the Ferry



# Services Changes that Would Most Influence People to Ride the Ferry More Often

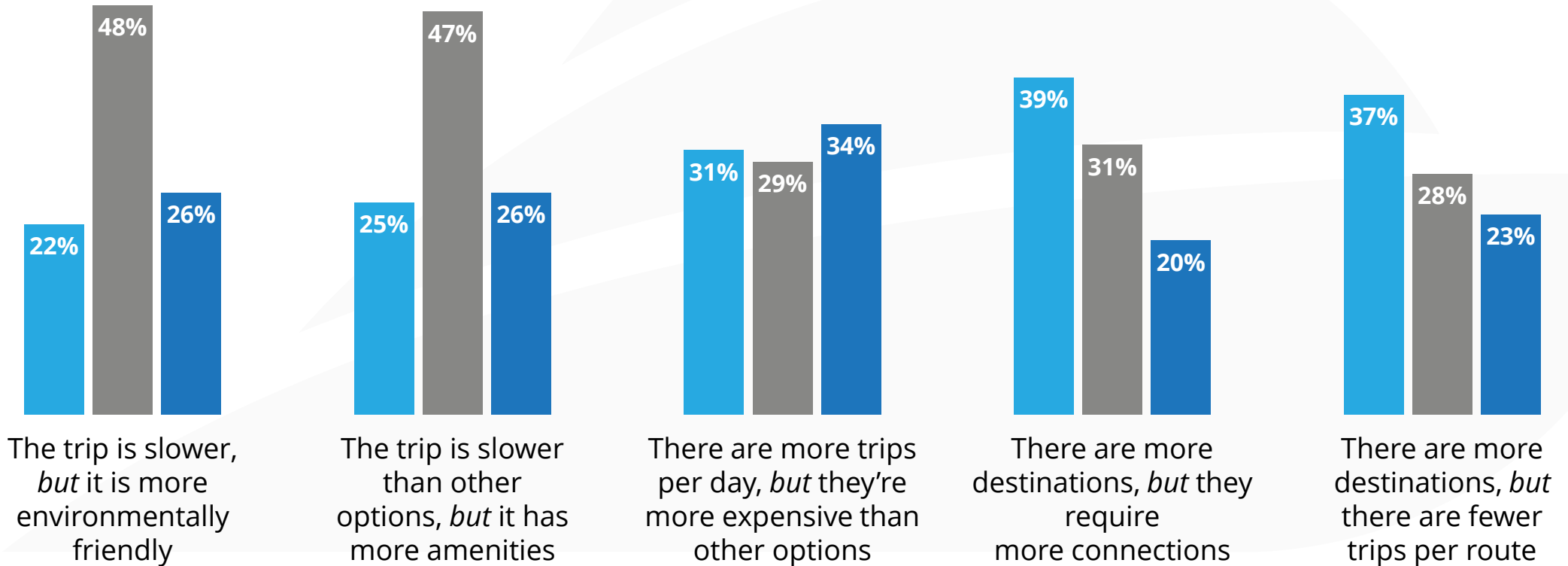


# Top Reasons for Not Taking the Ferry



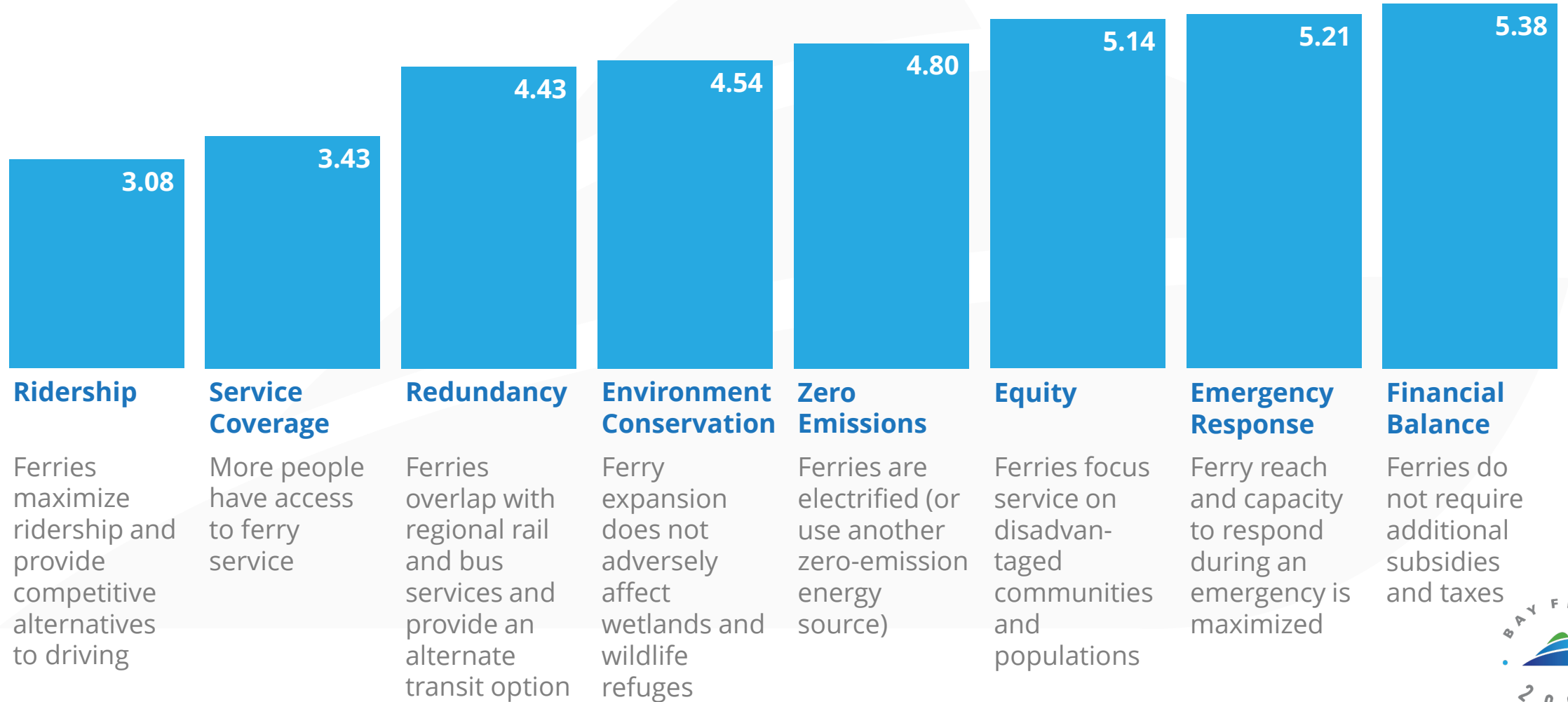
# Likelihood of Riding the Ferry if...

● Less likely   ● No difference   ● More likely



# Most Important 2050 Ferry Service Outcomes

*1 - most important; 8 - least important*



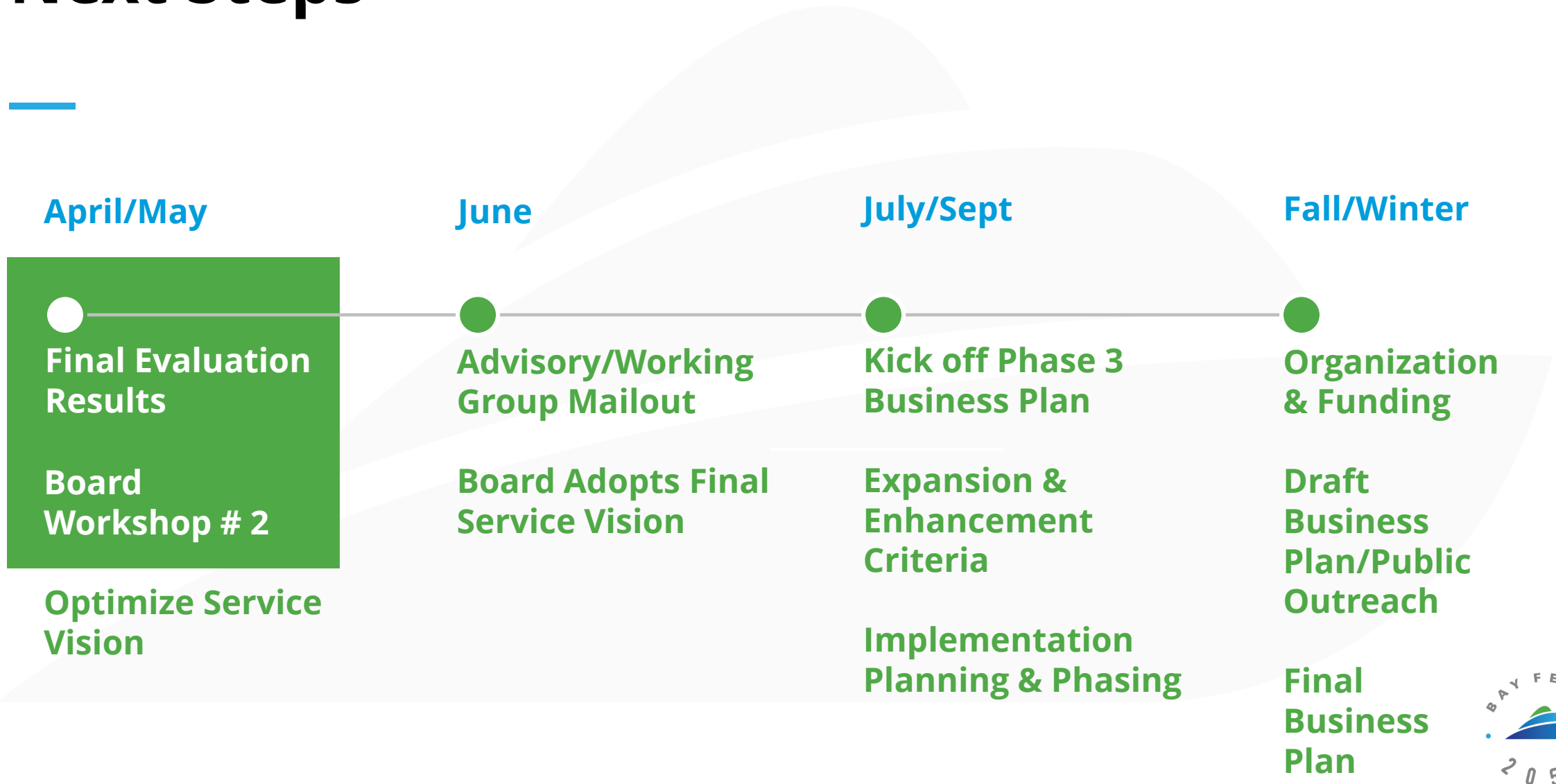
# Discussion



# Next Steps



# Next Steps





# Draft Service Vision Policy Statement

- Describe the **high-level vision and service approach** and key implementation and network refinement activities that will shape delivery of specific routes and terminals
- Provide guidance as to **WETA's role in consideration of expansion** beyond Core Network in North and South Bay
- Describe actions that staff will take to **advance the Service Vision** (e.g. finish the Business Plan, evolve the organization, pursue funding)
- Describe how often and under what circumstances Service Vision will be updated

# Implementing the 2050 Service Vision

Implementation of the Service Vision will not necessarily follow a linear path. In Phase 3 of the process, the Business Plan will develop specific criteria to advance new routes and terminals, consider phasing and assess organizational, partnership, and funding needs for the selected Service Vision.



THANK YOU

Bay Ferry 2050 microsite

[bayferry2050.org](http://bayferry2050.org)

WETA staff contacts

Mike Gougherty [Gougherty@watertransit.org](mailto:Gougherty@watertransit.org)

Gabriel Chan [Chan@watertransit.org](mailto:Chan@watertransit.org)

