NYC Ferry – 2021 Survey Results

2021 Survey Overview

2021 Survey Methodology

Distribution method: Online survey emailed to app users who activated a ticket within the last 60 days & advertised onboard with QR code. Generally, between 60-75% of all riders purchase their tickets in the app. Paper ticket users had the option to complete the survey using an on-board QR code, but only if they also owned a smartphone. An estimated 85% of Americans own a smartphone. Respondents were asked to fill out according to their most recent trip; most respondents (99%) responded to the email, meaning QR code respondents and non-app users were under-represented.

Language: Survey was available in English, Spanish, Chinese, Korean, Polish, Russian, and Yiddish. 43 surveys were completed in a language other than English.

Data Collection: Survey was open for 13 days: Saturday, Oct. 2 – Friday, Oct. 15

7 Routes: ER RW SB AST SV GI SG

Responses collected: ~4,100 (average of 215 per route/time period bin), weighted based on actual observed ridership

Purpose: Customer segmentation & demographic information; trip purpose and NYC Ferry usage patterns; COVID-19 recovery

COVID Recovery and NYC Ferry

COVID-19's impacts on NYCF in 2020 were clear. While 0% of the city was vaccinated and many were working from home, survey response rate, ridership, and trip frequency diverted greatly from years prior. In 2021, rising vaccination rates have been followed by the emergence of new variants and continued COVID-19 transmission, delaying COVID recovery at the workplace and continuing to alter travel patterns. Even still, NYC Ferry has had the highest rate of return of any transit option in NYC, with return rate consistently over 80% since September.

Return to Office: The Partnership for New York City's October 2021 employer survey found that 28% of Manhattan office workers are on-site during an average workday. Also, the metropolitan area's unemployment rate has fallen since 2020, signaling a recovering job market in many economic sectors.

School Begins In-Person: NYC Public schools started September 13th without a remote learning option.

Service Area Growth: The St. George Ferry route launched in August 2021, adding 3 landings and expanding service to all 5 boroughs. NYC Ferry's service area is defined as all US Census Tracts within a 0.5 mile radius of a landing.

Survey Weighting

Beginning with the 2019 summer survey, NYC Ferry survey results have been weighted based on actual observed ridership during the survey period. This is done to ensure that totals and percentages are more reflective of actual demographics and ridership, rather than survey response rate.

1. Survey data is collected and prepped for analysis

2. Responses are categorized by both route and time of day. Time period categories are below:

   o AM Peak (Weekdays before 10AM)

   o PM Peak (Weekdays between 4PM & 7PM)

   o Off Peak (Weekdays between 10AM & 4PM, Weekdays after 7PM)

   o Weekend (All times on Saturday/Sunday)

3. Actual ridership during the survey period is separated into the same route/time period buckets as the survey results

4. The weighted value is then found using the following formula for each route/time period bucket:

   o (Total Survey Responses in Bucket)/(Total Observed Ridership in Bucket)

      o This weighted value is used so that when survey responses are summed, they are equal to the actual ridership on that route/time period

Summary of Results

The results of the 2021 survey remained consistent with previous surveys in some ways, but trip purpose and frequency continue to be impacted by COVID-19 and slower than anticipated return to office rates among workers.

Consistent with Previous Results

- Ridership 32% non-white or multiracial

- A majority (79%) of riders walked or biked to and from the ferry landing

- 88% of riders are NYC residents, increasing to 91% in AM and PM Peaks
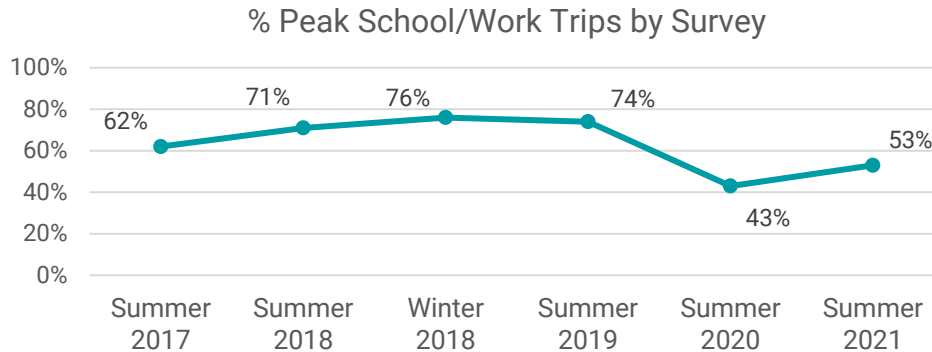
Changes from Previous Surveys

- 53% of peak riders are using the service to commute to work or school, rising since 2020 but still below pre-pandemic levels

- 58% of riders have returned to work in-person at least once a week

- 38% of riders ride the ferry 4 or more times a week, rising since 2020 but still below pre-pandemic levels

- Systemwide Median Income increased to $100,000-$149,999

2021 Survey – Trip Patterns

Trip purpose by route and time period

53% of peak period riders are commuting to work or school. During all time periods, 25% of riders are commuting to work or school.

Time Period	East River	Rockaway	South Brooklyn	Astoria	Soundview	St. George	Systemwide
AM & PM peak weekdays							
Work/School	49%	32%	48%	57%	66%	62%	53%
Non-Work	51%	68%	52%	43%	34%	38%	47%
Off-peak weekdays							
Work/School	21%	7%	19%	19%	24%	30%	19%
Non-Work	79%	93%	81%	81%		70%	81%
Weekends							
Work/School	2%	2%	4%	2%	2%	12%	2%
Non-Work	98%	98%	96%	98%	98%	88%	98%

% Peak School/Work Trips by Survey

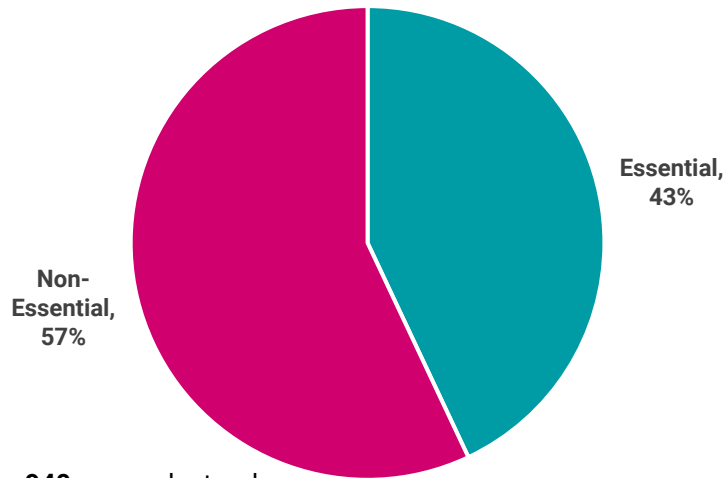| Summer 2017	Summer 2018	Winter 2018	Summer 2019	Summer 2020	Summer 2021
62%	71%	76%	74%	43%	53%

This is **lower** than NYCF surveys pre-COVID, but higher than the Summer 2020 survey, indicating that while COVID's impact on commuting patterns lingers, riders are returning to work and school in-person.

Essential Work and Return to Office

24% of riders used NYCF to commute to the office/worksite. Of these riders, 43% identified as essential workers. Essential commuters accounted for 10% of total ridership.
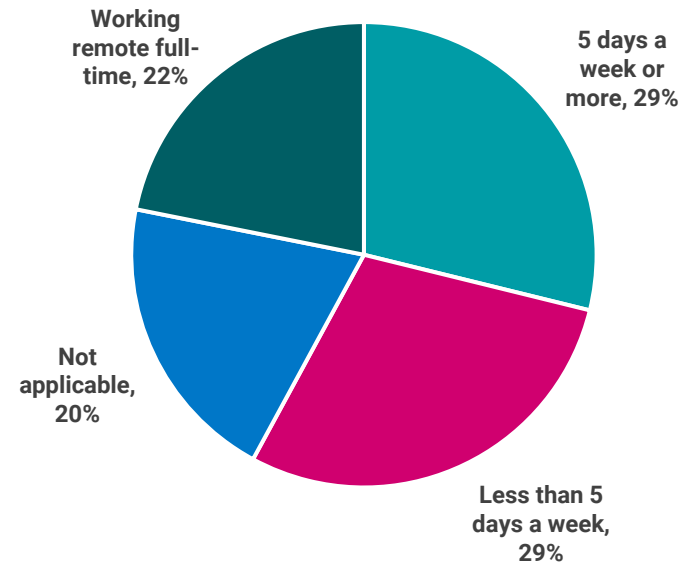
58% of riders indicated they have returned to the office/worksite at least once a week.

% of Riders Traveling to Work by Definition of Work

Essential, 43%

Non-Essential, 57%

There were **940** respondents who indicated they used their most recent ferry trip to get to/from work
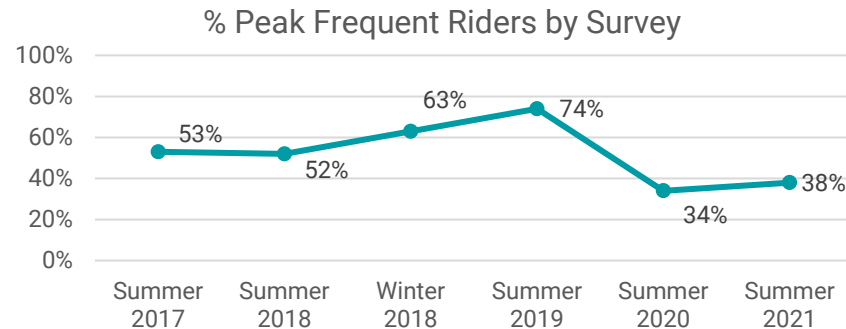
% All Riders Returning to the Office

Working remote full-time, 22%

5 days a week or more, 29%

Not applicable, 20%

Less than 5 days a week, 29%

This is the first time these questions were asked

Trip frequency

38% of peak riders use the ferry on a regular basis.

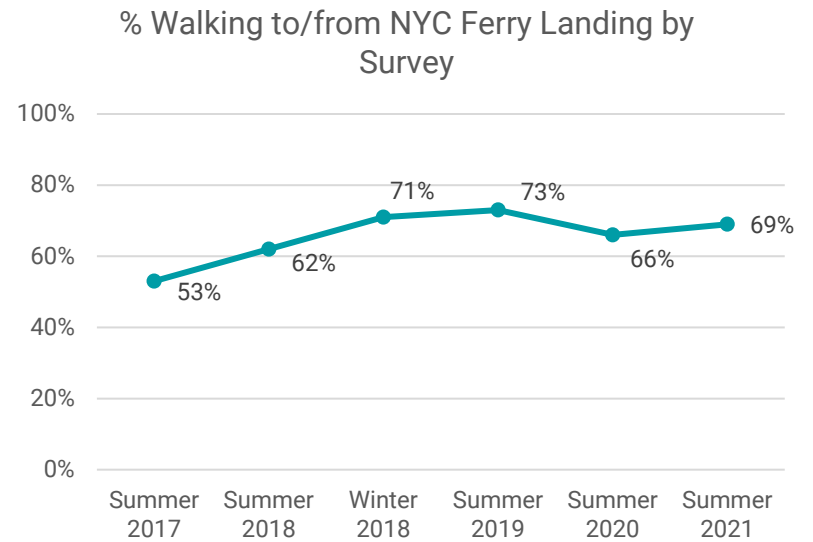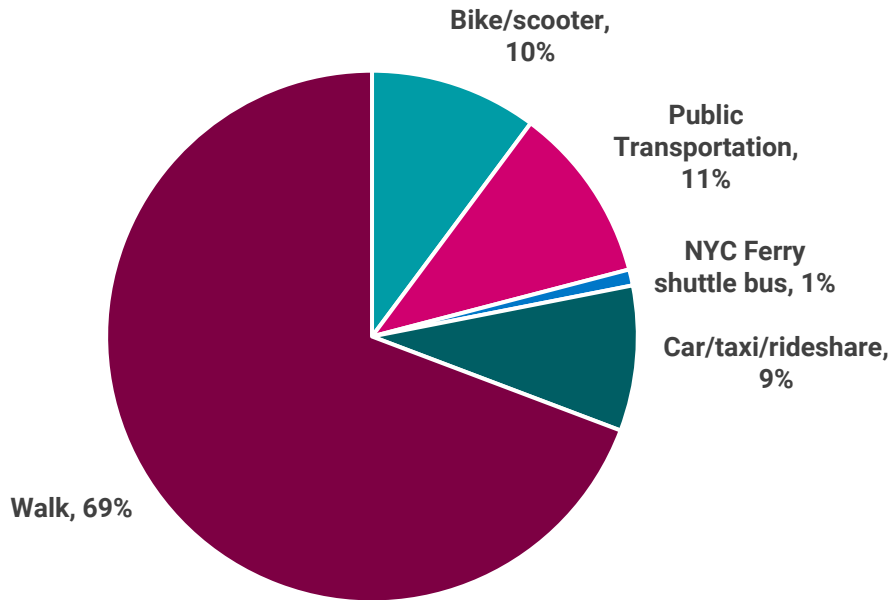| Trip Frequency	East River	Rockaway	South Brooklyn	Astoria	Soundview	St. George	Systemwide
Peak							
Frequent (4+ trips per week)	35%	28%	34%	40%	52%	29%	38%
Infrequent (2-3 trips per week)	18%	17%	17%	21%	12%	27%	18%
First time or seldom	46%	54%	49%	39%	36%	44%	44%
Off-Peak							
Frequent (4+ trips per week)	18%	15%	20%	23%	12%	18%	18%
Infrequent (2-3 trips per week)	19%	14%	17%	20%	23%	18%	19%
First time or seldom	63%	71%	63%	57%	65%	64%	63%
Weekend							
Frequent (4+ trips per week)	9%	9%	11%	8%	11%	12%	9%
Infrequent (2-3 trips per week)	15%	13%	13%	16%	10%	10%	14%
First time or seldom	76%	78%	76%	76%	79%	78%	77%

% Peak Frequent Riders by Survey

	Summer 2017	Summer 2018	Winter 2018	Summer 2019	Summer 2020	Summer 2021
	53%	52%	63%	74%	34%	38%

Peak rider frequency was **lower** than pre-pandemic, indicative of changes in travel behavior and work-from-home trends during the pandemic, as well as subsequent recovery.

Mode to/from landings

69% of riders walk to or from the ferry. 11% use other public transportation services. 9% use an automobile to access the landings. Rockaway, St. George, and Soundview account for most drivers. Public transit use is highest at East 34th Street and Wall Street/Pier 11.
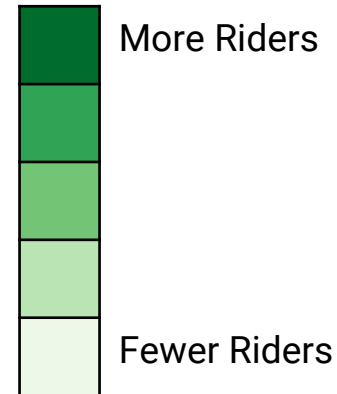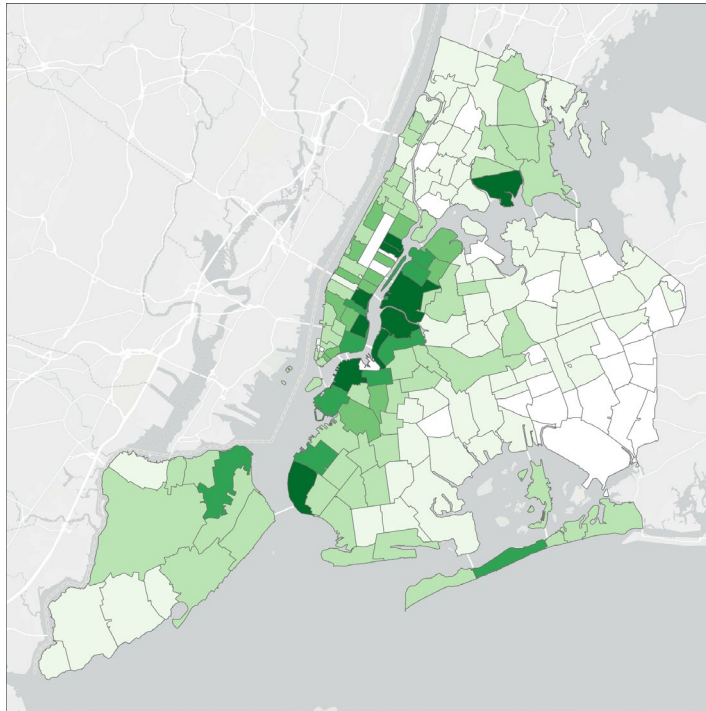

Pie chart labels: Bike/scooter, 10%; Public Transportation, 11%; NYC Ferry shuttle bus, 1%; Car/taxi/rideshare, 9%; Walk, 69%

% Walking to/from NYC Ferry Landing by Survey

Summer 2017: 53%; Summer 2018: 62%; Winter 2018: 71%; Summer 2019: 73%; Summer 2020: 66%; Summer 2021: 69%

The share of MTA bus/subway and car/taxi/rideshare access is **up** from previous surveys. Bike/scooter access is down.

2021 Survey – Demographic Data

All routes – home ZIP codes

88% of riders reside within New York City. 91% of peak riders live in New York. This year, more Staten Islanders completed the survey due to the St. George route launch.

More Riders

Fewer Riders

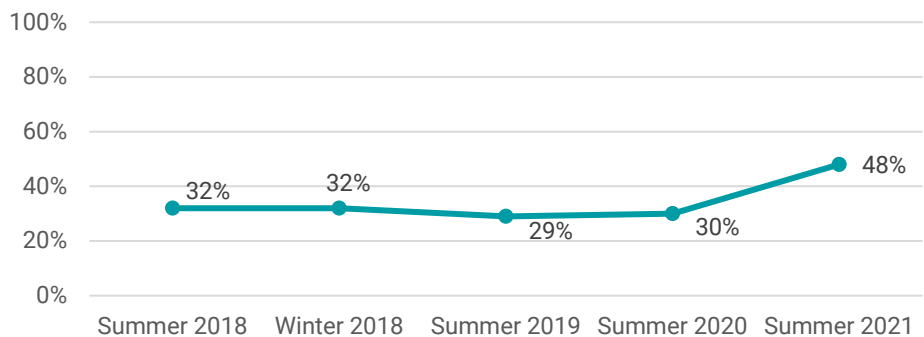There were **3,931** respondents with valid ZIP codes entered.

The percentage of riders who live in New York is **lower** than in 2020 (95% of ridership), but reflective of the rise in tourism as travel restrictions have been lifted and vaccination rates rise during this recovery period.

Age

The percentage of riders over 45 years-of-age has increased since 2020.

Age	East River	Rockaway	South Brooklyn	Astoria	Soundview	St. George	Systemwide
18-24	4%	3%	4%	2%	2%	5%	3%
25-35	30%	19%	23%	26%	15%	23%	25%
36-45	24%	19%	25%	24%	20%	18%	23%
46-55	18%	19%	22%	20%	26%	23%	20%
56-65	13%	22%	17%	16%	23%	21%	17%
66+	11%	17%	9%	11%	14%	10%	11%

% Riders Over 45 by Survey

Summer 2018: 32%
Winter 2018: 32%
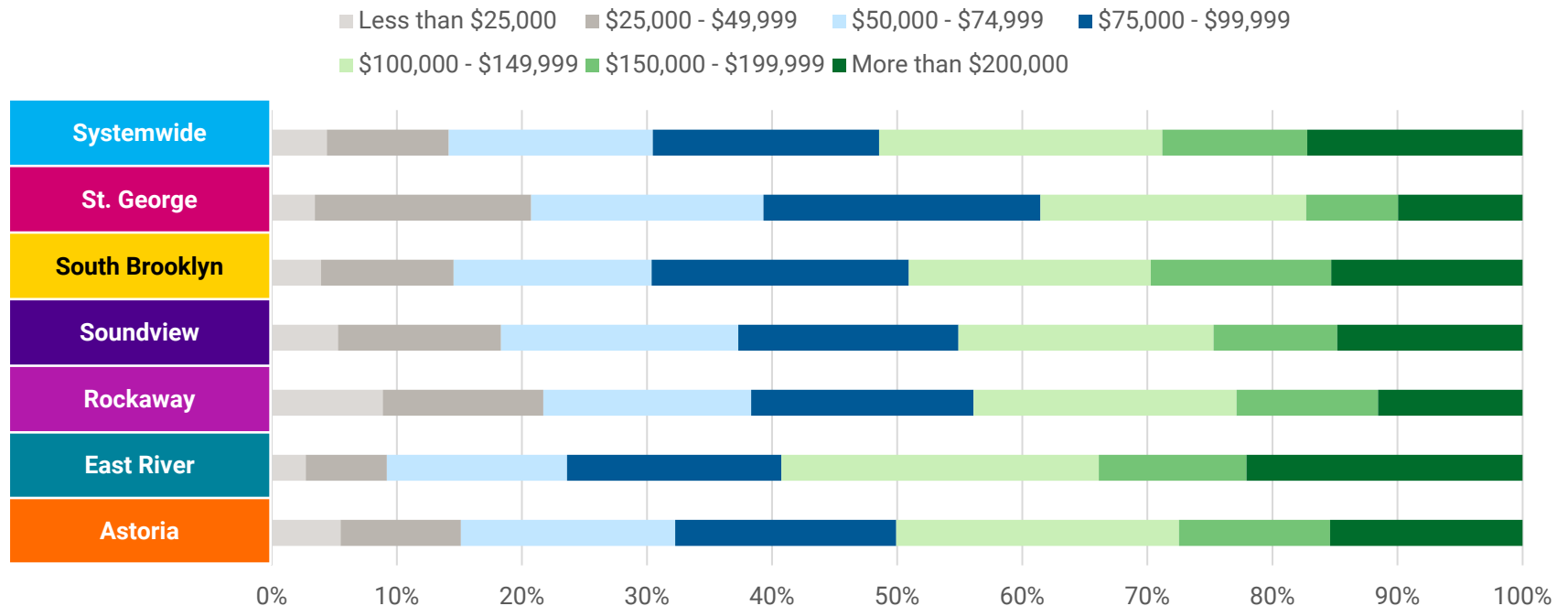Summer 2019: 29%
Summer 2020: 30%
Summer 2021: 48%

While other surveys saw a consistent response to question of age, this year's survey had the highest rate of response for riders identifying as over 45 than any previous survey

N = 4067
No response = 28

Income

The systemwide median income is $100,00-149,999, an increase from 2019 and 2020 but in line with 2017 and 2018. East River route, NYC Ferry's highest ridership route, had the highest percentage of riders with incomes greater than $100,000. 4 out of 6 routes had median incomes of $75,000-$99,999. Per the US Census Bureau, the East River service area has an annual median Income of $118,072. The median household income for all routes is $95,171.

Legend:
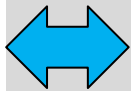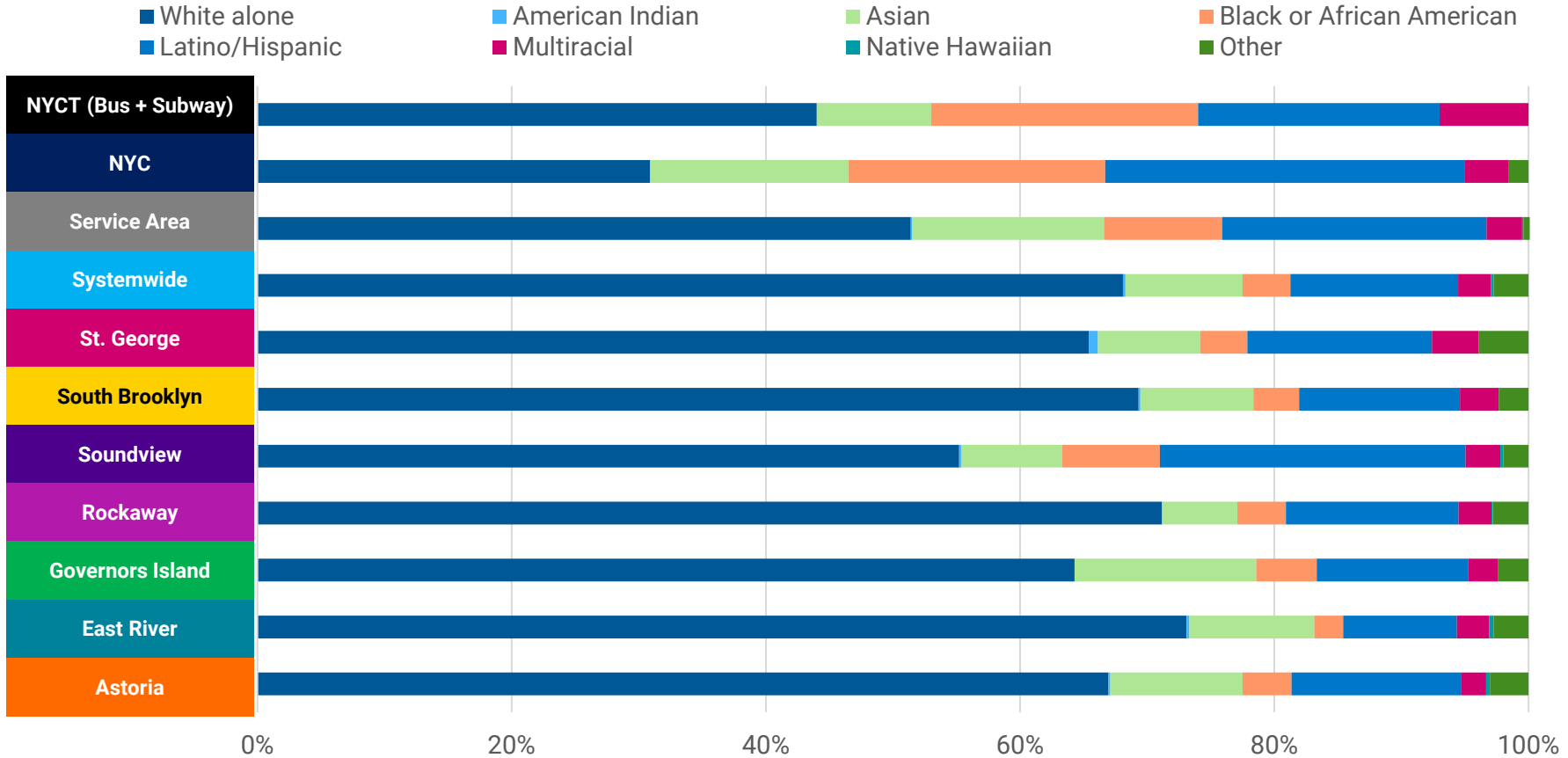- Less than $25,000
- $25,000 - $49,999
- $50,000 - $74,999
- $75,000 - $99,999
- $100,000 - $149,999
- $150,000 - $199,999
- More than $200,000

Routes (top to bottom): Systemwide, St. George, South Brooklyn, Soundview, Rockaway, East River, Astoria

X-axis: 0% to 100%

The annual income has **increased** since 2019 and 2020.

N = 3148
No response/prefer not to answer = 947

NYC /EDC

NYC Ferry 2021 - Survey Results

Race/ethnicity by route

System-wide, 32% of riders described themselves as non-white or multiracial.

Legend:
- White alone
- American Indian
- Asian
- Black or African American
- Latino/Hispanic
- Multiracial
- Native Hawaiian
- Other

Chart categories (top to bottom):
- NYCT (Bus + Subway)
- NYC
- Service Area
- Systemwide
- St. George
- South Brooklyn
- Soundview
- Rockaway
- Governors Island
- East River
- Astoria

X-axis: 0% 20% 40% 60% 80% 100%

This is **in line** with previous surveys for the system.

N = 3734
No response/prefer not to answer = 361

Appendix A − Survey Questions

Appendix A – Survey Questions

1. **When was your most recent trip?**
   - Within the last week
   - Within the last month
   - Within the last three months
   - More than three months ago

2. **When was your most recent trip?**
   - Within the last week
   - Within the last month
   - Within the last three months
   - More than three months ago

3. **What time of day was your most recent trip?**
   - Weekday - Before 10 AM
   - Weekday - Between 10 AM and 4 PM
   - Weekday - Between 4 PM and 7 PM
   - Weekday - After 7 PM
   - Weekend

4. **On your most recent trip, which route(s) did you use?**
   - East River
   - Rockaway
   - Astoria
   - Soundview
   - South Brooklyn
   - Governors Island
   - St. George

5. **During your most recent trip, where did you get ON the ferry?**
   - Atlantic Ave / BBP Pier 6
   - Astoria
   - Battery Park City/Vesey St.
   - Bay Ridge
   - Brooklyn Navy Yard
   - Corlears Hook
   - DUMBO / Fulton Ferry
   - East 34th St
   - East 90th St
   - Greenpoint
   - Governors Island
   - Hunter's Point South
   - Long Island City
   - Midtown West/W 39th St-Pier 79
   - North Williamsburg
   - Red Hook
   - Rockaway
   - Roosevelt Island
   - Soundview
   - South Williamsburg
   - St. George
   - Stuyvesant Cove
   - Sunset Park / BAT
   - Wall St / Pier 11

Appendix A – Survey Questions

6. **During your most recent trip, where did you get ON the ferry?**

- Atlantic Ave / BBP Pier 6
- Astoria
- Battery Park City/Vesey St.
- Bay Ridge
- Brooklyn Navy Yard
- Corlears Hook
- DUMBO / Fulton Ferry
- East 34th St
- East 90th St
- Greenpoint
- Governors Island
- Hunter's Point South
- Long Island City
- Midtown West/W 39th St-Pier 79
- North Williamsburg
- Red Hook
- Rockaway
- Roosevelt Island
- Soundview
- South Williamsburg
- St. George
- Stuyvesant Cove
- Sunset Park / BAT
- Wall St / Pier 11

7. **What was your primary mode to get to and from the ferry on this most recent trip?**

	To ferry	From ferry
Walk	☐	☐
Subway	☐	☐
MTA bus	☐	☐
Bike (personal)	☐	☐
Citi Bike	☐	☐
Drive & park	☐	☐
Taxi / Uber / Lyft / Via	☐	☐
Dropped off by friend / family car	☐	☐
Access-A-Ride	☐	☐
Scooter and/or other micro-mobility option	☐	☐
Ferry shuttle bus	☐	☐

7. **Which NYC Ferry Shuttle bus route did you use? (Only for those who marked "Ferry shuttle bus")**

- Midtown East Shuttle Bus
- Rockaway West Shuttle Bus
- Rockaway East Shuttle Bus
- NY Waterway – Pier 79 Shuttle Bus

8. **Over the past year, how often did you ride NYC Ferry?** *(count each direction as 1 trip)*

- 11 or more times a week
- 4 – 10 times a week
- 2 – 3 times a week
- Once a week or less
- This was my first trip

Appendix A – Survey Questions

9. **Why do you ride NYC Ferry? (Check all that apply)**
- It is faster than other transportation options to get to my desired destinations
- It is cost effective
- Its open-air option makes me feel at a lower risk of exposure to COVID-19 than other public transportation options
- It is the public transportation option closest to my home/work/school
- It is more comfortable than other public transportation options
- Other: _____

10. **Would you define your occupation as essential per the definition provided by NYS Executive Order 202.8*?**
- Yes
- No

11. **How often are you on site/in office for your occupation?**
- 5 days a week or more
- Less than 5 days a week
- Working remote full-time
- Not applicable

12. **What is your home ZIP code?**

13. **What is your age?**
- <18 years old
- 18-24
- 25-35
- 36-45
- 46-55
- 56-65
- 66+

14. **With which gender do you most identify?**
- Male
- Female
- Non-binary/third gender
- Prefer to self-describe: _____
- Prefer not to answer

15. **Are you of Hispanic or Latino origin?**
- Yes
- No
- Prefer not to answer

16. **How would you describe yourself? (check all that apply)**
- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White
- Other
- Prefer Not to answer
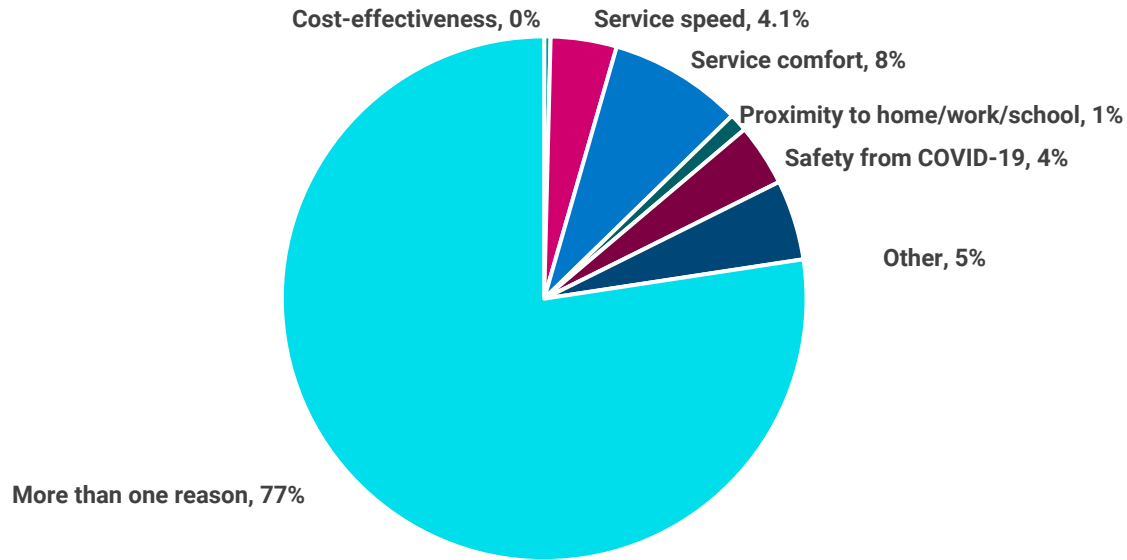
Appendix A – Survey Questions

17. **What is your estimated total annual income?**
- o Less than $25,000
- o $25,000 - $49,999
- o $50,000 - $74,999
- o $75,000 - $99,999
- o $100,000 - $149,999
- o $150,000 - $199,999
- o More than $200,000
- o Prefer not to answer

18. **Do you speak a language other than English at home?**
- o Yes
  - o What is that language? _____
- o No
- o Prefer not to answer

19. **How well do you speak English?**
- o Very well
- o Well
- o Not well
- o Not at all
- o Prefer not to answer

20. **Do you have any comments for NYC Ferry?**

Appendix B – Other Results

Riding NYC Ferry

77% of riders selected multiple reasons for riding the ferry. This question was not included in the general responses because upon further evaluation, the decision to allow riders to choose unlimited options instead of asking them to rank options or limiting selections did not allow for precise analysis or definite conclusions about our ridership.

Why do you ride NYC Ferry?

Cost-effectiveness, 0%   Service speed, 4.1%

Service comfort, 8%

Proximity to home/work/school, 1%

Safety from COVID-19, 4%

Other, 5%

More than one reason, 77%

This is the first time this kind of question has been asked.