

South San Francisco Ferry Service Study

July 23, 2025



San Francisco Bay Ferry

AGENDA

1

Purpose and Need

2

Timeline

3

Working Group Partners

4

Background

5

Data and Methods

6

SSF Route Performance and Characteristics

7

Service Adjustments – Example Concepts

8

Open Discussion & Next Steps

PURPOSE

The 2025 South San Francisco Study was initiated by the San Francisco Bay Ferry (SFBF) Board to consider service restructuring options for the SSF route that would ultimately ensure the long-term financial sustainability of the service and SFBF system in general.

The Study will be prepared in collaborative with a Technical Working Group and input from the public.

The results of the Study may include a recommendation to restructure service.

PROPOSED TIMELINE



INTRODUCTION OF THE WORKING GROUP PARTNERS

Government



Business



Community



BACKGROUND – SOUTH SAN FRANCISCO FERRY SERVICE

- In 2004, San Mateo County approved **Measure A** to fund local transportation projects, including ferry service to South San Francisco
- San Francisco Bay Ferry launched service in 2012 with support from SMCTA and the City of South San Francisco
- Current service operates on weekdays between Alameda/Oakland and SSF
- Aside from a brief COVID-19 suspension, the level of service has remained largely unchanged since 2012

East Bay to South San Francisco Mon.–Fri.		
DEPART MAIN ST. ALAMEDA	DEPART OAKLAND	ARRIVE SOUTH S.F.
6:05 AM	6:20 AM	7:00 AM
7:05 AM	7:20 AM	8:00 AM
8:00 AM	8:20 AM	9:00 AM
4:25 PM	4:10 PM	5:05 PM

South San Francisco to East Bay Mon.–Fri.		
DEPART SOUTH S.F.	ARRIVE OAKLAND	ARRIVE MAIN ST. ALAMEDA
7:10 AM	8:10 AM	7:50 AM
3:20 PM	4:00 PM	4:20 PM
4:20 PM	5:00 PM	5:20 PM
5:30 PM	6:10 PM	6:30 PM

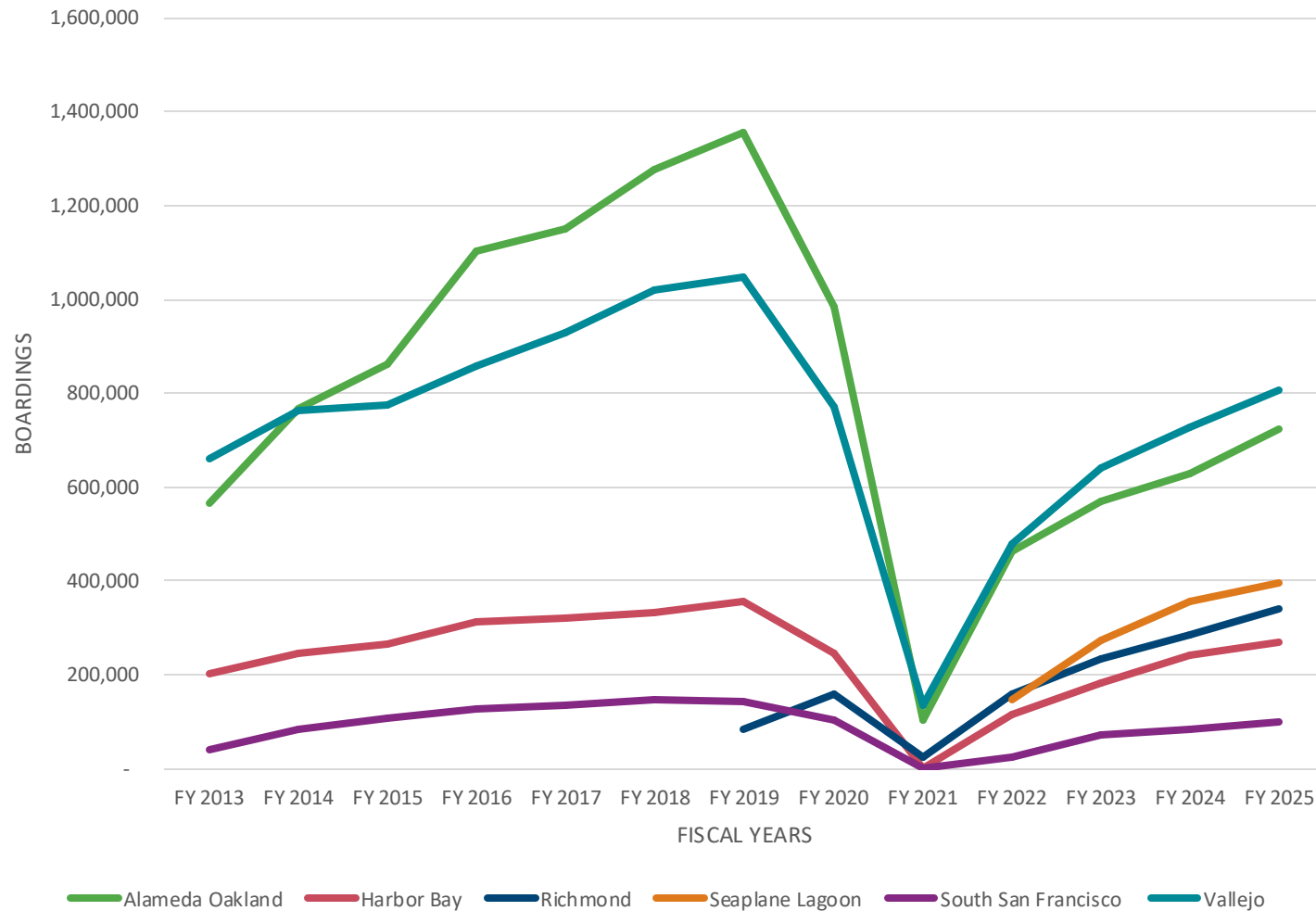
BACKGROUND – FUNDING AND PERFORMANCE REQUIREMENTS

- The SSF Route is funded by Regional Measure 2 (RM2), Regional Measure 3 (RM3), and fare revenue.
- RM2 requires a 40% farebox recovery ratio, which SSF has never met since service launch in 2011. This requirement is currently suspended due to COVID.
- RM3 became available in 2023 providing new operating subsidy to support current services.
- SFBF has proposed RM3 performance measures based on farebox recovery, customer experience, and regional coordination.
- SFBF is projected to exhaust its RM3 reserves and hit a fiscal cliff in FY 2034 or earlier if the system is expanded.

DATA AND METHODS

- Background performance data on ridership, service productivity, financial, and service demographics/characteristics.
- Data sources:
 - Ridership counts
 - Budgeted and actual operating costs
 - Fare revenue data
 - Survey data

RIDERSHIP BY ROUTE



- Since FY2013, the South San Francisco route has the lowest ridership out of all SF Bay Ferry routes, accounting for 3-5% of the system’s ridership.

Figure 1. Ferry Ridership by Route (FY 2013 – FY2025)
 Excludes Special Events Services, P41 Service & Pilot Services

BOARDINGS

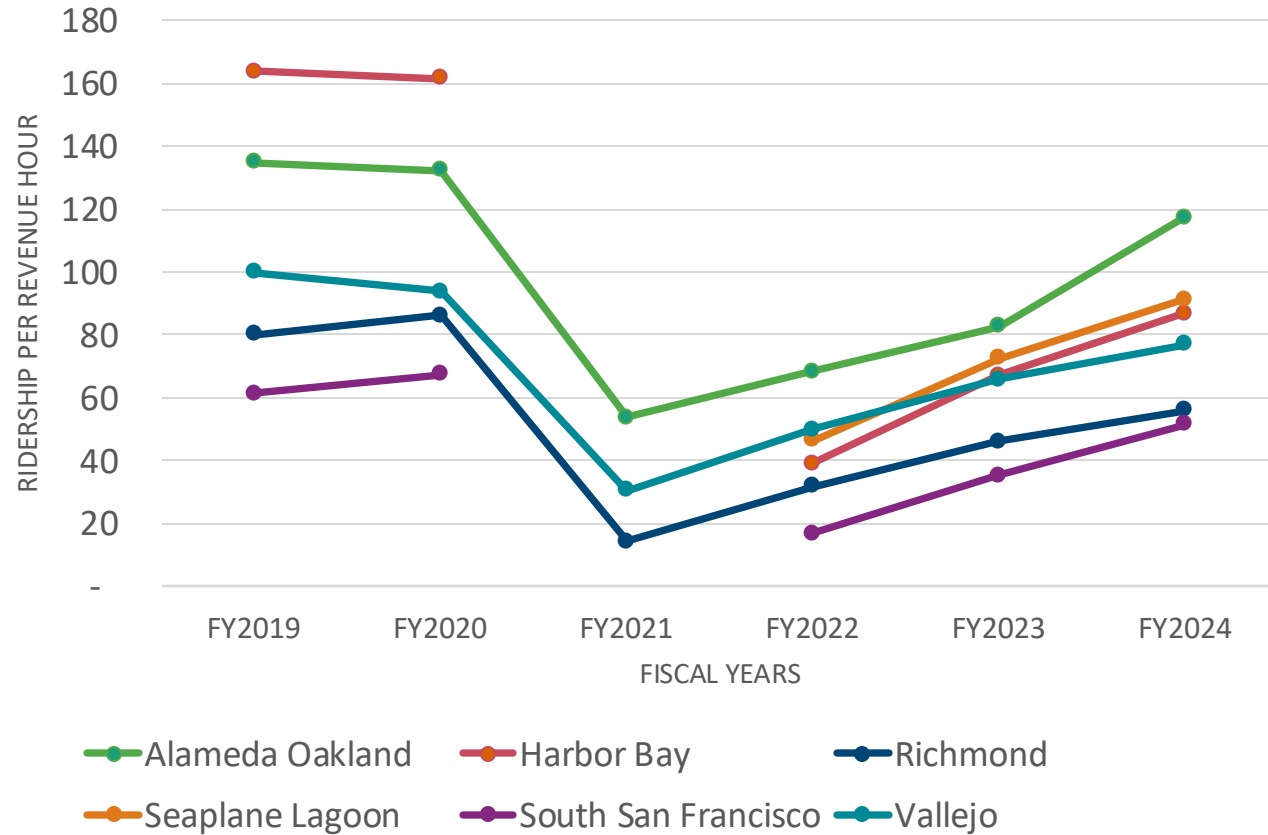
- The South San Francisco route had approximately **100,000 boardings** in FY2025

South San Francisco Route (FY2025)

Origin	Boardings
Main Street Alameda	10,952
Oakland	40,715
South San Francisco	46,521
Total	98,188



SERVICE PRODUCTIVITY (RIDERS PER REVENUE HOUR)



- South San Francisco has the lowest ridership per revenue hour among all services

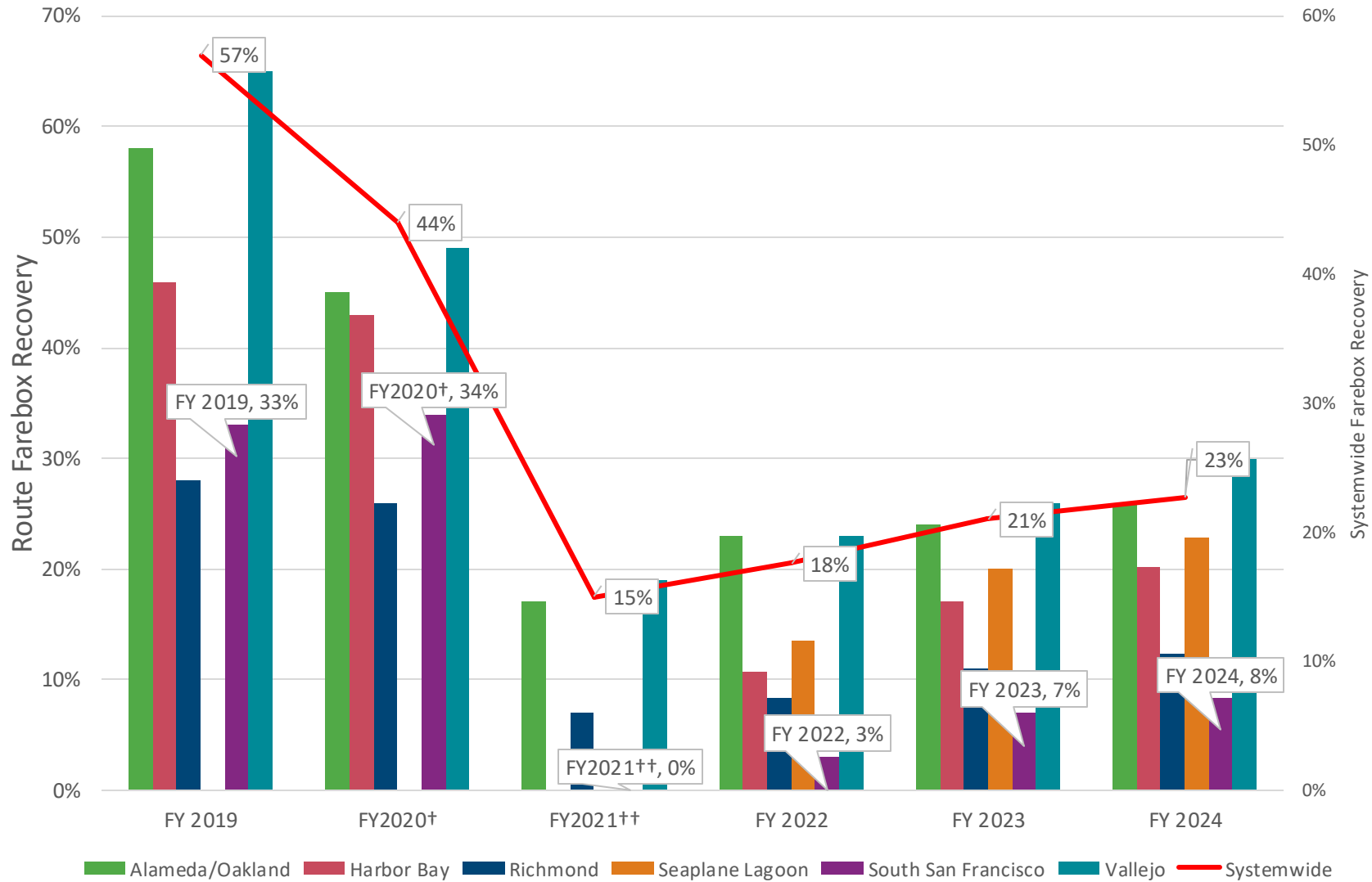
Figure 2. Ridership per Revenue Hour

FINANCIAL PERFORMANCE

Ferry Operating Budget FY2024

Ferry Service	Expenses	Fare Revenue	Other Operating Revenue
Alameda/Oakland	\$12,173,854	\$3,134,705	\$9,039,149
Harbor Bay	\$5,110,422	\$1,034,594	\$4,075,828
Richmond	\$9,225,023	\$1,136,432	\$8,088,591
Seaplane Lagoon	\$6,344,974	\$1,453,685	\$4,891,289
South San Francisco	\$4,806,572	\$397,783	\$4,408,789
Vallejo	\$19,094,367	\$5,717,416	\$13,376,951
Systemwide	\$56,755,212	\$12,874,614	\$43,880,598

FINANCIAL PERFORMANCE – FAREBOX RECOVERY



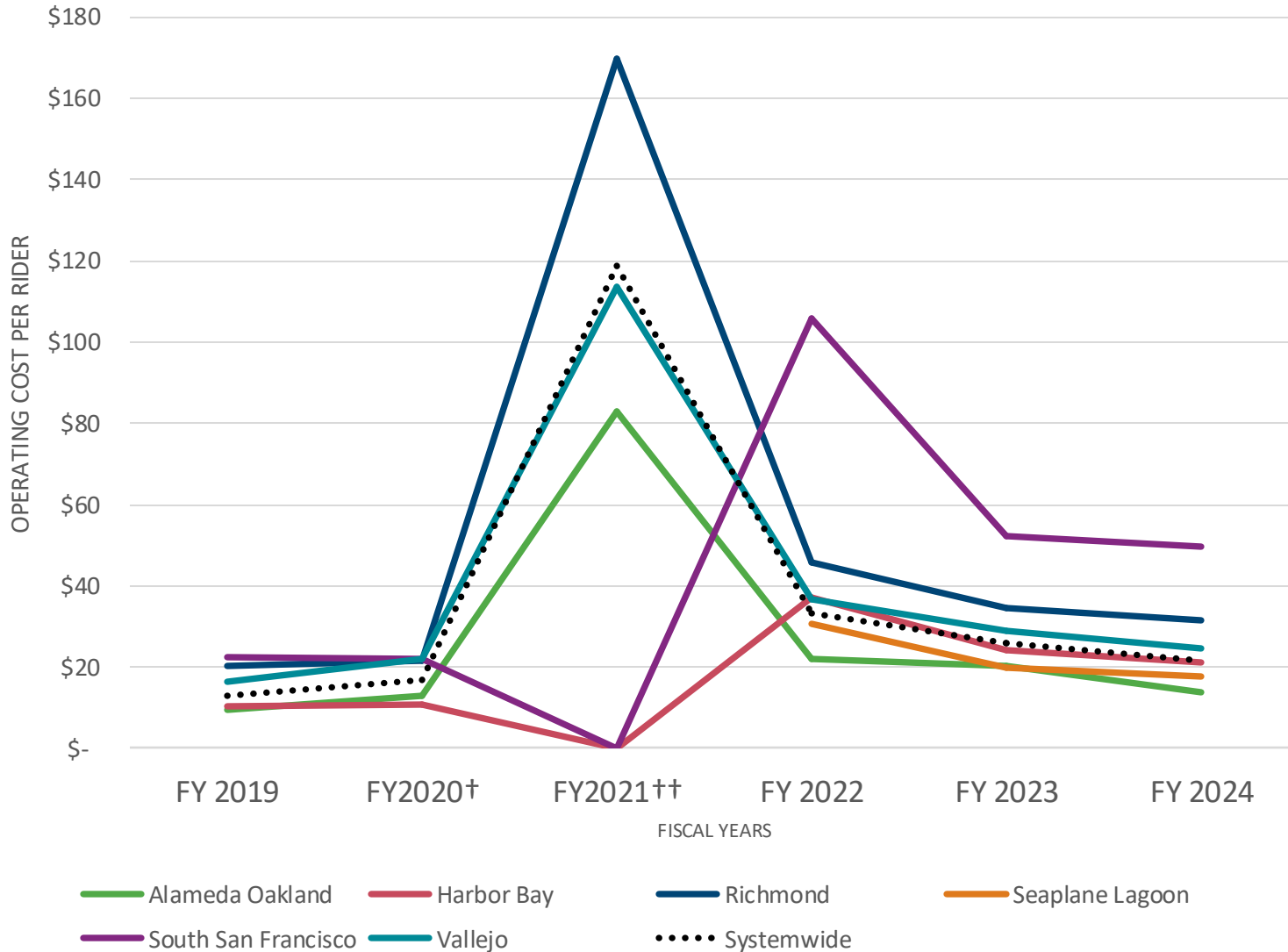
- South San Francisco farebox recovery ratio, averages under 10%

Figure 4. Farebox Recovery by Route (FY2019–2024)

† Service suspended in South San Francisco, Richmond, and Harbor Bay due to COVID-19. Richmond resumes on Monday, June 15.

†† Service suspended on Harbor Bay and South San Francisco due to COVID-19* Service suspended on the South San Francisco route until November 2021

FINANCIAL PERFORMANCE - OPERATING COST PER RIDER



- The South San Francisco service is more expensive in terms of operating cost per rider than system average

Figure 3. Operating Cost per Rider (FY2019–2024)

† Service suspended in South San Francisco, Richmond, and Harbor Bay due to COVID-19. Richmond resumes on Monday, June 15.

†† Service suspended on Harbor Bay and South San Francisco due to COVID-19* Service suspended on the South San Francisco route until November 2021

DEMOGRAPHICS (ANNUAL HOUSEHOLD INCOME)

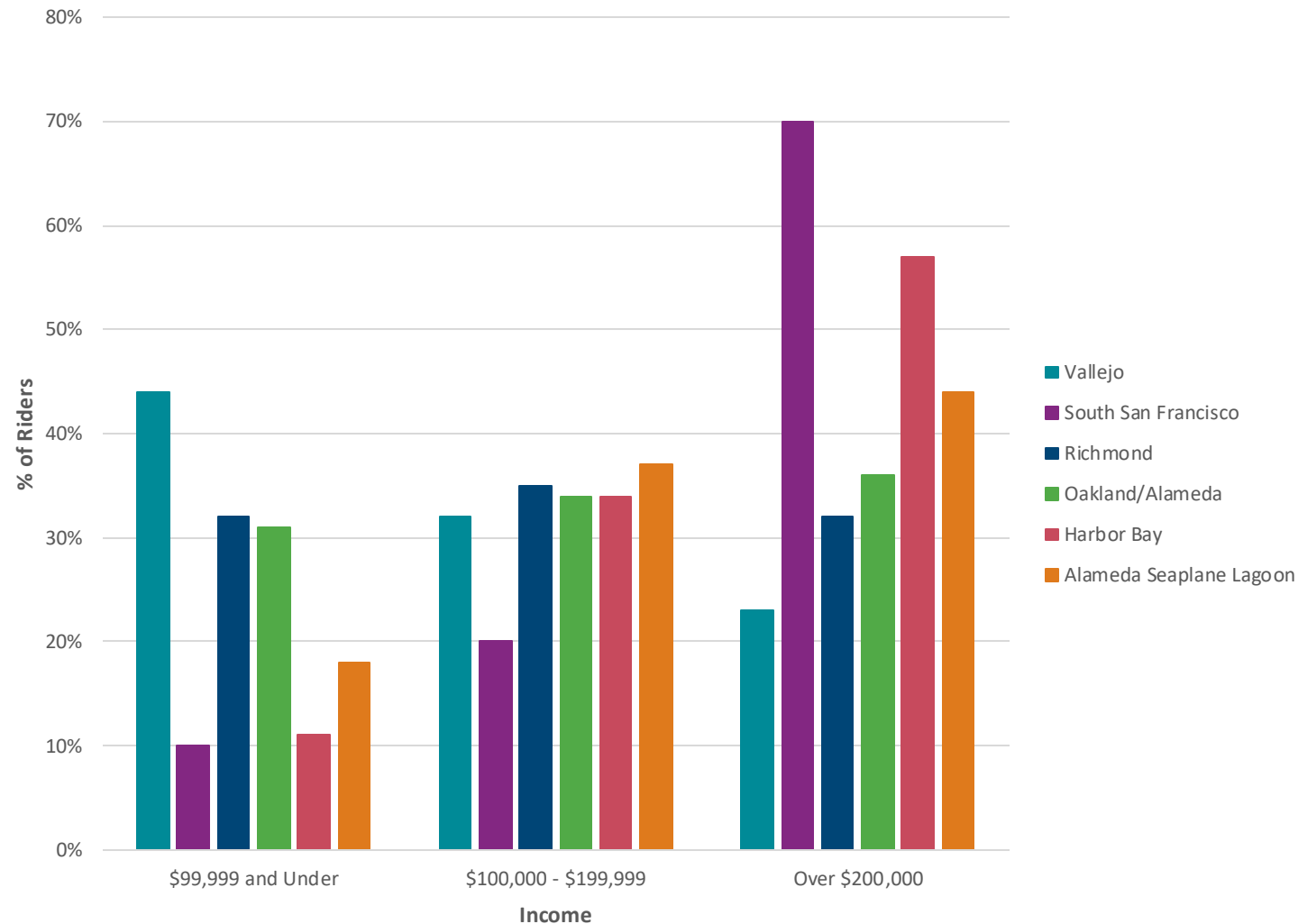


Figure 5. Proportion of Annual Household Income by Route (2024)

- In a 2024 survey, 1,744 SFBF riders responded to questions regarding demographics and ridership characteristics.
- 70% of riders on the SSF route report a household income of \$200,000 and above.

RIDERSHIP CHARACTERISTICS – TRIP PURPOSE

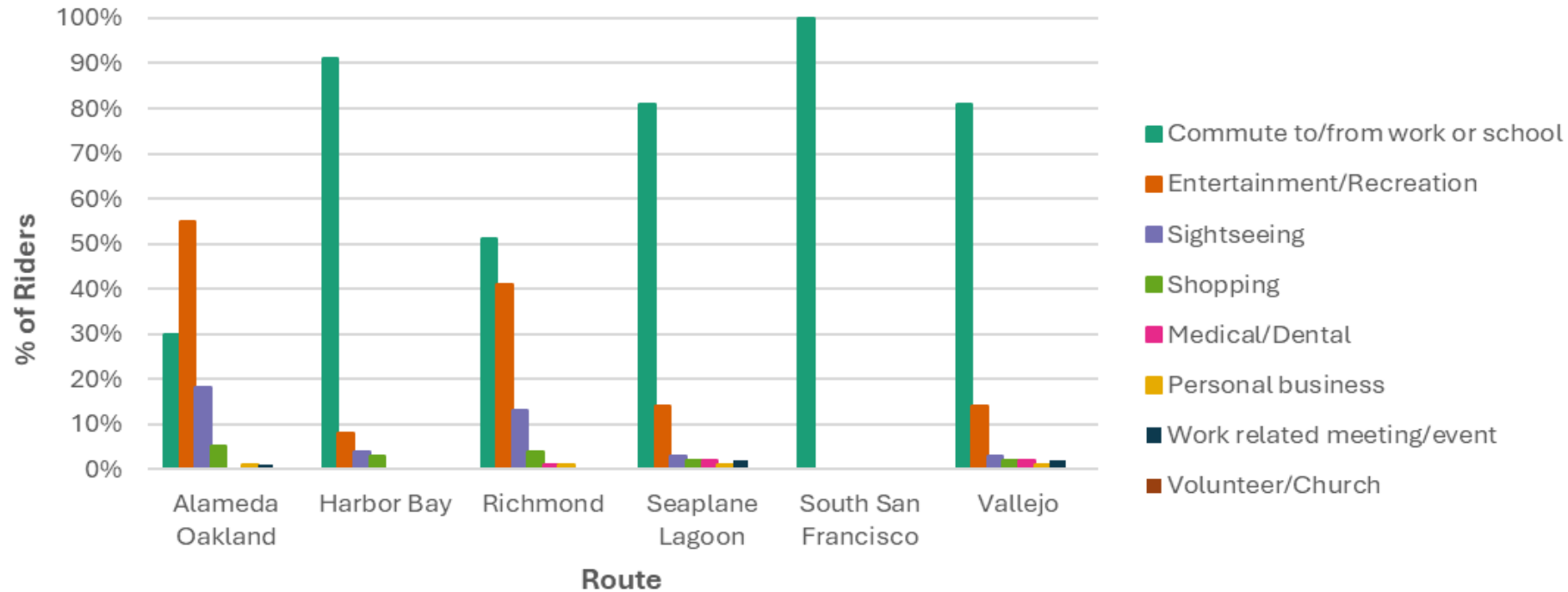


Figure 6. Proportion of Trip Purpose by Route

The SSF Route was the only route whose riders used the service exclusively for work or school.

RIDERSHIP CHARACTERISTICS – TRIP FREQUENCY

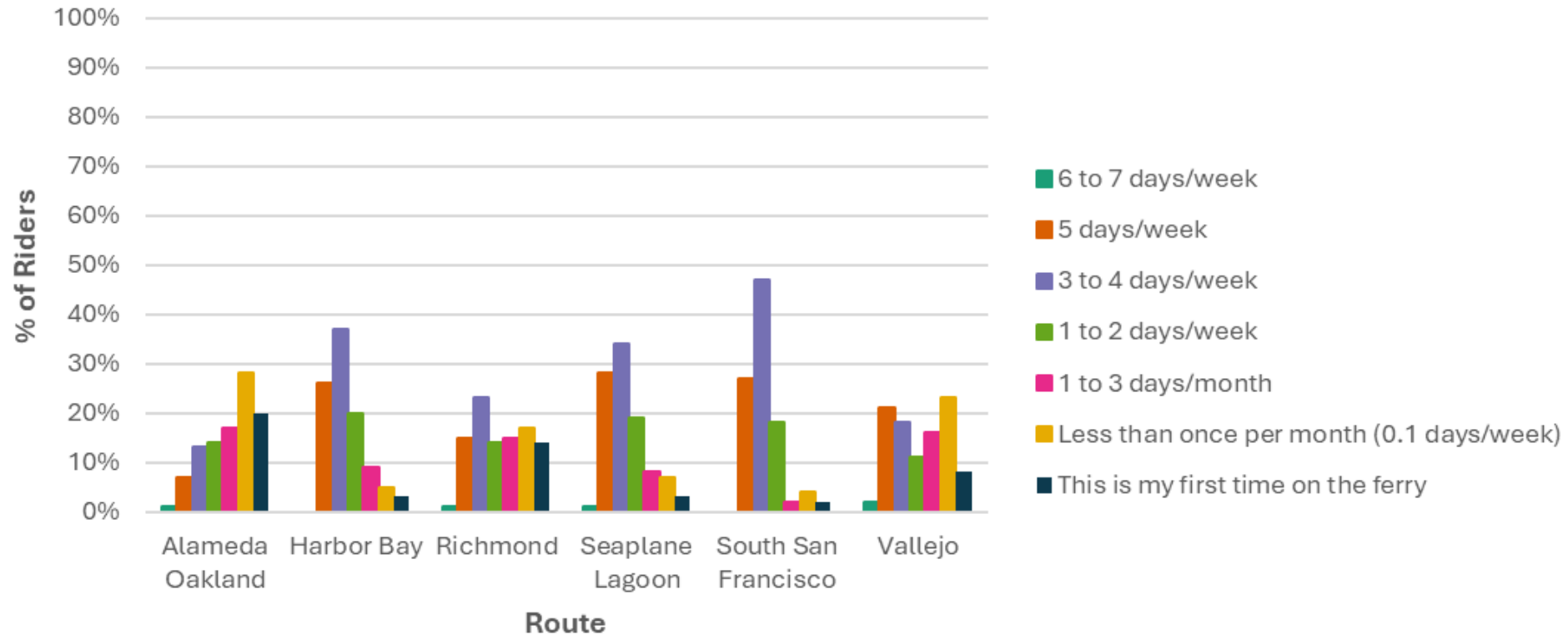


Figure 7. Proportion of Ridership Frequency by Route

The SSF route had the highest proportion of riders who used the service more frequently (3–4 days a week).

HIGHLIGHTS



The SSF route has consistently underperformed relative to the overall SF Bay Ferry system since the inception of the service in 2012



Ridership is less diverse by income and trip purpose than overall SF Bay Ferry System



SF Bay Ferry needs to consider the long-term financial sustainability of the entire operation and improve efficiency where possible

HOW WOULD YOU RE-IMAGINE THE SOUTH SAN FRANCISCO FERRY SERVICE?



Public/private partnerships



Service and fare changes



Regional context



New operating models



Current rider needs



Future rider needs

EXAMPLE SERVICE ADJUSTMENTS

- Potential concepts for increasing ridership, service productivity, and promoting financial sustainability:
 - Improve schedule
 - Fewer days of operation
 - Different operator
 - Different vessel
 - Route reconfiguration
 - Others?

PUBLIC OUTREACH PROCESS

South SF Service Website: <https://sanfranciscobayferry.com/south-sf-study/>

- Includes project overview, updates, and email-sign up for future news
- Will include opportunities for feedback

Public Outreach Event:

- SF Bay Ferry will plan an in-person event for members of the public to share feedback and ask questions
- SF Bay Ferry is seeking event suggestions

Marketing Assistance:

- SF Bay Ferry will share all marketing materials and project news with the working group and would appreciate sharing/promotion

NEXT STEPS

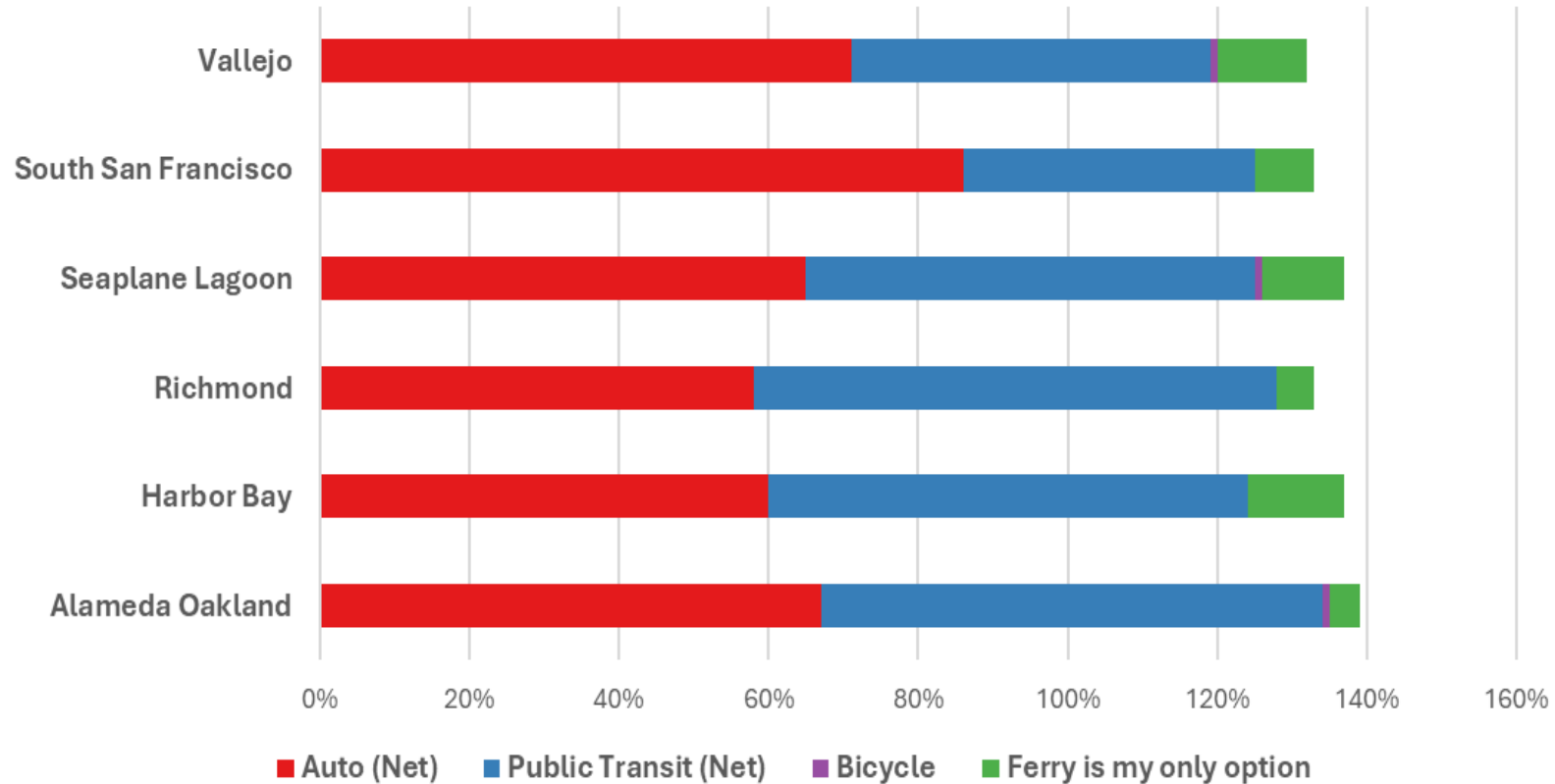
- Intake ideas from Working Group from today's discussion, prepare list and initial analysis of potential service restructuring options for WG Meeting #2
- Schedule WG Meeting #2 for August 2025
- Brief local and regional officials, as requested
- Any questions please contact: dorry.funaki@sfbayferry.com

Thank you

FINANCIAL PERFORMANCE

- The **RM3 Operating Plan** outlines performance measures to ensure services are:
 - Financially well-managed
 - Responsive to customer needs
 - Aligned with regional goals
- **Farebox recovery** is a key financial metric for measuring performance. RM3 performance thresholds evaluate whether:
 - The annual farebox requirement is equivalent to regional express bus service, or
 - The farebox ratio has demonstrated measurable growth in farebox recovery rate year-over-year

RIDERSHIP CHARACTERISTICS



- 86% of SSF riders having a car available for their use.

Figure 8. Proportion of Rider Mode Dependency by Route

BACKGROUND – TRAVEL TIME COMPARISON

- Despite being time competitive, the South San Francisco ferry route has not been effective in attracting strong ridership.

Mode	Travel Time (Jack London → Oyster Point) ¹	Cost
Ferry	40 minutes	\$7.40
Rail + Bus ²	1 hour 29 minutes	\$10.45
Car	40 minutes – 1 hour 15 minutes	\$14.00 ³

¹ Morning commute

² AC Transit, BART, and SamTrans

³ Based on IRS standard mileage rate