



**Presentations for November 4, 2021 Board of Directors Meeting**



## **Item 9: Berkeley Pier/Ferry Study and Ferry Service Business Plan Update**

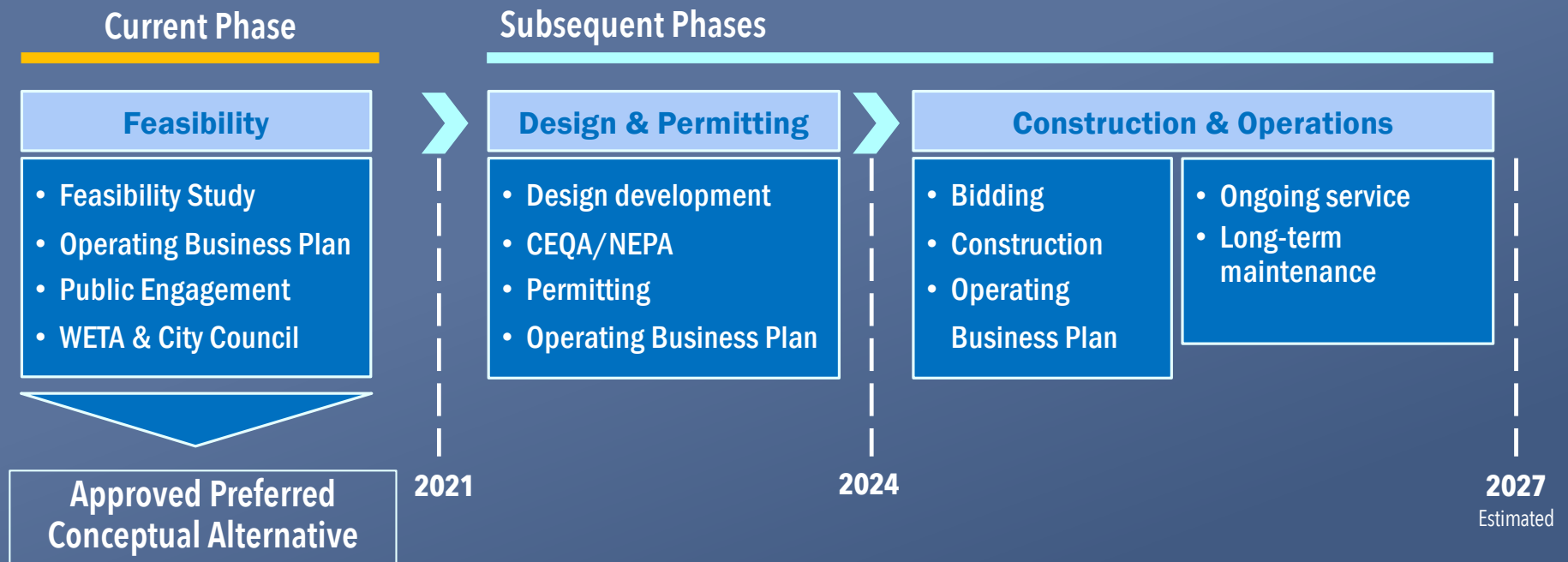
# Item #9 - Berkeley Pier/Ferry Study & Ferry Service Business Plan Update

WETA Board of Directors Meeting  
November 4, 2021





# Phases of MOU



Note: MOU may be terminated at any phase upon mutual agreement.



# Public Engagement Steps

|               |   |                  |
|---------------|---|------------------|
| Workshop #1   | <ul style="list-style-type: none"><li>• Introduce Pier/Ferry Study &amp; Pier Samples</li></ul>   | January 21, 2021 |
| Planning      | <ul style="list-style-type: none"><li>• City Council Work Session 2/16/21</li><li>• WETA Board Session 3/4/21</li><li>• Review workshop feedback</li><li>• Develop landside and waterside options</li></ul> | Feb - June       |
| Questionnaire | <ul style="list-style-type: none"><li>• Questionnaire on ferry &amp; pier preferences</li></ul>   | March - June     |
| Workshop #2   | <ul style="list-style-type: none"><li>• Present/discuss Waterside &amp; Landside Concepts</li></ul>   | Aug 10           |
| Planning      | <ul style="list-style-type: none"><li>• Develop a preferred conceptual alternative</li></ul>  | Aug - October    |
| Workshop #3   | <ul style="list-style-type: none"><li>• Present Preferred Conceptual Alternative</li></ul>  | Oct 27, 2021     |

# Key Messages from the Community

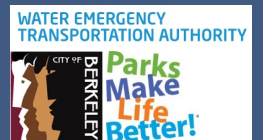
- ✓ Community supports a ferry; parking needs to be managed.
- ✓ Community strongly supports a restored pier that serves all users.
- ✓ Protect character & environmental resources of the Waterfront.
- ✓ Protect existing user needs and recreational assets.

# WETA Berkeley Ferry Service Business Plan

Service Plan

Ridership & Market Demand

Equity Considerations





# Initial Screening of Route Options

|               |                              | RIDERSHIP | MARKETS              | EQUITY BENEFITS | RATING               |
|---------------|------------------------------|-----------|----------------------|-----------------|----------------------|
| Route Options | <u>San Francisco</u>         | High      | Commuter, Rec, Event | High            | Recommended          |
|               | South San Francisco          | Med-Low   | Commuter             | Medium          | Future Consideration |
|               | Mission Bay (Direct)         | Medium    | Commuter, Rec, Event | Medium          | Future Consideration |
|               | <u>Mission Bay (From SF)</u> | Medium    | Commuter, Rec, Event | Med-Low         | Recommended          |
|               | Larkspur (Weekday)           | Low       | Commuter             | Med-Low         | Deferred             |
|               | <u>Larkspur (Weekend)</u>    | Medium    | Rec                  | Medium          | Recommended          |
|               | Vallejo                      | Low       | Commuter             | Low             | Deferred             |

# Ridership Estimation Methodology

- Based on Alameda County Transportation Commission's regional model\*
- Forecasts are “unconstrained”
- Adjustments made to account for:
  - Headways
  - Capacity
  - Observed changes in peak versus all-day ridership
- Verified against actual ridership counts

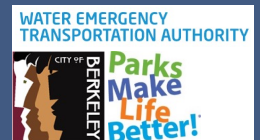
\*Source: Hovercraft Feasibility Study – 2019 & 2021 Update



# Ridership Forecast – Average Daily Boardings

|                            |  | Weekday<br>Average | Weekend Day<br>Average | Special Events<br>(Average/day) |
|----------------------------|--|--------------------|------------------------|---------------------------------|
| 2020<br>Daily<br>Boardings | 1) Berkeley – SF                         | 1,830              | 2,990                  | 200                             |
|                            | 2) Berkeley – SF – Mission Bay           | 2,020              | 3,300                  | 200                             |
|                            | 3) Berkeley – Larkspur (weekend service) | —                  | 490                    | —                               |
| 2040<br>Daily<br>Boardings | 1) Berkeley – SF                         | 2,110              | 3,450                  | 230                             |
|                            | 2) Berkeley – SF – Mission Bay           | 2,320              | 3,800                  | 230                             |
|                            | 3) Berkeley – Larkspur (weekend service) | —                  | 580                    | —                               |

- Operations Assumptions:
- 2 vessels
  - 35-minute average peak headway
  - 250-passenger vessels





# Comparison with Existing Ridership (2019)

|  |                               | Weekday | Weekend Day |
|--|-------------------------------|---------|-------------|
| Existing<br>and<br>Potential<br>Berkeley<br>Routes | Oakland/Alameda – SF          | 5,047   | 4,120       |
|  | Vallejo – SF                  | 4,081   | 1,983       |
|  | Berkeley – SF – Mission Bay   | 2,020   | 3,300       |
|  | Berkeley – SF                 | 1,830   | 2,990       |
|  | Harbor Bay – SF               | 1,417   | —           |
|  | Richmond – SF                 | 813     | 680         |
|  | Oakland/Alameda – SSF         | 601     | —           |
|  | Berkeley – Larkspur (Weekend) | —       | 490         |

# Conceptual Service Schedule Weekday to SF

- (2) vessels & (4) crews
- (8) morning peak direction trips: 6:30 am – 12 pm
- (8) afternoon peak direction trips: 3:30 pm – 8:30 pm
- Timed-connections to Mission Bay
- Special event service scheduled as needed

## Berkeley to San Francisco

| Weekdays (Monday-Friday) Westbound: Berkeley to San Francisco |                    |
|---|--------------------|
| Depart Berkeley   | Arrive Downtown SF |
| 6:30  | 6:55               |
| 7:05  | 7:30               |
| 7:40  | 8:05               |
| 8:15  | 8:40               |
| 8:50  | 9:15               |
| 9:25  | 9:50               |
| 10:40   | 11:05              |
| 11:15   | 11:40              |
| 16:05   | 16:30              |
| 16:40   | 17:05              |
| 17:15   | 17:40              |
| 17:50   | 18:15              |
| 19:05   | 19:30              |
| 19:40   | 20:05              |

| Weekdays (Monday-Friday) Eastbound: San Francisco to Berkeley |                 |
|---|-----------------|
| Depart Downtown SF  | Arrive Berkeley |
| 7:05  | 7:30            |
| 7:40  | 8:05            |
| 8:15  | 8:40            |
| 8:50  | 9:15            |
| 10:05   | 10:30           |
| 10:40   | 11:05           |
| 15:30   | 15:55           |
| 16:05   | 16:30           |
| 16:40   | 17:05           |
| 17:15   | 17:40           |
| 17:50   | 18:15           |
| 18:25   | 18:50           |
| 19:40   | 20:05           |
| 20:15   | 20:40           |

## San Francisco to Berkeley



# Conceptual Weekend Schedule

Berkeley-SF: (7) departures 8:30 am to 5 pm; headways of 70 – 110 minutes

| Berkeley to<br>San Francisco | Weekend Westbound: Berkeley to San Francisco |                    | Weekend Eastbound: San Francisco to Berkeley |                 | San Francisco<br>to Berkeley |
|------------------------------|--|--------------------|--|-----------------|------------------------------|
|                              | Depart Berkeley                              | Arrive Downtown SF | Depart Downtown SF                           | Arrive Berkeley |                              |
|                              | 8:30   | 8:55               | 9:05   | 9:30            |                              |
|                              | 9:40   | 10:05              | 10:15  | 10:40           |                              |
|                              | 10:50  | 11:15              | 12:05  | 12:30           |                              |
|                              | 12:40  | 13:05              | 13:30  | 13:55           |                              |
|                              | 14:00  | 14:25              | 14:40  | 15:05           |                              |
|                              | 15:10  | 15:35              | 15:45  | 16:10           |                              |
|                              | 17:00  | 17:25              | 17:35  | 18:00           |                              |

Berkeley-Larkspur: (6) departures 9 am to 5:30 pm; headways of 90 – 150 minutes

| Berkeley to<br>Larkspur | Weekend Westbound: Berkeley to Larkspur |                 | Weekend Eastbound: Larkspur to Berkeley |                 | Larkspur to<br>Berkeley |
|-------------------------|---|-----------------|---|-----------------|-------------------------|
|                         | Depart Berkeley                         | Arrive Larkspur | Depart Larkspur                         | Arrive Berkeley |                         |
|                         | 9:30                                    | 10:05           | 10:15                                   | 10:50           |                         |
|                         | 11:00                                   | 11:35           | 11:45                                   | 12:20           |                         |
|                         | 12:30                                   | 13:05           | 13:55                                   | 14:30           |                         |
|                         | 15:00                                   | 15:35           | 15:45                                   | 16:20           |                         |
|                         | 16:30                                   | 17:05           | 17:15                                   | 17:50           |                         |
|                         | 18:40                                   | 19:15           | 19:25                                   | 20:00           |                         |

(2) vessels running two services. Special event service scheduled as needed.

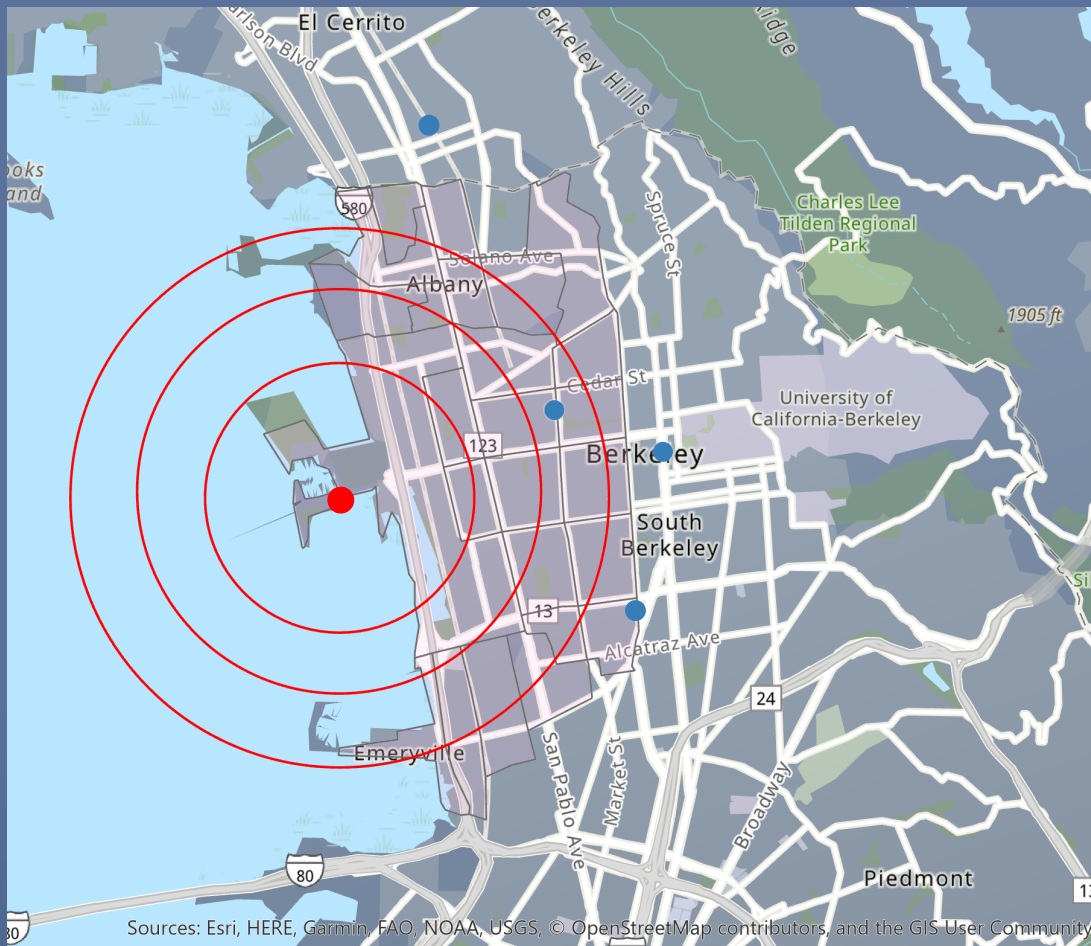




# Equity and Economic Development





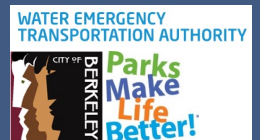


# Points of Interest

- 1 mile
  - Bayer
  - Fourth Street
- 1.5 mile
  - University Village
  - Kaiser Permanente
- 2 mile
  - North Berkeley BART station
- Bart stations (blue dots)

## Legend

- BART stations and ferry terminal
- Radii (1, 1.5, 2 miles)
- Census Tracts (2 miles)



# U.S. Census Socio/Economic Demographics

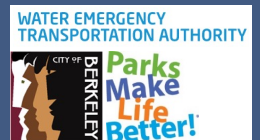
| Geography                                | Jobs   | % Public transit commute <sup>1</sup> | Median HH income | UNEMP <sup>3</sup> rate | Race/ethnicity: % non-white <sup>2</sup> | Population |
|--|--------|---------------------------------------|------------------|-------------------------|--|------------|
| 1-mile radius                            | 8,980  | 20%                                   | \$81,000         | 5.0%                    | 57%                                      | 9,889      |
| 1.5-mile radius                          | 18,163 | 26%                                   | \$85,000         | 3.9%                    | 54%                                      | 30,804     |
| 2-mile radius                            | 31,487 | 28%                                   | \$96,000         | 4.3%                    | 57%                                      | 81,701     |
| City of Berkeley                         | 43,575 | 26%                                   | \$85,500         | 5.3%                    | 47%                                      | 124,321    |
| Albany/Berkeley/Emeryville combined area | 68,533 | 26%                                   | \$88,600         | 4.8%                    | 49%                                      | 157,497    |

Notes:

1 - Figures rounded to nearest whole number

2 - Calculated as 1 - (% white alone)

3 - UNEMP: Unemployment





# Opportunity for Job Access

## Average Salary and Number of Jobs — East Bay vs. San Francisco

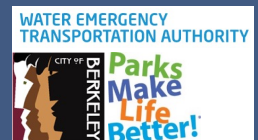
| Occupation Category                      | Average Salary (2021 Q1) |                  | SF/Peninsula<br>Salary<br>Premium |
|--|--------------------------|------------------|-----------------------------------|
|  | Alameda/<br>CCC          | SF/ San<br>Mateo |                                   |
| Sales and Related                        | \$59,000                 | \$75,000         | 27%                               |
| Transportation and Material Moving       | \$49,000                 | \$58,000         | 18%                               |
| Legal                                    | \$146,000                | \$170,000        | 16%                               |
| Arts/Design, Entertainment/Sports, Media | \$78,000                 | \$89,000         | 14%                               |
| Management                               | \$158,000                | \$179,000        | 13%                               |
| <b>TOTAL (all categories)</b>            | <b>\$76,000</b>          | <b>\$93,000</b>  | <b>21%</b>                        |

**21% average  
salary premium**

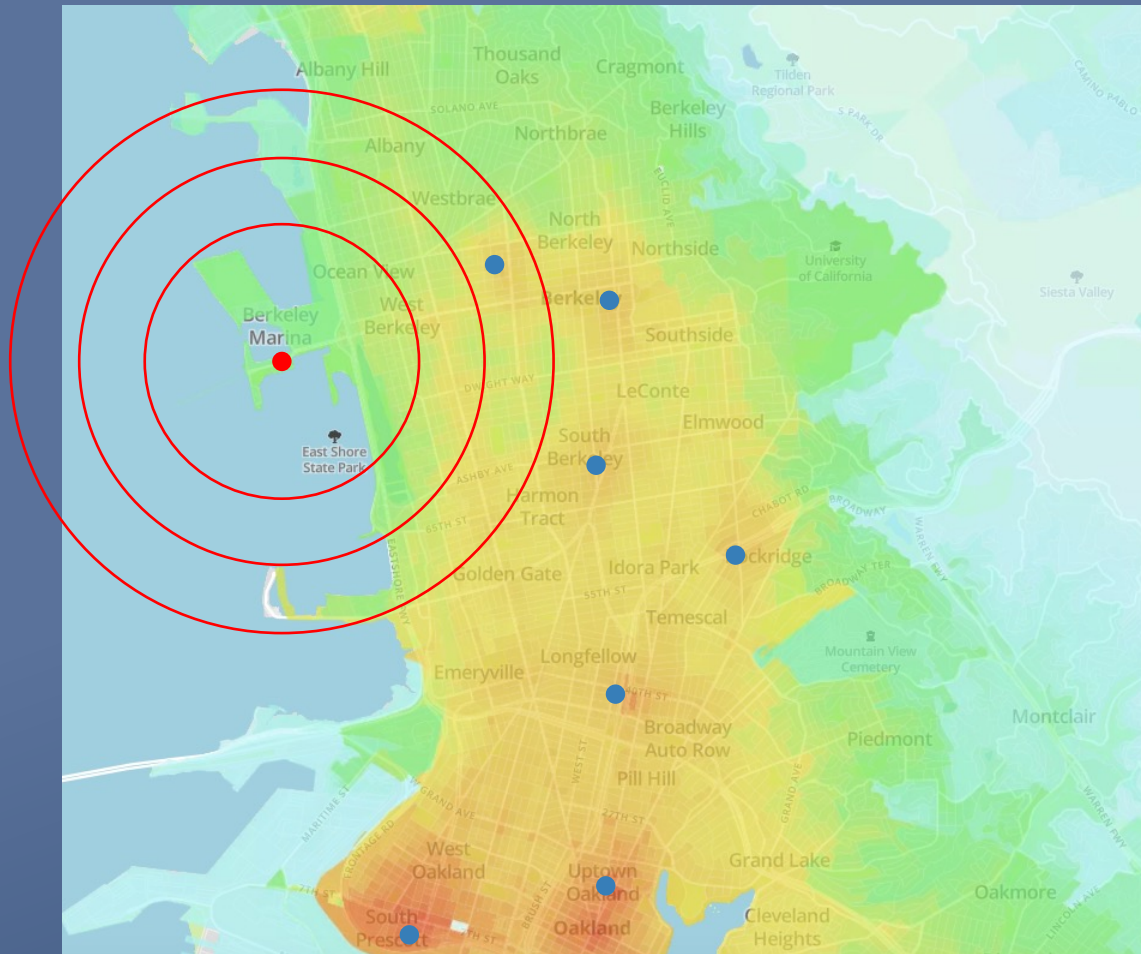


Top 5 categories ranked by salary premium

Source: California Employment Development Department



# Access to Jobs via Transit



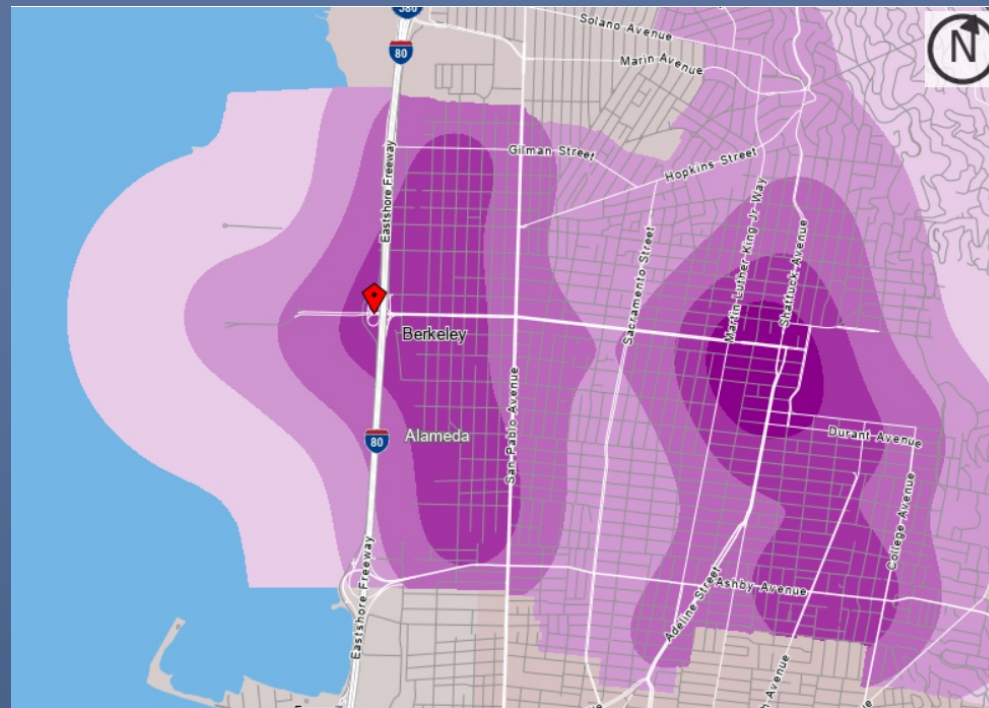
## Jobs within 30 minutes (Transit, AM peak)

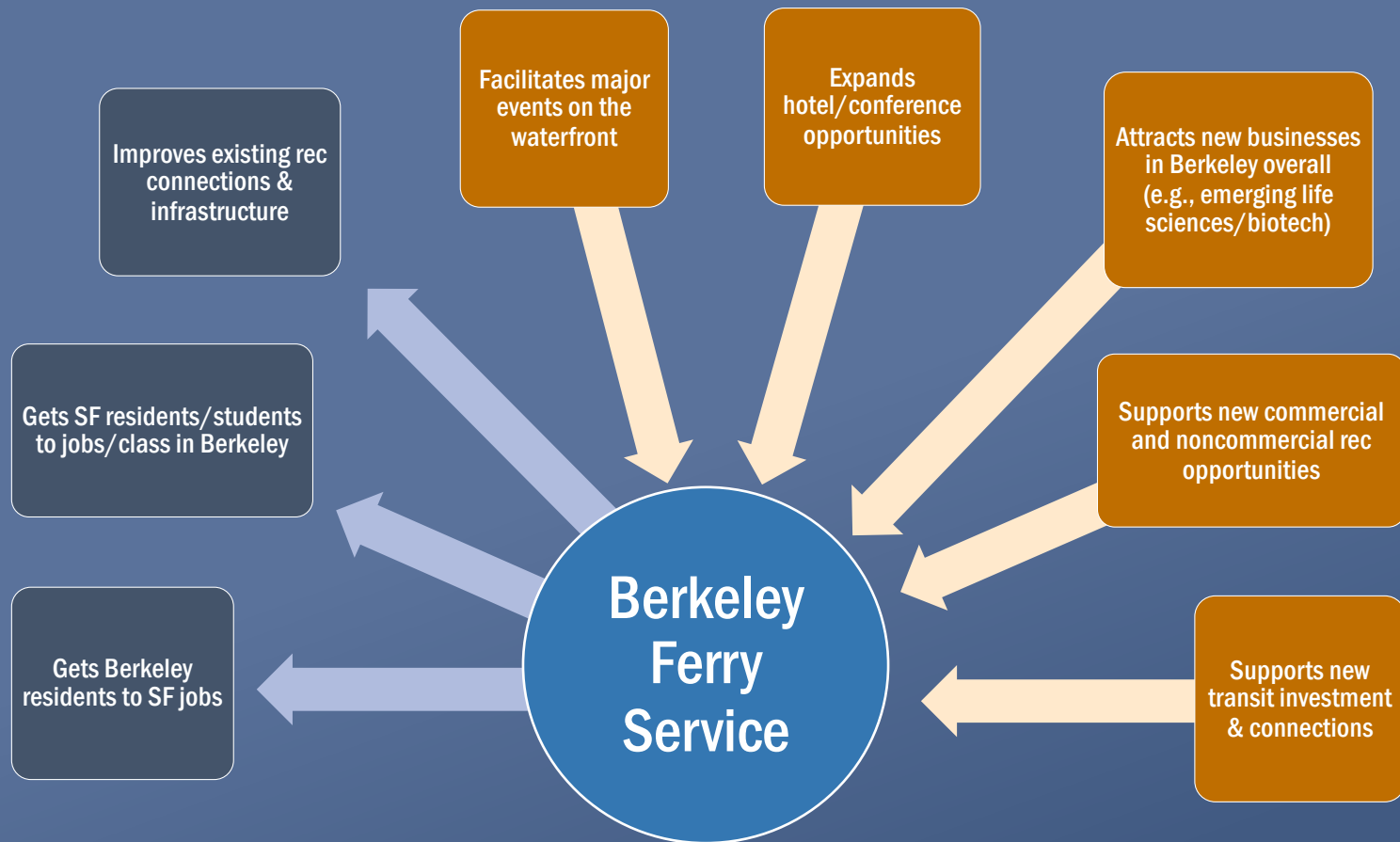


Source: Accessibility Observatory,  
University of Minnesota (2019)



# Job Opportunities in Berkeley

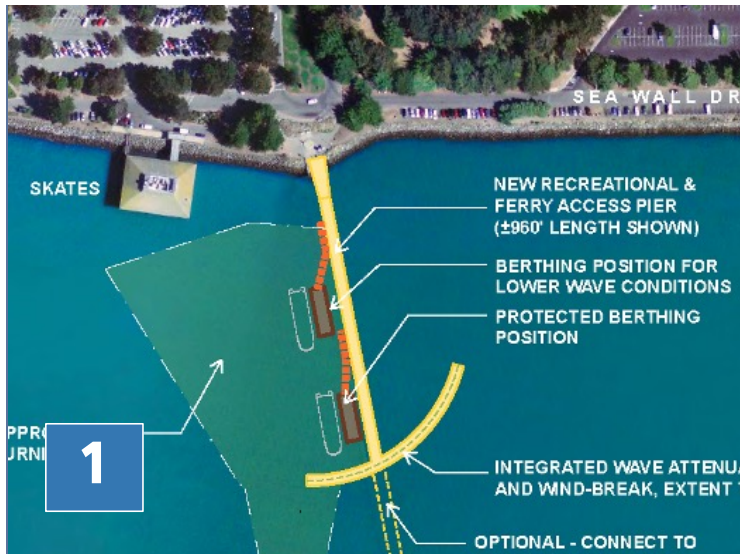




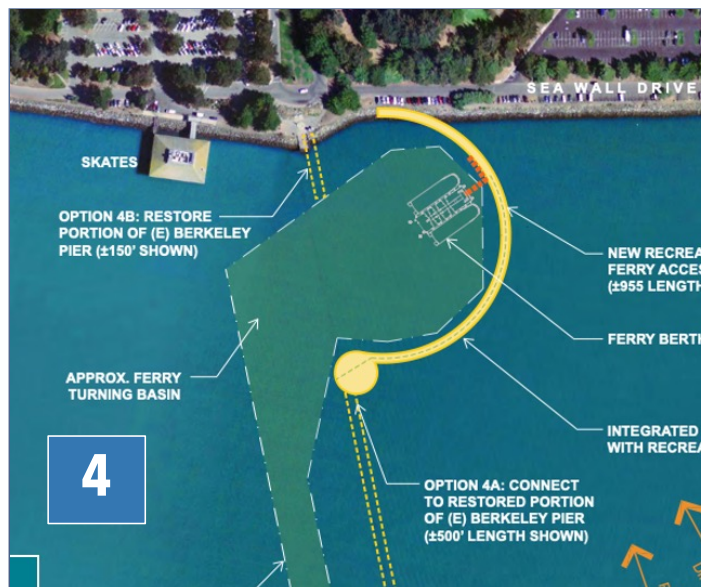
**Ferry service can support both existing and attract new activities.**

# Preferred Waterside Concept Plan





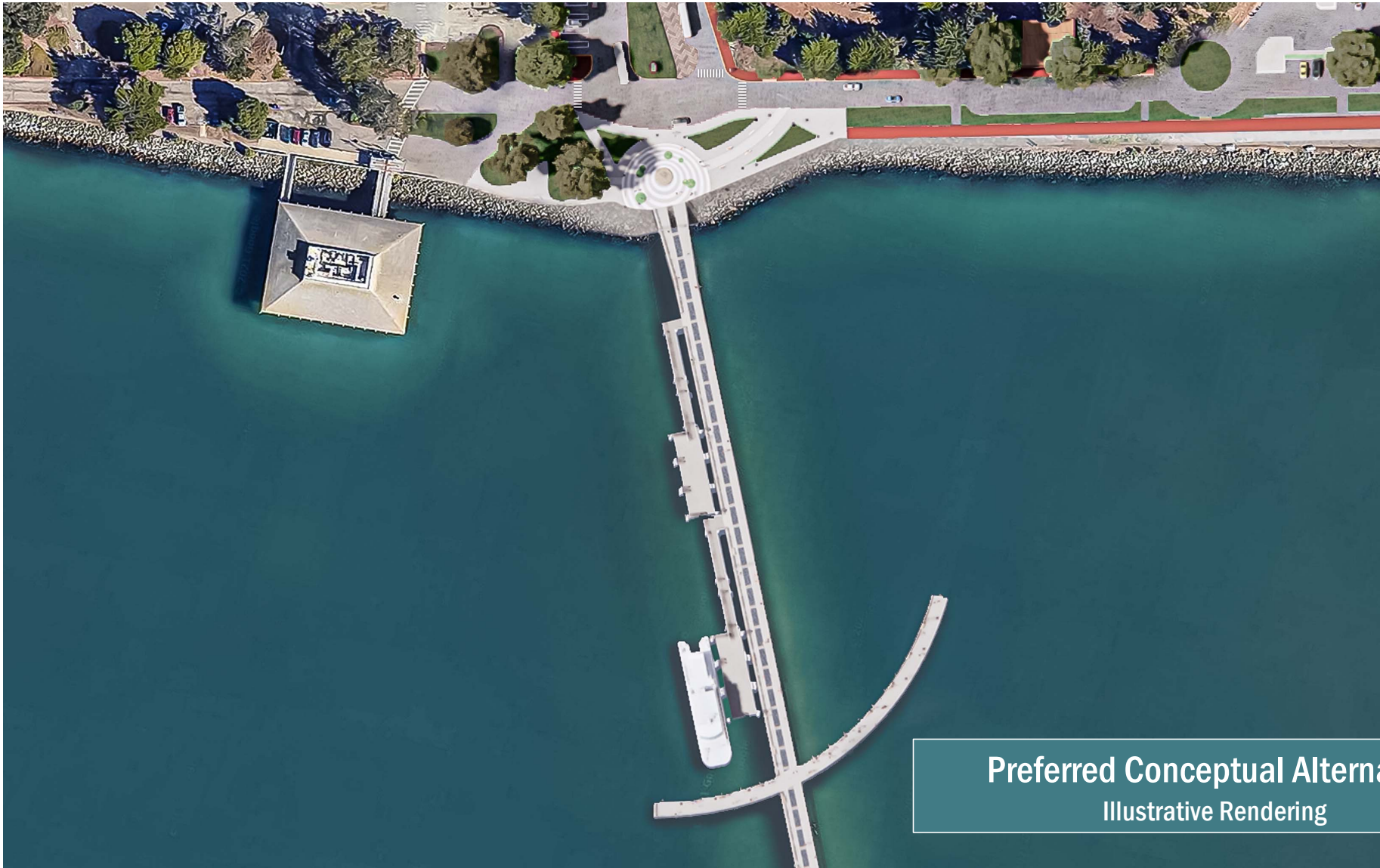
# Alternatives Evaluated



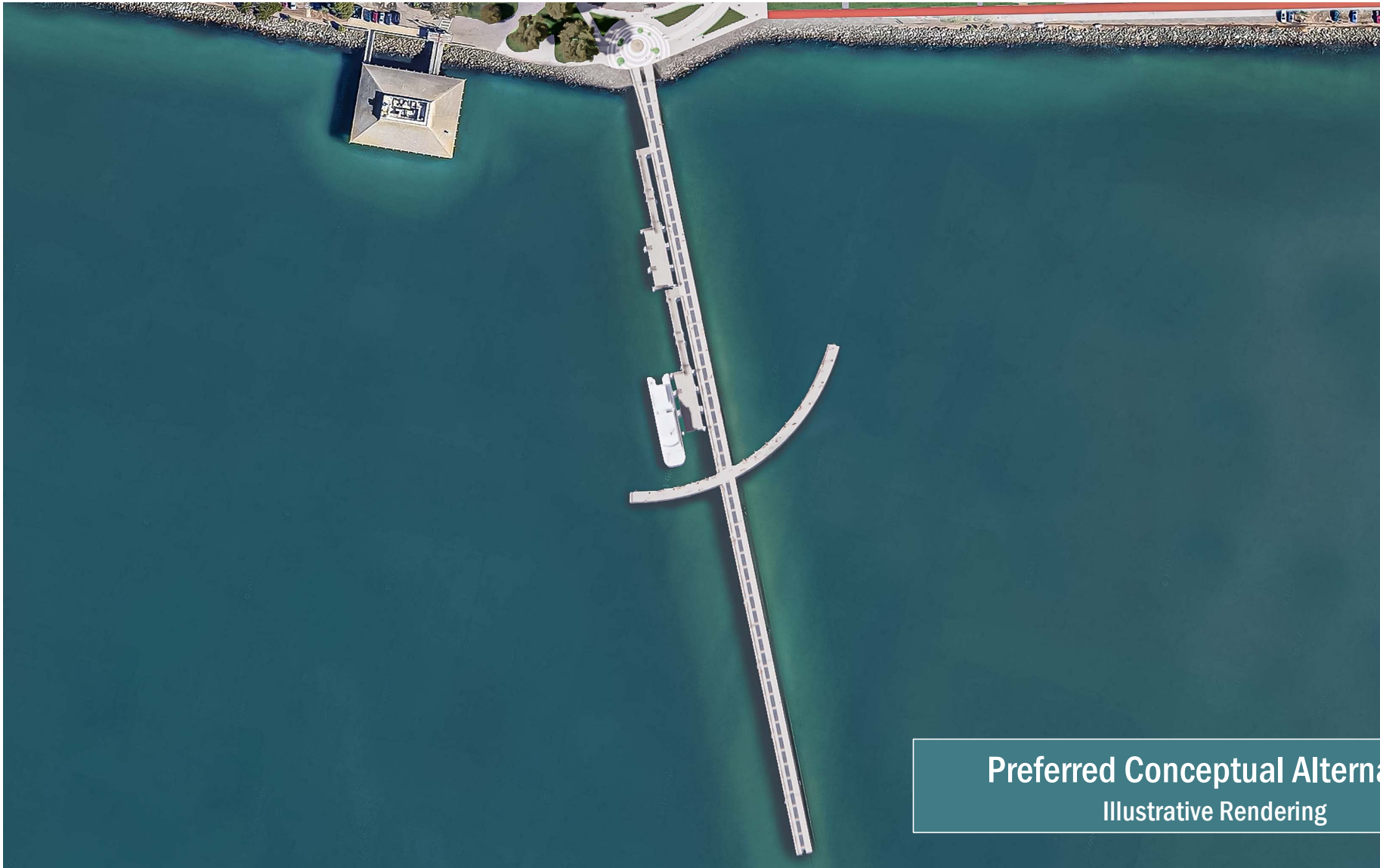




Preferred Conceptual Alternative  
Illustrative Rendering



**Preferred Conceptual Alternative**  
Illustrative Rendering



**Preferred Conceptual Alternative**  
Illustrative Rendering



# Preferred Conceptual Alternative

## Illustrative Rendering







Preferred Conceptual Alternative  
Illustrative Rendering





**Preferred Conceptual Alternative**  
Illustrative Rendering





Preferred Conceptual Alternative  
Illustrative Rendering





**Preferred Conceptual Alternative**  
Illustrative Rendering

## Preferred Conceptual Alternative

Illustrative Rendering







Preferred Conceptual Alternative  
Illustrative Rendering



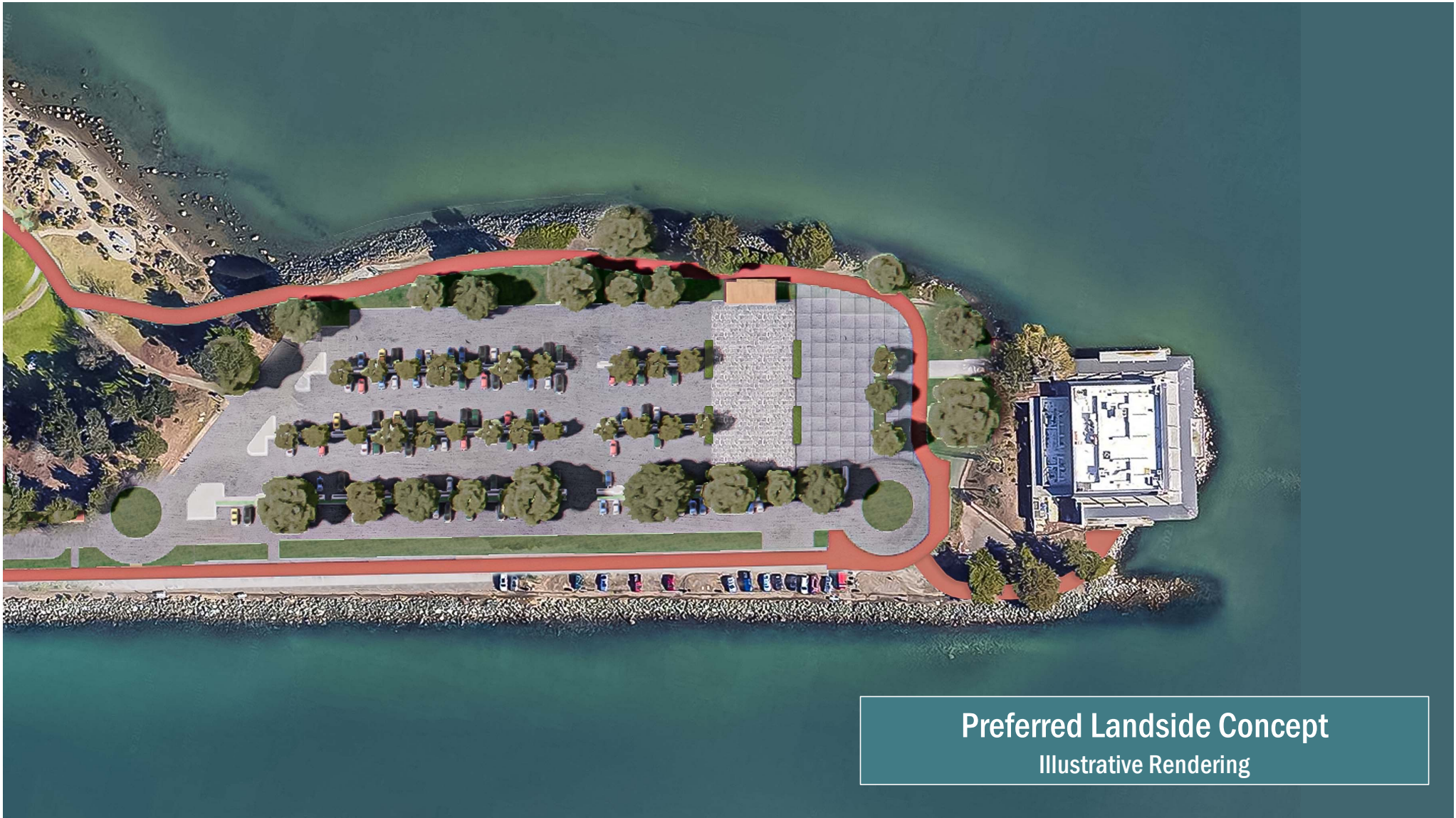
|   |        |   |
|---|--------|---|
| 1 | \$3.7  | Demo Existing Pier                      |
| 2 | \$19.6 | Dual-Purpose Pier                       |
| 3 | \$9.6  | Integrated Breakwater                   |
| 4 | \$11.0 | Ferry Berthing Facility                 |
| 5 | \$2.9  | Berthing Facility – Guide/Dolphin Piles |
| 6 | \$4.6  | Dredging                                |
| 7 | \$4.2  | Ferry Facility Electrification          |
| 8 | \$13.9 | Recreational Pier Extension             |

\$69.5 M TOTAL ESTIMATED

Preferred Alternative  
Waterside Estimated Costs

# Preferred Landside Concept Plan





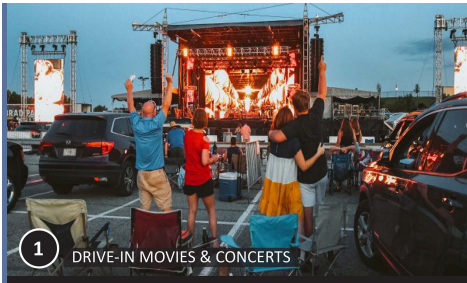
Preferred Landside Concept  
Illustrative Rendering





Preferred Landside Concept  
Illustrative Rendering





1 DRIVE-IN MOVIES & CONCERTS



1 EVENTS, PARTIES, FOOD TRUCKS/FESTS



1 FARMER'S MARKET



2 PERFORMANCES/SHOWS



3 EXTENDED BAY TRAIL



4 KAYAK LAUNCH



6 FISH CLEANING TABLES



5 PUBLIC SHORELINE









Waterside Estimated \$69.5 M

Landside Estimated \$14.0 M

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Total Estimated \$83.5 M

Vessels (2 x 250 pax) \$32.0 M

Preferred Conceptual Alternative  
Illustrative Rendering





## **Item 10: WETA Emergency Response Update**

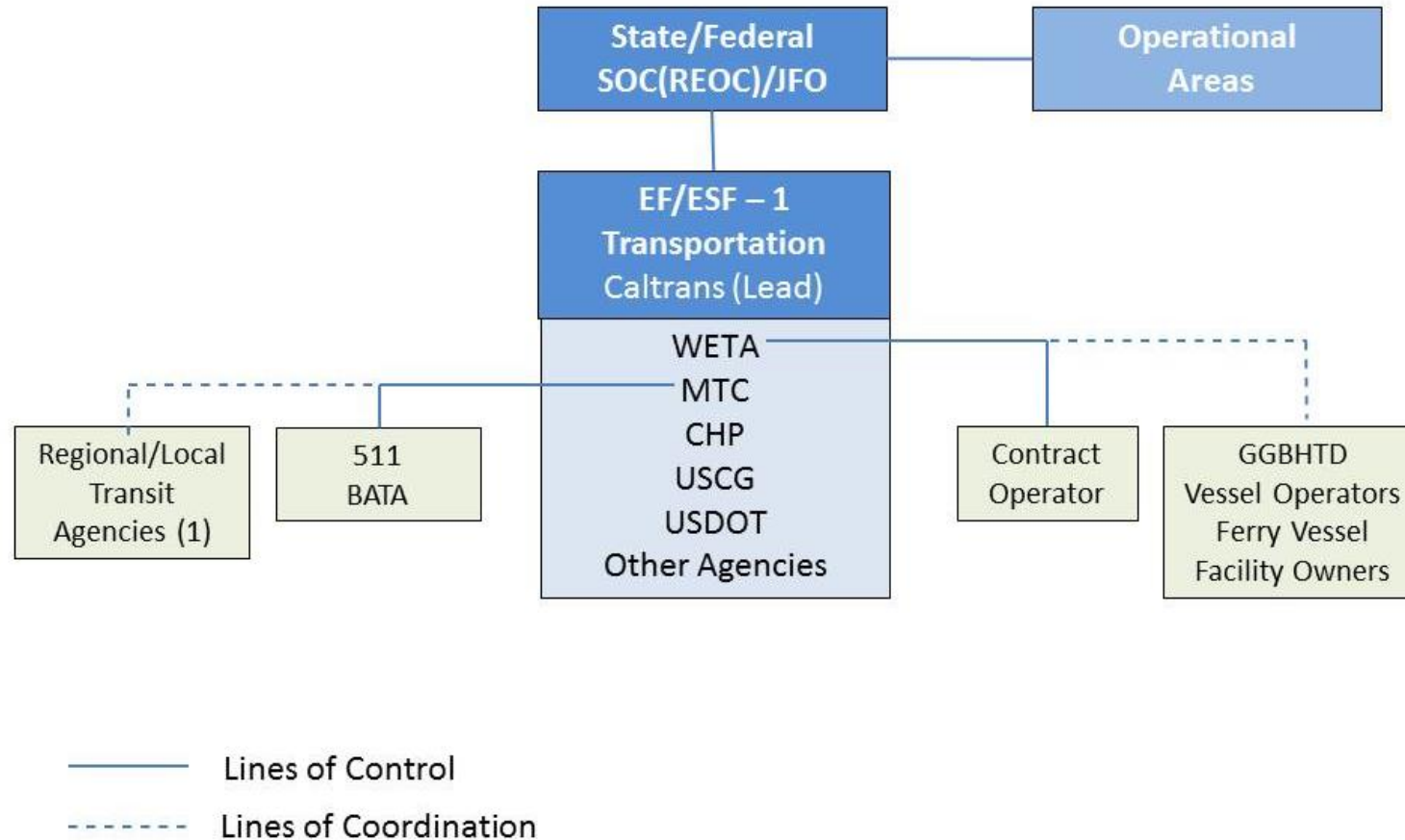
# WATER EMERGENCY TRANSPORTATION AUTHORITY

## Emergency Response Update

November 2021



# How WETA fits into the Regional Emergency Framework



(1) Local transit agencies may report to OAs

# Vallejo Active Shooter Exercise – 2015





# Vallejo Active Shooter Exercise – 2015





# Vallejo Active Shooter Exercise – 2015





# MARAD Fueling Exercises – 2015 & 2017





# MARAD Fueling Exercises – 2015 & 2017





# MARAD Fueling Exercises – 2015 & 2017



# Oakland Airport Water Rescue Plan Validation Exercise – April 2018



# Oakland Airport Water Rescue Plan Validation Exercise – April 2018





# Oakland Airport Water Rescue Plan Validation Exercise – April 2018



# Oakland Airport Water Rescue Plan Validation Exercise – April 2018



# Oakland Airport Water Rescue Plan Validation Exercise – April 2018





# Urban Shield Red Command – VMAP Exercise – September 2018



# Urban Shield Red Command – VMAP Exercise – September 2018





# Urban Shield Red Command – VMAP Exercise – September 2018



# Urban Shield Red Command – VMAP Exercise – September 2018





# Urban Shield Red Command – VMAP Exercise – September 2018



# Urban Shield Red Command – VMAP Exercise – September 2018

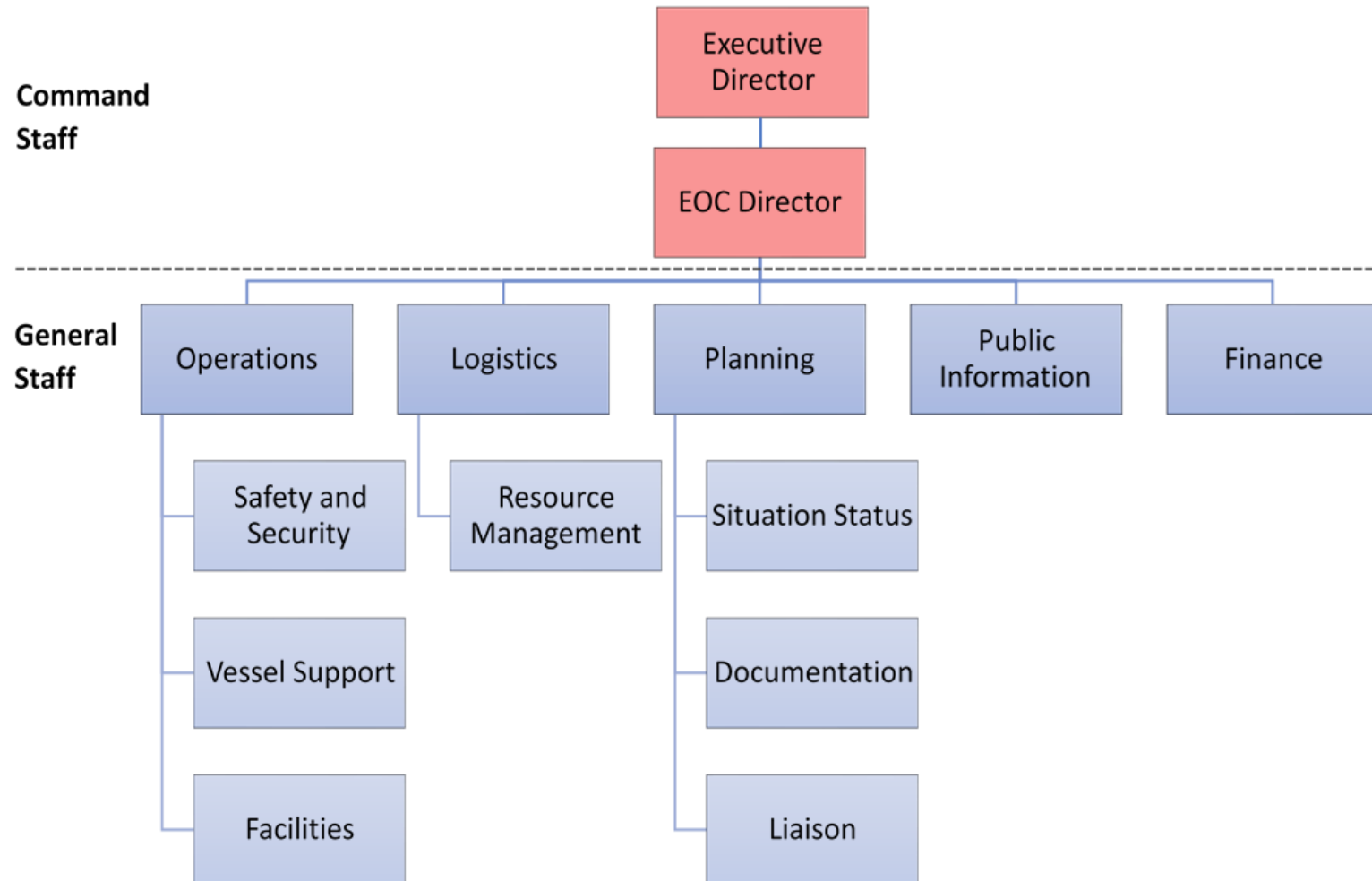




# Active Shooter Exercise – July 2020



# WETA EOC Team Organization/Positions







## **Item 11: Pandemic Recovery Program Marketing and Outreach Campaign Update**



# PANDEMIC RECOVERY PROGRAM | MARKETING & OUTREACH CAMPAIGN UPDATE

NOVEMBER 4, 2021



# OBJECTIVES

- Educate the widest population of potential riders of ferry service resumption and fare/schedule changes
- Reintroduce the San Francisco Bay Ferry brand to the communities we serve
- Build upon positive SFBF brand sentiment by highlighting what people love about the service
- Strengthen our foundation of community support to build on over the longer course of recovery

## AD METRICS

- **Out-of-home display:** 21 million impressions across 14 billboards
  - Large reach focused on potential riders travelling corridors we serve
- **Radio:** 1.7 million listeners over 8 weeks
  - Selling the lower fares and service enhancements
- **Digital media:** 3.5 million impressions
  - Video performed strongly (900K views, 54% completion rate on YouTube)
  - High click rate and cost efficiency for search ads





# DIGITAL PROGRAMMATIC

# WETA

**THE  
BEST WAY  
BACK.**


[LEARN MORE](#)




 **San Francisco Bay Ferry**  
A SERVICE OF WETA

**EL MEJOR  
CAMINO DE  
REGRESO.**


[LEARN MORE](#)




 **San Francisco Bay Ferry**  
A SERVICE OF WETA

**YOU COULD  
USE SOME  
FRESH AIR.**

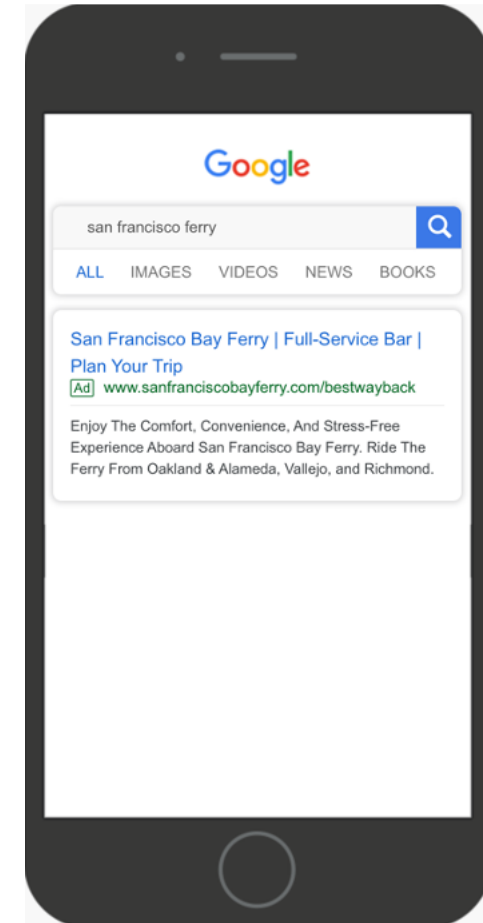
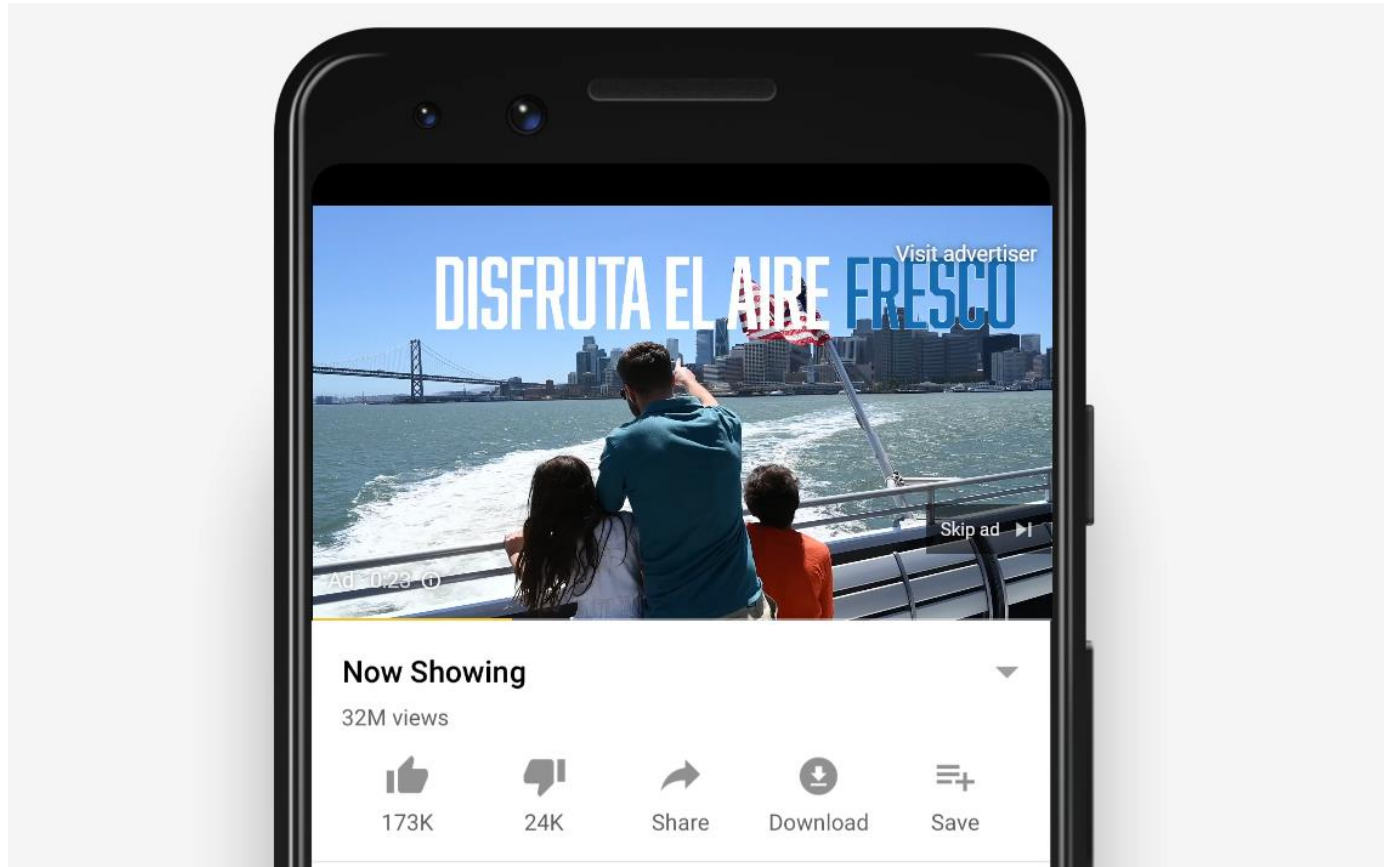
[LEARN MORE](#)



 **San Francisco Bay Ferry**  
A SERVICE OF WETA

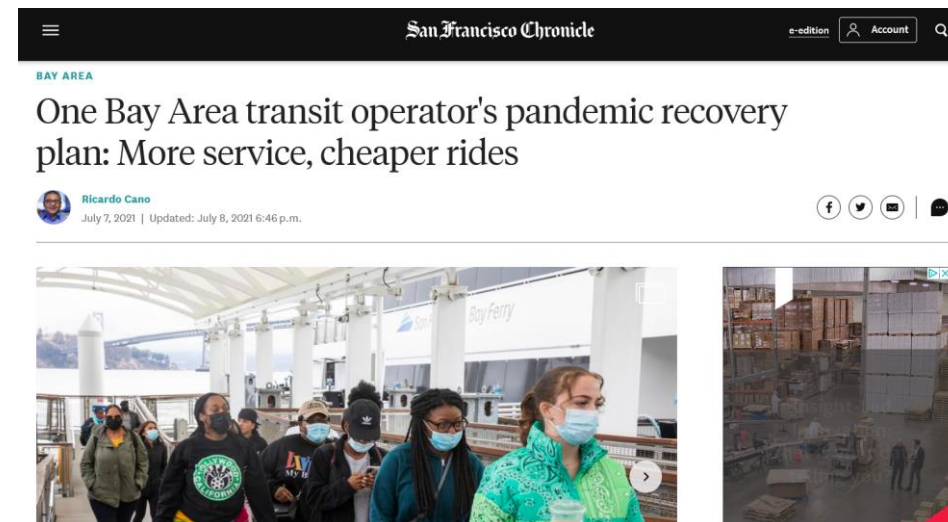
# SOCIAL VIDEO & SEARCH

WETA



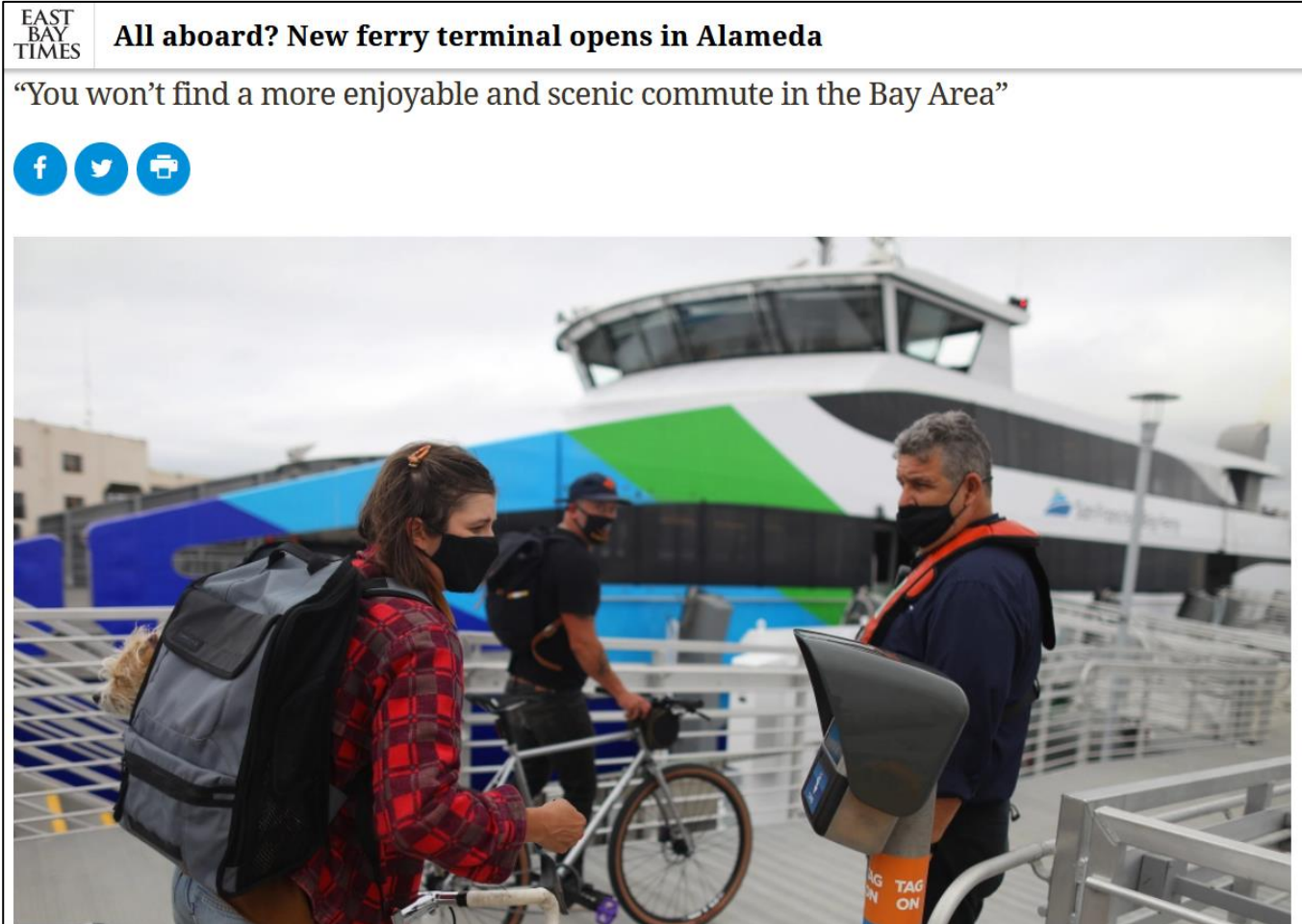
# MEDIA COVERAGE

- Heavy and positive coverage throughout launch period and continuing into fall
- Three local T.V. crews, print and news radio at Alameda Seaplane on July 1





## MEDIA COVERAGE



## LESSONS LEARNED

- More resources for and marketing targeted at Spanish-speaking potential passengers
- Social video can be affordable and highly effective for us
- Search is worth continuing to explore, potentially as an ongoing campaign to continue to build awareness with good cost efficiency

## COMMUNITY OUTREACH

- Firms specializing in local community outreach are in planning and early implementation stages
  - Heavy focus on promoting Clipper START, our lower fares and less commute-focused schedules
  - Multi-lingual, culturally relevant outreach
- Tabling and outreach at multi-family communities short distances from ferry terminals
- Community events are ramping up post-Delta



## DID IT WORK?

- July 1 was our biggest non-holiday since March 2020
- Weekday ridership rose 77% from June to July 2021
- Weekend ridership from July through September was about 60% of pre-pandemic
- After Delta dip, weekday commute ridership has continued to climb
- For October: 104% of pre-pandemic seasonal average on weekends and 35% on weekdays

## WHAT'S NEXT?

- Continue work on community outreach campaigns
- Supplemental advertising focused on the Oakland market
- Ramp up Spanish-language rider resources and marketing
- South San Francisco and Alameda Short Hop launches
- Prepare for any service/fare changes in FY23
- Passenger surveying program for FY22 underway

## OCTOBER PASSENGER SURVEY

- Opt-in digital survey conducted in late October focused on current and lapsed riders
- 999 responses, 2/3rds of which are current riders
- **Current riders** cite ride quality, safety and cleanliness and avoiding traffic and parking as the biggest reasons why they are choosing the ferry currently, consistent with historical answers.



## OCTOBER PASSENGER SURVEY

- Most **lapsed riders** aren't currently commuting. Those who are largely drive alone and cite convenience and COVID fears as their rationale.
- Most **new riders** have come on board since July 2021, a strong indication of the impact and good timing of the PRP.
- Both **current and lapsed riders** expect to cross the Bay more frequently in 2022. The majority of lapsed riders say they will use the ferry to make these trips.

# OCTOBER PASSENGER SURVEY

- We saw an increase in riders who report annual household incomes of less than \$50,000 compared to prior surveys (6% in 2017, 10% in this survey).
- Future survey plans:
  - Early CY22: Fares/service level focused survey
  - Spring 2022: Onboard passenger survey (similar to prior years)
  - May 2022: Amenity survey
  - FY23: Triennial onboard passenger survey becomes annual

# **WATER EMERGENCY TRANSPORTATION AUTHORITY**