



Presentations for Nov. 14, 2024 Board of Directors Meeting





Item 5a(3): MV Karl Update





Item 5f: Quarterly Review of Capital Program

Capital Program Quarterly Report

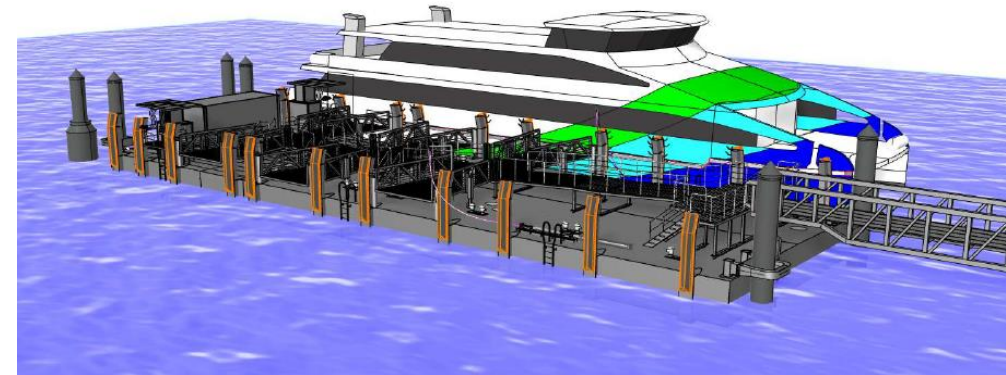
FY 2024/25 Period Ending September 30, 2024



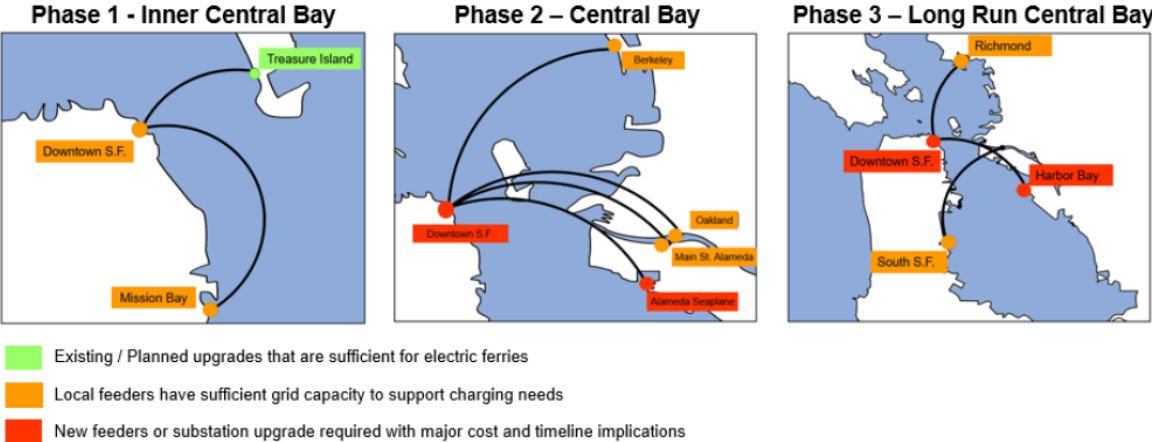
San Francisco Bay Ferry

PERFORMANCE SUMMARY

- Increased Funding (FTA, EPA, TIRCP, Etc.)
- Restructured and Increased Capital Program Organization
- Enhanced Project Management Approach
- Continued Repair and Replacement Projects
- Assessed Proposals for the Battery-Electric Vessels
- Developed Universal Charging Floats
- Advanced Terminal Electrification Work
- Strengthened the Project Controls System
- Implemented a Risk Management System
- Faced Current Industry Challenges



CAPITAL PROGRAM



Program

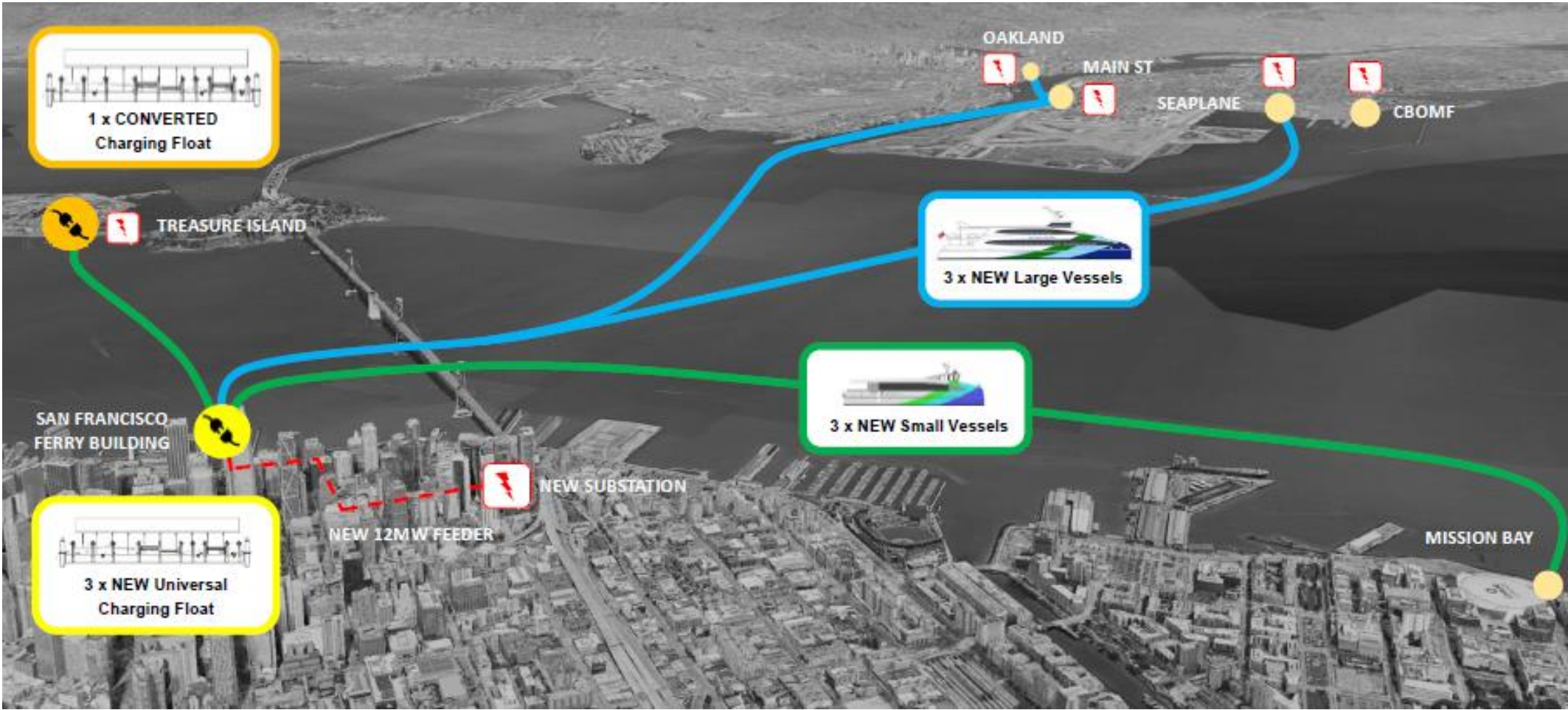
Planning Projects

- Downtown SF
- Mission Bay
- Oakland
- Main Street
- Berkeley
- Harbor Bay
- South SF
- Richmond
- Redwood City

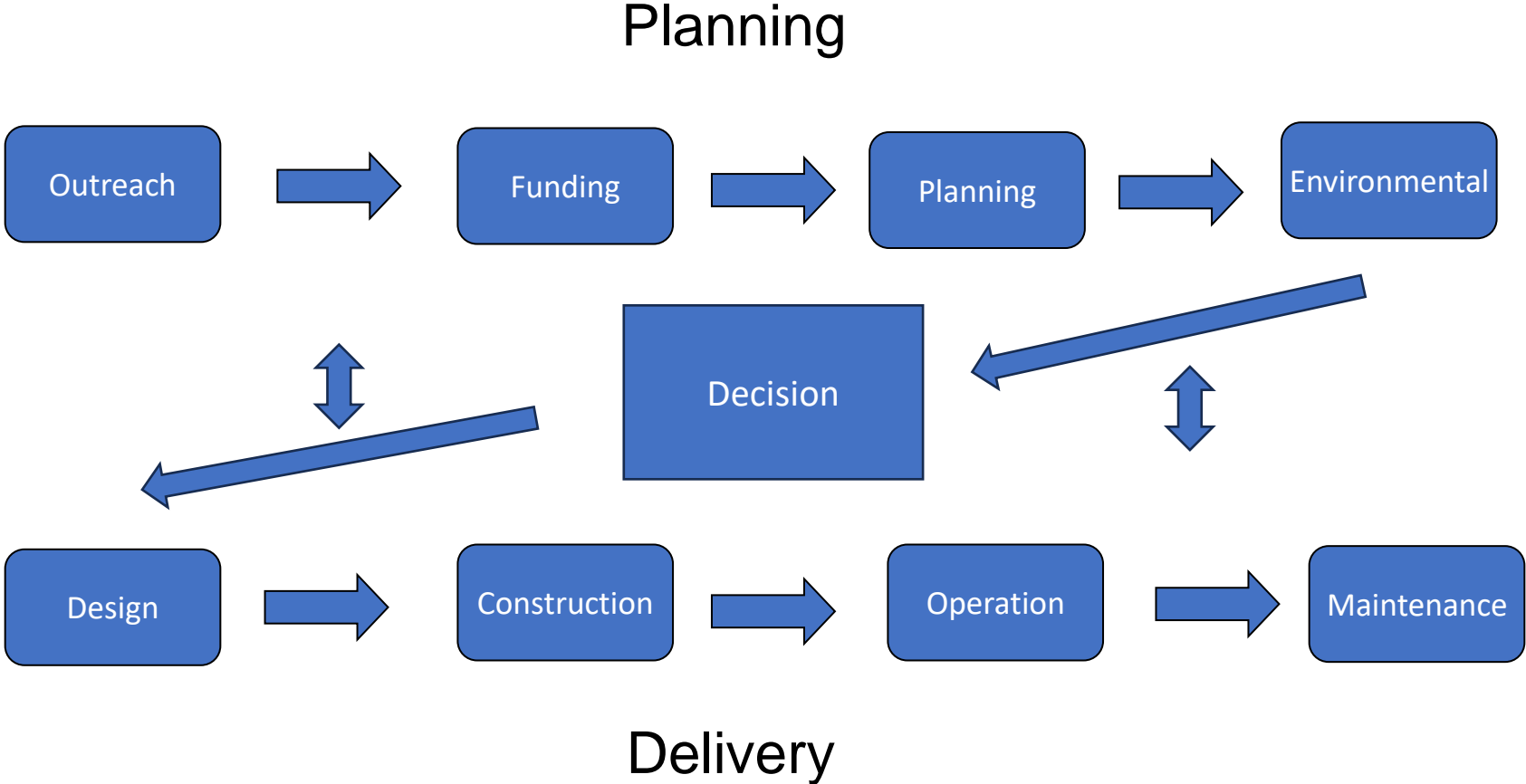
Delivery Projects

- Repair & Replacement
- 150 Pax Vessel
- 400 Pax Vessel
- Universal Charging Float
- Charging Float Retrofits
- Treasure Island
- Seaplane
- Vallejo
- Etc.

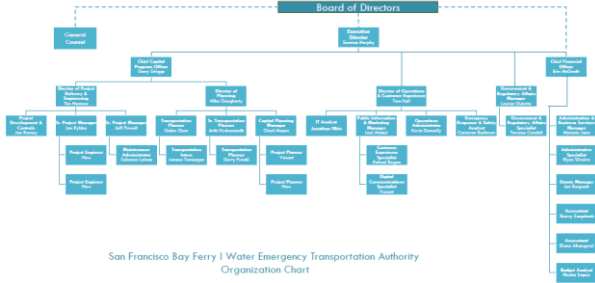
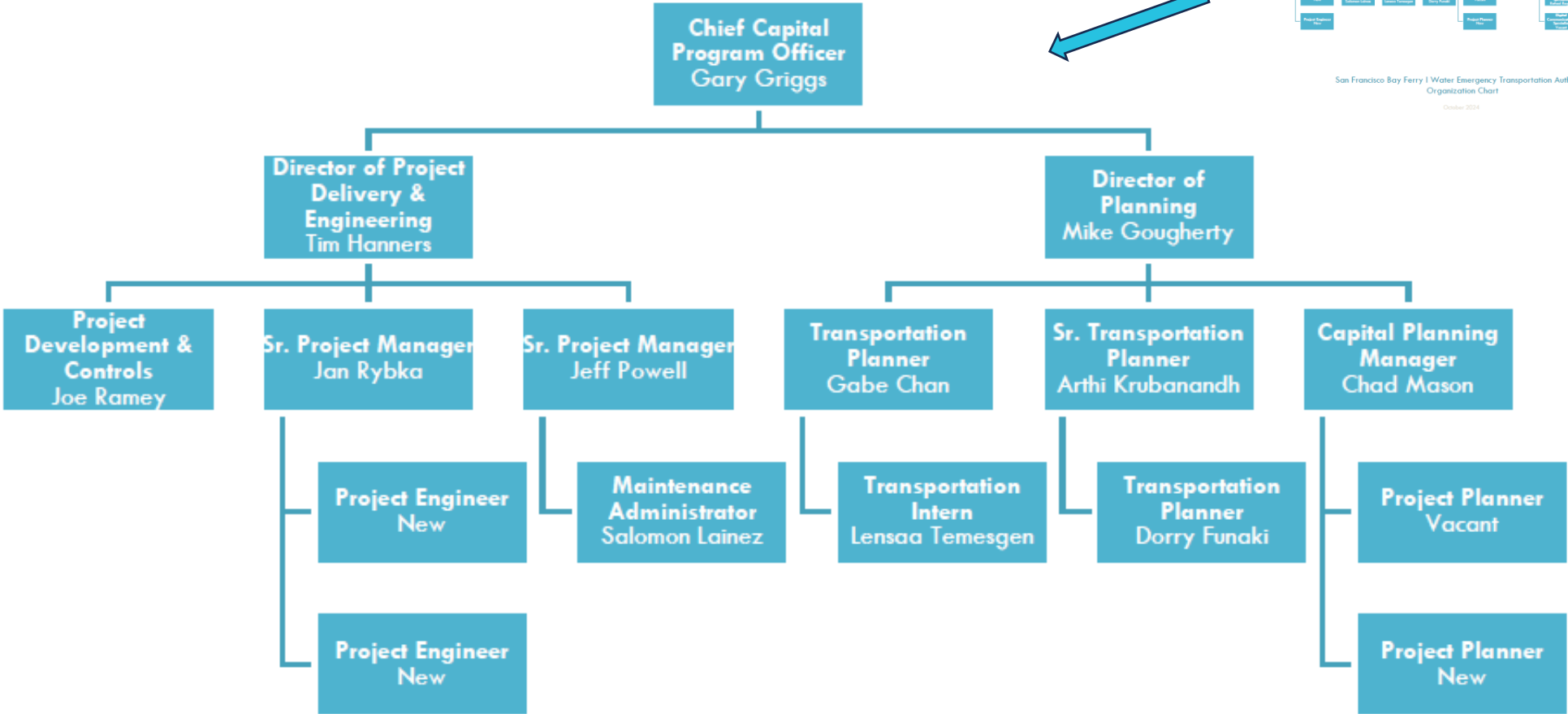
PHASED PROGRAM DELIVERY APPROACH



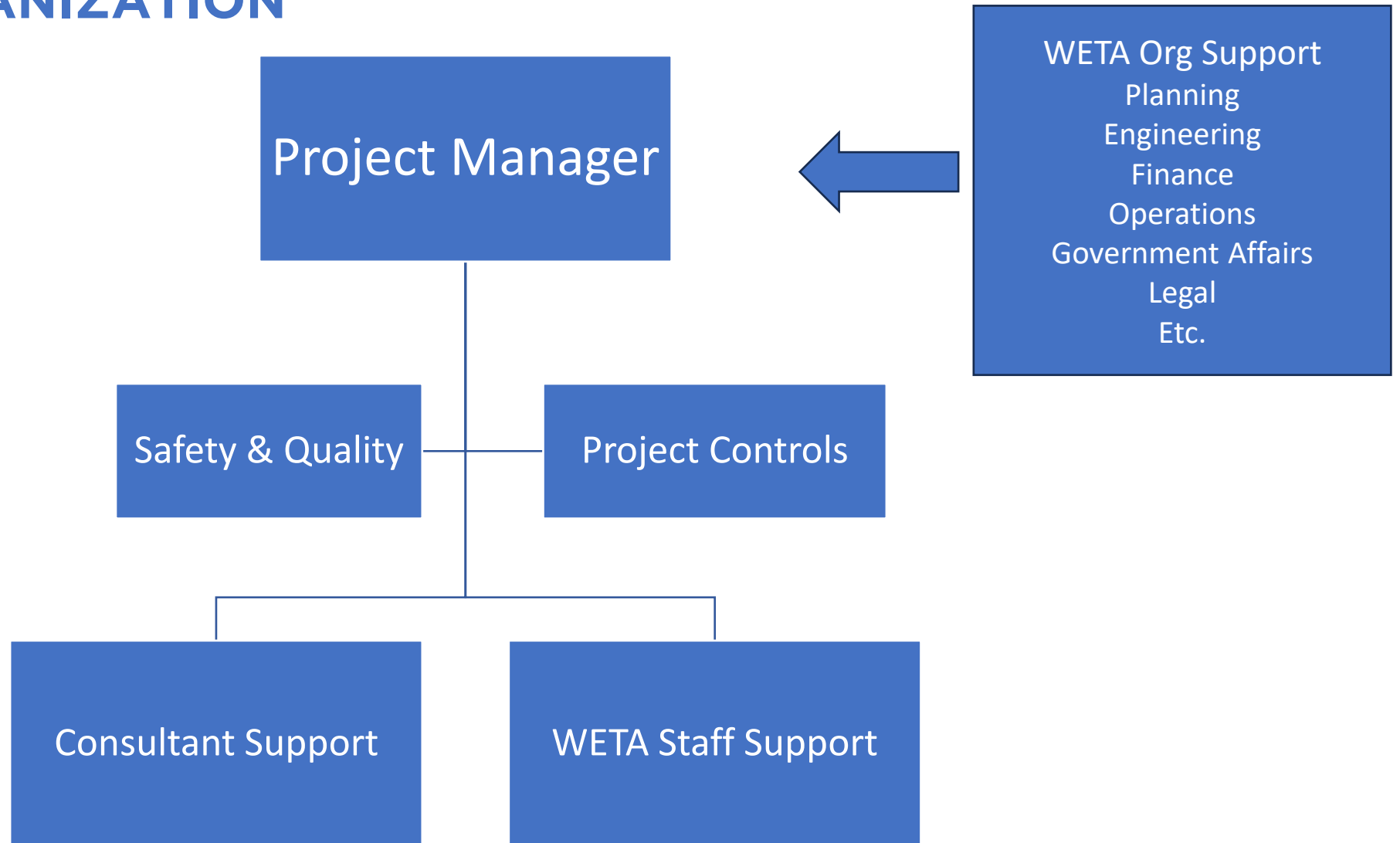
PROJECT PHASES



CAPITAL PROGRAM ORGANIZATION

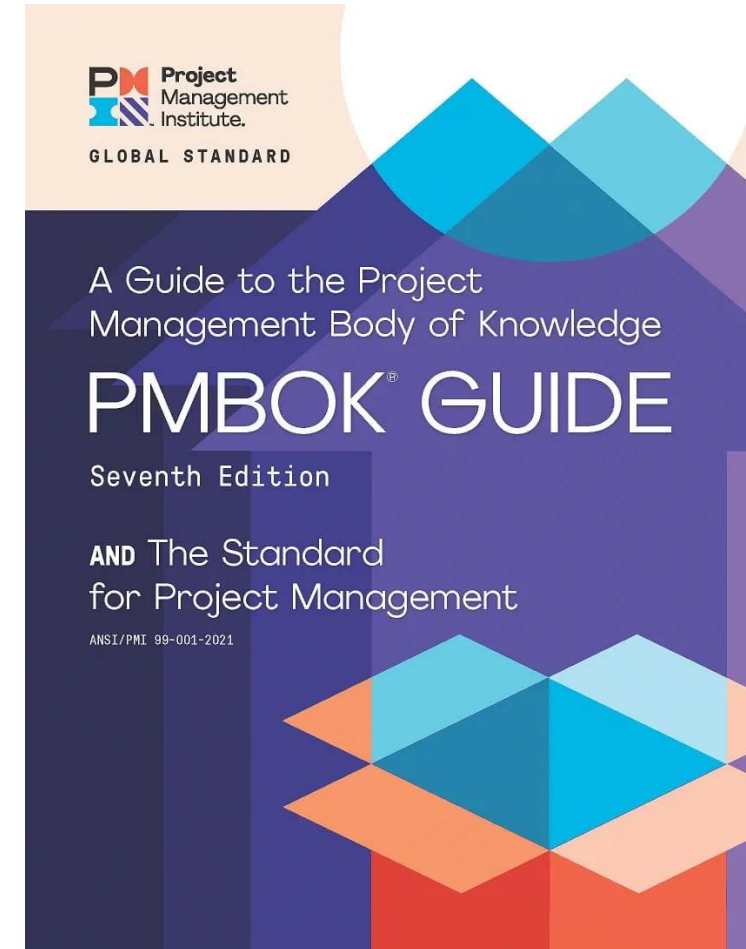


PROJECT ORGANIZATION



PROJECT MANAGEMENT (PMI PMBOK®)

- Accepted Best Practices and Guidelines
- Performance Based Perspective
 - ❖ Safety, Quality, Risk
 - ❖ Scope, Schedule, Cost
 - ❖ Contingency, Integration, Interfaces
 - ❖ Resources, Communications, Transparency
- Plan the Work and Work the Plan



SCHEDULE PERFORMANCE

Calendar Year	2024	2025	2026	2027	2028	2029	2030
Maintenance Projects	—————						
Electrification (REEF)	—————						
• Small Vessel	—————						
• Large Vessel	—————						
• Facilities	—————						
○ Treasure Island	—————						
○ Mission Bay	—————						
○ Downtown	—————						
○ Other	—————						

COST PERFORMANCE

Project	Budget Estimate	Committed to Date	Expended to Date	Budget Remaining	Projected
Vessel Projects	\$	\$	\$	\$	\$
High Speed (Dorado/Delphinus)	30.4	30.4	30.2	0.2	*TBD
Replacements (Karl/Zalophus)	37.9	37.9	23.9	14.0	*
Repair and Replacement Program: Vessels	\$	\$	\$	\$	\$
Midlife Refurb/MV Gemini	4.5	4.5	0.0	4.5	*
Waterjet Upgrade/Pyxis	0.7	0.7	0.2	0.5	*
Midlife Refurb/Engine Overhaul	4.7	4.7	0.0	4.7	*
Waterjet Equipment	0.9	0.9	0.2	0.7	*
Engine Overhaul/Improve	9.4	9.4	0.3	9.1	*
Component Improve/Dry Dock	3.4	3.4	0.7	2.7	*
Repair and Replacement Program: Facilities	\$	\$	\$	\$	\$
Vallejo Terminal Reconfiguration	16.7	16.7	0.5	16.2	*
Floats Rehab – Pier 9	1.4	1.4	0.0	1.4	*
Vallejo Terminal Dredging	3.5	3.5	0.0	3.5	*
Parking Lot - SSF	0.2	0.2	0.0	0.2	*
NOBMF Fuel Farm Upgrades	0.4	0.4	0.0	0.4	*
Mare Island/Pier 9 Office	0.6	0.6	0.0	0.6	*
Multiuse Emergency Float	0.2	0.2	0.0	0.2	*
Electrification Program (REEF)					
Vessels	\$	\$	\$	\$	\$
New Electric (3-150PX)	31.3	31.3	0.5	30.8	*
New Electric (400PX/Intintoli)	26.4	26.4	0.9	25.5	*
New Electric (400PX/Mare Island)	26.5	26.5	0.0	26.5	*
Facilities	\$	\$	\$	\$	\$
Central Bay	6.9	6.9	0.0	6.9	*
Downtown San Francisco	36.1	28.3	1.1	35.0	*
Treasure Island	6.8	6.8	0.0	6.8	*
Main Street	5.7	5.7	0.0	5.7	*
Seaplane Lagoon	11.2	11.2	0.0	11.2	*
Harbor Bay	23.2	12.7	0.0	23.2	*
Richmond	4.7	4.7	0.0	4.7	*
Mission Bay	13.5	0.7	0.1	13.4	*
Berkeley Pier	3.0	3.0	0.0	3.0	*
Oakland	16.9	16.9	0.0	16.9	*
Redwood City	*TBD	*	*	*	*

\$ Millions (Preliminary through September 2024)

RISK MANAGEMENT

Probability	High	Medium Risk	High Risk	High Risk
	Medium	Low Risk	Medium Risk	High Risk
	Low	Low Risk	Low Risk	Medium Risk
		Low	Medium	High
	Impact			

Risk ID	Risk Description	Mitigation	Level
R1	Funding Uncertainty	Continue to seek all funding sources	Medium
R2	Cost Escalation	Maximize competition	High
R3	Schedule Delays	Consider schedule incentives	High
R4	Technical Challenges	Seek service proven experience	Medium
R5	Sufficient Utility Capacity	Utility coordination	High
R6	Impact on Current Operations	Develop contingency plans	Medium
R7	Environmental Challenges	Work closely with resource agencies	Low
R8	Code Compliance	Clarify applicable codes	Low
R9	Construction Impacts	Manage construction activity	Medium
R10	Unforeseen Conditions	Conduct thorough investigations	High

LOOK AHEAD SUMMARY

- Award 150 and 400 PAX Vessel Contracts
- Issue Universal Charging Float Contract RFP
- Advance Design of Treasure Island Terminal Electrification Project
- Advance Preliminary Engineering of Downtown SF and Mission Bay Terminal Electrification Projects
- Advance Preliminary Engineering of Seaplane Terminal Electrification Project
- Perform Planning, Preliminary Engineering, and Environmental Work for Oakland and Harbor Bay Terminal Modernization Projects
- Continue Design/Environmental Coordination for Berkeley Terminal Electrification Project.
- Conduct Permitting and Design for Vallejo Reconfiguration Project
- Continue Planning for Redwood City Terminal



THANK YOU!

QUESTIONS?



San Francisco Bay Ferry



Item 8: Non-Rider Research and Marketing Update

Non-Rider Research and Marketing Update

November 14, 2024



San Francisco Bay Ferry

NON-RIDER RESEARCH & MARKETING UPDATE

Non-Rider Surveys

Latino & Black Listening Sessions

“Now Departing From the Ordinary” Campaign Report

“Ferry There” Campaign Update

Next Steps

NON-RIDER RESEARCH & MARKETING UPDATE

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Next Steps

NON-RIDER SURVEYS

- Two survey tools: qualitative and quantitative
- Both focused on East Bay residents who travel to S.F. or South S.F. at least once per week
- **Geographic focus:** Solano and Napa counties, western Contra Costa, northern Alameda
- Quantitative: 466 validated respondents through phone survey
- Qualitative: 35 deeper phone conversations

NON-RIDER SURVEYS: KEY TAKEAWAYS

- Information gap continues to exist around fares and service profile (including frequency of service)
- Terminal connections, especially on S.F. side, are a major barrier
- Non-riders have a generally positive view of the ferry system
- Non-riders have a generally negative view of driving from the East Bay to S.F./South S.F.
- Convenience (frequency and hours of operations) are cited as major factors for adopting ferry commutes

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LATINO & BLACK LISTENING SESSIONS

- Coordinated by D&A Communications as a part of their campaign development
- Past onboard surveys have shown Latino and Black ridership to be lower than expected given demographics of the communities we serve
- Two in-depth sessions held via Zoom with skilled moderators guiding the conversations
- Participants selected based on their home zip code and travel behavior, with attention paid to income, age and gender identity diversity within group

LISTENING SESSIONS: KEY TAKEAWAYS

- Information gap on fares, fare discounts and service profile (including frequency) is especially acute
- A belief that the ferry is more suited for leisure than commuting
- Cultural representation an issue for Latino listening session participants
- Vessel safety (not interpersonal safety) an issue for Black listening session participants
- Awareness of lowered fares and frequency helped make the ferry more viable among participants

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NOW DEPARTING FROM THE ORDINARY

BRAND AWARENESS CAMPAIGN

PREPARED BY
MACKENZIE

CAMPAIGN OVERVIEW

AMPLIFYING AWARENESS

We worked closely with San Francisco Bay Ferry's marketing and communications team to develop and launch an omnichannel, multi-lingual paid media campaign focused on reaching new audiences, amplifying awareness of the Ferry's unparalleled services, and growing ridership.

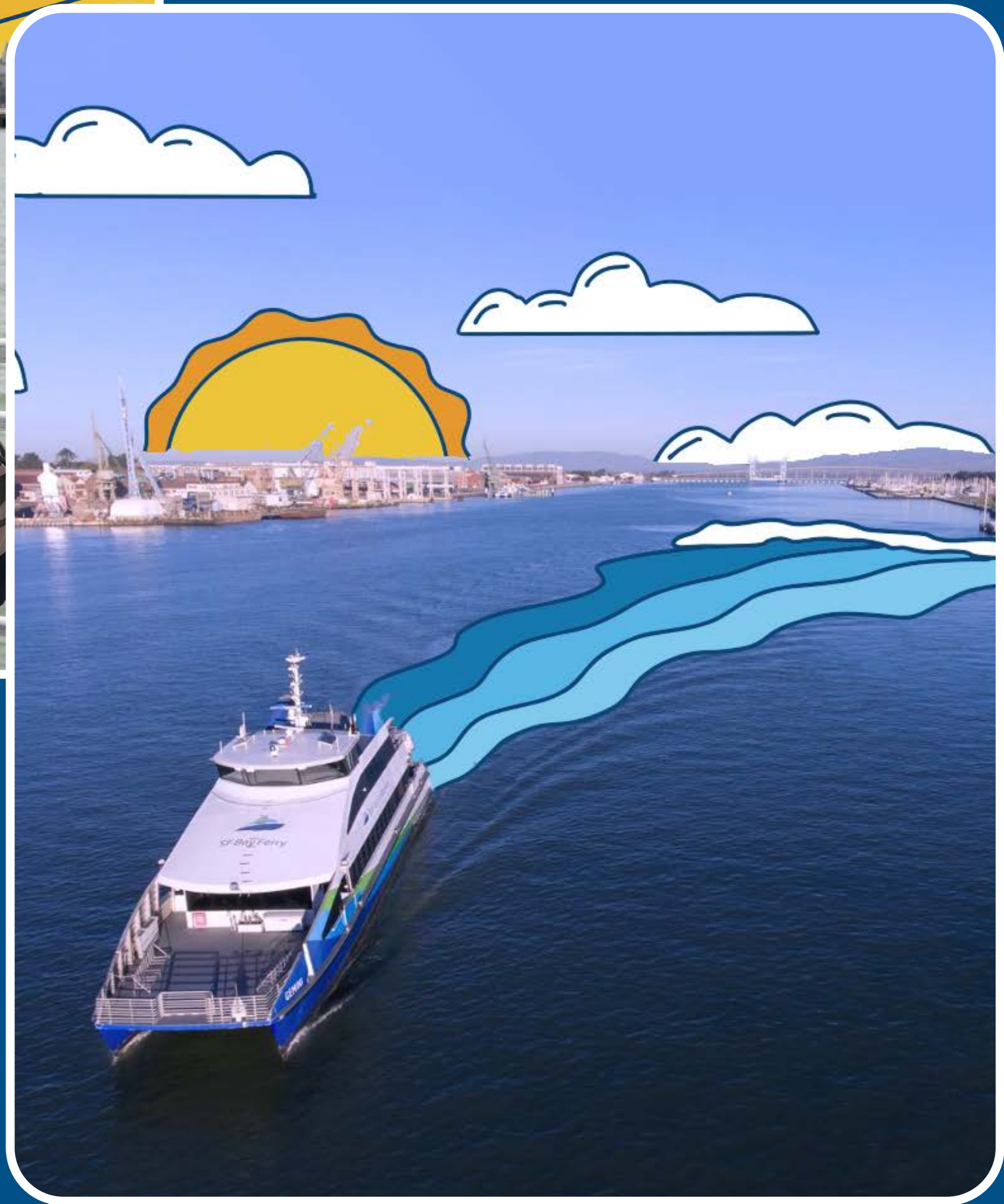
The eight-month integrated effort leveraged a mix of paid media across a variety of platforms and channels – achieving high visibility and engagement.

KEY OBJECTIVES

CAMPAIGN

FOCUS

- Develop a creative theme that reinforces SF Bay Ferry's brand and unique experience
- Increase awareness through a multi-channel mix of paid media activities
- Identify and engage diverse audiences and low-ridership communities
- Enliven the SF Bay Ferry brand through video, radio and animated ads
- Amplify reach through collaborations with influencers and hyper-local publications
- Grow ridership and promote new service offerings



CREATIVE APPROACH
CAMPAIGN
THEME

CREATIVE APPROACH CAMPAIGN THEME

Our goal was to position the SF Bay Ferry experience—not just as a mode of transportation, but as an extraordinary journey on the Bay. The creative direction aimed to capture the feeling of escape, freedom, and adventure that only a SF Bay Ferry ride offers, appealing to both daily commuters and occasional explorers.

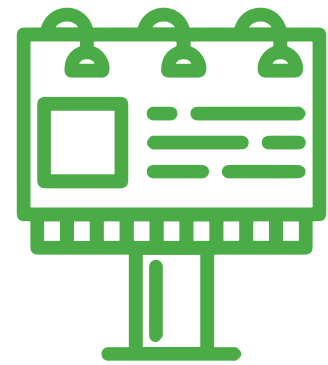
With a fun, approachable tone, and whimsical visual identity, the campaign introduces a bold new theme: **Now Departing from the Ordinary** – inviting people to take a refreshing break from “the everyday” by riding the ferry.



OMNICHANNEL STRATEGY

PAID MEDIA MIX AND TACTICS

OMNICHANNEL STRATEGY
**PAID MEDIA
MIX AND TACTICS**



OUT-OF-HOME



**DIGITAL AND
PROGRAMMATIC**



PRINT



**SPONSORED POSTS
AND PROMOTIONS**



RADIO

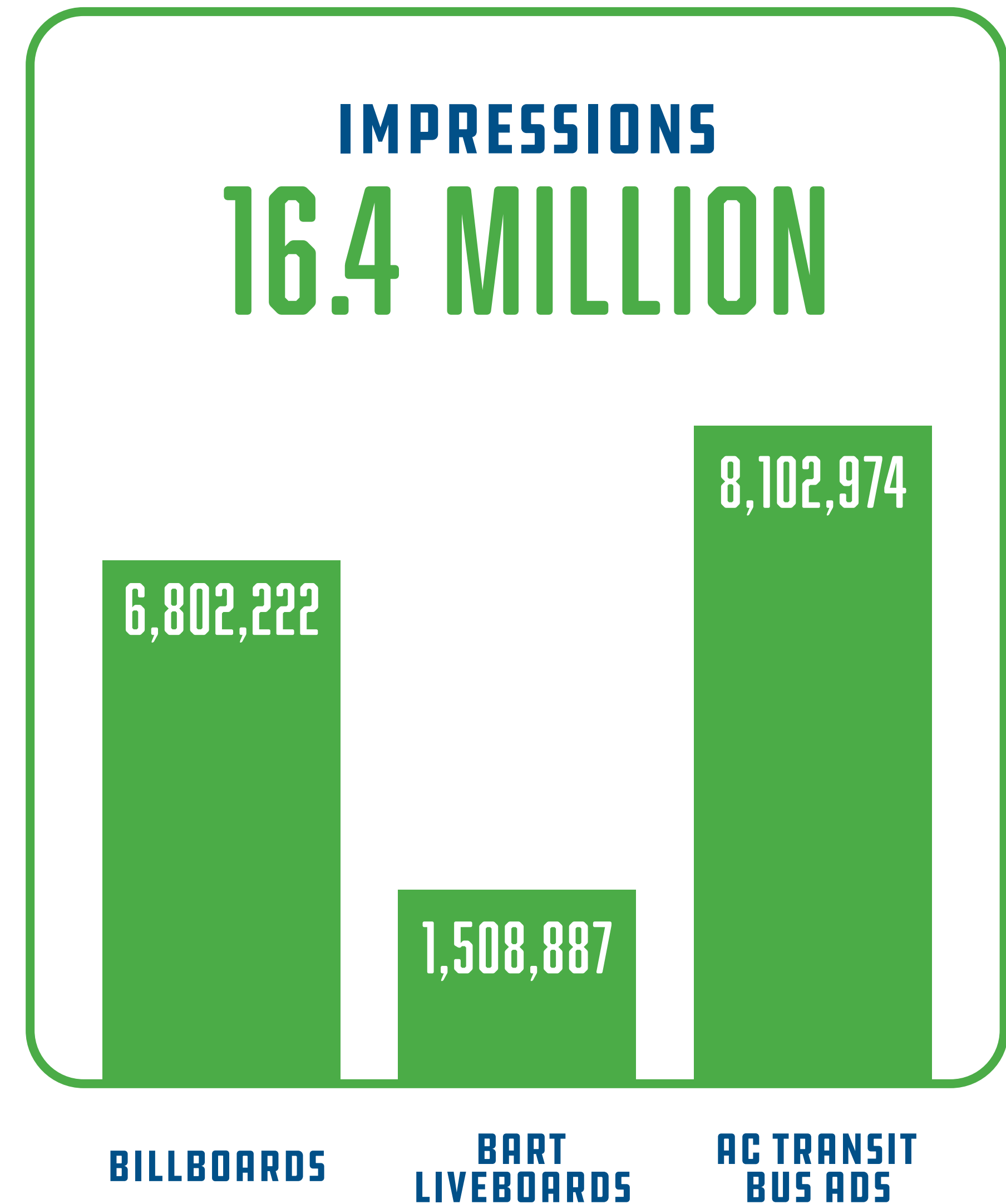


PLATFORMS AND REACH

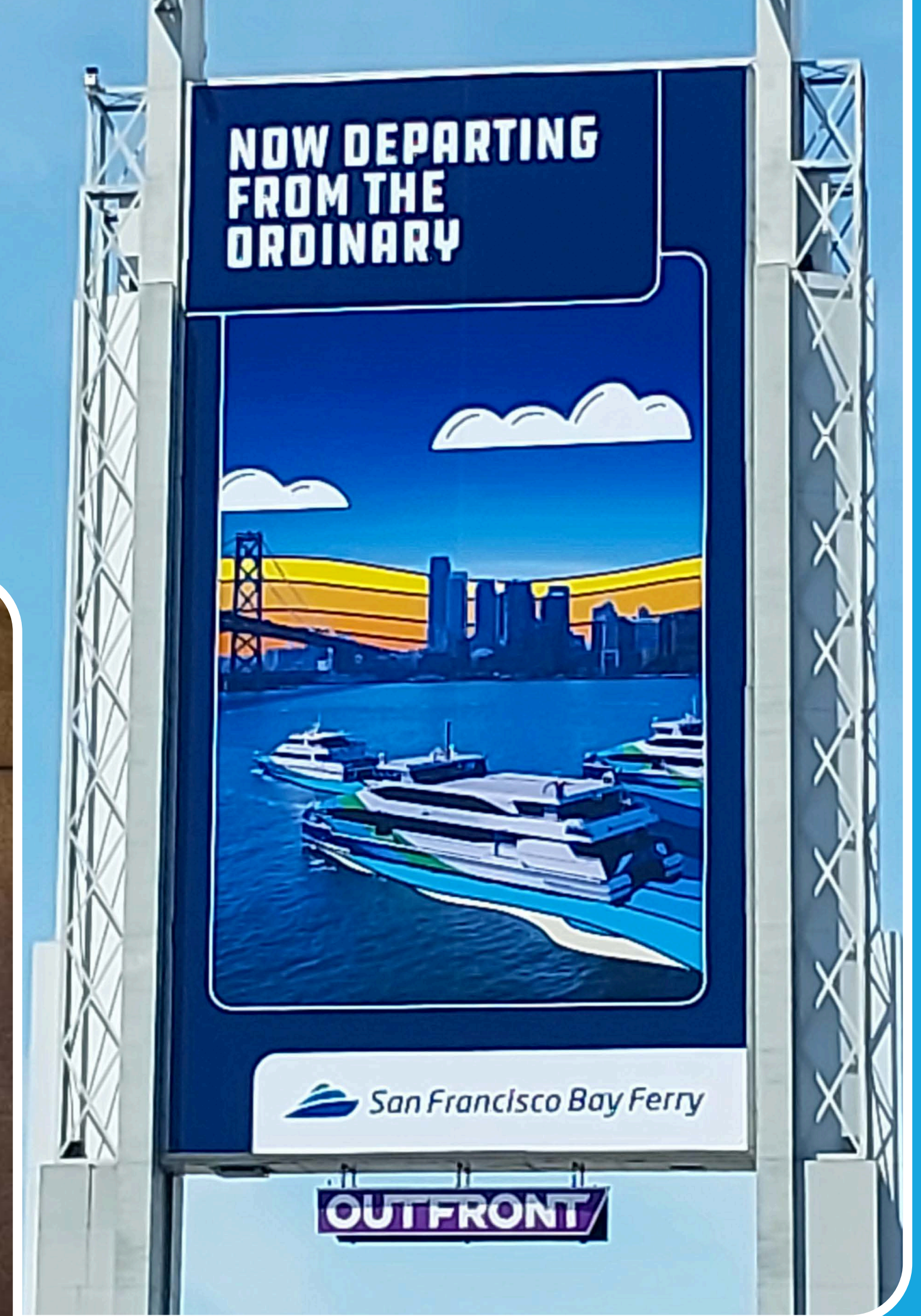
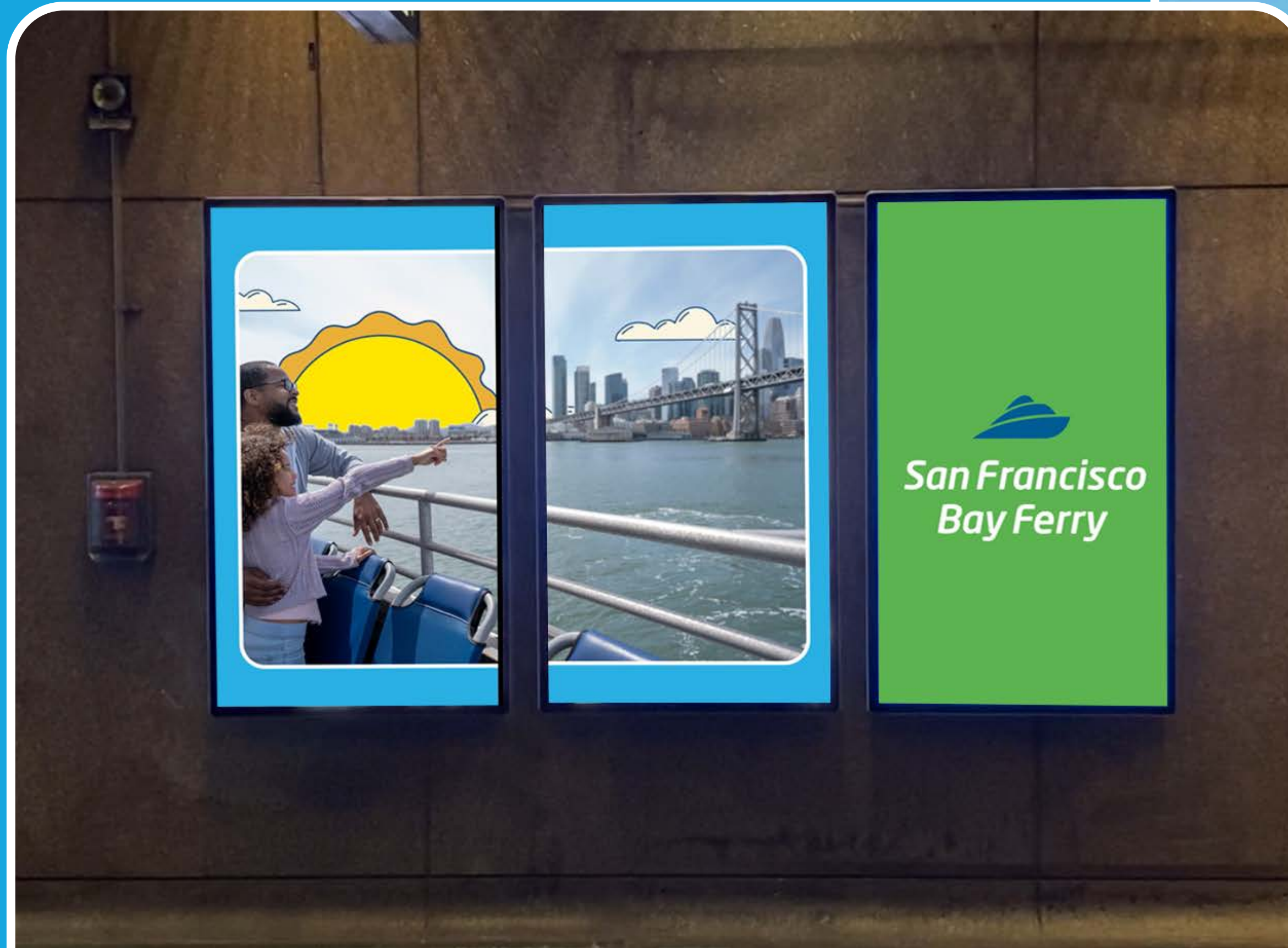
OUT-OF-HOME

PLATFORMS AND REACH **OUT-OF-HOME**

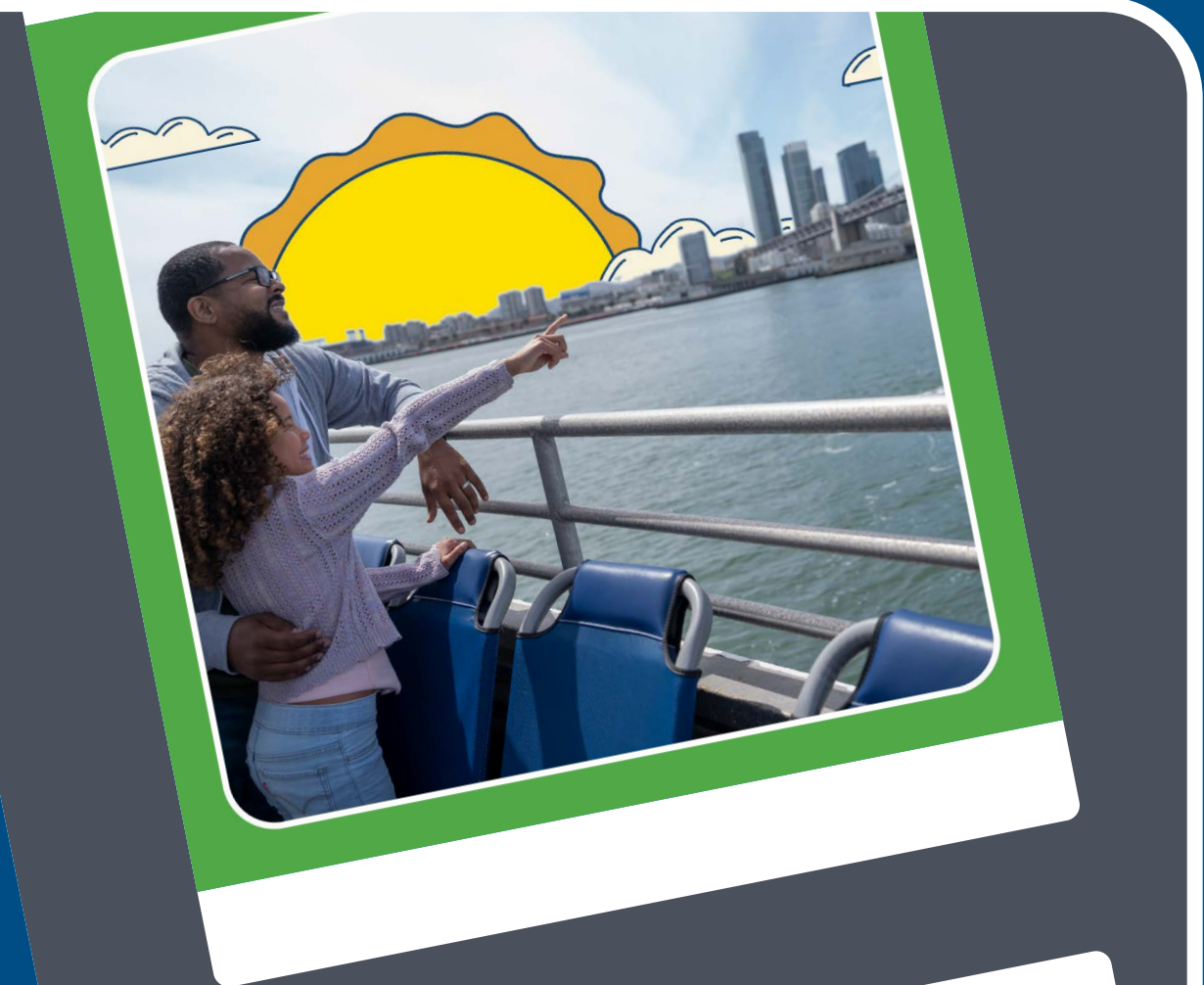
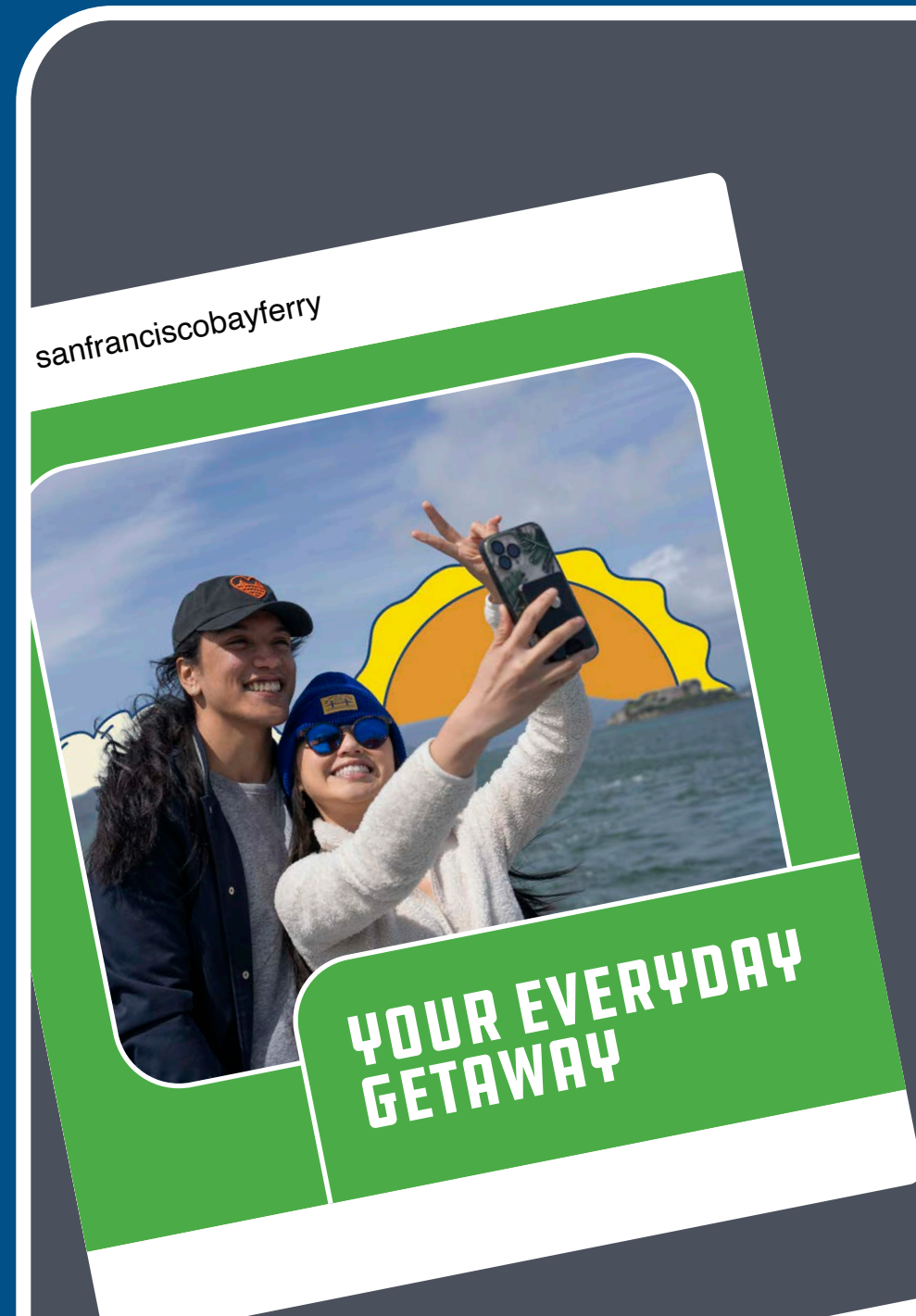
The campaign targeted rider communities, commuters and drivers through the placement of 14 billboards in major traffic corridors, multiple Liveboards in the Embarcadero BART station, and AC Transit bus ads that ran in Contra Costa and Alameda Counties.



PLATFORMS AND REACH
OUT-OF-HOME

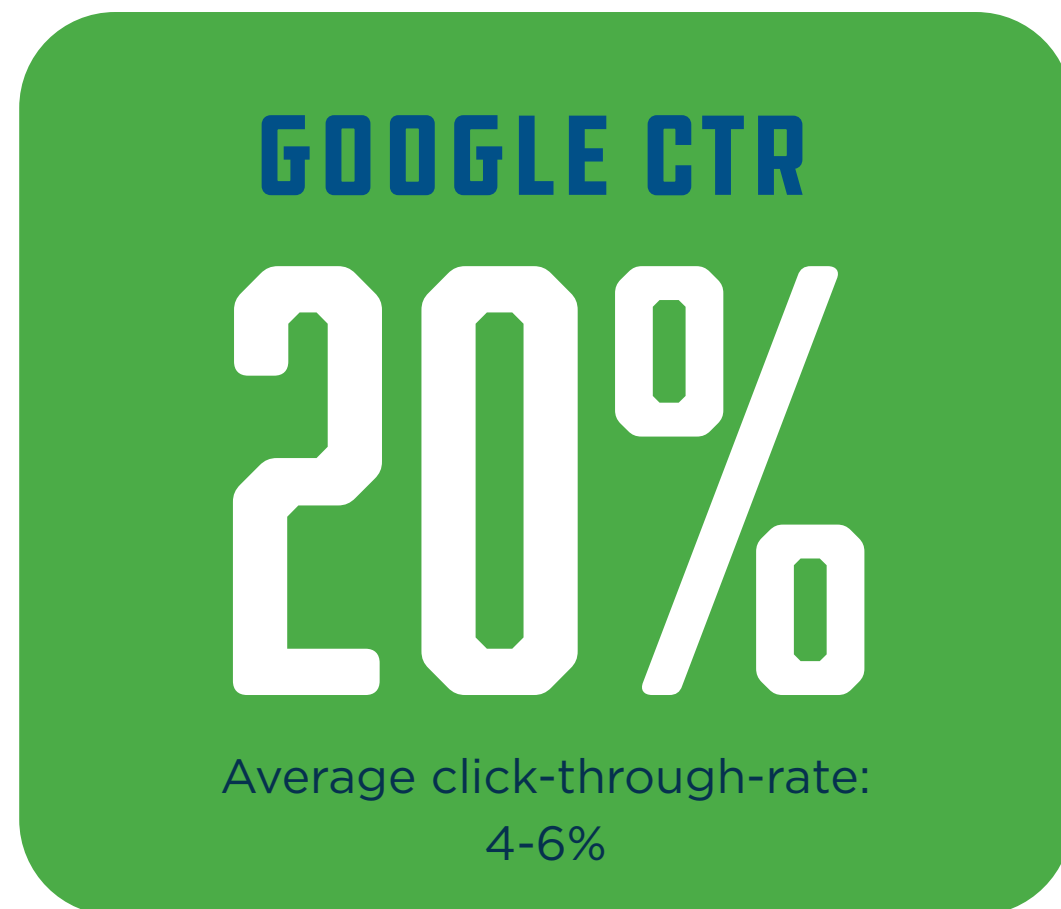
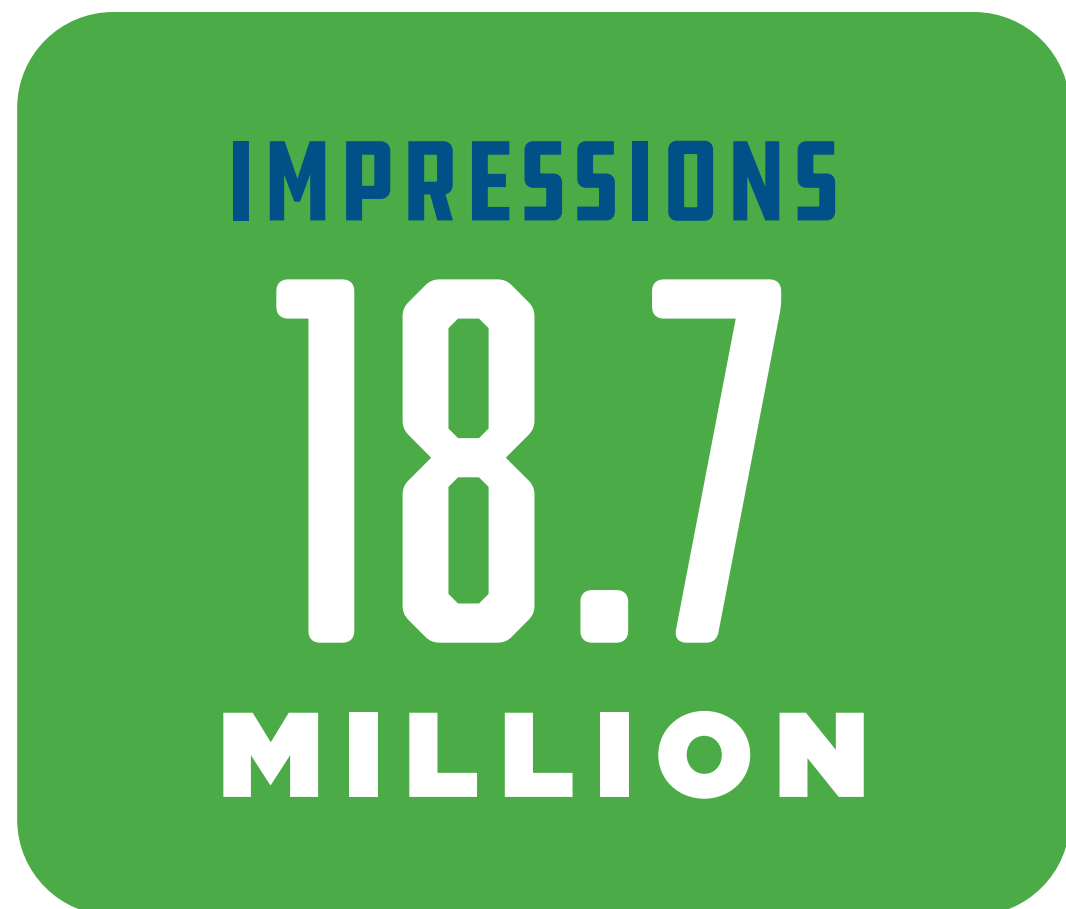


PLATFORMS AND REACH
**DIGITAL AND
PROGRAMMATIC**

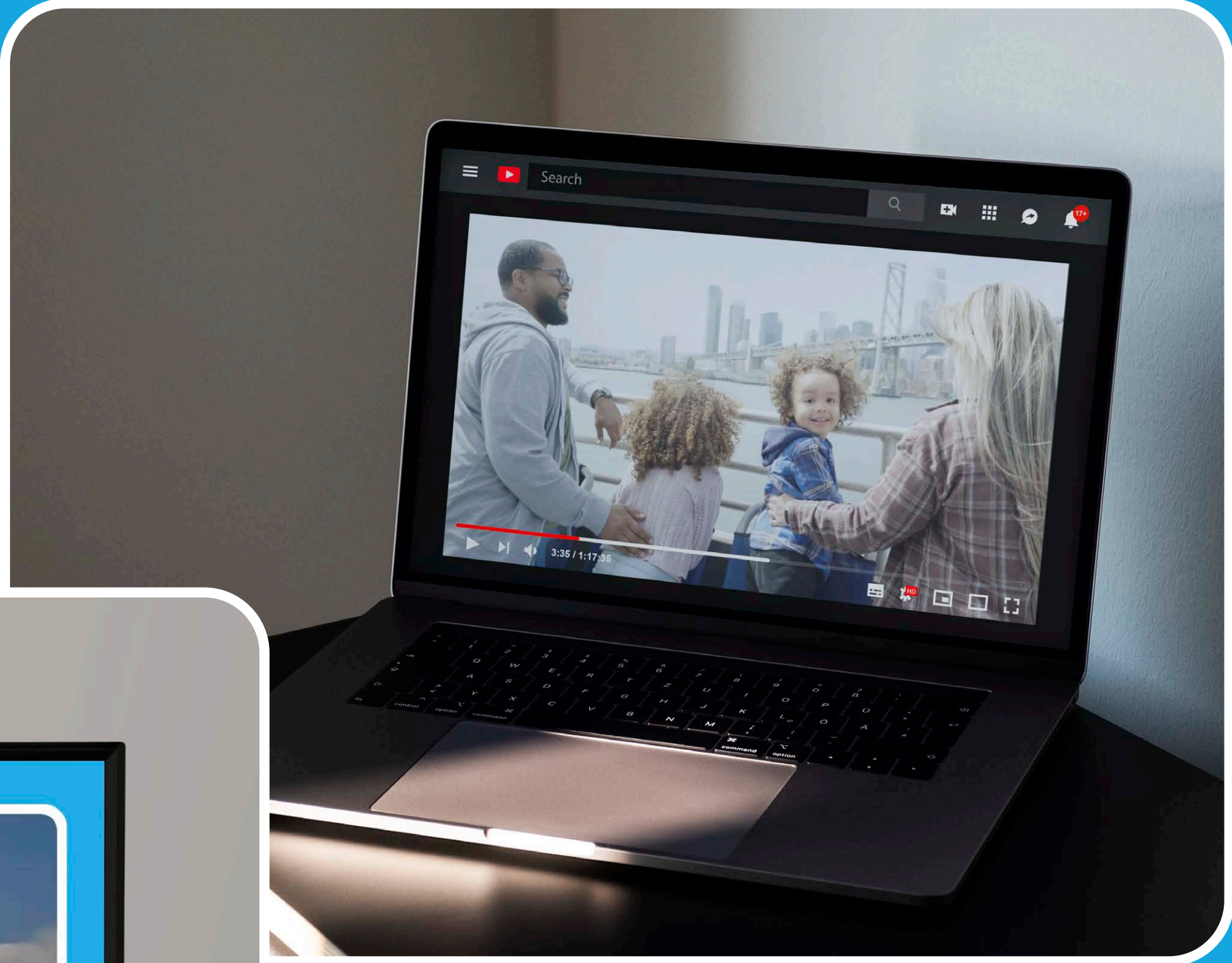


PLATFORMS AND REACH DIGITAL AND PROGRAMMATIC

The digital strategy utilized a diverse mix of static, video, audio, and search ads on the following platforms.



PLATFORMS AND REACH
**DIGITAL AND
PROGRAMMATIC**



STATIONS AND REACH
RADIO



STATIONS AND REACH RADIO

The campaign targeted drivers and potential riders through commuter radio spots on the following English — and Spanish — language programs.

IMPRESSIONS

3.5 MILLION



PUBLICATIONS AND REACH SPONSORED AND EDITORIAL CONTENT



PUBLICATIONS AND REACH SPONSORED AND EDITORIAL CONTENT

SF Bay Ferry worked with local publications and outlets to produce sponsored content that was featured in targeted email blasts, social media posts, and online editorials.

Logos of partner publications and outlets:

- FUN@HEAPSF
- broke-ass stuart
- {510} families
- Do The Bay
- East Bay
- UNIVISION

IMPRESSIONS
986,531

CLICKS
15,311

SOCIAL
ENGAGEMENTS
9,037

MAGAZINE
SUBSCRIBERS
150,000

PROMOTIONAL
GIVEAWAYS
300
FREE TICKETS
CLAIMED

EMAIL NEWSLETTER
SUBSCRIBERS
1.3
MILLION

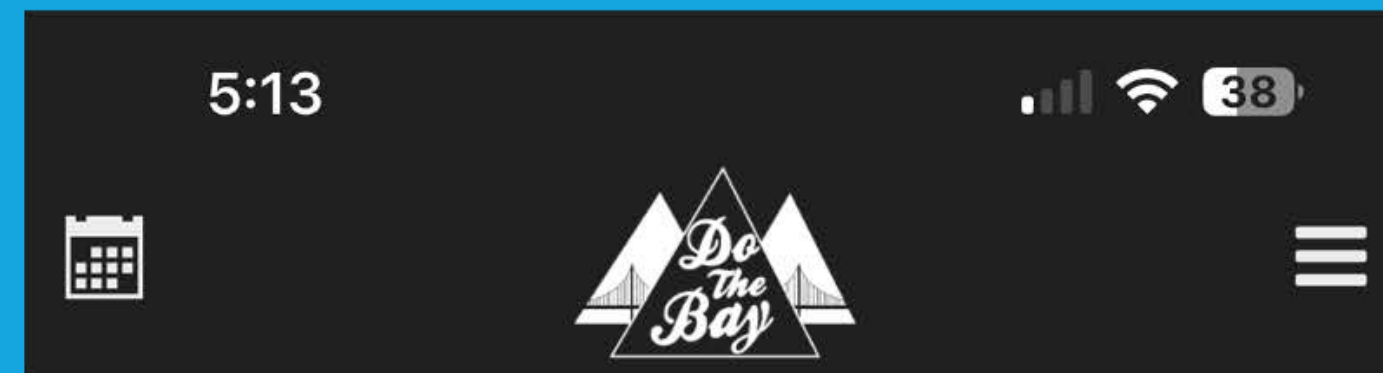
PUBLICATIONS AND REACH

SPONSORED AND EDITORIAL CONTENT



THE FUN THINGS TO DO ON ALAMEDA ISLAND

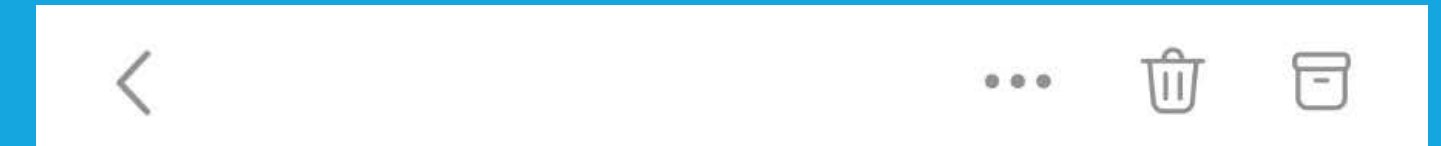
Would you like to know how to get from San Francisco to the East Bay in 20 minutes? And never get stuck in traffic, pay a bridge toll, or waste your time circling for parking...



SAN FRANCISCO BAY FERRY: NOW DEPARTING FROM THE ORDINARY

PAST(09/3/2024) 10:00AM
📍 SAN FRANCISCO BAY FERRY

Ride the waves. Feel the breeze. Say hello to a sea lion! SF Bay Ferry is the way to get where you're going. Even if it's



San Francisco Bay Ferry

AHORA ZARPAMOS HACIA LO EXTRAORDINARIO



San Francisco Bay Ferry

El Ferry de la Bahía de San Francisco convierte el tránsito diario



CAMPAIGN TOTALS

PERFORMANCE SNAPSHOT

CAMPAIGN TOTALS
**PERFORMANCE
SNAPSHOT**

IMPRESSIONS

39.6
MILLION

CLICKS TO SFBF
LANDING PAGE

30,893

EMAIL NEWSLETTER
SUBSCRIBERS

1.3
MILLION

NACKENZIE

NON-RIDER RESEARCH & MARKETING UPDATE

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Ferry There!

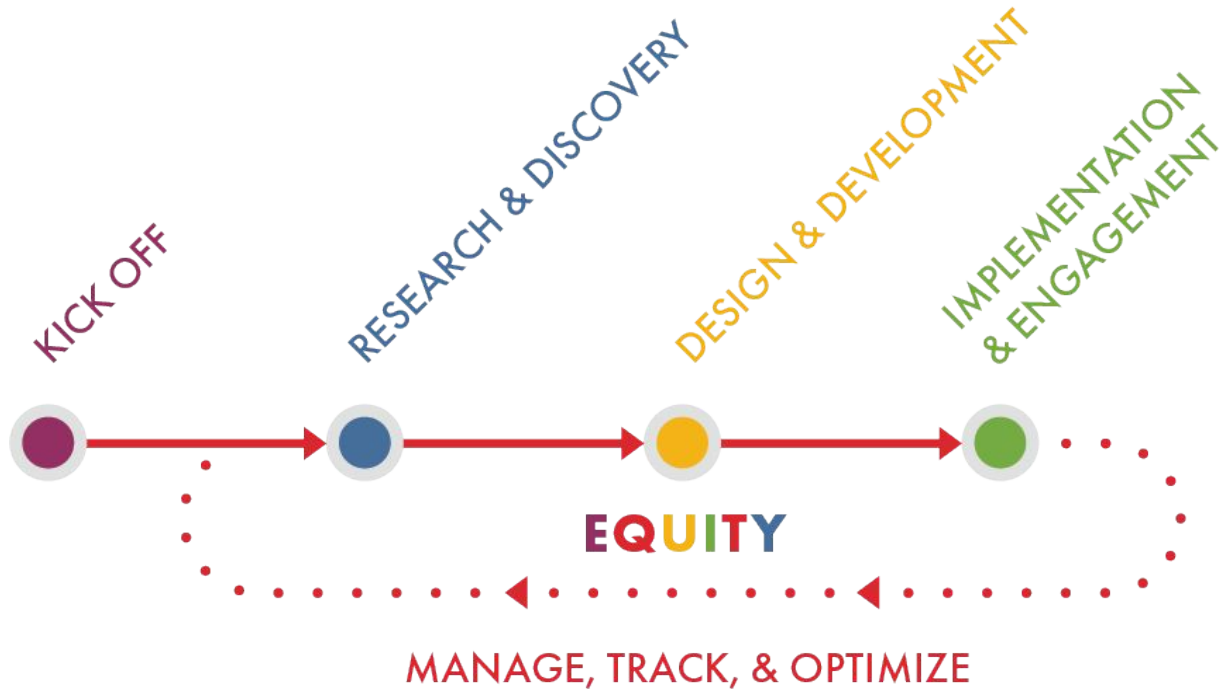
WETA Low-Propensity Rider Marketing & Outreach Campaign
November 2024

Who We Are: An Equity-First Communications Agency



- **Equity & inclusion** are at the core of all we do.
- **30 years** experience serving Bay Area agencies.
- **Full Service Integrated Team.**
- **Collaboration:** We partner with you to tell your story.
- **Impact:** We are invested in your outcomes.

Our Strategic Approach



The Objective

Reach, educate and engage a diverse rider demographic, with a focus on Black and Latino resident in the East Bay.

Tactics

1 Social Media Templates

2 Digital Advertising

3 Creator Collaboration

4 Direct Mailing Campaign

5 Street Marketing: Posters

6 Postcard stacks

1 Social Media Templates

Commute Smarter. Ferry There.

From **Starting Location** Write any relevant details about the specific route, line, or service.

To **Ending Destination**

Fare **\$0.00** Time **# of min.** Insert information that could be useful to travelers.

DOWNTOWN SF **MAIN ST ALAMEDA** **OKLAND**

Clockwise service on weekdays only. Counter-clockwise service daily.

Find your route today & discover SF Bay Ferry!

FERRY FACT

X%

Insert interesting statistic or numerical data about Ferry Ridership or history.

IN TODAY'S ECONOMY, \$5 DOESN'T STRETCH FAR.

- Item to compare cost **\$0.00**
- Item to compare cost **\$0.00**
- Item to compare cost **\$0.00**

Ferry Ticket **\$4.70**

2 Digital Advertising


 Commute Smarter. Ferry There.

FAST,
RELIABLE,
AFFORDABLE!
SF BAY FERRY.

 San Francisco Bay Ferry

San Francisco Bay Ferry

- San Francisco Bay Ferry is **affordable**
- San Francisco Bay Ferry is **reliable and fast**
- San Francisco Bay Ferry is a **relaxing commute**
- San Francisco Bay Ferry is a **safe commute**
- San Francisco Bay Ferry is **easy to ride**



 CHASE CENTER FERRY

WARM UP FOR THIS WARRIORS SEASON

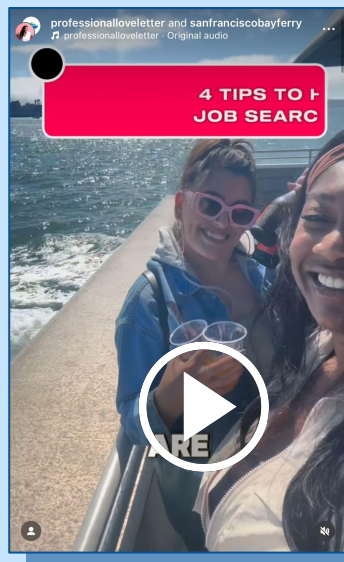
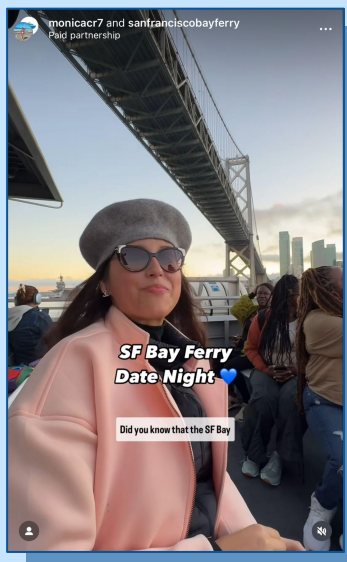
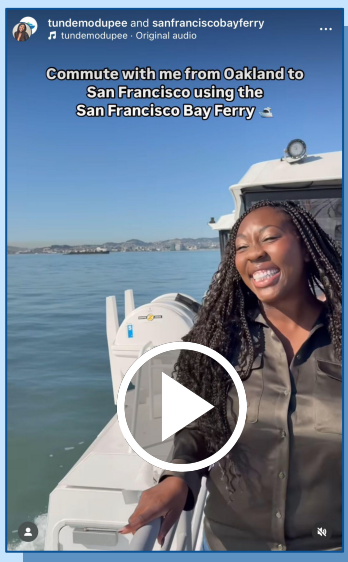
The terminal is at **Pier 48**, a half-mile north of Chase Center off of Terry A. Francois Blvd. The walk takes most passengers about **12-15 minutes**.

- ✓ Fast
- ✓ Reliable
- ✓ Affordable

Ferry There >

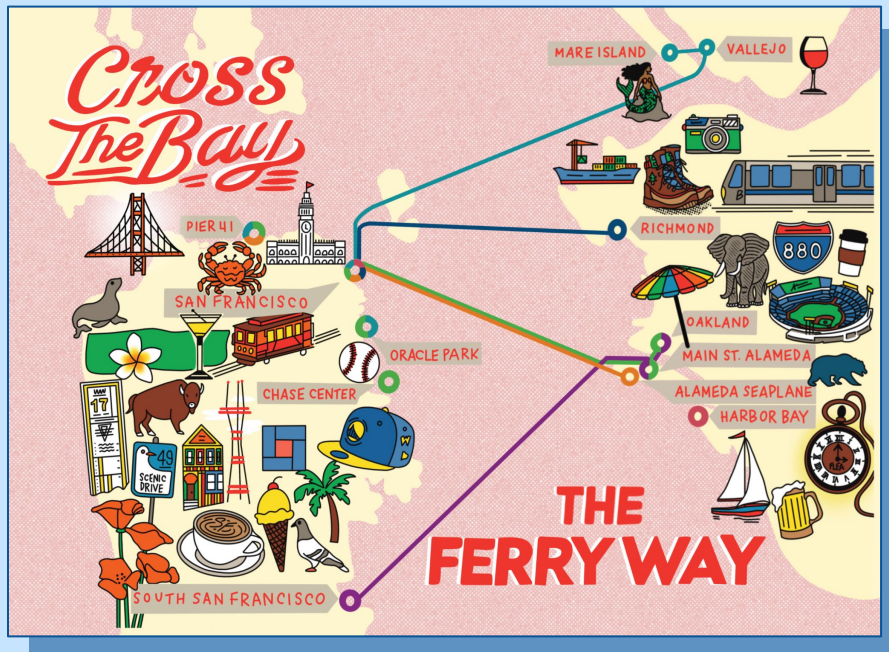


3 Creator Collaboration




4 Direct Mailing Campaign

Postcard



Postcard Back



San Francisco Bay Area Water Emergency Transportation Authority
Pier 9, Suite 111, The Embarcadero
San Francisco, CA 94111


Reliable and stress-free travel across the Bay.

- \$4.70 each way
- Kids under 5 ride free
- Half-price for seniors and youth
- 35-minute scenic commute
- 97% on-time rate.
- Pay with Clipper or the SF Bay Ferry App
- Free parking at the Richmond ferry terminal
- Service seven days a week

Viaje confiable, escénico y sin estrés a través de la Bahía.

- \$4.70 cada viaje
- Niños menores de 5 años viajan gratis
- Mitad de precio para personas mayores de 65 y jóvenes menores de 17 años
- Niños menores de 5 años viajan gratis
- Viaje panorámico de 35 minutos
- 97% de puntualidad
- Los boletos se pueden comprar en la aplicación Clipper y SF Bay Ferry
- Estacionamiento gratuito en las terminales de ferry de Richmond
- Servicio siete días a la semana

Commute Smarter. Ferry There.
Desplázate de la manera más inteligente. Viaja en el ferry.
sanfranciscobayferry.com

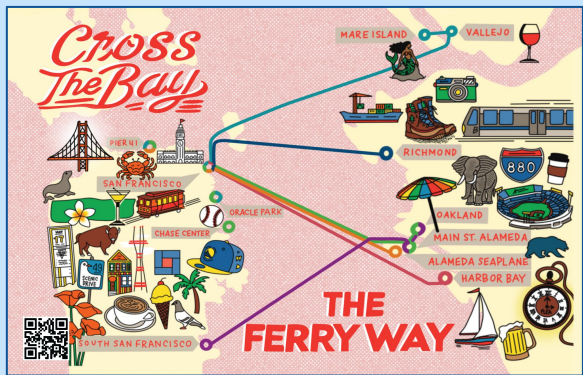




Local Artist Gabriela Alemán

5 **Street Marketing: Poster**

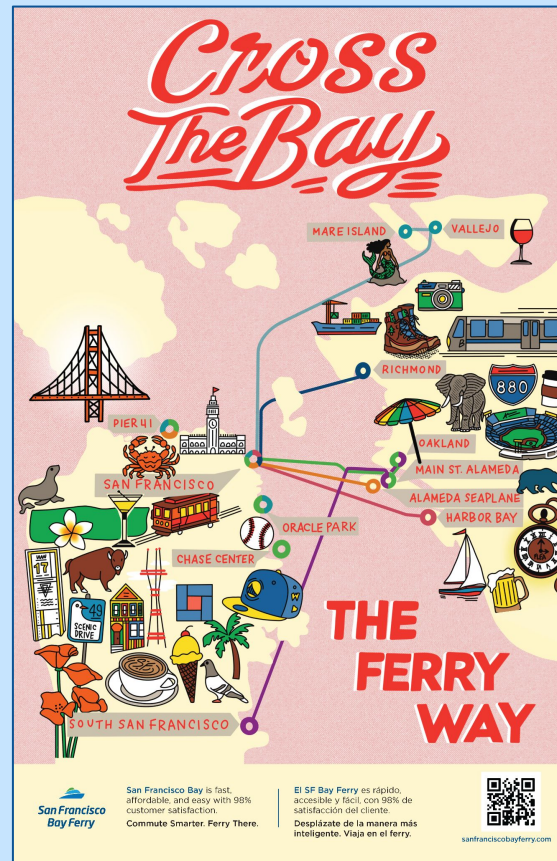
6 **Postcard Stack**



English



Spanish



Local Artist Gabriela Alemán

Highlights To Date

The campaign sparked a wide range of meaningful conversations, shifting perception and encouraging new routines such as:

- Appreciating the ferry as an affordable public transit option
- Recognizing the ferry as a fast, reliable alternative for commuting
- Valuing the ferry as a safe and secure travel choice
- Utilizing a new platform for WETA such as LinkedIn

The digital media ads resonate strongly with the Hispanic community in Alameda and Oakland, outperforming English-language ads in engagement.

Postcards and posters attract significant attention (high rate of QR scans)

Collaboration with creators has driven over 500 ticket sales from followers who engaged with their content.



Thank you!

1388 Sutter Street Suite 510, San Francisco, CA 94109 | 415.274.1821 | davisimpact.com

NON-RIDER RESEARCH & MARKETING UPDATE

Non-Rider Surveys

Latino & Black Listening Sessions

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“Ferry There” Campaign Update

Next Steps

NEXT STEPS

- Continue and potentially extend “Ferry There” campaign into Q1 2025
- Develop concepts for Q2/Q3 2025 “peak season” campaign with a focus on digital video in lieu of display and search
- Dig deeper into non-rider survey results internally
- Build plans and collateral focused on the information gap for community outreach program

SUPPORT FOR FERRY REVENUE MEASURE

- In 2024, we asked riders and non-riders whether they would “support a future ballot initiative that raises new revenue for investment in expanded and improved regional ferry service.”
- **Non-riders:** 65% support, 15% oppose (+50%)
 - 21% neutral
 - 40% strongly agree, 5% strongly oppose
- **Riders:** 77% support, 3% oppose (20% neutral)
- Large majority of respondents in both surveys reside in Solano, Napa, Alameda and Contra Costa counties



San Francisco Bay Ferry