

Ferry Service Planning Updates



TREASURE ISLAND
MOBILITY MANAGEMENT AGENCY

Agenda Item #4
October 29, 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



Updated Ferry Demand: Overview

1. Updated Ferry Demand

- Recreational Demand
- Seasonal Demand

2. Proposed Service Plan

- Frequency
- Vessel Size



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		
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 CONTRACTING
OPPORTUNITIES TO
PROVIDE A 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)	\$4.50 \$ 6.50*	\$5.75	\$6.00	\$6.00	-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



San Francisco
County Transportation
Authority

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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