

Golden Gate Bridge Highway & Transportation District



2008 Regional Customer Study



Corey, Canapary & Galanis Background

- Established in 1933
- Local Bay Area firm
- Full service market research firm with in-house services
- Expertise in transit-related research as well as other areas
- Have on-call contracts with or have performed work for most Bay Area transit agencies, including BART, SamTrans, and Caltrain



Project Background

- **Learn more about current customers**
 - Who are they?
 - What are the strengths of the District's services?
 - What changes would they like to see?
- **Learn more about non-transit users**
 - Who are they?
 - Why drive (rather than use transit)?
 - What might entice them to use transit?
- **Last comprehensive studies conducted mid-1980s**



Components of the 2008 Study

On-board Golden Gate Transit Survey *(5,772 passengers)*

On-board Golden Gate Ferry Survey *(3,919 passengers)*

Golden Gate Bridge Driver Survey *(816 drivers)*

Focus Groups – Current and Potential Customers

(9 groups, 10-13 participants per group)

Key – Developing a sampling plan

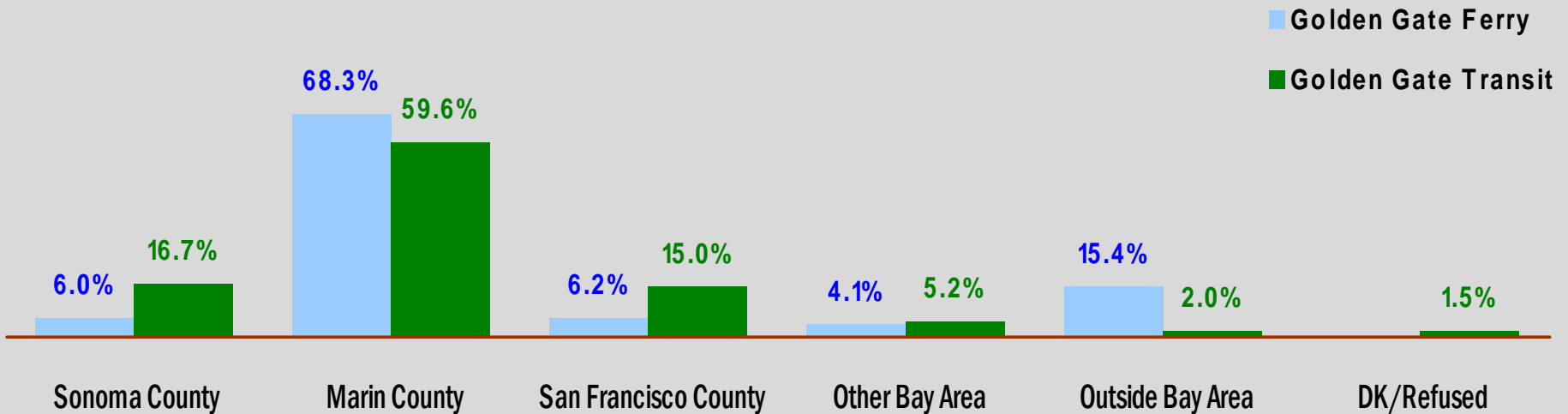
- Identify important segments (planning)
- Establish priorities for sampling
 - Line/corridor
 - Neighborhood/geographic area

Survey Results: Customer Characteristics



Geography

Geographic Distribution - District Customers





Income and Age

Average (Mean) Household Income

Golden Gate Ferry	\$131,800
Golden Gate Ferry – Local	\$137,000
Golden Gate Ferry – Visitor	\$111,000
Golden Gate Transit	\$ 86,920
Golden Gate Bridge Drivers	\$126,700

Median Age

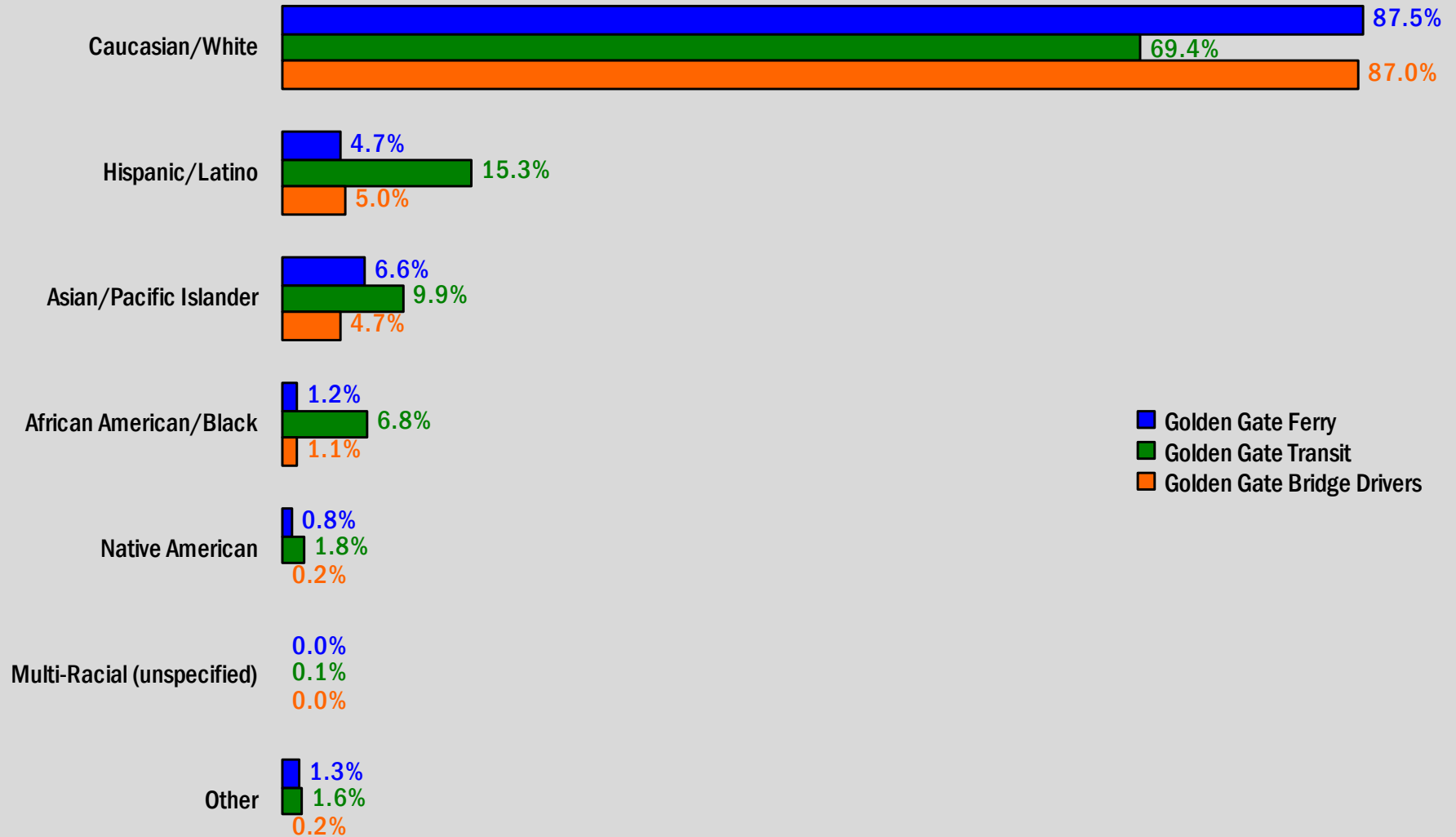
Golden Gate Ferry.....	45.8 Years
Golden Gate Ferry – Local.....	45.5 Years
Golden Gate Ferry – Visitor...	47.3 Years
Golden Gate Transit.....	41.0 Years
Golden Gate Bridge Drivers.....	51.0 Years

Only Ferry and Transit customers over 12 years of age were surveyed.

Only Golden Gate Bridge drivers 18 years of age and older were surveyed.



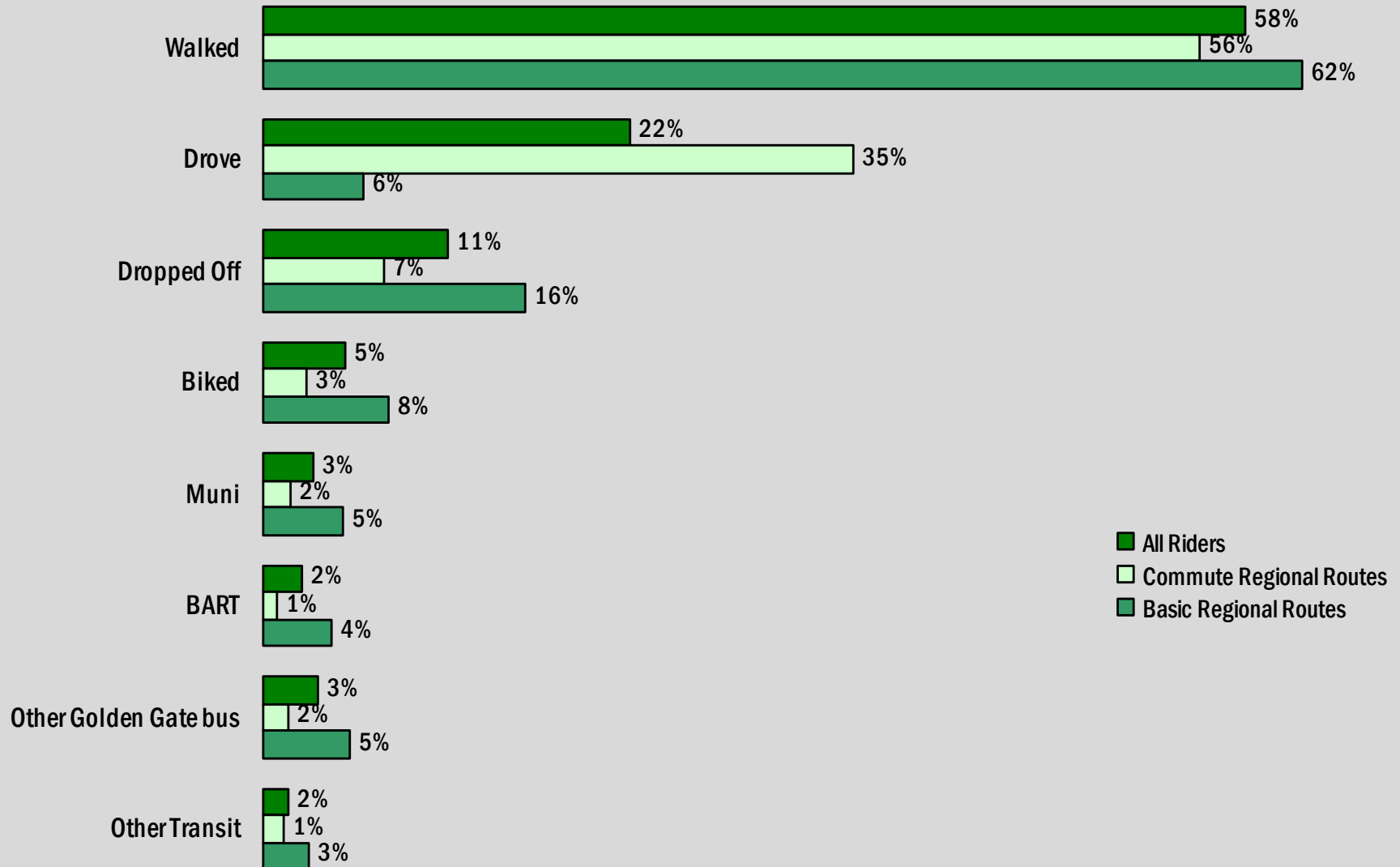
Race/Ethnicity



**Survey Results –
Travel Mode/Choice:
Golden Gate Transit**

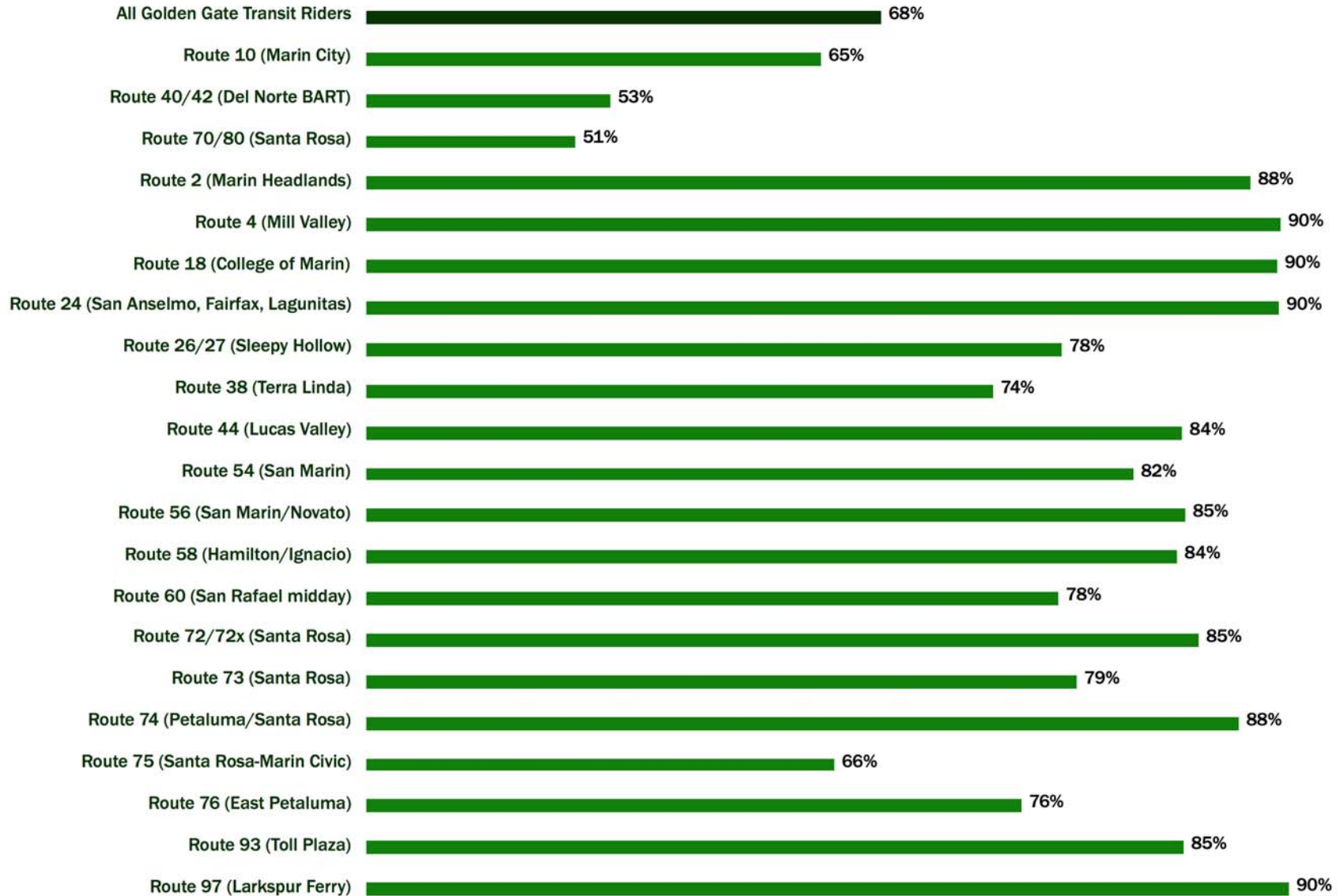


Access to Bus





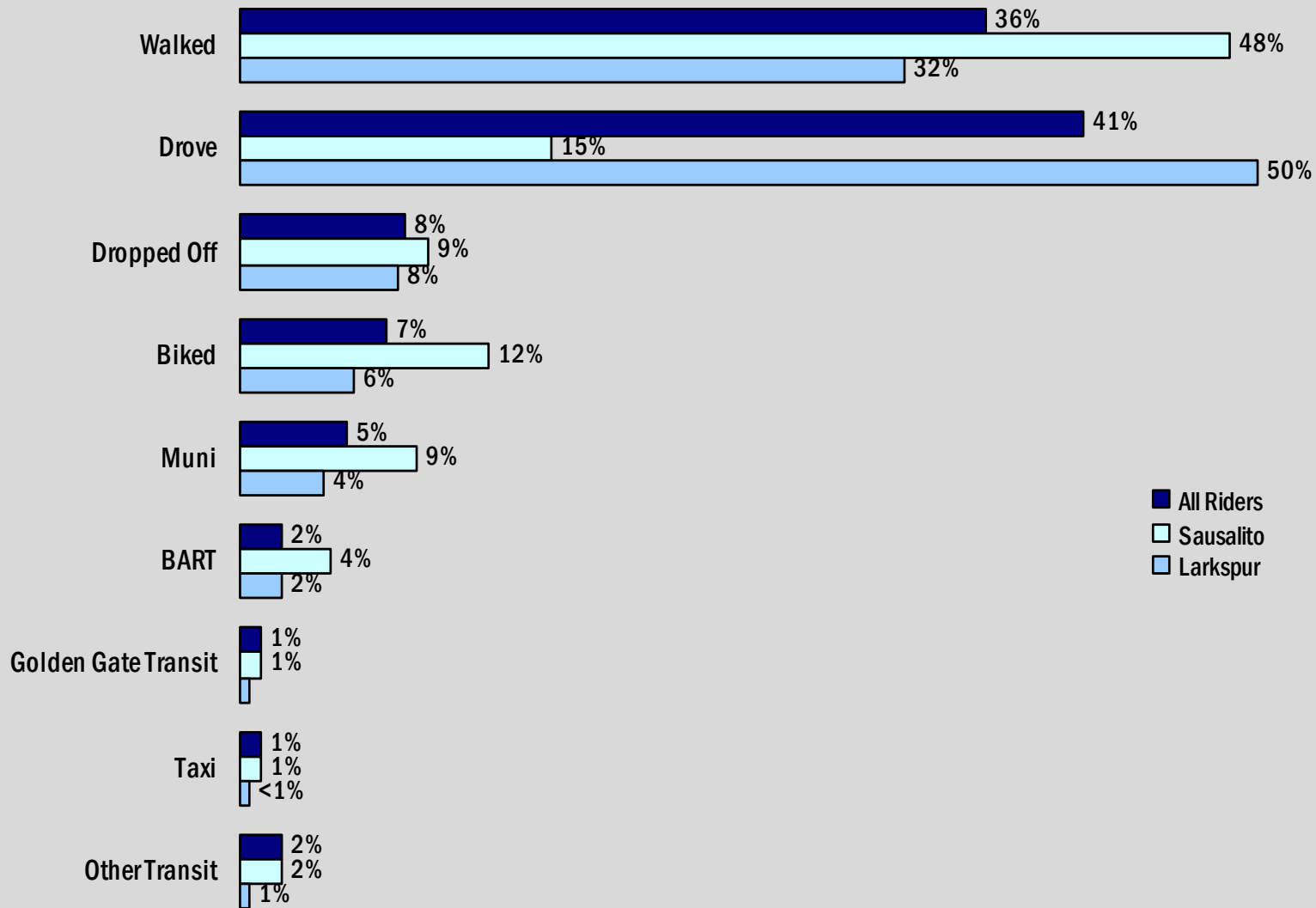
Choice Ridership – Golden Gate Transit



**Survey Results –
Travel Mode/Choice:
Golden Gate Ferry**



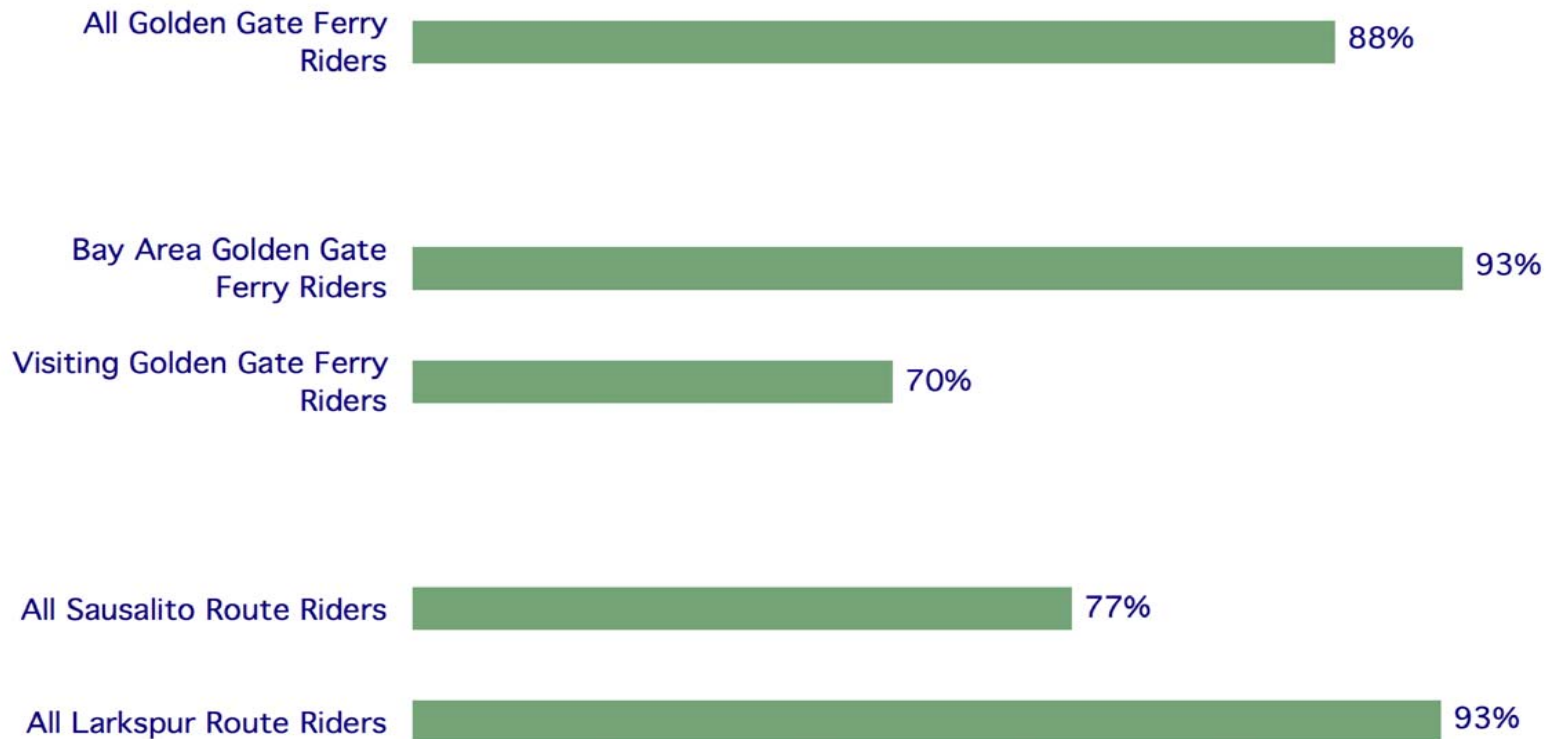
Access to Ferry





Choice Ridership – Golden Gate Ferry

Almost all Golden Gate Ferry riders (88%) are "choice" riders – that is, they could use some other mode of transportation. Only 12% have no other option.



Regional Survey Results: Customer Satisfaction



Overall Satisfaction

Riders of both transit services were asked to rate a number of service attributes, as well as their overall satisfaction, on a scale from 1 to 5, with "1" indicating they were Very Dissatisfied and "5" indicating they were Very Satisfied. Ratings are averaged to as a way to provide a rating from passengers as a whole. This is the average, or mean, score.

Overall rating of Golden Gate Transit	3.92
• Basic Route Riders	3.95
• Commute Route Riders	3.89
Overall rating of Golden Gate Ferry	4.15
• Sausalito Route	4.22
• Larkspur Route	4.12



Rating of Service Attributes

Golden Gate Transit riders rated their sense of security, as well as driver courtesy and professionalism, highly.

Golden Gate ferry riders rated their sense of security, interactions with ferry personnel, and on-time performance quite highly.

	Total		Total
Base (All Riders)	5,772	Base (All Riders)	3919
Sense of security on the bus	4.30	Sense of security on the ferry	4.39
Cleanliness of buses	4.17	Sense of security at ferry terminals	4.37
Professionalism of drivers	4.14	Courtesy of ferry personnel	4.28
How close bus stop is to my destination	4.09	Professionalism of ferry personnel	4.25
Access for riders with disabilities	4.08	On-time performance of ferries	4.24
Sense of security at bus stop	4.05	How close terminal is to my destination	4.19
Courtesy of drivers	4.05	Total trip time	4.18
		Access for riders with disabilities	4.15
		Overall condition of ferry terminals	4.09

This chart shows only the highest ranking attributes (not a complete list)



Rating of Service Attributes – Bus and Ferry

Both Golden Gate Transit and Golden Gate Ferry riders gave the lowest ratings to:

- Frequency: Ferry – 3.57 Bus – 3.16
- Hours of operation: Ferry – 3.67 Bus – 3.35
(*e.g. span of service*)

Other areas of improvement vary widely by service and route.

Results From Non-Rider Telephone Study



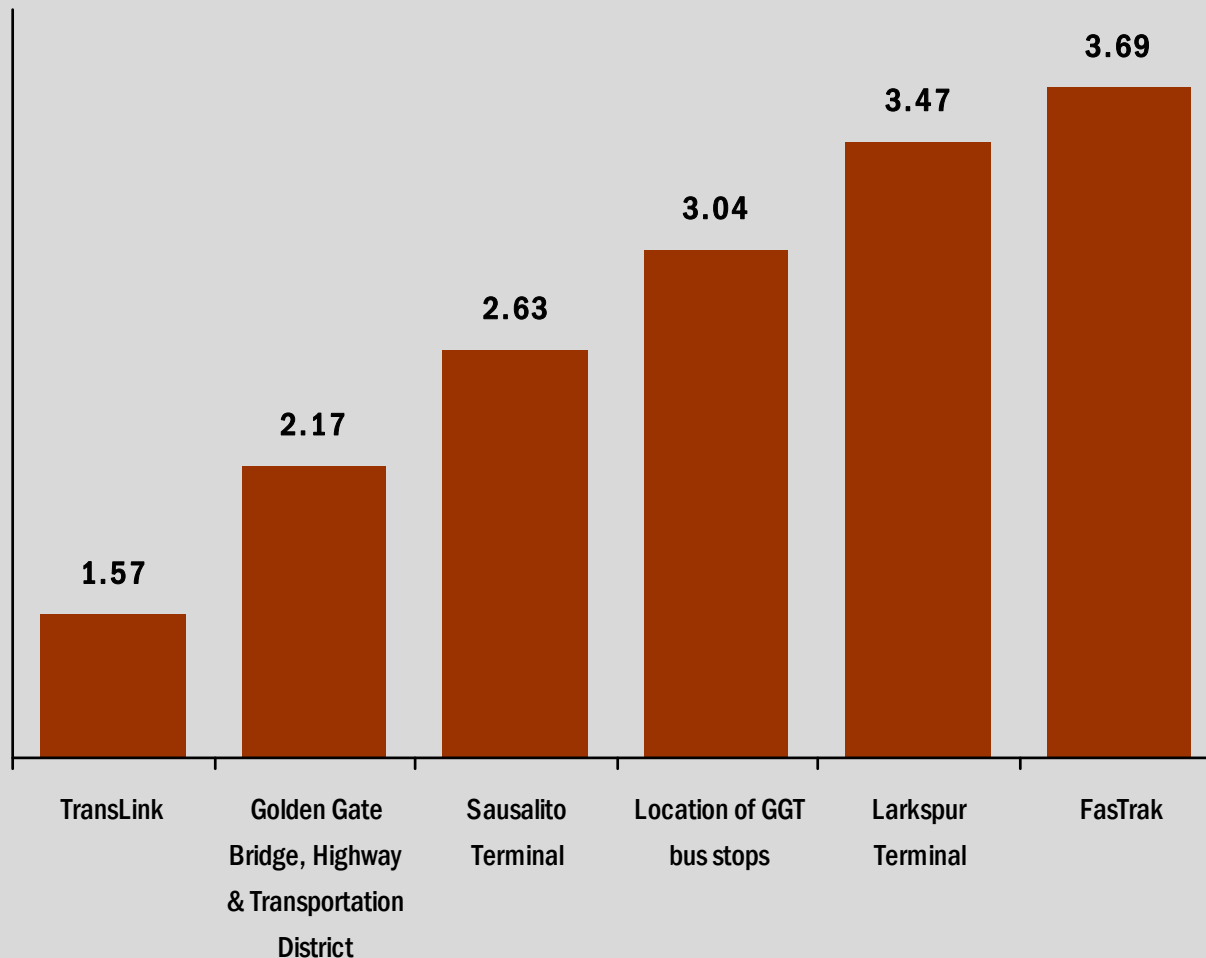
Drivers - Awareness of Transit Resources

How familiar are you with each of the following . . . ?

Are you Very familiar [4], Somewhat familiar [3], Not too familiar [2], or Not at all familiar [1]?

4 (Very Familiar)

1 (Not at all Familiar)





Drivers – Attitudinal Statements

Now I am going to read you a list of statements regarding trips you make from your home to San Francisco or San Mateo County. For each, please rate the statement on a 10 point scale, where 10 means agree strongly and 1 means disagree strongly. You may choose any number in between.





Drivers and Motivating Factors

When asked what they did not like about the drive over the Golden Gate Bridge:

- 38% said traffic
- 34% cited bridge tolls.
- About 20% said there was “nothing” they disliked about the drive.

When asked what would make them consider using the bus or ferry:

- 27% said “Nothing” would make them consider using either the bus or the ferry.
- 16% said Direct service/express service/infrequent stops
- 15% said Easy access/door to door service
- 12% said More frequent service/less crowded service

Some driver groups were more inclined to be open to taking transit. This included:

- Younger drivers
- Drivers who had resided in their homes less than 5 years
- Renters
- Those who were traveling for work or school
- Those who worked from home or telecommuted at least occasionally

Results From Focus Groups



Focus Group Results – Why Use Transit?

Both riders and non-riders saw using the bus or ferry as an overall effort to help reduce the environmental impact of their daily lives.

Non-riders and occasional users generally weighed this against the additional time required to use transit.

Both time and environmental considerations, along with the fare paid, contributed to riders' perception of value.



Focus Group Results - WiFi

Both riders and non-riders were enthusiastic about free Wi-Fi aboard Golden Gate Transit buses and Golden Gate Ferry.

Many riders and non-riders alike felt that Wi-Fi added to the value of taking the bus or ferry and mitigated the extra time it took to use transit.

Although some riders indicated they valued the 'down time' the commute provides or that Wi-Fi just wasn't for them, there was no real outright opposition.



Focus Groups – Comfort

- **Reverse bus commuters** and **occasional bus riders**, who tended to use other transit systems as well, said Golden Gate Transit compared very favorably, particularly in the area of cleanliness (a key factor in their definition of comfort). They generally indicated that having a seat on a clean bus met or exceeded their expectations.
- **Regular bus riders**, particularly those coming from Northern Marin and Sonoma counties, were more likely to indicate that the ride was not as comfortable. However, the specific factor that contributed to the discomfort varied from person to person, with many factors being attributable to a person's height, leg length, etc.
- **Ferry users** generally indicated their ride was the most comfortable. Among the factors were the various forms of seating; having the option of being able to work, sleep, or socialize; having plenty of room; and being able to eat, drink, and use restrooms.



Focus Groups – Reverse Commuters

Reverse Golden Gate Transit Riders

- Likely to switch back and forth between Golden Gate Transit and Golden Gate Ferry
- More likely to use a bike
- Among the most positive groups about Wi-Fi service
- More likely to work beyond standard Monday-through-Friday, 9 to 5 schedules
- Participants expressed a stronger desire for more frequent schedules
- Participants also expressed concerns about being stranded due to missed transfers with no other alternative.

Reverse Commute Drivers

- Worked in areas with 24/7 or other non-traditional or varied hours
- High number in tech/biotech and related sectors
- Positive comments about the Golden Gate Transit and Golden Gate Ferry web sites
- Preferred Google Maps over 511's Trip Planner
- The additional time to commute by transit was the primary factor most of them drove
- Lack of nearby transit stops on either end of their trip/number of transfers required also key impediments
- Felt Wi-Fi might mitigate some of the additional time required for commuting by transit for some people.
- Indicated additional measures (longer service hours, bus-only freeway lanes) would probably be required in order for them to consider transit.

Thank You