

Ferry Service Planning Updates



TREASURE ISLAND
MOBILITY MANAGEMENT AGENCY

Agenda Item #4
November 9, 2021

Agenda

1. Ferry Service Plan
2. Peer Ferry Service Overview
3. Fare Analysis
4. Electric Infrastructure Planning
5. Next Steps

Planned Ferry Service

**Electric ferry service planned for mid 2024
with the start of tolling**

- 100 Passenger Vessels assumed for Initial Service
 - Serves as near term SFOBB bike link to SF
- Service expansion as island population grows

**Interim ferry service planned for early 2022 by
Developer**



Projected Ferry Demand

Average Daily Ridership

Model Year	Daily Trips	Direction	6-9 AM	9-3 Mid Day	3-7 PM
2025	797	WB	344	-	109
		EB	42	-	302
2035	3,320	WB	1,013	529	280
		EB	121	492	885
2040	4,390	WB	1,340	700	370
		EB	160	650	1,170

Updated Ferry Demand

1. Increased Ferry Demand

- Recreational Demand
- Seasonal Demand

2. Proposed Service Plan

- Frequency
- Vessel Size



Updated Ferry Demand



RECREATONAL DEMAND

- **2025**
 - Weekday trip additions is 1%
 - Weekend trip additions is 3%
- **2030**
 - Weekday trip additions is 3%
 - Weekend trip additions: 9%
- **2035**
 - Weekday trip additions: 6%
 - Weekend trip additions: 18%
- **2040**
 - Weekday trip additions: 6%
 - Weekend trip additions: 18%

SEASONAL DEMAND

- **Weekday**
 - Summer: 4.5% + increase
 - Winter: 4.1% - decrease
- **Weekend**
 - Summer: 37.8% + increase
 - Winter: 42.6% - decrease

Updated Ferry Demand

Frequency and Vessel Size Projections

Model Year	Service Frequency	Vessel Size	Number of Vessel(s)
2025	30-40 min	99 pax	1
2035	15 min	149 pax	2
2040	15 min	248 pax	2

Treasure Island Ferry Service

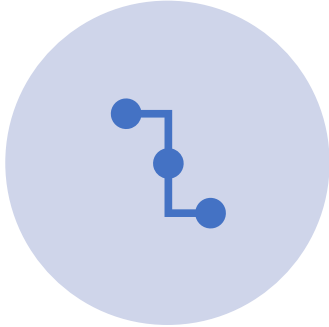
Service Alternatives Considered

Model Year	Frequency	Time of the Day	Vessel Size	Vessel Type
2025	30-40 min	Weekday - Peak Only	99 pax	Diesel
		Weekday & Weekend		
	TBD	Weekday - Peak Only	99 pax	Electric
		Weekday & Weekend		
		Weekday & Weekend	Interlining	Diesel
2035	15 min	Weekday & Weekend	149 pax	Electric
2040	15 min	Weekday & Weekend	248 pax	Electric

Peer Ferry Service Overview

1. **Bay Area** - Golden Gate Ferry, WETA and Prop SF
2. **National** - North Carolina, Kitsap Transit, NYC Ferry, Staten Island Ferry
3. **International** - Transport Sydney Ferries

Peer Ferry Service - Takeaways



INTERLINING FERRY
SERVICES WITH
MULTIPLE SHORT-RUN
DESTINATIONS



MULTIPLE FERRY TYPES
PROVIDE A MORE ROBUST
SERVICE PLAN



SERVICE TO CONNECTED
INTEGRATED MULTI-
MODAL TRANSIT
NETWORKS

1. Mode based fare comparison

- Oakland / San Francisco - Bus and Ferry
- Sausalito / San Francisco - Bus and Ferry

2. Farebox recovery ratio analysis

- Bay Area - WETA and GGT
- National - New York and Washington

Ferry Fare Analysis



Mode Based Fare Comparison – Bus & Ferry

Origin / Destination	Ferry		Bus		Ferry/Bus Fare % Differences	
	Clipper	Cash	Clipper	Cash	Clipper	Cash
Sausalito/San Francisco (Golden Gate Transit)	\$7.50	\$14.00	\$6.40	\$8.00	17%	75%
Oakland/San Francisco (AC Transit/WETA)	\$ 6.50 \$4.50*	\$5.75	\$6.00	\$6.00	8% -25%*	-4%

Source Notes:

(1) WETA fares: <https://sanfranciscobayferry.com/fares-tickets> & <https://sanfranciscobayferry.com/recovery>





(2) Golden Gate Fare Tables: <https://www.goldengate.org/bus/bus-fares-payment/fare-tables/>

(3) AC Transit Fares: <https://www.actransit.org/fares>

(4) Golden Gate (Sausalito, Larkspur) and WETA (Alameda/Oakland) service have no cash fare option; the paper ticket costs are used as placeholders for the cash costs

Ferry Fare Analysis

Farebox Recovery Ratios - Peer Case Studies

Ferry Service	Fiscal Year	Farebox Recovery
 <p>San Francisco Bay Ferry A SERVICE OF WETA</p>	2019	64%
 <p>NYC Ferry</p>	2019	24%
 <p>Ferry Connections Kitsap's Fast Ferries Future</p>	2019	26%
 <p>Washington State Ferries</p>	2017	78%

Source Notes:

(1) <https://weta.sanfranciscobayferry.com/filebrowser/download/476> (2) <https://cbcny.org/research/nyc-ferry-comparative-analysis> (3) <https://www.psrc.org/sites/default/files/210127-pof-study-report-only.pdf> (4) https://cbcny.org/sites/default/files/media/files/BLOG_ComparativeFerries_10072019.pdf

Treasure Island Program Pricing



Current

- Treasure Island Muni 25 - \$2.50/Trip

Proposed

- Treasure Island on/off Island Toll - \$5.00/Trip
- Treasure Island Transit Pass - \$150/Month
- Treasure Island Affordability Pass - \$75/Month

Electrical Infrastructure Planning



1. Develop vessel charging infrastructure requirements - cost estimates
2. Investigate potential for Treasure Island charging hub with WETA
3. Pursue funding in partnership with WETA

Next Steps

- Refine ferry service plan, operations and maintenance needs
- Develop fare and subsidy recommendation
- Develop funding strategy/business plan
- Complete study by early 2022

Thank you.



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