

Chapter 1: Existing Conditions

Service Area Profile

The study area, shown in Figure 1–1, is defined as the Tiburon Peninsula and includes the Town of Tiburon, the City of Belvedere, and the Census designated place (CDP) of Strawberry. The following sections describe the characteristics of the study area including demographic information and major activity centers.

Transportation Network

State Highway 131 (Tiburon Boulevard) provides the primary access to the Tiburon Peninsula, running between Highway 101 and the easternmost point of the Peninsula by the ferry dock. This highway is on the south side of the peninsula and is four lanes between Highway 101 and Trestle Glen Boulevard before narrowing to two lanes into Downtown Tiburon and Belvedere. Running parallel to the two-lane portion of this roadway is an off-street multi-use path that experiences a significant amount of pedestrian and bicycle use.

North of Tiburon Boulevard, the Tiburon Peninsula is characterized by hilly terrain and narrow, winding roadways with relatively low-density development. These features greatly influence transportation throughout the area and provide many mobility challenges including challenging walking and biking environments and limited access for traditionally-sized transit vehicles (25-40 foot). Most roads within the study area are classified as local, with only a few arterials that circumscribe the peninsula. Roadway classifications are shown in Figure 1–1. Local roadways tend to be narrow, disconnected streets that serve residential areas, and many streets lack any sidewalks.

Demographics

The small populations of Belvedere and Tiburon generally tend to be affluent households with a high rate of home and car ownership, as well as significantly higher than average home values. The Strawberry CDP, however, is characterized by slightly lower incomes and more multi-family housing. The following sections provide more detail on various demographics within the study area.

Population and Age

The combined 2010 Census population of the three areas that make up the Tiburon Peninsula study area is 16,423, about 7% of the total population of Marin County. A breakdown of population for each of the three areas is shown in Table 1–1.

Over the past ten years, the populations of both Strawberry and Tiburon have grown somewhat, while Belvedere has experienced a decreasing population. In the last twenty years, Strawberry and Tiburon have also experienced significant population growths of about 20%. About half of the population of these areas is less than 18 years of age or 65 years of age or older. These represent age groups that tend to be more transit-dependent.

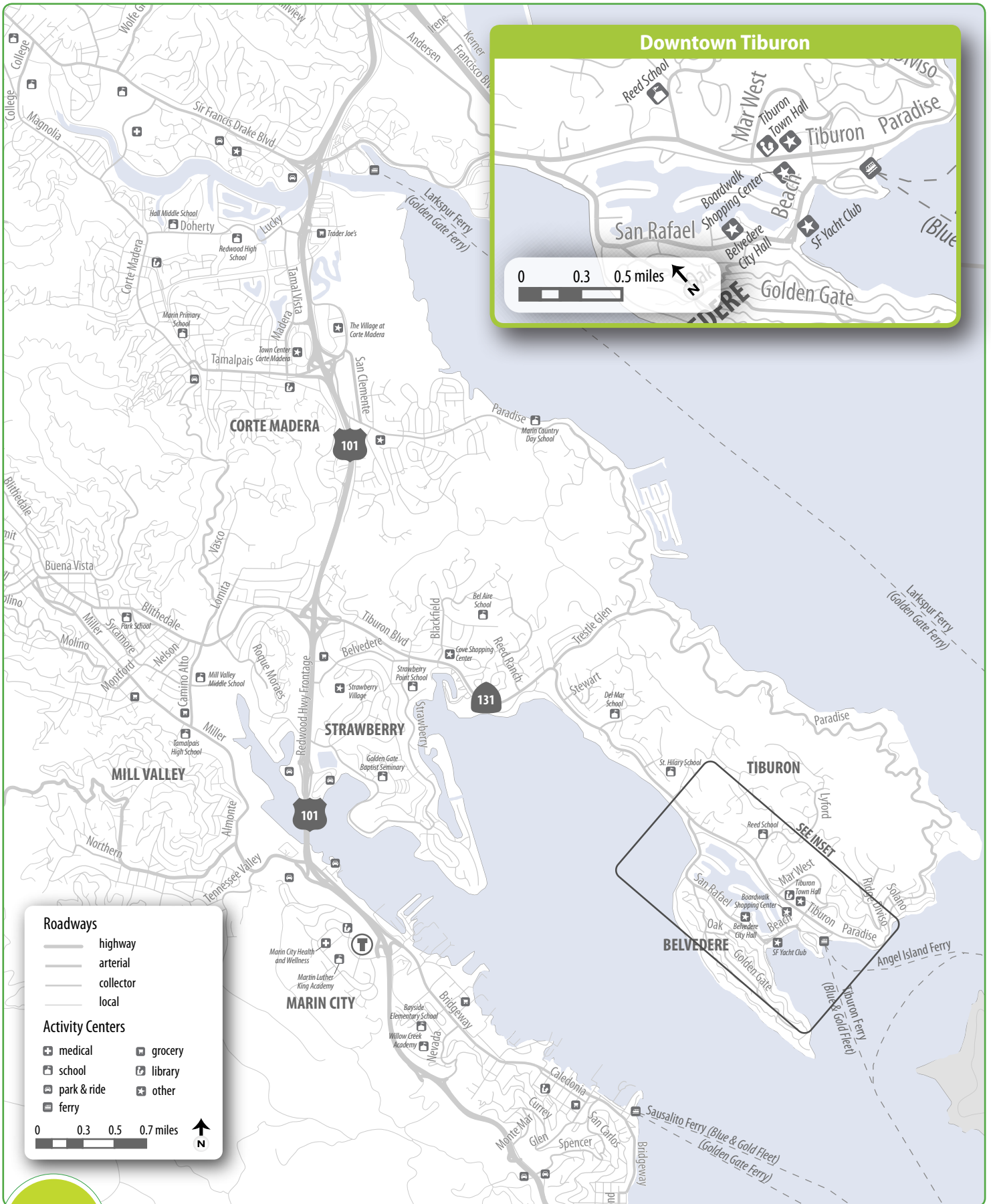


Figure 1-1: Tiburon Peninsula Study Area

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Table 1–1: Population by Age

	Belvedere	Strawberry	Tiburon	Total
Under 18 years old	443 (21.4%)	1,071 (19.9%)	2,150 (24.0%)	3,664 (22.3%)
Between 18 and 65 years old	972 (47.0%)	3,378 (62.6%)	4,914 (54.8%)	9,264 (56.4%)
65 years and older	653 (31.6%)	944 (17.5%)	1,898 (21.2%)	3,495 (21.3%)

Source: 2010 US Census

Housing

In 2010, there were an estimated 7,799 housing units within the combined study area. Only 12% of the housing units in Belvedere are multi-family units, compared to 27% in Tiburon and over 50% in Strawberry, similar to the rest of the county. Housing values are high in all three areas, and home ownership is slightly greater than the rest of the county in both Belvedere and Tiburon. Strawberry has a much lower home ownership rate of about 40% and generally smaller household size.

Employment

In 2010, the employment rate of the Tiburon Peninsula area was about 55%. Belvedere had a slightly higher rate of unemployment, as well as a higher percentage of population not in the labor force that includes those who are retired or considered unable to work. Of all employed residents in the study area, less than a fifth work within their city or place of residence and more than half work outside of Marin County.

Income

Median household incomes in Tiburon and Belvedere were significantly higher (67% and 34%, respectively) than the countywide average of \$87,728 while median income in Strawberry was about 12.8% lower than the countywide average but still higher than the statewide average of \$60,016. All three areas have poverty rates below the statewide average, with Belvedere having a very low rate of less than 1%.

Commute to Work

The majority of work trips from the Tiburon Peninsula are made by driving, either alone or in a carpool. About 10% of commuters in Belvedere and Tiburon use public transportation to get to work, while only 3% of residents in Strawberry use transit for their commute. Of public transportation users residing in Belvedere and Tiburon, the majority ride the ferry. In Strawberry, only 16% of transit commuters ride the ferry, while the rest are taking a bus. The distribution of modes used by commuters is shown in Table 1–2.

Table 1–2: Journey to Work Mode Share

	Belvedere	Strawberry	Tiburon
Drive Alone	419 (65.3%)	2,069 (77.2%)	2,254 (65.4%)
Carpool	55 (8.6%)	224 (8.4%)	333 (9.7%)
Public Transportation	69 (10.7%)	87 (3.2%)	333 (9.7%)
<i>Bus</i>	0 (0.0%)	73 (83.9%)	97 (29.1%)
<i>Subway/elevated</i>	6 (8.7%)	0 (0.0%)	16 (4.8%)
<i>Ferryboat</i>	63 (91.3%)	14 (16.1%)	220 (66.1%)
Bicycle	0 (0.0%)	9 (0.3%)	0 (0.0%)
Walk	29 (4.5%)	56 (2.1%)	86 (2.5%)
Other	11 (1.7%)	22 (0.8%)	22 (0.6%)
Worked at home	59 (9.2%)	213 (7.9%)	417 (12.1%)

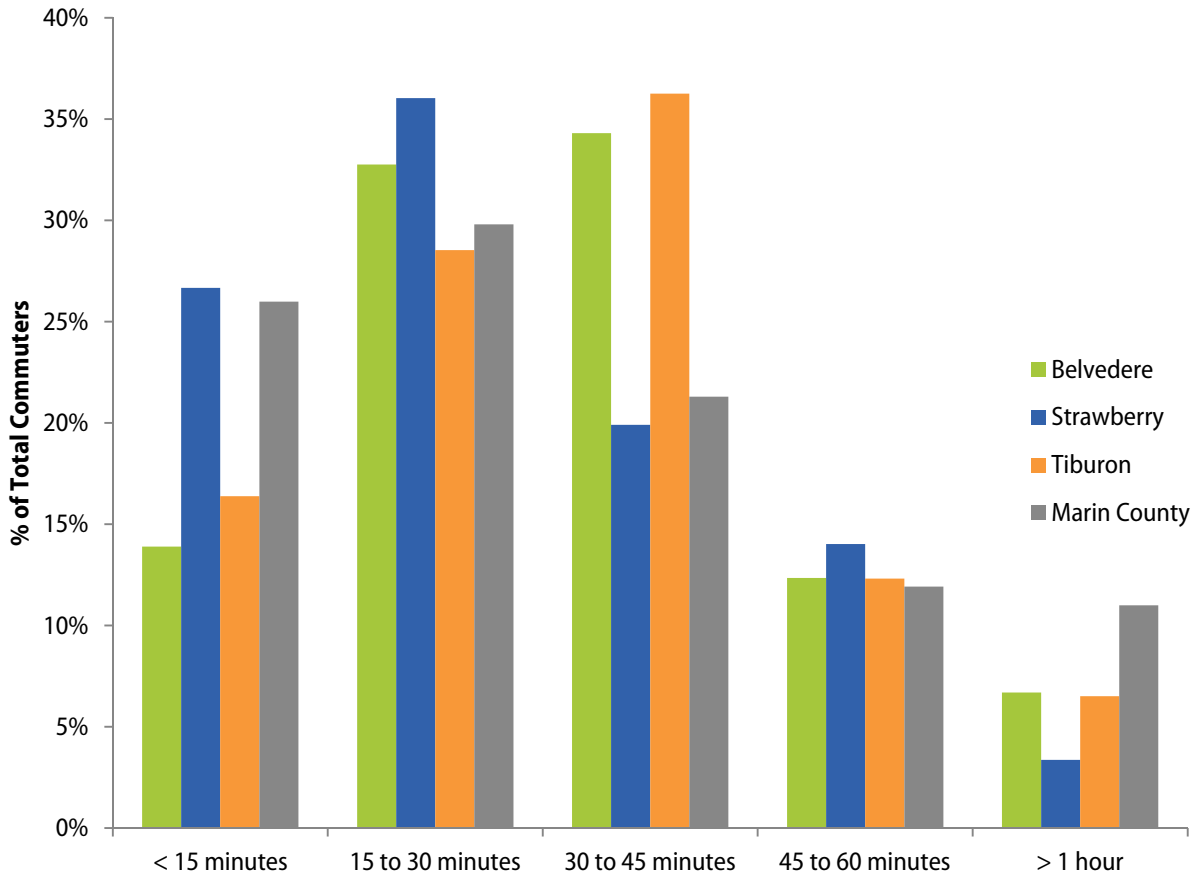
Source: 2010 American Community Survey

Average travel time to work for residents of the study area is about 25 to 30 minutes. The distribution of travel time to work is shown for the three areas, as well as for the county in Figure 1–2. Average commutes are shorter for residents of Strawberry, and the majority have travel times less than 30 minutes. Residents of Belvedere and Tiburon tend to have higher travel times to work, with about a third with commute times between 30 and 45 minutes. These longer commute times are consistent with the higher percentage of residents in Belvedere and Tiburon that work outside of Marin County and thus travel longer distances.

Vehicle Ownership

Rates of vehicle ownership are quite high in the study area. In 2010, about 98% of households owned one or more vehicles, higher than the countywide average. In Belvedere, less than 1% of households do not own a vehicle and the majority of households own at least two vehicles.

Figure 1–2: Travel Time to Work



Land Use

Existing land use within the Tiburon Peninsula is predominantly low-density residential, and both the City of Belvedere and Town of Tiburon are expecting to reach build-out population within the next 5-10 years. The Town of Tiburon Housing Element identifies sites for approximately 150 additional housing units, and the City of Belvedere identifies about 30 potential new units, about a 3% growth from the existing amount of housing in each jurisdiction.

The Town of Tiburon also recently completed the Downtown Vibrancy Project, aimed at identifying ways to revitalize the downtown commercial area. The report outlines both short- and long-term improvements to help address issues of parking and circulation, barriers to pedestrian access, and a sprawling development pattern that hinder economic activity.

Activity Centers

Figure 1–1 on page 1-2 provides a map of the Tiburon Peninsula study area including major activity centers and other points of significance. The activity centers identified as important to the transit planning process include major employment sites, schools, community facilities, and shopping and retail centers. Descriptions of these places are provided below.

Employment

There are a limited number of major employers and employment centers in the Tiburon Peninsula. The majority of employment establishments in Tiburon are professional, scientific, and technical services. While there are an average number of employers within the town, most of these establishments have very few employees. The larger employers tend to be within the accommodation and food services industry. Employment locations are generally concentrated around downtown Tiburon and Strawberry Village, the main areas zoned for office and commercial uses.

Schools

Both Belvedere and Tiburon are part of the Reed Union School District (RUSD), whereas Strawberry is within the Mill Valley School District (MVSD). The Reed Union School District service area also includes a portion of east Corte Madera. All three areas are also part of the Tamalpais Union High School District (TUHSD) and the Marin Community College District. In addition to the public schools serving the area, St. Hilary School is a private elementary and middle school located in Tiburon. Table 1–3 below lists the various schools that serve the communities within the Tiburon Peninsula.

Table 1–3: School Enrollments

School	Grades	Location	District	Study Area(s) Served	2011-12 Enrollment
Reed Elementary School	K–2	Tiburon	RUSD	Tiburon, Belvedere	507
Bel Aire Elementary School	3–5	Tiburon	RUSD	Tiburon, Belvedere	471
Strawberry Point School	K–5	Strawberry	MVSD	Strawberry	378
Del Mar Middle School	6–8	Tiburon	RUSD	Tiburon, Belvedere	425
Mill Valley Middle School	6–8	Mill Valley	MVSD	Strawberry	738
Saint Hilary School	K–8	Tiburon	--	--	250
Tamalpais High School	9–12	Mill Valley	TUHSD	Strawberry, Tiburon (limited)	1,110
Redwood High School	9–12	Larkspur	TUHSD	Tiburon, Belvedere	1,442
Tamiscal Alternative High School	9–12	Larkspur	TUHSD	Tiburon, Belvedere	98

San Andreas Alternative High School	9–12	Larkspur	TUHSD	Tiburon, Belvedere	98
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Reed Union School District, 2011-12; National Center of Education Statistics, 2009-10

Reed Union School District (K-8) has experienced an average of 7% growth over the past three years and is projected to continue on this upward trend. The next five years of growth estimates at the K-8 level estimate 5% annual growth or approximately another 350 students. As these students move onto high school, increased demand for transportation services to Redwood High, Tamalpais High or other private schools in Marin County will be experienced. Home origin locations for current Reed Union School District students are shown in Appendix B.

Other Activity Centers

Many community buildings are concentrated in downtown Tiburon and include city recreational facilities, Town Hall, the Belvedere-Tiburon Library, and US Post Office as well as numerous shopping centers, banks, and restaurants. Woodlands Market provides grocery services and is located in the downtown area. Larger grocery stores, including Safeway and Whole Foods, are located in Strawberry and Mill Valley. CVS and Fresh & Easy will soon open in downtown Tiburon and Paradise Cove, respectively, and provide additional pharmacy and grocery services.

Major parks in the study area include Paradise Beach County Park and the Richardson Bay Lineal Park that connects Blackie’s Pasture to Cypress Grove Garden Park through a multi-use path. There are limited activity centers within Belvedere aside from City Hall located in Belvedere Park.

Existing Transit Services and Facilities

Existing transit services within the Tiburon Peninsula include local fixed-route service (Marin Transit Route 19), regional fixed-route service (Golden Gate Transit Route 8), the Blue and Gold Ferry, and Marin Access Paratransit service. In addition, the Angel Island Ferry provides recreational ferry service to Angel Island State Park. The fixed-route services along with designated stops and transfer locations are shown in Figure 1–3.

Transfer opportunities are also available to other Marin Transit Local routes at Strawberry Village (Reed Boulevard & Belvedere Drive). Passengers can connect to Route 17, which runs between San Rafael, Strawberry, Mill Valley, and Marin City, or Route 22, which runs between San Rafael, San Anselmo, Strawberry, Marin City, and Sausalito with connections to College of Marin and the San Anselmo Hub. Golden Gate Transit regional Route 8 and Route 10 also serve this stop in Strawberry and provide service to San Francisco.

Residents can also connect from Route 19 to the Marin Airporter at the Seminary Drive Bus Pad. Both the Seminary Bus Pad and the Tiburon Bus Pad, which are located along US-101 at Tiburon Boulevard, are served by Marin Transit Routes 22, 36, and 71 and regional Golden Gate Transit Routes 10, 18, 24, 70 and 80.

Marin Transit Fixed Route (Local)

Marin Transit Route 19 is a fixed-route service that operates between Tiburon, Strawberry, and Marin City. The route serves downtown Tiburon and Strawberry Village and has limited trips in the morning and afternoon that also serve Belvedere and Redwood High School. Route 19 operates on both weekdays and weekends from about 7:00 a.m. to 11:00 a.m. and 2:00 p.m. to 7:30 p.m., with 60 minute headways. A final trip is made from Strawberry to Marin City at 9:00 p.m., which originates as Route 17.

Fares

One-way fixed-route fares are \$2.00 for adults (ages 19–64), and \$1.00 for youth (ages 6–18), seniors (ages 65+), and disabled passengers. Up to two children age 5 and younger can ride free when accompanied by an adult. Free transfers are available between all Marin Transit and Golden Gate Transit routes within Marin County and are issued upon boarding.

Stored value cards in \$18 and \$36 denominations can be purchased and are valid trip within Marin County. These cards also provide a 10% discount off the regular adult cash fare. Daily, weekly, and monthly passes are available and allow for unlimited rides within Marin County during the valid time period. The Bay Area’s regional transit fare media card, Clipper, is also available on all fixed route services. Pricing information for these passes is shown in Table 1–4.

Table 1–4: Marin Transit Local Fares

	Cash Fare	Stored Value Card	1-Day Pass	7-Day Pass	31-Day Pass
Adult	\$2.00	\$1.80	\$5.00	\$20.00	\$80.00
Youth (ages 6–18)	\$1.00	\$1.00	\$2.50	\$10.00	\$40.00
Seniors (ages 65+)	\$1.00	\$1.00	\$2.50	\$10.00	\$25.00
Persons with disabilities	\$1.00	\$1.00	\$2.50	\$10.00	\$25.00
Children under 6 (must be accompanied by an adult)	Free	Free	Free	Free	Free

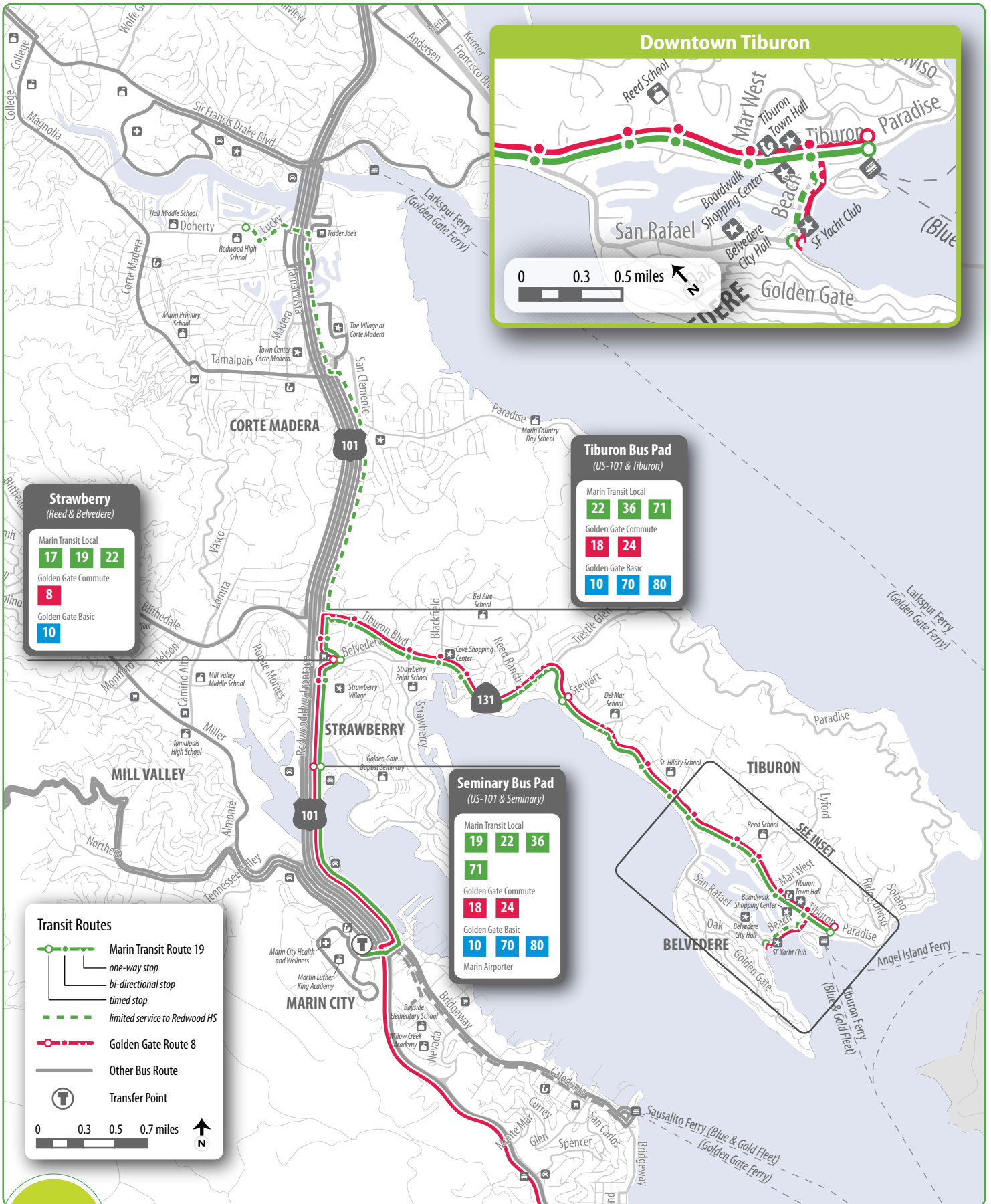


Figure 1-3: Existing Transit Services

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Golden Gate Fixed Route (Commute)

Golden Gate Transit Route 8 is a regional commute bus route that operates between Belvedere, Tiburon, Strawberry, and San Francisco. Within the study area, the route serves the same stops as Route 19 through Tiburon and Strawberry followed by the Spencer Ave bus pad and continuing along US-101 to San Francisco. The service operates Monday through Friday except on holidays, with two southbound trips in the morning between 6:30 a.m. and 8:30 a.m. and one northbound trip in the evening from 5:00 p.m. to 6:30 p.m.

Fares

Fares on Golden Gate Transit services depend on the distance traveled, as shown in Table 1–5. The Tiburon Peninsula study area is located within Zone 2.

Youth (ages 6–18), seniors (ages 65 and over), disabled passengers, and Medicare card holders receive a 50% discount off the adult cash fares. Up to two children ages 5 and under ride free when accompanied by an adult. Passengers can also receive a 20% discount when using a Clipper card. Marin Transit Value Cards can also be used for travel within Marin County.

Table 1–5: Golden Gate Transit Adult Cash Fares

Zone	To/From Tiburon Peninsula	
San Francisco	1	\$4.25
	2	\$2.00
Marin County	3	\$2.00
	4	\$2.00
	5	\$6.50
Sonoma County	6	\$7.50

Source: Golden Gate Transit Guide, Spring 2012

Blue and Gold Ferry

The Blue & Gold Fleet offers service between the Tiburon Ferry Terminal, located at Main Street and Tiburon Boulevard, and San Francisco, including both the Ferry Building and Pier 41. During the winter season, from November to April, there are seven commute service trips between Tiburon and the Ferry Building in each direction during the weekdays, and four to five regular service trips in each direction between Tiburon and Pier 41 daily. From May through October, some regular service trips also serve the Ferry Building, in addition to Pier 41. Commute services to the Ferry Building generally run from 5:30 a.m. to 8:00 p.m. and regular services to Pier 41 run from about 9:30 a.m. to 8:30 p.m. During the summer season, an additional late evening trip is provided on Fridays, which runs until 10:00 p.m.

Fares

One-way fares are \$10.50 for adults (ages 13–64), and \$6.25 for children (ages 5 – 12) and seniors (ages 65 and over). Children under 5 can ride free when accompanied by a paying adult. Tiburon 20-ticket commute books are also available for \$140.

Marin Access Paratransit

Marin Access provides door-to-door ADA paratransit services within Marin County and is operated under contract by Whistlestop Wheels. All passengers must be ADA-certified and meet certain eligibility criteria. In accordance with ADA, mandated paratransit services operate during the same hours and days of the week as comparable local bus service. Service is provided within $\frac{3}{4}$ -mile of existing non-commute bus routes during the hours that they are in operation. Service beyond the $\frac{3}{4}$ -mile buffer or beyond the hours of operation for the route is also available for an additional fare. Trip reservations must be made at least one day in advance, and can be made up to a week ahead of time. All ADA mandated trips are scheduled within one hour before or after the requested time.

Fares

One-way fares for a local ADA paratransit trip that begins and ends within the regular service area is \$2.00, either in cash or with a ticket that can be purchased in books of 10. One-way fares for a trip that begins or ends outside of the regular service area is \$2.50. Regional paratransit fares for service outside of Marin are higher (and based on the zone fare system of the regional transit provider Golden Gate Transit).

Existing Transit Use

The following sections summarize ridership and performance of the existing transit services described above. Current transit user profiles are also presented, which includes the results of onboard surveys conducted for Route 19 and the Blue & Gold ferry, as well as other passenger information,

Marin Transit Route 19*Existing Ridership*

Route 19 is the lowest producing local bus in the Marin Transit system in terms of both total passengers and passengers per hour. The overall 15.4 passenger per hour productivity level falls short of the agency's current 20.0 passenger per hour performance standard. Isolating the two morning and two afternoon trips that serve Redwood High School, productivity on these four trips is approximately 45 passengers per hour, well above the productivity standard. The remaining weekday service (non-school trips) averages 14 passengers per hour and weekend services averages 9.5 passengers per hour.

Ridecheck data includes daily boarding and alighting activity at each stop and was collected along Route 19 during October 2011. Maps indicating average daily boardings and alightings at each of the stops are shown in Figure 1–4 and Figure 1–5, for weekday and weekend respectively. A table of average daily boardings and alightings is provided in Appendix A.

Average weekday ridership on Route 19 is about 345 passengers per day, and average weekend ridership is about 280 passengers per day. The majority of boarding activity as well as total activity during the weekday was observed at Redwood High School, and this stop is served by only four trips per day. The high ridership at this stop is attributed to significant service demand among high school students. The average amount of daily boardings at this stop is also significantly higher than alightings, indicating that more students are taking only the afternoon service at the end of the school day. The final stop at Tiburon Boulevard and Main Street has the highest proportion of alightings, probably due to a combination of transferring passengers and passengers with final destinations within downtown Tiburon.

During the weekend, ridership activity, particularly the amount of boardings, increases significantly at Marin City Transit Hub and the intersection of Reed Boulevard and Belvedere Drive near Strawberry Village. The majority of total boarding and alighting activity, as well as the highest percentage of alightings, occurs at Tiburon Boulevard and Main Street during the weekend.

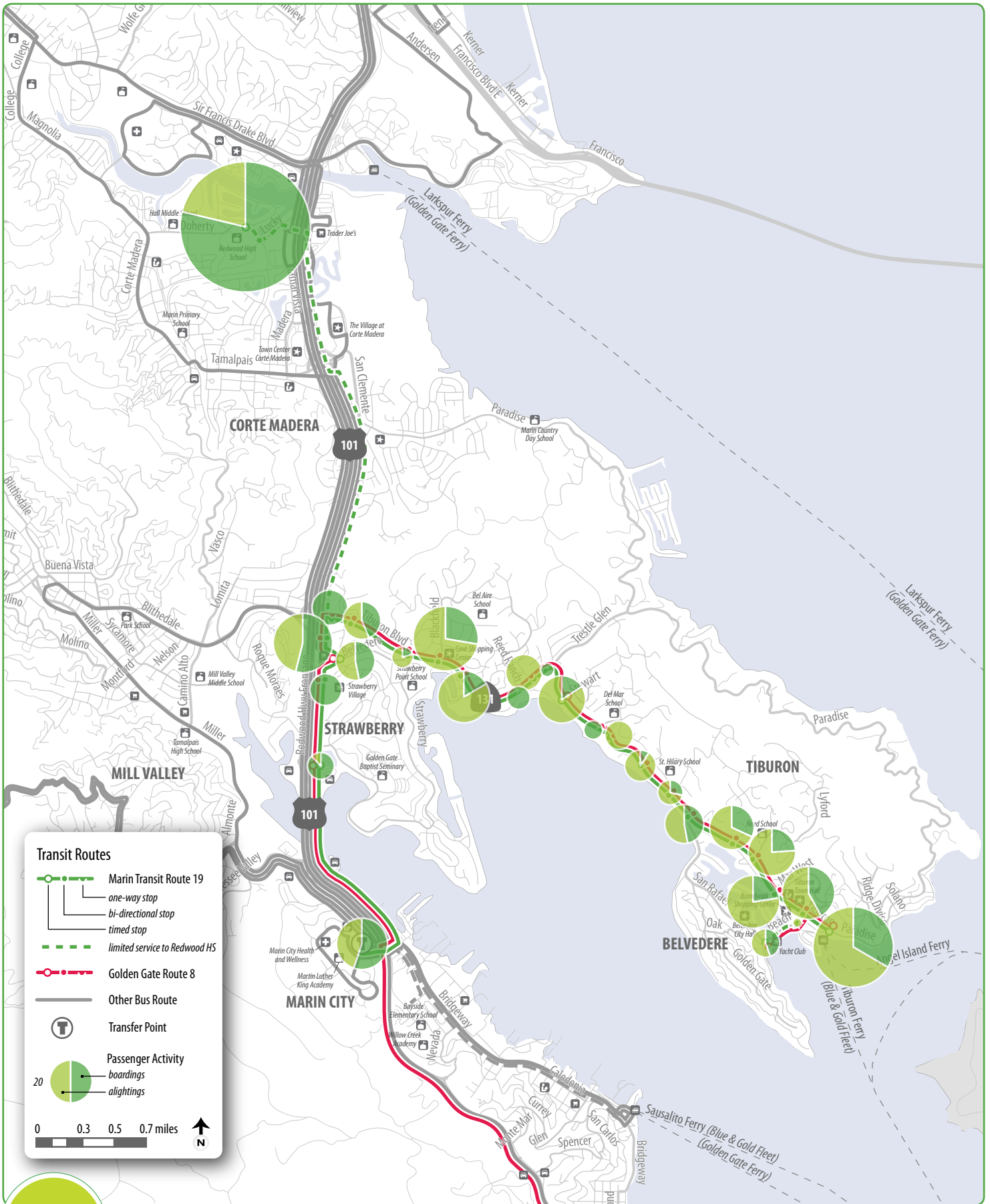


Figure 1-4: Marin Transit Route 19 – Weekday Boardings and Alightings

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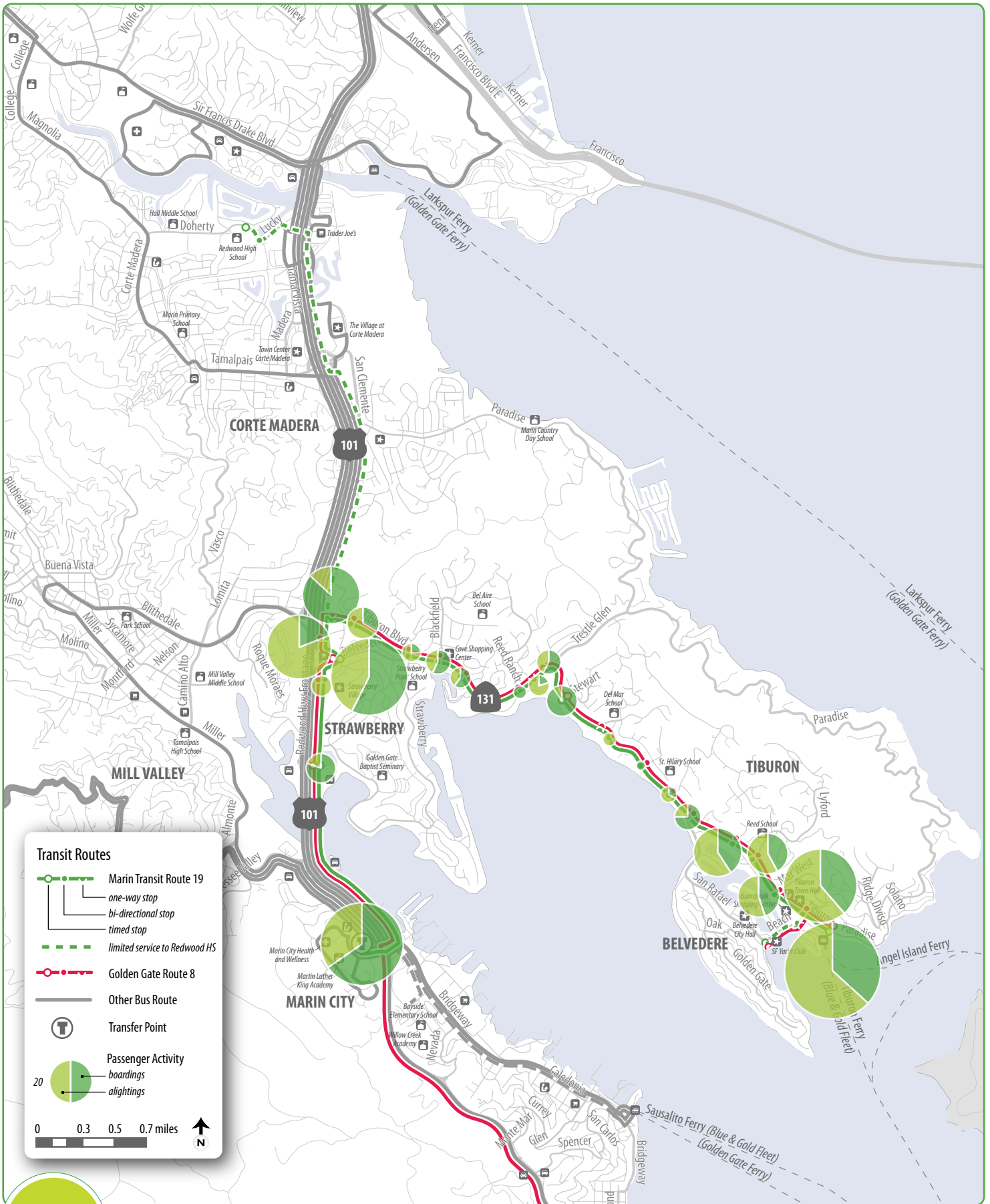


Figure 1-5: Marin Transit Route 19 – Weekend Boardings and Alightings

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Performance Measures

Table 1–6 below shows a summary of various performance measures for Route 19 over the past three years. These measures give an indication of the productivity and cost effectiveness of the service. Revenue hours were reduced significantly between FY2009-10 and FY2010-11. This reduction corresponds to a similar decrease in operating cost and passengers, as well as passenger revenues. Passengers per revenue hour, an indicator of service efficiency, has increased steadily over the past three years but still remains below the agency’s target of 20 passengers per hour. The average cost per revenue hour, an indicator of the cost effectiveness of the service, has also increased due to increasing costs to operate the service. Over the last year, average subsidy per passenger and farebox recovery have remained relatively constant and fall short of the agency’s \$5.00 per passenger subsidy target.

Table 1–6: Marin Transit Route 19 Performance Measures

	FY2008-09	FY2009-10	FY2010-11
Passengers	78,770	84,828	72,989
% Change		7.7%	-14.0%
Revenue Hours	6,458	6,190	4,746
% Change		-4.1%	-23.3%
Operating Costs	\$751,408	\$809,720	\$698,604
% Change		7.8%	-13.7%
Passenger Revenue	\$78,182	\$99,661	\$84,649
% Change		27.5%	-15.1%
Operating Subsidy	\$673,226	\$710,059	\$613,955
% Change		5.5%	-13.5%
Passengers per Revenue Hour	12.2	13.7	15.4
% Change		12.3%	12.2%
Subsidy per Passenger	\$8.55	\$8.37	\$8.41
% Change		-2.1%	0.5%
Cost per Revenue Hour	\$116.36	\$130.81	\$147.20
% Change		12.4%	12.5%
Farebox Recovery	10.4%	12.3%	12.1%
% Change		18.3%	-1.6%

Golden Gate Route 8

Existing Ridership

Boarding and alighting information on Route 8 was obtained from Golden Gate Transit to further understand the commute market use the bus in Tiburon. Over the past year, average daily ridership was about 13 passengers per trip (only one trip) in the northbound direction and 45 passengers, or 22 passengers per trip, in the southbound direction.

In the southbound direction, the majority of boarding activity occurs in Strawberry, at Reed Boulevard & Belvedere Drive, followed by the Spencer Avenue Bus Pad. In the northbound direction, the majority of alighting activity occurs at Tiburon Boulevard & Greenwood Cove Road and at Reed Boulevard & Belvedere Drive. These observations indicate that many using the commute bus provided for the study area are getting on and off at locations outside Tiburon.

Performance Measures

A summary of performance measures over the past three years is shown for Route 8 in Table 1–7 below. Revenue hours were reduced significantly from FY2008-09 to FY2009-10 and then restored the following year. Fluctuations in operating costs and passenger revenues were consistent with this change. However, total ridership has been steadily decreasing over the past three years, resulting in drops in passengers per revenue hour and farebox recovery as well as increases in cost per hour and passenger subsidy.

Table 1–7: Golden Gate Route 8 Performance Measures

	FY2008-09	FY2009-10	FY2010-11
Passengers	21,639	17,153	14,533
<i>% Change</i>		-20.7%	-15.3%
Revenue Hours	1,314	1,025	1,068
<i>% Change</i>		-22.0%	4.2%
Operating Costs	\$394,601	\$289,814	\$371,313
<i>% Change</i>		-26.6%	28.1%
Passenger Revenue	\$60,818	\$45,278	\$45,545
<i>% Change</i>		-25.6%	0.6%
Operating Subsidy	\$333,783	\$244,536	\$325,768
<i>% Change</i>		-26.7%	33.2%
Passengers per Revenue Hour	16.5	16.7	13.6
<i>% Change</i>		1.6%	-18.7%
Subsidy per Passenger	\$15.43	\$14.26	\$22.42
<i>% Change</i>		-7.6%	57.2%

Cost per Revenue Hour	\$300.32	\$282.75	\$347.67
% Change		-5.9%	23.0%
Farebox Recovery	15.4%	15.6%	12.3%
% Change		1.4%	-21.5%

Source: Golden Gate Transit

Blue and Gold Ferry

Ridership

Total annual ridership in 2011 on the Blue & Gold Fleet regular and commuter services between Tiburon and San Francisco is summarized in Table 1–8. Ridership on commute services makes up about 60% of total ridership, and annual ridership on regular services is split fairly evenly between weekdays and weekends. Commute services average about 625 riders per day, while regular services average 200 riders per weekday and 480 riders per weekend.

Table 1–8: Blue & Gold Tiburon Ferry Ridership

Service	Average Weekday	Average Weekend	Annual Weekday	Annual Weekend
Commute	625	-	162,232	-
Regular	200	480	55,468	50,664
Total	825	480	217,700	50,664

Source: Blue and Gold Fleet, February 2012

Overall ridership also varies significantly depending on the season, mostly due to added frequency of service and to changes in weather. While commute service ridership experiences slight increases during the summer, ridership on the regular Tiburon–San Francisco service peaks around July with over three times the amount of riders monthly than in the winter months. Figure 1–6 shows the variation in monthly ridership in 2011 for the ferry services.

Figure 1–6: Blue & Gold Tiburon Ferry Monthly Ridership

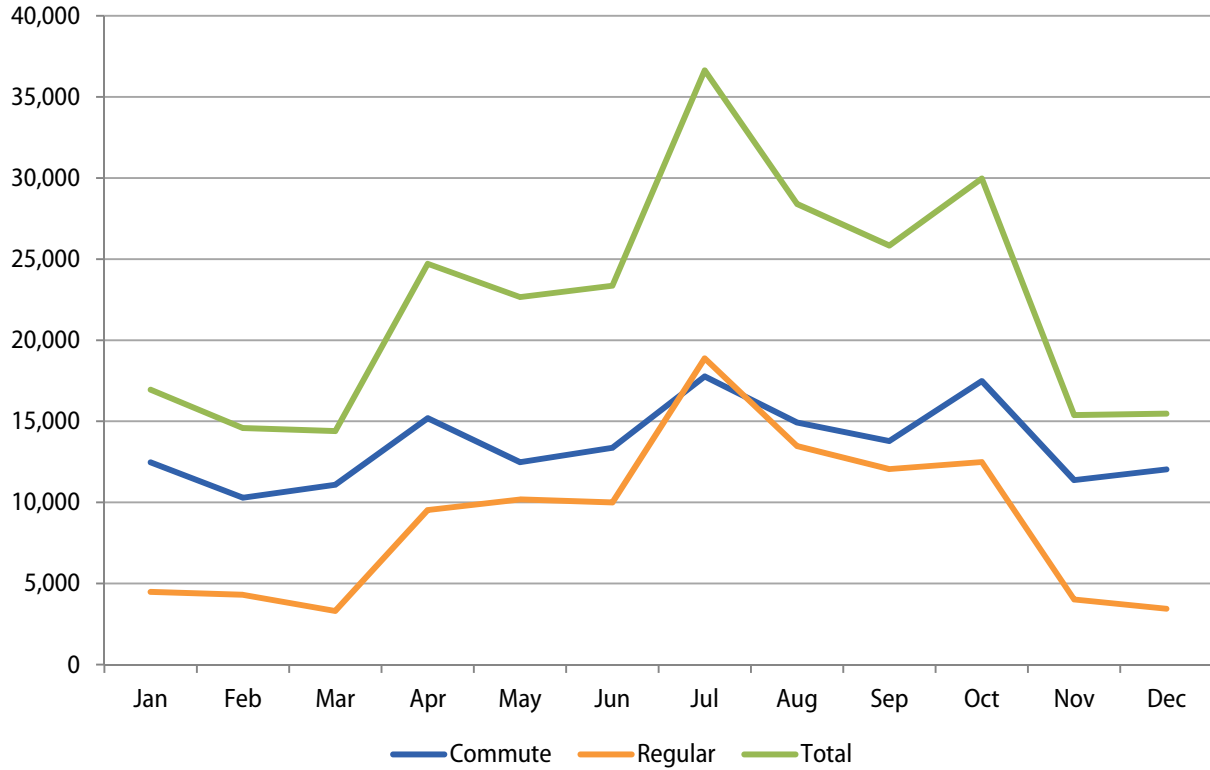


Table 1–9 below shows average monthly ridership by sailing time on the Tiburon ferry commute services for morning trips to San Francisco and evening trips to Tiburon. Peaks in ridership occur during the morning commute around 7:50 a.m. and during the evening commute around 5:25 p.m.

Table 1–9: Blue & Gold Tiburon Commute Ridership by Trip Time

Sailing Time ⁽¹⁾	Average Monthly Passengers
Tiburon to San Francisco	
6:00 a.m.	444
6:50 a.m.	1,038
7:50 a.m.	2,338
8:45 a.m.	1,480

San Francisco to Tiburon	
4:25 p.m.	1,602
5:25 p.m.	2,232
6:15 p.m.	1,399
7:15 p.m.	607

Notes:

1. Sailing Times vary slightly between Summer/Fall and Winter/Spring seasons

Source: Blue & Gold Fleet, 2011

Marin Access Paratransit

Ridership

In FY2010-11 4,023 trips were made on paratransit with origins or destinations in the Tiburon Peninsula, comprising about 4% of all paratransit trips in Marin County. This amounts to an average of about 11 trips per day.

Transit User Profiles

Onboard surveys were conducted on Marin Transit Route 19, as well as the Blue and Gold Fleet ferry service to and from Tiburon. These surveys were used to collect information on passenger travel patterns, including origin and destination, as well as opinions regarding existing transit service options and demographic information. Table 1–10 below summarizes some of the results of these surveys, as well as the results of an onboard survey conducted in 2008 for Golden Gate Route 8, for comparison.

Table 1–10: Passenger Profile by Service

	Marin Transit Route 19	Golden Gate Route 8	Blue & Gold Fleet Tiburon Ferry
Access Mode			
Walk	72%	82%	63%
Drive	1%	16%	11%
Transit	18%	0%	5%
Bicycle	1%	2%	8%
Dropped Off	6%	2%	8%
Other	2%	0%	5%

	Marin Transit Route 19	Golden Gate Route 8	Blue & Gold Fleet Tiburon Ferry
Trip Purpose			
Work	64%	96%	90%
School	4%	2%	4%
Medical	2%	2%	0%
Shopping	9%	0%	0%
Recreational/Social	16%	0%	4%
Other	5%	0%	3%
Age			
17 years or younger	6%	0%	0%
18 to 24 years	16%	2%	1%
25 to 44 years	35%	43%	30%
45 to 64 years	38%	53%	45%
65 years and over	5%	2%	24%
Household Income			
Under \$25,000	66%	0%	1%
\$25,000 to \$49,999	23%	7%	3%
\$50,000 and over	11%	93%	96%
City of Residence			
Tiburon	18%	60%	83%
San Rafael	36%	0%	0%
Mill Valley	11%	31%	7%
Corte Madera	0%	2%	0%
Sausalito	2%	2%	0%
Other	33%	0%	10%

Source: Marin Transit Route 19 Onboard Survey, 2012; Golden Gate Regional Customer Study, 2008; Blue & Gold Fleet Onboard Survey, 2012

Route 19 Onboard Survey

The Route 19 onboard survey was distributed in October of 2011 and a total of 99 responses were collected. Figure 1–7 shows travel patterns of the respondents based on general transit planning zones. The majority of trips made on Route 19 began and ended within the Tiburon planning area, followed by San Rafael as a major origin and destination. San Francisco was also a major destination for respondents originating in Tiburon, and Marin City and the Canal were major origins for those with destinations in Tiburon.

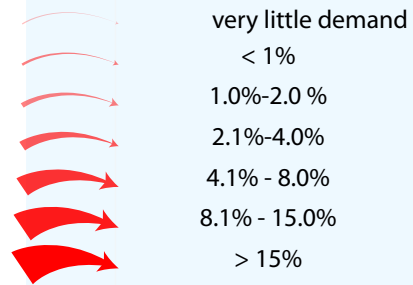
Figure 1–8 shows origin and destination locations indicated by survey respondents. Passengers generally start or end their trips in the Tiburon Peninsula, Mill Valley, or Marin City within a fairly close distance to the transit route. The highest concentration of origins and destinations is in downtown Tiburon.

The majority of respondents using Route 19 were traveling between home and work. Almost three-quarters of the respondents indicated that they do not have access to a personal vehicle, and about two-thirds walked to and from the bus stop. Over half of those surveyed indicated that they chose to ride the bus because of a lack of other travel options. About a quarter of respondents needed to transfer, either to get to the bus stop or to their final destination.

Two-thirds of the respondents have annual household incomes less than \$25,000, and about 90% have incomes less than \$50,000. The majority of riders surveyed are between the ages of 25 and 64, and only 5% are 65 and older.

		trips from / trips to	
LOCAL (MARIN COUNTY)	1	Novato	3% / 0%
	2	Marinwood - Terra Linda	3% / 0%
	3	Central San Rafael	8% / 7%
	4	Canal	11% / 3%
	5	San Anselmo - Fairfax - Ross	0% / 0%
	6	Larkspur - Corte Madera	1% / 0%
	7	Mill Valley - Tam Junction	5% / 1%
	8	Strawberry - Tiburon - Belvedere	17%
	9	Marin City	7% / 4%
	10	Sausalito	1% / 0%
	11	West Marin South (Stinson Beach - Bolinas)	0% / 0%
	12	West Marin North (Pt. Reyes Station - Olema)	0% / 0%
REGIONAL	13	SONOMA COUNTY	1% / 0%
	14	EAST BAY (CONTRA COSTA CO. - ALAMEDA CO.)	0% / 1%
	15	SAN FRANCISCO	4% / 7%

% OF TOTAL TRANSIT DEMAND



SOURCE: 2010 MARIN TRANSIT ROUTE 19 ONBOARD SURVEY (N=99)



Figure 1-7: Marin Transit Route 19 Travel Demand Profile

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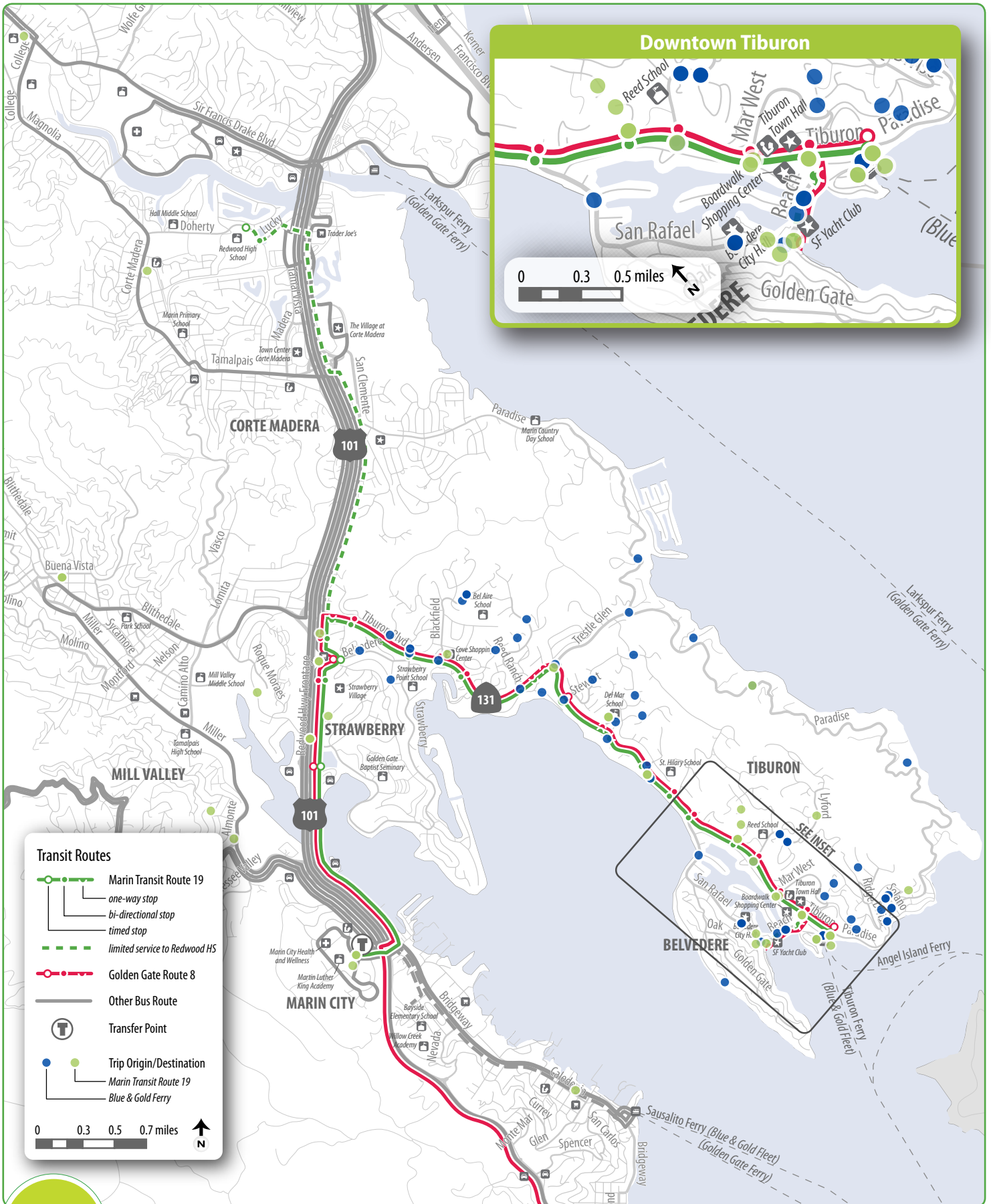


Figure 1–8: Marin Transit Route 19 and Blue & Gold Ferry – Origins and Destinations

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Blue and Gold Ferry Survey

The Blue & Gold Fleet onboard survey was distributed in January 2012 and a total of 84 responses were collected. The majority of trips reported were between San Francisco and the Tiburon planning area, specifically Tiburon and Belvedere. A small number of trips, about 2%, were also being made to destinations in Mill Valley. Figure 1–8 on page 1-23 shows origin and destination locations indicated by survey respondents. Overall, passengers are mostly starting or ending their trips within the Tiburon Peninsula. There is a slight concentration of origins and destinations around downtown Tiburon, but most are scattered around Tiburon Boulevard and Paradise Drive.

An overwhelming majority, about 95%, of respondents were traveling between home and work. A small 2% of trips were being made for school, specifically to Golden Gate University. About half of the passengers surveyed walked to the ferry terminal or to their final destination, and about 15% were picked up or dropped off. Only 5% took transit (primarily Muni or BART on the San Francisco side) to or from the ferry.

Convenience and avoiding traffic or parking were cited as the main reasons for choosing to take the ferry. About three-quarters of respondents indicated that driving would be their alternative had the ferry service not been available. About 80% of passengers use the ferry five or more times per week, and 60% have been using the ferry for more than three years.

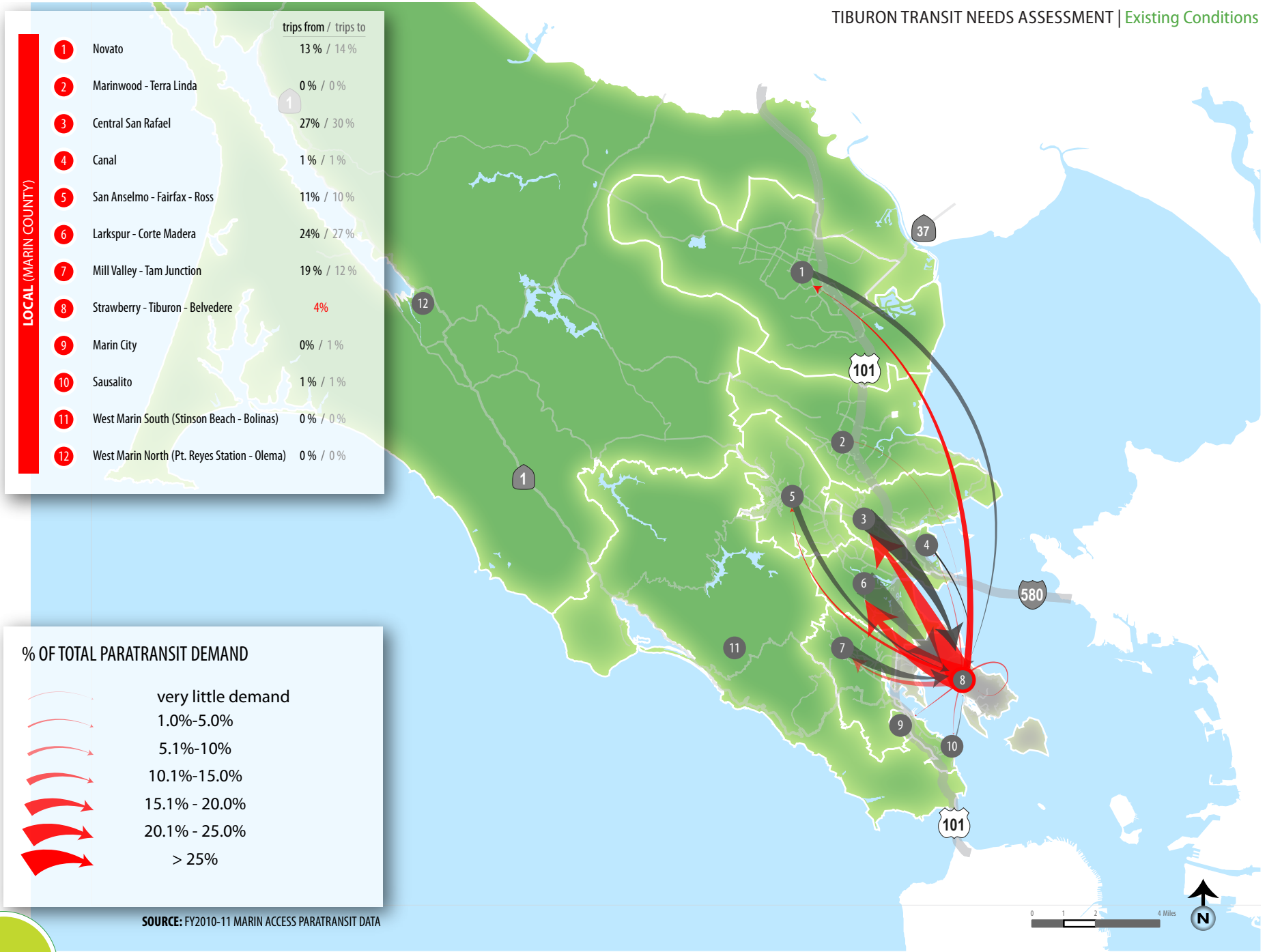
Survey respondents indicated that increased service frequency, closer stop locations, quicker travel-time, and more peak-hour service were the most important improvements that would influence them to use bus transit.

Almost all respondents have a valid driver license and access to a personal vehicle. About three-quarters are employed full-time, and none are unemployed. About 96% had annual household incomes greater than \$50,000, and almost a quarter of riders are 60 years or older.

Local Paratransit Travel Patterns

Local paratransit data from FY2010-11 was analyzed to determine travel patterns and major origin and destination locations. Figure 1–9 shows travel patterns based on general transit planning zones of paratransit users with origins or destinations in Tiburon, Strawberry, or Belvedere. Of the paratransit trips originating in the Tiburon study area, about a third had destinations in San Rafael. Other major destination locations include Corte Madera, Mill Valley, and Novato. For trips with destinations in the Tiburon Peninsula, San Rafael and Mill Valley are the major origins.

Figure 1–10 shows local paratransit trip origins within the Tiburon Peninsula. Origins are generally concentrated around downtown Tiburon, near the Cove Shopping Center, at Tiburon Boulevard and Blackfield Drive, and Strawberry Village along Redwood Frontage Road.



SOURCE: FY2010-11 MARIN ACCESS PARATRANSIT DATA



Figure 1-9: Local Marin Access Paratransit Travel Demand Profile

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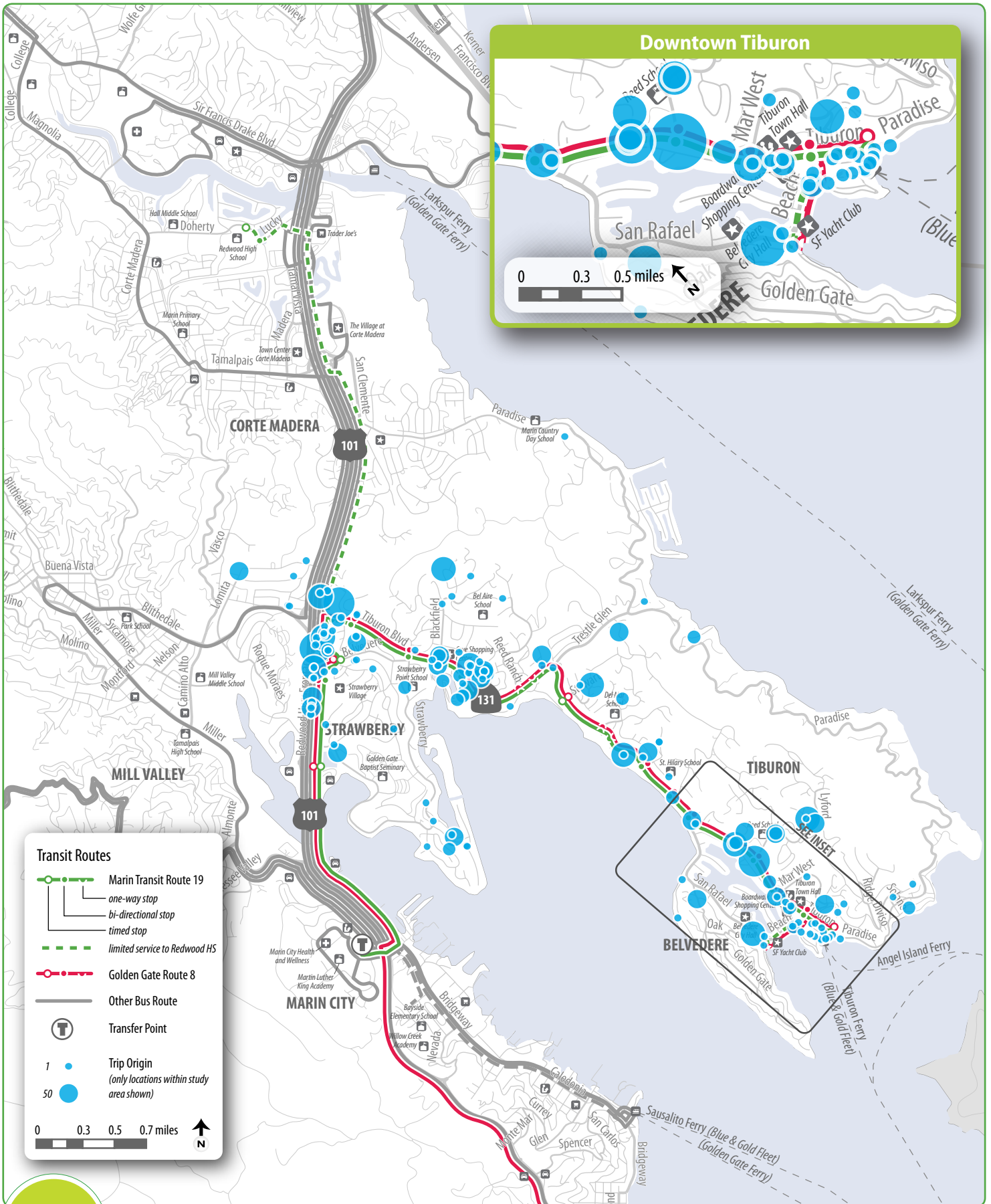


Figure 1-10: Local Marin Access Paratransit – Origins

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