Ferry Service Planning Update
Today’s Presentation

- Treasure Island Today
- Ferry Planning Study
- Interim Ferry Service
- WETA’s 2050 Service Vision
- Electrification
- Ferry Service Business Plan
Treasure Island Today

- Almost 1,000 new homes will be completed by early next year
- Maceo May (105 units) is occupied - multiple other affordable buildings in development
- Several new parks recently opened
- West Side Bridges, Hillcrest, Multi-Use Path in progress on YBI
- Disposition and Development Agreement Amendment ensures continued momentum
TI Ferry Planning Study

● Study scope
  - Ridership demand projections
  - Service scenarios
  - Operating costs and revenue/subsidy analysis

● Year 1 ridership demand projections
  - 650-725 weekday trips
  - 415-460 weekend trips

● Based on 2021 assumptions
  - 2021 development schedule
  - Toll in place, $2.75 fare

Photo by Sergio Ruiz
## Scenarios Studied

<table>
<thead>
<tr>
<th>#</th>
<th>DAYS/HOURS OF SERVICE</th>
<th>FREQUENCY</th>
<th>VESSELS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Peak Only Weekday</td>
<td>Hourly</td>
<td>1 Diesel</td>
</tr>
<tr>
<td>2</td>
<td>Peak Only Weekday</td>
<td>Hourly</td>
<td>1 Diesel</td>
</tr>
<tr>
<td></td>
<td>All-Day Weekend</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Peak Only Weekday</td>
<td>Hourly</td>
<td>1 Electric</td>
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<tr>
<td></td>
<td>All-Day Weekend</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>All Day Weekday</td>
<td>40-60 minutes</td>
<td>1 Electric</td>
</tr>
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<td></td>
<td>All-Day Weekend</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>All Day Weekday</td>
<td>30 minutes</td>
<td>2 Electric</td>
</tr>
<tr>
<td></td>
<td>All-Day Weekend</td>
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<td></td>
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</tbody>
</table>
## Preliminary Operating Cost Comparison

<table>
<thead>
<tr>
<th>#</th>
<th>DAYS/HOURS OF SERVICE</th>
<th>FREQUENCY</th>
<th>VESSELS</th>
<th>ANNUAL O&amp;M COST ($2022)</th>
<th>COST PER OPERATING HOUR</th>
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</thead>
<tbody>
<tr>
<td>3</td>
<td>Peak Only Weekday All-Day Weekend</td>
<td>Hourly</td>
<td>1 Electric</td>
<td>$2.6M</td>
<td>$1,155</td>
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<td>4</td>
<td>All Day Weekday All-Day Weekend</td>
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<td>1 Electric</td>
<td>$3.2M</td>
<td>$873</td>
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<tr>
<td>5</td>
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<td>30 minutes</td>
<td>2 Electric</td>
<td>$6.3M</td>
<td>$873</td>
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## Fare Revenue Analysis (Scenario 4, 2025)

<table>
<thead>
<tr>
<th>BASE CASH FARE</th>
<th>ANNUAL RIDERSHIP</th>
<th>TOTAL REVENUE</th>
<th>OPERATING SHORTFALL ($2025)</th>
<th>FAREBOX RECOVERY RATIO</th>
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</thead>
<tbody>
<tr>
<td>$5.00</td>
<td>213,000</td>
<td>$1.1M</td>
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<td>-$2.6M</td>
<td>23%</td>
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Ferry Planning Study Guidance

● Provide all day weekday & weekend service with electric vessels
  - At least hourly frequency
  - Increase frequency with development and occupancy

● Refine O&M costs and identify subsidy of ~$2.5M per year

● Define roles and responsibilities for stakeholder parties

● Develop a business plan for TI ferry service
Interim Ferry Service

- TICD initiated ferry service in March 2022
- Weekdays 7:30am to 8:20pm and 9:30am to 8:50pm on weekends
  - Frequency varies, from 35 min to high of 120
- One-way fare is $5.00
  - Monthly pass available for $150
- High ridership for special events e.g. TreasureFest

Photo by Brian-Kitts-Visuals_briankittsvisuals-com
WETA’s 2050 Service Vision

● Adopted by WETA’s board in May 2024
● Vision for regional ferry system and criteria for expansion
● Treasure Island and Mission Bay service proposed in Tier 1
Electrification

- WETA’s Rapid Electric Emission-Free Ferry program - $127M secured
- Ferry routes of 3 nautical miles or less must be zero emission by 2026
  - SF Ferry Building to Treasure Island
  - SF Ferry Building to Mission Bay
- RFP for 149-passenger electric vessel construction this summer
- TI charging infrastructure design underway
  - Requires full funding
Ferry Service Business Plan

We will undertake the Business Plan with WETA in FY25:

- Updated development schedule
- Updated ridership projections
- Service plan
- Operations and Maintenance costs including capital maintenance
- Fare policy and fare structures
- Funding strategy / subsidy needed
- Roles and responsibilities
Thank you.

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