



Dated: December 14, 2010

**ADDENDUM NO. 1**

**REQUEST FOR PROPOSALS (RFP) NO. 2011-BT-2**  
**WIRELESS INTERNET SERVICES ONBOARD GOLDEN GATE TRANSIT BUSES**

To All Prospective Proposers:

The Golden Gate Bridge, Highway and Transportation District (District) herewith issues Addendum No. 1 to the above-referenced Request for Proposals (RFP). Addendum No. 1 is hereby incorporated and made part of the RFP Documents. Except as specifically modified by this document, all other terms and conditions remain in full force and effect.

**RESPONSES TO QUESTIONS FROM POTENTIAL PROPOSERS**

The attached document entitled, "**QUESTIONS AND ANSWERS**," is in response to written inquiries submitted by potential Proposers to the District by the deadline date of Tuesday, December 7, 2010, for RFP No. 2011-BT-2, *Wireless Internet Services Onboard Golden Gate Transit Buses*.

Should you have any questions regarding the above clarifications, please contact Janet S. Tarantino, Secretary of the District, by telephone at (415) 923-2223.

**Proposers shall acknowledge the inclusion of Addendum No. 1 by inserting the Addendum number in the space provided on the Acknowledgment of Addenda of the RFP Documents. Failure to do so may cause the District to deem the proposal as being unresponsive.**

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Janet S. Tarantino  
Secretary of the District

Attachments: Questions and Answers  
Weekly Logins by Location  
Monthly Sessions by Location  
Market Research Study

**REQUEST FOR PROPOSALS (RFP) NO. 2011-BT-2**  
**WIRELESS INTERNET SERVICES ONBOARD GOLDEN GATE TRANSIT BUSES**

**QUESTIONS AND ANSWERS**

Q1	Will the Golden Gate Transit Authority entertain bids that do NOT contain a revenue share provision?
A1	The District is willing to pay for the cost of the equipment necessary to provide the desired Wi-Fi services, which will be the property of the District, in exchange for a share of the online advertising revenue over the life of the contract. While a Proposer may want to submit a proposal that does not allow for a revenue share provision, please note that up to 40 points (of the total 100 possible points) will be awarded based on equipment cost to the District and District advertising revenue share. Thus, a Proposer that does not offer to share revenue with the District would need to provide the equipment at no or little cost to the District in order to earn a large number of points in this evaluation category.
Q2	By what date does the District desire for all 155 buses to be fully equipped and offering Wi-Fi service?
A2	By Mid-2011.
Q3	What format should the RFP response be in? Is it OK to include Powerpoint and/or Excel attachments as necessary?
A3	Proposers must follow the basic format provided under Section 6, <i>Proposal Content</i> , of the RFP. As stated on Section 3.C., <i>Proposal Due Date</i> , Proposers are requested to submit one original, ten (10) hard copies, and two (2) CDs, each containing an electronic PDF copy, of the Proposal to the District.  The attachments provided in the RFP (Attachments A, B, C and F or G, if applicable) must be completed and submitted in the form as provided by the District. It is acceptable to include additional attachments in PowerPoint and/or Excel format.
Q4	Can the Proposer assume that each bus will be available for installation any time the bus is not scheduled for a route? Are there any days and/or times of day, other than those when buses are on routes, that buses will NOT be available for installation?
A4	Buses will be available for installation any time they are not performing scheduled service and not required to be in the maintenance shop for service or repair. Bus availability for onboard equipment installation is generally not an issue, particularly, if the Contractor is flexible with their scheduling and willing to perform installations at multiple locations and on weekends. If installations can only be performed during normal business hours (Monday-Friday, 8 a.m.-4:30 p.m.), then availability will become limited to 5-10 buses per day.
Q5	If proposing different equipment than what is listed in the RFP, does the “approved equal” need to be approved before the RFP response is turned in?
A5	Yes.

Q6	For power to the Wi-Fi equipment box, does the District expect equipment to be powered on even when the transit bus is powered off? If so, please provide available wattage that can be provided by the bus battery.
A6	The District prefers that the onboard equipment is powered only while the bus is in operation.
Q7	<i>“The Contractor may provide a Train-the-Trainer session for District personnel to install the equipment on the District’s buses.”</i> What type and what number of District resources will be available for this training? Can the Proposer assume that only one Train-the-Trainer session will be required?
A7	Should the District choose this option, only one Train-the-Trainer session will be required.
Q8	<i>“The Contractor shall be required to modify the Wi-Fi design on the coach as directed by the District prior to installation of equipment on board the bus fleet.”</i> What types of modifications does the District anticipate? And how will corrections of RF interference be completed if the Proposer uses the Train-the-Trainer approach whereby District personnel conduct most installations?
A8	The District reserves the right to review and approve design and location of on board equipment installation. Requests for design change will only result from conflicts with functionality or access to other vehicle systems and equipment or from design elements that District staff determines not to be compliant with the technical specifications. The District expects the Contractor to work closely with District staff during final design in order to minimize any likelihood of requests for changes.  Should the District choose a Train-the-Trainer session option, it is expected that all five vehicle types will have prototype installations performed and that any RF interference issues will be resolved prior to training of District staff.
Q9	<i>“The Contractor’s design shall have sufficient equipment, performance, and coverage redundancy to preclude any chance of 100% total service failure.”</i> Do you want the Proposer to provide for 100% redundancy in the hardware quote?
A9	Equipment on the bus does not have to be 100% redundant.
Q10	Can you give me any of the stats for users on Wi-Fi for the seven test buses.
A10	Please see attached <i>Weekly Logins by Location</i> and <i>Monthly Sessions by Location</i> .
Q11	Demographics on who your rider is would be helpful.
A11	Please see attached <i>Market Research Study</i> .

# Weekly Logins by Location

Last 36 weeks from 12/09/2010



Prepared for Golden Gate Transit  
Dec 09, 2010 12:29 PM  
Prepared by Wandering WiFi

Locn Group	Locn #	Location Name	03/28	04/04	04/11	04/18	04/25	05/02	05/09	05/16	05/23	05/30	06/06	06/13	06/20	06/27
Golden Gate Transit	628	Golden Gate Transit Bus 628 - San Rafael, CA	4	13	1	1	18	1	24	30	7	15	17	20	29	29
	691	Golden Gate Transit Bus 691 - San Rafael, CA	9	23	13	28	19	45	36	38	32	26	28	22	29	28
	692	Golden Gate Transit Bus 692 - San Rafael, CA		9	32	29	31	21	33	21	43	11	12	14	17	26
	693	Golden Gate Transit Bus 693 - San Rafael, CA	4	41	22	32	38	28	28		28	41	31	22	21	20
	694	Golden Gate Transit Bus 694 - San Rafael, CA		16	32	39	36	19	25	19	6	29	33	48	43	16
	695	Golden Gate Transit Bus 695 - San Rafael, CA	10	28	15	18			31	19	27	12	39	11	33	19
	696	Golden Gate Transit Bus 696 - San Rafael, CA	13	31	20	34	19	40	21	43	25	16	26	26	15	23
<b>Totals for Golden Gate Transit:</b>			40	161	135	181	161	154	198	170	168	150	186	163	187	161
<b>Totals</b>			40	161	135	181	161	154	198	170	168	150	186	163	187	161

Locn Group	Locn #	Location Name	07/04	07/11	07/18	07/25	08/01	08/08	08/15	08/22	08/29	09/05	09/12	09/19	09/26	10/03
Golden Gate Transit	628	Golden Gate Transit Bus 628 - San Rafael, CA	18	33	34	28	42	36	57	32	22	45	40	11		25
	691	Golden Gate Transit Bus 691 - San Rafael, CA	19	36	46	16	19	48	6	27	30	38	22	50	35	27
	692	Golden Gate Transit Bus 692 - San Rafael, CA	28												21	40
	693	Golden Gate Transit Bus 693 - San Rafael, CA	23	20	28	32	30	24	30	11						
	694	Golden Gate Transit Bus 694 - San Rafael, CA	31	17	30	24	29	27	28	34	47	40	31	26	25	37
	695	Golden Gate Transit Bus 695 - San Rafael, CA	25	11	26	40	38	30		25	33	36	24	33	29	31
	696	Golden Gate Transit Bus 696 - San Rafael, CA	26	28	9	39	31	16	13							
<b>Totals for Golden Gate Transit:</b>			170	145	173	179	189	181	134	129	132	159	117	120	110	160
<b>Totals</b>			170	145	173	179	189	181	134	129	132	159	117	120	110	160

Locn Group	Locn #	Location Name	10/10	10/17	10/24	10/31	11/07	11/14	11/21	11/28	12/05	Total
Golden Gate Transit	628	Golden Gate Transit Bus 628 - San Rafael, CA	13	17	25	25				13	9	734
	691	Golden Gate Transit Bus 691 - San Rafael, CA	42	42	25	9						913
	692	Golden Gate Transit Bus 692 - San Rafael, CA	44	50	48	52	52	35	11	34	19	733
	693	Golden Gate Transit Bus 693 - San Rafael, CA										554
	694	Golden Gate Transit Bus 694 - San Rafael, CA	38	42	46	32	21	40	23	41	23	1,093
	695	Golden Gate Transit Bus 695 - San Rafael, CA	31	44	37	34				18	7	814
	696	Golden Gate Transit Bus 696 - San Rafael, CA								1	13	528
<b>Totals for Golden Gate Transit:</b>			168	195	181	152	73	75	34	107	71	5,369
<b>Totals</b>			168	195	181	152	73	75	34	107	71	5,369

# Monthly Sessions By Location

**Golden Gate Transit**



**Report Parameters**

For the Last 11 months  
From 1/1/2010 Through 11/30/2010

**Prepared For**

Golden Gate Transit

Prepared by AirWatch  
Dec 09, 2010 12:26 PM

Locn Group	Locn #	Location	City	ST	1/10	2/10	3/10	4/10	5/10	6/10	7/10	8/10	9/10	10/10	11/10	Total
Golden Gate Transit	694	Golden Gate Transit Bus 694 - San Rafael, CA	San Rafael	CA	134	115	102	128	69	167	104	127	154	169	119	1388
	691	Golden Gate Transit Bus 691 - San Rafael, CA	San Rafael	CA	85	115	138	95	153	119	131	119	147	145	9	1256
	692	Golden Gate Transit Bus 692 - San Rafael, CA	San Rafael	CA	67	122	131	101	119	77	31	0	10	193	154	1005
	695	Golden Gate Transit Bus 695 - San Rafael, CA	San Rafael	CA	88	46	46	75	77	112	104	102	143	146	34	973
	693	Golden Gate Transit Bus 693 - San Rafael, CA	San Rafael	CA	95	117	142	141	87	129	109	95	0	0	0	915
	696	Golden Gate Transit Bus 696 - San Rafael, CA	San Rafael	CA	104	106	105	123	129	95	113	60	0	0	0	835
	628	Golden Gate Transit Bus 628 - San Rafael, CA	San Rafael	CA	21	27	58	38	62	101	122	177	108	80	26	820
<b>Total</b>					594	648	722	701	696	800	714	680	562	733	342	7192



## Executive Summary

The Golden Gate Bridge, Highway & Transportation District has three primary areas of service to the public: Golden Gate Transit bus service, Golden Gate Ferry, and the Golden Gate Bridge. The surveys of all three customer bases revealed important information about District customers' usage, satisfaction, and demographics, as well as potential opportunities for new ridership.

### Golden Gate Transit – Usage and Satisfaction

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#### Usage

**Most Golden Gate Transit users walk to the bus stop and are on their way to work or school.**

- Over half of Golden Gate Transit users (58%) walked all the way to the bus stop prior to boarding their bus, while 22% drove, 11% were dropped off, and 5% bicycled.
- Nearly two-thirds (63%) are commuting to or from work, while 8% are attending a work-related meeting and 5% are going to school.

**More than two-thirds (68%) of Golden Gate Transit riders are 'choice' riders who had other options for making the surveyed trip.**

- If Golden Gate Transit were not available, 40% of riders would drive alone to make the surveyed trip, while another 15% would carpool, which points to Golden Gate Transit's role in reducing traffic congestion.
- Choice ridership varies widely by route – Route 97 has the highest level of choice ridership (90%), while Routes 70/80 have the lowest (49%).

**While 7% of Golden Gate Transit riders had to stand because seating was unavailable, the standing rate on individual routes varied widely.** Route 54 had the lowest rate of individuals standing due to seating unavailability at 1%. By contrast, 13% of Route 70/80 riders had to stand due to a lack of seating.

**Over half (64%) ride Golden Gate Transit buses at least 4 days per week, while another 22% ride Golden Gate Transit at least 1 day per week.**

- Commute routes had a higher percentage of frequent ridership, with 80% riding at least 4 days per week.
- Basic routes had a lower percentage of frequent ridership, with 48% riding at least 4 days per week. However, another 27% of Basic route riders use the bus at least 1 day per week.

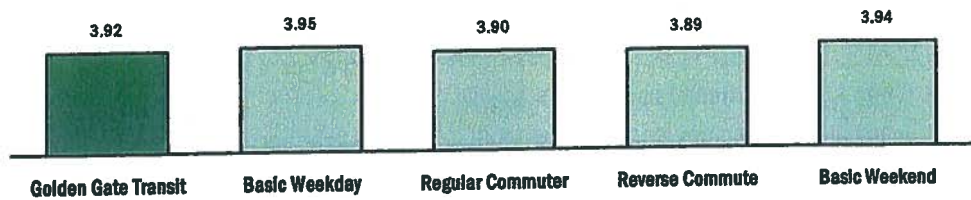
**Over one-fourth (26%) of Golden Gate Transit riders use Golden Gate Ferry at least once a month but less than three times a week.** Related focus group and verbatim comments suggest that some riders switch between bus and ferry based on transit timetables, their own personal schedules, and calendar considerations (e.g. taking the ferry home on Friday afternoon).

## Satisfaction

Bus riders were asked to rate their overall satisfaction with the service on a scale from 1 to 5, with “1” indicating they were very dissatisfied and “5” indicating they were very satisfied.

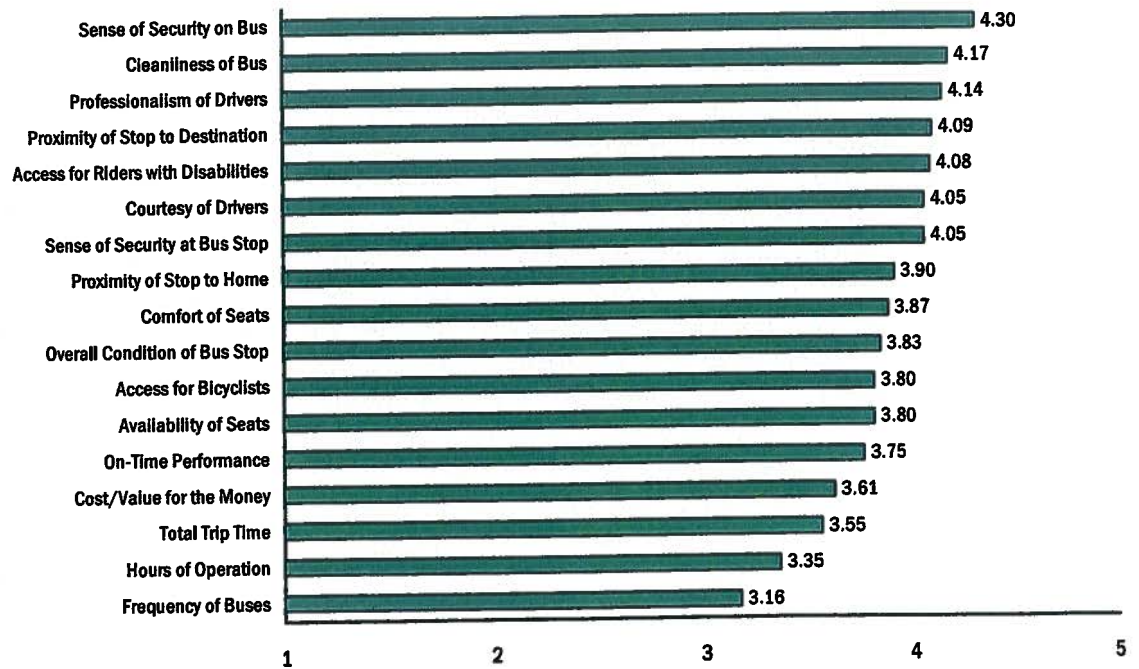
Golden Gate Transit riders rated their overall satisfaction fairly high, 3.92 out of 5.00. This was fairly consistent across major rider sub-groups. By route, satisfaction ratings showed a wider disparity, with Route 74 riders giving an overall satisfaction of 3.61 (the lowest of any route) and Route 18 riders giving an overall satisfaction rating of 4.11 (the highest of any route).

Please rate . . . Q9R. Overall Rating of Golden Gate Transit



Golden Gate Transit riders generally rated security, cleanliness, and driver courtesy and professionalism highly (4.05 or higher) and no attribute received a rating below 3.00.

Frequency of buses (3.16) and hours of operation (3.55) were the two lowest rated attributes, and these attributes were rated consistently lower than other attributes across most routes.



## Golden Gate Ferry – Usage and Satisfaction

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### Usage

**While 76% of ferry riders live in the San Francisco Bay Area, this varies widely by route and day of the week.**

- Sausalito riders are evenly split, with 50% living in the Bay Area and 50% visiting the Bay Area.
- Most Larkspur riders (88%) live in the Bay Area. However, on weekends, only 64% of Larkspur riders live in the Bay Area. During the week, 90% of Larkspur ferry riders are Bay Area residents.

**More than half (52%) of ferry riders are commuting to or from work, with another 7% attending a work-related meeting and 2% going to school. However, this, too, varies widely by route and passenger type.**

- On the Sausalito route, only 34% are traveling for a work or school related purpose, compared to 73% of Larkspur ferry riders.
- Among Bay Area residents, 68% are using the ferry to commute to work, with another 8% attending a work-related meeting and 2% attending school.
- Among visitors to the Bay Area, sightseeing is the primary trip purpose (41%), followed by recreation/entertainment (40%).

**Nearly three-fourths (74%) of ferry riders were coming from home or work prior to embarking on the ferry.**

- On the Sausalito route, only 51% of riders were coming from home or work.
- On the Larkspur route, 85% were coming from home or work.

**Almost half (49%) of ferry riders drive or are dropped off to access the ferry.**

- While 36% of all ferry riders walk to the ferry terminal, nearly half of Sausalito ferry riders (48%) do so.
- Approximately 17% of riders reach the ferry by bicycle (7%) or public transit (10%); however, approximately 29% of Sausalito ferry riders access the ferry using bicycle (12%) or public transit (17%), compared with only 13% of Larkspur ferry riders who bike (6%) or use transit (7%).

**Most ferry passengers (88%) are “choice” riders, in that they have other options for the surveyed trip.**

- Bay Area residents are even more likely to be choice riders, with only 7% saying that Golden Gate Ferry is their only option.
- Among visitors to the Bay Area, 30% say Golden Gate Ferry is their only option.

**More than half of Bay Area residents riding Golden Gate Ferry use it 4 or more days per week.**

An additional 23% use it 1-3 days per week.

**Over half of local Golden Gate Ferry riders (52%) use Golden Gate Transit buses at least occasionally.**

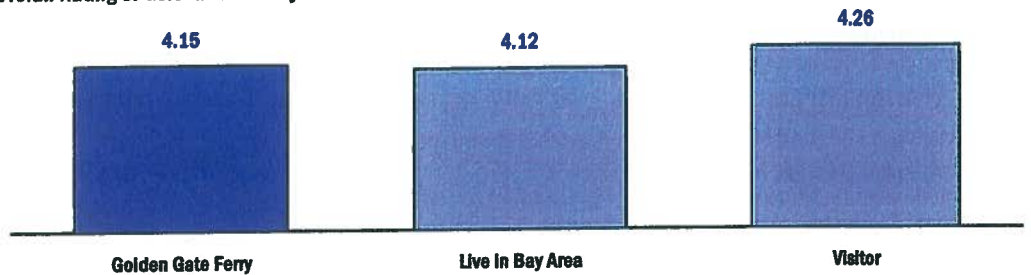
- Nearly one third (28%) use Golden Gate Buses at least once a month.
- Almost half (48%) say they never use Golden Gate Transit buses.

**Satisfaction**

Ferry riders were asked to rate their overall satisfaction with the service on a scale from 1 to 5, with “1” indicating they were very dissatisfied and “5” indicating they were very satisfied. Ferry riders overall gave a rating of 4.15.

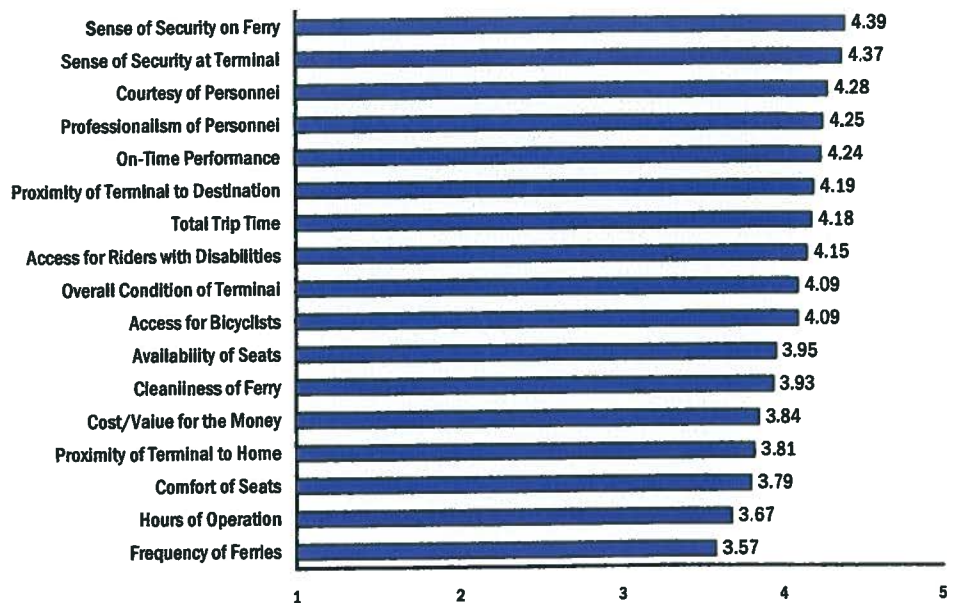
However, there is some variation in this rating. Commonly, new riders of a transit service tend to rate their satisfaction higher than riders who have ridden the service for a longer period. Approximately 24% of Golden Gate Ferry riders are visiting from outside the Bay Area, meaning they are less likely to be frequent riders. This dual role of Golden Gate Ferry is particularly noticed on the Sausalito line, where 51% are visiting from outside the Bay Area. Bay Area residents rated overall satisfaction 4.12, while visitors provided an overall satisfaction rating of 4.26.

Q10R. Overall Rating of Golden Gate Ferry



Satisfaction ratings on individual attributes were quite high, with no individual attribute receiving an overall rating lower than 3.57 out of 5.00. The sense of security at both the terminal and onboard the ferries received the highest marks, followed closely by the professionalism and courtesy of ferry personnel.

The lowest ratings given by riders were for hours of operation (3.67) and frequency of ferries (3.57). Hours of operation was rated particularly lower by Sausalito riders (3.55) than by Larkspur riders (3.72).



## Golden Gate Bridge Drivers - Usage

**Within the prior two weeks, 5% of drivers had used Golden Gate Transit and 8% had used Golden Gate Ferry.**

- Those traveling for work or school, particularly those who telecommute occasionally, are more likely to have used Golden Gate Transit than drivers traveling for other purposes.
- Drivers traveling for shopping or entertainment purposes were more likely to have used Golden Gate Ferry than those traveling for other purposes.

**Drivers who had recently traveled across the Golden Gate Bridge typically do so about twice a week.**

- Those traveling for work-related purposes travel across the Bridge more frequently (about 3 times per week).
- Those who occasionally work from home or telecommute drive across the Bridge roughly four days per week.
- Marin County drivers travel across the Bridge more frequently than Sonoma County residents.

**When asked what they did not like about this drive, 38% said traffic, while 34% cited bridge tolls.**

- About 20% of drivers said there was “nothing” they disliked about the drive.
- A higher percentage of Marin County residents said there was nothing they disliked (22%) than Sonoma County residents (15%).

**When asked what would be needed for them to consider using the bus or ferry for the surveyed trip, over one-fourth (27%) said “Nothing” would make them consider using either the bus or the ferry. However, other top answers included Direct service/express service/infrequent stops (16%), Easy access/door to door service (15%), and More frequent service/less crowded service (12%).**

**Of those driving across the Bridge, 22% were commuting to work, and another 14% were traveling for work-related business. Only 2% were going to school**

- The most common trip purpose was restaurant/entertainment, which was the purpose of 28% of respondents.
- Younger drivers and newer residents were more likely to be traveling for work-related purposes.

**More than half (53%) of drivers were traveling with at least one other person.**

- Drivers traveling for work or school related purposes rarely carpooled, however, with 75% driving alone.
- While 52% of men drove alone, only 43% of women did so.

**The average trip length was 56 minutes.**

- Those traveling for work or school purposes had an average trip length of 53 minutes, while those traveling on personal business had an average trip length of 61 minutes.
- Marin County drivers had an average trip length of almost half that of Sonoma County drivers. Marin County drivers average trip length was 44 minutes, whereas Sonoma County drivers averaged a trip lasting 80 minutes.

**Over one-third (40%) of drivers paid for parking at their destination.**

- A higher percentage of drivers under 55 paid for parking.
- Newer residents were more likely to say they paid for parking, particularly if they lived in their home city fewer than 5 years.
- While only 4% of those paying for parking indicated their company paid for that parking, 11% of drivers earning over \$200,000 said their company paid for parking.

## Focus Groups And Satisfaction

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While quantitative ratings are one measure of the District's customer satisfaction, qualitative focus groups – consisting of 10-13 District customers with similar transportation usage profiles – also help provide a picture of current customer satisfaction and potential future growth.

Nine (9) focus groups were conducted, 2 in July 2008, and the remaining 7 in January 2009. The July focus groups, in addition to providing qualitative input, also helped inform the development of the onboard questionnaires. While each of the nine groups provided different insights, there were common themes among the nine groups that echo the satisfaction ratings from the onboard bus and ferry surveys.

### Primary Motivations for Using Transit

Both riders and non-riders saw using the bus or ferry as part of a larger effort to help reduce the environmental impact of their daily lives. Non-riders and occasional users indicated more of a time bind, and generally weighed the time required to use transit. Both of these considerations, along with the fare paid, contributed to riders' perception of value.

### Staff and Bus/Ferry Cleanliness

Even those who were primarily drivers said that ferry crew and bus drivers were mostly courteous and highly professional. Regular and occasional riders provided accounts of accidents caused by other motorists where the bus driver conducted themselves in a highly competent and professional manner throughout. Ferry riders praised the crews who did thorough jobs, yet still managed to know many regular riders by name or bring coffee to someone on crutches. Drivers and riders alike also noted that buses and ferries are always kept clean, and were generally considered much nicer than other transit systems.

### Wi-Fi

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 very little outright opposition.

### Increased Service

Both riders and non-riders indicated a desire for increased service on **both** Golden Gate Transit and Golden Gate Ferry. Riders cited it as a reason they do not ride more often, while some non-riders indicated it was a drawback to using the bus or ferry. This desire for increased service included:

- Early morning and late evening service during the week;
- Earlier and *much* later service on weekends, particularly Saturday evening; and
- To a lesser extent, users requested more frequent service on weekdays at all hours, keeping wait time to less than 30 minutes (compared to 1 to 1.5 hours in a few instances). When discussing wait time, participants indicated they were considering both the published schedule and unscheduled delays.

### Standing/Overcrowding on Buses

Although the issues of overcrowding and standing-room-only buses were raised in most groups, the July 2008 focus group participants expressed more concern than January 2009 focus group participants did. However, both riders and non-riders indicated that current fares were not a good value if the rider had to stand for most or all of the trip, particularly if the ride was longer.

### Comfort

All riders wanted a comfortable ride, and most said their ride was comfortable.

- 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.
- Bus users gave mixed reviews on comfort.
  - Reverse 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 commuters, 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.

### Bicycling and Transit

Both regular and occasional bus riders tended to view bicycling and transit as going hand in hand, as both are environmentally friendly options. There were at least several bicyclists in every rider group, and bicyclists who rode buses noted that bicycle capacity needed to expand in order to keep up with the growing number of bicyclists. On the other hand, some ferry riders suggested adding a surcharge for those who bring their bikes on board, and some ferry riders expressed frustration with delays caused by heavy bicycle traffic, particularly in the summer on the Sausalito ferry.

### TransLink®

TransLink® was perceived by different constituencies in different ways.

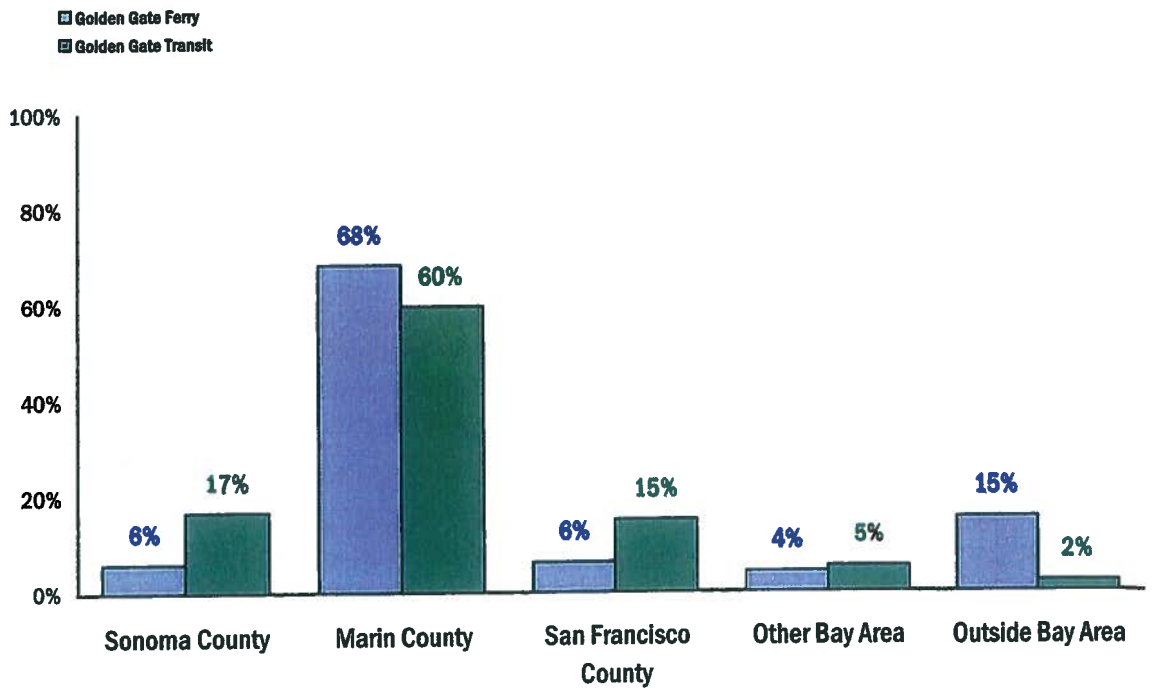
- Generally, regular users were favorable about TransLink®, with ferry riders being the most favorable. Riders cited the convenience of not having to worry about exact change, not having to worry about expiring ticket books, and the ease of use. Some regular bus users, however, indicated that having to tag both when entering and exiting meant that delays occurred as people exited the bus.
- Occasional users were less favorable, and often expressed confusion about TransLink®'s use, reloading, fares, and other basic information. All user groups, however, expressed some frustration with TransLink®. In general, riders wanted more information about TransLink®, from information about how the program works to other places they could use TransLink® and how/where to load additional value using cash instead of credit/debit cards.
- Those who did not have TransLink® were largely unaware of what it was, and somewhat skeptical, but liked the concept of using one card on all transit systems in the Bay Area.

## Who are the Customers of the District?

### Geography

The majority of respondents from the Golden Gate Transit, Golden Gate Ferry, and Golden Gate Bridge\* studies reside in Marin County, with many of the remaining respondents coming from Sonoma County and San Francisco County.

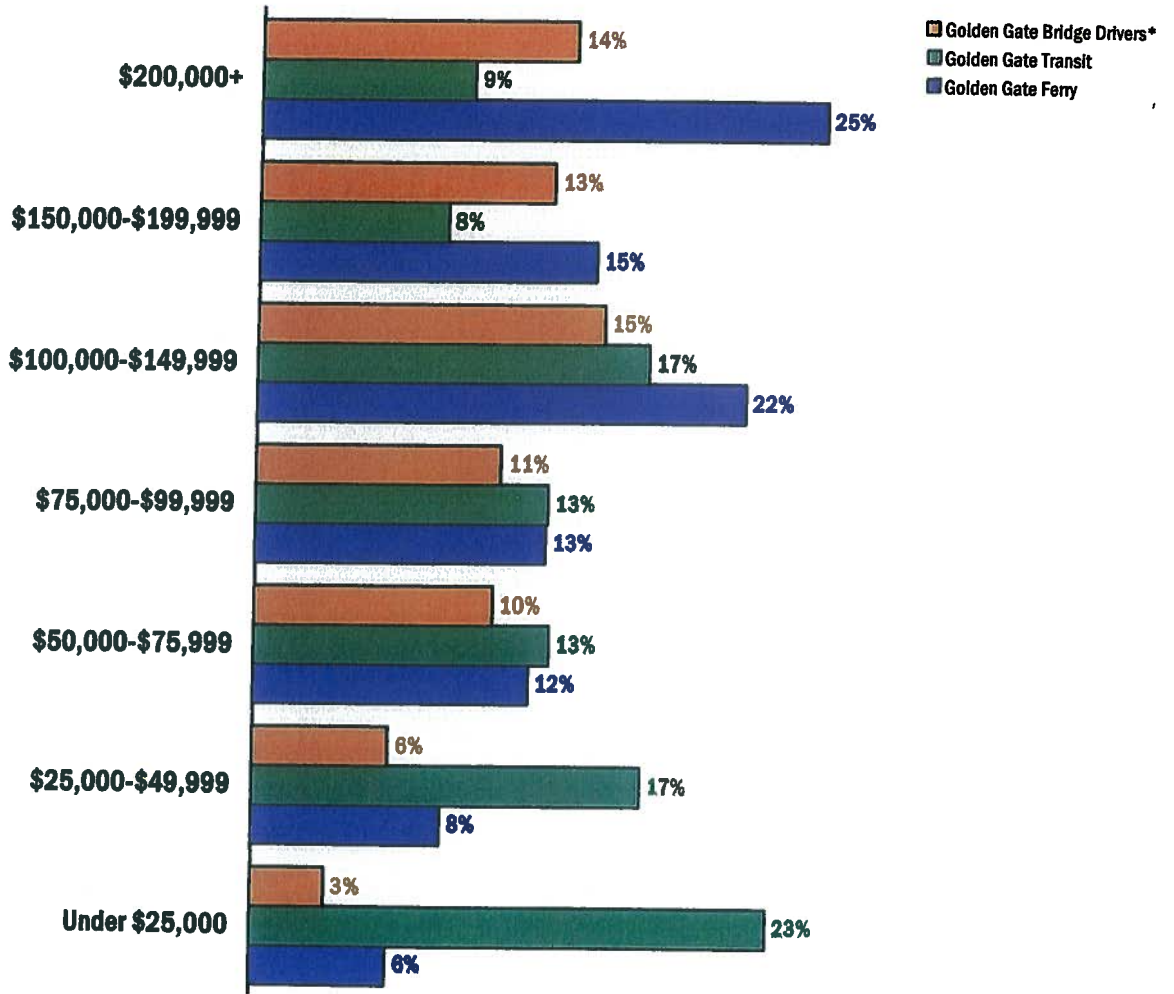
Geographic Distribution - District Customers



\*Note that the Golden Gate Bridge study targeted ONLY residents of Sonoma and Marin counties; therefore, residents of all other Bay Area counties (including San Francisco), as well as those driving across the bridge from other areas, were not included in that study. In order to present an accurate reflection of the geographic spread of the District's customers, geographic data from that study is not reflected in the graph above.

## Income

Golden Gate Ferry users have the highest average household income, \$131,800. When only local ferry riders are considered, the average income rises to \$137,000. Golden Gate Transit riders have the lowest average household income, \$86,920, while Golden Gate Bridge drivers are in between these two rider groups, at \$126,700.



\*For Golden Gate Bridge drivers, residents of Sonoma and Marin counties (only) were surveyed.

When compared to US Census data, ferry riders have an average household income that is more in line with the average Marin County household income. This is not surprising, since about two-thirds of ferry riders come from Marin County. Similarly, the lower Golden Gate Transit and Golden Gate Bridge driver household incomes reflect the larger share of San Francisco and Sonoma County residents who use each service. (San Francisco households were not surveyed for the Golden Gate Bridge telephone survey, and instead, were included in a reverse commuter focus group.)

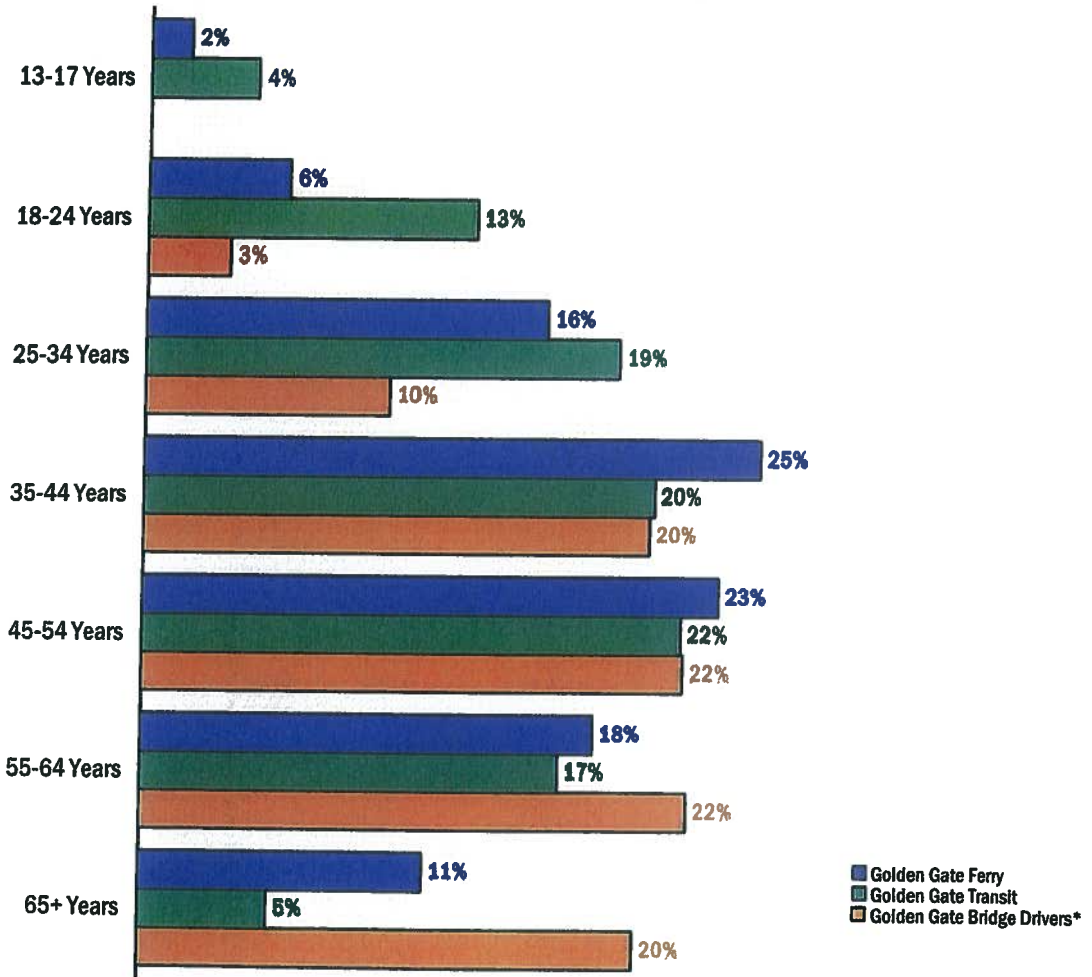
However, those driving the Golden Gate Bridge appear to come from a broader range of households, as percentage by income category was spread relatively uniformly and ranged from 3.2% to 15.2%, but was never the highest in any income category. By contrast, Golden Gate Transit riders had the highest share of households earning less than \$75,000, particularly among riders using Basic transit service, while ferry riders had the highest percentage of households earning \$100,000 or more.

Note that among the three segments, the share of respondents earning \$50,000 to \$99,999 is nearly equal.

<b>Average (Mean) Income – District Customers</b>	
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*
<b>Average (Mean) Income – US Census Data<sup>1</sup></b>	
Marin County	\$124,294
Sonoma County	\$80,437
San Francisco County	\$95,457

## Age

The average Golden Gate Ferry rider is 46 years old, while the average Golden Gate Transit rider is somewhat younger, 42 years old. Golden Gate Transit has a higher share of riders in every category under 35, while Golden Gate Ferry has a higher share of riders among all categories 35 years of age and older.



\* For Golden Gate Bridge drivers, residents of Sonoma and Marin counties aged 18 and above were surveyed. Surveys on Golden Gate Transit and Golden Gate Ferry were distributed only to those appearing to be at least 13 years of age.

While Golden Gate Transit riders have a median age close to that shown in Census data (see below), Golden Gate Ferry riders' mean age is somewhat older. This is true both for ferry riders who live locally and those visiting from outside the Bay Area.

Golden Gate Bridge drivers, however, have the oldest average age, at 51 years. (\*Part of this higher average age is due to the fact that drivers under 18 were not part of the non-rider study, whereas Golden Gate Transit and Golden Gate Ferry riders who appeared to be at least 13 years old were offered a survey.)

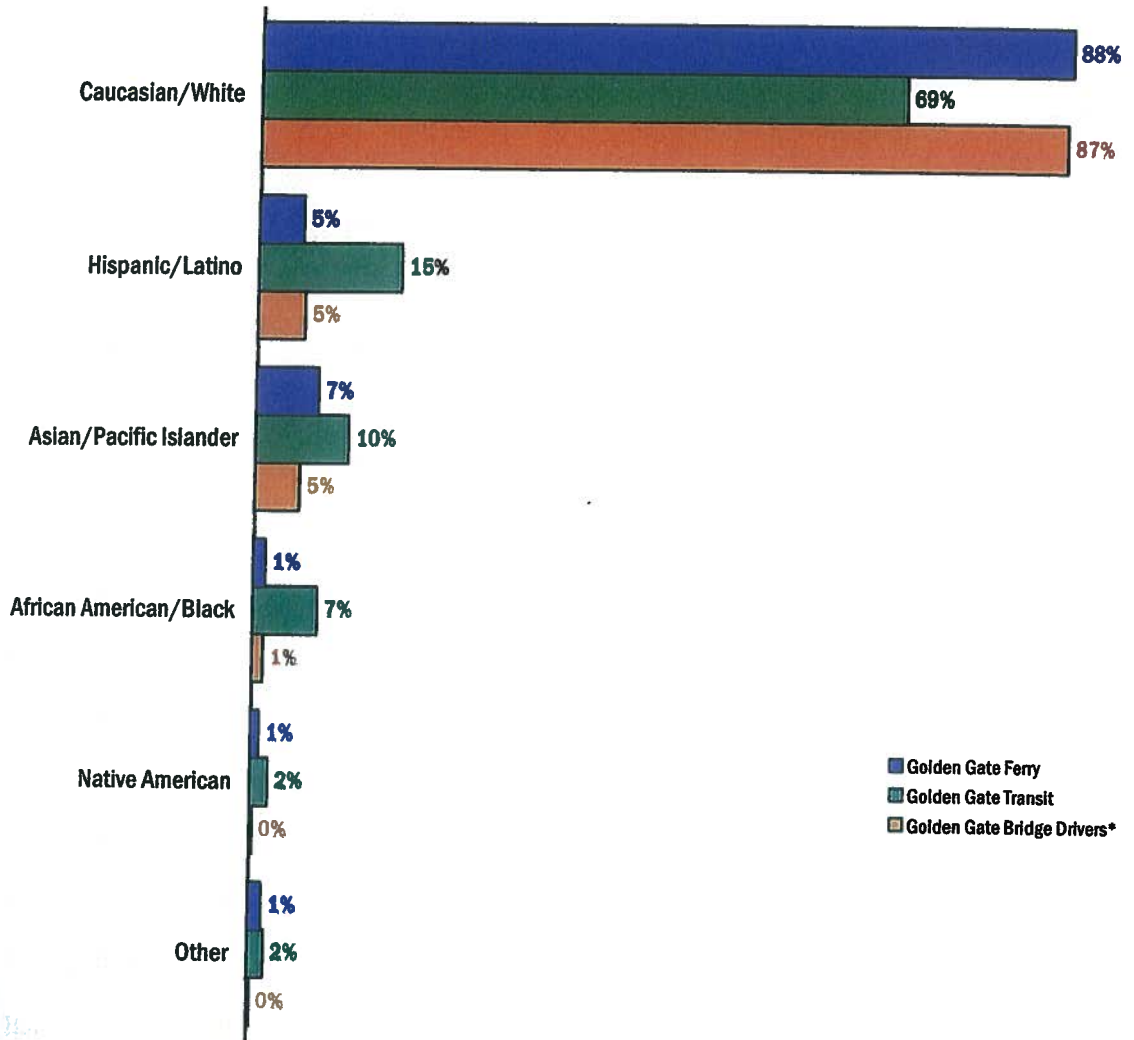
<b>Average (Mean) Age – District Customers</b>	
Golden Gate Ferry	46.4 Years
Golden Gate Ferry – Local	46.0 Years
Golden Gate Ferry – Visitor	47.7 Years
Golden Gate Transit	41.7 Years
Golden Gate Bridge Drivers	51.1 Years*

<b>Average (Mean) Age – US Census Data<sup>2</sup></b>	
Marin County	43.8 Years
Sonoma County	39.1 Years
San Francisco County	39.5 Years

## Race/Ethnicity

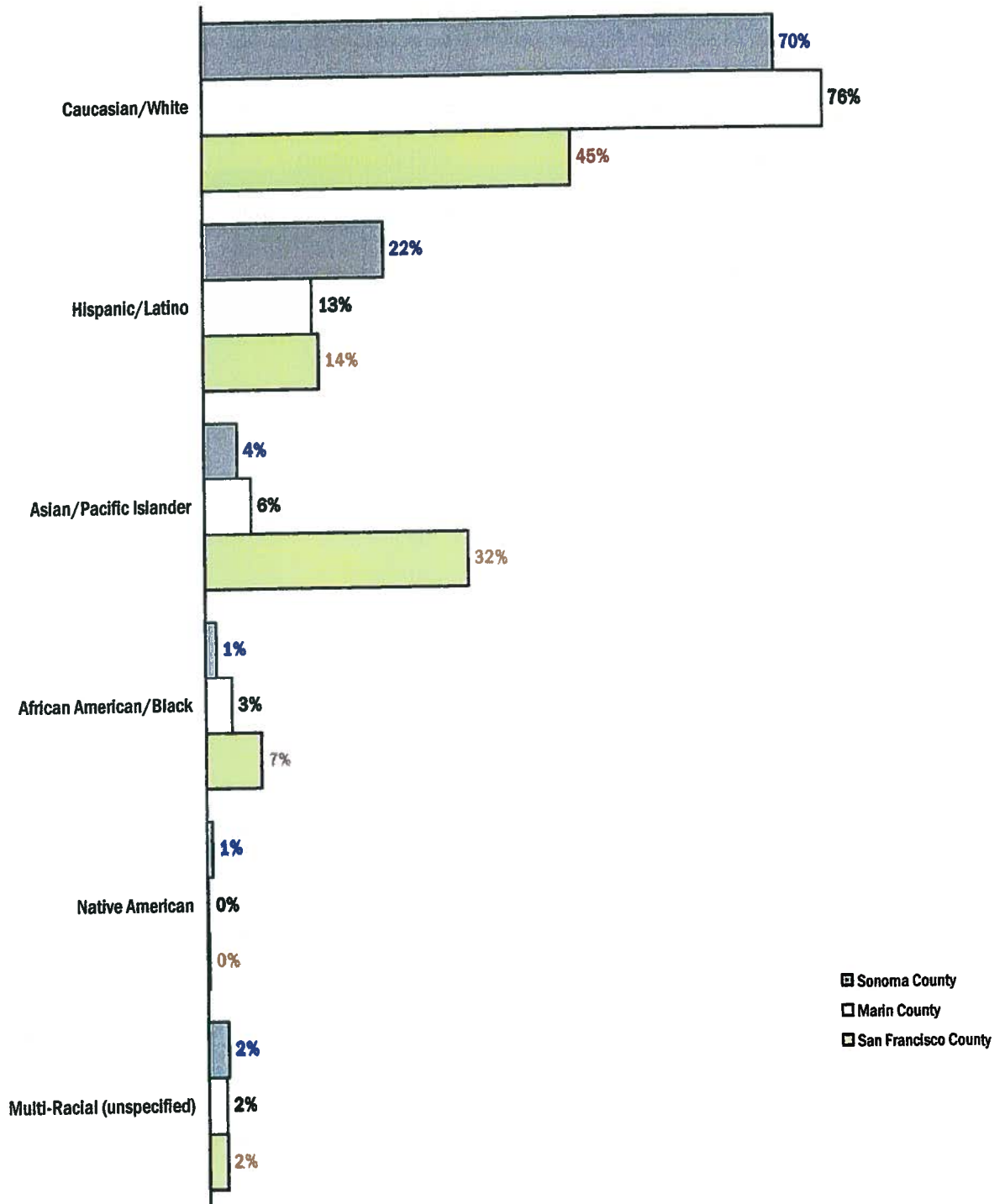
Of the three services provided by the District, Golden Gate Transit has the most diverse ridership. This reflects the larger percentage of Golden Gate Transit riders coming from San Francisco and Sonoma counties when compared with Golden Gate Ferry (which has a predominantly Marin County ridership).

Race/Ethnicity - By Service Used



\*For Golden Gate Bridge drivers, residents of Sonoma and Marin counties (only) were surveyed. Therefore, the racial/ethnic data more closely reflects the US Census data of Sonoma County and Marin County only.

Race/Ethnicity - US Census Data, 2005-2007<sup>3</sup>



## New Riders, Potential Riders, Changing Demographics

A key component of the District's customer surveys is to ascertain not only who its existing customers are and how they view the District's services, but also to understand where potential new riders are likely to exist. This can be done by looking at the newest riders on both Golden Gate Transit and Golden Gate Ferry, as well as the results of the survey of those driving over the Golden Gate Bridge.

While all are examined in more detail, one common theme is evident from all three surveys: That the North Bay's changing demographics may offer the District a unique opportunity to increase ridership among what may have previously been thought of as its non-traditional rider base. Moreover, many of the sentiments expressed by current riders indicate prime opportunities for additional growth.

### Golden Gate Ferry Riders and Growth

Golden Gate Ferry has two primary avenues for ridership growth: An increase in tourists and out of town visitors, and an increase in Bay Area residents as ferry passengers. However, growth in out-of-town ridership is more likely to be determined by broader national and global economic and travel trends.

Increasing the number of Bay Area residents who become ferry riders is more measurable and may also generate more revenue per rider. Most Bay Area residents who use Golden Gate Ferry use it to commute to work or school. Currently, 52% of riders who are Bay Area residents take the ferry at least 4 days per week, compared to only 2% of out of town visitors who take it as frequently.

Focusing on Bay Area residents shows a substantial number are new to the service, with 22% using Golden Gate Ferry less than one year. These New Bay Area riders have unique characteristics, both when compared with all Bay Area ferry riders and with Golden Gate Ferry riders as a whole:

- New Bay Area ferry riders tend to be younger than Bay Area ferry riders, with a majority of New Bay Area ferry riders under the age of 35.
- New Bay Area ferry riders tend to have roughly similar trip purposes as Bay Area ferry riders, with slightly more traveling to attend school.
- New Bay Area ferry riders tend to want the same things as Bay Area ferry riders overall - e.g. greater frequency of ferries and longer operating hours.

The combination of their relative youth, plus roughly similar trip purposes, suggests that there is potential to retain, and increase the number of, these New Bay Area riders. Keeping these New Bay Area riders can be done with much of the same improvement that would also satisfy older, more established Bay Area riders.

However, New Bay Area riders are different from Bay Area riders in several key areas. Rather than the relatively homogenous Marin County/Sonoma County-based ferry commuter, these New Bay Area riders are widely divergent in key ways:

- They are more geographically diverse, with fewer coming from Marin County and more coming from San Francisco, Alameda, Contra Costa, San Mateo, and Santa Clara counties.
- They are more racially diverse than Bay Area ferry riders, reflecting their geographic origins and the diversity of the Bay Area as a whole.

- New Bay Area riders have somewhat lower incomes, and a higher rate of transit dependence, than Bay Area ferry riders overall. However, a lower income does not automatically track with a higher rate of transit dependence when viewing these results by sub-group, suggesting that this is a group that is more transit-positive, and/or choosing not to have a car in order to maintain a higher quality of life in other areas.
- They are not necessarily riding Golden Gate Ferry every day, and on the Sausalito line particularly, are more likely to switch among Golden Gate Ferry, Golden Gate Transit, bicycling, and other transit modes.
- Their ratings of Golden Gate Ferry are higher than Bay Area ferry riders for the most part, save several important attributes which relate to hours, scheduling, and cost. This, and their multiple mode tendencies and geography, suggest these riders may grade such items more critically because they are accustomed to multiple transit agencies, and/or use multiple modes for most trips.

Reaching out to, and increasing the number of, these New Bay Area riders is likely to include an overall approach that takes into account this group's diverse geographic and ethnic backgrounds, as well as their widely varied travel patterns. This may include:

- Casting a wider geographic net, so messaging about promotions, major schedule changes/delays, and other events is not focused solely on a Marin/Sonoma-based audience.
- Making announcements with a wider time-frame and encouraging more riders to subscribe to email or text messages, so that riders who do not take the ferry every day (but at least once a week) are aware of important updates.
- Promoting TransLink as the one-stop ticket, particularly as other agencies begin using TransLink, so New Bay Area riders – even those riding casually or once or twice a week -- know they can use one payment mode across multiple transit agencies. This will be important from both a cost perspective as well as a convenience standpoint.

### New Golden Gate Ferry Riders by Age

New Bay Area riders are younger, with an average age of 37.5 years (compared with 46.0 years among all Bay Area riders and 46.4 years among all ferry riders). Half of new Bay Area ferry riders are under the age of 35, while just 11% are over 55. Conversely, 27% of all Bay Area ferry riders are over 55, and only 21% are under age 35.

	All Ferry Riders	Bay Area Riders	New Bay Area Riders		
			Total	Larkspur	Sausalito
Base	3919 (%)	2905 (%)	631 (%)	475 (%)	157 (%)
Under 18^	2	1	2	2	3
18-24 Years	6	5	15	16	11
25-34 Years	16	15	33	30	41
35-44 Years	25	27	24	26	21
45-54 Years	23	25	14	15	13
55-64 Years	18	18	9	8	9
65 and Older	11	9	3	4	1
<b>Average Age (Years):</b>	<b>46.4</b>	<b>46.0</b>	<b>37.5</b>	<b>37.8</b>	<b>36.7</b>

^Note: Survey included those aged 13-18; riders under 12 were not included.

### New Golden Gate Ferry Riders, Income, and Mode Choice

In addition, new Bay Area riders make somewhat less than their older, longer-riding counterparts. While two-thirds of all Bay Area ferry riders earn \$100,000 or more, fewer than half of new Bay Area riders earn this much. And, twice as many new Bay Area riders earn less than \$50,000 (22%) than Bay Area riders as a whole (11%).

Similarly, 15% of New Bay Area riders say the reason they take the ferry is, "Don't have a car/don't drive" (See Q12.). On the Sausalito route, 22% of New Bay Area riders give this reason for riding. However, the Sausalito route also had the highest average income (\$115,000) among new Bay Area riders.

	All Ferry Riders	Bay Area Riders	New Bay Area Riders		
			Total	Larkspur	Sausalito
Base	3919 (%)	2905 (%)	631 (%)	475 (%)	157 (%)
Under \$25,000	6	4	11	11	10
\$25,000-\$49,999	8	7	11	11	11
\$50,000-\$74,999	12	11	16	16	16
\$75,000-\$99,999	13	12	13	13	10
\$100,000-\$149,999	22	23	20	20	22
\$150,000-\$199,999	15	16	13	11	17
\$200,000 or More	25	27	16	17	15
<b>Average (\$,000)</b>	<b>\$131.8</b>	<b>\$137.0</b>	<b>\$111.8</b>	<b>\$110.8</b>	<b>\$115.0</b>
<b>Q12. Reason for riding is "Don't have a car/don't drive" (%)</b>	<b>10%</b>	<b>9%</b>	<b>15%</b>	<b>12%</b>	<b>22%</b>

### New Golden Gate Ferry Riders and Race/Ethnicity

New Bay Area riders are more diverse than both Bay Area riders and Golden Gate Ferry riders as a whole. While 88% of all Golden Gate Ferry riders are white, and 89% of Bay Area riders are white, only 82% of New Bay Area riders (and only 79% of Sausalito ferry riders) are white.

New Bay Area riders are nearly twice as likely to be Asian (11% vs. 6% for all Bay Area riders). Similarly, New Bay Area riders on the Larkspur route are nearly twice as likely to be Hispanic as Bay Area ferry riders as a whole (7% vs. 4%).

	All Ferry Riders	Bay Area Riders	New Bay Area Riders		
			Total	Larkspur	Sausalito
Base	3919 (%)	2905 (%)	631 (%)	475 (%)	157 (%)
Caucasian/White	88	89	82	84	79
Asian/Pacific Islander	7	6	11	10	14
Hispanic/Latino	5	4	6	7	5
African American/Black	1	1	2	2	1
Native American/Other Native	1	1	1	1	2
Middle Eastern	<1	<1	-	-	-
Indian/Pakistani	<1	<1	-	-	-
Multi-racial/Other Unspecified	1	1	1	<1	1

### New Golden Gate Ferry Riders and Home Location

Newer Bay Area riders are less likely to come from Marin County, and more likely to come from San Francisco County as well as counties in the East Bay and South Bay.

While only about 12% of Bay Area riders come from outside Marin or Sonoma County, 23% of New Bay Area riders come from one of the remaining seven Bay Area counties. This trend is more pronounced on the Sausalito line, where 23% of New Bay Area riders live in San Francisco County, and another 14% come from Alameda, Contra Costa, San Mateo, and Santa Clara counties. Similarly, the Larkspur route pulls 2% of New Bay Area riders from Solano and Napa counties.

	All Ferry Riders	Bay Area Riders	New Bay Area Riders		
			Total	Larkspur	Sausalito
Base	3919 (%)	2905 (%)	631 (%)	475 (%)	157 (%)
Marin County	68	81	71	75	59
Sonoma County	6	6	6	8	-
San Francisco County	6	7	12	8	23
Alameda County	1	1	3	2	4
Contra Costa County	1	2	3	2	3
San Mateo County	1	<1	1	<1	2
Santa Clara County	<1	1	2	<1	5
Solano County	<1	<1	1	1	-
Napa County	<1	<1	1	1	-

### New Golden Gate Ferry Riders and Trip Purpose

Newer Bay Area riders tend to ride for the same reasons as Bay Area residents as a whole, with New Bay Area riders on the Sausalito route more likely to travel by ferry for recreational reasons. However, 60% of New Bay Area riders on the Sausalito route are travelling for a work or school related purpose.

When comparing Newer Bay Area riders to Bay Area riders overall, the percentage commuting to work or school is about the same, with slightly fewer New Bay Area riders commuting to work, but slightly more of them commuting to school. So, while 78% of Bay Area riders, overall, are riding for work or school related purposes, so, too, are 76% of Newer Bay Area riders.

	All Ferry Riders	Bay Area Riders	New Bay Area Riders		
			Total	Larkspur	Sausalito
Base	3919	2905	631	475	157
	(%)	(%)	(%)	(%)	(%)
Commute To/From Work	52	68	64	68	53
School	2	2	5	6	1
Work-Related Event/Meeting	7	8	7	7	6
Recreation/Entertainment	19	12	13	10	21
Sightseeing	12	3	5	4	9
Restaurant/Eat Out	1	<1	<1	-	1
Visit Friends/Family	6	5	5	5	7
All Other	6	5	5	4	7

### New Golden Gate Ferry Riders and Ferry Usage

Newer Bay Area riders were slightly more likely to ride the ferry 6-7 days a week than Bay Area riders as a whole; however, they were also more likely to ride the ferry less than once a month or not at all. This trend is particularly notable on the Sausalito route.

Conversely, Sausalito riders who are New Bay Area riders were more likely to say they rode Golden Gate Transit on a regular basis, with 36% indicating they ride the bus at least once a month. This suggests that New Bay Area riders on the Sausalito route, particularly, may switch back and forth between ferry and bus based on transit schedules, personal commitments, time of day/week, weather, and other factors. This is in line with input from reverse commuters during focus groups, who indicated they alternate between Golden Gate Ferry and Golden Gate Transit for commuting and other regularly planned trips.

#### Q11. How often do you [normally] use . . . Golden Gate Ferry?

	All Ferry Riders	Bay Area Riders	New Bay Area Riders		
			Total	Larkspur	Sausalito
Base	3919 (%)	2905 (%)	631 (%)	475 (%)	157 (%)
6-7 Days a Week	2	3	5	4	8
4-5 Days a Week	39	49	47	52	33
2-3 Days a Week	13	17	15	15	15
1 Day a Week	5	6	6	6	5
1-3 Days a Month	8	9	5	5	6
Less than once a Month	21	14	16	13	26
Never	12	2	7	6	9

#### Q11. How often do you [normally] use . . . Golden Gate Transit Buses?

	All Ferry Riders	Bay Area Riders	New Bay Area Riders		
			Total	Larkspur	Sausalito
Base	3919 (%)	2905 (%)	631 (%)	475 (%)	157 (%)
6-7 Days a Week	1	1	2	2	2
4-5 Days a Week	6	8	6	5	10
2-3 Days a Week	5	7	4	3	7
1 Day a Week	4	5	3	2	6
1-3 Days a Month	7	8	6	4	11
Less than once a Month	23	24	20	20	21
Never	55	48	59	64	43

### New Golden Gate Ferry Riders and Fare Payment

New Bay Area riders on the Larkspur route have very similar fare payment patterns as Bay Area riders overall, with 72% of New Bay Area riders on the Larkspur route using some form of discounted fare payment.

While only 58% of New Bay Area riders on the Sausalito route use some discounted form of fare payment, there may be several reasons for this. The most obvious reason is that the Sausalito route attracts more recreational riders, who may be using the ferry only for that particular day (and are more likely to find TransLink inconvenient when they are traveling in groups – See Focus Group section).

However, both qualitative and quantitative results suggest riders on the Sausalito route may be more likely to switch between the bus and the ferry. They appear somewhat more likely to bike in one direction and take the ferry in the other direction as well.

	All Ferry Riders	Bay Area Riders	New Bay Area Riders		
			Total	Larkspur	Sausalito
Base	3919 (%)	2905 (%)	631 (%)	475 (%)	157 (%)
Regular Ticket	42	25	31	27	41
TransLink	36	46	43	45	35
Frequent Rider Ticket*	21	28	26	27	23
All Other	1	1	1	1	1

\*Frequent rider ticket from a ticket book; active during the time of the study, these have since been discontinued.

### New Golden Gate Ferry Riders and Satisfaction

New Bay Area riders are happier with many aspects of Golden Gate Ferry, and they rated overall satisfaction somewhat higher than Bay Area riders as a whole.

However, there are a number of attributes New Bay Area riders, or major subgroups of them, rated lower than Bay Area riders. These attributes, highlighted below, largely emphasize this group's diverse geographic spread, increased transit dependency, and somewhat lower incomes.

	All Ferry Riders	Bay Area Riders	New Bay Area Riders		
			Total	Larkspur	Sausalito
Base	3919	2905	631	475	157
	(%)	(%)	(%)	(%)	(%)
How close terminal is to my house	3.81	3.85	3.87	3.88	3.84
How close terminal is to my destination	4.19	4.21	4.13	4.13	4.12
Sense of security at ferry terminals	4.37	4.39	4.40	4.39	4.44
Overall condition of ferry terminals	4.09	4.06	4.14	4.12	4.21
Professionalism of ferry personnel	4.25	4.24	4.32	4.29	4.40
Courtesy of ferry personnel	4.28	4.28	4.33	4.30	4.44
Cleanliness of ferry	3.93	3.87	3.97	4.00	3.87
Comfort of ferry seats	3.79	3.71	3.82	3.79	3.92
Availability of seats on ferry	3.95	3.82	3.96	3.78	4.51
Sense of security on the ferry	4.39	4.39	4.43	4.40	4.49
On-time performance of ferries	4.24	4.23	4.34	4.42	4.09
Hours of operation	3.67	3.58	3.52	3.59	3.29
Total trip time	4.18	4.15	4.11	4.08	4.19
Frequency of ferries	3.57	3.48	3.39	3.44	3.24
Cost/value for the money	3.84	3.80	3.73	3.75	3.66
Access for riders with disabilities	4.15	4.08	4.14	4.12	4.18
Access for bicyclists	4.09	4.01	4.04	4.01	4.14
Overall rating of Golden Gate Ferry	4.15	4.12	4.15	4.15	4.16

## The Newest Golden Gate Bus Riders

Notably, 25% of Golden Gate Transit riders, overall, have been using the service less than one year. Among various service time periods, Reverse commuters and Weekend Basic riders are more likely to be new riders (both with 31% riding less than one year), as are Basic Weekday riders (32%). Among Commute routes, however, only 18% are new riders.

By route, Routes 40/42 and 70/80 have new ridership rates of 32%. Comparatively, only about 12% of riders on Routes 18 and 24 are new riders, and only 10% of riders on Route 38 are new riders. Route 97 has the lowest new ridership rate of any route, at 7%.

In addition, Golden Gate Transit riders who have been riding less than one year:

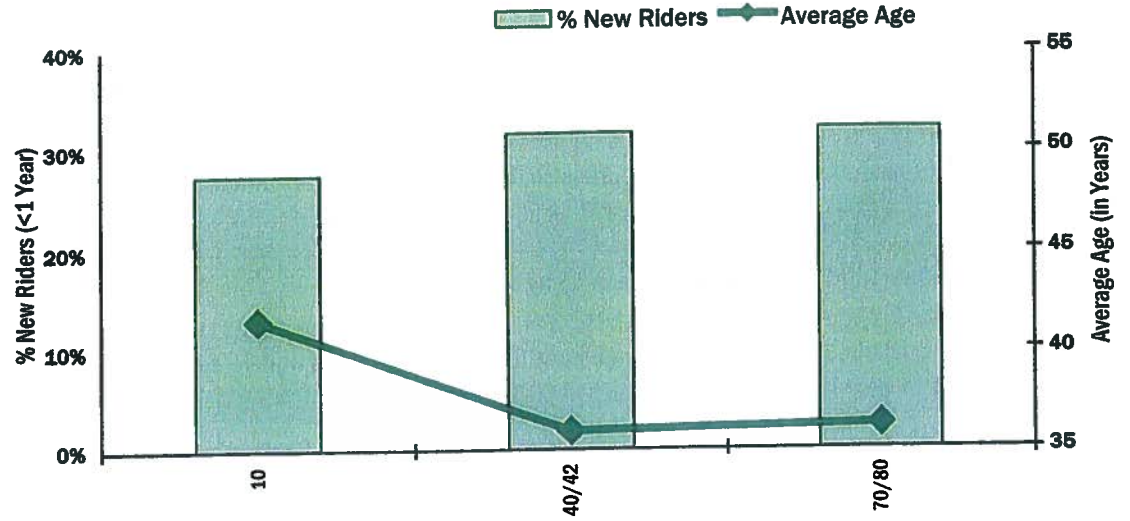
- Are somewhat less likely to be commuting to a job (53%), and more likely to be going to school (7%) or on a social or recreational trip. They are also somewhat more likely to be going to a work-related event outside of a regular job (10% for new riders vs. 8% for all riders and 7% for riders who have been riding 10 or more years);
- Are more likely to be off-peak or weekend users of Golden Gate Transit;
- Are more likely to pay a full cash fare than other users of Golden Gate Transit;
- Are more likely to never use Golden Gate Ferry (49% for new users vs. 36% for all Golden Gate Transit users);
- Cite “Don’t have a car/don’t drive” more often as a reason for using Golden Gate Transit (47% vs. 40% for all Golden Gate Transit users);
- Are younger than other Golden Gate Transit users (with an average age of 34.3 years for new riders vs. 41.7 years for all riders);
- Earn less than other Golden Gate Transit riders (\$73,440 for new riders vs. \$86,920 for all riders); and
- Include more Asian riders (14% for new riders vs. 10% for all riders) than other Golden Gate transit users, and account for a greater share of Hispanic, Asian, and Black users compared to riders who have been using Golden Gate Transit 10 years or more.

In addition, new riders account for a smaller share of riders coming from Marin County and a higher share of riders coming from Sonoma County and San Francisco County, as well as (to a lesser extent) Alameda, Contra Costa, Santa Clara, or San Mateo County.

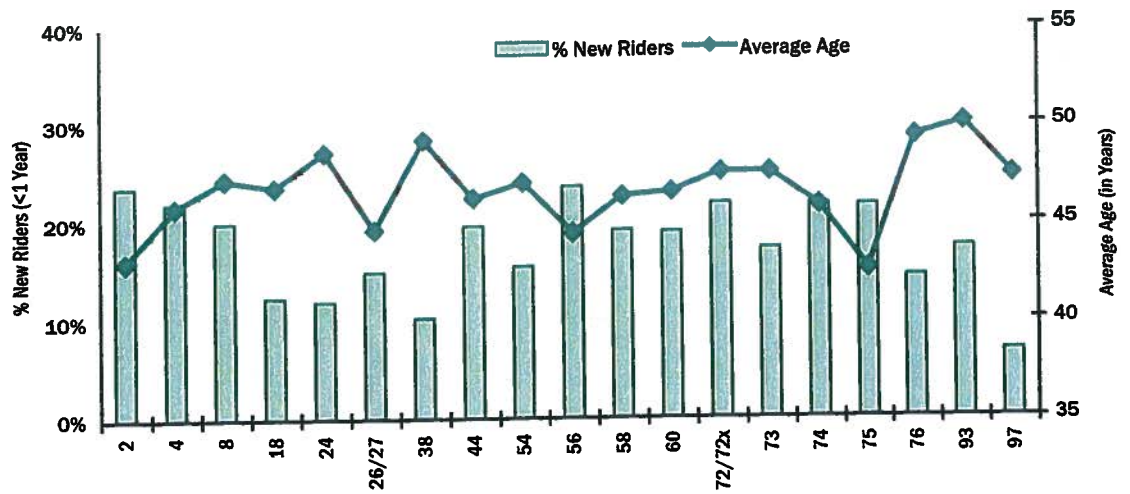
The charts on the following pages show the correlation, by route, of new ridership to income and age.

**Age, Income, and New Ridership Among Bus Riders – Route by Route Comparison**

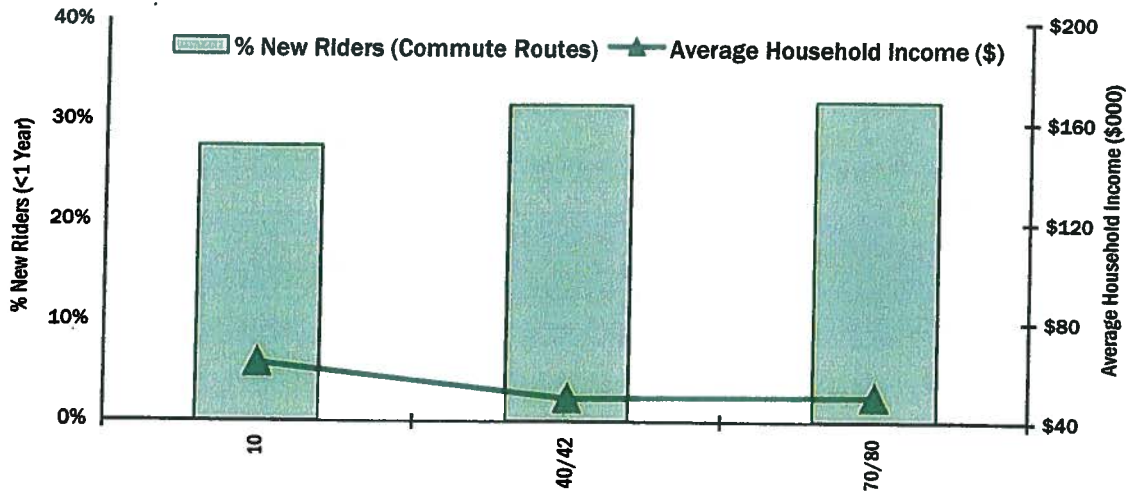
**New Riders and Average Age – Basic Routes**



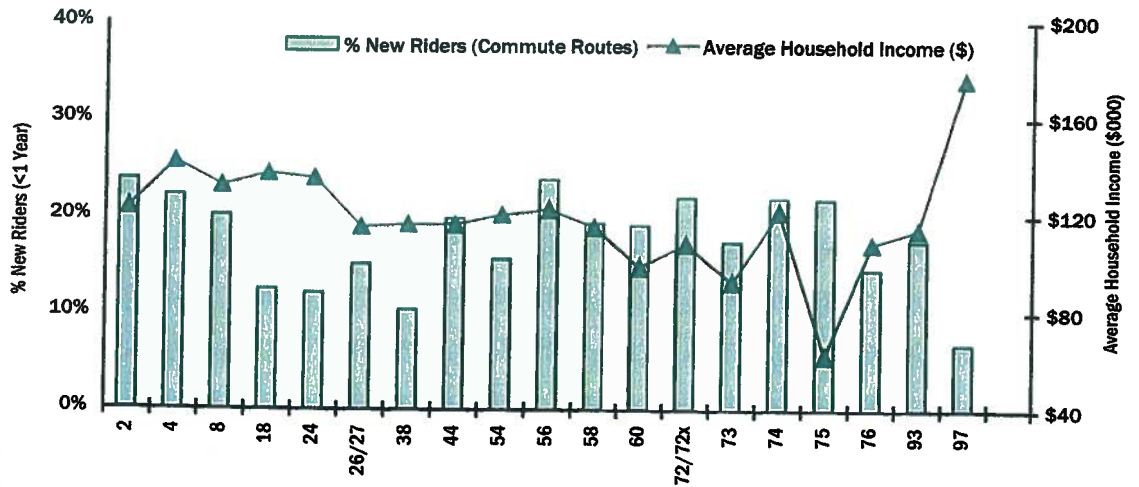
**New Riders and Average Age – Commute Routes**



**New Riders and Average Income - Basic Routes**

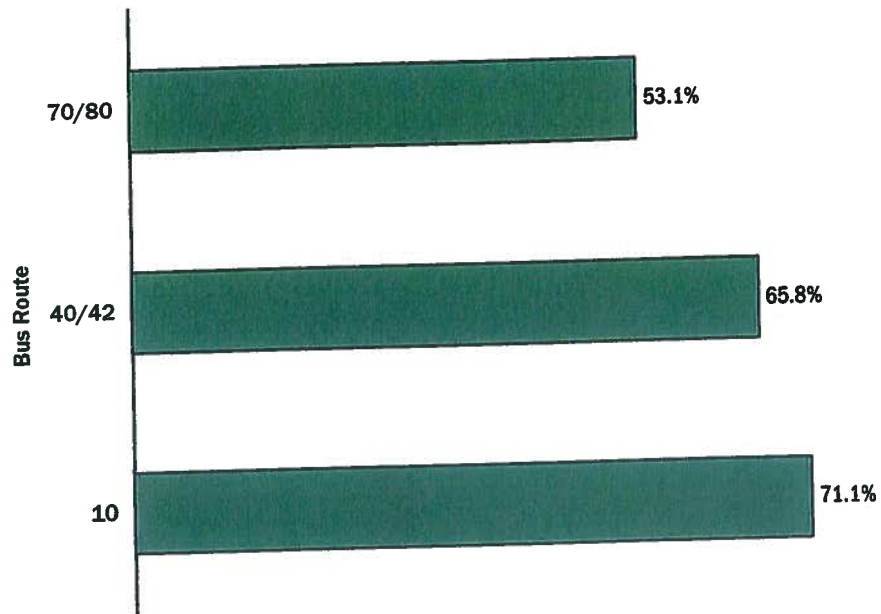


**New Riders and Average Income - Commute Routes**



**Work/School Trips - Basic Routes**

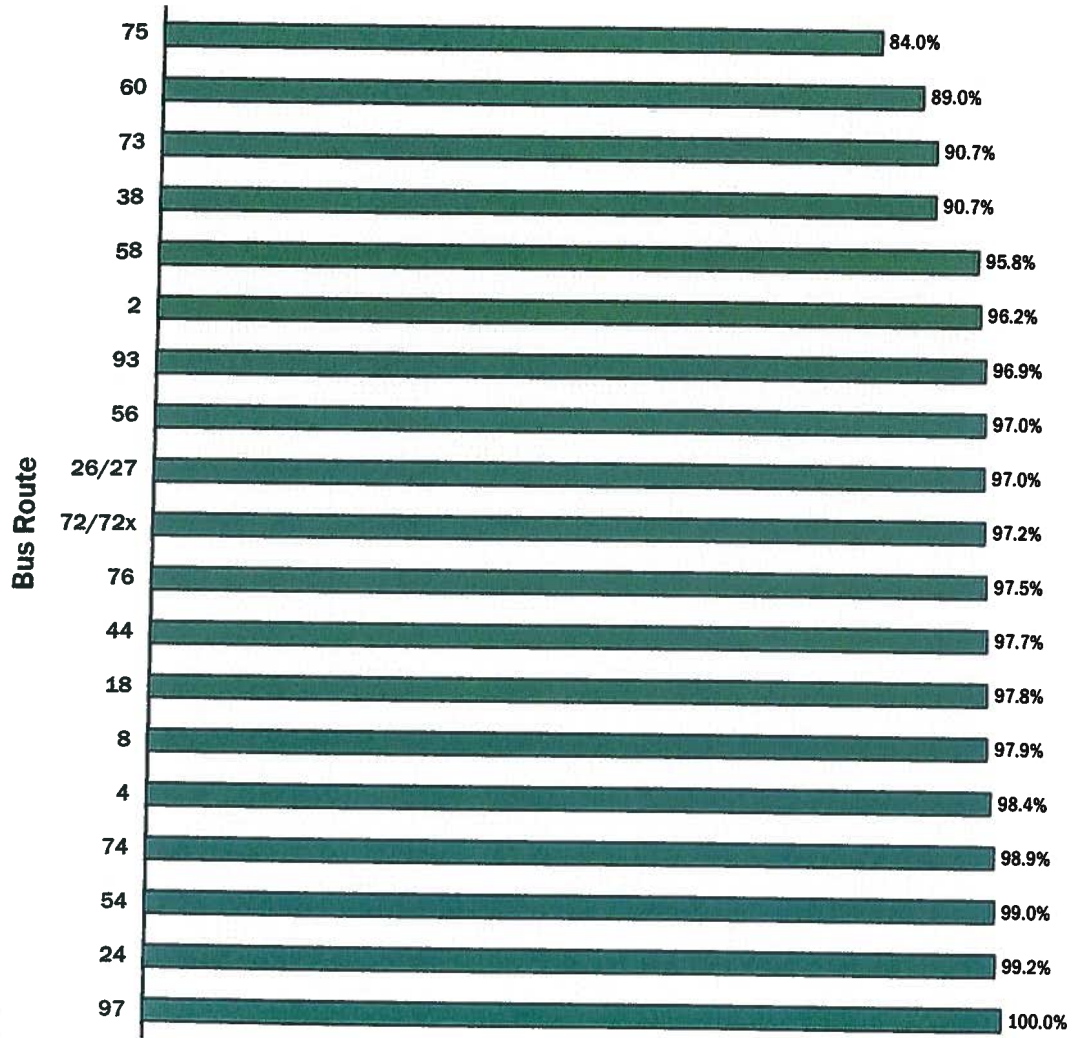
Percentage of respondents who answered Q4, "What is the purpose of your trip today?" by "Commuter to/from work," "Work-related event/meeting," or "School"



**Multiple responses accepted.**

**Work/School Trips - Commute Routes**

Percentage of respondents who answered Q4, "What is the purpose of your trip today?" by "Commute to/from work," "Work-related event/meeting," or "School"



Multiple responses accepted.

## The Non-Rider Survey and New Rider Potential

The Non-Rider survey asked attitudinal and demographic questions of adults who had driven across the Golden Gate Bridge within the prior two weeks and who lived in either Marin or Sonoma County. In addition to gauging drivers' attitudes about the Golden Gate Bridge, the non-rider survey sought to determine a) which driver sub-groups would be most likely to try transit, and b) what motivating factors could be used to attract such drivers to transit.

Similar to the onboard Golden Gate Transit and Golden Gate Ferry studies, the non-rider survey found that the best potential for new riders may come from those who:

- Generally earn less than current riders (or residents as a whole);
- Are younger than other drivers; and
- Are more likely to work or telecommute at least one day out of every 1-2 weeks.

When asked, on a scale of 1 to 4, how likely they would be to consider transit for the surveyed trip across the Golden Gate Bridge, drivers with high or very low incomes tended to be somewhat more likely to consider using the bus or ferry than those in moderate/middle income ranges. Those earning less than \$50,000 rated their likelihood to consider transit at 1.75, while those with income in the moderate range (e.g. \$75,000 to \$100,000), rated this at 1.66. Those earning \$100,000 to \$200,000 were most likely to consider transit among all income brackets (1.90).

The moderate/middle income earners (\$75,000 to \$100,000) were particularly sensitive to any statement that might include additional time. Their reaction to the various travel-related statements indicated a severe time bind, as well as a concern over cost.

By age, those under 45 were more likely to consider transit than older respondents; those 65 and older were least likely to consider transit. In general, the older a driver was, the less likely they were to consider transit. Similarly, the longer a person had resided in their home city, the less likely they were to consider transit.

Trip length had very little impact on whether a person would consider transit or not unless the trip was more than 90 minutes. Drivers with trips of this length were somewhat less likely (1.59, on a scale of 1 to 4) to consider transit. Drivers with trip lengths 60-89 minutes were most likely to consider transit (1.81, on a scale of 1 to 4).

### Motivations for Using Transit

Drivers were asked what amenities or features might motivate them to try transit. Overwhelmingly, the answers they provided dovetail closely with the answers provided by current users from the onboard surveys, and the potential for attracting new users appears to fall along lines similar to existing ferry and bus users.

More direct/express service, easy access/door to door service, and more frequent service were the most commonly cited motivations that would attract drivers to bus or ferry service. Overall, drivers with longer trips (including Sonoma County drivers) were more likely to indicate a need for express service, limited stops, or other factors that would get them to their destination quickly. Drivers with shorter trips (including Marin County drivers) were more likely to indicate a need for closer bus stops, extended hours, and less crowded buses.

However, two key factors were significantly more important to some driver sub-groups:

- “Access to information . . .” was generally cited by about 3% of drivers. However, among drivers earning less than \$50,000, 10% cited this as something that could attract them to use bus or ferry service. Similarly 8% of renters cited this as a possible motivation to use transit for the surveyed trip.
- While 5% of respondents said making transit more affordable/cost-effective was a motivating factor, 10% of those under the age of 35 and 9% of those earning \$50,000 to \$75,000 said this was a motivating factor. These responses indicate that cost considerations are much more important for those in moderate income groups – even more so than those earning less.

Given drivers’ lack of awareness about TransLink (the primary mode of discounted travel on the bus and ferry), as well as a large indication by many transit-oriented sub-groups that they do not have enough information about transit, this suggests that targeting the following key sub-groups with information about schedules, stops/terminals, fare options, and TransLink would be particularly productive:

- Drivers under 35 years of age;
- Drivers earning less than \$100,000;
- Drivers who hold non-traditional jobs, or telecommute; and
- Hispanic drivers.

While Hispanic drivers were approximately 5% of those surveyed, they accounted for 18% of those under the age of 35. Within Sonoma County, this is even more pronounced, with Hispanics accounting for 8% of Sonoma County drivers, but 24% of Sonoma County drivers under the age of 35. Also, Hispanic drivers in Sonoma County account for 17% of drivers who have lived in the area under 5 years. With younger drivers being more open to considering transit, while also indicating a greater need for transit information, this underscores the need for additional outreach to this particular group.

For moderate income earners (\$50,000 to \$100,000), emphasizing speedier transit options and discounted fares (such as through TransLink) will be particularly important.

<sup>1</sup> All Census data is from the US Census Bureau, American FactFinder/American Community Survey Demographic and Housing Estimates: 2005-2007. See <http://factfinder.census.gov> for more information. Census data includes all households, whereas onboard surveys include 13 and over and non-rider telephone survey data was among drivers 18 years of age and over who had driven across the Golden Gate Bridge during the prior two weeks.

<sup>2</sup> All Census data is from the US Census Bureau, American FactFinder/American Community Survey Demographic and Housing Estimates: 2005-2007. See <http://factfinder.census.gov> for more information. Census data includes all ages, whereas onboard surveys include 13 and over and non-rider telephone survey data was among drivers 18 years of age and over who had driven across the Golden Gate Bridge during the prior two weeks.

<sup>3</sup> The US Census counts race differently than surveys of the three District services. In US Census data, Hispanic ethnicity is counted separately from racial data. Therefore, what is shown here are the percentage of those saying they were Hispanic (of any race), plus all the race of all those saying they were non-Hispanic. This most closely approximates the methodology of the surveys. See the Appendix for additional details on data collection.



# Section 1: Golden Gate Transit Onboard Study Results

