



HIGHLIGHTS FROM THE 2023 SURVEY OF USERS AND NON-USERS OF BRIDGE, BUS AND FERRY

TRANSPORTATION COMMITTEE AGENDA ITEM NO. 4

October 24, 2024

Background

- When: Conducted in 2023-2024
- To better understand:
 - Changes in post-pandemic travel patterns
 - How riders use bus/ferry
 - Reasons riders choose bus/ferry
 - Who riders are. Title VI components.
 - Likelihood of drivers to consider transit
 - Current barriers to using the bus/ferry
 - Canal District residents transit use and needs
- Why? To guide service priorities, marketing, outreach, Title VI, planning, etc.

Study Components

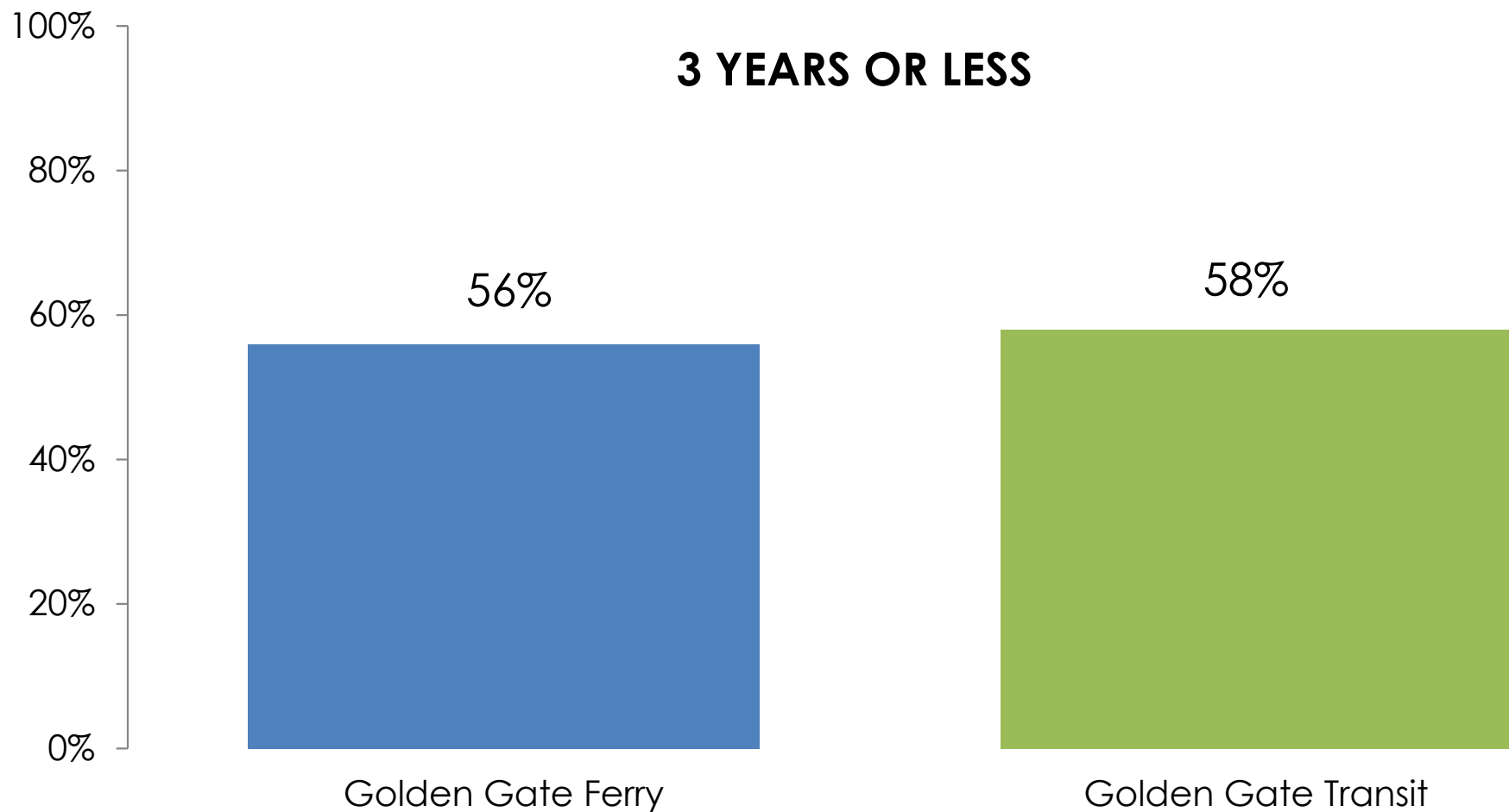
- Onboard survey of Golden Gate bus and ferry riders
- Non-Rider survey among residents of Sonoma, Marin, and San Francisco counties
- In-Depth qualitative survey among drivers and infrequent transit riders
- Targeted survey among Canal District residents

On-Board Rider Survey - Usage

- New Riders: More than half of current riders began using Golden Gate Transit or Golden Gate Ferry in the past 3 years.
- Weekly Usage: Golden Gate Transit riders use the service about 3 days per week; Golden Gate Ferry riders use the service 1 day per week.
- Future Patronage: About 9 in 10 current riders will use the service in the future at least as often as they do now.
 - 35% of Transit riders and 43% of Ferry riders say they will use the service **more** in the coming year. This is an exceptionally encouraging response!

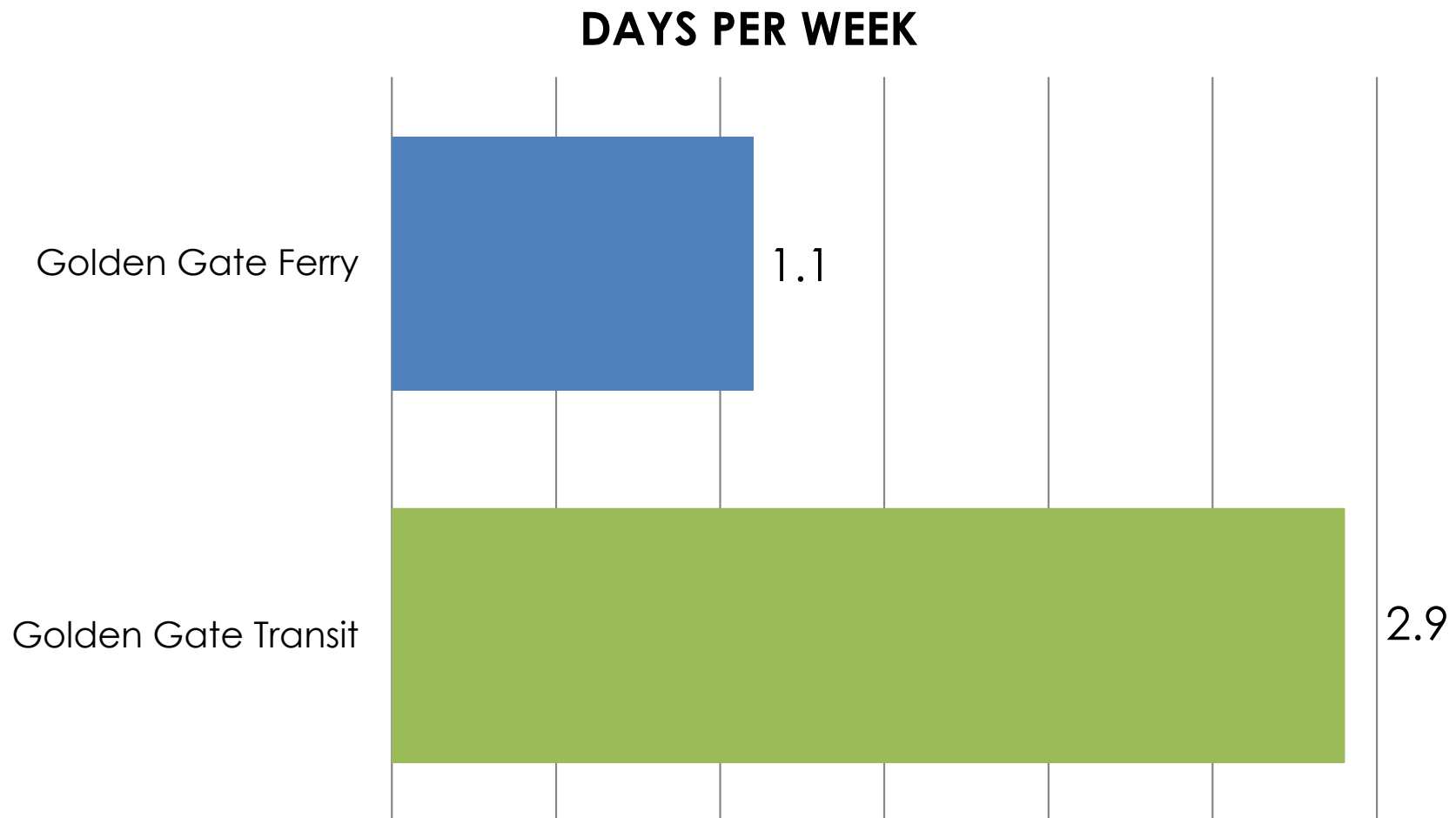
New Riders (On-Board Rider Survey)

How long have you been using Golden Gate Ferry?...Golden Gate Transit buses?



Weekly Usage (On-Board Rider Survey)

How often do you use Golden Gate Ferry?...Golden Gate Transit buses?



Usage in Future (On-Board Rider Survey)

Do you plan to use Golden Gate Ferry/Transit more or less in the next year or so?

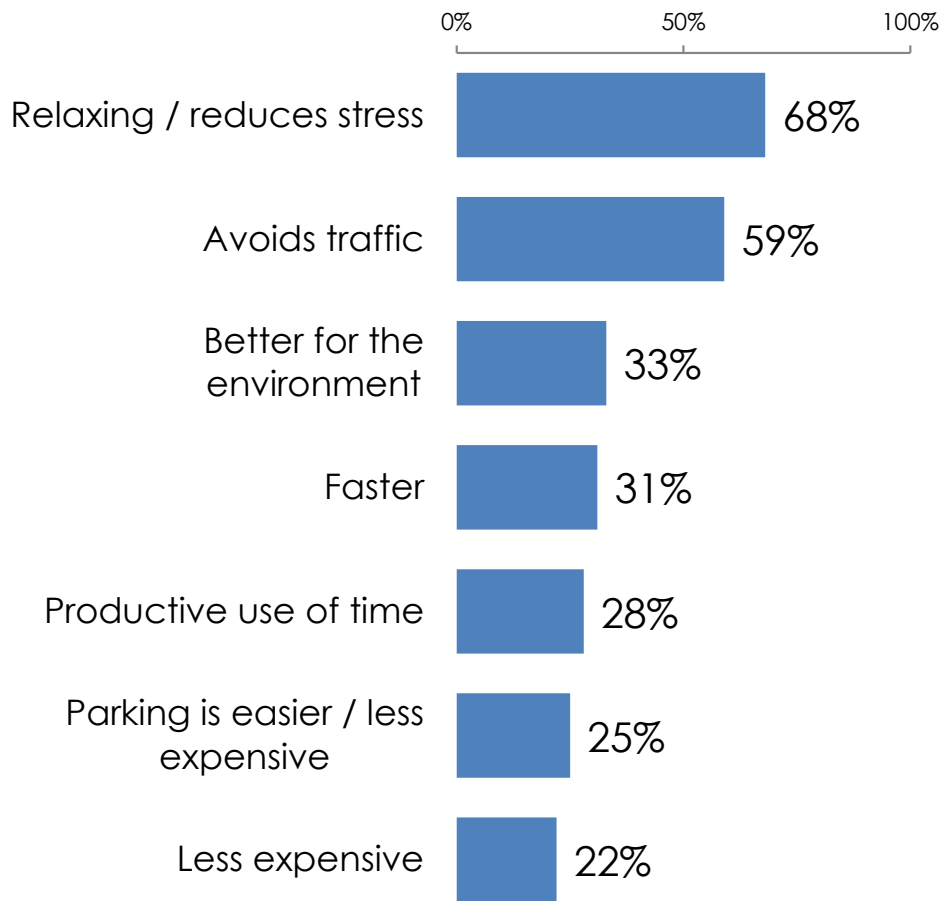
Plan to use...	Golden Gate Ferry	Golden Gate Transit
More	37%	35%
About the Same	54%	55%
Less	9%	10%

Perceptions (On-Board Rider Survey)

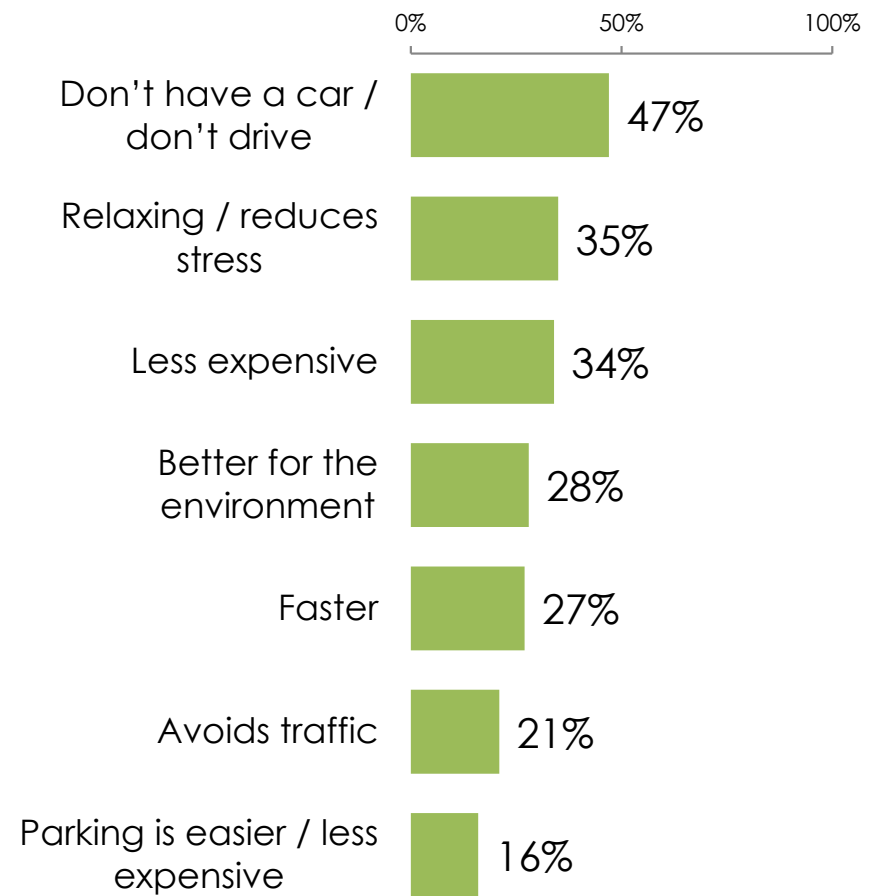
- Key reasons use ferry/bus instead of other options
 - Ferry:
 - Relaxing
 - Avoids traffic
 - Better for the environment
 - Faster
 - Bus:
 - Don't have a car/don't drive
 - Relaxing
 - Less expensive
 - Better for the environment

Key Reasons to Use (On-Board Rider Survey)

FERRY



BUS



Partial list, top reasons shown

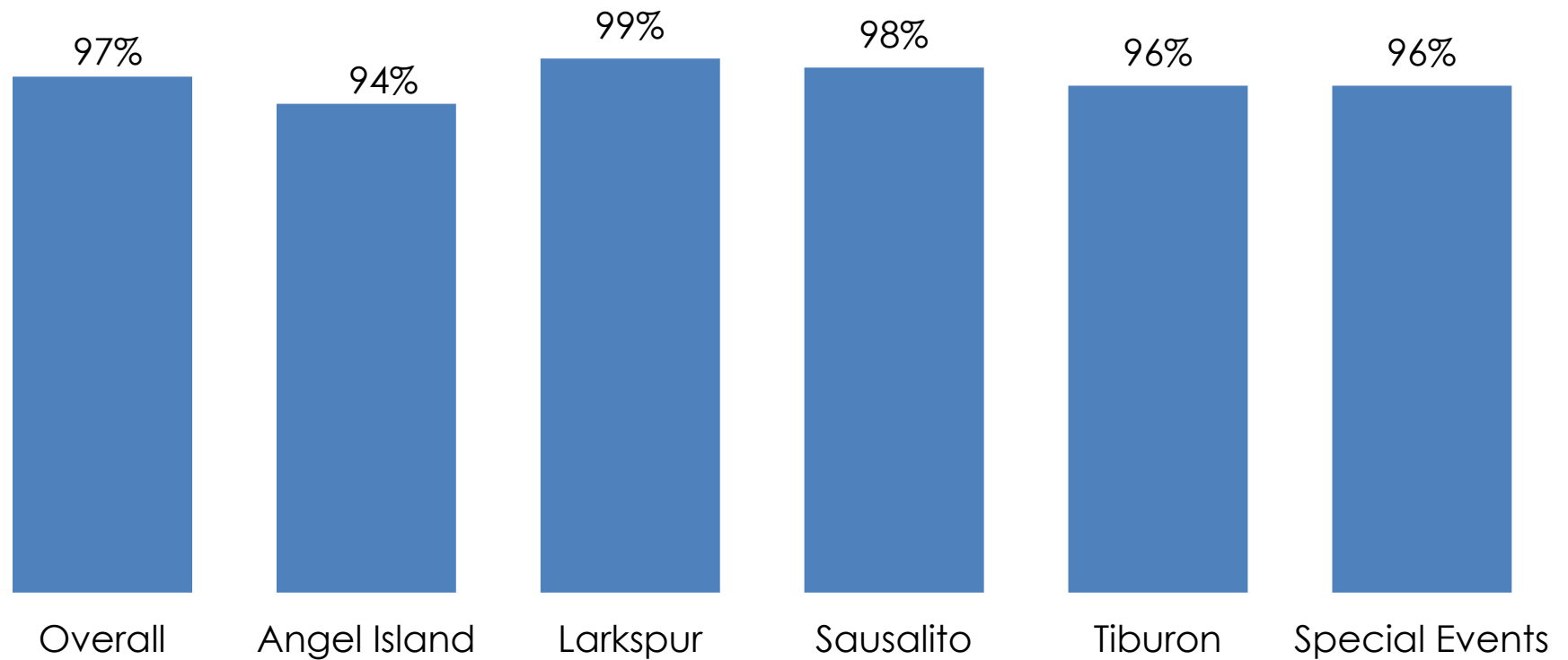
Overall Satisfaction (On-Board Rider Survey)

- Rating of overall satisfaction is very strong for both ferry and bus
 - Ferry: 97% rate service 5 (excellent) or 4
 - Bus: 86% rate service 5 (excellent) or 4

Overall Satisfaction - Ferry (by route)

Overall rating of Golden Gate Ferry service:

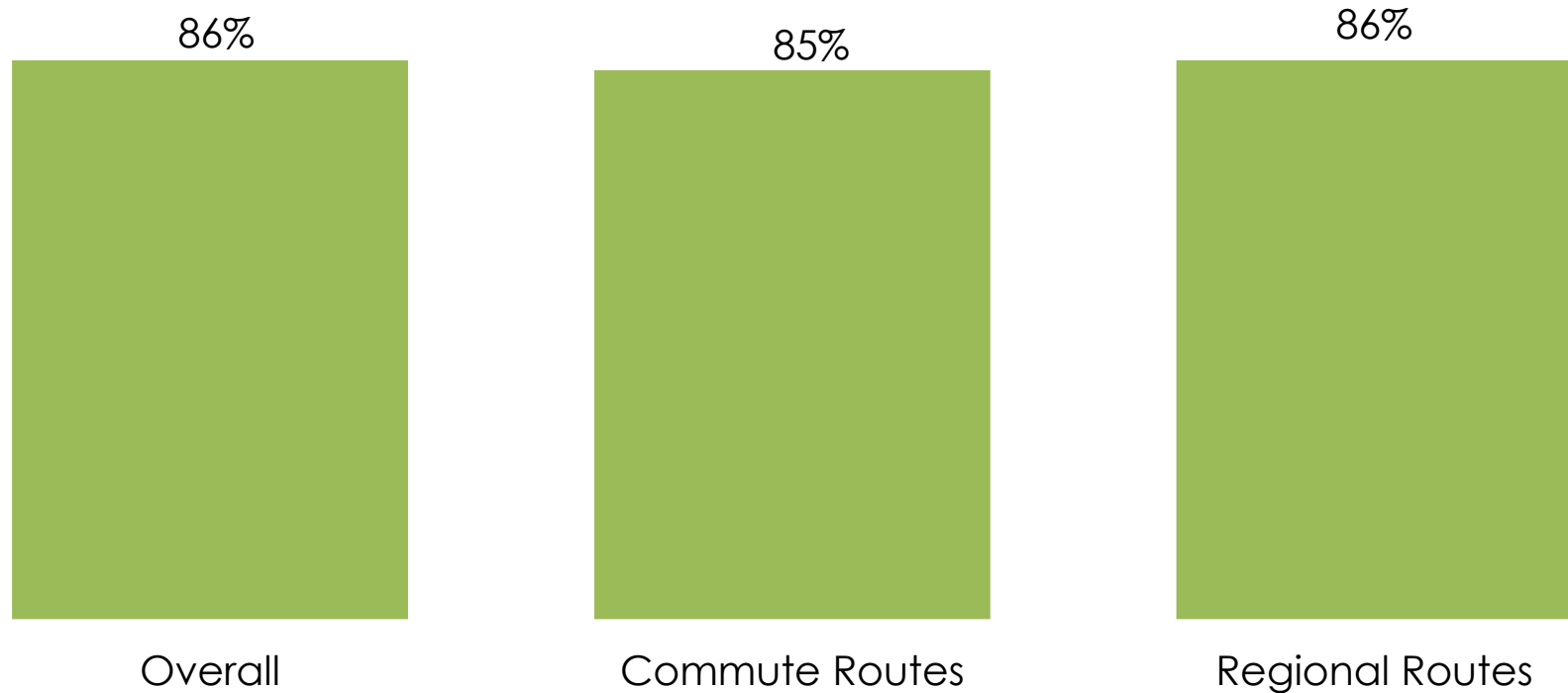
% RATING EXCELLENT (5) or (4)



Overall Satisfaction - Bus (by service type)

Overall rating of Golden Gate Transit service:

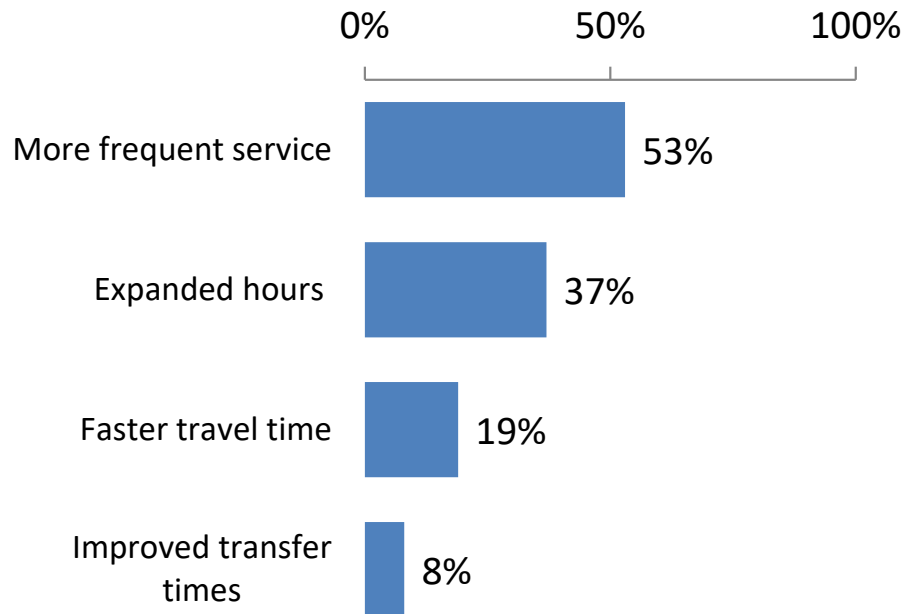
% RATING EXCELLENT (5) or (4)



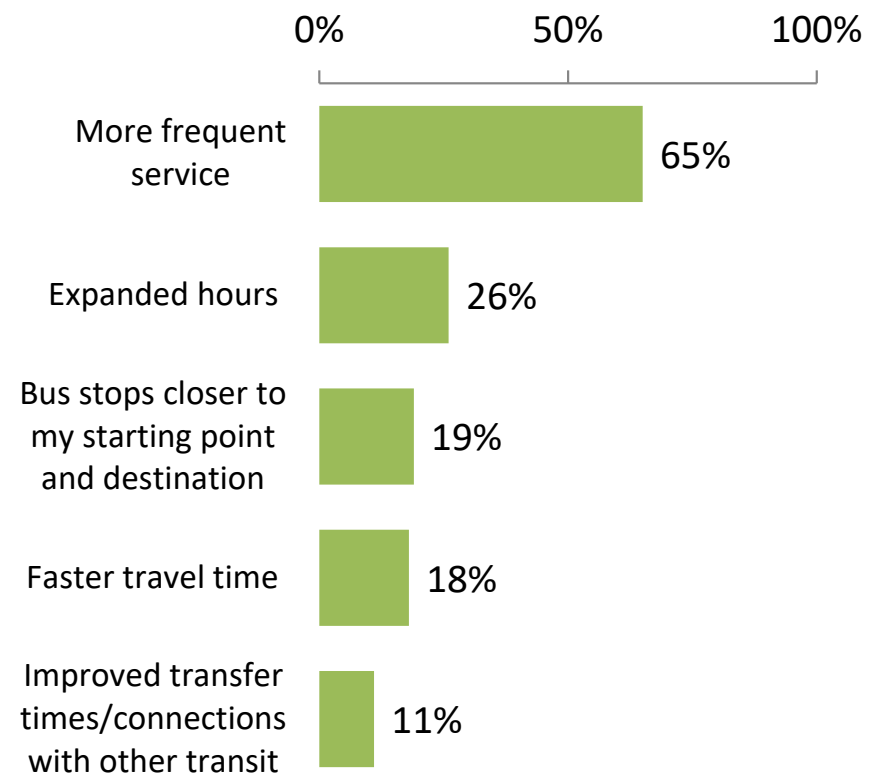
Improvements (On-Board Rider Survey)

Which of the following would have improved your trip today? (multiple responses accepted)

FERRY



BUS

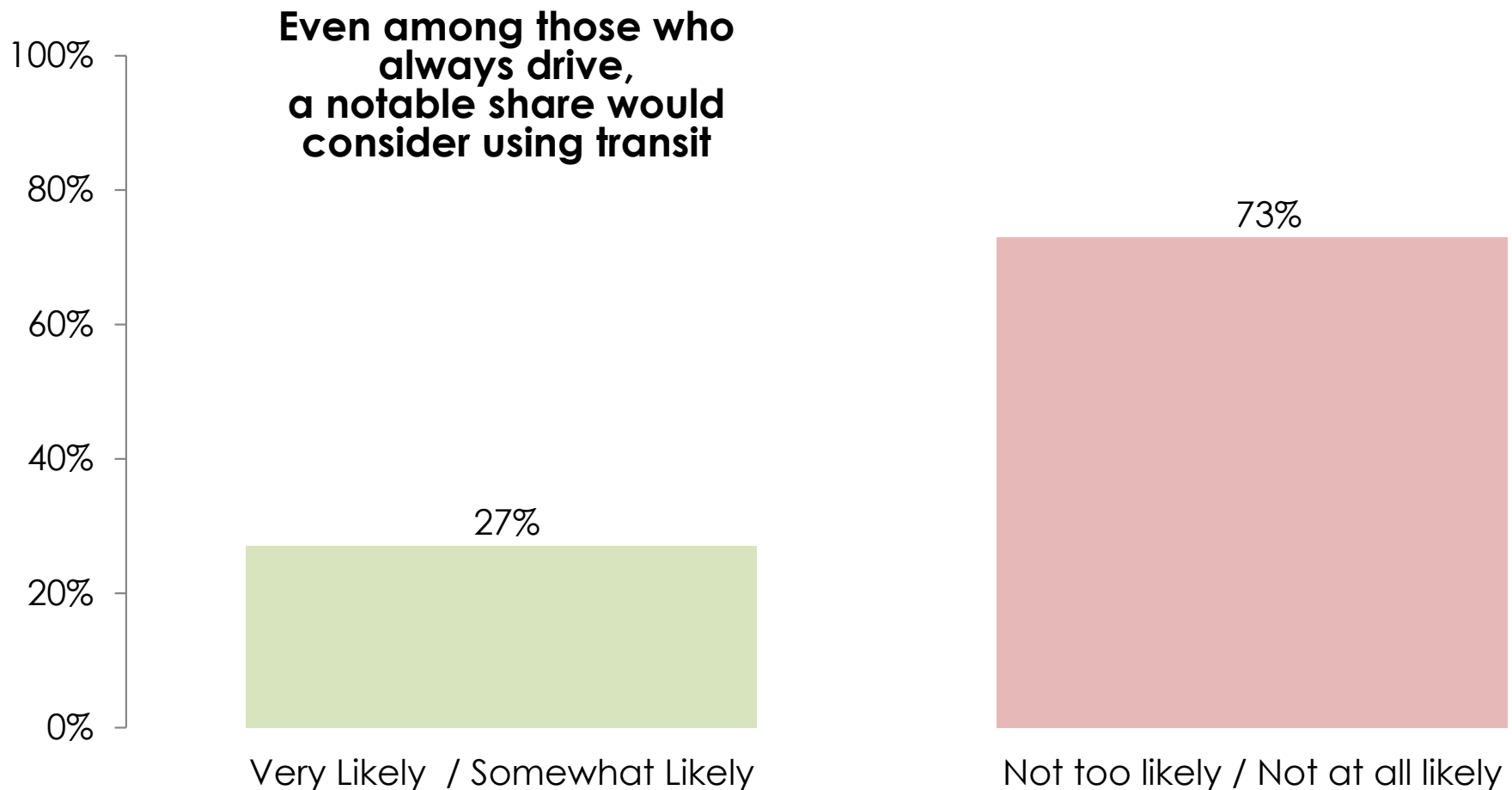


Only listed responses shown

Willingness to Consider Transit

(Non/Infrequent Rider Survey)

How likely would you be to consider the bus or ferry (for this trip)?



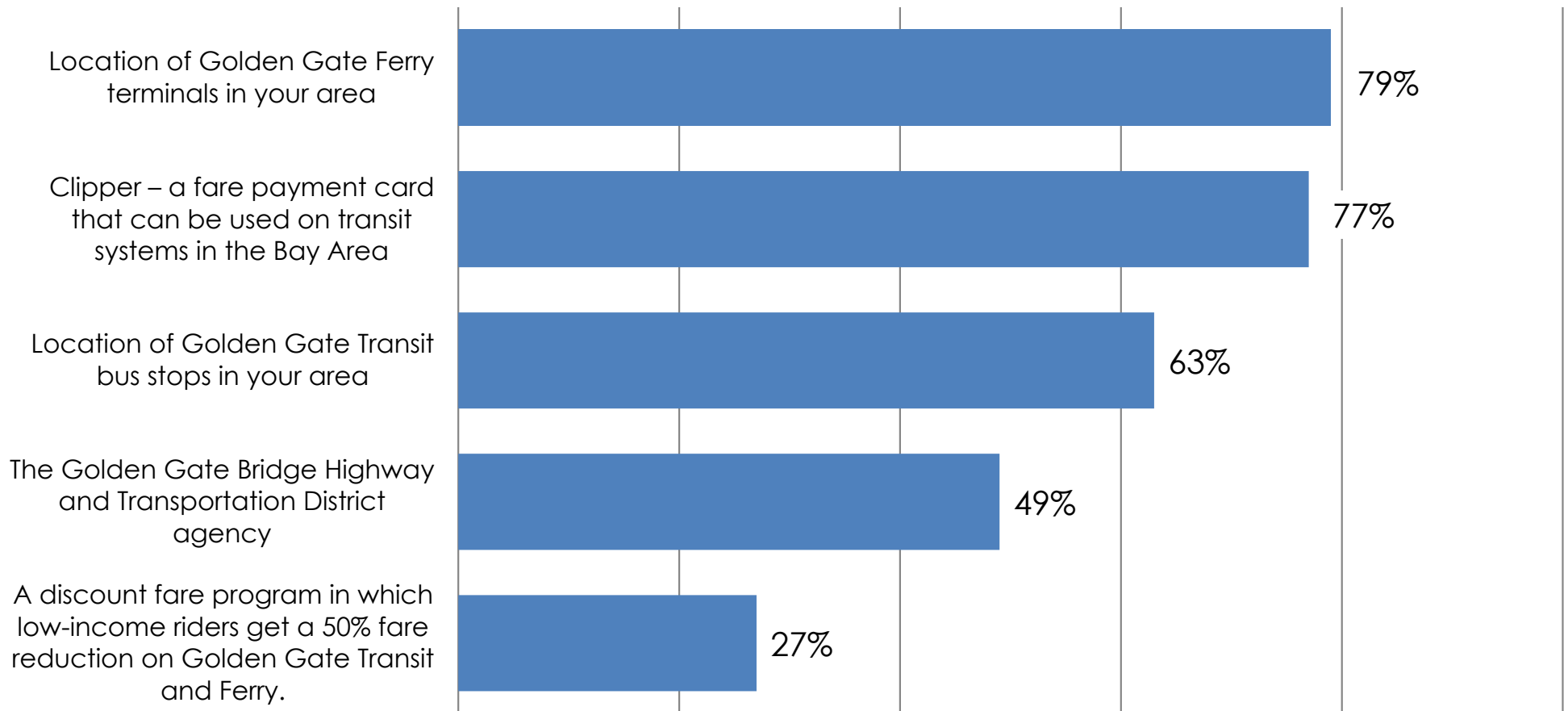
Barriers (Non/Infrequent Rider Survey)

- Among drivers, the most commonly cited barriers to using the bus or ferry were:
 - Trip takes too long
 - Stops / Stations not close enough
 - Too many transfers
 - Too constraining (can't go where I need to go)
 - More convenient / comfortable to drive
 - Too expensive

Awareness (Non/Infrequent Rider Survey)

How familiar are you with each of the following?

% VERY or SOMEWHAT FAMILIAR



Canal District

Marin Transit is used by a large share of Canal residents, followed by car and Golden Gate Transit

How do you usually get to places outside the Canal neighborhood? (multiples accepted)

Marin Transit bus	73%
Car	38%
Golden Gate Transit bus	35%
Walk all the way	5%
Train	2%

Canal District

- Canal residents were asked whether they'd travelled to specific destinations served by Golden Gate Transit in the past 2 months.
 - 42% travelled to San Francisco in the past 2 months
 - 16% travelled to Richmond or El Cerrito
 - Only 7% travelled to Sonoma County
- When asked why they do not use Golden Gate Transit more often, nearly two-thirds of respondents indicated they don't travel outside of Marin County very much. This was the most common reason given for not using Golden Gate Transit.

Additional Information / Questions

- High level findings included in today's presentation
- Detailed, in-depth reports, also compiled.
- Questions?

Thank You!

