



STATUS REPORT ON GOLDEN GATE TRANSIT BUS AND GOLDEN GATE FERRY RIDERSHIP TRENDS AND WHERE WE ARE TODAY



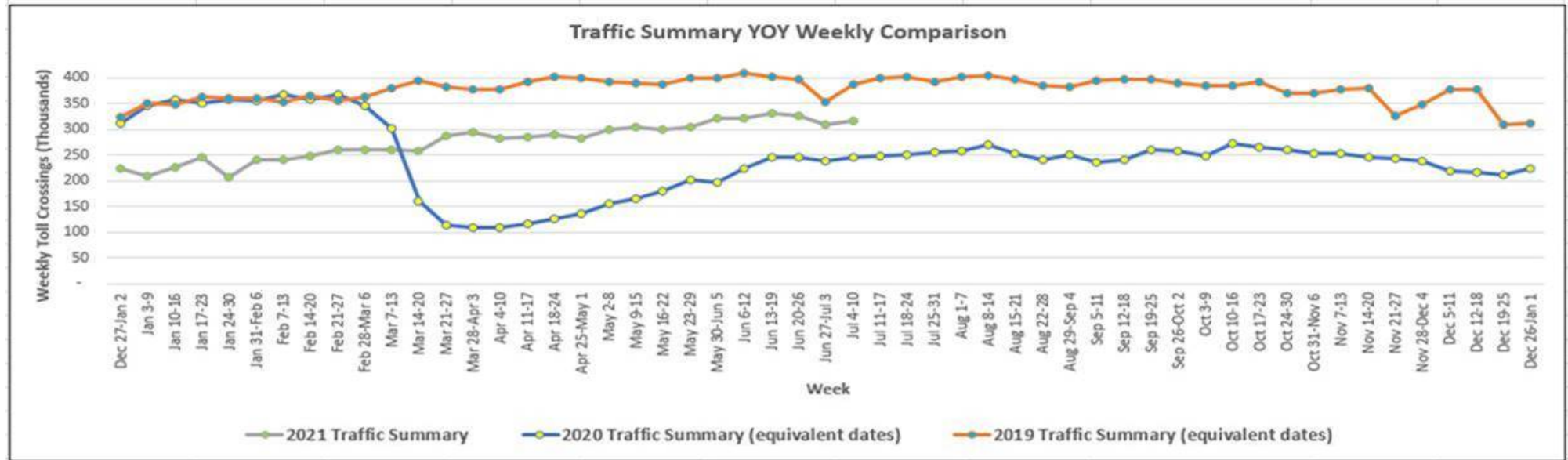
**Golden Gate Bridge, Highway and Transportation District
Transportation Committee
Meeting of July 22, 2021**

Pre-Pandemic Service



- GGT provides **regional and commute bus** service along the U.S. 101 Golden Gate Corridor, and GGF provides **ferry** service between Marin County and San Francisco
- Before the pandemic, **23% of all morning commute trips** from Marin and Sonoma Counties into San Francisco were on Golden Gate buses and ferries
- Our buses and ferries **reduce VMT and GHG emissions** by serving **long-distance regional trips** across San Francisco, Marin, Sonoma, and Contra Costa counties
- GGT provides **equity-focused mobility** along the U.S. 101 corridor with service operating up to 22 hours a day, 7 days a week

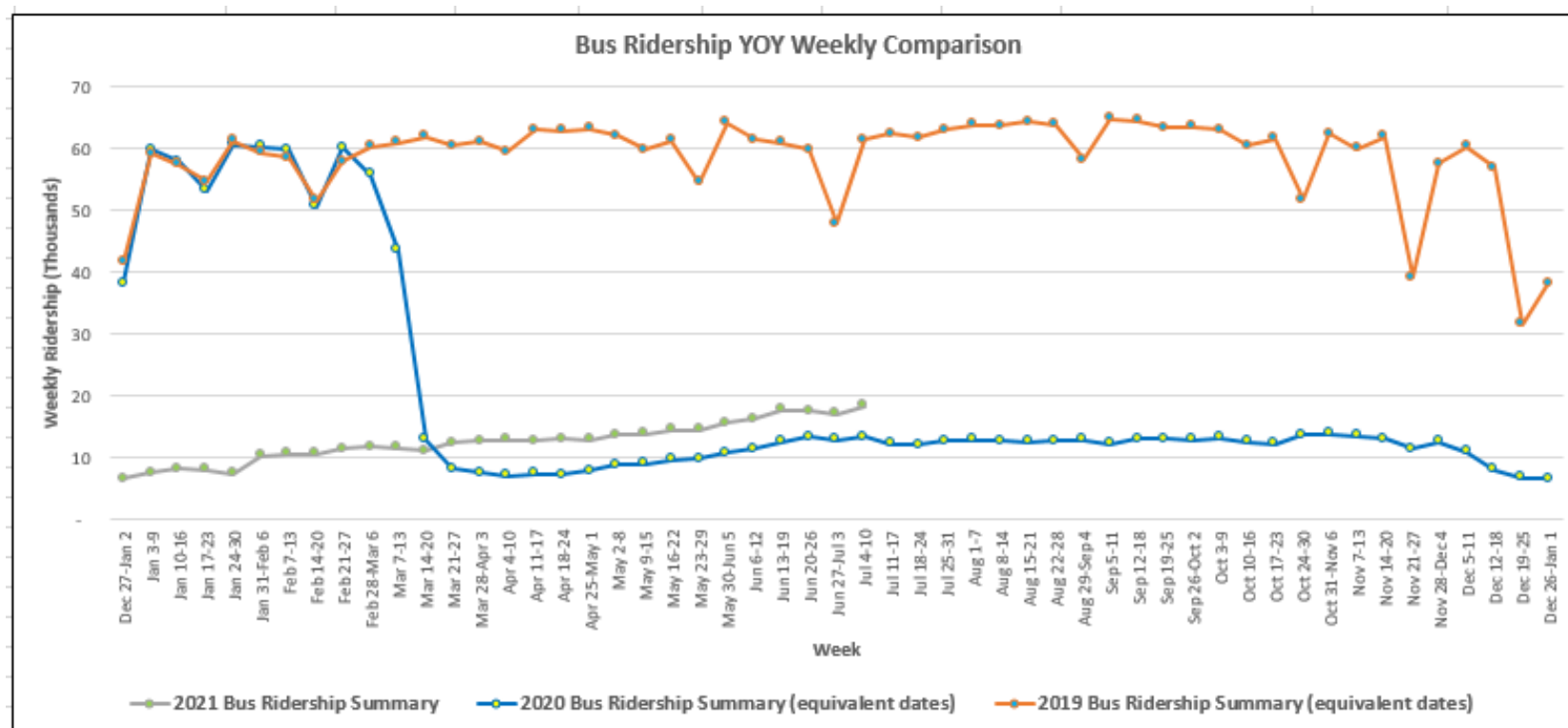
Travel is Significantly Reduced in the Golden Gate Bridge Corridor



2021 Traffic Summary

Dates	Sun	M	T	W	Th	F	Sat	WEEKLY TOTAL	% from week previous	2021 vs 2019% Traffic Change
Jun 6-12	47,346	42,853	43,448	44,978	46,203	47,082	49,300	321,210	0.32%	-21.38%
Jun 13-19	48,262	43,420	44,949	47,007	48,044	50,703	48,899	331,284	3.14%	-17.78%
Jun 20-26	48,923	43,608	43,728	44,860	46,244	49,011	50,533	326,907	-1.32%	-17.74%
Jun 27-Jul 3	48,076	42,648	44,190	44,450	44,873	43,000	41,344	308,581	-5.61%	-12.54%
Jul 4-10	39,956	45,092	43,683	44,416	44,998	48,255	50,565	316,965	2.72%	-18.18%

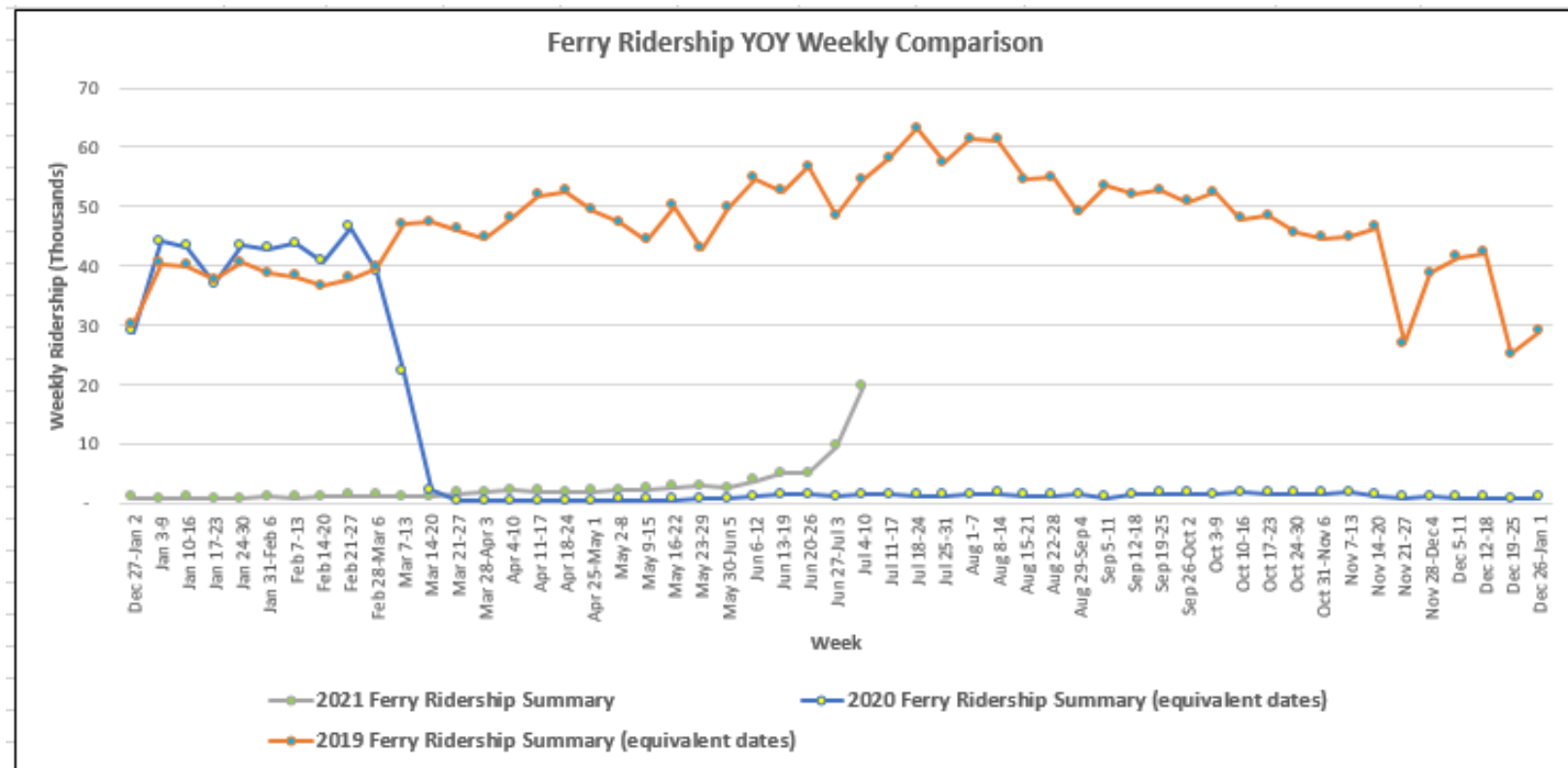
Travel is Significantly Reduced in the Golden Gate Bridge Corridor



2021 Bus Ridership Summary

Dates	Sun	M	T	W	Th	F	Sat	WEEKLY TOTAL	% from week previous	2021 vs. 2019 % Ridership
Jun 6-12	1,730	2,576	2,454	2,428	2,432	2,563	2,105	16,288	4.12%	-73.49%
Jun 13-19	1,672	2,698	2,722	2,703	2,734	2,790	2,428	17,747	8.96%	-70.94%
Jun 20-26	1,837	2,585	2,703	2,717	2,618	2,719	2,446	17,625	-0.69%	-70.58%
Jun 27-Jul 3	1,813	2,363	2,625	2,649	2,608	2,569	2,523	17,150	-2.70%	-64.16%
Jul 4-10	2,674	2,220	2,708	2,731	2,823	2,935	2,211	18,302	6.72%	-70.21%

Travel is Significantly Reduced in the Golden Gate Bridge Corridor



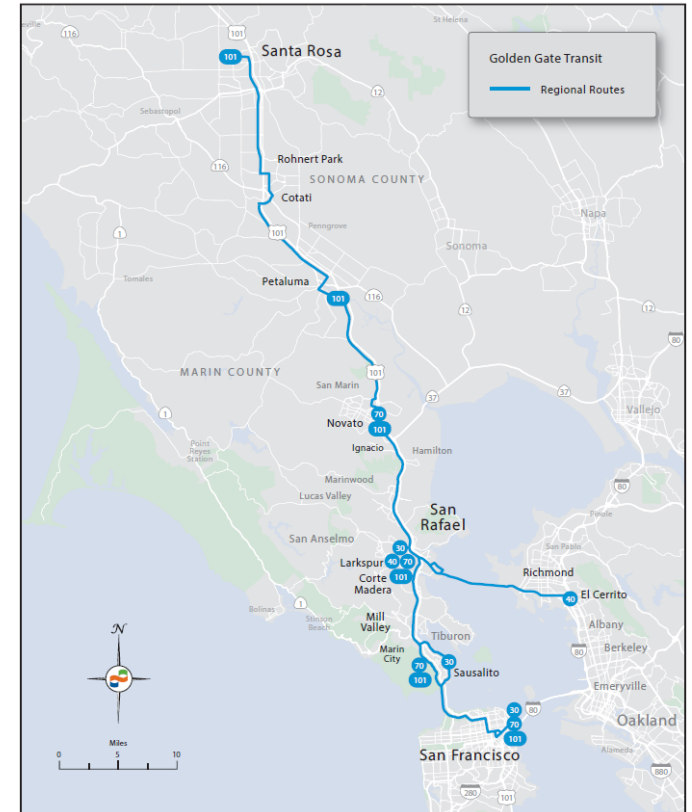
2021 Ferry Ridership Summary

Dates	Sun	M	T	W	Th	F	Sat	WEEKLY TOTAL	% from week previous	2021 vs 2019 % Ridership
Jun 6-12	-	645	732	715	835	811	-	3,738	46.88%	-93.16%
Jun 13-19	-	826	1,065	895	1,184	1,062	-	5,032	34.62%	-90.41%
Jun 20-26	-	839	934	1,041	1,126	1,174	-	5,114	1.63%	-90.98%
Jun 27-Jul 3	-	822	1,051	986	983	988	4,658	9,488	85.53%	-80.40%
Jul 4-10	5,677	5,837	1,044	1,095	1,486	1,809	2,841	19,789	108.57%	-63.68%

Overview of GGT Regional Bus Service

Three distinct subsets of GGT All-Day Regional Bus Service provide mobility and equity-based service. Service operates up to 22 hours each day, every day

- **GGT Limited Stop Regional Service (Route 101)** runs the full length of the corridor from Santa Rosa to San Francisco, serving the center of communities along the route, but otherwise staying on the freeway. This route offers service during time periods when no other transit service is available in Sonoma County
- **GGT Regional Service (Routes 30 and 70)** runs along U.S. 101 between Novato or San Rafael and San Francisco making local freeway pad stops
- **GGT Regional Service Across the Richmond Bridge (Route 40)** provides intercounty service between San Rafael and the El Cerrito del Norte BART station



Overview of GGT Regional Bus Service (Continued)

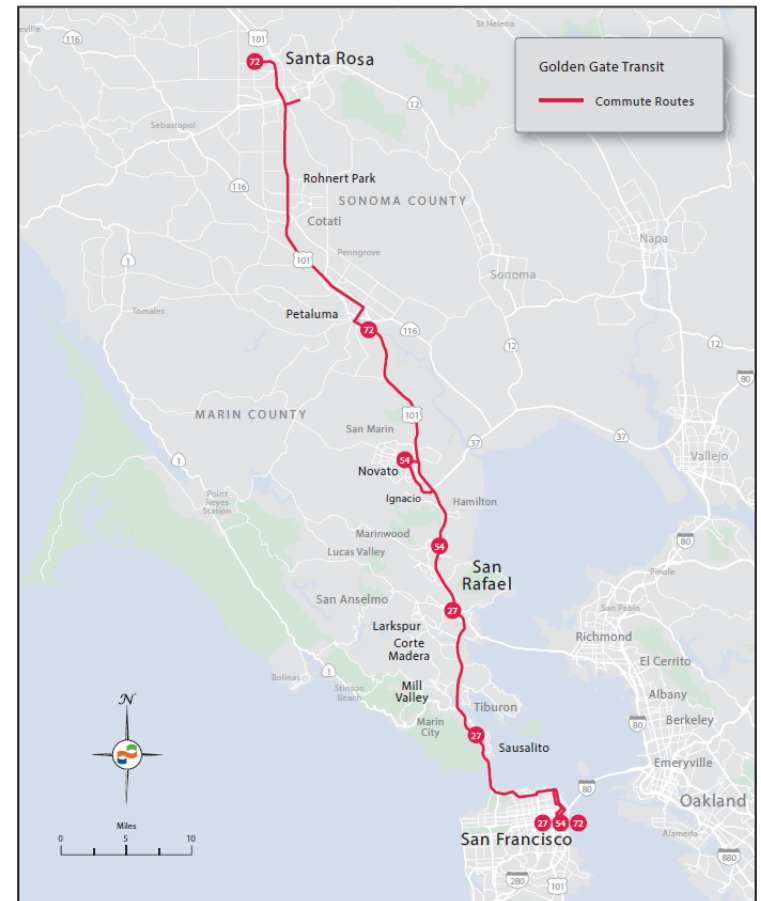
All-day Regional Bus Service Has Long Been the Cornerstone of GGT

- Service levels did not vary significantly despite the pandemic
- Continued to be used by essential workers, transit-dependent travelers, and some commuters
- Service on some routes initially expanded to every 30 minutes during the pandemic, and then shifted to have additional backup trips added as necessary on hourly trips to meet social distancing requirements
- Emerging from the pandemic, service levels will be monitored and expanded as appropriate, as demand increases

Overview of GGT Commute Bus Service

GGT Commute Bus Service is express bus service tailored to reduce peak period traffic on the Golden Gate Bridge

- Typically operates southbound during the morning peak and northbound during the afternoon peak
- Fewer stops with many routes serving park & ride lots or freeway bus pads that riders drive or walk to
- Higher farebox recoveries due to longer distances travelled and higher fares paid. Customers are more likely to be higher income and have a car available for the trip
- Fifteen distinct routes operated prior to the pandemic, some with Express or San Francisco Civic Center variations
- During the pandemic, all but three routes suspended due to very low demand. Portions of three commute routes retained for coverage to allow essential workers to travel into San Francisco



Focus on Equity-Based Riders During the Pandemic

Regional All-Day Bus Services Maintained and Extra Capacity Provided Due to Social Distancing Limits and to Ensure No Riders Left Behind

- Largest GGT Buses (MCI Coaches) deployed on all U.S.101 corridor routes to allow maximum seating
- Driver and equipment resources redeployed from suspended commute routes
- Marin Transit provided additional backup buses between Novato and Marin City to assist local riders in the U.S. 101 corridor and other areas
- Essential and transit-dependent riders stayed with us during the worst of the pandemic and continue to ride



Overview of Golden Gate Ferry Service

Robust Ferry Service Operated Prior to the Pandemic

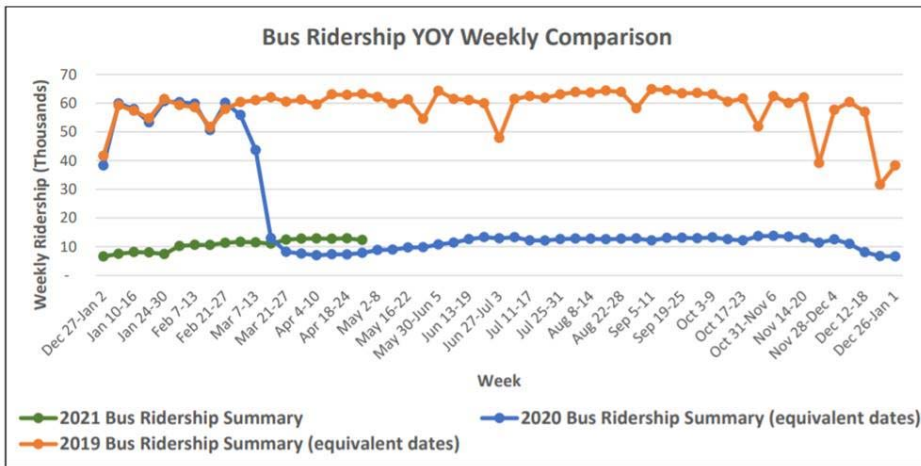
- Weekday and weekend service operated on Larkspur and Sausalito
- Commute period service only operated on Tiburon
- Special Event service to Giants games, Warriors games, and concerts
- Larkspur service very popular with commuters due to fast catamaran ferries
 - Generated high ridership along with high farebox recovery

Riders All But Disappeared During Pandemic and Service Adjusted to Reflect Low Demand

- Weekend service and Special Event service suspended
- Weekday service adjusted to one Larkspur ferry every 90 minutes
 - (75% reduction in service)
- Sausalito and Tiburon service combined. One morning trip to San Francisco, two evening return trips

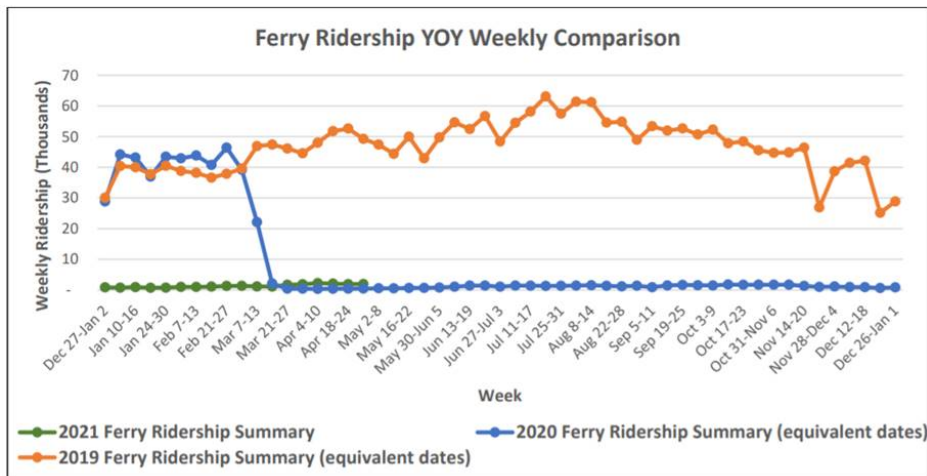
Bus and Ferry Ridership During the Pandemic

COVID-19 BUS RIDERSHIP TRENDS (2019-2021)



- Bus ridership is **down 74%** compared to pre-pandemic levels.
- We maintained Regional Service for essential workers and those who do not own or have ready access to automobiles.
- We reduced pre-COVID bus service by about 50%.

FERRY RIDERSHIP TRENDS (2019-2021)



- Ferry ridership is **down 93%** compared to pre-pandemic levels.
- Weekday ferry service reduced by 75% and suspended all weekend ferry service.
- Pre-pandemic, fares provided over 50% of ferry operating revenue.

GGT Bus Service During the Pandemic Through July 2021

- Service Maintained on Routes 30, 40, 70 and 101
- Skeletal Commute Bus Service Retained on Routes 27, 54 and 72
 - Modified alignments to cover segments of suspended routes
- Backup Buses Added As Required On All Routes
 - Staff met weekly to add, delete, or modify backup bus deployment in response to demonstrated passenger demand
 - Between 20 and 30 backup buses were deployed each day on GGT regional routes
- Weekly Demand Fluctuated as Travel Patterns Shifted
- Varying Patterns Continued through June 2021, When Social Distancing Capacity Limits Were Lifted
- Ridership Remains at Modest Levels

GG Ferry Service During the Pandemic Through July 2021

- **Continued Weekday-Only Commute-Oriented Service**
 - Larkspur: All-Day Service
 - Tiburon/Sausalito peak period-only trips
- **Parking Demand Remained Low at Larkspur Terminal**
 - Successfully deployed parking lot for County of Marin COVID-19 vaccine distribution
- **Emerging Demand for Weekend and Special Event Service**
 - Oracle Park Giants service began operation June 25, 2021
 - Special July 4, 2021 weekend service provided
 - Weekend ferry service resumed July 10, 2021

Where We Are Today

Buses and Ferries Can Now Operate at Full Capacity

- Plenty of seats available
- 57-seat MCI coaches continue to be used on many regional all-day bus trips
- No passenger overloads are occurring
- Ridership remains low, but showing signs of modest growth on GGT bus and Larkspur ferry
- Until downtown San Francisco office workers return, weekday commute period travel will remain well-below pre-pandemic levels

The FTA Requires that the Board Adopt a Title VI Equity Analysis

- Ensure that disadvantaged riders were not adversely affected by a major service change
- Findings from the Title VI Equity Analysis:
 - No disadvantaged riders were adversely affected by the suspension of commute bus service.
- The Board will be requested to adopt the Title VI Equity Analysis for GGT bus service at the July meetings
- Further follow-up with FTA regarding Ferry service changes

Where We Are Today

Ridership Response Will Likely Be a Moving Target

- Tentative and varied indicators of business re-openings in San Francisco
- Rider Survey Indications
 - Most respondents are still working remotely
 - Some riders already back at work
 - Some will return in September; Still more expect to return by December
 - Work schedules and days may still be fluid

Equity-Based Service Will Continue To Be Important

- Individuals without access to autos stayed with us throughout the pandemic
- GGT Route 101 as a regional intercounty connector will be important
- Closely monitor regional Routes 30, 40, and 70 for travel to/from San Francisco or East Bay

Service Trends

- Three commute routes that remained in operation showing modest growth in riders
 - Some bus service improvements in June 2021 to improve frequencies
 - Further improvements in September 2021, including frequency enhancements on GGT Route 101
- Modest increase in weekday ferry riders



Where We Are Today

Peak Transit Ridership Has Not Yet Recovered

Peak Bridge Traffic is also significantly down

Southbound A.M. Peak Period Average Daily GGT Bus Passengers Crossing the Golden Gate Bridge		
Pre-Covid-19 Pandemic	Feb-20	2,253
	Apr-20	84
During the Pandemic	Jun-20	149
Post Reopening	Jun-21	217
Southbound A.M. Peak Period Average Daily Ferry Passengers Crossing the Bay		
Pre-Covid-19 Pandemic	Feb-20	2,760
	Apr-20	17
During the Pandemic	Jun-20	39
Post Reopening	Jun-21	190

A Measured Response to Returning Riders

Add Service Back As Customers Return

- Not good for finances or environment to run empty or nearly empty buses and ferries
- Very few people going into San Francisco during traditional commute period

Flexibility Will Be Key

Continue Watching the Horizon for Trends and Potential New Opportunities

