



TREASURE ISLAND  
TRANSPORTATION SURVEY

# Results and Findings

TREASURE ISLAND MOBILITY MANAGEMENT AGENCY

APRIL 2015



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Except as noted, all data is from the 2014 Treasure Island Transportation Survey.

## Acknowledgements

### COMMUNITY PARTNERS

Catholic Charities  
 San Francisco Municipal Transportation Agency  
 Swords to Plowshares  
 Treasure Island Development Authority  
 Treasure Island Homeless Development Initiative

### STUDY TEAM

Barbary Coast Consulting  
 Caribou Public Relations



# 1. Overview and Methodology

## PURPOSE

The Treasure Island Community Transportation Survey was conducted in Fall 2014 in an effort to better understand the current transportation choices and patterns of Treasure Island residents, workers and visitors, as well as their future transportation needs. The results of this survey will help inform the transportation planning efforts for the upcoming residential and commercial development on Treasure Island.

Treasure Island. In addition, partner organizations including Swords to Plowshares and the Treasure Island Homeless Development Initiative (TIHDI) assisted in distributing and collecting surveys from additional housing program residents.

The survey team also executed two mobile surveying campaigns to augment the door-to-door effort. One took place at the TI community food pantry, where

## SURVEY METHODOLOGY

The Treasure Island Transportation Survey was distributed online and conducted in-person between September and November 2014. See Appendix 1 for list of full survey questions.

### Survey Preparation

Before the in-person survey effort began, the survey team prepared for survey operations by ensuring that as many TI residents as possible were notified about the survey.

- The survey team attended the August 20, 2014 Treasure Island/Yerba Buena Island Community Meeting to introduce the upcoming effort and conduct surveys in person at the meeting.
- The survey team also distributed palmcards (see Figures 1 and 2) to residents and businesses on Treasure Island. These palmcards described the survey and directed participants to the online survey.
- The week before the door-to-door effort began, partners with the Treasure Island Development Authority (TIDA) alerted TI housing providers that the TIMMA survey team would be conducting door-to-door outreach in TI residential neighborhoods and encouraged residents to participate in the survey.

### In-Person Survey Implementation

Surveyors speaking English, Spanish, and Chinese completed a door-to-door surveying effort, covering all residential neighborhoods of

Figure 1. Survey Palmcard (front)

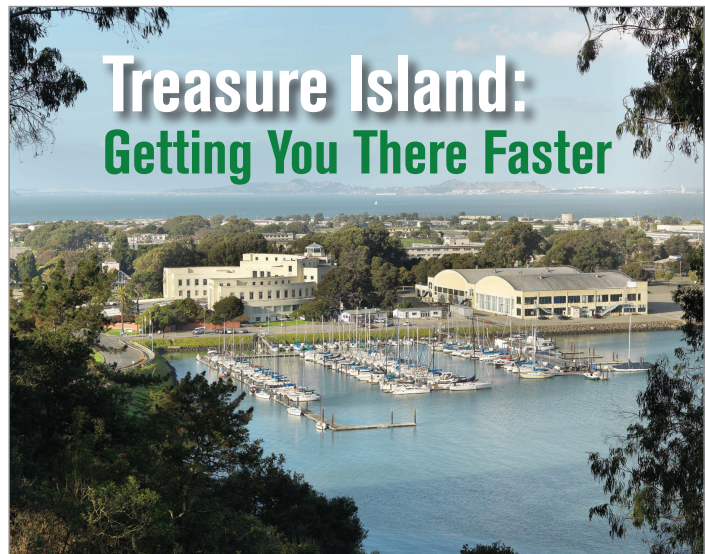


Figure 2. Survey Palmcard (back)

## THE FUTURE OF TREASURE ISLAND

New ferry service to San Francisco? More frequent buses? Bike-sharing? What would you like to see on Treasure Island?

Help shape the future of Treasure Island by telling us about your travel patterns, transit issues you currently face, and the new transit options you'd most like to see in the future.

Go online today to participate in a brief island-wide survey at: [www.TIMMA.org](http://www.TIMMA.org).

This survey is provided by the Treasure Island Mobility Management Agency (TIMMA). For more information, visit [www.TIMMA.org](http://www.TIMMA.org) or call (415) 593-1655.

Conteste una encuesta sobre el transporte en Treasure Island en [www.timma.org](http://www.timma.org). Llame la encuesta aqui: <http://svy.mk/Zjzaqu>

請在[www.timma.org](http://www.timma.org)填寫金銀島的交通問卷。  
請填寫問卷: <http://svy.mk/1m0EzwN>

POTENTIAL TRANSPORTATION IMPROVEMENTS

- New ferry service**
- Increased Muni service**  
**New AC Transit service**  
**Free island-wide shuttle**
- Bike share**
- Car share**

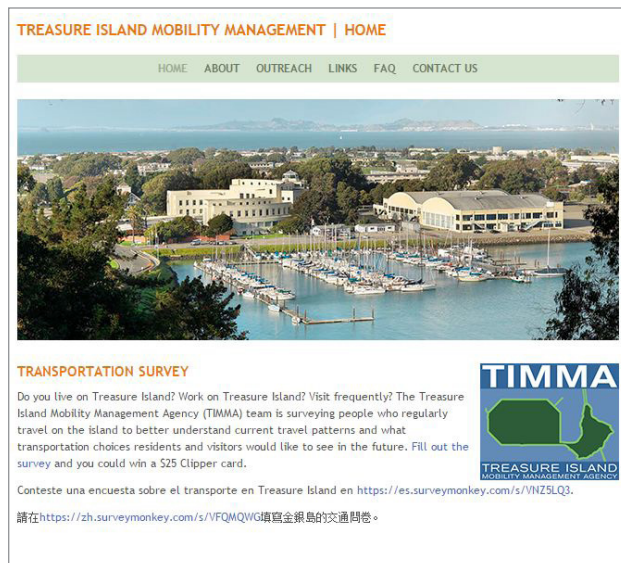
community members receive supplemental groceries each week. Community partners invited the TIMMA survey team to attend the weekly food pantry distribution and to approach residents while they waited in line. The survey team attended four food pantry distributions, surveying several dozen residents not reached in the door-to-door effort.

Secondly, the survey team approached travelers waiting at Muni 108 bus stops, through which a cross-section of residents, workers, and visitors were surveyed.

### Electronic Survey Implementation

An electronic version of the survey was created in English, Spanish, and Chinese. The online survey could be accessed on the TIMMA project website (Figure 3). Notifications about the survey, including links to the online survey, were included on the TIMMA survey palmcards, posted to the TIMMA website, and shared through Twitter and Facebook posts.

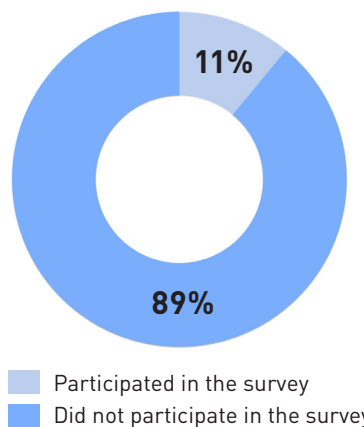
Figure 3. Screenshot of TIMMA Website



## 2. Respondent Demographics

Three months of online and in-person surveying resulted in more than 370 survey responses, which included residents, workers and visitors of Treasure Island. Of all participants, 77 percent were residents, 21 percent worked on Treasure Island and 2 percent were visitors. The survey reached about 11 percent of Treasure Island’s residential population, as about 285 of the survey participants were residents and TI has a population of about 2,600 people, according to data from the 2013 American Community Survey (ACS) (Figure 4).

Figure 3. Estimated Participation Rate of Treasure Island Residents



Data Sources: Treasure Island Transportation Survey, 2014; American Community Survey

### 3. Key Findings: Travel Patterns

#### VEHICLE OWNERSHIP

Findings of the Treasure Island Transportation Survey show that the majority of residents and workers on Treasure Island own or have regular access to a vehicle for travel on and off the island. Of residents, 61 percent reported owning or having access to a vehicle, while 74 percent of workers owned or had access to a vehicle (Figure 5). However, for comparison, data from the 2013 ACS indicates that about 83 percent of residents have access to a vehicle, while 17 percent do not.

Figure 4. Access to Vehicles, Residents and Workers

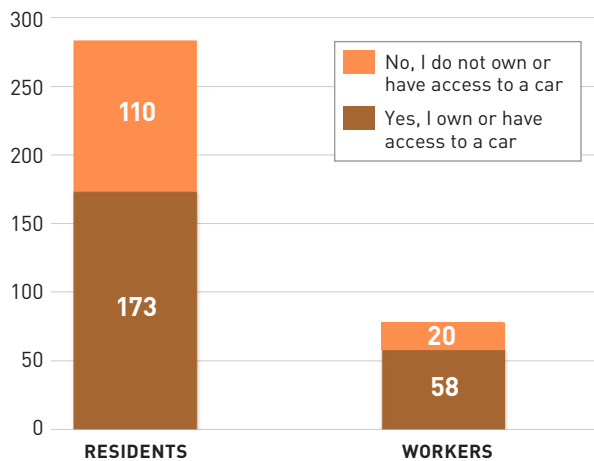
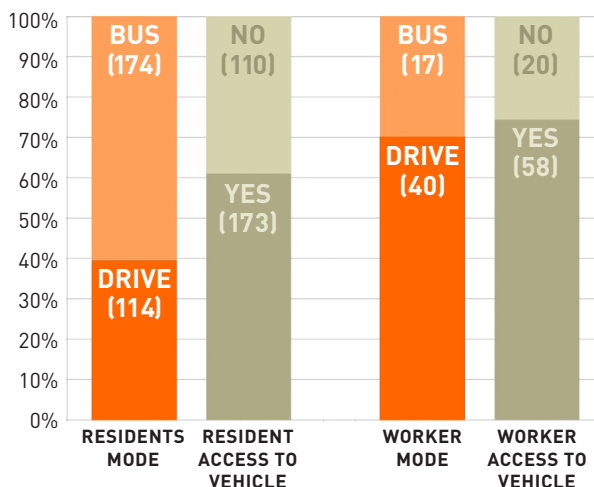


Figure 5. Mode On/Off Treasure Island by Vehicle Access and Residency



#### GETTING ON AND OFF THE ISLAND

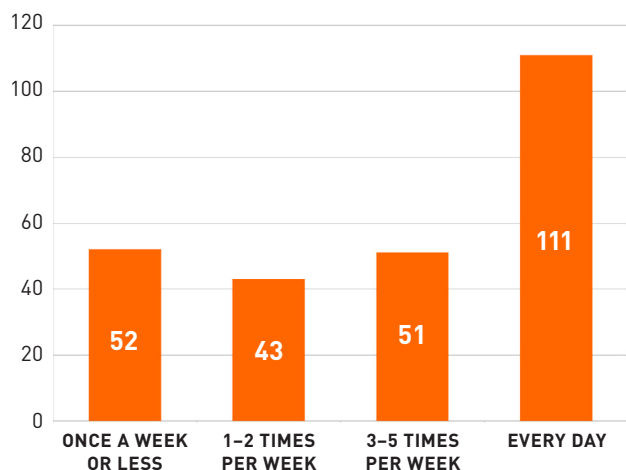
Survey results indicate that more than half of Treasure Island residents own or have regular access to a vehicle. Despite this, only about 40 percent of resident respondents reported driving for on and off-island travel. A majority—60 percent—of TI residents reported taking transit for on/off island trips.

Comparing residents and workers, we found that respondents who work on Treasure Island and own or have access to a vehicle represent a similar share as resident respondents but a much smaller share use transit to travel on/off the island (Figure 6).

This modal share is markedly different from ACS trip data, which indicates that 55 percent of residents typically commute by vehicle on/off Treasure Island, while 45 percent use transit. One key difference between the datasets, however, is that ACS data includes only trips to work, while the TI Transportation Survey asked respondents about all types of travel to and from the island.

When asked how often they commute from Treasure Island by vehicle, 111 respondents reported driving from Treasure Island daily. However, nearly 40 percent of respondents (95 respondents) reported driving 2 or fewer times per week (Figure 7).

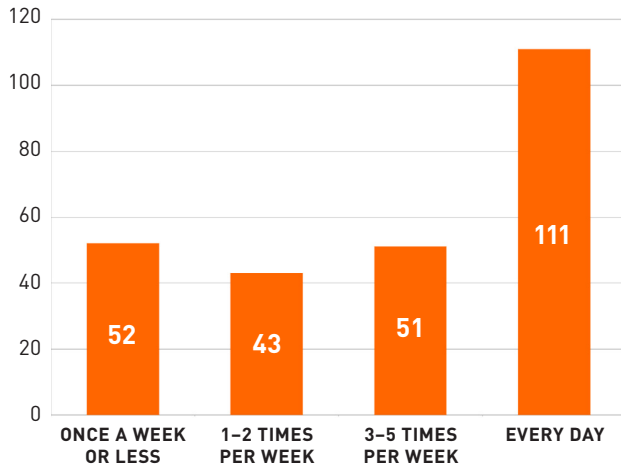
Figure 7. On/Off Island Driving Trips



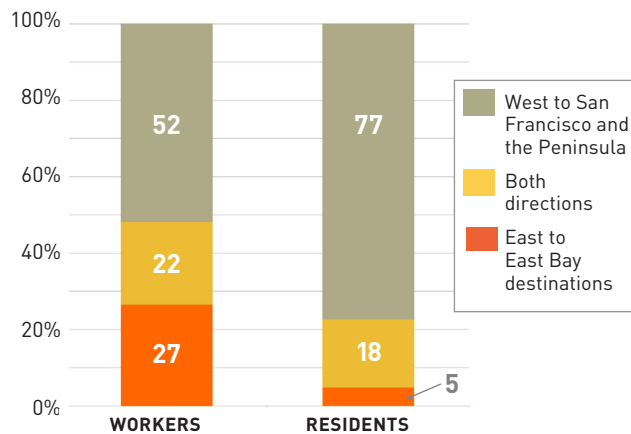
When asked about the direction of travel in order to reach destinations off the island, most respondents—both residents and workers—indicated they most frequently travel West toward San Francisco and the Peninsula. Between both workers and residents, about 20 percent reported traveling both directions equally. However, a higher percentage of workers travel to the East Bay than residents (Figure 8).

Survey respondents reported that congestion, cost of driving (including vehicle ownership and gas), and issues with locating parking were the top areas of concern related to driving on and off Treasure Island, each garnering more than 100 responses in the survey.

**Figure 7. On/Off Island Driving Trips**



**Figure 8. Direction of Travel by Residents and Workers**

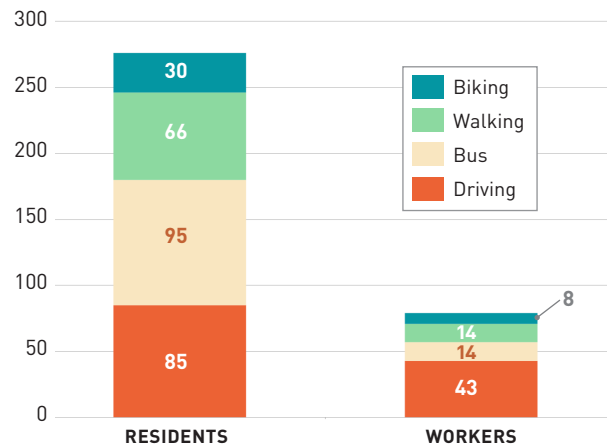


## GETTING AROUND THE ISLAND

Once they arrive on Treasure Island, the majority of workers tend to continue to drive when making other trips within Treasure Island (Figure 9). Because the majority of workers use a vehicle to travel and from Treasure Island, workers’ trip mode on TI may be correlated with vehicle availability.

By comparison, residents (the majority of whom own or have access to a vehicle) use many different modes to travel around TI. On-island travel by residents is more evenly distributed between driving, taking the bus, walking, and biking (Figure 9), with more respondents reporting taking transit to access on-island destinations compared to driving. In addition, 11 percent of residents and 10 percent of workers reported biking. Compared to recent city-wide travel choice surveys, the share of residents who report biking on island may be larger than the share of San Francisco residents who bike: in 2014, SFMTA counted just 4 percent of travel in San Francisco was made using bicycles, taxis, motorcycles, scooter, or carshare (SFMTA Mode Share Survey, 2014).

**Figure 9. On-Island Travel Mode by Residents and Workers**



## TRANSIT USE AND CONCERNS

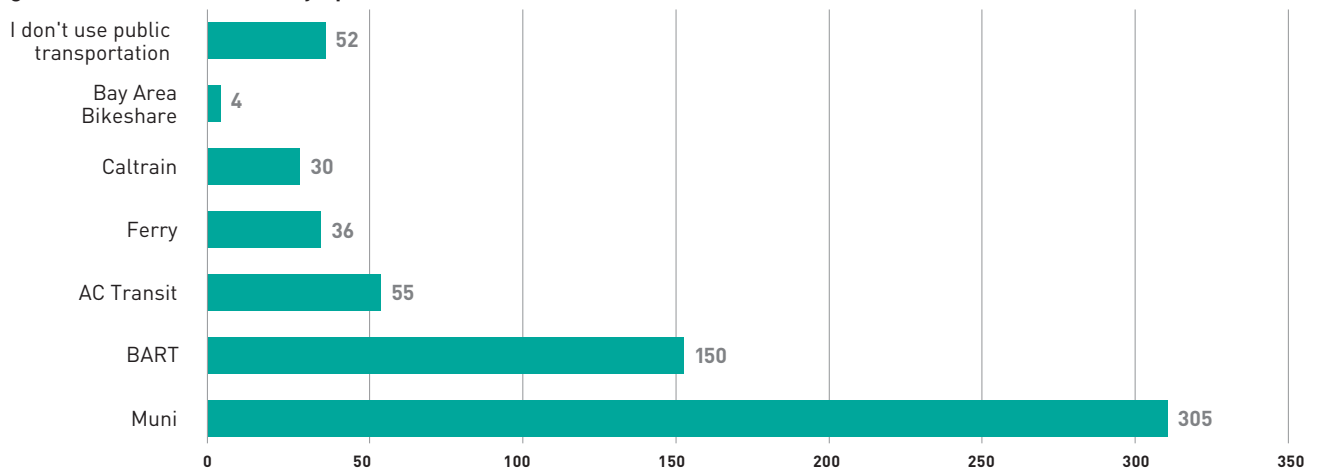
When asked which transit operators they use now for travel on and off Treasure Island, almost all respondents reported using Muni. Interestingly, although BART and AC Transit do not provide direct service to/from Treasure Island, over 200 survey respondents indicated they use one or both of the operators. This means that many TI residents and workers take Muni to San Francisco to transfer to BART or AC Transit or travel from the island by carpool or private vehicle to access BART or AC Transit (Figure 10). Likewise, some respondents indicated that they use Caltrain and take the ferry, two other transit services that do not directly serve Treasure Island. Respondents who indicate that they use any operator beyond Muni may be transit-dependent, willing to make several transfers in order to travel to their destination.

When asked what they liked least about using public transportation, respondents most commonly cited bus crowding, long wait times, and inconsistent wait times

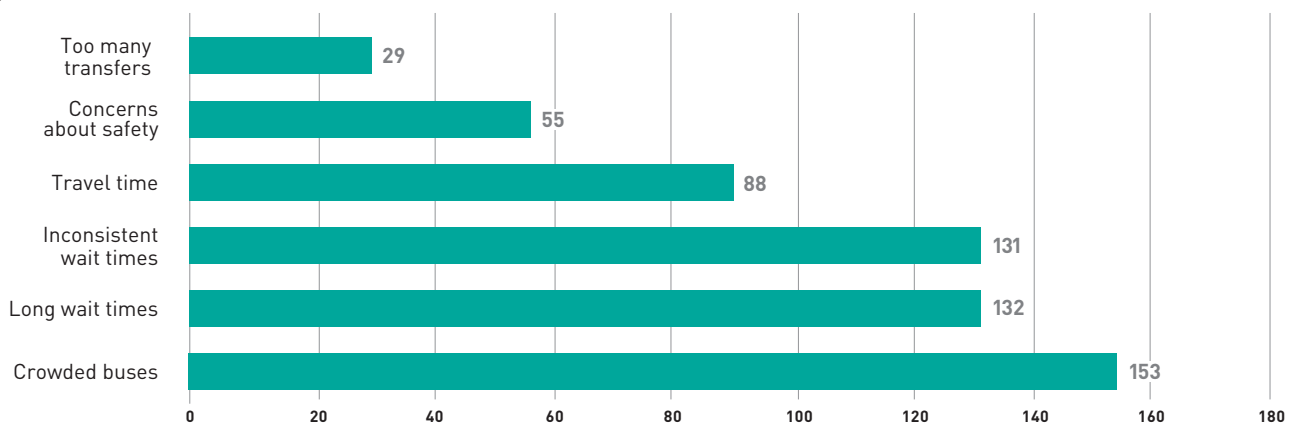
(Figure 11), issues that are likely related. Crowded buses are generally the result of buses experiencing delays (and producing inconsistent wait times). Delays can be common for Muni's 108 route which encounters variable congestion on the Bay Bridge and around the Temporary Transbay Terminal area.

In the open-ended comment portion of the survey, some respondents explained additional transit concerns including inadequate space for bikes on buses, that buses are frequently too crowded to take wheelchairs and passengers do not offer seats for disabled and elderly riders, and that Muni frequency is particularly low at night and on weekends. Some respondents also noted that transfer opportunities from the 108 are lacking, which may be due to the terminus of the 108 in the Temporary Transbay Terminal, which requires an additional transfer to the Muni Metro system or other local buses for destinations in San Francisco outside the SoMa area.

**Figure 10. Public Transit Use by Operator**



**Figure 11. Current Concerns and Issues with Public Transit**



## 4. Key Findings: Technology and Access

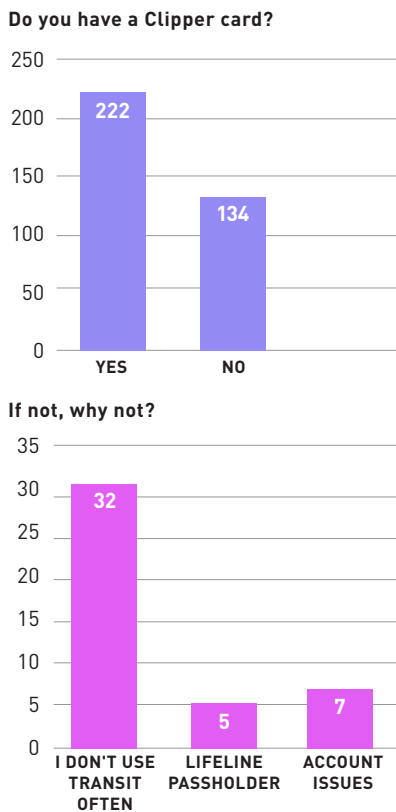
Clipper is a transit card that stores value for most Bay Area transit agencies. Well more than half of respondents in the TI Community Survey reported owning a Clipper card. Of those respondents who did not use Clipper, most indicated they did not use transit often enough to warrant obtaining a Clipper card. However, seven respondents reported account issues had prevented them from getting a card (Figure 12).

FasTrak is an electronic toll collection system that allows drivers to electronically pay tolls on Bay Area bridges and toll roads, including the San Francisco Bay Bridge. More than half of respondents (55 percent) do

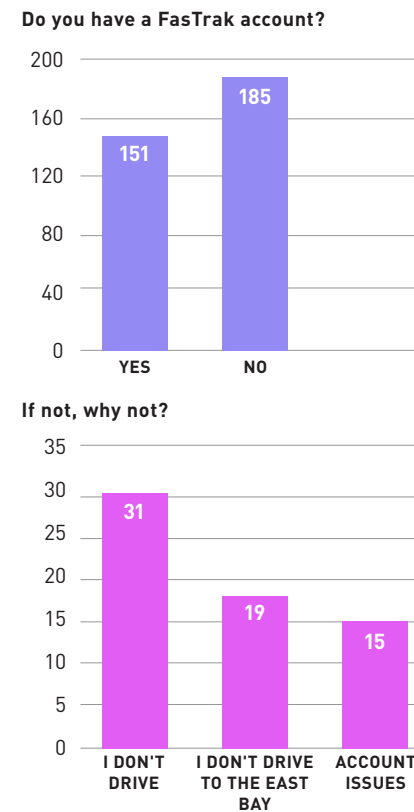
not have a FasTrak account. Of those without a FasTrak account, the most common reasons for not having an account included not driving at all (31 responses), not driving to the East Bay (19 responses) and account issues (15 responses) (Figure 13).

Of respondents who typically take transit to and from Treasure Island, the majority (54 percent) typically buy a Muni FastPass, but many (42 percent) do not buy a discounted monthly pass. A small number of respondents (8 respondents) buy monthly passes from AC Transit (Figure 14).

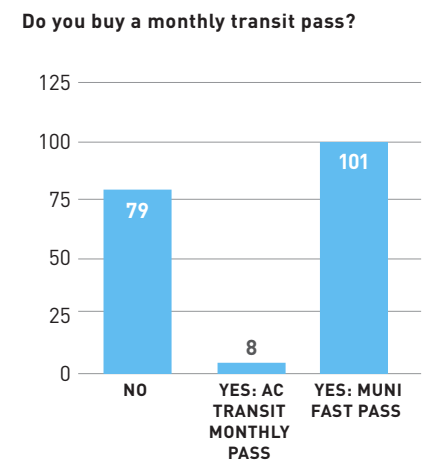
**Figure 12. Clipper Use and Account Issues**



**Figure 13. FasTrak Use and Account Issues**



**Figure 14. Monthly Pass Purchases**





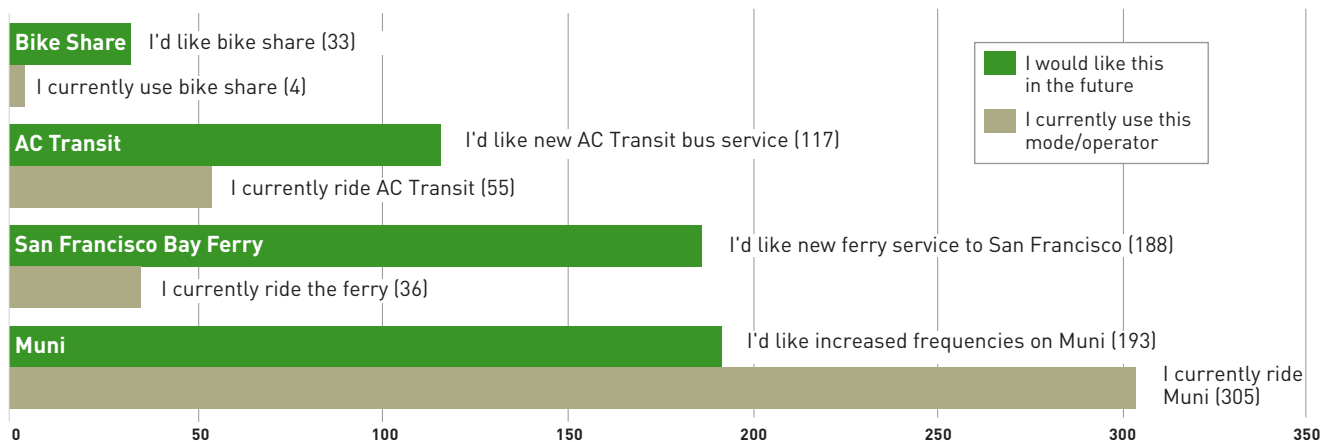
## 5. Key Findings: Future Improvements and Communication

### FUTURE IMPROVEMENTS

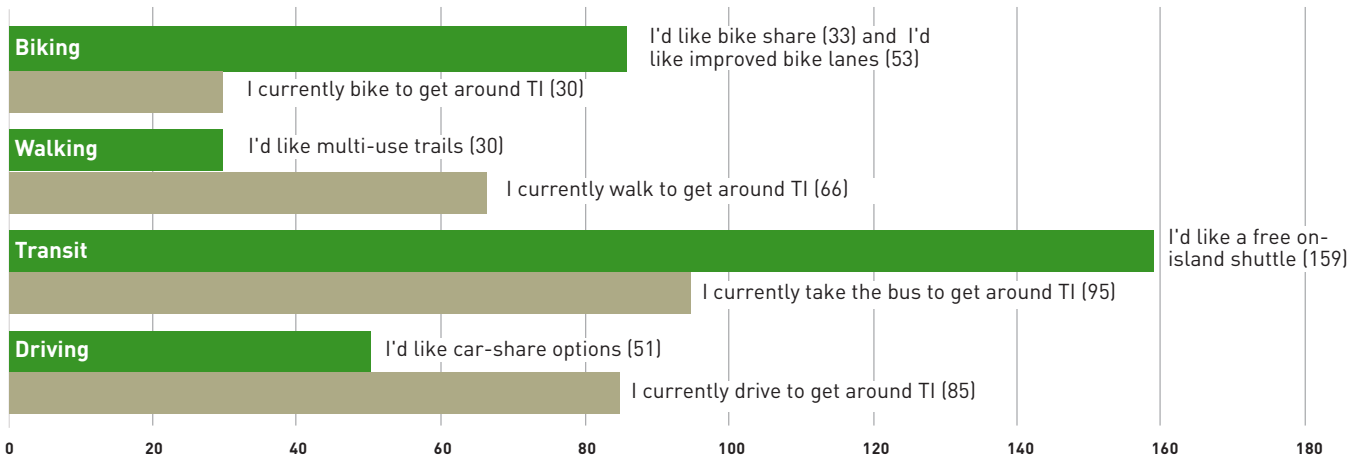
Looking to the future, the TI Community Survey asked respondents about transportation services not currently available on the island that they might want to use in the future. These services included both additional transportation options to and from Treasure Island as well as on-island mobility improvements. The most requested on/off transportation improvement was more frequent Muni service and new ferry service (both with nearly 200 responses each), followed by new AC Transit bus service (117). Preferences for improvements strongly correlated with the modes currently used by survey respondents (Figure 15).

Among on-island transportation improvements, a free on-island shuttle was the most popular potential request (159 respondents). Other potential mobility services such as bike share (33) and car share options (51) were common requests. Infrastructure improvements, such as improved bike lanes (53) and new multi-use recreational trails (30) were also popular (Figure 16). The findings related to biking show a strong latent demand for biking infrastructure, as respondents report wanting bike share and bike infrastructure improvements than the number that currently bicycle.

**Figure 15. Preference for On/Off Transportation Improvements Compared to Current Use**



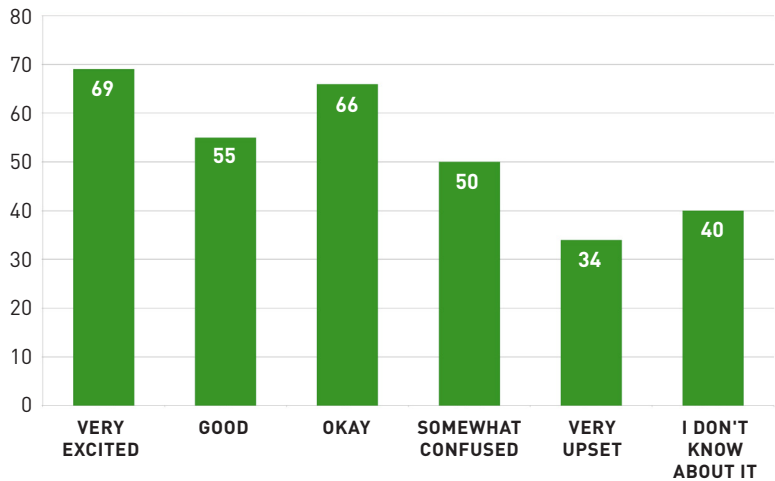
**Figure 16. Preference for On-Island Transportation Improvements Compared to Current Use**



## FUTURE DEVELOPMENT

Survey respondents hold diverse opinions about the planned redevelopment on Treasure Island, ranging from excitement to concern to being unaware of the plans (Figure 17).

**Figure 17. Feelings of Respondents on Treasure Island Development**

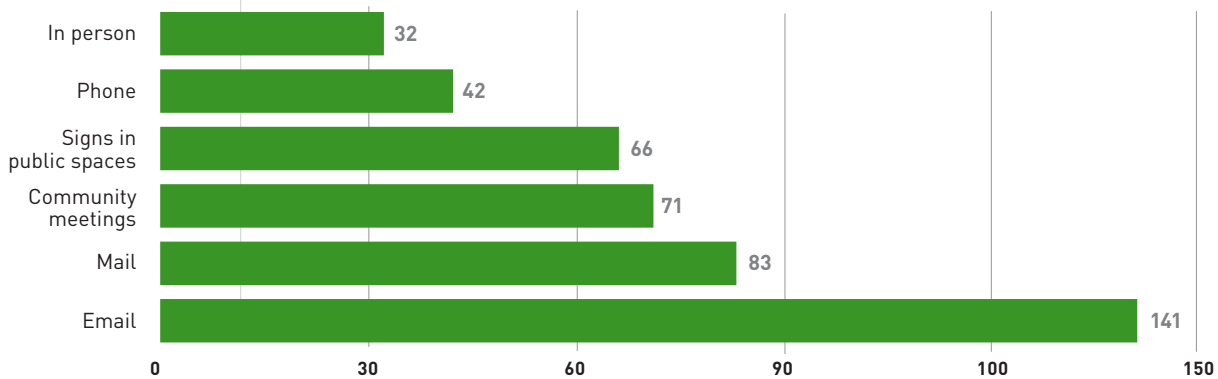


## PREFERRED METHOD OF COMMUNICATION

Nearly a third of survey respondents indicated that email was the best method to keep them updated about transportation improvements. Email was followed by mail, community meetings and signs in public spaces (Figure 18).

As a result of the survey, TIMMA added 132 email addresses to our distribution database. In addition to e-mail correspondence, TIMMA plans to distribute information in public spaces and hold or attend community meetings to communicate with Treasure Island stakeholders throughout the development of the TIMMA program.

**Figure 18. Communication Preferences of Survey Respondents**



## ADDITIONAL COMMENTS

Respondents were also encouraged to leave comments at the end of the survey. From our analysis of these comments, concerns regarding housing and transit affordability, including cost of the ferry and the future toll policy, were common among several respondents. Other

respondents voiced concerns related to school access for children and families. Still others requested continuing efforts to communicate and solicit input from existing residents of TI.

## 6. Summary

Nearly 40 percent of residents who responded to the survey do not own or have access to a vehicle on Treasure Island, indicating a significant transit-dependent population despite the presence of limited public transit options to/from the island. Workers tend to drive on Treasure Island, while travel by residents around the island is more evenly split between driving, walking and using public transportation. Off the island, Muni is the most utilized public transit provider, followed by BART and AC Transit. Those who take public transportation noted issues with crowding on buses, long and unreliable wait times, and a long travel time. There are also safety concerns.

The majority of respondents said they do have a Clipper card but do not have a FasTrak account. Those who do not have access to these technologies cited either not needing them due to lack of transit use or driving, or experiencing issues opening or maintaining their accounts.

When asked which transportation improvements are most appealing, a new ferry service and more frequent Muni service were the most popular. These were followed by a free on-island shuttle and the addition of AC Transit bus service direct to the East Bay. Bike share and additional bike infrastructure were also popular choices for future improvement. More respondents than currently cycle expressed interest in expanding bike share and bike infrastructure on the island. With additional infrastructure investment, some people may begin cycling.

For future communication, respondents preferred to be contacted by email. TIMMA added 132 new subscribers to the project mailing list and will continue other communication modes including flyering in public spaces and holding public meetings in the future.



### PHOTO CREDITS

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## Appendix 1: Full Survey

- 1. Do you live or work on Treasure Island?**
  - a. Yes, I live on Treasure Island
  - b. Yes, I work on Treasure Island
  - c. Yes, I live AND work on Treasure Island
  - d. No, but I like to visit Treasure Island
  - e. Other
- 2. Currently, what is the easiest way for you to get around on Treasure Island?**
  - a. Driving
  - b. Bus
  - c. Walking
  - d. Biking
  - e. Other
- 3. Currently, what is the easiest way for you to get to and from Treasure Island?**
  - a. Driving
  - b. Bus
- 4. In which direction do you most frequently travel from Treasure Island?**
  - a. East: to East Bay destinations
  - b. West: to San Francisco or the Peninsula
  - c. I travel both directions equally
  - d. Other
- 5. Do you own or have access to a car?**
  - a. Yes
  - b. No
- 6. If yes, how often do you commute by car?**
  - a. Everyday
  - b. 3–5 times per week
  - c. 1–2 times per week
  - d. Once a week or less
  - e. I do not own or have access to a car
- 7. What do you like least about driving? (select up to three)**
  - a. Congestion
  - b. Travel time
  - c. Reliability of travel time
  - d. Cost of driving (car, gas)
  - e. Cost of bridge toll
  - f. Looking for parking
  - g. Paying for parking
  - h. Safety concerns
  - i. Other
- 8. What types of public transportation do you use on and off Treasure Island?**
  - a. Muni
  - b. AC Transit
  - c. BART
  - d. Caltrain
  - e. Ferry
  - f. Bay Area Bike Share
  - g. I don't use public transportation
  - h. Other
- 9. If you take public transportation, what do you like least about it? (choose up to two)**
  - a. Travel time
  - b. Inconsistent wait times (unreliable service)
  - c. Long wait times (infrequent service)
  - d. Concerns about personal safety
  - e. Crowded buses
  - f. Too many transfers
  - g. Other

- 10. Do you use FasTrak to pay the bridge toll?**
- a. Yes
  - b. No, because:
- 11. Do you use a Clipper card?**
- a. Yes
  - b. No, because
- 12. Do you generally buy a monthly pass for your preferred mode of public transportation?**
- a. Yes: Muni FastPass
  - b. Yes: AC Transit monthly pass
  - c. No
  - d. Other
- 13. Which of these options would most improve transportation on Treasure Island? (choose up to three)**
- a. New AC Transit bus service to Treasure Island
  - b. Increased frequency of Muni
  - c. New ferry service to San Francisco
  - d. Bike share
  - e. Car share options
  - f. Free island-wide shuttle service
  - g. Multi-use trails
  - h. Bike lanes
  - i. Other
- 14. How do you feel about the new development planned for Treasure Island?**
- a. Very excited
  - b. Good
  - c. Okay
  - d. Somewhat concerned
  - e. Very upset
  - f. I don't know about the new development
  - g. Other
- 15. How would you prefer to be contacted about transportation changes and improvements on Treasure Island? (choose up to three)**
- a. Mail
  - b. Phone
  - c. In person
  - d. Email
  - e. Community meetings
  - f. Signs in public spaces
  - g. Other
- 16. Comments?**
- 17. Optional contact information—please include an email if that is how you prefer to be contacted.**
- a. Name
  - b. Company
  - c. Address
  - d. Address 2
  - e. City/Town
  - f. State/Province
  - g. Zip/Postal Code
  - h. Email address
  - i. Phone number