

# Golden Gate Ferry

**2013 Passenger Study**

Draft

## Survey Findings Report

Conducted  
by:

**Redhill Group**  
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**redhillgroup**  
THE POWER OF INSIGHT

# TABLE OF CONTENTS

<b>EXECUTIVE SUMMARY .....</b>	<b>1</b>
METHODOLOGY .....	1
KEY FINDINGS .....	2
<b>GOLDEN GATE FERRY WEEKDAY RIDERSHIP .....</b>	<b>5</b>
WEEKDAY TRIP CHARACTERISTICS.....	5
WEEKDAY FARE MEDIA.....	17
WEEKDAY TRANSPORTATION DEMOGRAPHICS .....	19
WEEKDAY RIDER DEMOGRAPHICS.....	21
<b>GOLDEN GATE FERRY WEEKEND RIDERSHIP .....</b>	<b>29</b>
WEEKEND TRIP CHARACTERISTICS .....	29
WEEKEND FARE MEDIA .....	40
WEEKEND TRANSPORTATION DEMOGRAPHICS .....	42
WEEKEND RIDER DEMOGRAPHICS.....	44
<b>GOLDEN GATE FERRY AT&amp;T RIDERSHIP .....</b>	<b>53</b>
SURVEY BACKGROUND .....	53
KEY FINDINGS .....	53
AT&T TRIP CHARACTERISTICS .....	54
AT&T FARE MEDIA .....	56
AT&T TRANSPORTATION DEMOGRAPHICS .....	57
AT&T RIDER DEMOGRAPHICS.....	57

## LIST OF FIGURES

Figure 1: Is Home Your Origin or Destination? .....	5
Figure 2: What Is Your Home Based Trip Purpose? .....	6
Figure 3: What Is Your Non-Home Based Trip Purpose? .....	7
Figure 4: How Do You Get From Your Home To Your First Boarding Point? .....	8
Figure 5: How Many Minutes Is Your Walk From Home To Your First Boarding Point? .....	9
Figure 6: How Many Miles Is It From Your Home To Your First Boarding Point?.....	10
Figure 7: How Many Transfers Are Needed To Complete Your Trip?.....	11
Figure 8: How Do You Get From Your Last Stop To Your Non-Home Destination? .....	12
Figure 9: How Many Minutes Is Your Walk from Your Last Stop To Your Non-Home Destination?.....	13
Figure 10: How Many Miles Is It From Your Last Stop To Your Non-Home Destination? .	14
Figure 11: If the Golden Gate Ferry Was Not Available, How Would You Have Made Your Trip? .....	15
Figure 12: How Long Have You Been Riding Golden Gate Ferries? .....	16
Figure 13: How Do You Pay For Your Ferry Fare? .....	17
Figure 14: What Type of Fare Do You Pay? .....	18
Figure 15: Do You Currently Have a Driver's License? .....	19
Figure 16: How Many Drivable Vehicles Are Available To Your Household? .....	20
Figure 17: Are You Currently Employed and/or a Student? .....	21
Figure 18: How Many People Are Employed in Your Household?.....	22
Figure 19: What Is Your Age Category? .....	23
Figure 20: Are You Hispanic, Latino or of Spanish Origin?.....	24
Figure 21: Which of the Following Do You Identify With? .....	24
Figure 22: Do You Speak a Language Other Than English at Home? .....	25
Figure 23: What Language Other Than English Do You Speak at Home? .....	26
Figure 24: How Well Would You Say You Speak English?.....	27
Figure 25: What is Your Total Household Income? .....	28
Figure 26: Gender.....	28
Figure 27: Weekend – Is Home Your Origin or Destination? .....	29

Figure 28: Weekend – What Is Your Home-Based Trip Purpose?.....30

Figure 29: Weekend – How Do You Get From Your Home To Your First Boarding Point? .....31

Figure 30: Weekend – How Many Minutes Is Your Walk From Home To Your First Boarding Point? .....32

Figure 31: Weekend – How Many Miles Is It From Your Home To Your First Boarding Point? .....33

Figure 32: Weekend – How Many Transfers Are Needed To Complete Your Trip? .....34

Figure 33: Weekend – How Do You Get From Your Last Stop To Your Non-Home Destination?.....35

Figure 34: Weekend – How Many Minutes Is Your Walk From Your Last Stop To Your Non-Home Destination? .....36

Figure 35: Weekend – How Many Miles Is It From Your Last Stop To Your Non-Home Destination?.....37

Figure 36: Weekend – If the Golden Gate Ferry Was Not Available, How Would You Have Made Your Trip? .....38

Figure 37: Weekend – How Long Have You Been Riding Golden Gate Ferries? .....39

Figure 38: Weekend – How Do You Pay For Your Ferry Fare?.....40

Figure 39: Weekend – What Type of Fare Do You Pay? .....41

Figure 40: Weekend – Do You Currently Have a Driver’s License? .....42

Figure 41: Weekend – How Many Drivable Vehicles Are Available To Your Household? .....43

Figure 42: Weekend – Are You Currently Employed and/or a Student?.....44

Figure 43: Weekend – How Many People Are Employed in Your Household?.....45

Figure 44: Weekend – What Is Your Age Category? .....46

Figure 45: Weekend – Are You Hispanic, Latino or of Spanish Origin?.....47

Figure 46: Weekend – Which of the Following do You Identify With?.....47

Figure 47: Weekend – Do You Speak a Language Other Than English at Home? .....48

Figure 48: Weekend – What Language Other Than English Do You Speak at Home? ....49

Figure 49: Weekend – How Well Would You Say You Speak English?.....50

Figure 50: Weekend – What is Your Total Household Income? .....51

Figure 51: Weekend – Gender.....52

Figure 52: AT&T - How Do You Get From Your Origin To Your First Boarding Point? .....54

Figure 53: AT&T - If the Golden Gate Transit Ferry Was Not Available, How Would  
You Have Made Your Trip? .....55

Figure 54: AT&T - How Do You Pay For Your Ferry Fare? .....56

Figure 55: AT&T - What Is Your Age Category? .....58

Figure 56: AT&T - What is Your Total Household Income? .....59

Figure 57: AT&T - Gender .....60

# EXECUTIVE SUMMARY

## METHODOLOGY

Under contract to the MTC, Redhill Group conducted a survey of Golden Gate Ferry riders to provide accurate trip information to support planning initiatives. The survey included traditional demographics, languages spoken, fare media and selected attitudinal questions. The survey employs a methodology that includes a brief, two-minute onboard survey that is limited to origin and destination-types and rider contact information. This much shorter initial survey format leads to significantly higher rider participation compared to traditional onboard surveys and minimizes non-response bias for short trips.

The short onboard survey is followed up by a telephone survey that incorporates real-time trip mapping. Replacing a detailed self-administered paper and pencil survey with a telephone survey minimizes literacy issues that often result in non-response bias.

The real-time trip mapping component also ensures that each component of a rider's complete trip is accurately captured including all trip segments, transfers, and logical access and egress information. Together, these enhancements in survey methodology produce a more accurate picture of true travel patterns, enabling more effective route and schedule planning.

The goal of the survey is to collect a representative sample of five percent of all boardings for riders 16 or older. Since almost all riders do round-trips the average number of boardings per unique rider is estimated at two per day. Accordingly the five percent boarding figure equates to 10 percent of all riders.

The sampling plan for weekday riders was established at 340 which is five percent of average daily weekday boardings. The actual number of weekday surveys completed was 374. Weekday survey quotas were established by line, direction and daypart (Early AM 5:00 to 5:59 AM; AM Peak 6:00 to 9:59 AM; Midday 10:00 AM to 2:59 PM; PM Peak 3:00 to 6:59 PM; and Night 7:00 - 9:00 PM). Where the individual combination of line, direction and daypart produced fewer than 100 boardings, cells were combined with the most logical contiguous daypart(s) to produce a survey target of at least five respondents.

Field surveying was conducted between September 18<sup>th</sup> and September 25<sup>th</sup>, 2013. Follow-up telephone surveying was between October 11<sup>th</sup> and November 4<sup>th</sup> 2013. Final results for the surveying process included a total of 374 weekday and 181 weekend phone surveys, and 1,663 weekday and 614 weekend field surveys.

An additional methodology change was implemented to provide more actionable reporting by combining all home based trips, creating a new home-based trip purpose by reversing trips that were home-bound. This provides a clearer picture of outbound trips.

## KEY FINDINGS

### WEEKDAY

- The distribution of home-based trip purposes is primarily focused on work with work and business appointments accounting for 80 percent. This is followed by social/recreational trips accounting for 16 percent and no other category was greater than one percent.
- The trip purpose distribution is in line with employment figures as 90 percent of weekday riders indicate that they work (87% work only, and 3% work and attend school). Five percent are students, and nine percent neither work nor attend school.
- The majority of riders (66%) access transit from home by driving alone while 18 percent walk to reach the first boarding point. The remaining 16 percent either ride a bicycle (7%), use a carpool (5%), or get dropped off (4%). The average access walk time is 10.3 minutes and 40 percent walk five minutes or less. For the 82 percent of riders who do not walk to their first stop, the average distance from home to their first transit stop is 9.0 miles.
- The vast majority of riders (87%) walk from their last stop to their non-home destination. The average walk time is 10.7 minutes. Seven percent of riders use a bicycle as an egress mode. The remaining six percent use other forms of vehicular modes which include driving alone (2%), using a taxi (2%), carpooling (1%), and being picked up (1%). The average distance for these modes is 4.4 miles.
- More than four out of five Golden Gate Ferry riders (84%) complete their one-way trip without transferring to or from public transit. Fifteen percent make one transfer and only one percent require two or more transfers.
- If a Golden Gate ferry was not available, 40 percent of riders would drive alone and 37 percent say they would take a Bus. Nine percent indicate that they would not make the trip.
- Nearly half (46%) of weekday riders have been riding Golden Gate ferries at least five years. At the other end of the spectrum, 30 percent of riders have been riding less than a year. The median longevity for weekday riders is 4.1 years.
- Cash on a Clipper Card, is the predominant way of paying at 81 percent. This is followed by cash in the form of bills or coins used to purchase a Clipper limited use ticket at 17 percent. A majority of riders (91%) also pay a full adult fare, while nine percent receive a senior discount.
- Almost all Golden Gate ferry riders are “choice riders” since 97 percent have a driver’s license and 97 percent have at least one vehicle available to their household.

- Sixteen percent of Golden Gate ferry riders speak a language other than English at home. The percentages, boardings, and estimated unique riders that speak languages other than English at home are: Spanish (5%, 315 boardings, 158 riders), French (2%, 167 boardings, 84 riders), Russian (1%, 58 boardings, 29 riders), Chinese Mandarin (1%, 57 boardings, 29 riders), Chinese-Cantonese (1%, 37 boardings, 19 riders) and Tagalog (1%, 36 boardings 18 riders). Ninety-eight percent of riders who speak a non-English language at home say that they speak English either “Well” or “Very Well.” This translates into less than one percent of all riders that speak English “Not Well” or “Not at All.”

## WEEKEND

Key differences in findings for weekend riders compared to weekday riders are as follows:

- As might be expected, the trip purpose for weekend riders is much more oriented toward social/recreational trips (77%) in contrast with weekday riders whose trips are work-oriented (80%).
- Access mode for weekend riders is also different with a higher proportion walking (36% vs. 18%) and a lower proportion driving alone (27% vs. 66%).
- When asked how they would make their trip if the Golden Gate ferry was not available, weekend riders were much more likely than weekday riders (32% vs. 9%) to say they would not make the trip, which is logical given 77 percent of trips are for social/recreational purposes. Only 18 percent would drive alone compared to 40 percent for weekday riders.
- Weekend riders have been riding for a shorter median number of years than weekday riders (2.6 vs. 4.1) which is partially due to a higher percentage of first time riders (23% vs. 8%).
- Similar to the weekday distribution (98%), the majority of weekend Golden Gate ferry riders (97%) use cash to pay their transit fare. The type of cash payment, however, is different on the weekend with a higher proportion using bills/coins to purchase a Clipper limited use ticket (50% vs. 17%), and a lower proportion using cash on a Clipper Card (47% vs. 81%).
- The proportion of weekend riders who work (70%) is significantly lower than for weekday riders (90%). Conversely, 25 percent of weekend riders are neither workers nor students, compared to nine percent during the weekday.

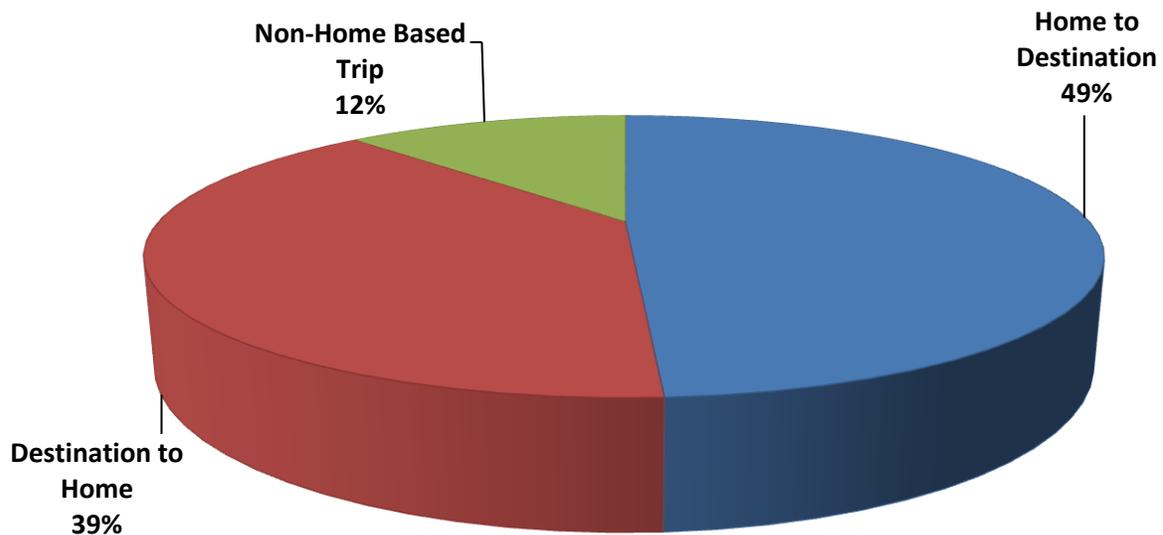
- In line with the lower percentage of employed weekend riders, the weekend income distribution is lower with 33 percent below \$75,000 compared to 21 percent for weekdays. The weekend age distribution is also more even than for weekdays with a higher proportion riders under 30 (22% vs. 13%) and 60 or older (23% vs. 15%).

# GOLDEN GATE FERRY WEEKDAY RIDERSHIP

## WEEKDAY TRIP CHARACTERISTICS

Golden Gate Ferry weekday riders were surveyed on the Larkspur and Sausalito Ferries, traveling in both route directions. A total of 374 Computer-assisted telephone interviewing (CATI) surveys were completed for riders on trips between 5:00 AM and 9:00 PM. Of all Golden Gate Ferry riders' trips, 88 percent have origins or destinations that are their "Home," leaving a remainder of 12 percent of riders traveling between two non-home locations.

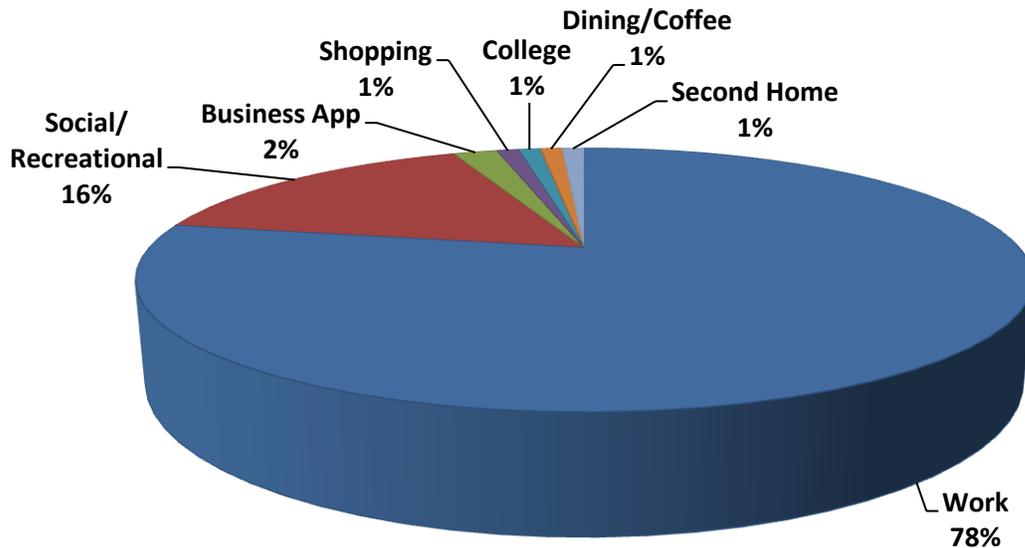
**Figure 1: Is Home Your Origin or Destination?**  
n=374



In traditional onboard survey reporting, all origins are reported collectively regardless of the trip's direction or purpose. This results in the information about trip origins and public transit access being a combination of home, work, and other starting locations. This methodology does not produce a clear and meaningful representation of riders' trips from home to the first transit point, or of the final leg of the trip from the last alighting point to the ultimate destination.

To create a more meaningful representation of riders' public transit interaction, survey results are presented from a modified database of trips in relation to riders' homes. This approach creates a consistent picture of boarding accessibility from riders' ultimate origin, as well as the relationship between their last alighting point to their final destination to create a more meaningful and actionable picture of rider's trip behavior.

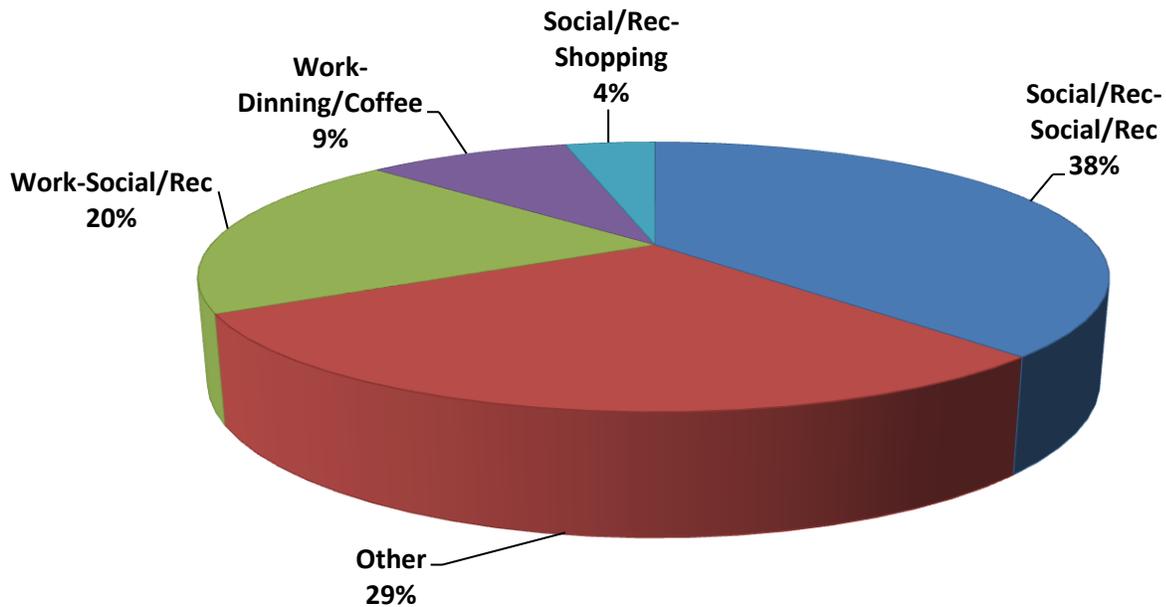
**Figure 2: What Is Your Home Based Trip Purpose?**  
n=327



Weekday Golden Gate Ferry riders' most common home-based trip purpose is work-related, which accounts for 80 percent of ridership. This is a combination of 78 percent traveling to "Work," and two percent ridership traveling to a "Business Appointment." The work figure is consistent with the percentage of employed riders at 90 percent.

Social/recreational trips are the second most common trip purpose accounting for 16 percent of trips. The remaining four percent of trips includes riders whose trip purpose is shopping, college, dining/coffee, and a second home, with each comprising one percent of trips.

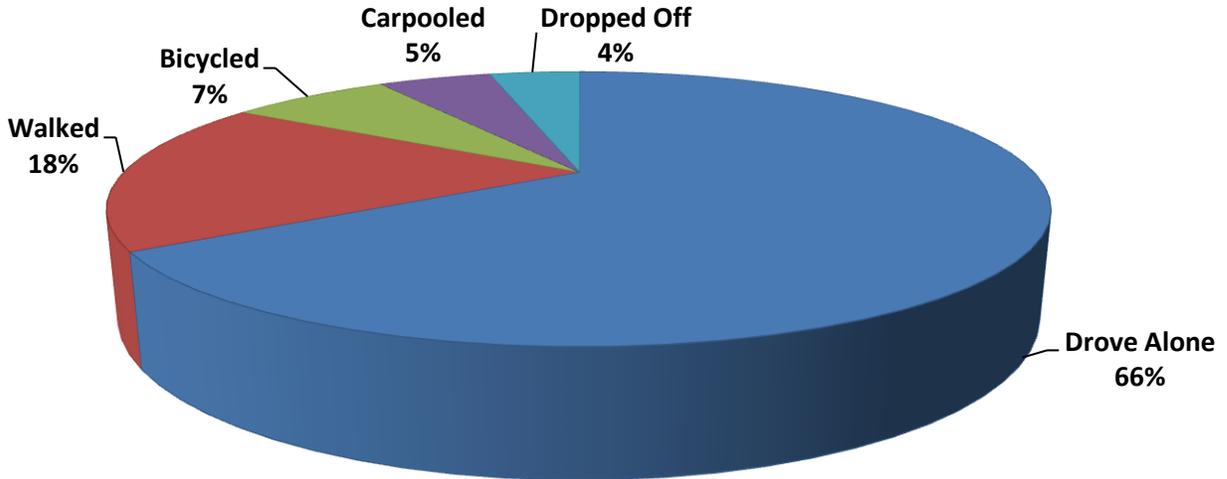
**Figure 3: What Is Your Non-Home Based Trip Purpose?**  
n=47



Twelve percent of weekday trips neither start nor end at home. Since there is no anchor to the trip such as home, there are numerous possible origin-destination combinations, most of which account for less than three percent of all responses. In general, over half of non-home-based ferry trips involve social/recreational for at least one end of the trip.

The most common non-home based trips are riders with “Social/Recreational” at both ends of the trip (38%), “Work” to “Social/Recreational” (20%), and “Social/Recreational” to “Shopping” (4%). Trips occurring between “Work” and “Dining/Coffee” account for nine percent while all other permutations of non-home based trips which did not have a specified category are grouped into “Other”, and account for 29 percent.

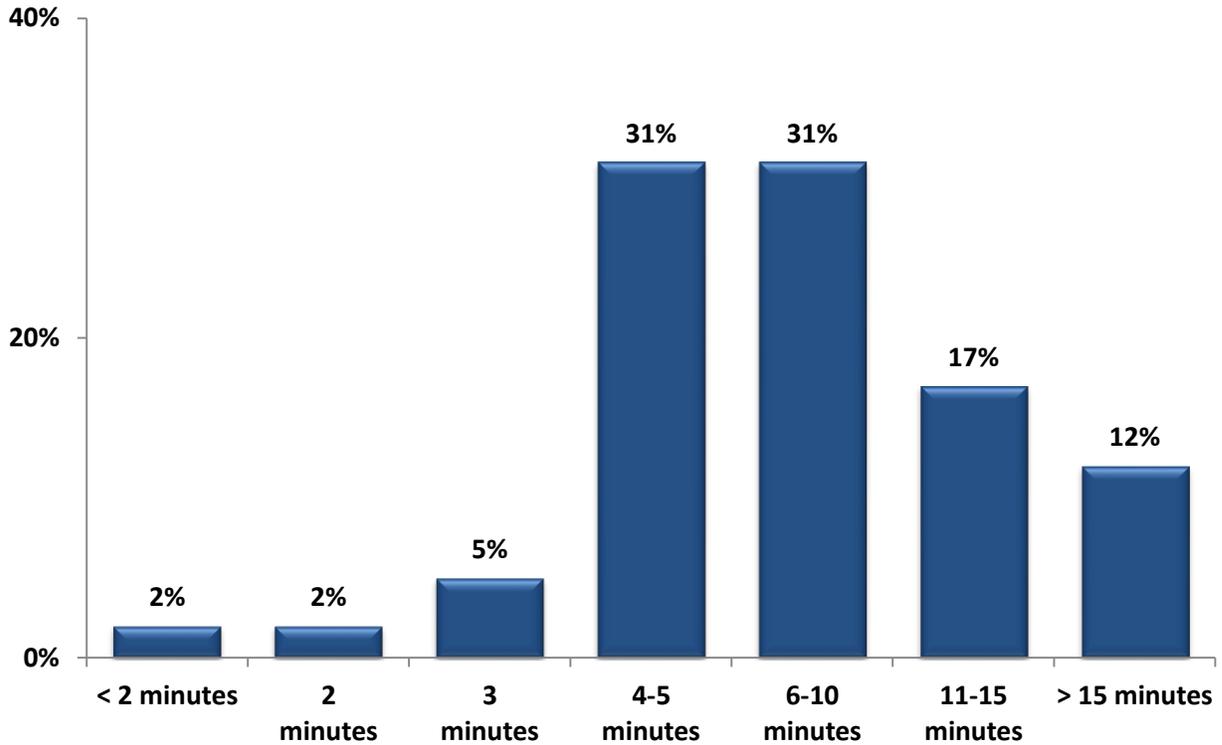
**Figure 4: How Do You Get From Your Home to Your First Boarding Point?**  
n=327



Approximately two-thirds of weekday riders (66%) “Drove Alone” from their home to their first boarding point. Other vehicular modes account for nine percent of the trips including “Carpooled<sup>1</sup>” (5%) and “Dropped-Off” (4%). Non-motorized travel modes account for one-quarter (25%) of the trips and include “Walking” (18%) and “Bicycling” (7%).

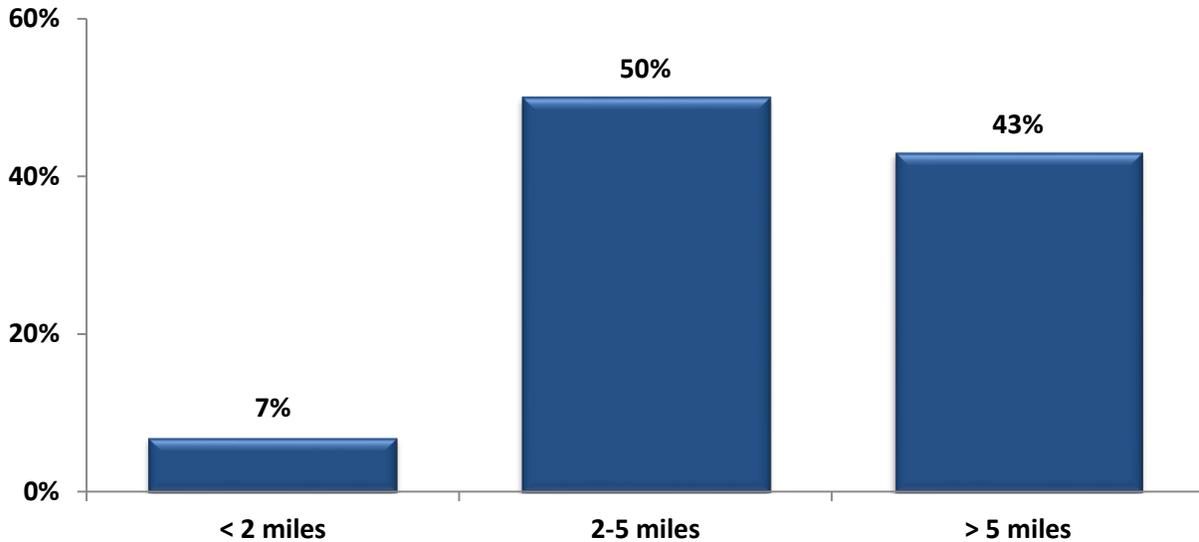
<sup>1</sup> The carpool category includes vanpools and non-public shuttles such as pick-up vans for medical facilities, employers or schools. Public shuttles are accounted for as a trip transfer.

**Figure 5: How Many Minutes Is Your Walk From Home to Your First Boarding Point?**  
n=60



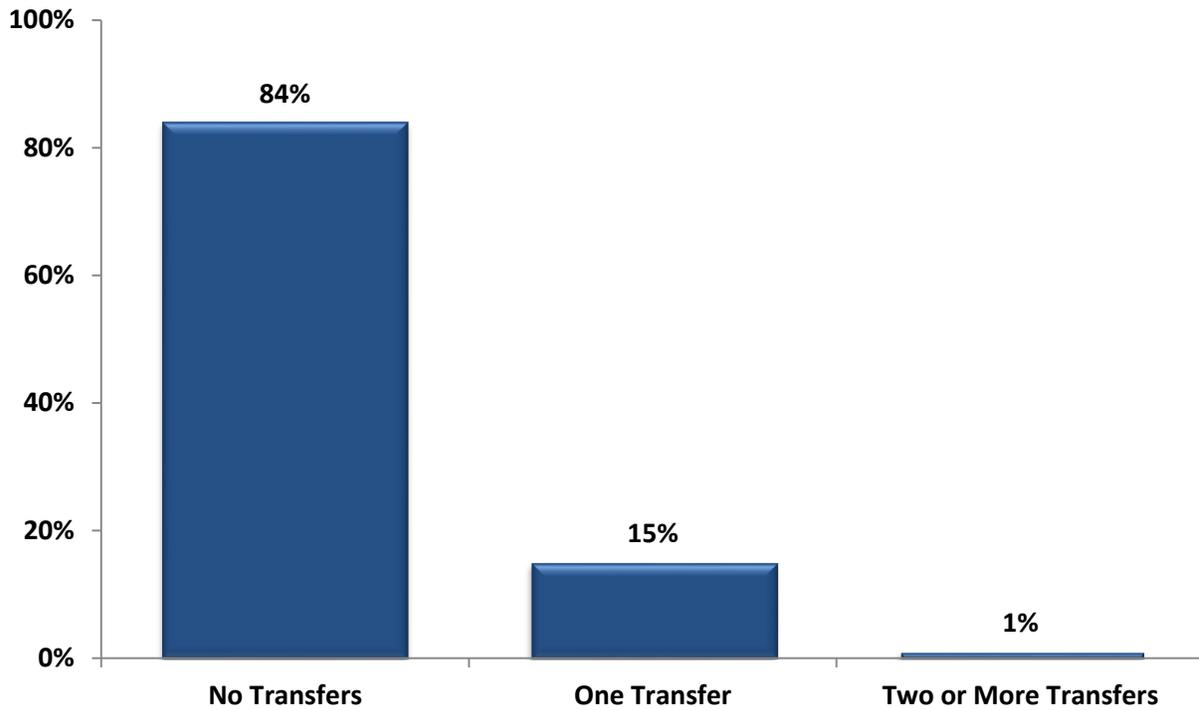
For the 18 percent of weekday trips made by riders who “Walk” from home to their first boarding point, 40 percent have a walk time of five or fewer minutes. At the other end of the spectrum, approximately one-third (31%) walk between six and 10 minutes, and 29 percent walk 10 minutes or longer to reach their first boarding point. The overall average walk time from home to the first boarding point is 10.3 minutes.

**Figure 6: How Many Miles Is It From  
Your Home To Your First Boarding Point?  
(Non-Walkers Only)  
n=267**



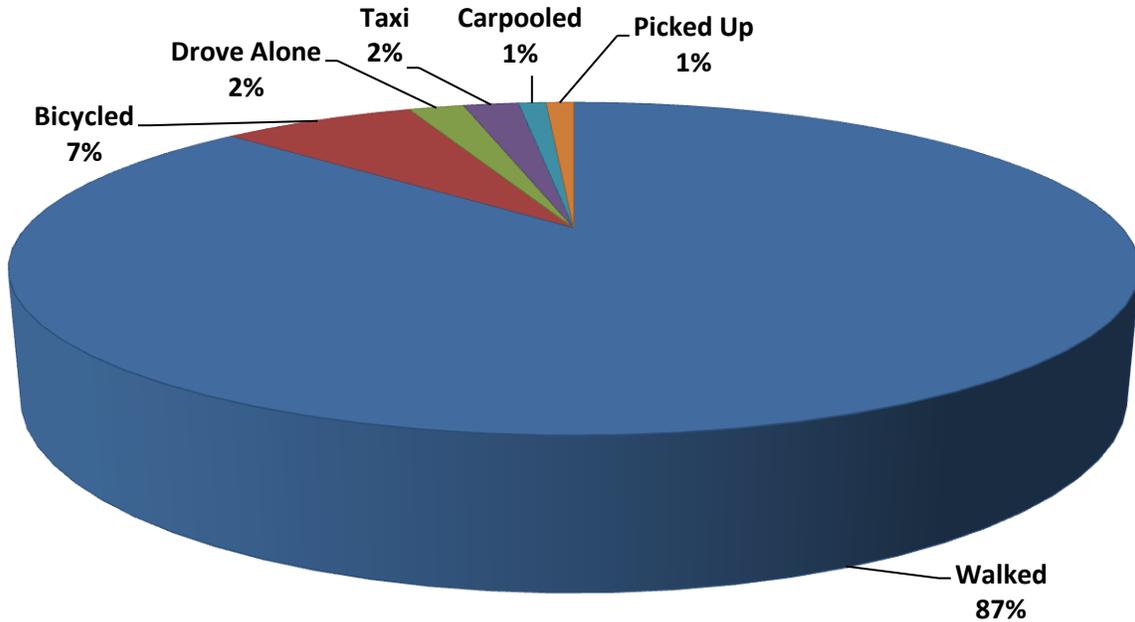
Among the 82 percent of weekday riders who access their first boarding point by a mode other than walking, over half of riders travel five miles or less (57%). This figure is split between riders who travel less than two miles (7%), and those who travel two to five miles (50%). The remaining 43 percent of non-walkers who reach their first boarding point travel over five miles. The average distance traveled from home to the first boarding point is 9.0 miles.

**Figure 7: How Many Transfers Are Needed To Complete Your Trip?**  
n=374



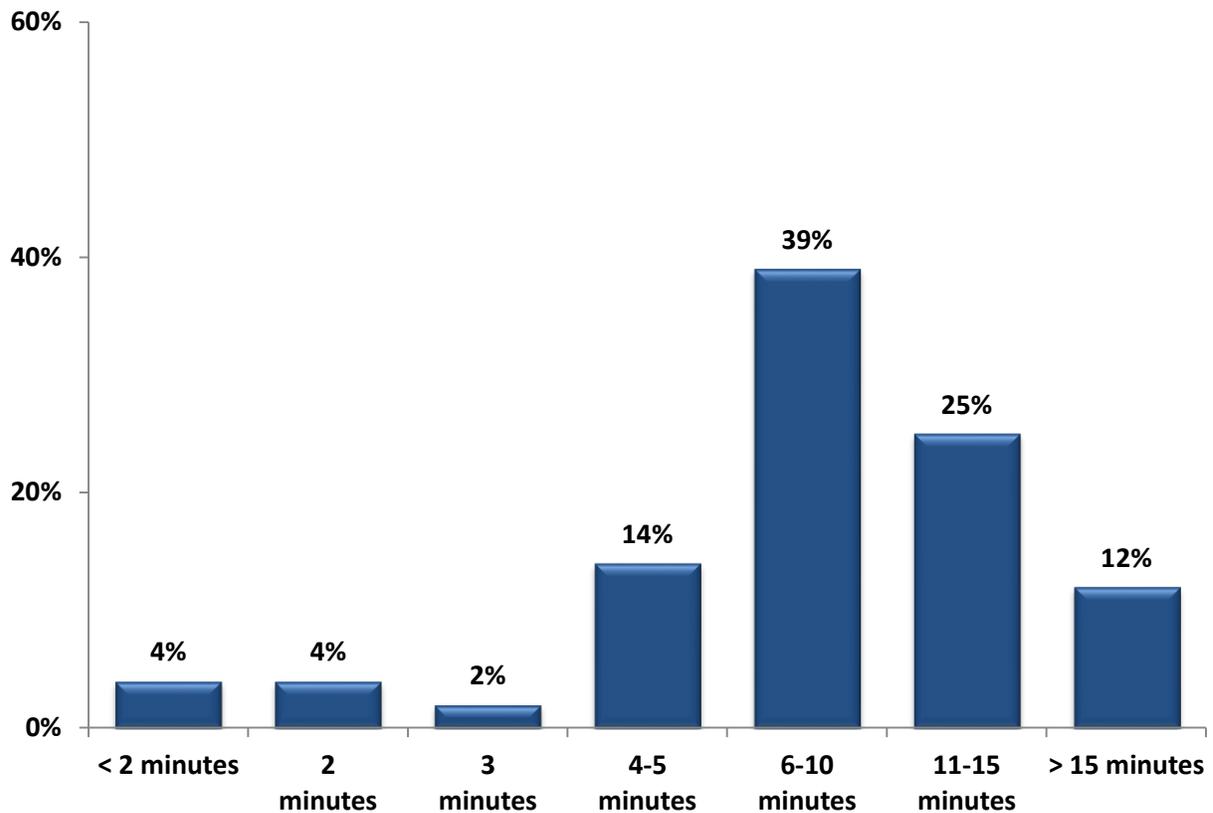
More than four out of five (84%) weekday Golden Gate Ferry riders complete their trip with no transfers. Of the 16 percent of riders that do transfer, 15 percent make only one transfer to complete their trip and only one percent of riders require two or more transfers to reach their destination. The average number of transfers is 0.2 which equates to 1.2 trip segments.

**Figure 8: How Do You Get From Your Last Stop to Your Non-Home Destination?**  
n=326



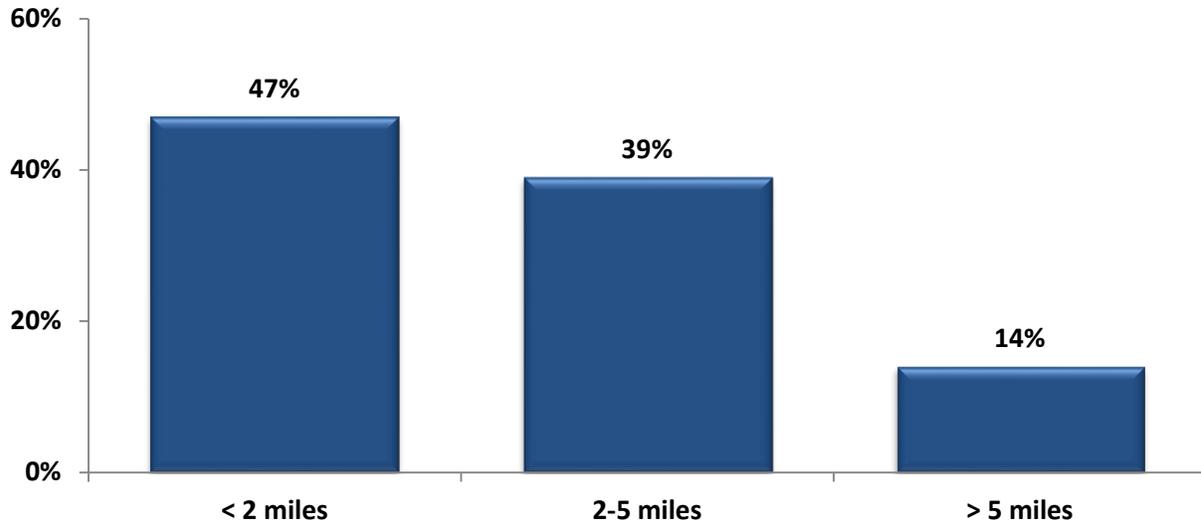
The vast majority of riders (87%) “Walk” from their last stop to their non-home destination. Seven percent of riders use a “Bicycle” as an egress mode. The remaining six percent use other forms of vehicular modes which include those who “Drive Alone” (2%), use a “Taxi” (2%), “Carpool” (1%), and are “Picked Up” (1%).

**Figure 9: How Many Minutes Is Your Walk from Your Last Stop To Your Non-Home Destination?**  
n=283



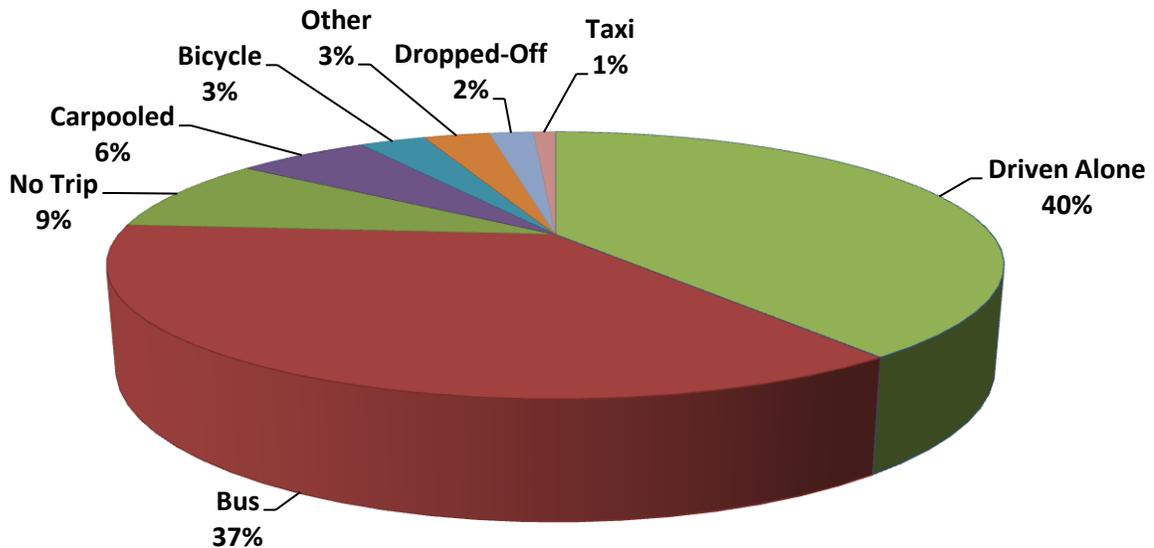
The 87 percent of riders who walk to their non-home destination from their last transit stop are most likely to have a walk time of six to ten minutes (39%). One-quarter (24%) of riders walk five minutes or less to reach their non-home destination. Another quarter (25%) walk 11 to 15 minutes, and 12 percent walk more than 15 minutes. The overall average walk time for riders to reach their destination from their last alighting point is 10.7 minutes.

**Figure 10: How Many Miles Is It From Your Last Stop To Your Non-Home Destination? (Non-Walkers)**  
n=44



For the small percentage of riders (13%) who do not walk from their last alighting point, nearly half (47%) travel less than two miles to reach their final destination. An additional 39 percent travel between two and five miles, and the remaining 14 percent travel more than five miles to reach their non-home destination. The average distance traveled by non-walkers to their non-home destination is 4.4 miles.

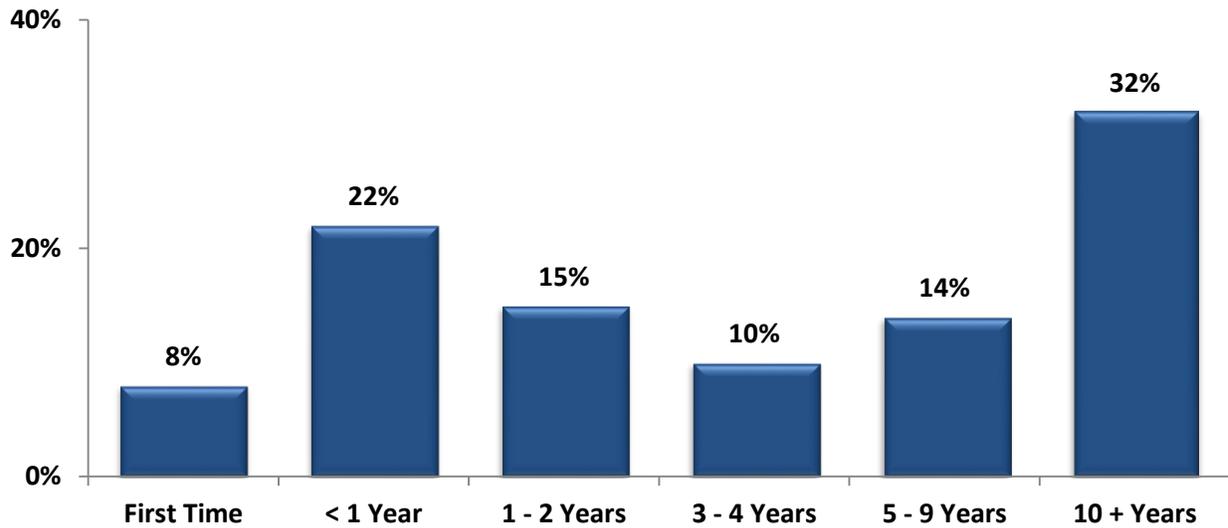
**Figure 11: If the Golden Gate Ferry Was Not Available,  
How Would You Have Made Your Trip?  
n=374**



There are two main travel modes the respondents would choose should the Golden Gate Ferry become unavailable. Forty percent of riders would drive alone, followed at almost the same level by 37 percent that say that they would take a Bus. Nine percent say that if the ferry was not available, they would not make their trip. Other vehicular modes, such as carpooling, being dropped-off, or taxi are less preferred as an alternative travel mode and account for six, two, and one percent respectively. Three percent of riders would have ridden their bicycle if the ferry was not available. Riders who chose “Other” (3%) include those who would use another transit agency such as BART.<sup>2</sup>

<sup>2</sup> Percentages do not add up to 100% due to rounding.

**Figure 12: How Long Have You Been Riding Golden Gate Ferries?**  
n=374

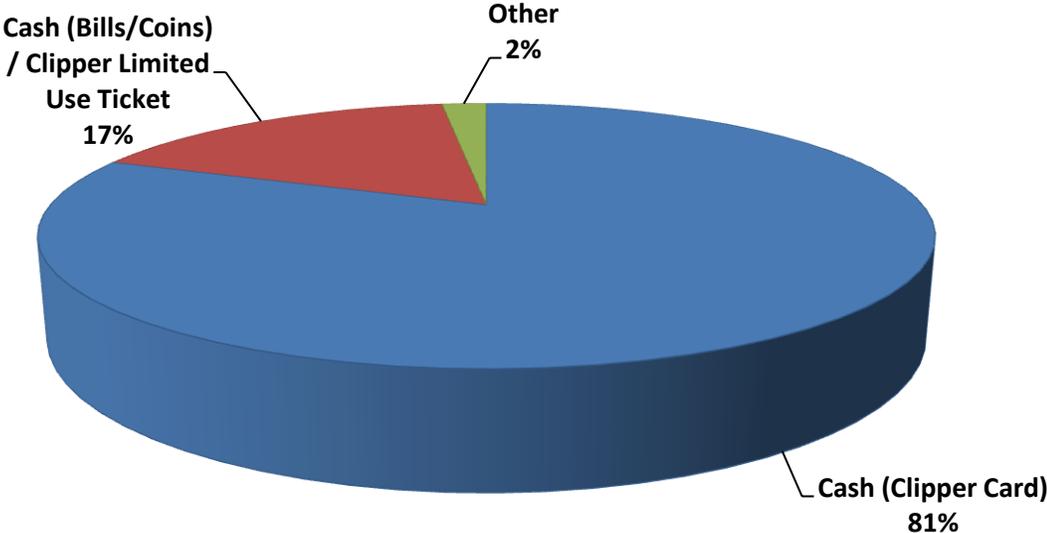


The distribution of Golden Gate Ferry ridership longevity is relatively even across the categories of one to two years, three to four years and five to nine years. However, the largest proportion of riders is either new within the last year (30%) or has been riding for 10 or more years (32%). In between these two extremes are riders who have been using the ferry for one to two years (15%), three to four years (10%), and five to nine years (14%).<sup>3</sup> The median longevity for weekday riders is 4.1 years.

<sup>3</sup> Percentages do not add up to 100% due to rounding.

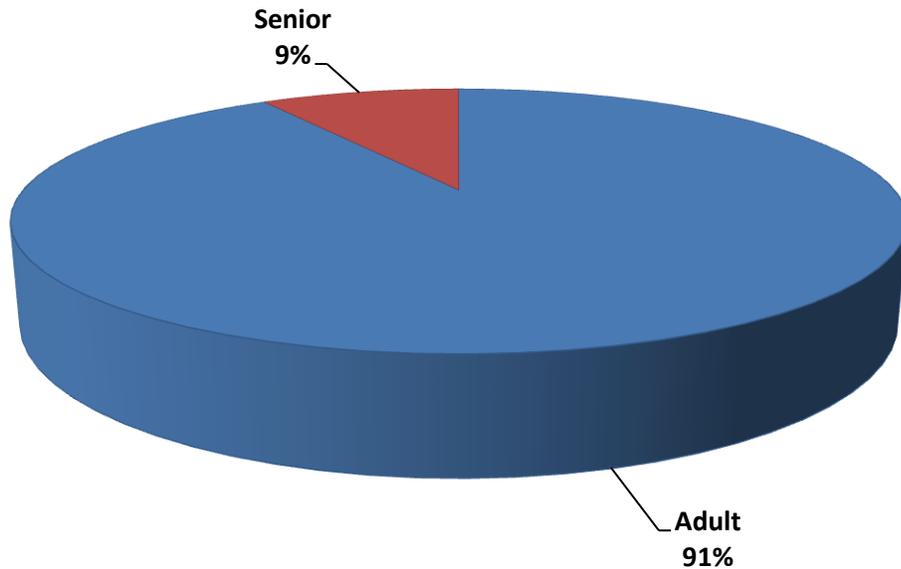
# WEEKDAY FARE MEDIA

**Figure 13: How Do You Pay For Your Ferry Fare?**  
n=374



A vast majority of riders (98%) use some form of Cash to pay their transit fare: “Cash on a Clipper Card” (81%) is the most common, followed by “Cash in the Form of Bills and Coins” which is used to purchase a Clipper Limited Use Ticket (17%). “Other” non-cash type of fares, such as “online purchase” or “free/gift,” account for two percent of the ridership.

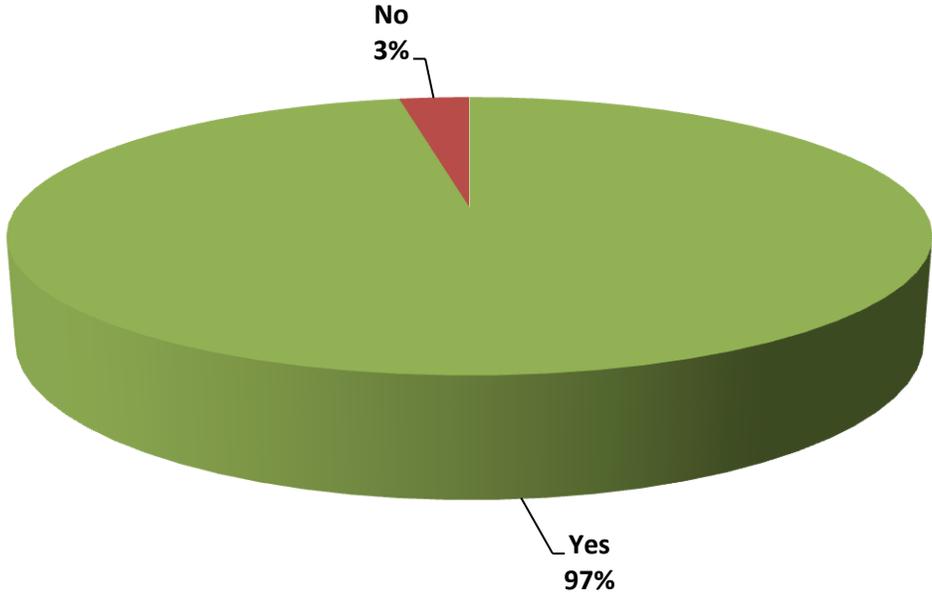
**Figure 14: What Type of Fare Do You Pay?**  
n=374



There are two fare types identified among Golden Gate Ferry riders. The vast majority (91%) pay a full “Adult” fare and the remaining (9%) receive a “Senior” discount. As would be expected, riders in their 60’s are more likely to pay a senior fare (53%), than younger riders (less than 1%).

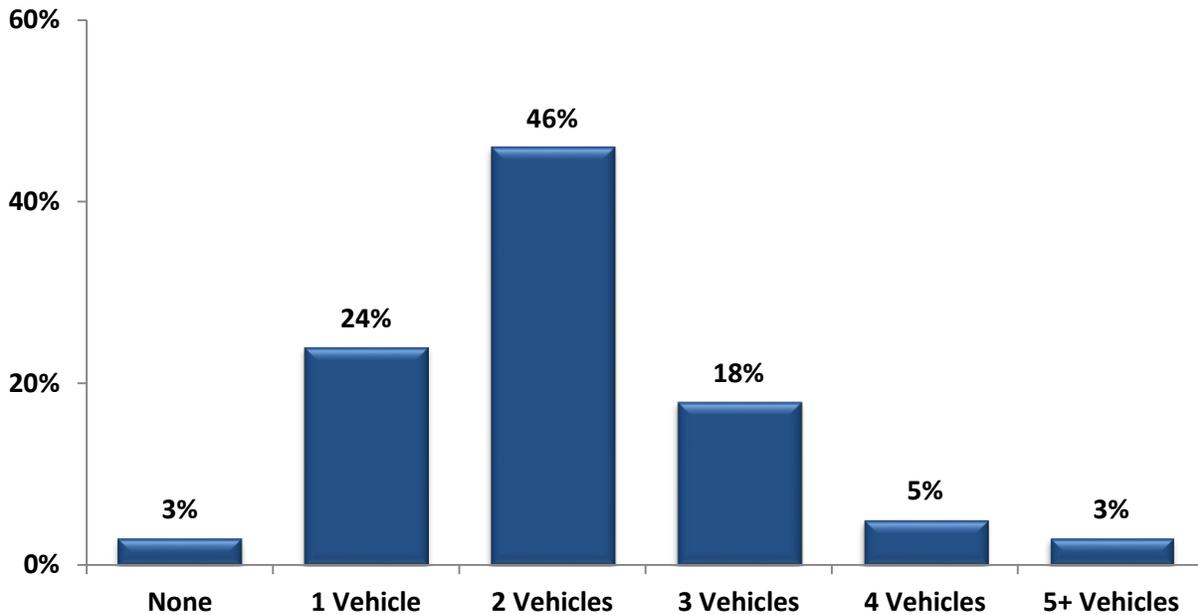
# WEEKDAY TRANSPORTATION DEMOGRAPHICS

Figure 15: Do You Currently Have a Driver's License?  
n=374



A very small proportion of weekday Golden Gate Ferry riders (3%) do not currently have a driver's license, and thus are transit dependent.

**Figure 16: How Many Drivable Vehicles Are Available To Your Household?**  
n=374



Consistent with possession of a driver's license, 97 percent of weekday riders have a drivable vehicle available to their household. One-quarter (24%) of riders have one vehicle available, and nearly half (46%) have two drivable vehicles in their household. With each increase in the number of vehicles, the percentage of riders declines from the previous category (3 vehicles-18%, 4 vehicles-5%, and 5 or more-3%).<sup>4</sup>

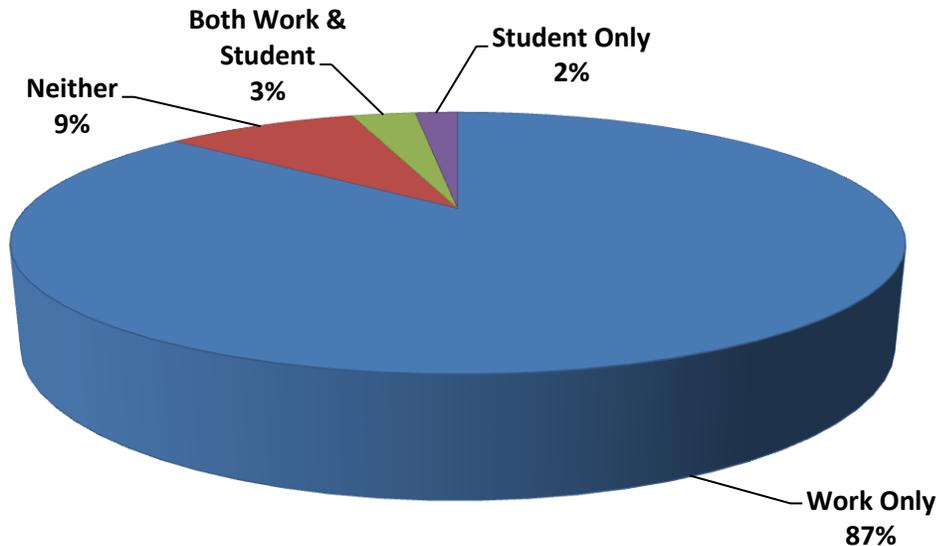
Student riders are slightly less likely than non-student riders to have a drivable vehicle available to their household (88% vs. 97% respectively). In addition, riders without transfers (98%) are more likely to own a vehicle than those with transfers (88%)

The overall average number of drivable vehicles per household is 2.1 vehicles.

<sup>4</sup> Percentages do not add up to 100% due to rounding.

## WEEKDAY RIDER DEMOGRAPHICS

Figure 17: Are You Currently Employed and/or a Student?  
n=374

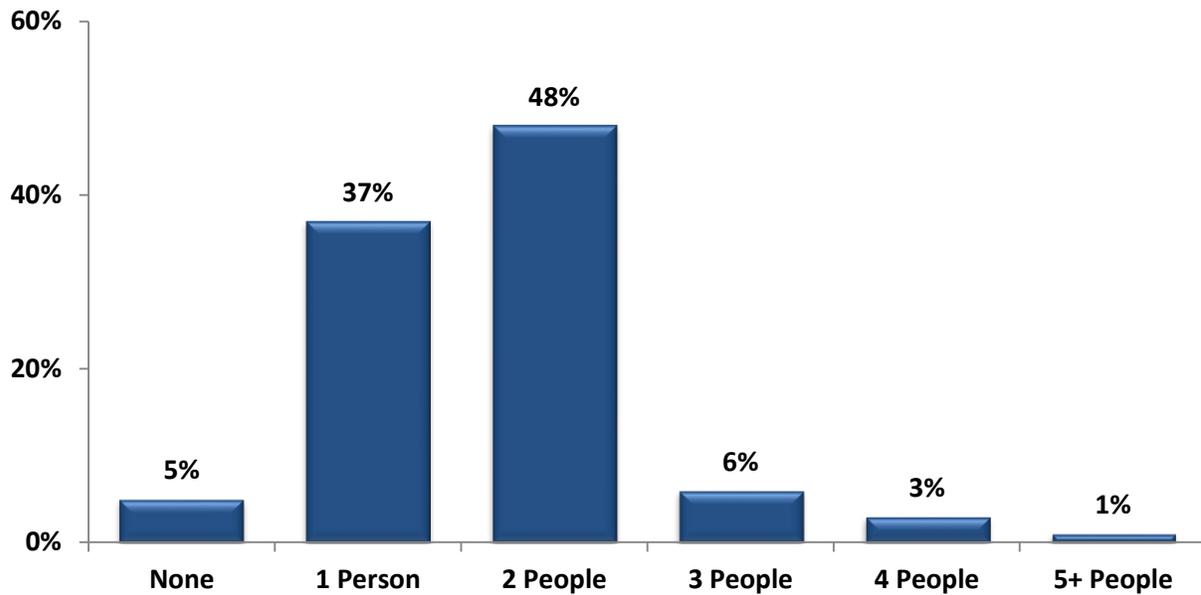


Over 90 percent of weekday Golden Gate Ferry riders are either employed, students, or both. Riders who only work make up the largest proportion, accounting for 87 percent of ridership. Two percent of Golden Gate Ferry riders are only students, and three percent are both employed and a student. Nine percent of weekday riders are neither employed nor students.<sup>5</sup>

As would be expected, riders with an income of \$50,000 or more are more likely to work (89%) than those with lower incomes (64%). Also, men (94%) are slightly more likely than women (85%) to work.

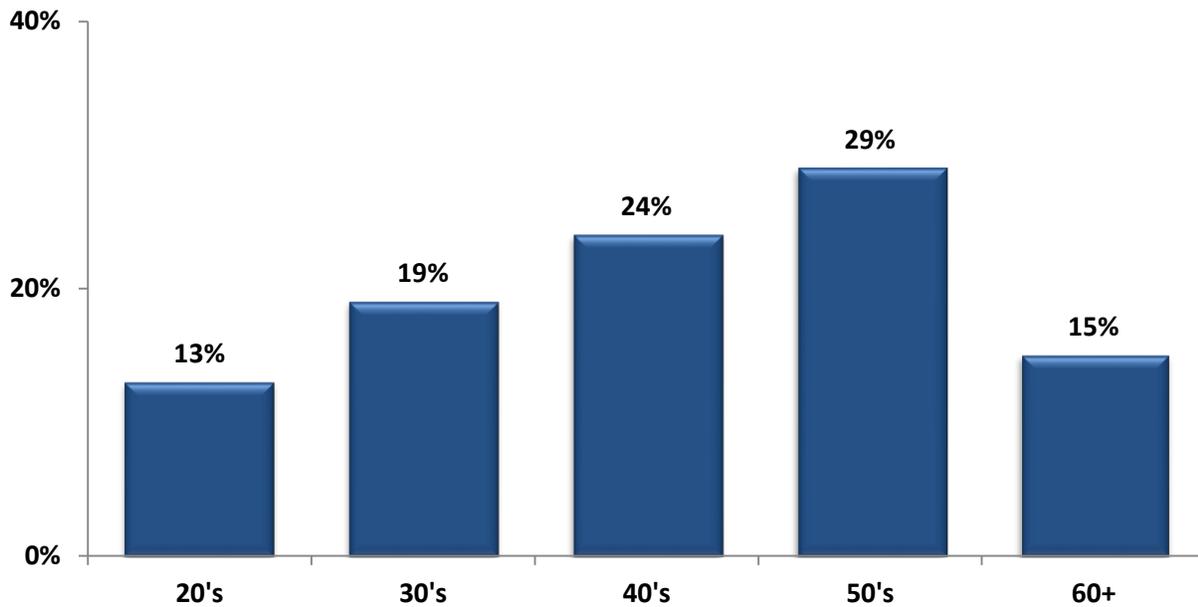
<sup>5</sup> Percentages do not add up to 100% due to rounding.

**Figure 18: How Many People Are Employed in Your Household?**  
n=373



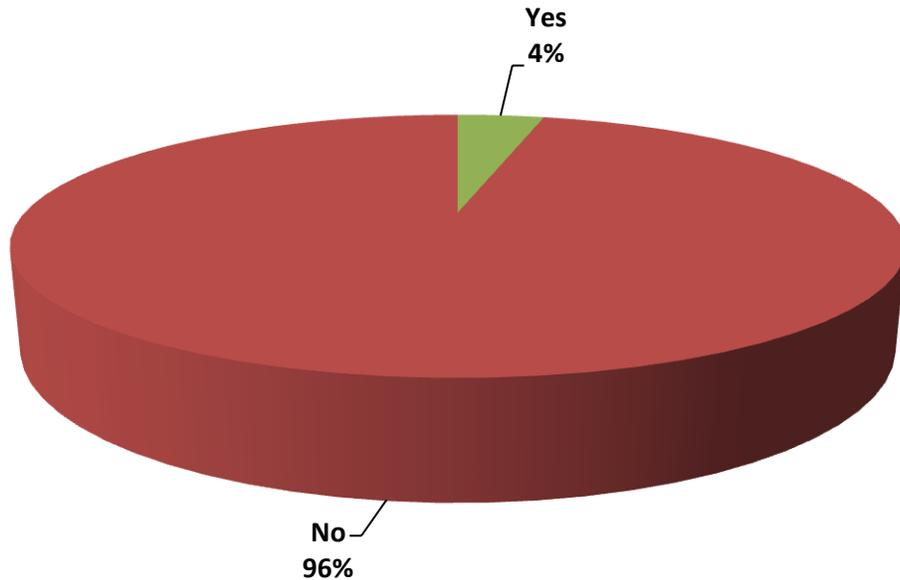
At 95 percent, almost all riders have at least one person employed in their household. Over one-third (37%) of weekday riders have one person in their household that works either full or part-time, almost half (48%) have two employed people in the household, and 10 percent have three or more employed people in the household. The average number of employed persons per household is 1.7.

**Figure 19: What Is Your Age Category?**  
n=365



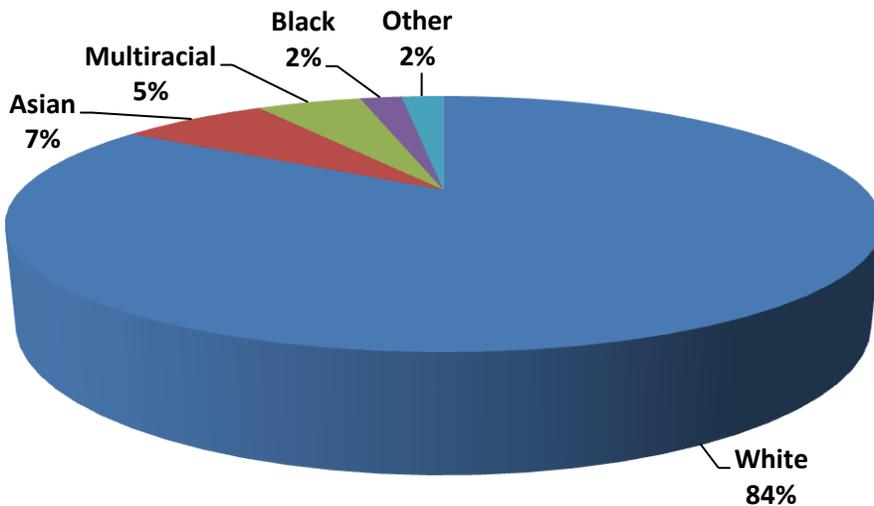
Golden Gate Ferry ridership skews older than bus ridership with the highest proportion of 29 percent in their 50's. This drops to 15 percent for those 60 or older, and also declines for each younger age group at 24 percent for riders in their 40's, 19 percent in their 30's and 13 percent in their 20's. Less than half of a percent of survey-eligible riders were under 20 years of age.

**Figure 20: Are You Hispanic, Latino or of Spanish Origin?**  
n=373



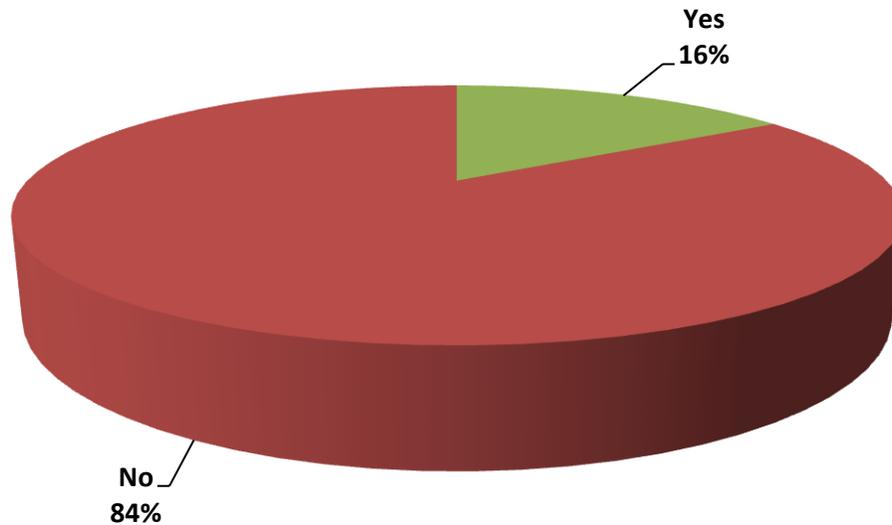
Only a small percentage (4%) identified themselves as Hispanic, Latino, or of Spanish origin.

**Figure 21: Which of the Following Do You Identify With?**  
n=363



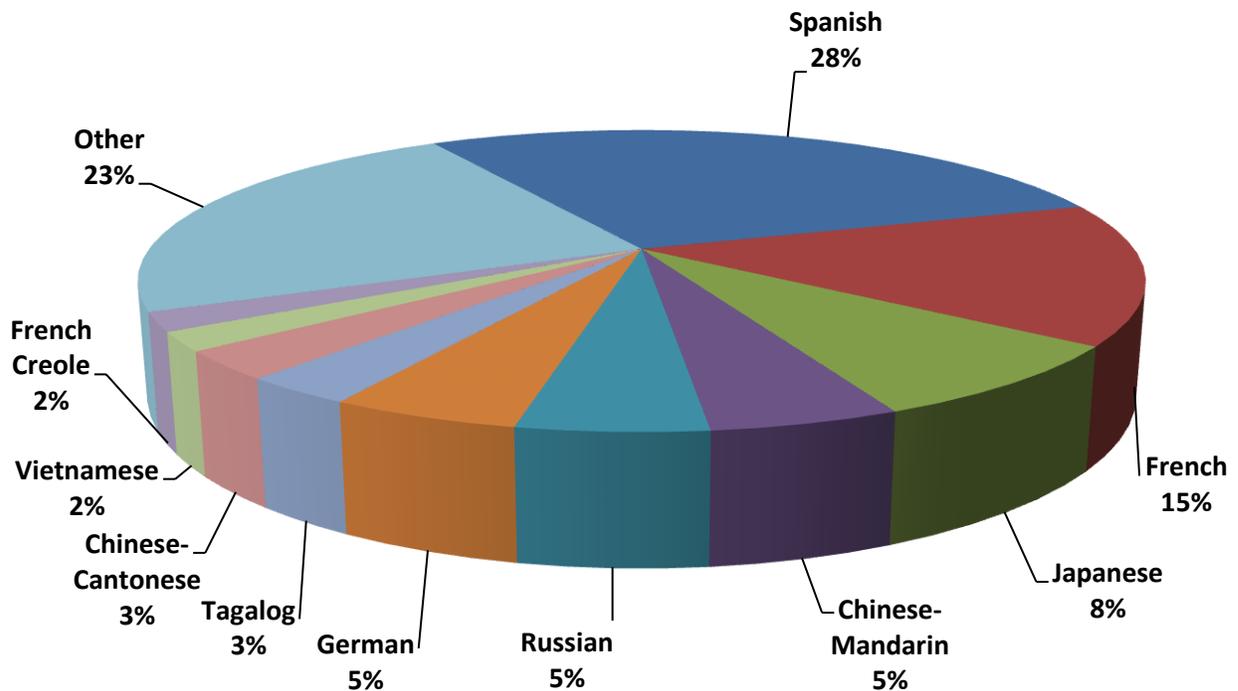
Weekday Golden Gate Ferry riders were asked to select the United States Census race category with which they identify. The largest proportion of Golden Gate Ferry riders who selected a discrete listed race category indicate they are White (84%). This is followed by Asian (7%) and Black (2%). Five percent of riders identify themselves as more than one race, and two percent of riders selected "Other" which consists primarily of "Hispanic," "Latino" or "Mexican."

**Figure 22: Do You Speak a Language Other Than English at Home?**  
n=374



Sixteen percent of Golden Gate Ferry riders speak a language other than English at home. Forty-two percent of riders who indicate they are Hispanic speak a language other than English at home. This is much higher than the 15 percent for those who indicate they are non-Hispanic.

**Figure 23: What Language Other Than English Do You Speak at Home?  
(Only Respondents Who Speak a Language Other Than English at Home)  
n=62**



Spanish is spoken by 28 percent of riders who speak a language other than English at home. The second most common discrete language spoken at home is French at 15 percent, followed by Japanese (8%), and Mandarin Chinese, Russian and German each at five percent. There are also a limited number of riders who speak Tagalog (3%), Cantonese Chinese (3%), Vietnamese (2%), and French Creole (2%). Twenty-three percent of riders speak “Other” languages not listed above, all of which are below two percent of those who do speak another language at home<sup>6</sup>.

It is useful to convert the language percentages from those who speak another language at home to the actual number of unique riders that speak another language at home. This is accomplished by first dividing the raw number for each language by the total number of boardings to get the percentage of all boardings. Then, since almost all riders ride round-trip, this is divided by two to secure the actual number of unique riders<sup>7</sup>.

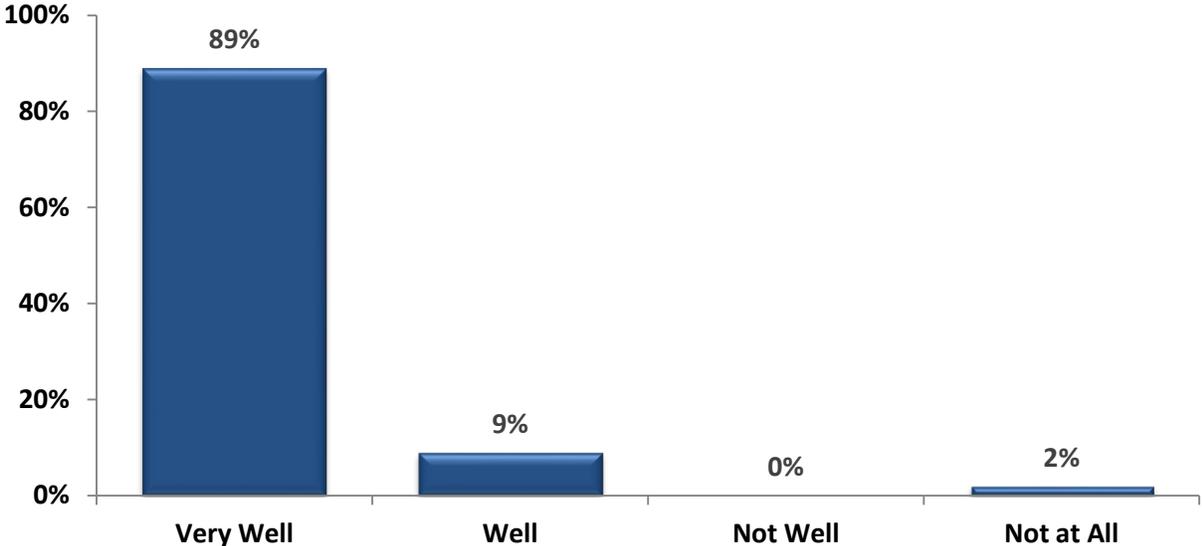
Based on this, the following results are presented three ways; first as a percentage of all boardings, second, as the actual number of boardings, and finally as the estimated number of unique riders by dividing by two. The percentages, boardings, and estimated unique

<sup>6</sup> Percentages do not add up to 100% due to rounding.

<sup>7</sup> Since it is not possible to take two ferries in a one-way trip it is not necessary to take transfers into consideration for this calculation.

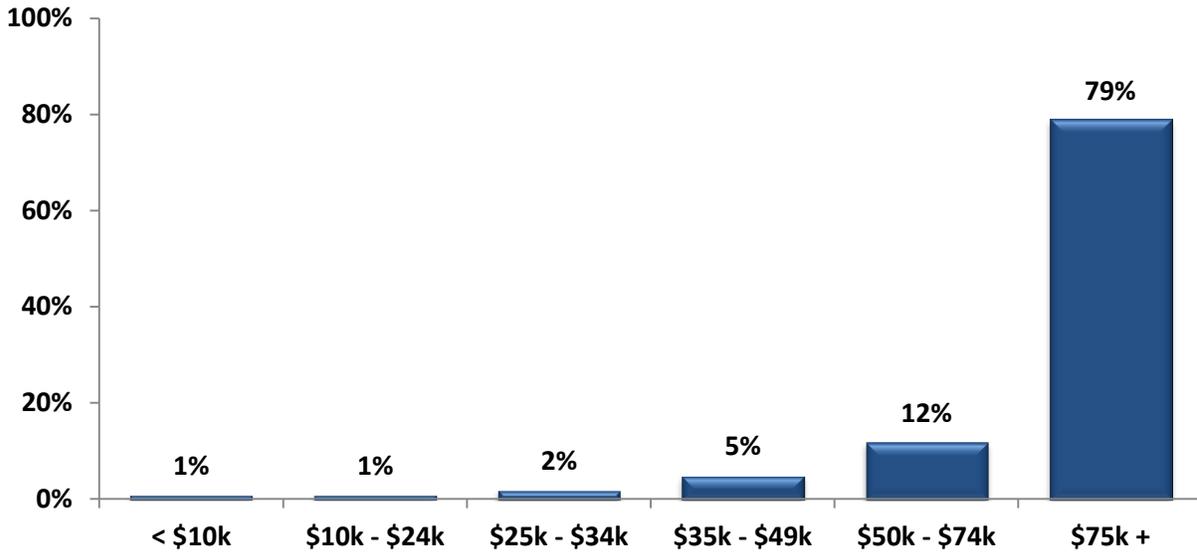
riders that speak languages other than English at home are: Spanish (5%, 315 boardings, 158 riders), French (2%, 167 boardings, 84 riders), Russian (1%, 58 boardings, 29 riders), Chinese Mandarin (1%, 57 boardings, 29 riders), Chinese-Cantonese (1%, 37 boardings, 19 riders) and Tagalog (1%, 36 boardings 18 riders).

**Figure 24: How Well Would You Say You Speak English?  
(Riders That Speak a Language Other Than English at Home)  
n=61**



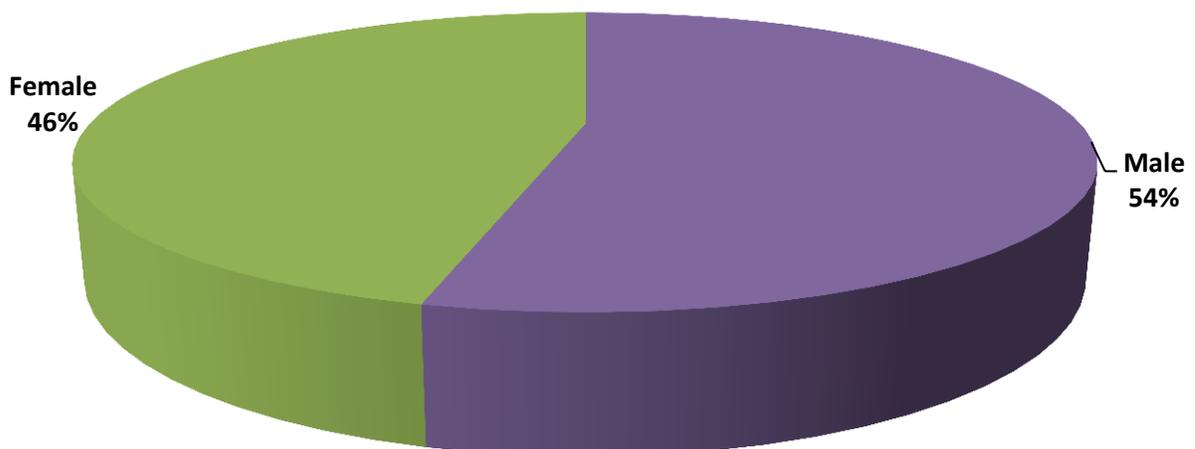
Of the Golden Gate Ferry riders who speak a language other than English at home, 89 percent indicate that they speak English “Very Well,” nine percent indicate that they speak it “Well,” and only two percent responded “Not Well” or “Not at All.” Using the same calculations as were used for individual languages above, this indicates that less than one percent of Golden Gate Ferry riders do not speak English at least “Well.”

**Figure 25: What is Your Total Household Income?**  
n=321



Household income for Golden Gate Ferry riders reflects the relative affluence of the community served with almost four out of five (79%) earning \$75,000 or more per year. This drops to 12 percent in the \$50,000 to \$74,999 category, five percent in the \$35,000 to \$49,999 range, two percent for \$25,000 to \$34,000, and one percent each for \$10,000 to \$24,999 and under \$10,000.

**Figure 26: Gender**  
n=374



Golden Gate Ferry weekday ridership has slightly more male riders (54%) than female riders (46%).

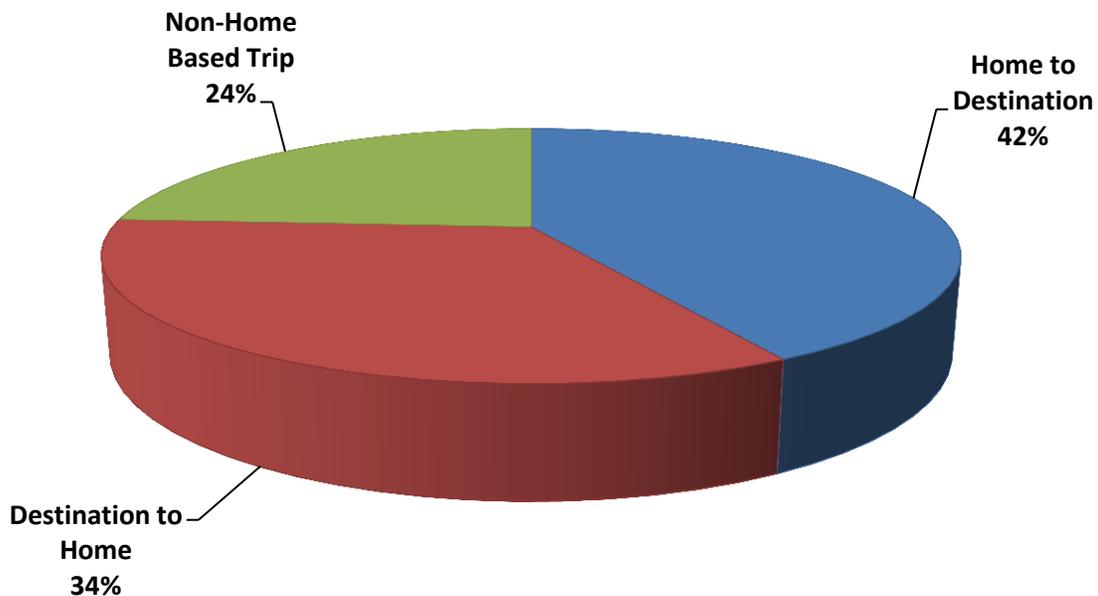
# GOLDEN GATE FERRY WEEKEND RIDERSHIP

Golden Gate Ferry weekend riders were surveyed on the Larkspur and Sausalito Ferries, traveling in both route directions. A total of 181 surveys were completed for riders traveling between the hours of 6:00 AM and 7:00 PM, exceeding the target of 172. The surveys were distributed in proportion to the distribution of Saturday and Sunday boardings.

## WEEKEND TRIP CHARACTERISTICS

Three quarters of weekend trips (76%) include “Home” as either the origin or the destination of their transit trip with the remaining 24 percent being trips that are neither coming from nor going to home. Twice as many weekend trips (24%) as weekday trips (12%) are non-home based.

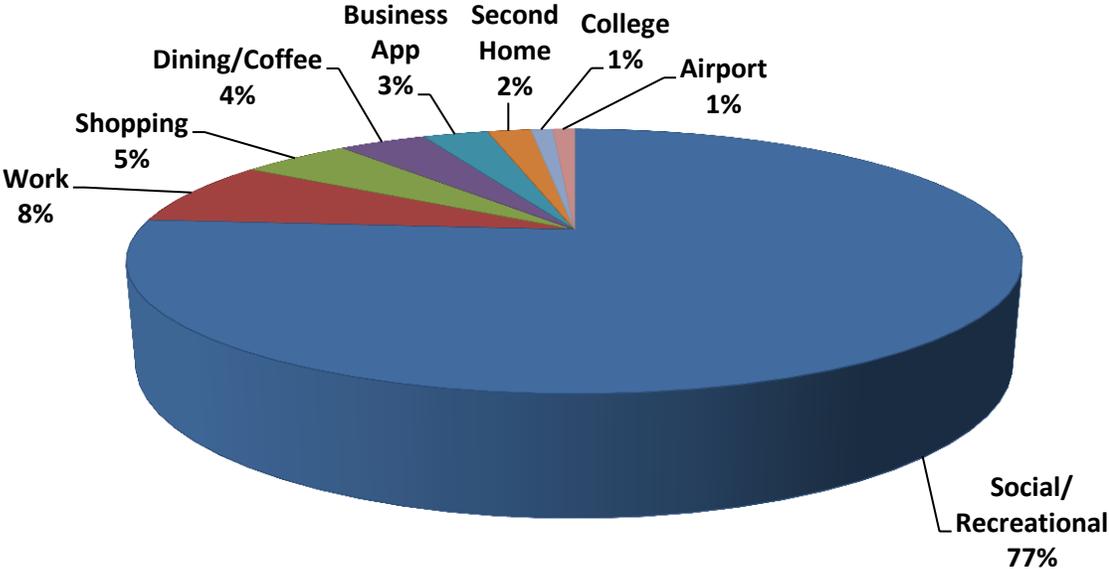
**Figure 27: Weekend – Is Home Your Origin or Destination?**  
n=181



In the same fashion as the Golden Gate Ferry weekday ridership sample, all surveys are initially collected regardless of trip direction or purpose which produces a database that is a combination of trips both from home and to home. To create a more meaningful representation of riders’ trips, survey results are presented from a modified database of

trips in relation to rider’s homes. This approach creates a clearer picture of first boarding point accessibility to riders’ ultimate origin as well as the relationship between their last alighting point to their final destination. This approach provides a consistent picture of all outbound trips to create a more meaningful and actionable picture of rider behavior.

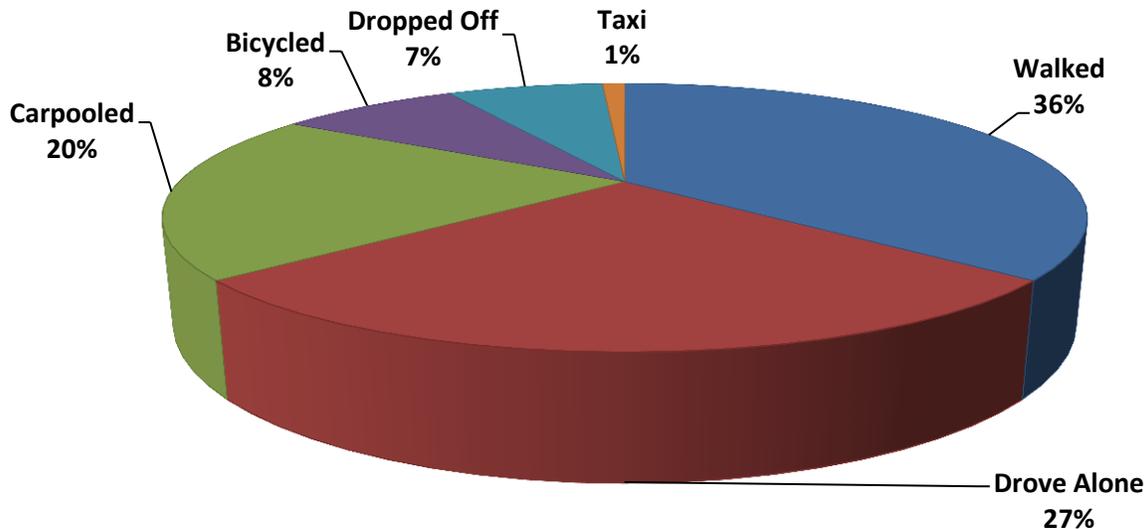
**Figure 28: Weekend – What Is Your Home-Based Trip Purpose?**  
**n=140**



Using this home-based database, weekend riders’ trips are predominantly directed to “Social/Recreation” at 77 percent as opposed to the weekday home-based trips where the majority is “Work” (78%). Weekend “Work” and “Business Appointment” trips account for 11 percent while “Shopping” and “Dining/Coffee” account for five and four percent respectively. This is followed by “Second Home” (2%), “College” (1%), and “Airport” (1%).<sup>8</sup>

<sup>8</sup> Percentages do not add up to 100% due to rounding.

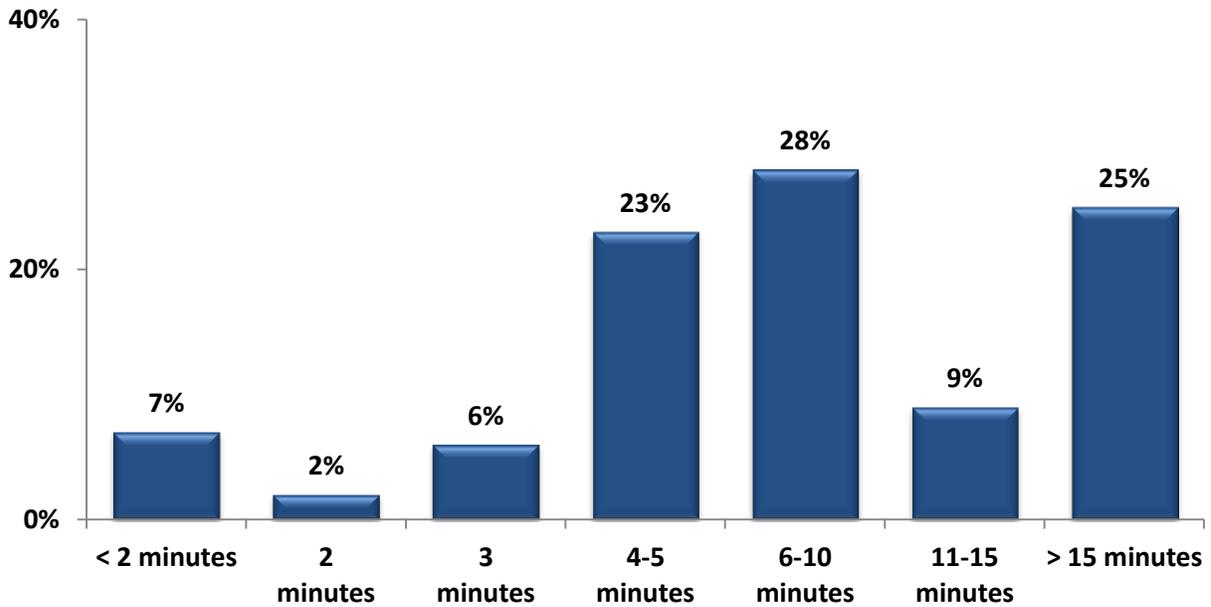
**Figure 29: Weekend – How Do You Get From Your Home To Your First Boarding Point?**  
n=140



Access modes for weekend ferry travel are significantly different than for weekday travel. The most common access mode is “Walking” which comprises over a third (36%) of ridership, twice as much as for weekdays (18%). The second most common access mode is “Driving Alone” which at 27 percent is less than half of the 66 percent for weekday level. At 20 percent, “Carpooling” is less frequent, but four times higher than the weekdays where it is five percent. Other access modes include “Bicycle” (8%), “Dropped-Off” (7%), and “Taxi” (1%) which are all similar to weekday levels.<sup>9</sup>

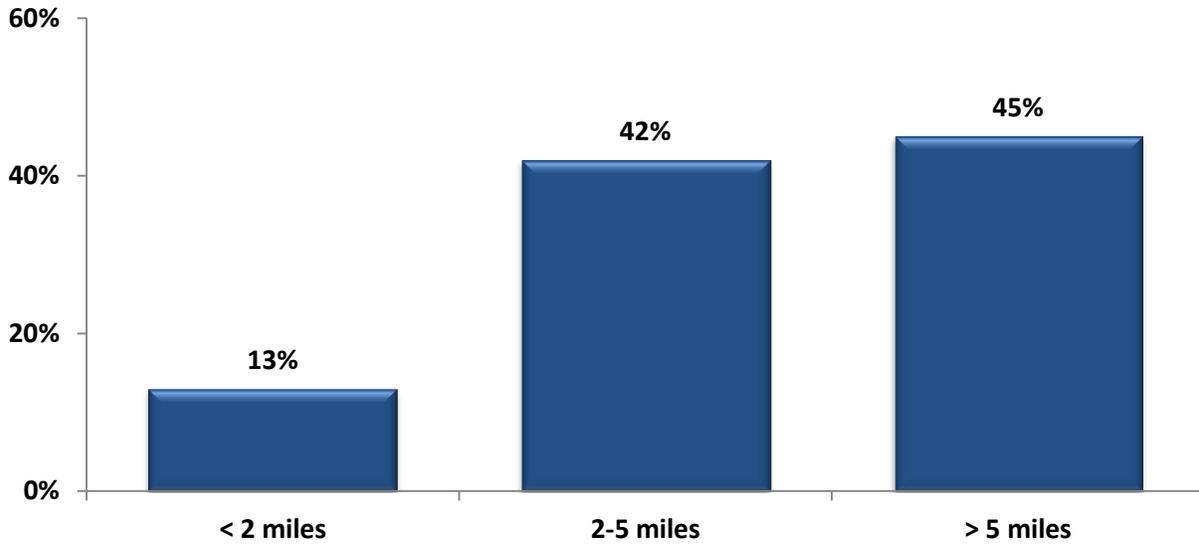
<sup>9</sup> Percentages do not add up to 100% due to rounding.

**Figure 30: Weekend – How Many Minutes Is Your Walk From Home To Your First Boarding Point?**  
n=47



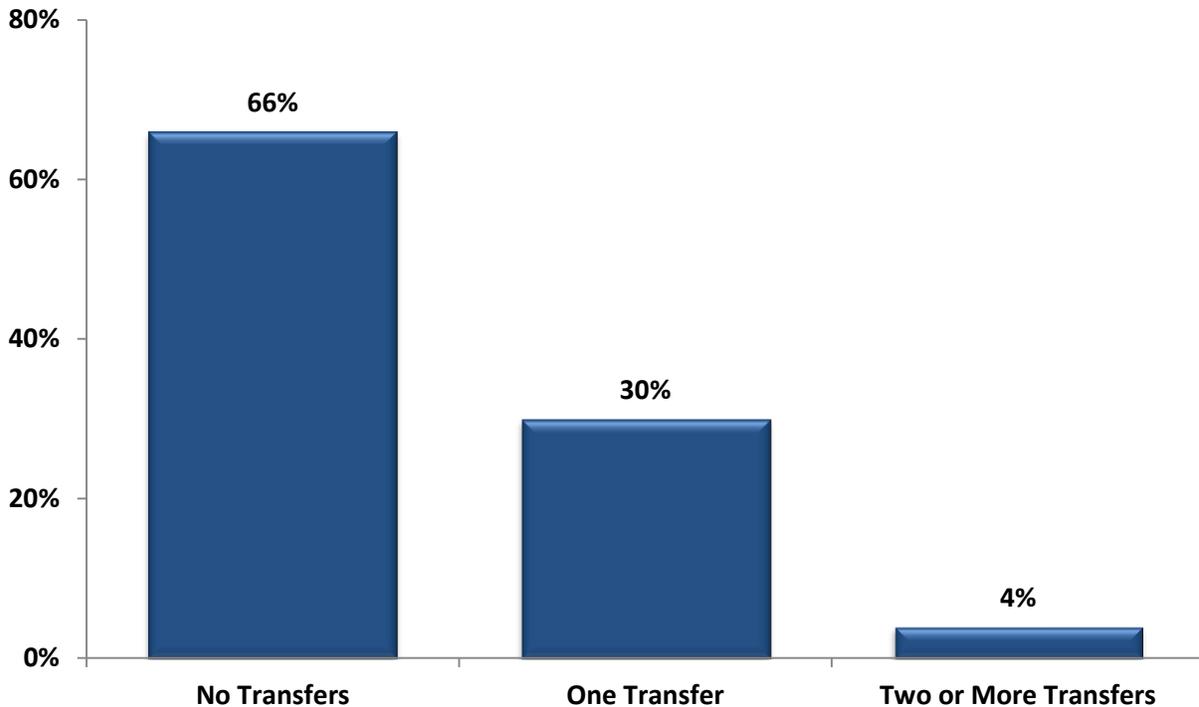
For the 36 percent of weekend trips made by riders who walk from home to their first boarding point, 38 percent walk five or fewer minutes. Within this group, 15 percent walk three or fewer minutes. The most common walk time is between six to ten minutes (28%). At the higher end of the distribution, 34 percent of riders report a walk time of 11 minutes or more. The overall average walk time from home to the first boarding point is higher for weekend trips at 13.1 minutes compared to 10.3 minutes during the week.

**Figure 31: Weekend – How Many Miles Is It From Your Home To Your First Boarding Point? (Non-Walkers Only)**  
n=91



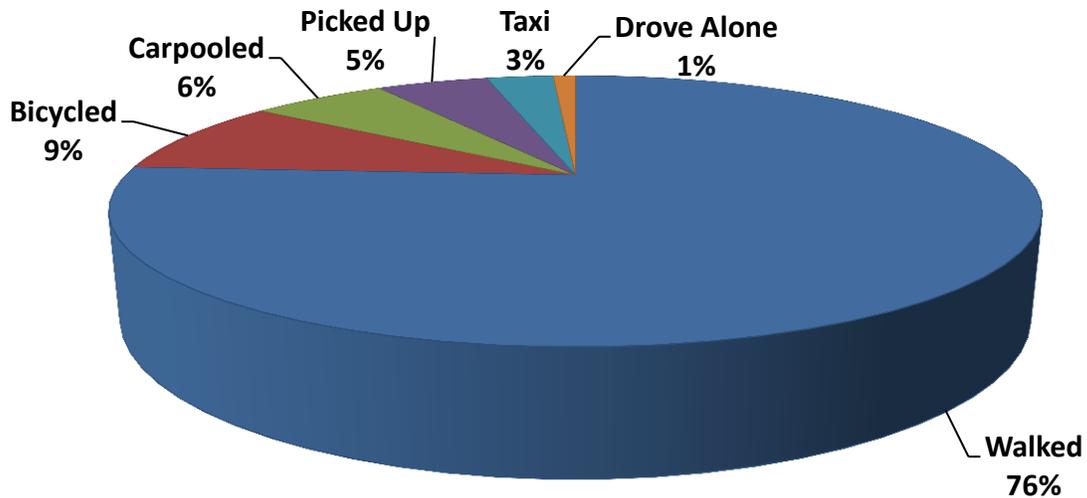
Among the 64 percent of weekend riders who access their first boarding point by a mode other than walking, over half travel five miles or less (55%) which is similar to the weekday pattern (57%). This figure is split between riders who travel less than two miles (13%), and those who travel two to five miles (42%). The average distance traveled from home to the first boarding point is 13.7 miles which is higher than the weekday average of 9.0 miles.

**Figure 32: Weekend – How Many Transfers Are Needed To Complete Your Trip?**  
n=181



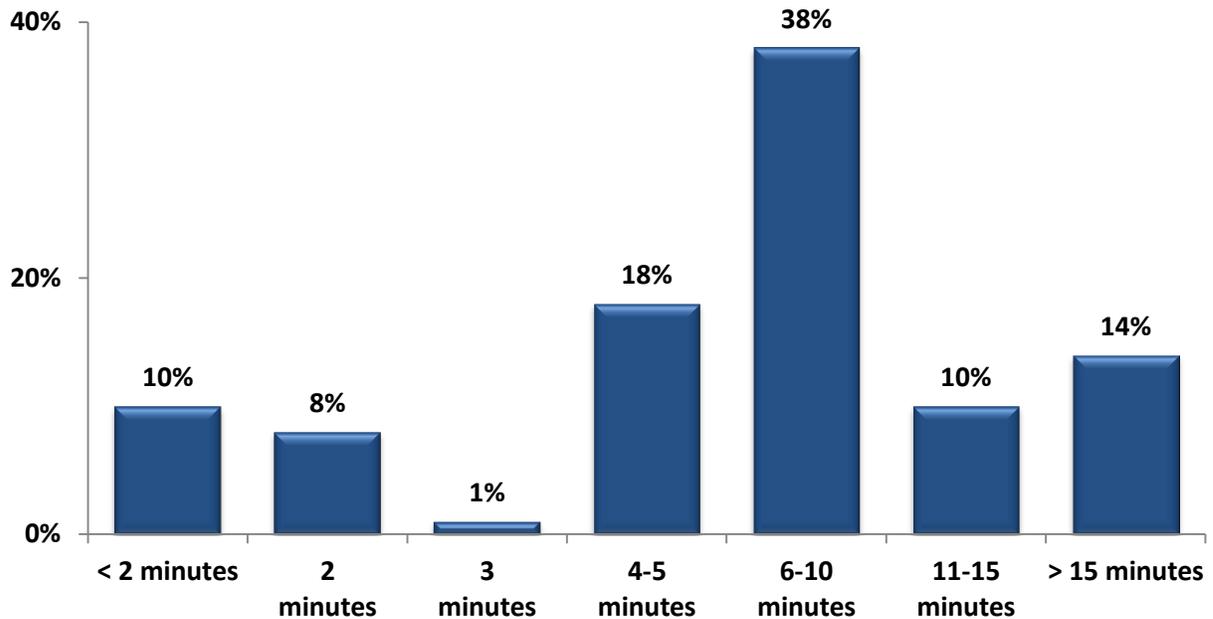
Almost two-thirds of weekend riders (66%) complete their transit trip without transferring. This is substantially lower than the 84 percent for weekday riders. One-third of weekend riders (30%) complete their trip with one transfer, which is twice as high as the 15 percent for weekday trips, and four percent require two or more transfers. The average number of weekend transfers is 0.4 which is equivalent to 1.4 trip segments, higher than the weekday average of 1.2.

**Figure 33: Weekend – How Do You Get From Your Last Stop To Your Non-Home Destination?**  
n=140



On weekend trips, there are fewer riders who “Walk” to reach their non-home destination from their last transit stop (76% vs. 87%). In contrast, riders who use “Carpool” and those who are being “Picked-Up” are higher than weekdays at six and five percent respectively compared to one percent each. Other egress modes such as “Bicycle” (9%) and “Taxi” (3%) are similar to the weekday results.

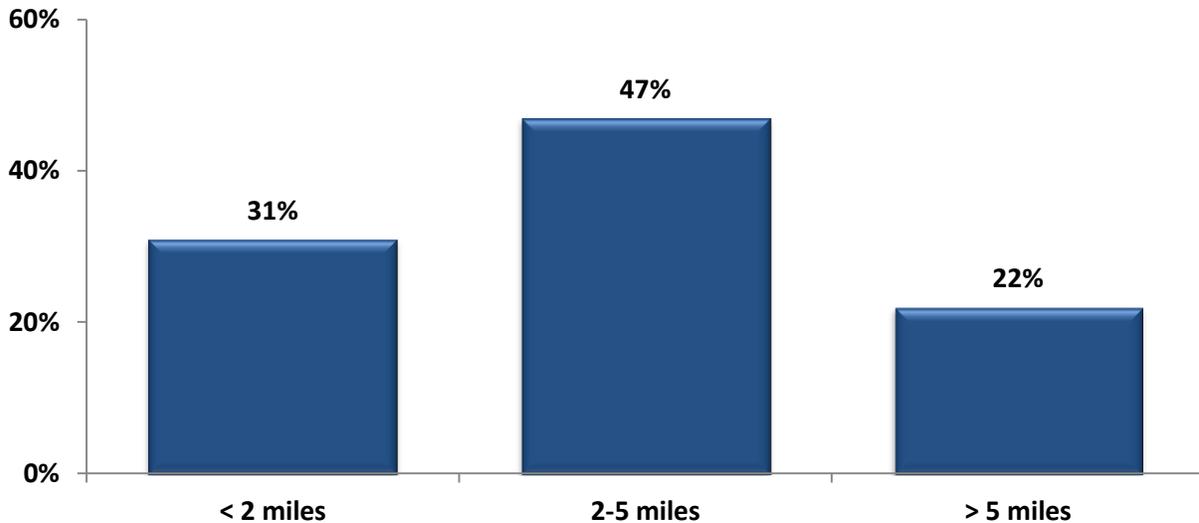
**Figure 34: Weekend – How Many Minutes Is Your Walk From Your Last Stop To Your Non-Home Destination?**  
n=105



Over one-third (37%) of weekend riders who walk to their non-home destination from their last transit stop have a walk time of five minutes or less, which is higher than the weekday percentage of 24 percent. However, similar to the weekday ridership the most common walk time is six to 10 minutes (38% weekend vs. 39% weekday). The remaining one-quarter (24%) of weekend riders walk for more than 10 minutes.<sup>10</sup> The average walk time is similar for weekend and weekday ridership at 11.7 and 10.7 minutes, respectively.

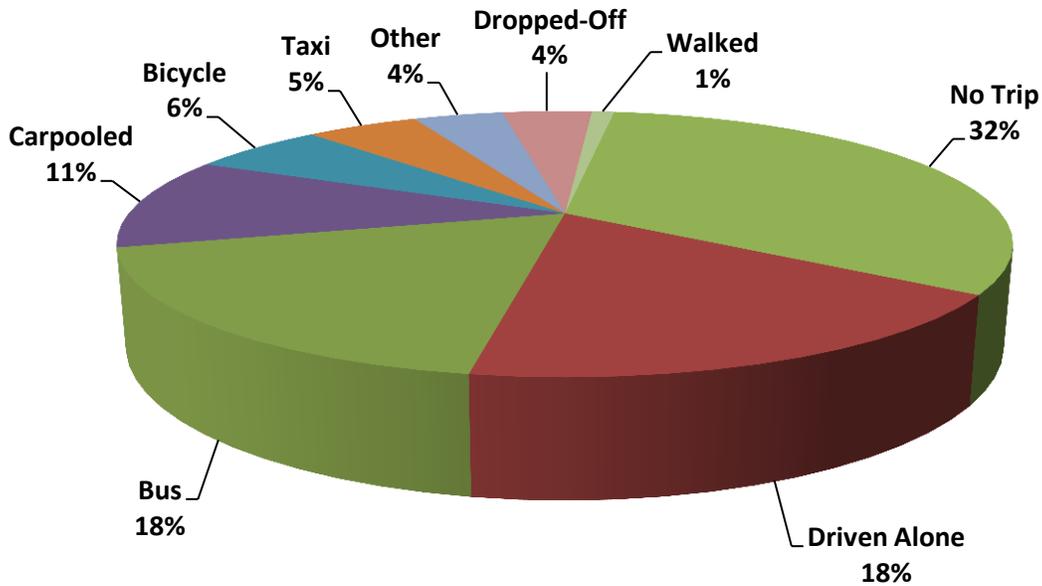
<sup>10</sup> Percentages do not add up to 100% due to rounding.

**Figure 35: Weekend – How Many Miles Is It From Your Last Stop To Your Non-Home Destination? (Non-Walkers)**  
n=34



For the 24 percent of riders who do not walk from their last stop, 31 percent of riders travel less than two miles while 47 percent travel between two to five miles to reach their final destination. Only 22 percent of riders travel more than five miles to their non-home destination. In comparison to the weekday, weekend riders tend to travel a longer distance from their last stop to the final destination. On the weekday 53 percent of riders travel two miles or more, this is less than the 69 percent for weekend riders. Moreover, the average distance traveled on the weekend is 5.7 miles as opposed to the average of 4.4 miles on the weekday.

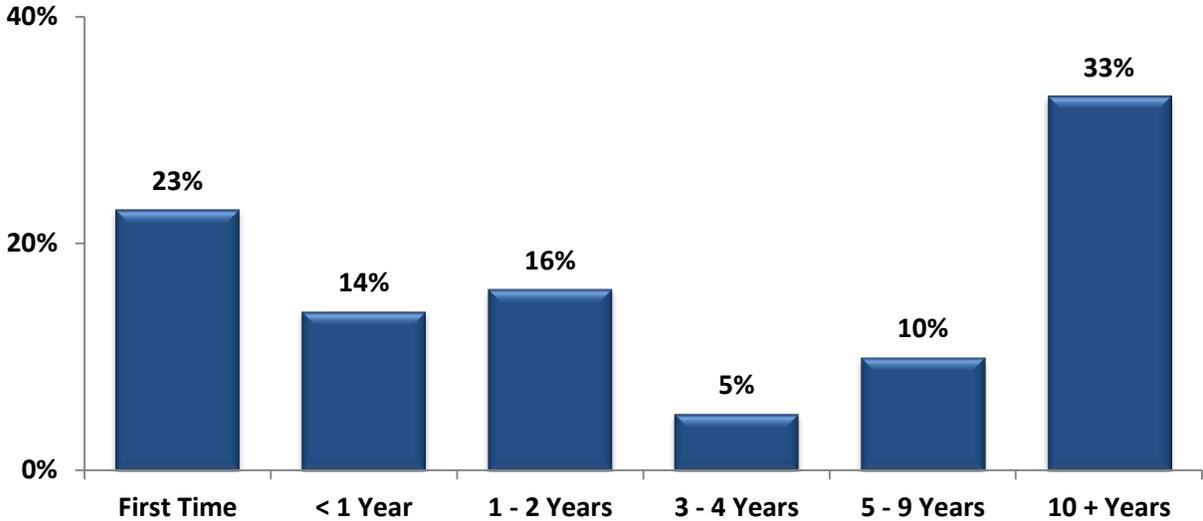
**Figure 36: Weekend – If the Golden Gate Ferry Was Not Available, How Would You Have Made Your Trip?  
n=181**



There are several significant differences between weekday and weekend riders in terms of their choice for alternative travel modes if the Golden Gate Ferry they rode was unavailable. On the weekend, one-third (32%) of riders would have not made their trip if the ferry were unavailable compared to only nine percent for weekday riders. Conversely, the proportion of weekend riders who would have driven alone (18%) is much smaller than the proportion on the weekday (40%). A substantial difference is also observed among riders who would have taken a bus for their travel needs (18% weekend vs. 37% weekday). The majority of “Other” responses on the weekend were riders who said “don’t know”<sup>11</sup>.

<sup>11</sup> Percentages do not add up to 100% due to rounding.

**Figure 37: Weekend – How Long Have You Been Riding Golden Gate Ferries?  
n=181**

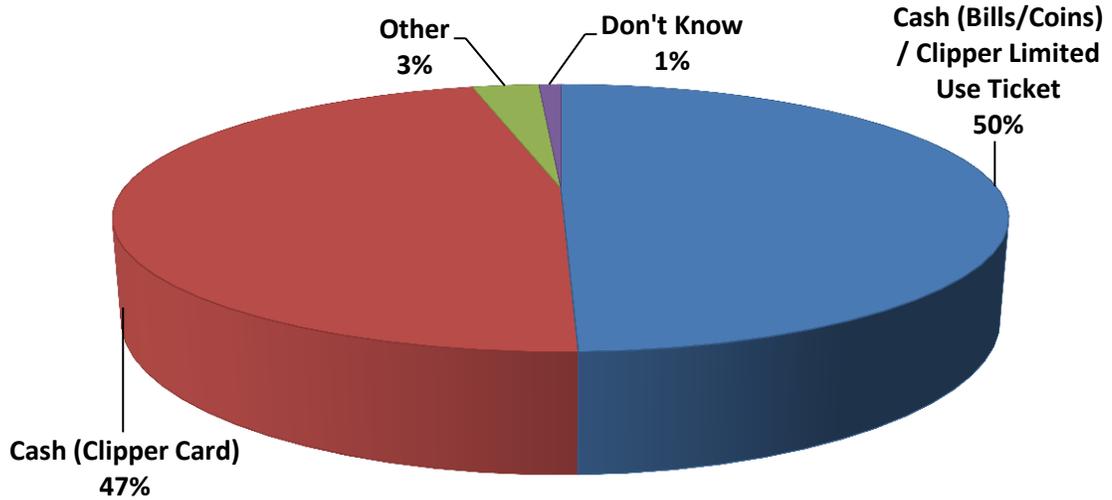


The proportion of weekend riders who have been using the ferry for ten years or more is similar to the weekday ridership at 33% and 32%, respectively. In contrast, the percentage of first-time weekend riders is almost three times as high at 23 percent compared to eight percent for weekdays<sup>12</sup>. The median longevity of weekend ridership is 2.6 years, significantly less than the weekday median of 4.1.

<sup>12</sup> Percentages do not add up to 100% due to rounding.

## WEEKEND FARE MEDIA

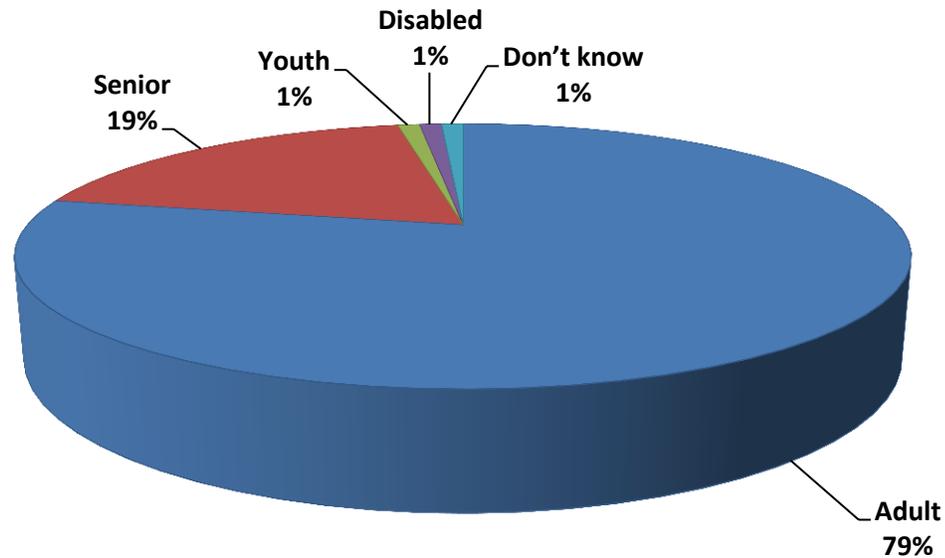
**Figure 38: Weekend – How Do You Pay For Your Ferry Fare?  
n=181**



Similar to the weekday distribution (98%), the majority of weekend Golden Gate ferry riders (97%) use cash to pay their transit fare. The type of cash payment, however, is different on the weekend with one half (50%) of riders using bills/coins to purchase a Clipper limited use ticket, and half (47%) using cash on a Clipper Card. In comparison, on the weekday, the use of bills/coins and cash on a Clipper Card account for 17 and 81 percent, respectively. “Other” non-cash payment (3%) generally consists of ferry tickets that were included in a tour package.<sup>13</sup>

<sup>13</sup> Percentages do not add up to 100% due to rounding.

**Figure 39: Weekend – What Type of Fare Do You Pay?**  
n=181

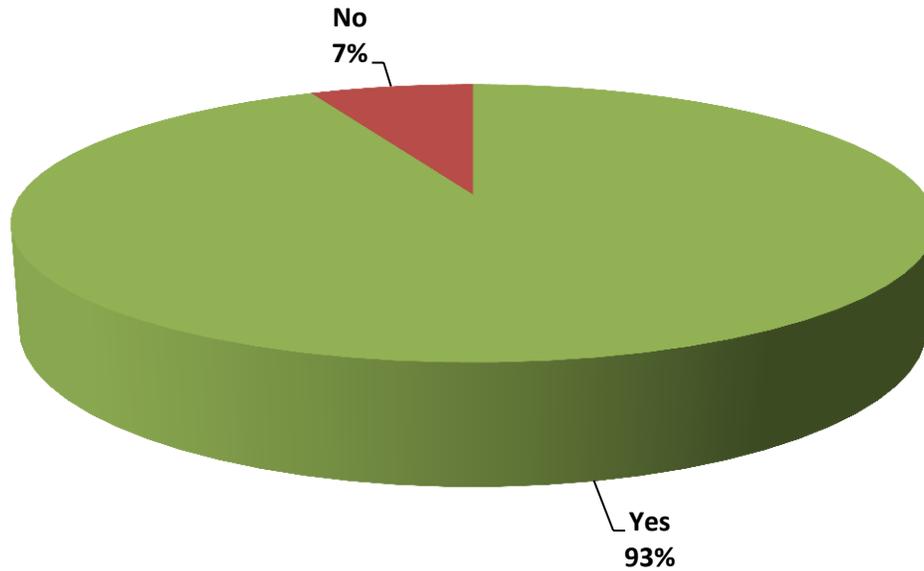


The majority of Golden Gate Ferry weekend riders (79%) pay the full “Adult” fare price. A discounted fare type is paid by 21% of weekend riders, including those who paid a “Senior” (19%), “Youth” (1%), or “Disabled” fare (1%).<sup>14</sup> Weekday ridership shows higher proportion of “Adult” fares (91%) but lower proportion of “Senior” fares (9%).

<sup>14</sup> Percentages do not add up to 100% due to rounding.

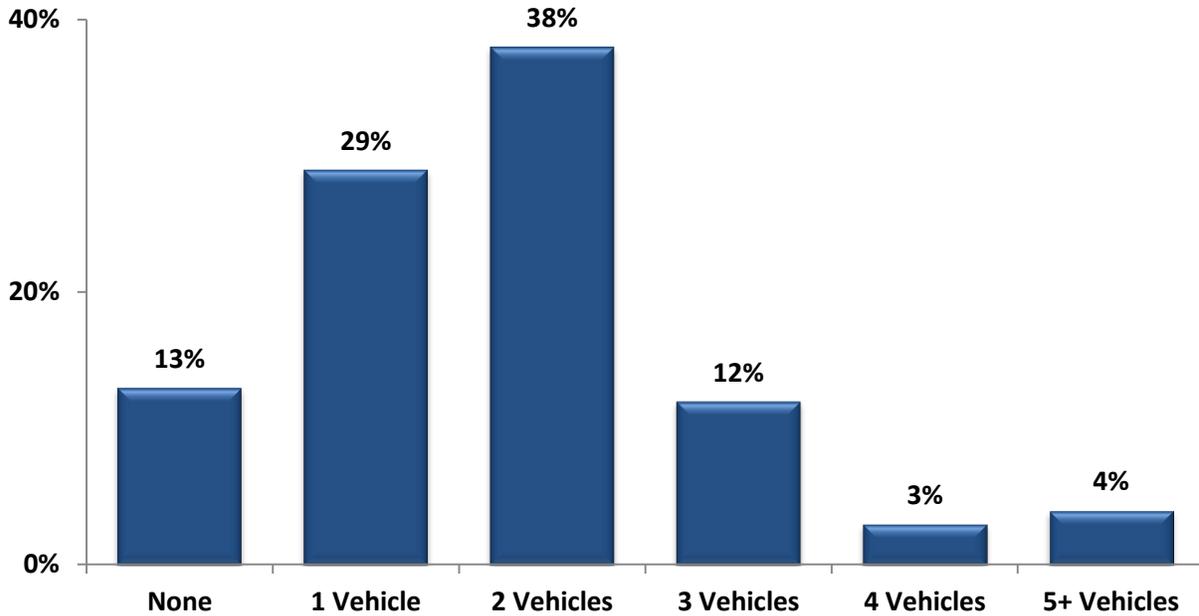
## WEEKEND TRANSPORTATION DEMOGRAPHICS

Figure 40: Weekend – Do You Currently Have a Driver’s License?  
n=181



Weekend riders have a slightly higher percentage than weekday riders (7% vs. 3%) that do not have a driver's license, and thus are transit dependent.

**Figure 41: Weekend – How Many Drivable Vehicles Are Available To Your Household?**  
n=181



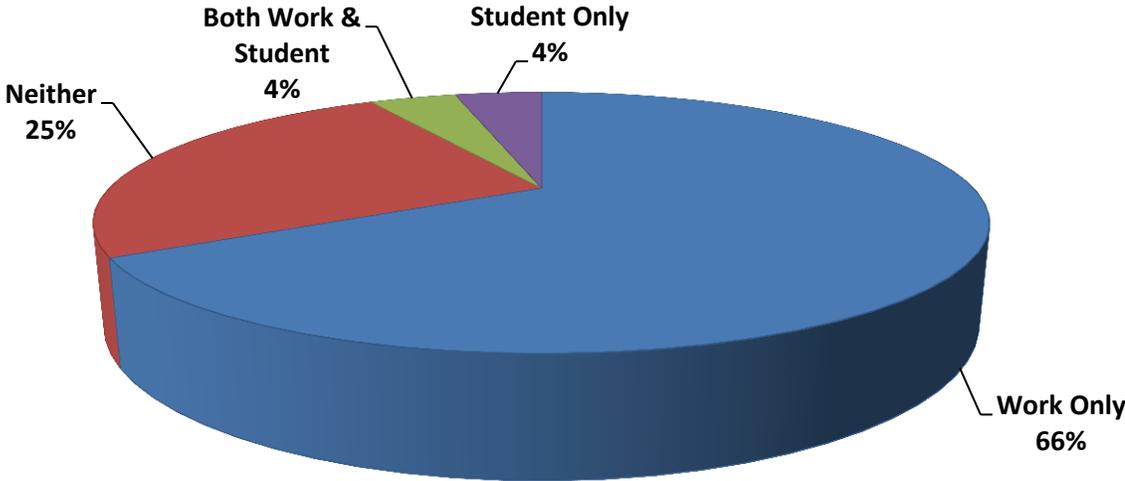
At 13 percent, weekend riders are more likely than weekday riders (3%) to not have a drivable vehicle available to their household. Vehicle availability among weekend riders starts at 29 percent with one vehicle, increases to 38 percent for those who have two vehicles, 12 percent for three vehicles, and seven percent for those with four or more vehicles.<sup>15</sup>

The overall average number of drivable vehicles per household is 1.8 for weekend riders, slightly lower than average for weekday riders of 2.1.

<sup>15</sup> Percentages do not add up to 100% due to rounding.

# WEEKEND RIDER DEMOGRAPHICS

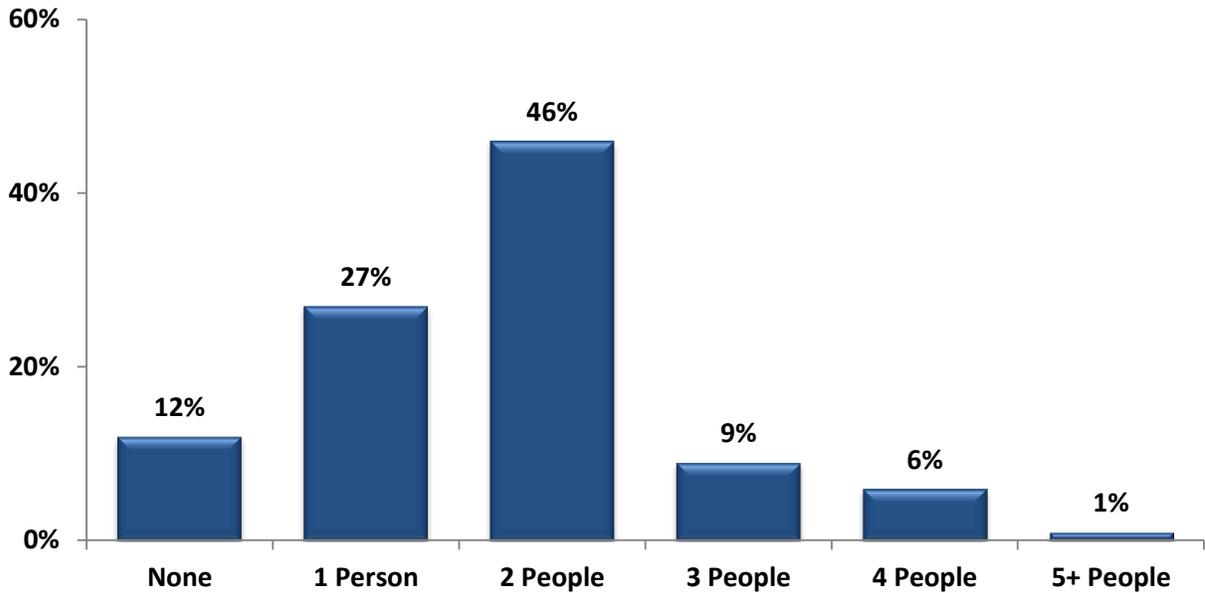
Figure 42: Weekend – Are You Currently Employed and/or a Student?  
n=181



As might be expected, the proportion of weekend riders who work (70%) is lower than for weekday riders (90%). Conversely, 25 percent of weekend riders are neither workers nor students, compared to nine percent during the weekday.<sup>16</sup>

<sup>16</sup> Percentages do not add up to 100% due to rounding.

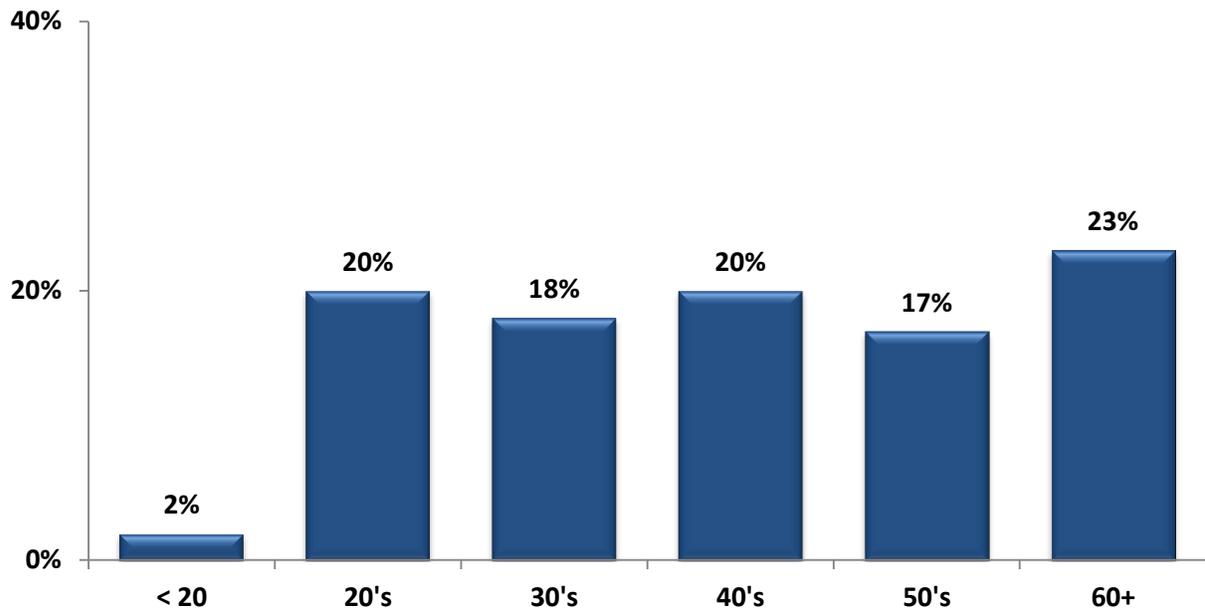
**Figure 43: Weekend – How Many People Are Employed in Your Household?**  
n=181



Weekend riders are more than twice as likely to live in a household where no one is employed (12%) than weekday riders (5%). Approximately a quarter (27%) of weekend riders have one worker in the household, about half (46%) have two workers in their household, and 16 percent have three or more workers.<sup>21</sup> The average number of employed persons per household is 1.7, matching the weekday average.

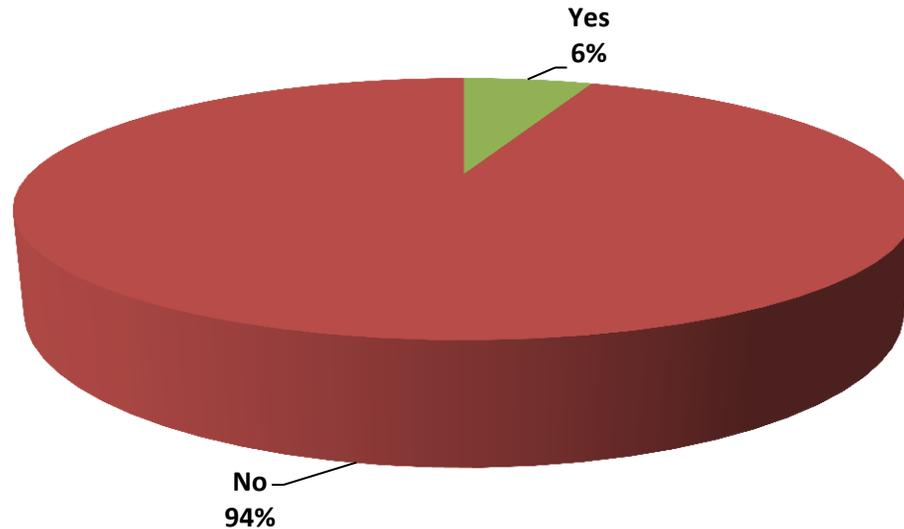
<sup>21</sup> Percentages do not add up to 100% due to rounding.

**Figure 44: Weekend – What Is Your Age Category?**  
n=177



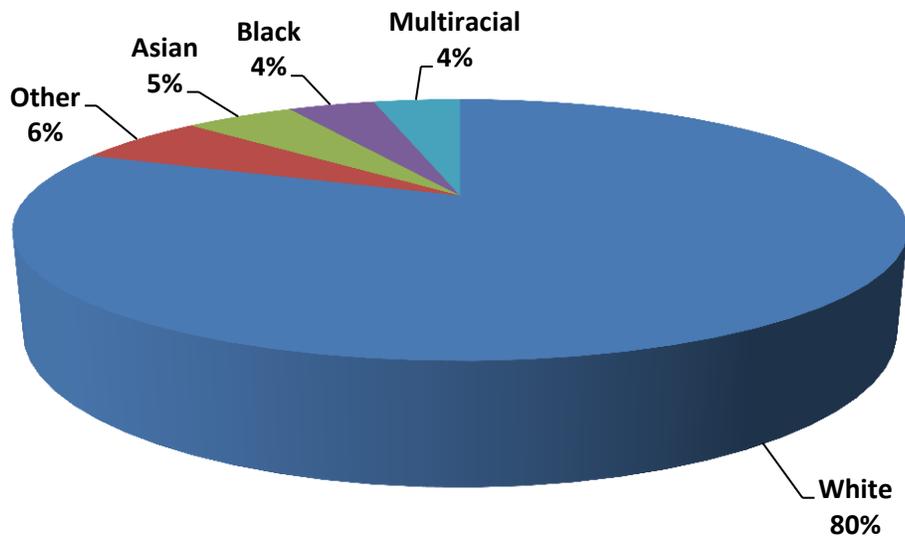
The age distribution among weekend riders is more evenly distributed than for weekday riders. A small percentage of weekend riders are under 20-years old (2%) compared to less than half of a percent on weekdays. All other age categories from the 20's through 60 or older are between 17 and 23 percent. At 20 percent weekend riders in their 20's is seven percent higher than in the weekday, and at 23 percent riders 60 or older is eight percent higher. Conversely, riders in their 50's is twelve points lower at 17 percent compared to 29 percent for weekdays.

**Figure 45: Weekend – Are You Hispanic, Latino or of Spanish Origin?**  
n=181



The proportion of Hispanic riders on the weekend is similar to weekday riders at six and four percent respectively.

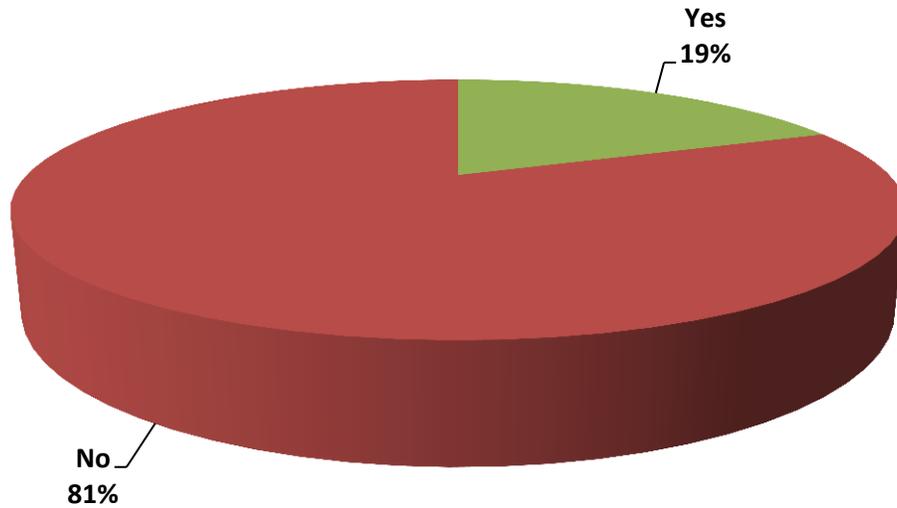
**Figure 46: Weekend – Which of the Following do You Identify With?**  
n=178



Weekend riders were asked to identify which Census race category with which they identify. The distribution is similar to the weekday, with the largest proportion of riders being White (80%). Followed by those who identified themselves as Asian (5%), Black (4%), and Multi-racial (4%).<sup>17</sup> The “Other” ethnic category accounts for six percent and mainly consists of those who identify themselves as “Hispanic.”

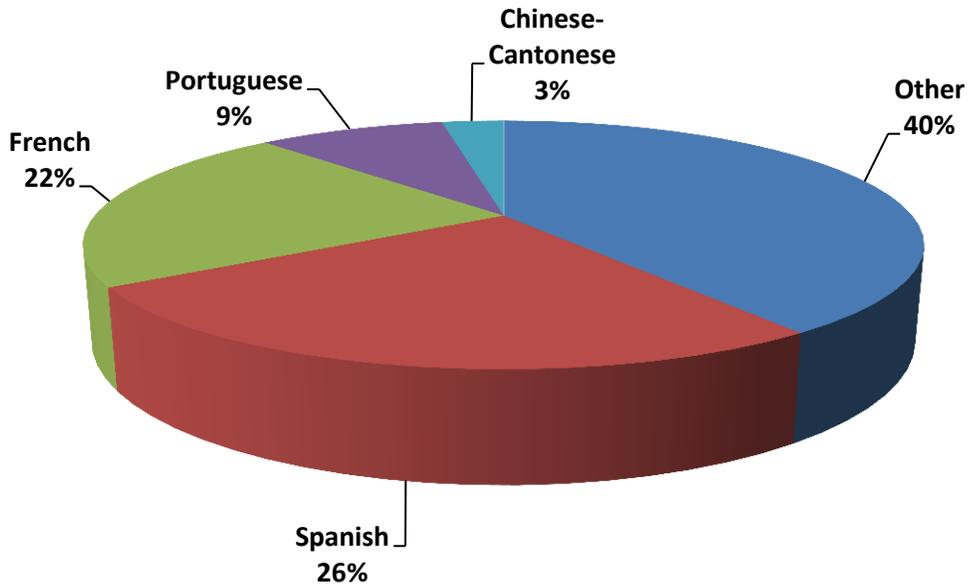
<sup>17</sup> Percentages do not add up to 100% due to rounding.

**Figure 47: Weekend – Do You Speak a Language Other Than English at Home?  
n=109**



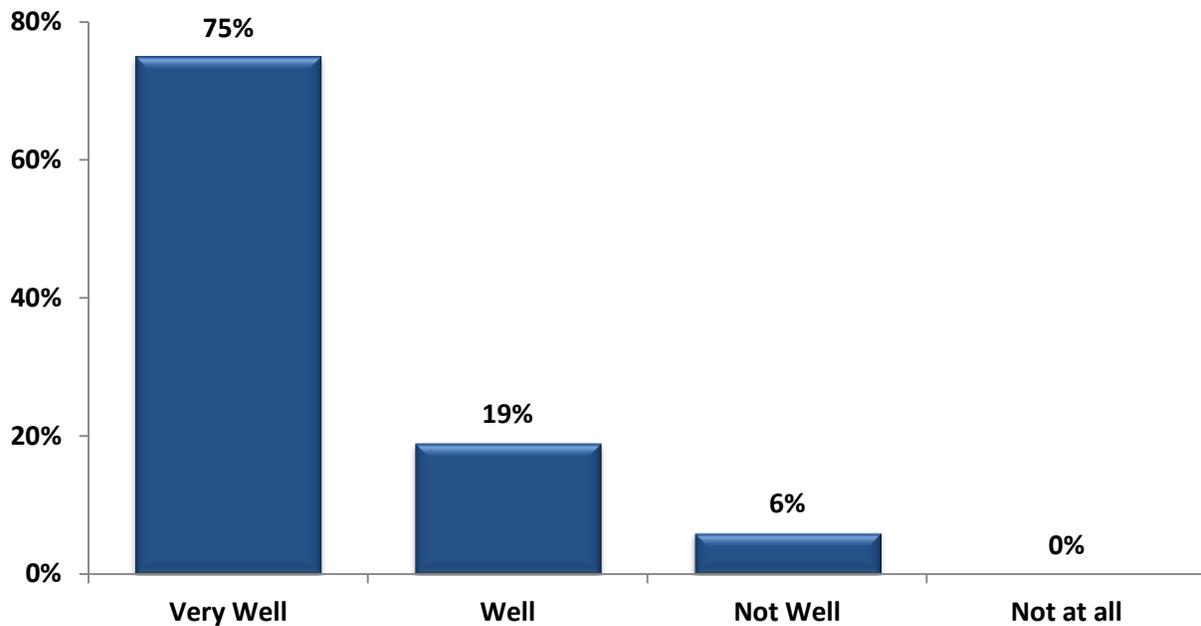
The distribution of weekend riders who speak a language other than English at home is similar to the weekday riders at 19 percent and 17 percent respectively.

**Figure 48: Weekend – What Language Other Than English Do You Speak at Home?  
(Only Respondents Who Speak a Language Other Than English at Home)  
n=34**



Similar to weekday, Spanish is the most common language spoken at home by weekend riders who speak a language other than English at home (28% Weekday vs. 26% Weekend). The second most common language spoken at home is French (22%) followed by Portuguese (9%).

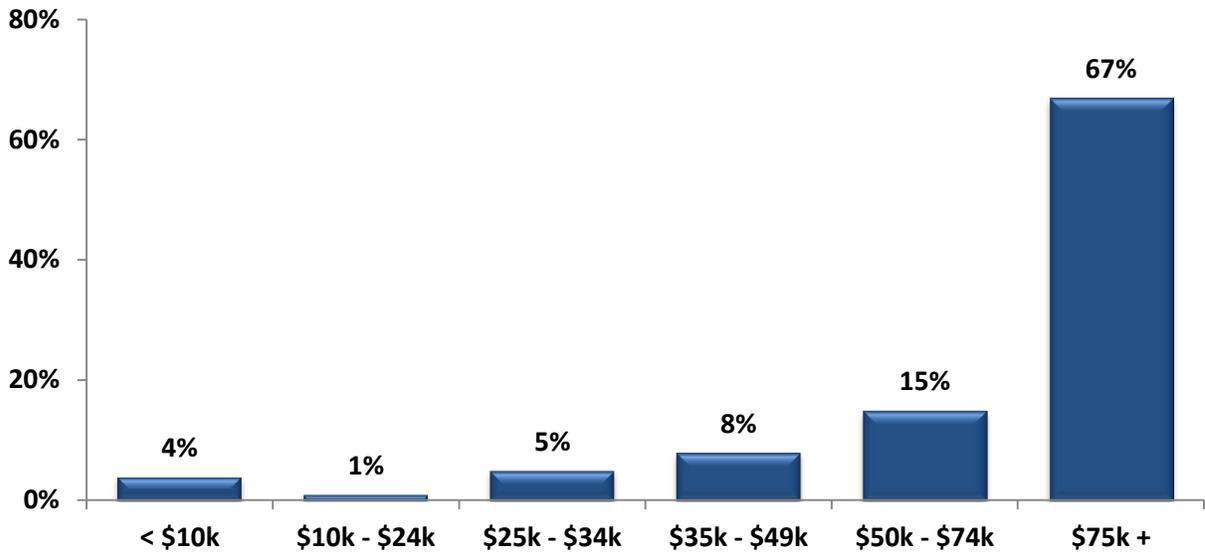
**Figure 49: Weekend – How Well Would You Say You Speak English?  
n=35**



For the 19 percent of Golden Gate Ferry Weekend riders who speak a language other than English at home, the majority (75%) indicate that they speak English “Very Well,” and an additional 19 percent indicate that they speak it “Well.” Six percent describe their ability to speak English as “Not Well,” and zero percent indicated “Not at All.”

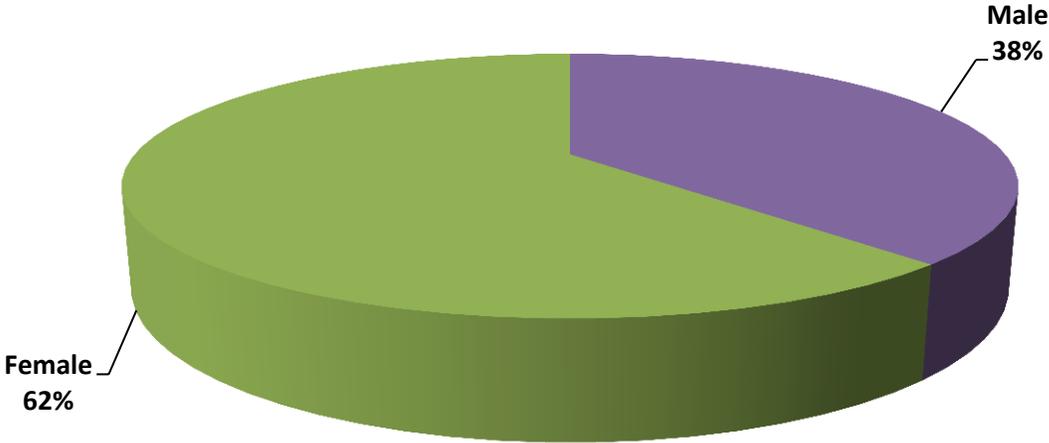
When English fluency is measured by the combination of the “Very Well” and “Well” responses, both weekday and weekend ridership show similar results at 98 and 94 percent respectively.

**Figure 50: Weekend – What is Your Total Household Income?**  
n=163



Weekend riders show a slightly lower distribution of household income with 67 percent having an income of \$75,000 or higher compared to 79 percent for weekdays. Conversely, all other income categories with the exception of \$10,000 to \$24,999 are three percentage points higher. \$10,000 to \$24,000 is one percent, the same as for weekdays.

**Figure 51: Weekend – Gender**  
**n=305**



Golden Gate Ferry weekend ridership has a higher proportion of female riders (62%) than male riders (38%). This is also higher for women than on weekdays when it is 46 percent.

# GOLDEN GATE FERRY AT&T RIDERSHIP

## SURVEY BACKGROUND

During the baseball season Golden Gate Ferry offers ferry service from the Larkspur terminal to AT&T Park for all Giant's home games. The ferry service is timed to coincide with baseball start times. Advanced ticket purchase is required and tickets are not available through the terminal ticket machines and the service, due to its popularity, often sells out. The fare for adults is \$11 per one way trip and up to two children five and under can ride free with a paying adult. Clipper cards are not valid fare media for the AT&T ferry service.

During the baseball season, the service consists of one ferry departure approximately 90 minutes before game-time with a travel time of approximately 60 minutes. The ferry departs from the AT&T Park 30 minutes after the last out.

As a supplement to the 2013 Golden Gate Ferry rider survey, Golden Gate wanted to gain insight into the travel patterns of riders who specifically use the AT&T ferry service.

Using an average estimated ridership of 500 riders per trip, a sampling plan for weekday riders was established at 70 surveys to achieve a statistical accuracy of  $\pm 10.9\%$  at a 95% confidence level and 10.0% at a 90% confidence level. Due to the size of the small sample the results should be considered as directional.

Field surveying was conducted on southbound trips on September 25th and September 26th, 2013 and 233 field surveys were collected which yielded 71 completed phone surveys.

## KEY FINDINGS

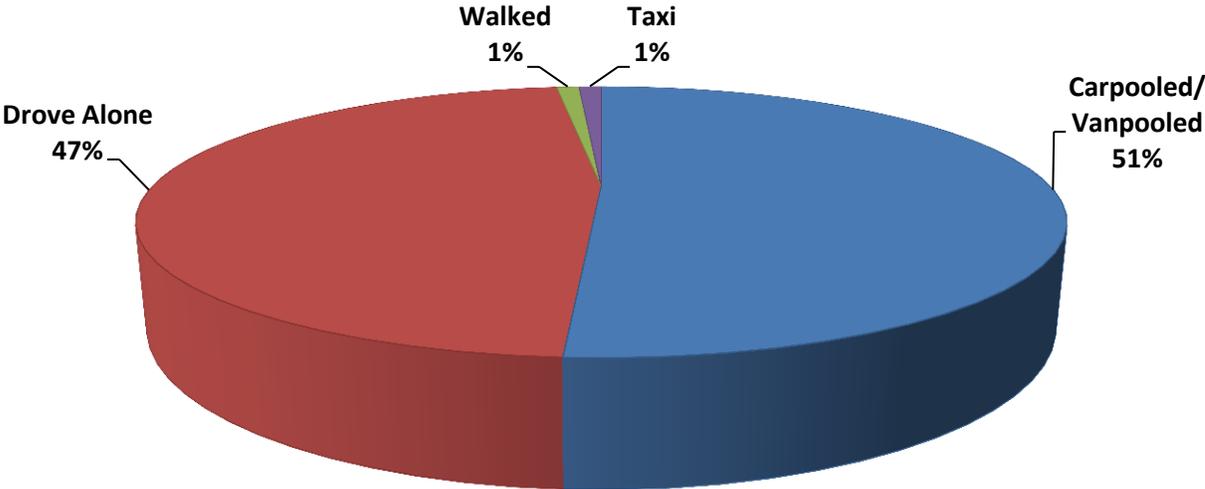
- AT&T Ferry passengers are discretionary riders, who have access to automobiles many of whom travel long distances prior to boarding the ferry.
- Almost all AT&T ferry riders access the ferry by first driving in a private vehicle either alone (47%) or carpooling (41%). Further, the average distance traveled from a rider's origin to their first boarding point is 29.9 miles. Together this indicates that riders are making a conscious decision to use the ferry for the last leg of their trip to avoid slow access/egress by car as well as parking expenses. Taking the ferry may also add entertainment value to their trip.
- In line with this, if the Golden Gate AT&T Ferry was not available the majority of riders would use a car for the trip. Over half of riders (52%) would carpool, while over a third (34%) would drive alone. Very few AT&T ferry riders are transit dependent and do not currently have a driver's license (6%). In a similar finding only one percent of AT&T riders do not have a drivable vehicle available to their household.

# AT&T TRIP CHARACTERISTICS

Golden Gate Ferry riders were surveyed on the AT&T Ferry traveling south to AT&T Park. A total of 71 Computer-assisted telephone interviewing (CATI) surveys were completed for riders on trips departing the Larkspur ferry terminal at 5:45 PM. The trip departure time is coordinated with the game start time.

The trip purpose for all riders is, as would be expected, for social/recreational purposes. Most riders came from home (80%). This was followed by a different social/recreational activity (11%), work (6%), and shopping and college at one percent each<sup>18</sup>

**Figure 52: AT&T - How Do You Get From Your Origin to Your First Boarding Point?**  
n=71

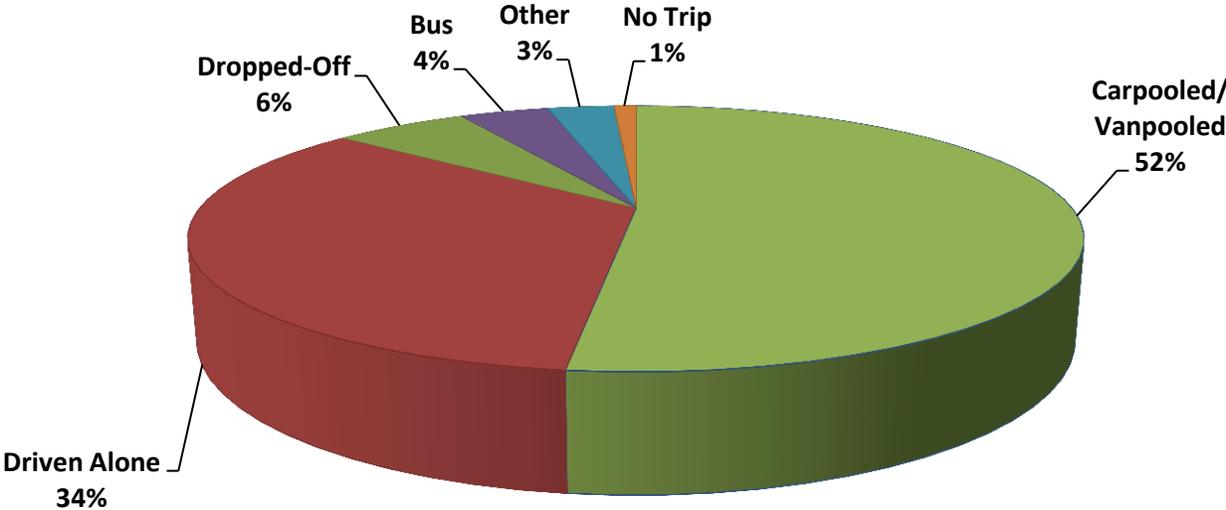


Just over one-half of AT&T riders (51%) carpooled/vanpooled from their origin to their first boarding point, which is consistent with the social recreational nature of the trip where people are often likely to attend a ballgame with at least one other person. A little less than half (47%) of AT&T riders did drive alone, while one percent walked and another one percent used a taxi. For the 99 percent of riders who did not walk to their first boarding point, 70 percent of riders traveled more than five miles. Just over a quarter of riders (26%) traveled between two and five miles, while only five percent traveled less than 2 miles. The average distance traveled from their origin to their first boarding point is 29.9 miles, which indicates that passengers who are using the service are making a conscious decision to

<sup>18</sup> Percentages do not add up to 100% due to rounding.

avoid travelling by vehicle to the park perhaps to avoid traffic, tolls or possibly to add to the entertainment experience by arriving by ferry.

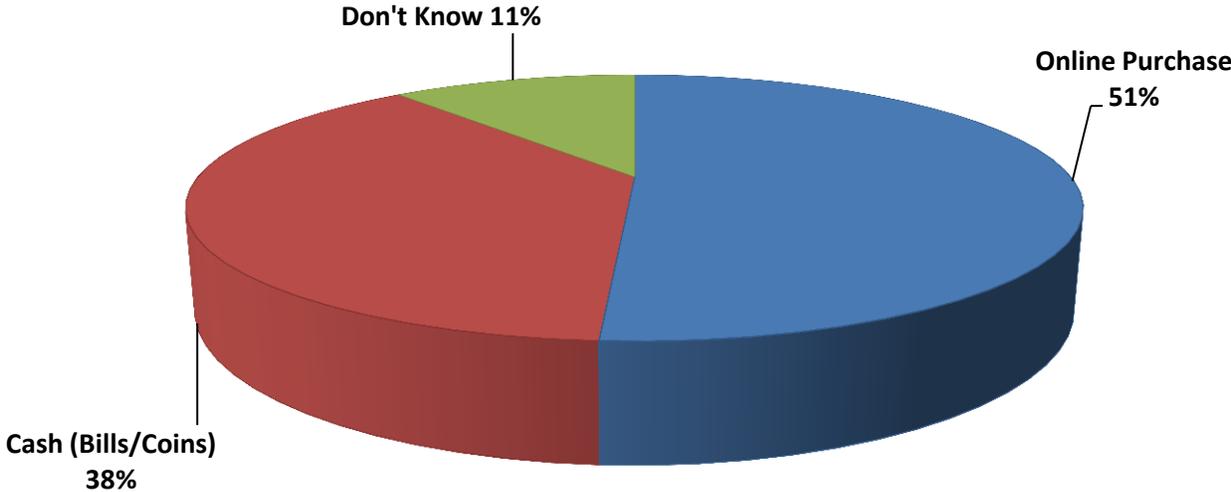
**Figure 53: AT&T - If the Golden Gate Transit Ferry Was Not Available, How Would You Have Made Your Trip?**  
n=71



Almost all riders (92%) would use a private vehicle if the ferry they rode was not available. Over half of riders (52%) say they would carpool/vanpool and 34 percent would drive alone if the Golden Gate AT&T Ferry was not available. Six percent would get dropped off and four percent would ride the bus if the service was not available.

# AT&T FARE MEDIA

Figure 54: AT&T - How Do You Pay For Your Ferry Fare?  
n=71



Approximately half of AT&T ferry riders (51%) pay for their fare by purchasing a ticket online. Over two-thirds of riders (38%) use cash in the form of bills and coins. Eleven percent could not recall how they paid for the trip. At 91 percent, the vast majority of AT&T ferry riders paid a full adult fare.

## **AT&T TRANSPORTATION DEMOGRAPHICS**

The vast majority of AT&T Ferry riders are choice riders with only six percent being transit dependent as defined by not having a driver's license. Consistent with possession of a driver's license, 99 percent of AT&T riders have a drivable vehicle available to their household.

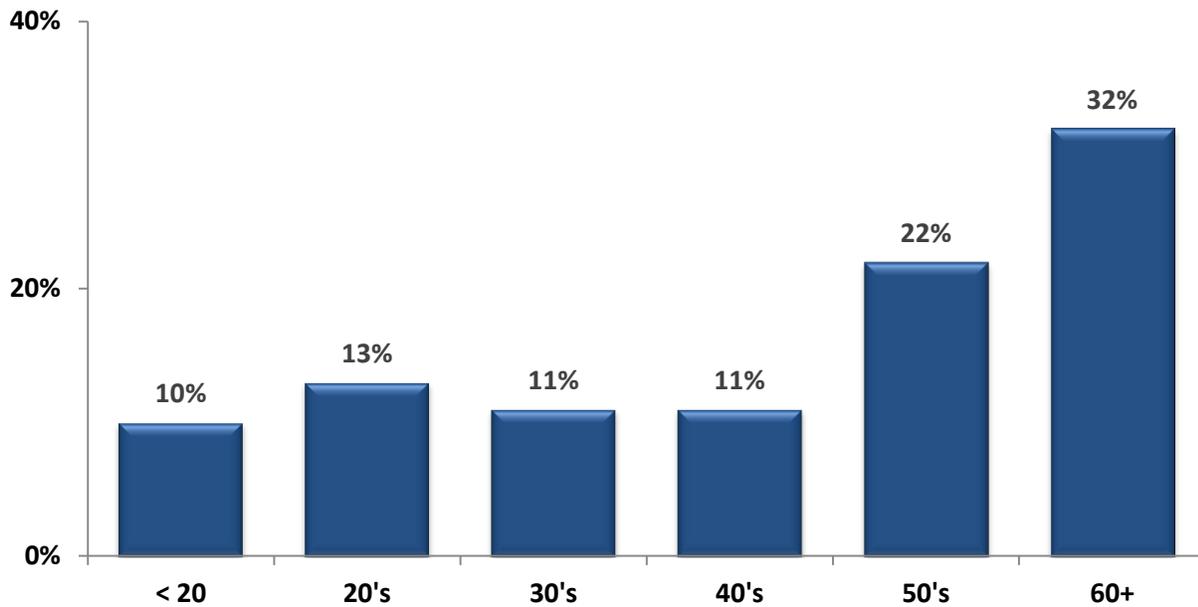
## **AT&T RIDER DEMOGRAPHICS**

Nearly two-thirds (65%) of Golden Gate AT&T Ferry riders are either employed, students, or both. Riders who only work make up the largest proportion, accounting for 52 percent of ridership. Six percent of the AT&T Ferry riders are only students, and seven percent are both employed and a student. At 35 percent, over a third of riders are neither employed nor students.

At 79 percent, almost four out of five riders have at least one person employed in their household. Twenty percent of riders have one person in their household that works either full or part-time, 38 percent have two employed people in the household, and 21 percent have three or more employed people in the household. The average number of employed persons per household is 1.7.

Only a small percentage (6%) identified themselves as Hispanic, Latino, or of Spanish origin. The majority of AT&T riders who selected a discrete listed race category identified themselves as White (87%). Just seven percent of AT&T riders speak a language other than English at home.

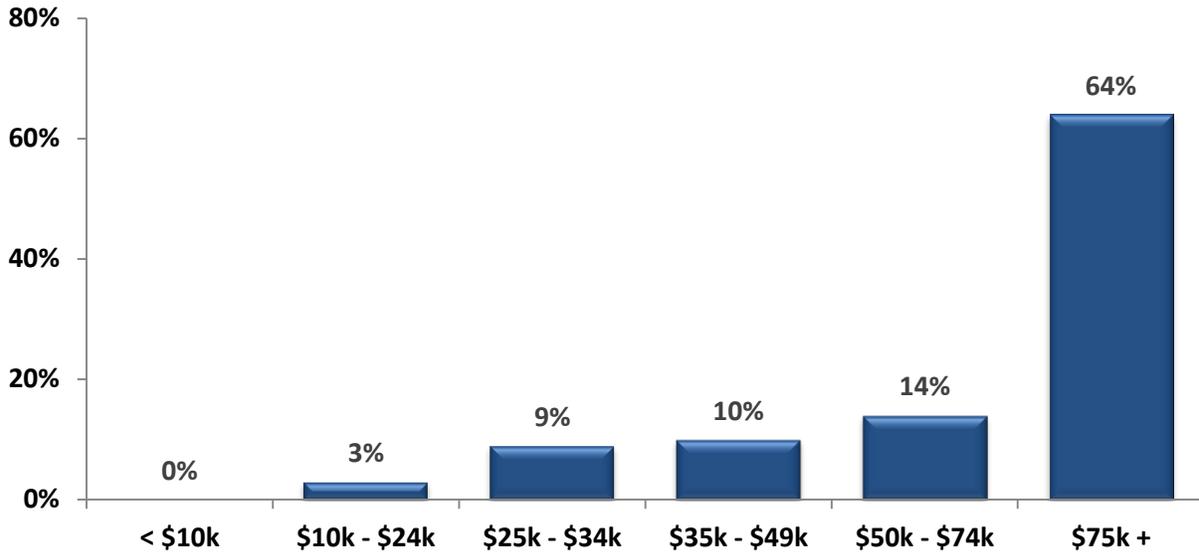
**Figure 55: AT&T - What Is Your Age Category?**  
n=71



Ten percent of riders are under 20 and thirteen percent are in their 20's while riders in their 30's and 40's each comprise 11 percent of ridership. More than half of the riders (54%) are 50 or older.<sup>19</sup> The under 20, and 60 or older categories are both higher than for regular weekday ferry riders, while all categories between the 20's and 50's are lower or the same as regular weekday ferry riders.

<sup>19</sup> Percentages do not add up to 100% due to rounding.

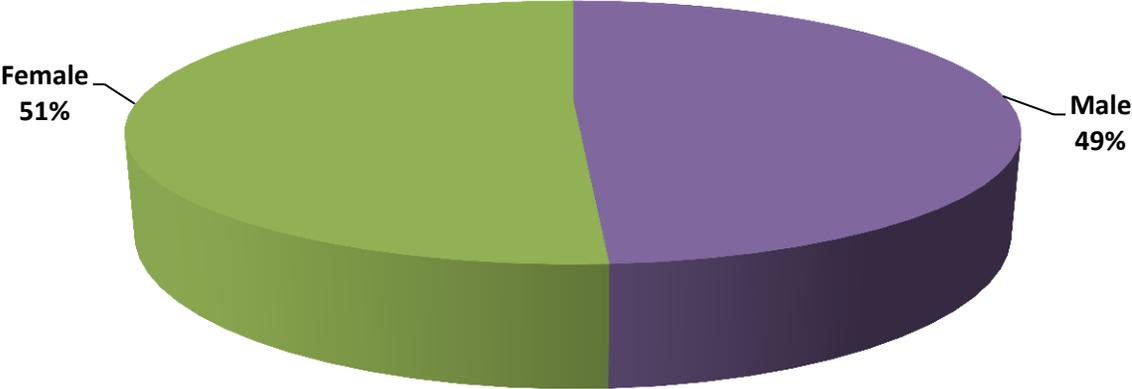
**Figure 56: AT&T - What is Your Total Household Income?**  
n=59



Ninety percent of AT&T riders have an annual household income of \$35,000 or more and almost two-thirds, (64%) of riders earn \$75,000 or more per year<sup>20</sup>. Although AT&T ferry riders are relatively affluent, their median income is lower than weekday ferry riders where 79 percent have an income above \$75,000, and only five percent have an income below \$35,000 (vs. 10% for AT&T riders).

<sup>20</sup> Percentages under and over \$35,000 are slightly different than the sum of the individual categories due to rounding.

**Figure 57: AT&T - Gender**  
n=71



Golden Gate AT&T Ferry ridership is almost evenly split between men and women.