

**Summary Report**  
2022 On-Board Passenger Survey



***San Francisco Bay Ferry***

November 2022

# Acknowledgements

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The logo for WETA, consisting of the letters 'WETA' in a bold, blue, sans-serif font.The logo for CDM Smith, with 'CDM' stacked above 'Smith' in a bold, blue, sans-serif font.

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# Section 1

## Introduction

### 1.1 Project Information

The San Francisco Bay Area Water Emergency Transportation Authority (WETA) is a regional public transit agency providing a water transportation system in the Bay Area. WETA provides ferry services, known by the brand name San Francisco Bay Ferry, connecting San Francisco with the East Bay and North Bay, and South San Francisco with the East Bay. WETA operates San Francisco Bay Ferry using twelve terminals located in the cities of Alameda, Oakland, Richmond, San Francisco, South San Francisco, and Vallejo – four are located in San Francisco (Downtown San Francisco, Pier 41, Oracle Park and Pier 48/Chase Center Terminals), three in Alameda (the Main Street Alameda, Alameda Seaplane and Harbor Bay Terminals), two in Vallejo (the Vallejo and Mare Island Terminals), and one each in Oakland, Richmond and South San Francisco. Currently, San Francisco Bay Ferry operates year-round service for the following six routes:

- Oakland & Alameda: Weekday and weekend service connecting Oakland, Main Street Alameda, and Downtown San Francisco
- Alameda Seaplane: Weekday service between Alameda Seaplane in western Alameda and Downtown San Francisco
- Harbor Bay: Weekday service between Harbor Bay in southern Alameda and Downtown San Francisco
- South San Francisco: Weekday commute service connecting South San Francisco, Oakland, and Main Street Alameda
- Richmond: Weekday and weekend service between Richmond and Downtown San Francisco
- Vallejo: Weekday and weekend service connecting Vallejo, Mare Island and Downtown San Francisco

San Francisco Bay Ferry provides seasonal service between Oakland, Main Street Alameda, Vallejo, and Oracle Park for San Francisco Giants games. It also provides seasonal service between Oakland, Main Street Alameda, and Pier 48/Chase Center in San Francisco for Golden State Warriors games. The existing ferry routes and terminals are illustrated in **Figure 1-1**.

WETA periodically conducts its systemwide on-board passenger survey to gather passenger feedback about the San Francisco Bay Ferry's performance; understand the service/catchment area of each route; review ferry operations; and plan adjustments or improvements to its services, facilities, and connectivity to terminals. This report provides a summary of the results from the 2022 On-board Passenger Survey, the fifth such survey WETA has conducted. The last survey was done in the winter of 2021.



Source: San Francisco Bay Ferry (<https://sanfranciscobayferry.com>)

Figure 1-1 San Francisco Bay Ferry Routes and Terminals

## 1.2 Data Collection Overview

### 1.2.1 Survey Routes

The 2022 On-Board Passenger Survey was conducted for the six ferry routes that are currently in operation:

- Oakland & Alameda
- Alameda Seaplane
- Harbor Bay
- South San Francisco
- Richmond
- Vallejo

The following routes were also surveyed on a weekend:

- Oakland & Alameda
- Richmond
- Vallejo

### 1.2.2 Survey Methodology

The survey was conducted based on guidelines provided by WETA. The survey was designed to:

- Be completed using an online questionnaire
- Be conducted on three consecutive mid-weekdays and two consecutive weekend days
- Capture ferry trips that represent the morning commute, midday, and evening commute.

The ferry vessel trips identified for surveying were selected to maximize passenger access and ensure a variety of departure windows were sampled. The surveys were conducted on Tuesday, July 12, Wednesday, July 13, Thursday, July 14, Saturday, August 27, and Sunday, August 28. The survey sampling plan is included in **Appendix A**.

The survey questionnaire was developed by WETA. The survey questionnaire is included in **Appendix B**.

The on-board surveys were administered by National Data & Surveying (NDS) by distributing cards to ferry riders that had a QR code and link to the online questionnaire. The online survey was available in English, Spanish and Mandarin languages.

## 1.3 Data Analysis Methodology

The survey data was evaluated and summarized by ferry route. The survey was conducted for a sample of ferry patrons intended to sufficiently represent the profile of passengers on each of the in-service routes. Because the response rates differed on each of the routes and because it was desired to meaningfully compare results of one route against the other, a weighting process was used to normalize the data between routes. Survey results are typically weighted when it is required to:

- Have the survey statistics be representative of the underlying population, or
- Compensate for over- or under-sampling of specific cases or for disproportionate stratification.

Weighting the survey involves developing weighting factors for segments of the survey data by comparing it to total ridership data. WETA provided average weekday ridership for each ferry route from July and August 2022 passenger counts. By comparing this ridership count with the number of surveys collected on each route, weighting factors were developed for each ferry route. Weekday data collected on the Oakland & Alameda and Alameda Seaplane routes were combined for the purposes of data weighting due to data limitations.

This same methodology was used for the past three on-board surveys for WETA, so this approach also provides for the ability to accurately compare the results of the 2022 survey with past surveys.

For example, the average midweek ridership for the Richmond route during the survey week was 766 passengers, while 155 survey responses were collected for this route. The weighting factor applied to weekday surveys for this route is 4.9 (766/155), or the average number of riders per survey response. The weighting factors used for the ferry routes surveyed are provided in **Tables 1-1 and 1-2**.

**Table 1-1 Weekday Weighting Factors**

Ferry Route	Number of Survey Responses	Average Daily Ridership <sup>1</sup>	Weighting Factor
Alameda/Oakland & Alameda Seaplane Route	204	2,387	11.7
Vallejo Route	144	2,139	14.9
Richmond Route	155	766	4.9
Harbor Bay Route	91	582	6.4
So. San Francisco Route	36	214	5.9

Notes:

<sup>1</sup>From July 11-15, 2022.

**Table 1-2 Weekend Weighting Factors**

Ferry Route	Number of Survey Responses	Average Daily Ridership <sup>1</sup>	Weighting Factor
Alameda/Oakland Route	177	3,000	16.9
Vallejo Route	125	1,431	11.4
Richmond Route	31	365	11.8

Notes:

<sup>1</sup>From August 27-28, 2022.

Individual survey responses were then multiplied by these weighting factors and multiplied by days in a week factor by day type (five for weekdays, two for weekends), so that when summed, the total number of responses would equal the weekly total ridership and would represent average weekly ridership. By weighting the survey results, totals and percentages for summary statistics better reflect the overall demographics and preferences of ferry riders.

## Section 2

# Survey Findings

A total of 630 weekday and 333 weekend surveys were collected as part of the 2022 On-Board Passenger Survey, for an overall total of 963 surveys. The results obtained by evaluating the survey data using the weighting factors as discussed in Section 1.3 are used in this chapter. The weighted survey results are segregated and illustrated by ferry route.

## 2.1 Demographics

### 2.1.1 Age

The age distribution of passengers by ferry route is illustrated in **Figure 2-1**. Minors (under 18 years of age) accompanied by adults are less likely to respond to the on-board surveys, so they are assumed to be under-represented in the survey sample and results.

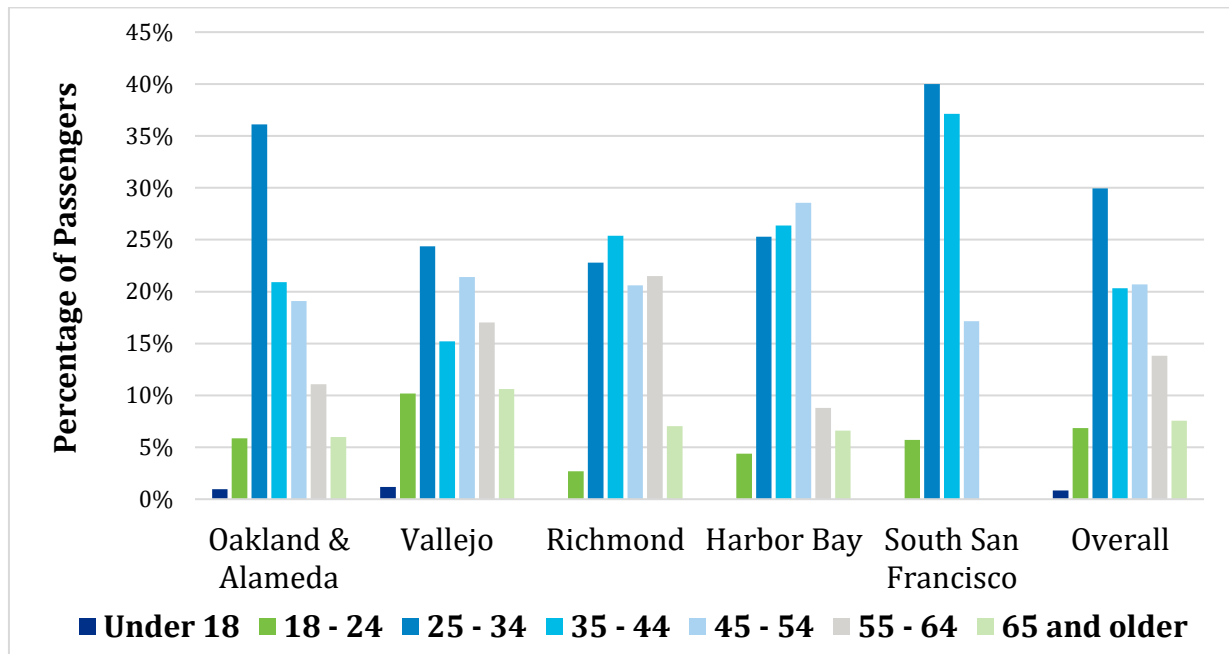


Figure 2-1 Age Distribution by Route

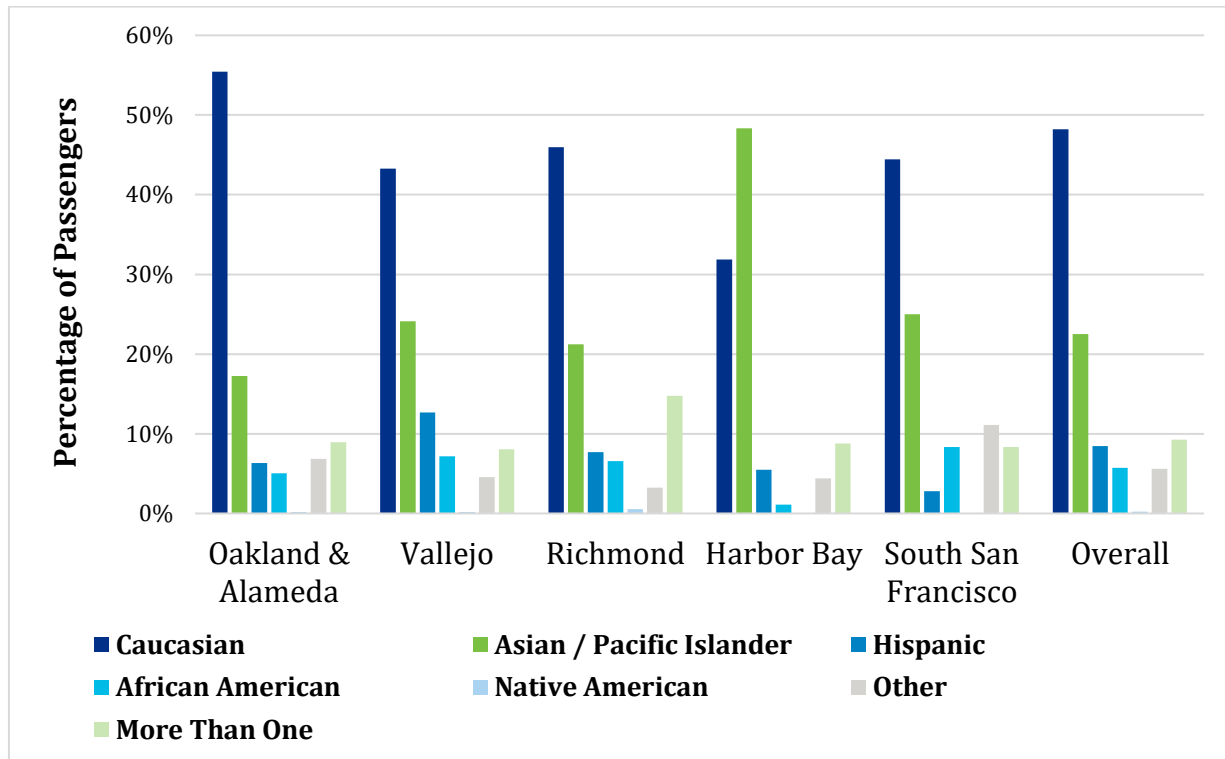
#### Key Results

- Overall, the majority (71 percent) of the riders are between 25 and 54 years of age. Of the remaining 29 percent, 14 percent are from the 55-64 age group, eight percent are 65 years and older, and the rest seven percent are minors (under 18 years of age).
- The 25-54 age group also forms the highest share of riders for all five routes. This age group share for Harbor Bay and South San Francisco routes is above 80 percent, and for the remaining routes the share lies between 61 and 76 percent.

- Non-commute trips include higher shares of riders under 18 years and 55 years and older (10 percent and 31 percent, respectively) compared to commute trips (7 percent and 17 percent, respectively).

### 2.1.2 Race/Ethnicity

The distribution of race/ethnicity of ferry patrons is shown in **Figure 2-2**.



**Figure 2-2 Race/Ethnicity by Route**

#### Key Results

- Overall, Caucasian riders constitute a plurality (48 percent), followed by Asian/ Pacific Islander riders at 23 percent, Hispanic/Latino riders at nine percent, African American riders at six percent, Native American riders at less than one percent, and others at six percent. Nine percent of the riders report more than one race/ethnicity.
- The Harbor Bay route has the highest share of Asian/ Pacific Islander riders of 48 percent, which exceeds the share of Caucasian riders (32 percent) on this route. Other routes show small variations compared to the overall race/ethnicity distribution.
- No discernable differences were found between commuters and non-commuters in the terms of race/ethnicity distribution.
- Ferry riders' race/ethnicity is not always consistent with the demographics of the municipality that the ferry serves. On the Oakland & Alameda route, Caucasians are overrepresented while African Americans and Hispanic/Latinos are underrepresented. For the Richmond route, Caucasians are overrepresented while Asian/Pacific Islanders,

Hispanic/Latinos and African Americans are underrepresented. On the Vallejo Route, Hispanic/Latinos and African Americans are slightly underrepresented<sup>1</sup>. It is important to note that this comparison of ferry passenger versus community demographics does not account for the location of the ferry terminal within the surrounding community as compared to other modes nor does it consider that the terminal may draw ridership from other municipalities outside the one in which the terminal is located

### 2.1.3 Annual Household Income

The distribution of riders' annual household income is illustrated in **Figure 2-3**. The distribution of weekday commute riders' annual income is illustrated in **Figure 2-4**.

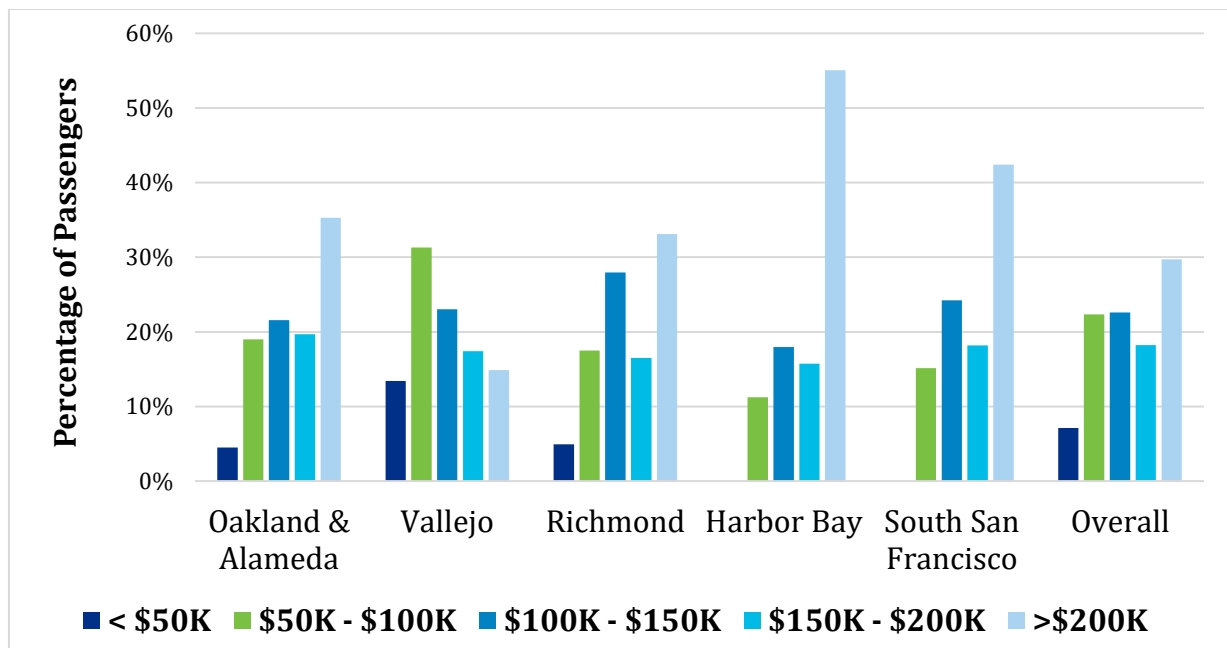
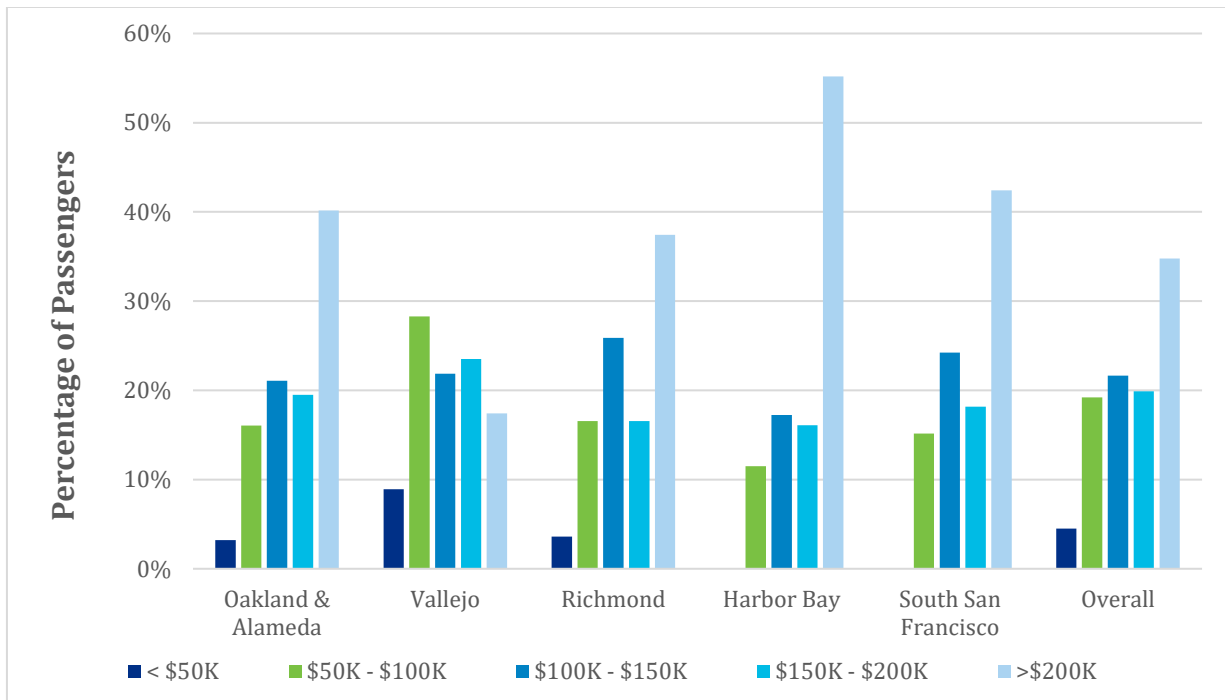


Figure 2-3 Annual Household Income by Route

<sup>1</sup> US Census Quick Facts for Cities of Alameda, Oakland, Richmond and Vallejo: <https://www.census.gov/quickfacts/fact/table/vallejocitycalifornia.richmondcitycalifornia.alamedacitycalifornia.oaklandcitycalifornia.CA/PST045219> (last accessed on November 1, 2021)



**Figure 2-4 Annual Household Income by Route- Commuters**

### Key Results

- Overall, seven percent of ferry riders have an annual household income of less than \$50,000, 22 percent are in the \$50,000-\$100,000 range, 23 percent in the \$100,000-\$150,000 range, 18 percent in the \$150,000-\$200,000 range, and 30 percent in the more than \$200,000 range.
- The Vallejo route has the highest share of riders in the \$50,000-\$100,000 range of annual household income (31 percent). The Harbor Bay and South San Francisco routes have the highest shares of riders in the more than \$200,000 range of annual household income (55 percent and 42 percent, respectively).
- Non-commuters have a higher share (42 percent) of riders with annual household income less than \$100,000 than all users combined (29 percent), while commuters have a slightly higher share (35 percent) of riders with annual household income more than \$200,000 than all users combined (30 percent).
- Compared with the demographics of the closest municipality that the ferry serves, those with an annual household income of less than \$50,000 are underrepresented across all routes while those with an annual household income \$150,000 or more are overrepresented across all routes. However, San Francisco Bay Ferry service is largely structured to provide commute period trips to the economic centers of Downtown San Francisco and South San Francisco, which could skew the income profiles of those who ride as compared to the profiles for the region as a whole.

### 2.1.4 English Proficiency

Every survey respondent indicated that they either speak English very well (95 percent) or well (four percent). Proficiency in English varies over a narrow range of 91-97 percent across the routes. The survey was multilingual in order to facilitate responses from non-English speakers. Out of the 963 survey responses, over 99 percent were filled in English, and less than one percent were filled in Spanish (5 responses) and Mandarin (2 responses).

## 2.2 Ferry Usage

### 2.2.1 Frequency of Ferry Use

The distribution of riders' frequency of ferry use are provided separately for commuters and non-commuters in **Figures 2-5** and **2-6**. Harbor Bay and South San Francisco have limited or no non-commute trips in the survey sample, hence they are not included in **Figure 2-6**.

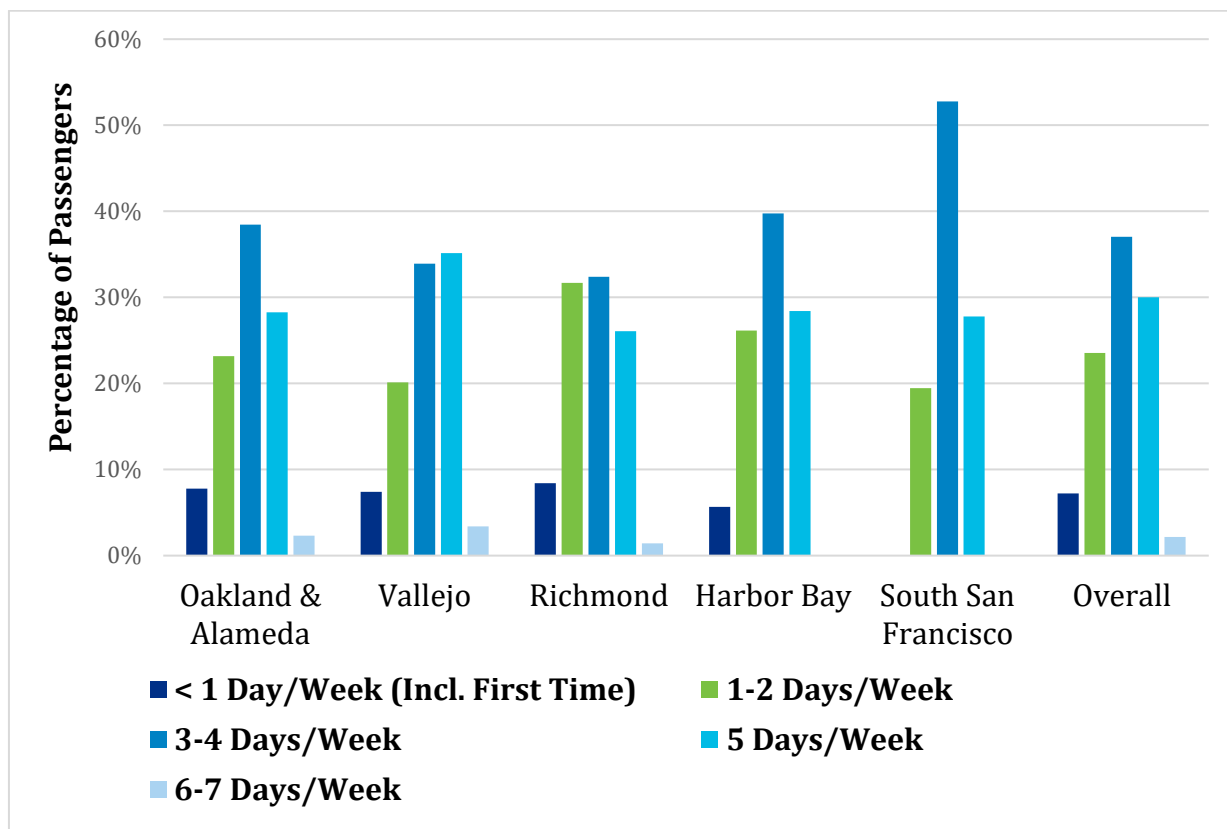


Figure 2-5 Frequency of Ferry Use by Route - Commuters

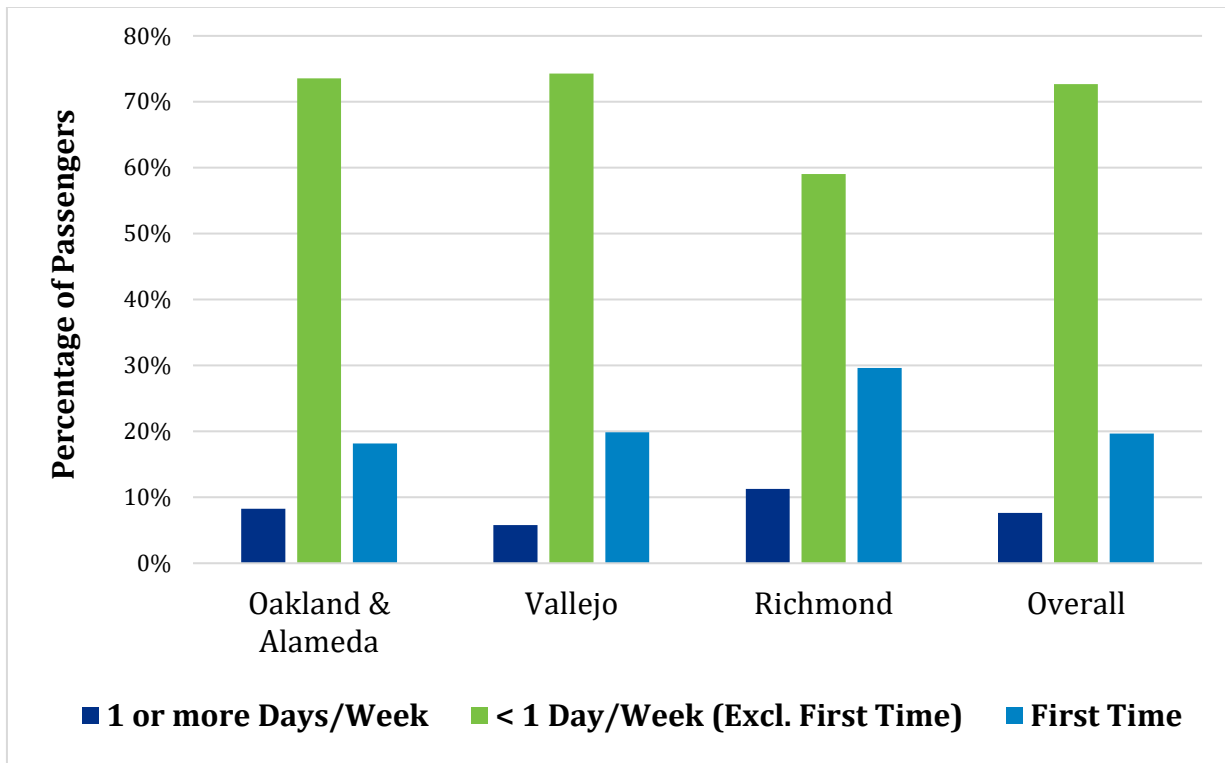


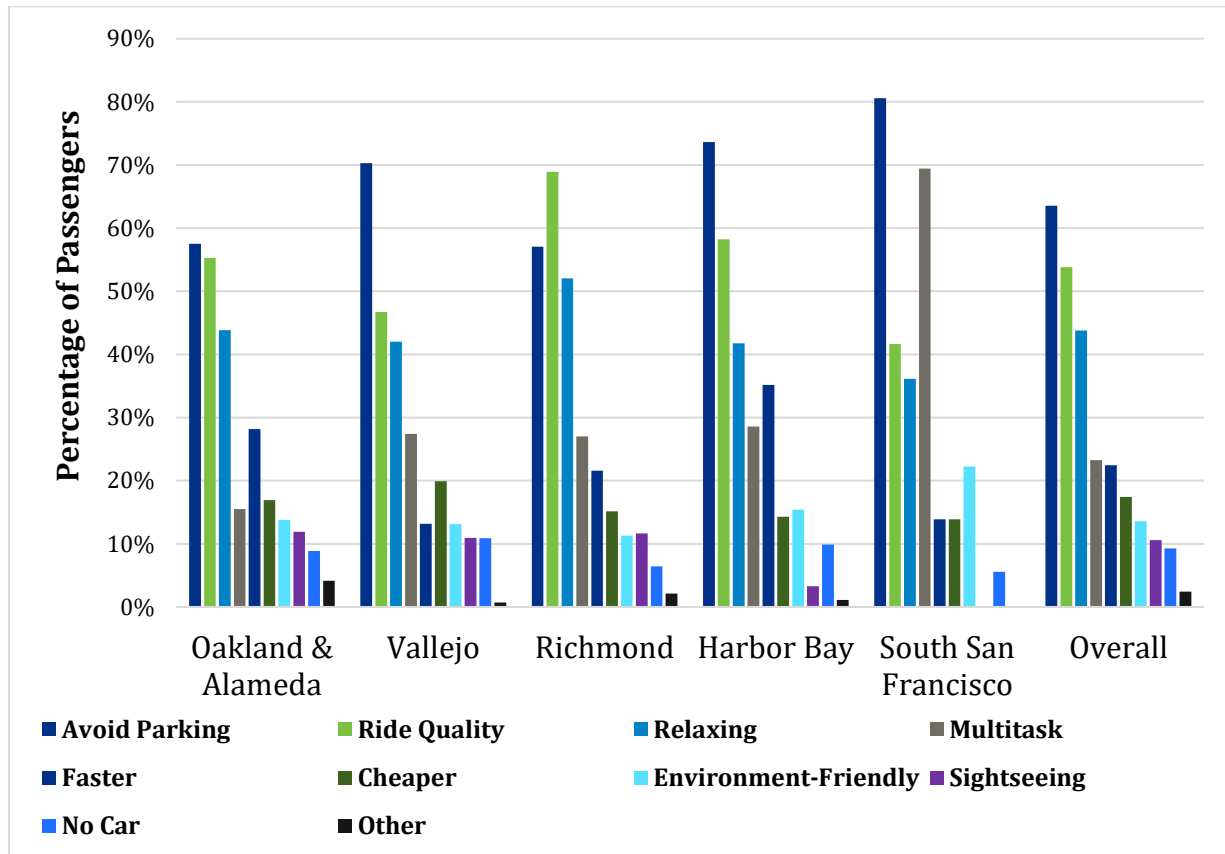
Figure 2-6 Frequency of Ferry Use by Route – Non-Commuters

#### Key Results

- Systemwide, 69 percent of all commuters ride three days or more per week. This percentage is the highest for the South San Francisco route (81 percent) and ranges between 60-72 percent for the remaining routes.
- Twenty four percent of commuters ride the ferry one-to-two days a week, likely reflecting a continued post-pandemic remote and hybrid work environment offered by many large employers in the commute markets served by the ferry.
- The remaining seven percent of the commuters are occasional users of ferry for work, riding less than 1 day per week (including first time users) for commute. The Richmond route has the highest share of occasional riders of 40 percent and ranges between 19-32 percent for the remaining routes. This can also likely be attributed to employers offering continued remote and hybrid work environments
- Among non-commuters across all routes, 73 percent of the riders use ferry less than 1 day per week (excluding first time users). First-time riders for non-commute trip purpose constitute 20 percent of the patronage, with the highest of 30 percent for the Richmond route.

## 2.2.2 Reasons for Ferry Use

Riders' reasons for riding a ferry are illustrated in **Figure 2-7**. These include multiple selections by passengers, who were allowed to indicate more than one reason in their response.



**Figure 2-7 Reasons for Ferry Use by Route**

### Key Results

- Overall, the top three reasons for choosing the ferry are avoiding traffic and parking issues (64 percent of the riders), the quality of the ride in comparison to other modes (54 percent of the riders) and reducing stress due to the relaxing nature of a ferry ride (44 percent of the riders).
- Individual routes share mostly the same top three reasons for using the ferry, the exception being South San Francisco where the ability to multitask (69 percent) is ranked second by riders below avoiding traffic and parking issues (81 percent).
- Twenty-three percent of riders indicated that the ability to multitask on the ferry was most important to them. Also, 23 percent of riders responded that their most important reason for using the ferry was that the ferry is faster, and 17 percent of riders find that ferry is cheaper than other options available for their travel and thus played a role in their decision to use the ferry. These ranked fourth, fifth and sixth overall, respectively.

- The Harbor Bay route had the highest share of riders that consider that the ferry is a faster option than other modes (35 percent).

## 2.3 Trip Characteristics

### 2.3.1 One-Way Trips

Overall, ten percent of riders took one-way trips. The Vallejo route had the highest share with 15 percent of riders taking one-way trips and the South San Francisco route had the lowest share; no survey respondents took one-way trips.

### 2.3.2 Ticket Type

The distribution of ticket type used by passengers is shown in **Figure 2-8**.

#### Key Results

- Overall, 80 percent of passengers use a Clipper Card, 13 percent use a mobile ticket, and seven percent use a paper ticket.
- The proportion of passengers using a Clipper Card is the highest on the South San Francisco, Richmond, and Harbor Bay routes (97 percent, 93 percent, and 91 percent, respectively) and the lowest on the Vallejo route (69 percent). Eighty three percent of Oakland & Alameda and Alameda Seaplane route passengers use a Clipper Card.
- The survey sample was collected during WETA’s transition to a new integrated ticketing system for non-Clipper fare payment, which occurred in July 2022. While ticket types available remained the same in the new system, this change has made mobile tickets a more convenient option for passengers, particularly on the Vallejo route.

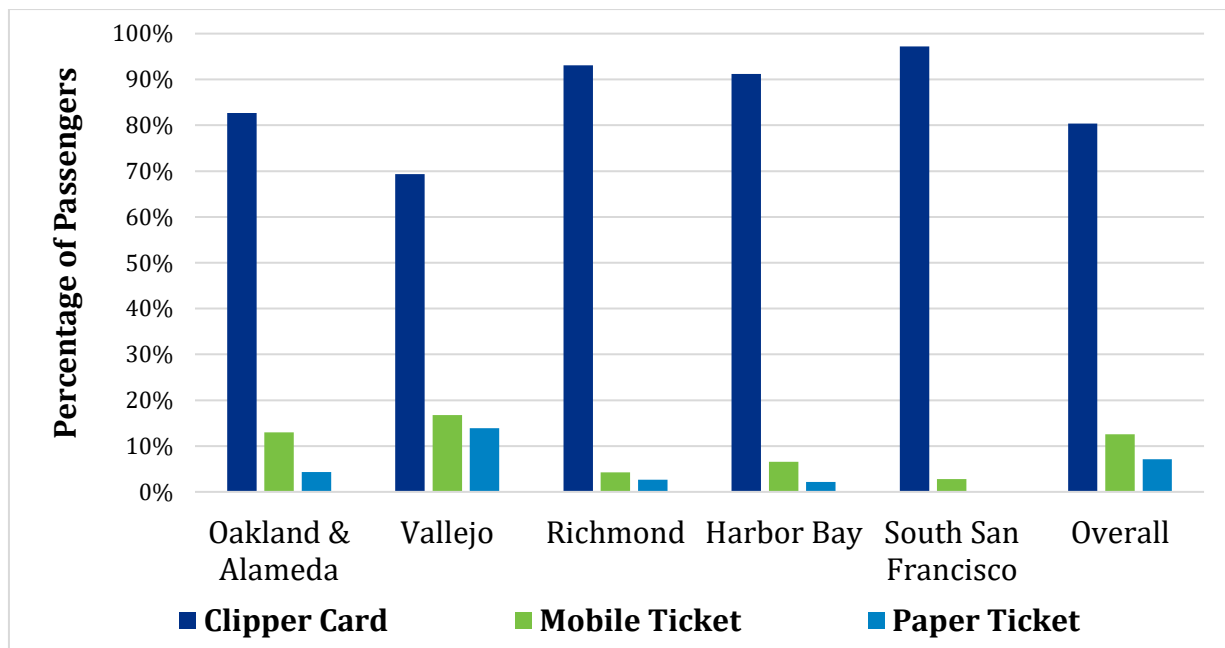


Figure 2-8 Ticket Type by Route

### 2.3.3 Fare Type

The majority of ferry riders, 91 percent, use the “adult” fare type. This varies from the lowest of 87 percent on the Vallejo route to 97 percent on the South San Francisco route. The “senior” fare type is the most common “non-adult” fare type used by patrons averaging six percent of overall ridership. The top three busiest routes (Oakland & Alameda, Vallejo, and Richmond) have similar rates of customers utilizing “senior” fare type. While the percentage share of “youth” fare type is less than 1 percent, minors (under 18 years of age) are under-represented in the survey sample, as previously mentioned. As such, “youth” ticket sales make up a higher share of overall fare types. “Disabled/Medicare” fare types also accounted for less than one percent of all riders.

### 2.3.4 Ferry Terminal Access

A summary of transportation modes used to access the ferry terminals is provided in **Figures 2-9** and **2-10**. This assumes that a rider would use the same mode for ingress and egress at a given ferry terminal. For example, if a survey respondent answered that they drove alone to the Vallejo terminal, it is presumed that when they returned to the Vallejo terminal later in the day, they drove alone to depart the terminal area.

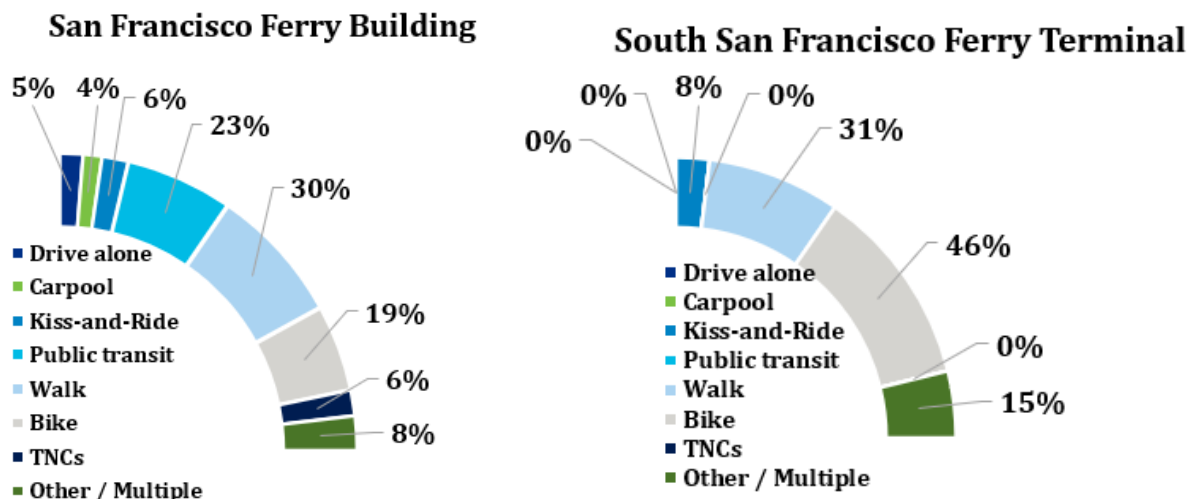


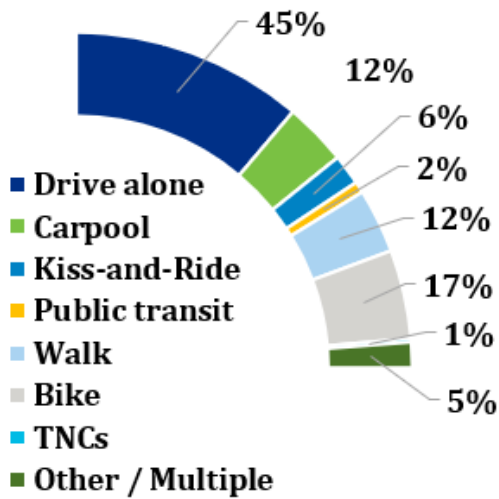
Figure 2-9 Access Mode – Destination Terminals

#### Key Results

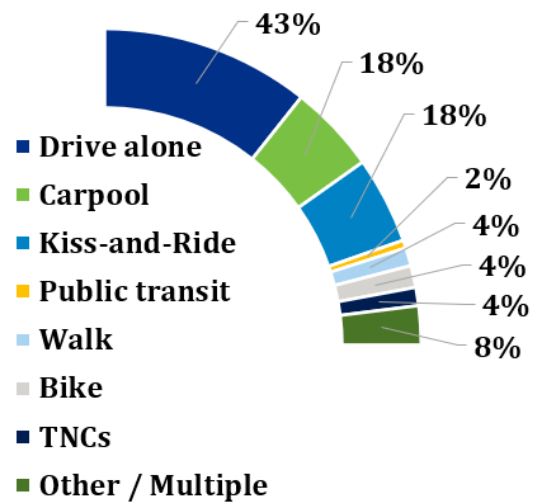
- At the San Francisco Ferry Building and the South San Francisco Ferry Terminal, which serve as the destination for most commute trips:
  - Walking and bicycling are the most common access modes with a combined mode share of 49 percent for the San Francisco Ferry Building and 77 percent for the South San Francisco Ferry Terminal.
  - For the San Francisco Ferry Building, public transit has the next highest mode share of 23 percent.

- Eight percent of customers accessing the San Francisco Ferry Building and 15 percent of customers accessing the South San Francisco Ferry Terminal use multiple modes or modes that required a write-in answer. An example of a common write-in answer is an electric scooter.
- Transportation network companies (TNCs), drive alone, carpool and kiss-and-ride mode shares range between 4-6 percent each at the San Francisco Ferry Building. Kiss-and-ride forms eight percent of the access mode share at the South San Francisco Ferry Terminal. TNCs refer to companies like Uber, Lyft, Gig Car Share, and other mobility service providers.

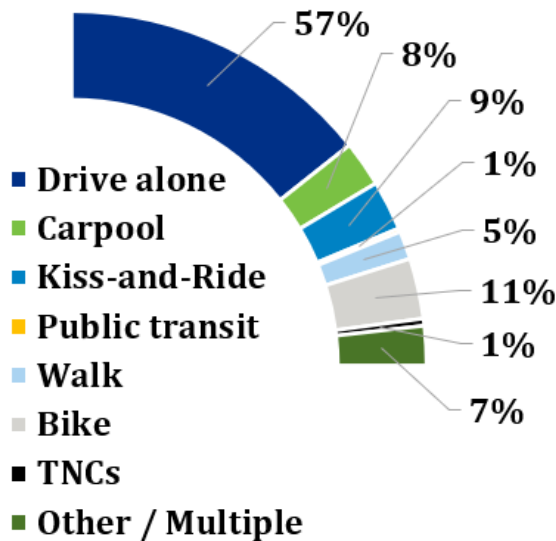
### Oakland & Alameda Ferry Terminals



### Vallejo Ferry Terminal



### Richmond Ferry Terminal



### Harbor Bay Ferry Terminal

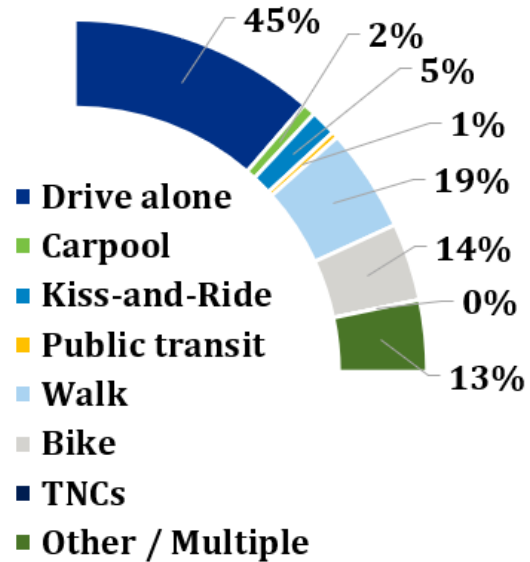


Figure 2-10 Access Mode – Origin Terminals

- At the East Bay and North Bay terminals, where most of the commute trips originate:
  - Overall, fewer than half of the trips to these terminals are drive alone trips (mode share ranges from 43 percent at the Vallejo Ferry Terminal to 57 percent at the Richmond Ferry Terminal).
  - Walking and bicycling (up to 33 percent mode share) are the second most used modes at the East Bay terminals, particularly at the Oakland & Alameda and Harbor Bay Ferry Terminals. Comparably, at the Vallejo terminal, this proportion is lower (8 percent).
  - Carpool and kiss-and-ride are the second most used mode at the Vallejo terminal (36 percent), while the East Bay terminals have a share ranging from seven to 18 percent.
  - Public transit has a negligible mode share at these terminals.

### 2.3.5 Trip Purpose

The distribution of passengers' trip purpose on weekdays and weekends are provided in **Figures 2-11** and **2-12**. There are no weekend services to South San Francisco and Harbor Bay, therefore these routes are not shown in **Figure 2-12**.

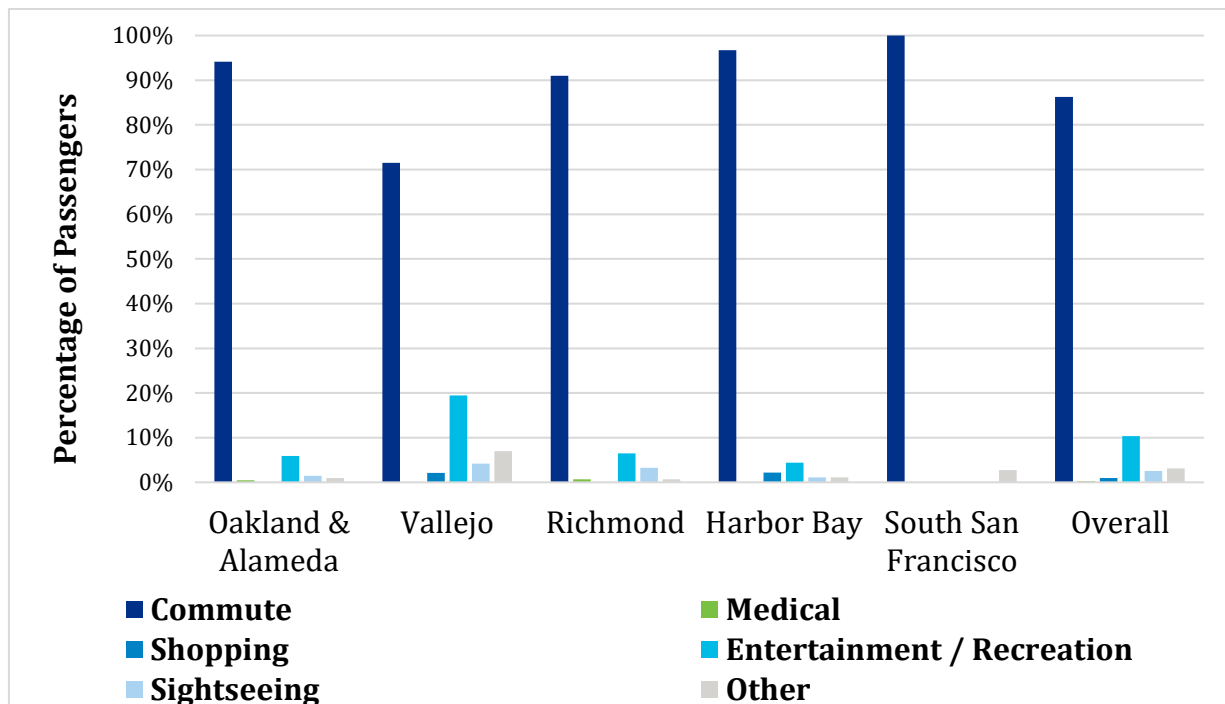


Figure 2-11 Trip Purpose by Route - Weekdays

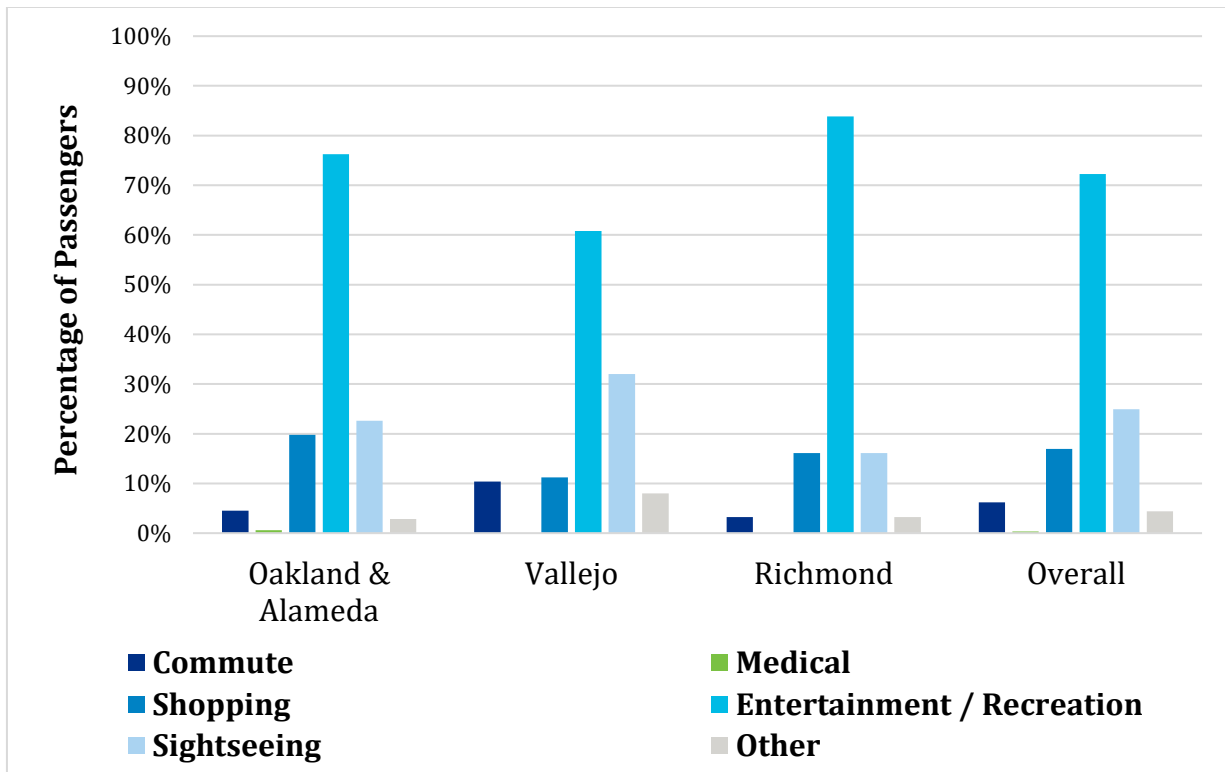


Figure 2-12 Trip Purpose by Route - Weekends

### Key Results

- On weekdays, the survey results show commuting is the most common trip purpose; 86 percent of ferry riders are commuters. This proportion is higher than 91 percent for most routes, the Vallejo route has the lowest value of 72 percent.
- Entertainment/Recreation is the next most common trip purpose for ferry riders on weekdays. At 19 percent, the Vallejo route has the highest proportion of entertainment/recreation-related riders.
- For all routes, other trip purposes on the weekdays together make up seven percent of the riders, with sightseeing being the highest contributor at three percent.
- Overall, on weekends entertainment/recreation forms the highest share of riders (72 percent). This varies in the range of 61 percent for the Vallejo route to 84 percent for the Richmond route.
- Sightseeing and shopping follow entertainment/recreation (25 percent and 17 percent, respectively) as top weekend trip purposes. Commute trips also form six percent of the ferry users on the weekends. Sightseeing and commute shares are the highest on the Vallejo route (32 percent and 10 percent, respectively). Shopping shares are the highest on the Oakland & Alameda routes (20 percent).

### 2.3.6 Alternative Transportation Options

Alternative transportation options available to the ferry riders are summarized in **Figure 2-13**.

*Key Results*

- About 11 percent of all patrons surveyed indicated that ferry is the only transportation mode available to them; this is highest for the Vallejo route at 13 percent.
- Bay Area Rapid Transit (BART)/Rail Transit is the topmost alternative mode for all routes combined. This ranges from 24 percent of passengers on the Vallejo route to 53 percent of passengers on the Richmond route.
- “Drive alone” is the second highest-ranking alternative mode for all routes combined. This varies from 27 percent of passengers on the Oakland & Alameda routes to 50 percent of passengers on the South San Francisco route.
- The remaining transportation options account for less than ten percent of the passengers each for all routes combined. The bus is an important option for the Oakland & Alameda routes at 10 percent and for the Harbor Bay route at 21 percent. Carpool and “casual” carpool are important options for the Vallejo route at a total of 18 percent.
- Employer shuttle is a typical write-in answer under other mode.

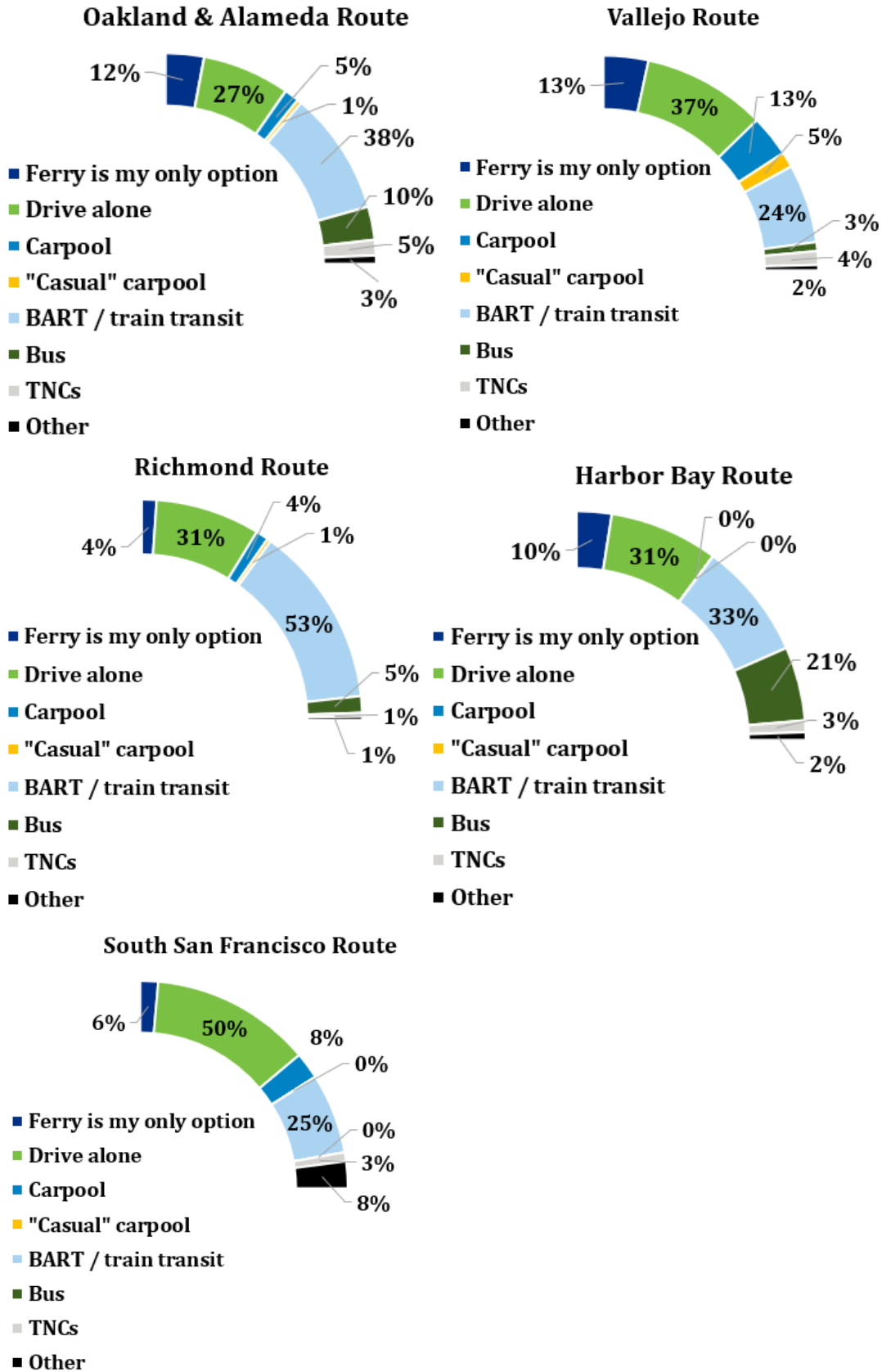


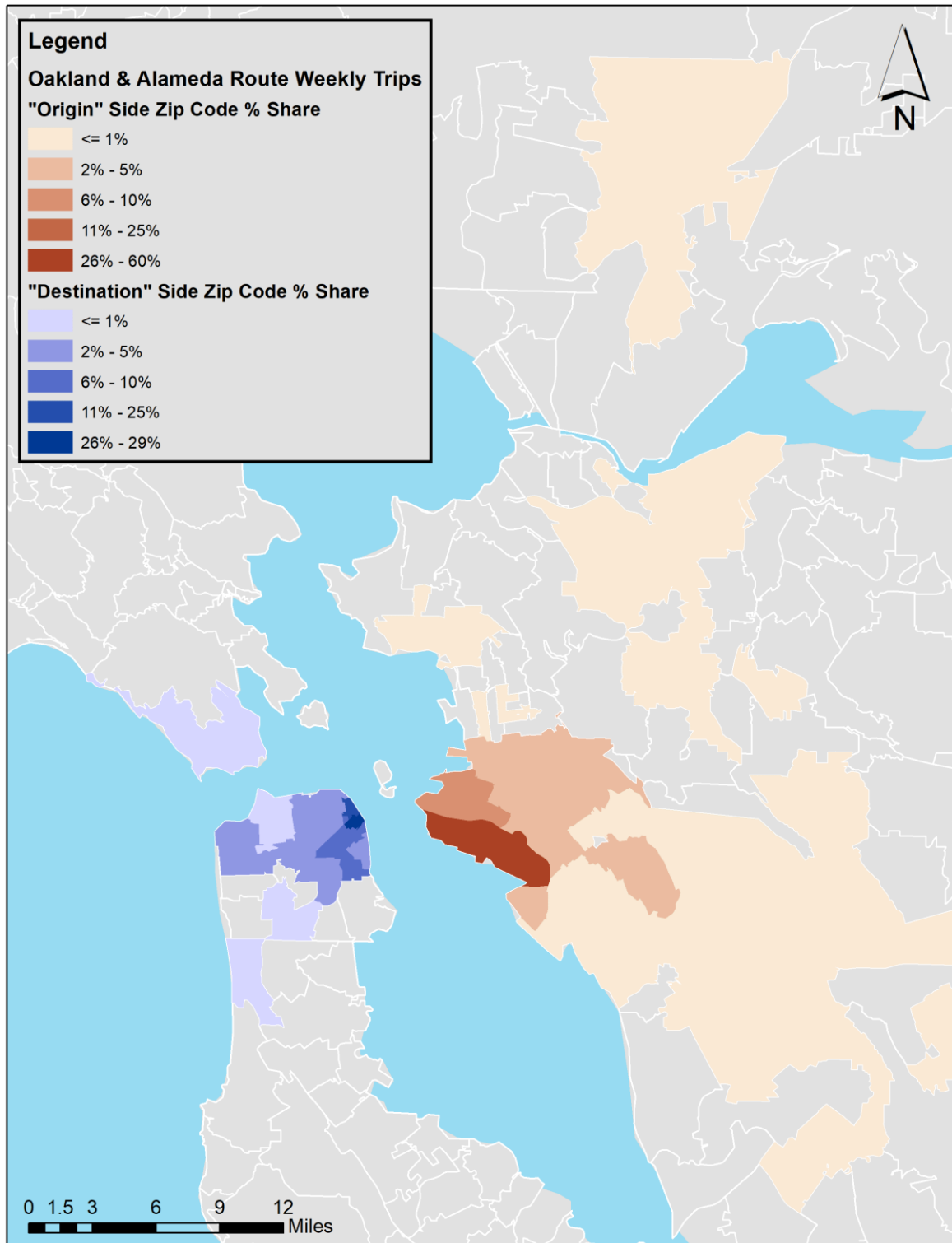
Figure 2-13 Alternative Transportation Options by Ferry Route

### 2.3.7 Origins and Destinations

The origins and destinations at zip code level for all surveyed passengers (commuters and non-commuters combined) on each ferry route are mapped in **Figures 2-14 through 2-18**. The percentage values reported in the maps represent the proportion of all surveyed riders for a particular route on a weekly total basis. Aside from the zip code data, customers were also asked whether they lived in San Francisco Bay Area or visited from elsewhere.

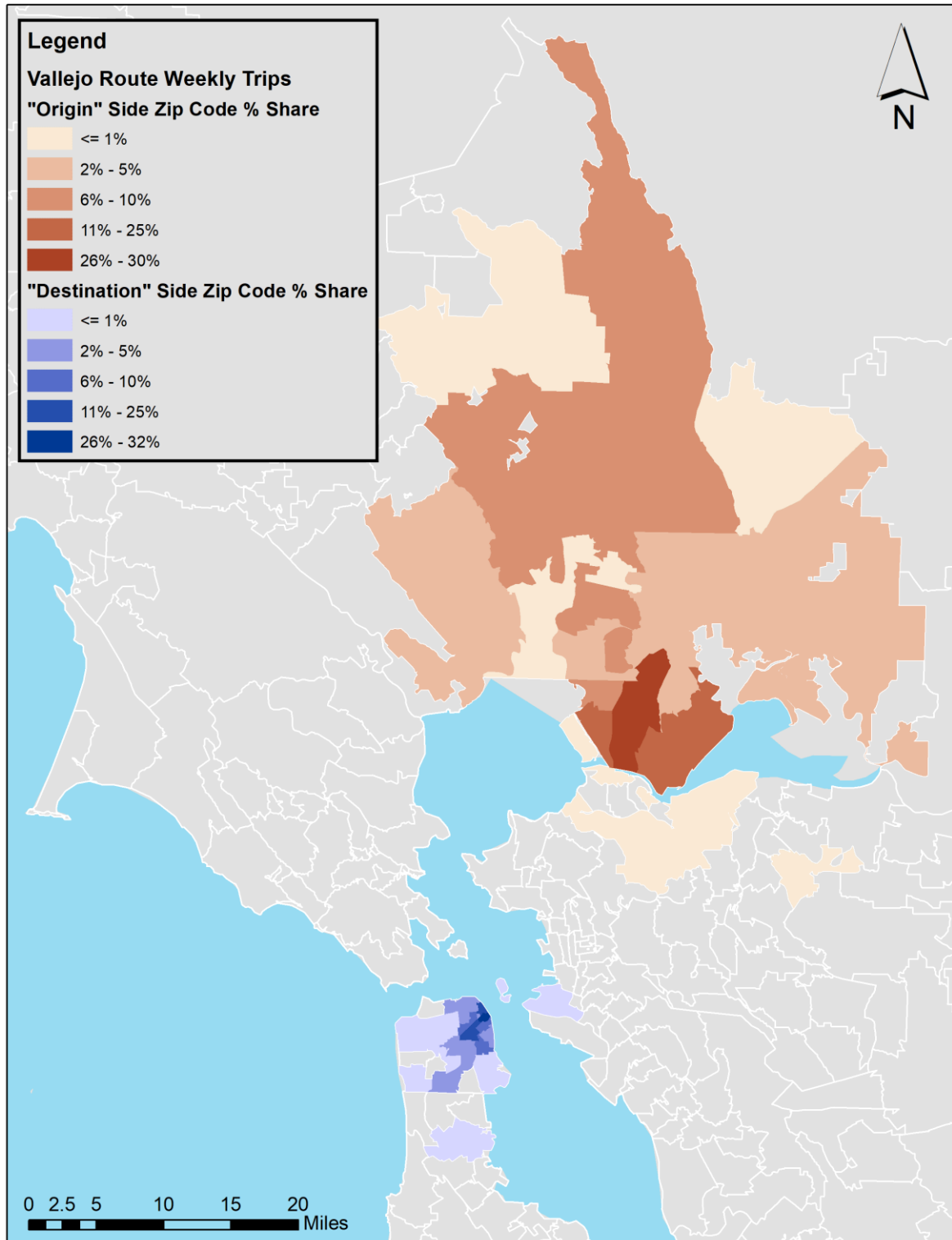
#### *Key Results*

- The San Francisco Ferry Building primarily serves downtown San Francisco and secondarily serves other parts of San Francisco.
- The Oakland and Alameda terminals primarily serve Oakland and Alameda, and secondarily serve the communities bordering Oakland, like Berkeley and San Leandro.
- The Harbor Bay terminal primarily serves Alameda, and secondarily serves East Bay communities like Oakland and San Leandro.
- The Richmond terminal primarily serves Richmond and secondarily serves neighboring communities such as San Pablo, El Cerrito, and Hercules.
- The Vallejo terminal has the largest service area, covering much of Solano County including Vallejo, Benicia, Fairfield, Vacaville, as well as Sonoma and Napa Counties.
- The South San Francisco terminal entirely serves South San Francisco. Riders on this route largely originate in Oakland and Alameda.
- About 86 percent of the customers lived in San Francisco Bay Area, and the remaining 14 percent are visitors to the Bay Area. The percentage of visitors was the highest on the Vallejo route (24 percent) followed by the Oakland & Alameda route (10 percent). The remaining routes have a visitor share of 5 percent or lesser.



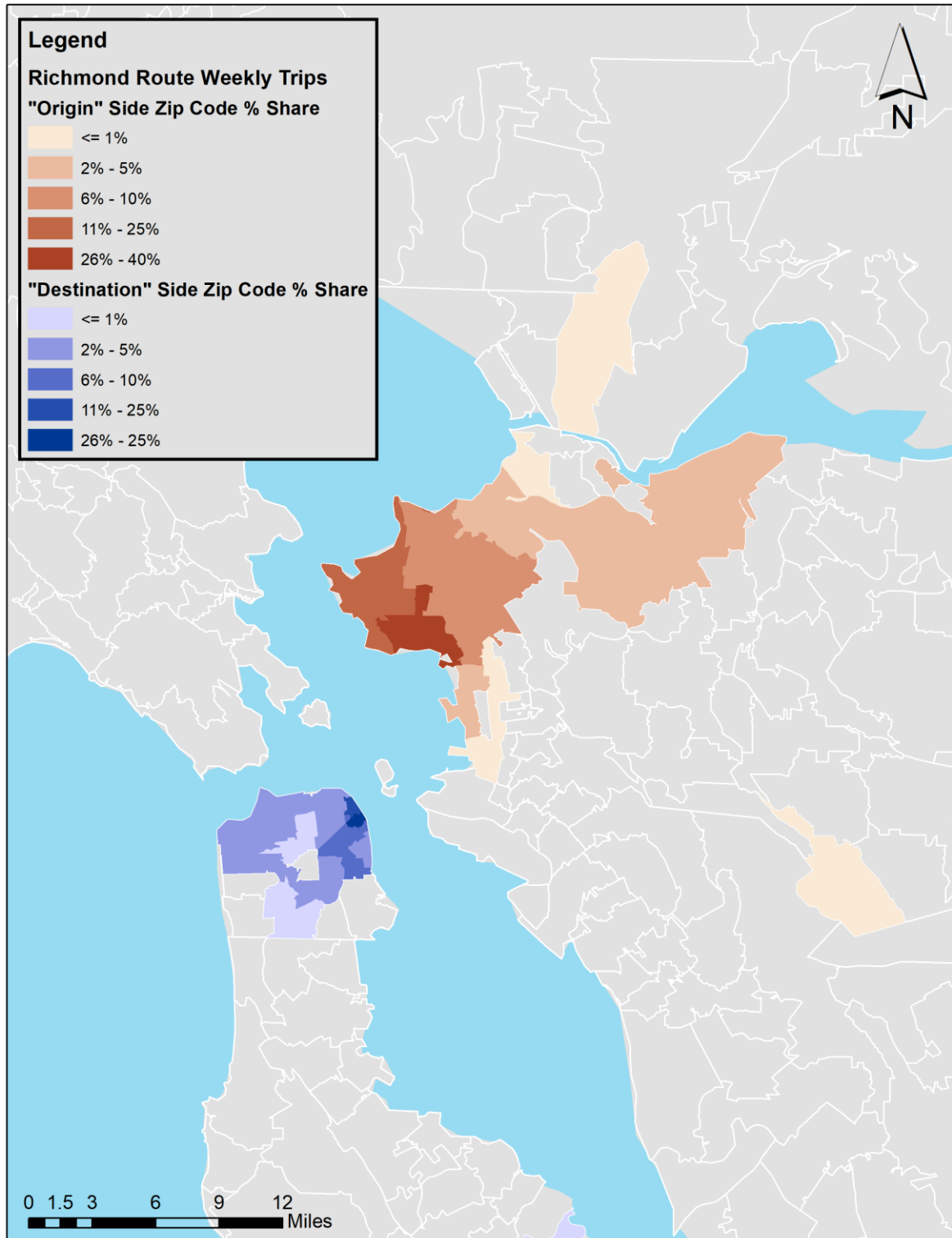
**Figure 2-14 Origins and Destinations: Oakland & Alameda and Alameda Seaplane Routes**

Note: "Origin" side is mostly the East Bay zip codes and includes departures from and arrivals to these zip codes. "Departure" side is mostly San Francisco zip codes and includes arrivals to and departures from these zip codes. Based on the survey data on this route, 1.1 percent of "Origins" and 13.2 percent of "Destinations" are unknown zip codes. Also, 1.8 percent of "Origins" and 0.0 percent of "Destinations" are zip codes outside San Francisco Bay Area. Weekly trips relating to the unknown zip codes and outside Bay Area zip codes are not included in the map above.



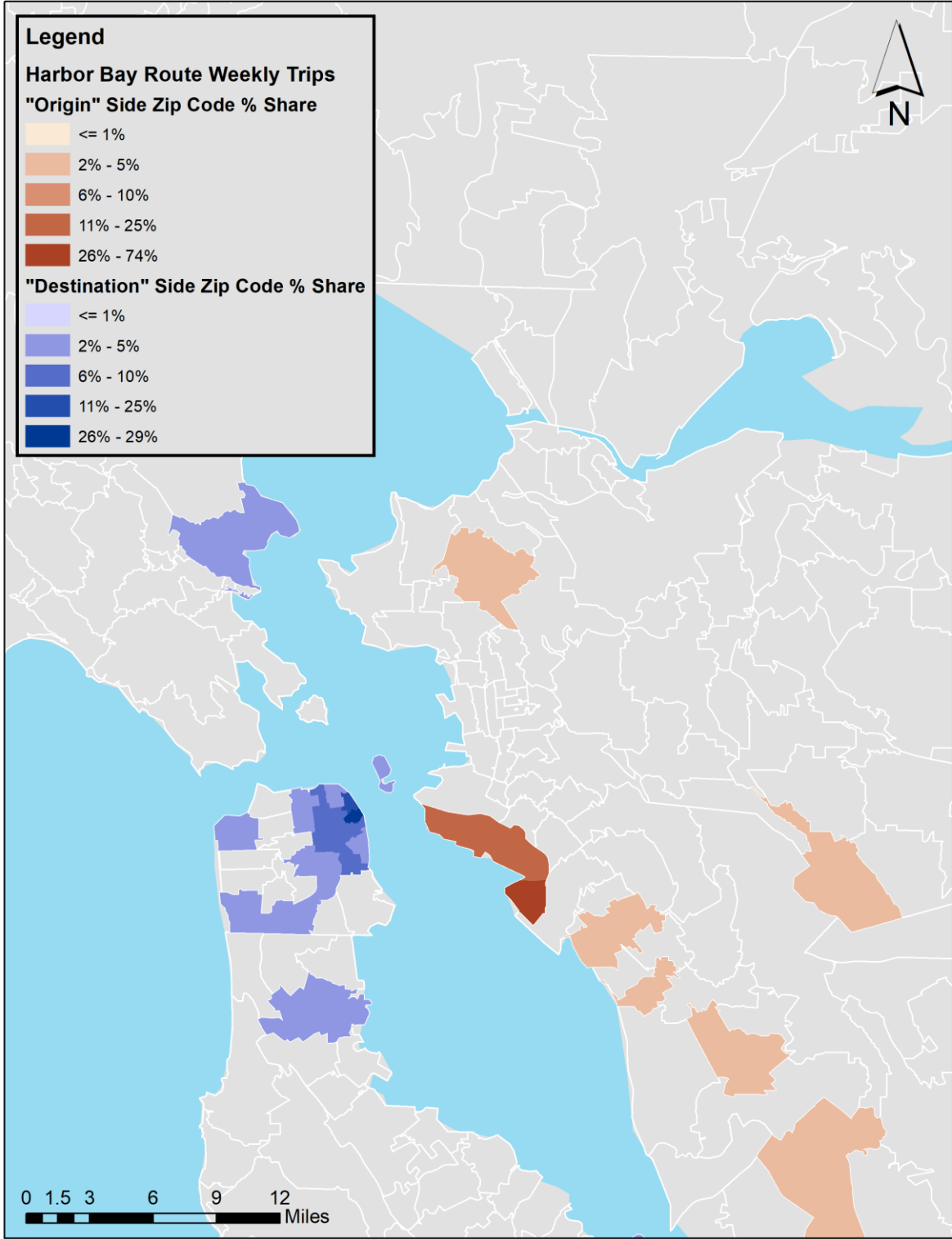
**Figure 2-15 Origins and Destinations: Vallejo Route**

Note: "Origin" side is mostly the North Bay zip codes and includes departures from and arrivals to these zip codes. "Departure" side is mostly San Francisco zip codes and includes arrivals to and departures from these zip codes. Based on the survey data on this route, 0.0 percent of "Origins" and 17.4 percent of "Destinations" are unknown zip codes. Also, 12.5 percent of "Origins" and 0.7 percent of "Destinations" are zip codes outside San Francisco Bay Area. Weekly trips relating to the unknown zip codes and outside Bay Area zip codes are not included in the map above.



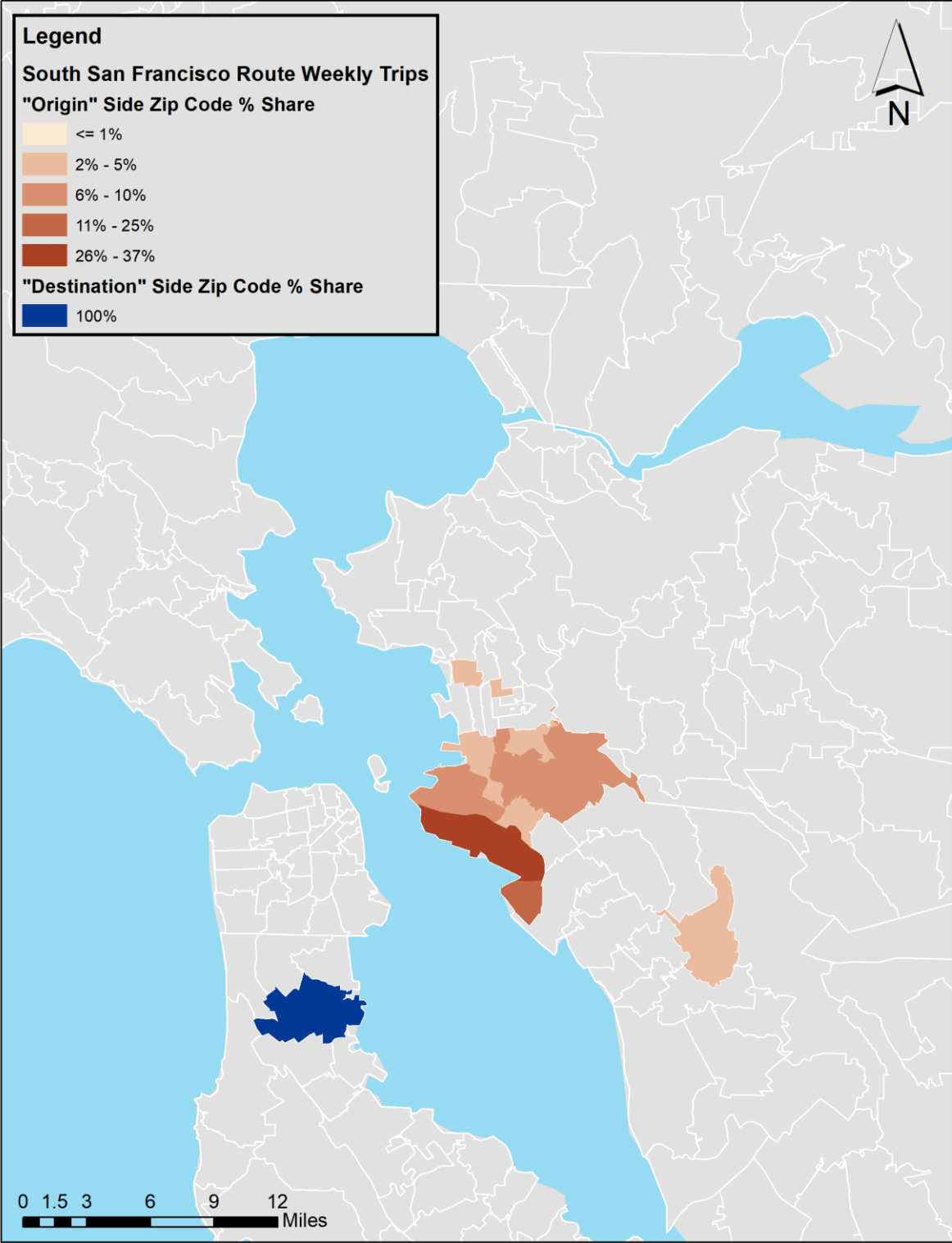
**Figure 2-16 Origins and Destinations: Richmond Route**

Note: "Origin" side is mostly the East Bay zip codes and includes departures from and arrivals to these zip codes. "Departure" side is mostly San Francisco zip codes and includes arrivals to and departures from these zip codes. Based on the survey data on this route, 3.7 percent of "Origins" and 7.5 percent of "Destinations" are unknown zip codes. Also, 0.0 percent of "Origins" and 1.0 percent of "Destinations" are zip codes outside San Francisco Bay Area. Weekly trips relating to the unknown zip codes and outside Bay Area zip codes are not included in the map above.



**Figure 2-17 Origins and Destinations: Harbor Bay Route**

Note: "Origin" side is mostly the East Bay zip codes and includes departures from and arrivals to these zip codes. "Departure" side is mostly San Francisco zip codes and includes arrivals to and departures from these zip codes. Based on the survey data on this route, 0.0 percent of "Origins" and 12.1 percent of "Destinations" are unknown zip codes. There are no "Origins" or "Destinations" with zip codes outside San Francisco Bay Area. Weekly trips relating to the unknown zip codes and outside Bay Area zip codes are not included in the map above.

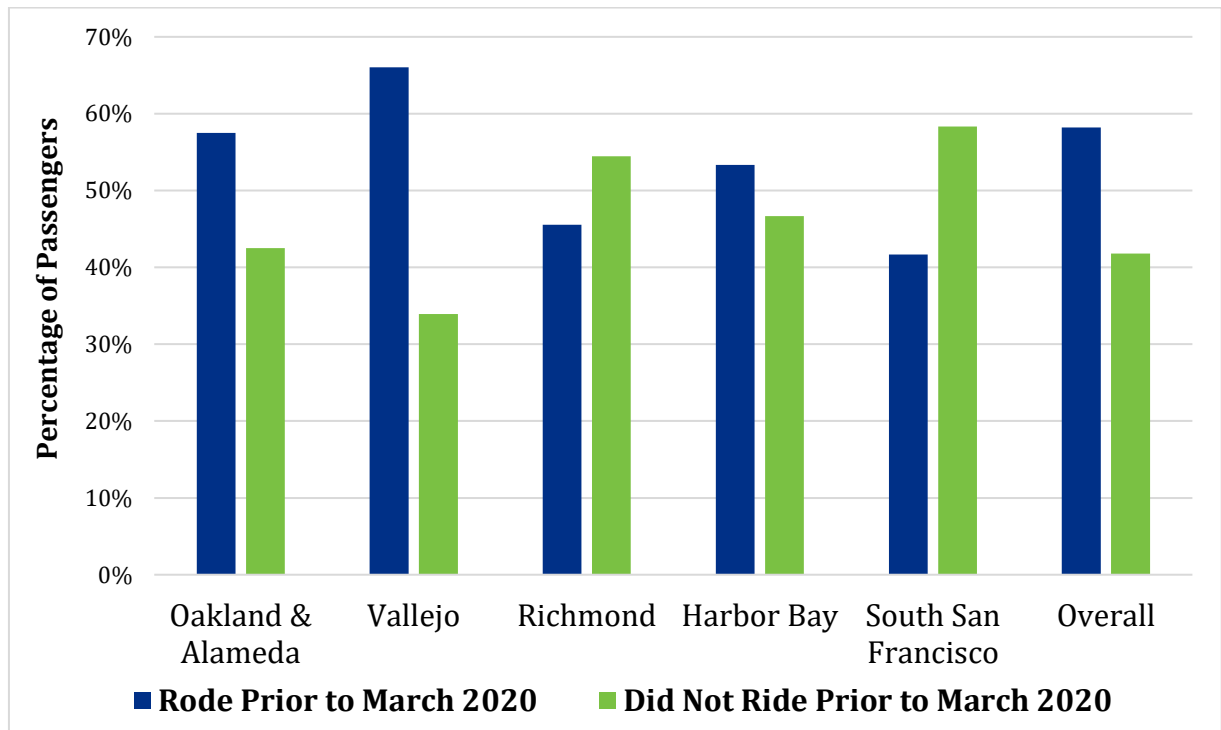


**Figure 2-18 Origins and Destinations: South San Francisco Route**

Note: "Origin" side is mostly the East Bay zip codes and includes departures from and arrivals to these zip codes. "Departure" side is 100% South San Francisco zip code of 94080 and includes arrivals to and departures from this zip code. Based on the survey data on this route, 2.8 percent of "Origins" and 0.0 percent of "Destinations" are unknown zip codes. There are no "Origins" or "Destinations" with zip codes outside San Francisco Bay Area. Weekly trips relating to the unknown zip codes and outside Bay Area zip codes are not included in the map above.

## 2.4 Ferry Usage prior to COVID-19 Pandemic

The 2022 On-Board Survey asked a question related to the COVID-19 pandemic and how it affected passenger behavior. The survey found that 58 percent of customers rode the ferry prior to the March 2020 COVID shelter-in-place order. This percentage varied across the routes from the lowest of 42 percent for the South San Francisco route to the highest of 66 percent for the Vallejo route. This is summarized in **Figure 2-19**.



**Figure 2-19 Ferry Usage Comparison Before and After March 2020**

## 2.5 Ferry Satisfaction

Two areas of customer satisfaction were surveyed: the experience of riding the ferry (ferry ride quality and experience) and the sentiment of San Francisco Bay Ferry as a transit provider. The former question is intended to reflect satisfaction with amenities, ease of use, crew member interactions, comfort, cleanliness, and customer service. The latter question is intended to draw broader information on how riders feel about the service overall, including those factors that may not weigh on their individual trip. The distribution of satisfaction levels among are summarized in **Figures 2-19** and **2-20**, respectively.

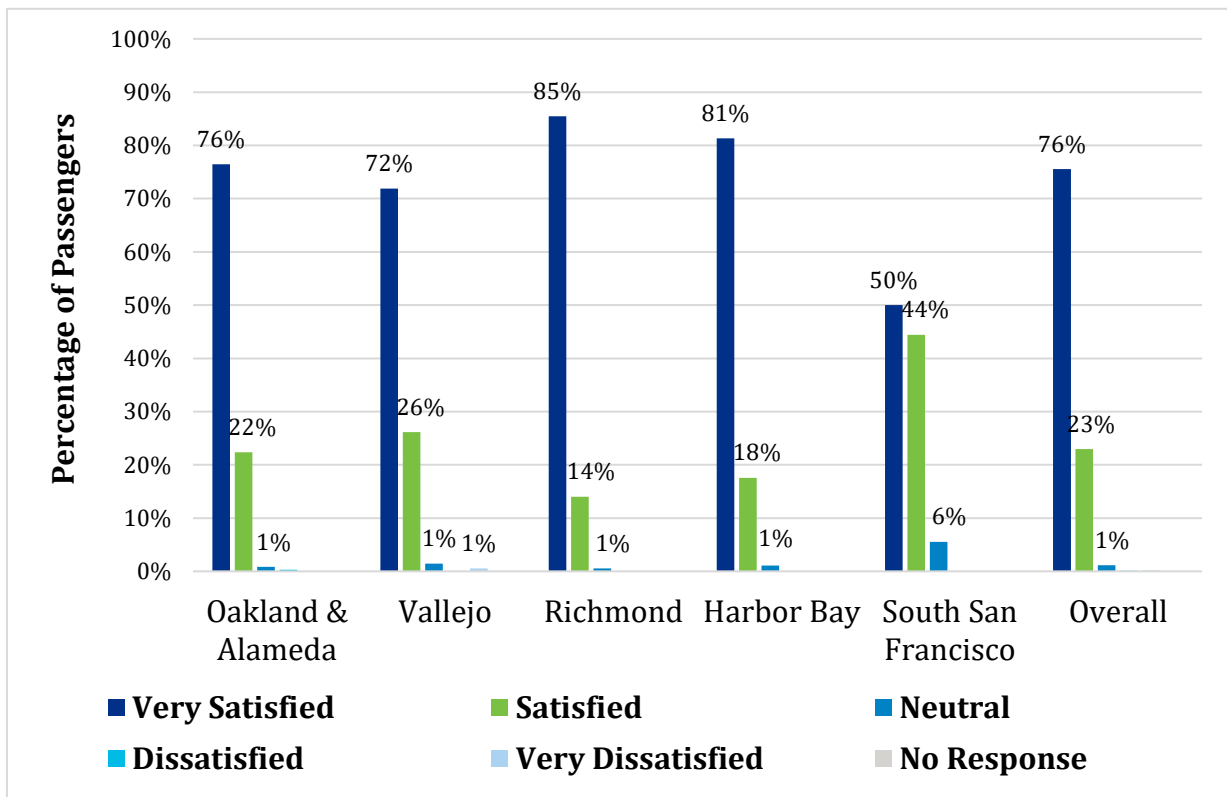


Figure 2-19 Distribution of Overall Ferry Experience Satisfaction Ratings

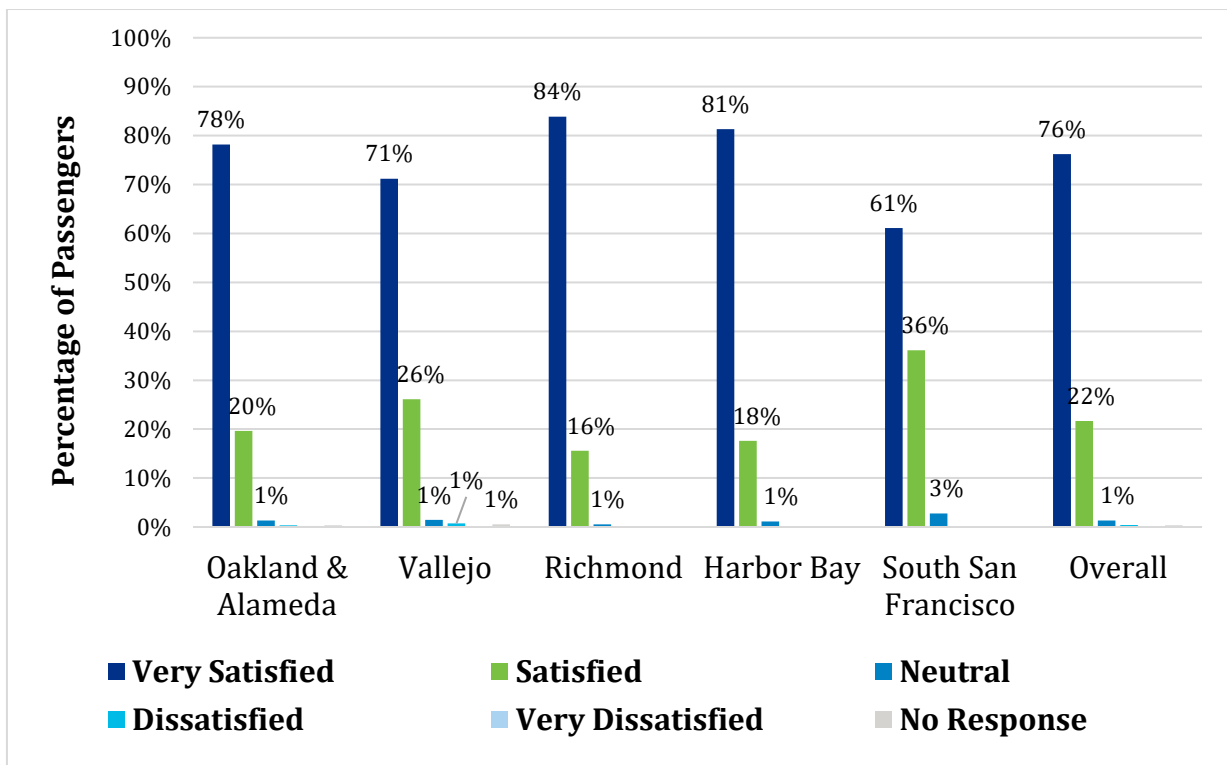


Figure 2-20 Distribution of San Francisco Bay Ferry Satisfaction Ratings

### Key Results

- A total of 99 percent of riders are satisfied with the overall experience of riding the ferry (responding either “very satisfied” or “satisfied”). This value is notably higher when compared to the latest ratio of satisfied riders reported by BART (72 percent)<sup>2</sup>, Caltrain (77 percent)<sup>3</sup>, and Valley Transportation Authority (77 percent)<sup>4</sup> riders. The percentage of satisfied patrons is uniformly high across all routes. The Richmond route has the highest proportion of very satisfied customers (85 percent) the South San Francisco route has the lowest proportion (50 percent).
- A total of 98 percent of riders are satisfied with the San Francisco Bay Ferry overall (“very satisfied” or “satisfied”). The percentage of satisfied patrons is uniformly high across all routes. The Richmond route has the highest proportion of very satisfied customers (84 percent) the South San Francisco route has the lowest proportion (61 percent).

## 2.6 Public Feedback

The most common complements, complaints, and specific suggestions received from ferry riders during the on-board survey are listed below.

### Common Compliments

- Friendly and helpful onboard crews,
- 2021 fare reduction,
- Cleanliness of ferries,
- Bike-first egress policy,
- Commute quality in comparison to other modes, and
- Multiple passengers mentioned that proximity to a ferry terminal was a factor when they relocated.

### Common Complaints

- Additional trips would be beneficial, especially during commuting hours and weeknights,
- Large gaps in service during portions of the schedule,
- Lack of weekend service on weekday only routes,
- Inconsistent Wi-Fi, and

<sup>2</sup> Source: 2020 BART Customer Satisfaction Survey (webpage: [https://www.bart.gov/sites/default/files/docs/CS2020\\_Report\\_Issued032221.pdf](https://www.bart.gov/sites/default/files/docs/CS2020_Report_Issued032221.pdf))

<sup>3</sup> Source: 2019 Caltrain Triennial Customer Survey (webpage: [https://www.caltrain.com/Assets/MarketDevelopment/pdf/2019\\_Caltrain+Triennial+Customer+Survey+Report+\\_v2.pdf](https://www.caltrain.com/Assets/MarketDevelopment/pdf/2019_Caltrain+Triennial+Customer+Survey+Report+_v2.pdf))

<sup>4</sup> Source: VTA On-Board Survey 2017 (webpage: <https://data.vta.org/datasets/7947777e998642c097abf82249604915>)

- Bike-first egress policy.

#### *Specific Suggestions*

- Re-introduce coffee service for morning trips,
- Expand ferry service to new markets and connect existing terminals with direct service, and
- Return to checking tickets during boarding process instead of during egress.

## 2.7 Comparison to Previous Surveys

Results from the 2022 On-Board Passenger Survey were compared to those obtained from the previous surveys conducted in 2021, 2017, 2014 and 2011 for the following factors – demographics (gender, age, annual household income, race/ethnicity, and English proficiency), ferry usage (frequency and reasons of ferry use), trip characteristics (fare type, ticket type, and access modes of terminals), and overall rating of ferry. For tables related to specific terminals, data from the 2019 Richmond Route Survey has been included. The 2021 survey results were heavily affected by the Covid-19 pandemic and associated government health orders with limited ferry service available weekdays only on only three routes and significantly lower ridership. Comparisons to the 2017 and 2019 Richmond survey are more appropriate; 2021 data is provided only for contextual purposes. The Alameda Seaplane route launched in 2021. Data from this survey for Alameda Seaplane is combined with Oakland & Alameda riders to provide comparison and due to data limitations. Survey instruments, methodologies, and sampling plans vary across all surveys.

### 2.7.1 Demographics

A comparison of the distribution of demographics from 2011, 2014, 2017, 2021 and 2022 passenger surveys is provided in **Table 2-1**.

#### *Key Results*

- From 2017 to 2022, there was an uptick of eight percentage points in riders aged between 25-34. This was compensated by slight decreases in older age groups.
- There were some differences in annual household income from 2017 to 2022. In 2017, 25 percent of passengers had an annual household income of \$200,000 or higher; in 2022, that cohort grew to 30 percent. In this same time period, the share of \$50,000-\$99,999 fell four percentage points and \$150,000-\$199,999 fell two percentage points. With some variation, this continues the pattern of ridership trending towards a higher annual household income since 2011.
- There were also notable shifts in race/ethnicity. Sixty-one percent of the respondents in 2017 identified as Caucasian/White; in the 2022 survey that share fell to 48 percent. Other shares remained consistent except for a growth in Asian/Pacific Islander passengers from 15 percent to 23 percent and nine percent of respondents selecting more than one race, which was an option introduced in the 2021 survey.

**Figures 2-21 and 2-22** show comparisons for annual household income and race/ethnicity by route between the past surveys (2017 for Oakland & Alameda and Vallejo routes, 2019 for Richmond route) and the present survey (2022).

### Key Results

- All routes show drops in shares of passengers earning less than \$100,000 per year. The largest drop is on the Richmond route with the share of passengers earning \$50,000-\$99,999 falling from 31 percent in 2019 to 18 percent in 2022. There are slight changes in both directions for the \$100,000-\$200,000 shares, with no single group changing more than seven percentage points. Shares of passengers earning more than \$200,000 have grown across all routes with the South San Francisco route showing the smallest change (40 to 42 percent) and the largest being for the Harbor Bay Route (40 to 55 percent).
- The share of Caucasian/White passengers has decreased across all routes, with the largest decreases seen on the Harbor Bay route (21 percentage points), South San Francisco route (18 percentage points) and Richmond route (17 percentage points). Caucasian/White passengers are now only the majority group on the Oakland and Alameda routes. The share of Asian/Pacific Islander passengers have increased on every route, with the most notable increase being on the Harbor Bay route (37 percent in 2017 to 48 percent in 2022). Hispanic/Latino, African American and Native American shares have only changed by a handful of percentage points between surveys.

**Table 2-1 Historical Comparison of Demographics' Distribution**

Demographic	Option	2022 Survey	2021 Survey	2017 Survey	2014 Survey	2011 Survey
Age	Minor (under 18)	1%	1%	1%	2%	2%
	18-24	7%	7%	5%	4%	6%
	25-34	30%	22%	23%	22%	17%
	35-44	20%	22%	25%	22%	22%
	45-54	21%	19%	22%	21%	22%
	55-64	14%	14%	16%	15%	21%
	65+	8%	6%	8%	10%	10%
	Blank	0%	9%	0%	4%	0%
Annual Household Income	Under \$50,000	7%	18%	6%	11%	17%
	\$50,000 - \$99,999	22%	32%	26%	29%	31%
	\$100,000 - \$149,999	23%	22%	23%	24%	22%
	\$150,000 - \$199,999	18%	13%	20%	17%	13%
	\$200,000 or more	30%	15%	25%	19%	17%
Race/Ethnicity	Caucasian/White	48%	44%	61%	65%	73%
	Asian/Pacific Islander	23%	18%	15%	16%	18%
	Hispanic/Latino	8%	12%	10%	10%	-
	African American/Black	6%	9%	6%	7%	7%
	Native American	0%	1%	1%	1%	2%
	Other	6%	4%	2%	1%	0%

	More than One	9%	11%			
English Proficiency	Very Well	95%	95%	94%	93%	95%
	Well	4%	5%	4%	5%	4%
	Not Well	0%	0%	2%	1%	1%
	Not at all	0%	0%	0%	1%	0%

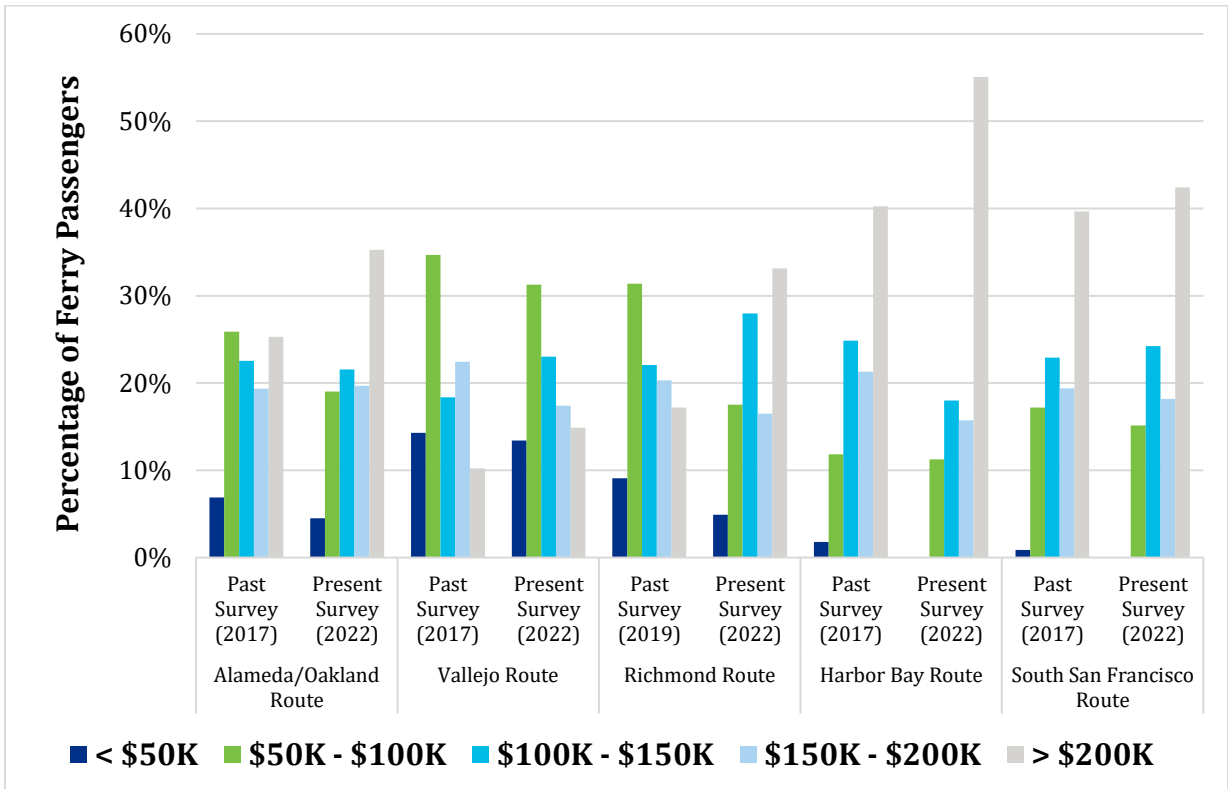


Figure 2-21 Comparison of Annual Household Income by Route between Past Surveys (2017/2019) and Present Survey (2022)

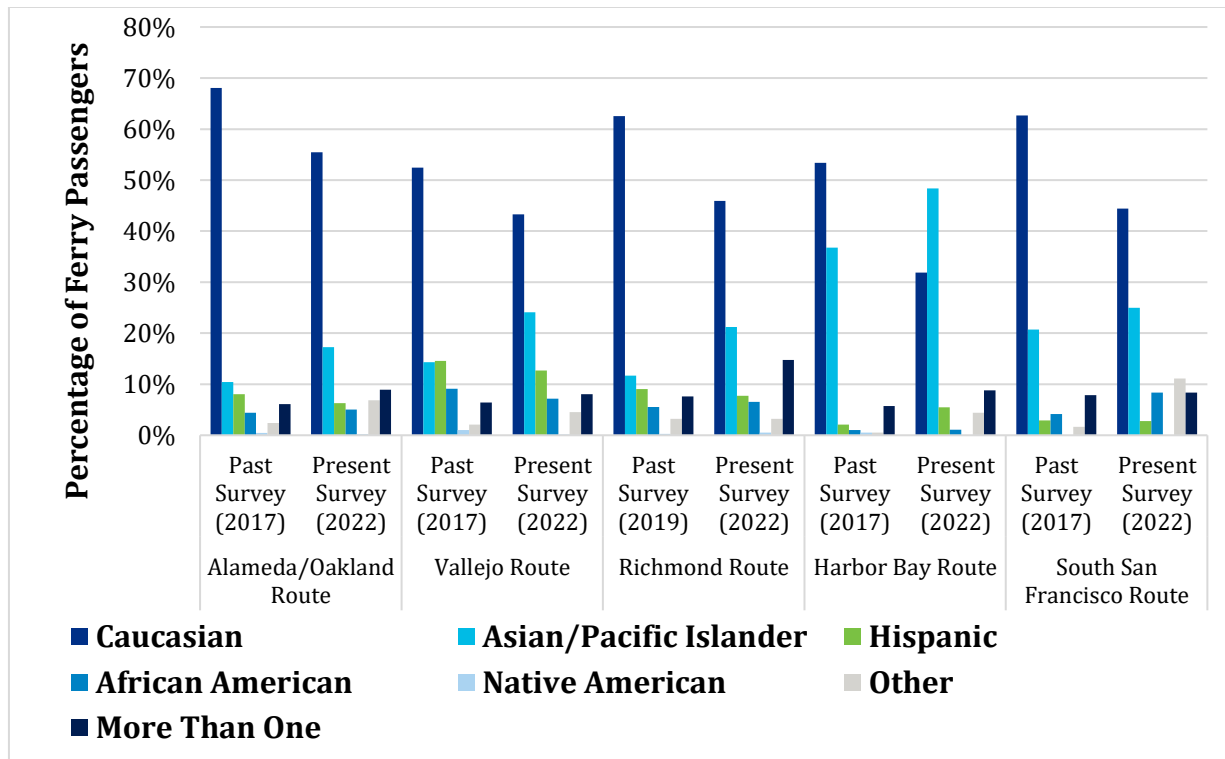


Figure 2-22 Comparison of Race/Ethnicity by Route between Past Surveys (2017/2019) and Present Survey (2022)

## 2.7.2 Ferry Usage

The historical distributions of ferry usage metrics – frequency and reasons of ferry use – are provided in **Tables 2-2**.

### Key Results

- The share of weekday patrons riding the ferry five days per week has been consistently dropping (62 percent in 2011, 58 percent in 2014, and 49 percent in 2017, 26 percent in 2022). The large drop from 2017 to 2022 has been magnified by the effects of the Covid-19 pandemic.
- The share of weekday passengers that ride the ferry 3-4 days per week rose eight percentage points from 2017 to 2022. The share of weekday passengers that ride the ferry 1-2 days per week rose 13 percentage points in the same time frame.
- For weekday and weekend riders, the top three reasons listed for riding the ferry were to avoid traffic/parking, the quality of the ride, and the relaxing nature of the ride. This has held consistent from 2017 to 2022 for both weekday and weekend riders.
- The following reasons for ferry use also increased or decreased by greater than ten percentage points compared to the 2017 survey:
  - Cheaper (Weekday: 11 percentage point increase from 2017; Weekend: 13 percentage point increase from 2017)

- Multitasking (Weekend: 13 percentage point decrease from 2017)

**Figure 2-23** shows comparisons for frequency of ferry use by route between the past surveys (2017 for Oakland, Alameda, and Vallejo routes, 2019 for Richmond route) and the present survey (2022).

#### *Key Results*

- The trends of ridership frequency by route largely mirror the overall trends described above. The following cases stand out:
  - All routes but the Richmond route had 20+ percentage point drops in 5 day per week riders (Richmond went from 25 percent to 20 percent from 2019 to 2022).
  - The South San Francisco route's share of 3-4 day per week riders rose from 32 percent to 53 percent from 2017 to 2022.
  - The Richmond route, Harbor Bay route and South San Francisco route all saw their shares of 1-2 days per week riders increase by 14 to 22 percentage points.
  - The Alameda/Oakland routes and the Vallejo route had increases in the share of customers that ride less than one day per month.

**Table 2-2 Historical Distribution of Ferry Usage**

Ferry Usage Metric	Option	2022 Survey		2021 Survey		2017 Survey		2014 Survey		2011 Survey	
		Weekday	Weekend	Weekday	Weekend	Weekday	Weekend	Weekday	Weekend	Weekday	Weekend
Frequency of Ferry Use	6-7 days/week	2%	2%	1%	N/A	3%	3%	2%	1%	3%	1%
	5 days/week	26%	1%	34%	N/A	49%	14%	58%	1%	62%	0%
	3-4 days/week	32%	3%	20%	N/A	24%	12%	17%	2%	19%	1%
	1-2 days/week	21%	7%	13%	N/A	8%	5%	9%	2%	6%	3%
	1-3 days/month	7%	22%	9%	N/A	7%	17%	4%	13%	3%	17%
	< 1 day/month	9%	47%	13%	N/A	5%	30%	4%	45%	3%	49%
	First time	3%	19%	5%	N/A	4%	18%	4%	34%	4%	29%
	No Response	0%	0%	4%	N/A	1%	2%	0%	0%	0%	0%
Reasons for Ferry Use <sup>1</sup>	No Car	8%	13%	15%	N/A	5%	9%	8%	9%	N/A	N/A
	Avoid Traffic/Parking	69%	45%	65%	N/A	70%	53%	66%	39%	N/A	N/A
	Multitasking	28%	8%	42%	N/A	35%	21%	36%	10%	N/A	N/A
	Faster	26%	12%	29%	N/A	32%	20%	24%	12%	N/A	N/A
	Environment-Friendly	14%	12%	32%	N/A	16%	13%	17%	11%	N/A	N/A
	Cheaper	18%	17%	18%	N/A	7%	5%	8%	9%	N/A	N/A
	Relaxing	42%	48%	62%	N/A	50%	51%	49%	42%	N/A	N/A
	Sightseeing	5%	29%	19%	N/A	7%	27%	7%	49%	N/A	N/A
	Ride Quality	59%	39%	60%	N/A	56%	41%	56%	24%	N/A	N/A
Other	3%	2%	8%	N/A	5%	5%	0%	1%	N/A	N/A	

Note:

<sup>1</sup>This includes multiple selections by passengers; as such, totals will be more than 100 percent.

N/A – Not applicable

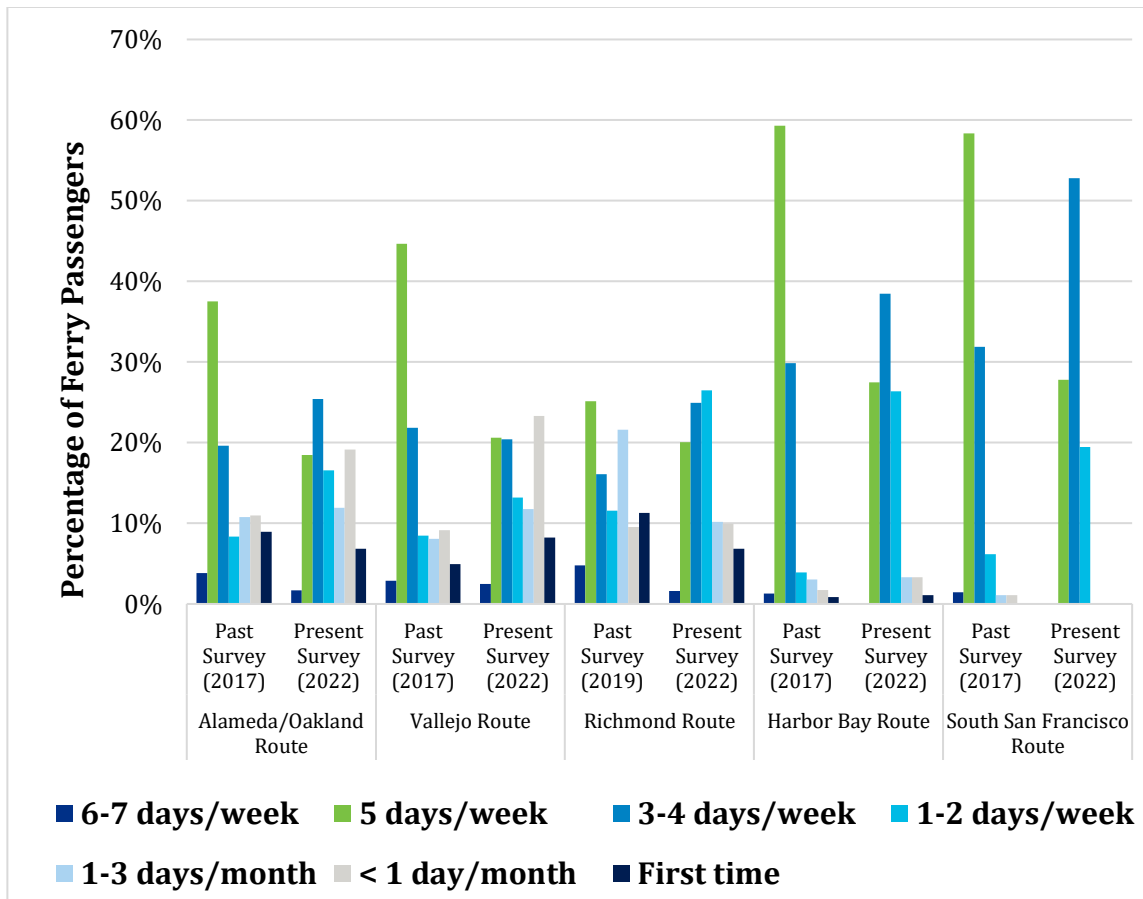


Figure 2-23 Comparison of Frequency of Ferry Use by Route between Past Surveys (2017/2019) and Present Survey (2022)

### 2.7.3 Fare and Ticket Types

The historical distribution of fare and ticket type used by passengers is provided in **Table 2-3**.

**Table 2-3 Historical Distribution of Fare and Ticket Types**

Fare Type/ Ticket Type	Option	2022 Survey		2021 Survey		2017 Survey		2014 Survey		2011 Survey	
		Weekday	Weekend	Weekday	Weekend	Weekday	Weekend	Weekday	Weekend	Weekday	Weekend
Fare Type	Adult	94%	83%	85%	N/A	91%	81%	92%	75%	95%	74%
	Youth	0%	3%	2%	N/A	1%	9%	0%	1%	0%	5%
	Senior	5%	11%	7%	N/A	6%	14%	5%	1%	5%	17%
	Disabled/Medicare	1%	1%	4%	N/A	1%	3%	0%	7%	0%	0%
	Group	0%	0%	-	N/A	0%	0%	0%	1%	0%	0%
	Military	0%	0%	-	N/A	0%	0%	0%	2%	0%	2%
	Other	0%	1%	1%	N/A	1%	1%	1%	1%	0%	1%
	Blank/No Response	0%	0%	2%	N/A	1%	1%	1%	12%	0%	0%
Ticket Type	Clipper Card <sup>1</sup>	86%	62%	77%	N/A	77%	57%	51%	21%	-	-
	Mobile Ticket <sup>3</sup>	9%	24%	9%	N/A						
	Single Ride/One-Way/Paper Ticket	5%	14%	6%	N/A	9%	33%	6%	32%	5%	35%
	Multi-Ticket Booklet/Punch Card <sup>2</sup>	N/A	N/A		N/A	-	-	17%	4%	56%	9%
	Day-Pass/Roundtrip <sup>2</sup>	N/A	N/A	0%	N/A	-	-	3%	33%	5%	56%
	Monthly Pass	N/A	N/A	6%	N/A	13%	0%	21%	1%	34%	0%
	Other	N/A	N/A		N/A	1%	8%	1%	8%	0%	0%
	Blank/No Response	0%	0%	2%	N/A	0%	2%	1%	1%	0%	0%

**Note:**<sup>1</sup>Not in use at the time of the 2011 Survey.<sup>2</sup>Not in use at the time of the 2017 Survey.<sup>3</sup>Not in use at the time of the 2011, 2014, and 2017 Surveys.

### *Key Results*

- The historical distribution of fare types for all passenger surveys did not have significant changes.
  - The “adult” fare type is most predominantly used in 2022 for both weekdays and weekends.
  - As youth are likely undercounted by this survey, youth fares are also undercounted.
- Since the 2014 Survey, the use of Clipper Card has increased from 51 percent to 86 during weekdays and 21 percent to 62 percent on weekends. This share increased for weekdays and weekends from 2017 to 2022.
- Paper tickets decreased from nine percent to five percent on weekdays and 33 percent to 14 percent on weekends from 2017 to 2022.

### **2.7.4 Access Modes to Terminals**

The historical distribution of access modes to ferry terminals is provided in **Tables 2-4 and 2-5**.

**Table 2-4 Historical Distribution of Access Modes to Terminals – East Bay and North Bay**

Access Mode					2021 Survey				2019 Survey	2017 Survey				2014 Survey				2011 Survey			
	Harbor Bay	Richmond	Vallejo	Oakland & Alameda	Richmond	Vallejo	Alameda	Oakland	Richmond	Harbor Bay	Vallejo	Alameda	Oakland	Harbor Bay	Vallejo	Alameda	Oakland	Harbor Bay	Vallejo	Alameda	Oakland
Drive Alone	45%	57%	43%	45%	55%	46%	57%	29%	45%	36%	63%	58%	45%	62%	86%	75%	52%	61%	67%	62%	51%
Kiss-and-Ride/ Carpool	7%	17%	36%	18%	16%	26%	17%	10%	29%	23%	22%	15%	9%	6%	7%	13%	3%	8%	16%	20%	14%
Transit/ Employer Shuttle <sup>1</sup>	1%	1%	2%	2%	0%	1%	0%	0%	3%	4%	4%	0%	6%	2%	3%	0%	1%	2%	2%	1%	3%
Walk Only	19%	5%	4%	12%	8%	7%	4%	38%	14%	21%	4%	5%	18%	24%	4%	8%	26%	18%	4%	3%	11%
Bike	14%	11%	4%	17%	16%	5%	15%	19%	16%	12%	2%	17%	15%	6%	0%	4%	18%	8%	1%	9%	15%
Taxi	N/A	N/A	N/A	N/A	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
TNC	0%	1%	4%	1%	0%	7%	0%	5%	4%	1%	3%	3%	6%	0%	0%	0%	0%	0%	0%	0%	0%
Other	13%	7%	8%	5%	5%	8%	6%	0%	2%	3%	1%	2%	1%	0%	0%	0%	0%	3%	10%	5%	6%

Note:

<sup>1</sup>In 2022 Survey, "Employer Shuttle" is part of "Other" access mode. The percentage shown is for Public Transit only.

**Table 2-5 Historical Distribution of Access Modes to Terminals – San Francisco and South San Francisco**

Access Mode	2022 Survey		2021 Survey	2019 Survey	2017 Survey			2014 Survey		2011 Survey
	Ferry Building	South San Francisco	Ferry Building	Ferry Building	Ferry Building	Pier 41	South San Francisco	Ferry Building	South San Francisco	Ferry Building
Drive Alone	5%	0%	3%	10%	0%	0%	0%	0%	0%	3%
Kiss-and-Ride/ Carpool	10%	8%	2%	4%	7%	8%	7%	2%	1%	0%
Transit/ Employer Shuttle <sup>1</sup>	23%	0%	19%	26%	19%	21%	24%	17%	18%	12%
Walk Only	30%	31%	45%	53%	56%	32%	38%	75%	45%	75%
Bike	19%	46%	16%	7%	12%	31%	26%	5%	33%	7%
Taxi	N/A	N/A	1%	0%	0%	0%	0%	0%	0%	0%
TNC	6%	0%	2%	0%	5%	5%	3%	1%	3%	1%
Other	8%	15%	12%	0%	1%	3%	2%	0%	0%	2%

Note:

<sup>1</sup>In 2022 Survey, "Employer Shuttle" is part of "Other" access mode. The percentage shown is for Public Transit only.

### Key Results

- Vallejo recorded a reduced share of passengers accessing the terminal by driving alone, dropping from 63 percent to 43 percent from 2017 to 2022.
- Oakland and Alameda experienced decreases in passengers driving alone to the terminals with increases in carpool/kiss-and-ride passengers.
- The share of Richmond riders that selected “drive alone” rose from 45 percent in 2019 to 57 percent in 2021. There was a 12-percentage point drop in the “Kiss-and-Ride/Carpool” share and a nine-percentage point drop in the “Walk Only” share.
- Harbor Bay saw a nine-percentage point increase in the “Drive Alone” share from 2017 to 2022, with a 16-percentage point drop in the “Kiss-and-Ride/Carpool” share. The largest increase is a ten-percentage point rise in “Other,” which in the 2022 survey includes employer shuttles as well as scooters.
- At the San Francisco Ferry Building, the most common access modes continue to be walking, biking, and transit. These three modes combined to account for 72 percent of all options, a decrease from 87 percent in 2017. The largest increase outside of these modes is Other from one percent to eight percent, which includes scooters.
- South San Francisco had a significant increase in cycling access rising from 26 percent to 46 percent from 2017 to 2022. It also had a total drop in Transit/Employer Shuttle from 24 percent to 0 percent; this is because employer shuttles were transferred to “Other” in the 2022 survey, which had a 15 percent share.

### 2.7.5 Overall Ferry Satisfaction

The historical distribution of systemwide ferry satisfaction ratings is provided in **Table 2-6**. The satisfaction ratings in this survey (2022) are based on the overall experience of riding the ferry.

**Table 2-6 Historical Distribution of Overall Ferry Satisfaction Ratings**

Satisfaction Level	Rating	2022 Survey	2021 Survey	2017 Survey	2014 Survey	2011 Survey
Satisfied	Very Satisfied	76%	48%	38%	39%	58%
	Somewhat Satisfied	23%	26%	50%	52%	34%
Neutral	Neutral	1%	16%	10%	8%	6%
Dissatisfied	Somewhat Dissatisfied	0%	7%	2%	1%	2%
	Dissatisfied	0%	3%	0%	0%	0%

The overall ferry satisfaction ratings obtained from the 2022 survey are noteworthy when compared to previous passenger surveys – 99 percent of patrons were considered satisfied with the majority of which having selected ‘Very Satisfied’. In 2017, 88 percent of patrons were satisfied, with more having selected ‘Somewhat Satisfied’. For the 2022 survey, ‘Somewhat Satisfied’ was changed to ‘Satisfied’.

## Section 3

### Conclusions

Major conclusions from the 2022 On-Board Passenger Survey conducted for the San Francisco Bay Ferry are as follows:

- **Satisfaction**
  - High Rider Satisfaction – Overall passenger satisfaction was the highest it has been compared to all past iterations of the On-Board Passenger Survey.
  - Areas for Improvement – Through their comments, passengers have indicated a desire for increased frequencies and weekend service on routes that do not have it.
- **Demographic Profile**
  - Working-age Commuters – The majority of ferry riders are between 25 to 54 years old and use the ferry to get to and from work.
  - Higher Income – Ferry riders, especially commuters, typically have higher annual household incomes than the average household in the municipalities where ferry terminals are located.
  - Racial and Ethnic Representation – The percentage of non-white passengers rose to above 50 percent for the first time since this survey began in 2011.
- **Use Characteristics**
  - Emerging Travel Frequencies – The share of riders using the ferry five days/week has fallen significantly, while the share of riders that are using the ferry between one and four days/week has risen in response. This change is likely a product of shifting work patterns brought on by the COVID-19 pandemic, with a greater share of office-based employees working remotely more frequently than before.
  - Alternate Modes – Most riders choose the ferry for their trip rather than BART or driving alone. A notable share of riders reported that the ferry is their only option.
  - Primary Reasons for Use – The most common reasons for ferry use are avoidance of traffic/parking, the relaxing nature of the ride and the ride quality compared to other modes. This has been consistent feedback since the question was first asked in 2014.
  - Effect of reduced fares - The share of riders citing cheaper costs increased significantly in 2022, reflecting the lower fares that were established in 2021.

■ **Terminal Access**

- **Driving Alone** – Driving alone has the highest share among passengers among the modes passengers use to access their origin terminal. Richmond and Harbor Bay had increases in this share from previous surveys while Vallejo had a significant drop.
- **Cycling and Scooters are Popular** – The cycling share at destination terminals continues to grow as compared to previous surveys. In addition, based on an analysis of write-in answers to terminal access questions, the use of electric scooters is an emerging access mode for ferry riders.
- **“Last Mile” Shift** – The proportion of riders walking to their destination terminal (San Francisco and South San Francisco) is decreasing while the shares of riders using bikes, scooters and public transit are increasing. This shift is likely related to rider demand for access to destinations that are farther away from the San Francisco Ferry Building.

# Appendix A

## Sampling Plan

Highlighted trips were surveyed

### Weekdays

#### **Alameda/ Oakland – San Francisco Route**

Westbound			Eastbound		
Dep Ala	Dep Oak	Arr SF	Dep SF	Arr Oak	Arr Ala
---	6:30 AM	6:55 AM	7:05 AM	7:30 AM	---
---	7:35 AM	8:00 AM	7:30 AM	7:55 AM	---
---	8:00 AM	8:25 AM	8:10 AM	8:35 AM	---
---	8:40 AM	9:05 AM	8:35 AM	9:00 AM	---
---	9:05 AM	9:30 AM	9:25 AM	10:00 AM	9:45 AM
9:50 AM	10:10 AM	10:35 AM	10:15 AM	---	10:35 AM
10:40 AM	---	11:00 AM	10:25 AM	10:50 AM	
---	11:00 AM	11:25 AM	11:20 AM	11:55 AM	11:40 AM
11:45 AM	12:05 PM	12:30 PM	1:10 PM	1:35 PM	1:50 PM
12:20 PM	12:35 PM	1:00 PM	2:05 PM	2:30 PM	2:45 PM
1:55 PM	1:40 PM	2:15 PM	2:25 PM	2:50 PM	3:10 PM
2:50 PM	2:35 PM	3:10 PM	3:25 PM	3:40 PM	4:00 PM
3:15 PM	3:00 PM	3:35 PM	4:25 PM	4:50 PM	---
4:05 PM	3:50 PM	4:25 PM	5:25 PM	5:50 PM	6:05 PM
---	4:55 PM	5:20 PM	6:25 PM	6:50 PM	7:05 PM
6:10 PM	5:55 PM	6:30 PM	7:35 PM	8:00 PM	8:15 PM
7:10 PM	6:55 PM	7:30 PM	8:00 PM	8:25 PM	8:40 PM
8:45 PM	8:30 PM	9:05 PM	9:10 PM	9:35 PM	9:50 PM
9:55 PM	9:40 PM	10:15 PM	---	---	---

**Alameda Seaplane – San Francisco Route**

Westbound		Eastbound	
Dep Ala S	Arr SF	Dep SF	Arr Ala S
6:30 AM	6:50 AM	6:55 AM	7:15 AM
7:00 AM	7:20 AM	7:50 AM	8:10 AM
7:25 AM	7:45 AM	8:45 AM	9:05 AM
8:20 AM	8:40 AM	9:40 AM	10:00 AM
9:15 AM	9:35 AM	10:05 AM	10:25 AM
10:10 AM	10:30 AM	10:55 AM	11:15 AM
10:30 AM	10:50 AM	11:50 AM	12:10 PM
4:00 PM	4:20 PM	3:30 PM	3:50 PM
5:00 PM	5:20 PM	4:30 PM	4:50 PM
6:00 PM	6:20 PM	5:30 PM	5:50 PM
6:50 PM	7:10 PM	6:25 PM	6:45 PM
8:25 PM	8:45 PM	7:00 PM	7:20 PM
---	---	8:25 PM	8:45 PM
---	---	10:20 PM	10:40 PM

**Harbor Bay – San Francisco Route**

Westbound		Eastbound	
Dep Har Bay	Arr SF	Dep SF	Arr Har Bay
6:30 AM	6:55 AM	7:00 AM	7:25 AM
7:30 AM	7:55 AM	8:00 AM	8:25 AM
8:30 AM	8:55 AM	9:00 AM	9:25 AM
9:00 AM	9:25 AM	10:45 AM	11:10 AM
9:30 AM	9:55 AM	11:30 AM	11:55 AM
10:20 AM	10:45 AM	1:25 PM	1:50 PM
11:15 AM	11:40 AM	3:40 PM	4:05 PM
12:00 PM	12:25 PM	4:40 PM	5:05 PM
4:10 PM	4:35 PM	5:40 PM	6:05 PM
5:10 PM	5:35 PM	6:40 PM	7:05 PM
6:10 PM	6:35 PM	---	---
7:55 PM	8:20 PM	---	---

**Richmond – San Francisco Route**

Southbound		Northbound	
Dep Richmond	Arr SF	Dep SF	Arr Richmond
6:30 AM	7:05 AM	7:15 AM	7:50 AM
7:00 AM	7:35 AM	7:45 AM	8:20 AM
8:00 AM	8:35 AM	9:55 AM	10:30 AM
9:00 AM	9:35 AM	10:25 AM	11:00 AM
10:40 AM	11:15 AM	3:00 PM	3:35 PM
11:10 AM	11:45 AM	4:00 PM	4:35 PM
3:40 PM	4:15 PM	4:25 PM	5:00 PM
4:45 PM	5:20 PM	5:30 PM	6:05 PM
5:05 PM	5:40 PM	6:00 PM	6:35 PM
6:15 PM	6:50 PM	7:00 PM	7:35 PM
7:25 PM	8:00 PM	8:00 PM	8:35 PM
8:25 PM	9:00 PM	---	---

**South San Francisco – Oakland/Alameda Route**

Westbound			Eastbound		
Dep Ala	Dep Oak	Arr So SF	Dep So SF	Arr Oak	Arr Ala
6:05 AM	6:20 AM	7:00 AM	7:10 AM	8:10 AM	7:50 AM
7:05 AM	7:20 AM	8:00 AM	3:20 PM	4:00 PM	4:20 PM
8:00 AM	8:20 AM	9:00 AM	4:20 PM	5:00 PM	5:20 PM
4:25 PM	4:10 PM	5:05 PM	5:20 PM	6:00 PM	6:20 PM

**Vallejo – San Francisco Route**

Southbound		Northbound	
Dep Vallejo	Arr SF	Dep SF	Arr Vallejo
5:30 AM	6:30 AM	6:35 AM	7:35 AM
6:00 AM	7:00 AM	7:05 AM	8:05 AM
7:15 AM	8:15 AM	8:20 AM	9:20 AM
7:45 AM	8:45 AM	9:50 AM	10:50 AM
8:15 AM	9:15 AM	11:00 AM	12:00 PM
9:30 AM	10:30 AM	11:30 AM	12:30 PM
11:00 AM	12:00 PM	12:10 PM	1:10 PM
1:00 PM	2:00 PM	2:20 PM	3:20 PM
2:00 PM	3:00 PM	3:35 PM	4:35 PM
3:30 PM	4:30 PM	4:35 PM	5:35 PM
4:45 PM	5:45 PM	5:20 PM	6:20 PM
6:40 PM	7:40 PM	6:00 PM	7:00 PM
---	---	8:00 PM	9:00 PM

Weekends**Alameda/Oakland – San Francisco Route**

Westbound			Eastbound		
Dep Ala	Dep Oak	Arr SF	Dep SF	Arr Oak	Arr Ala
8:30 AM	8:50 AM	9:15 AM	9:20 AM	9:40 AM	9:55 AM
9:45 AM	10:05 AM	10:30 AM	10:35 AM	10:55 AM	11:10 AM
---	10:45 AM	11:10 AM	11:30 AM	11:50 AM	12:10 PM
11:00 AM	11:20 AM	11:45 AM	12:50 PM	1:10 PM	1:25 PM
12:00 PM	12:20 PM	12:45 PM	1:50 PM	2:10 PM	2:25 PM
1:15 PM	1:35 PM	2:00 PM	2:30 PM	2:50 PM	3:05 PM
2:15 PM	2:35 PM	3:00 PM	3:30 PM	3:50 PM	4:05 PM
2:55 PM	3:15 PM	3:40 PM	4:30 PM	4:50 PM	5:05 PM
3:55 PM	4:15 PM	4:40 PM	5:00 PM	5:20 PM	5:35 PM
4:55 PM	5:15 PM	5:40 PM	5:50 PM	6:10 PM	6:25 PM
6:15 PM	6:35 PM	7:00 PM	7:10 PM	7:30 PM	7:45 PM
7:35 PM	7:55 PM	8:20 PM	8:30 PM	8:50 PM	9:05 PM
8:55 PM	9:10 PM	9:35 PM	9:40 PM	10:00 PM	10:15 PM

**Richmond – San Francisco Route**

Southbound		Northbound	
Dep Richmond	Arr SF	Dep SF	Arr Richmond
9:50 AM	10:25 AM	11:15 AM	11:50 AM
12:00 PM	12:35 PM	2:05 PM	2:40 PM
5:15 PM	5:50 PM	4:30 PM	5:05 PM
6:45 PM	7:20 PM	6:00 PM	6:35 PM
---	---	8:10 PM	8:45 PM

**Vallejo – San Francisco Route**

Southbound		Northbound	
Dep Vallejo	Arr SF	Dep SF	Arr Vallejo
9:20 AM	10:20 AM	10:30 AM	11:30 AM
10:20 AM	11:20 AM	11:30 AM	12:30 PM
11:40 AM	12:40 PM	1:50 PM	2:50 PM
12:40 PM	1:40 PM	2:50 PM	3:50 PM
3:00 PM	4:00 PM	4:10 PM	5:10 PM
3:45 PM	4:45 PM	5:10 PM	6:10 PM
4:00 PM	5:00 PM	6:30 PM	7:30 PM
7:40 PM	8:40 PM	8:50 PM	9:50 PM

## Appendix B

### Survey Questionnaire

# On-Board Passenger Survey 2022

## About this trip

### 1) Where did you board your ferry?

- Alameda Main Street
- Alameda Seaplane
- Harbor Bay
- Oakland
- Richmond
- San Francisco
- South San Francisco
- Vallejo

### 2) Where will you exit your ferry?

- Alameda Main Street
- Alameda Seaplane
- Harbor Bay
- Oakland
- Richmond
- San Francisco
- South San Francisco
- Vallejo

**3) Where did your trip start before you arrived at the ferry terminal?**

- My home
- My work
- Somewhere else

**4) Please enter your approximate start location**

Street Address: \_\_\_\_\_

Apt/Suite/Office: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_

Zip: \_\_\_\_\_

**5) Where will you go after exiting this ferry?**

- My home
- My work
- Somewhere else

**6) Please enter your approximate end location**

Street Address: \_\_\_\_\_

Apt/Suite/Office: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_

Zip: \_\_\_\_\_

**7) How did you get to the ferry terminal?**

- Walk all the way
- Bike

- Drive alone
- Carpool
- Dropped off/Picked up by car
- Public transit (Bus/Rail)
- Private/Employer shuttle
- Taxi
- Uber/Lyft
- Other - Write In: \_\_\_\_\_

**8) How will you get to your final destination after you exit the ferry?**

- Walk all the way
- Bike
- Drive alone
- Carpool
- Dropped off/Picked up by car
- Public transit (Bus/Rail)
- Private/Employer shuttle
- Taxi
- Uber/Lyft
- Other - Write In: \_\_\_\_\_

**9) What is the purpose of your trip today?**

- Commute to/from work/school
- Medical/Dental
- Shopping
- Entertainment/Recreation
- Sightseeing
- Other - Write In: \_\_\_\_\_

**10) What OTHER TYPE of transportation would you most likely have used if you didn't take the Ferry for your trip today?**

- Ferry is my only option
- Drive alone
- BART / train transit
- Bus
- Carpool
- "Casual" carpool
- Uber/Lyft
- Other - Write In: \_\_\_\_\_

**11) What OTHER TRANSIT SYSTEMS do you use in addition to San Francisco Bay Ferry (not just for this particular trip)?**

- AC Transit
- BART
- Caltrain
- Golden Gate Ferry and Bus
- MUNI
- Samtrans
- SolTrans
- Vine Transit
- Other - Write In: \_\_\_\_\_

**12) What type of fare did you pay for this trip?**

- Adult
- Disabled/Medicare
- Youth
- School groups
- Senior
- Other - Write In: \_\_\_\_\_

**13) What type of ticket did you use?**

- Clipper card/app
- Single ride/one-way paper ticket
- Passage mobile ticket

**14) Are you making a round-trip on the ferry today?**

- Yes (rode ferry earlier today or will ride later today)
- No

**15) How often do you typically use the ferry?**

- 6-7 days a week
- 5 days a week
- 3-4 days a week
- 1-2 days a week
- 1-3 days a month
- Less than once per month
- This is my first time on the ferry

**16) What are the main reasons you ride the ferry (select up to three)**

- Don't have a car/don't drive
- Don't want to deal with parking/traffic
- Ability to do other things (read, sleep)
- Faster than other options
- Help the environment
- Save money
- Relax/reduce stress
- Sightseeing

Quality of ride much better than BART/bus

Other - Write In: \_\_\_\_\_

**17) Did you ride the ferry prior to March 2020 (COVID shelter-in-place)?**

Yes

No

**18) Do you live here or are you a visitor?**

Live in San Francisco Bay area

Visitor

**19) Please rate the overall experience of riding the ferry, from the best rating (Very satisfied) to the worst rating (Very Dissatisfied)**

Very Satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very Dissatisfied
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**20) Please rate your sentiment of San Francisco Bay Ferry overall, from the best rating (Very satisfied) to the worst rating (Very Dissatisfied)**

Very Satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very Dissatisfied
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**21) Age**

12 or younger

13 - 17

- 18 - 24
- 25 - 34
- 35 - 44
- 45 - 54
- 55 - 64
- 65 & older

**22) Annual household income**

- Under \$15,000
- \$15,000 - \$24,999
- \$25,000 - \$49,999
- \$50,000 - \$74,999
- \$75,000 - \$99,999
- \$100,000 - \$149,999
- \$150,000 - \$199,999
- \$200,000 or more

**23) Including yourself, how many people live in your household?**

- 1 (just you)
- 2
- 3
- 4
- 5
- 6+

**24) Race/Ethnicity (*Please mark all that apply*)**

- Caucasian/White
- Hispanic/Latino
- African American/Black
- Asian/Pacific islander

Native American

Other - Write In: \_\_\_\_\_

**25) What is your home zip code**

\_\_\_\_\_

**26) How well do you speak English?**

Very well

Well

Not well

Not at all

**27) Language(s) spoken at home (other than English)**

Mandarin

Cantonese

Spanish

Other - Write In: \_\_\_\_\_

**28) Would you be interested in participating in a rider focus group?**

Yes

No

**29) Contact information**

Name: \_\_\_\_\_

Email Address: \_\_\_\_\_

**30) Additional comments**

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Thank You!