



Mission Bay TMA



2017 Annual Report

April 2018



Mission Bay
Transportation Management Association

410 China Basin Street | San Francisco, CA 94158 | www.MissionBayTMA.org

Executive Summary

Mission Bay is will be largely completed by the end of 2019. As of December 2017, all residential units originally entitled are completed and occupied. Over a third of those units are affordable housing which prioritizes seniors living on fixed incomes, formerly homeless, and low-income families with children. Mission Bay's residential population now tops 14,000.

The Mission Bay project area is also entitled for 4.6 million square feet of commercial office and retail space. Approximately 2 million square feet is completed and occupied and the remainder is under construction.

One 600,000 SF commercial property, The Exchange, will open in mid-2018.

The 18,000 seat Chase Event Center started construction in 2017 and is on a fast track to open by Fall, 2019. A 200+ room hotel, and the remaining commercial properties (UCSF on Illinois Street, Uber headquarters on Third Street, and the Chase Center office towers) all have similar 18-to-24-month construction schedules.

Over 15,000 people now work in Mission Bay. Approximately one third work in commercial buildings which are associated with the Mission Bay TMA and are located along Mission Bay Boulevard, Terry Francois Boulevard, Illinois Street and Owens Street. Two-thirds of workers at Mission Bay are employed by UCSF. Mission Bay's diverse employment base includes everything from high tech office to medical research and corporate headquarters to non-profit organizations and government offices. The neighborhood's growing 'ground floor retail', restaurants, and the new hotel will also bring hundreds of low income service workers to the community.

The Mission Bay Conference Center at UCSF brings an average of 200 visitors to the area each day. The two hospitals bring hundreds more.

Lengthening travel times along the Mission Bay shuttle routes resulting from construction, special events and other variables as well as customer requests for more direct service, prompted a survey in September, 2017 to solicit feedback about which BART station Mission Bay riders prefer. Civic Center BART was preferred by a slight majority of the 540 people who responded to the survey.

Survey respondents were dispersed fairly evenly among Mission Bay residents (21%); and those working on the East, West, or South side of Mission Bay.

These survey results led to the decision to relocate the hub to Civic Center in early 2018.

ON THE COVER: White zones at transit hubs are frequently occupied by non-attended, parked personal and commercial vehicles who do not abide by the 'passenger loading only' signage. Enforcement, especially in peak commute hours, is also absent. There are no approved Shuttle Zones at either Powell Street BART or the Temporary Transbay Terminal.

Mission Bay TMA

The purpose of the Mission Bay TMA is to develop, deliver and manage travel demand, through multiple strategies aimed at discouraging single-occupant vehicle (SOV) trips and reducing vehicle miles travelled (VMT). The charter and core services are prescribed by the Master Development Agreement with the City and County of San Francisco.

Residential and commercial properties built within the geographic boundaries of the Mission Bay Redevelopment Area are required to participate in the Mission Bay TMA. City and State entities can exempt themselves from the requirement.

The Mission Bay TMA programs and services not only serve the residents and employees in these Mission Bay TMA member properties, they are also open and free to all: employees and residents of UCSF, employees and visitors to the City's Public Safety building, and residents and workers in adjacent properties. These groups comprise over 30% of the shuttle's ridership.

UCSF's acquisition of parcels within the MBTMA's boundaries will result in a loss of 500,000 square feet in dues available for TDM annually to the TMA because of this exemption, despite increasing demand for service.

TDM Measures Required at Mission Bay

The Mission Bay TMA strives to fulfill its primary goal of reducing Single Occupancy Vehicular (SOV) travel to, from and within Mission Bay at peak commute periods through Transportation Demand Management (TDM) strategies as described in the City-mandated 1999 Mission Bay Transportation Systems Management Plans (TSM) for North and South Mission Bay. Signatories to these Plans were the City and County of San Francisco, the San Francisco Redevelopment Agency, and the Master Developer of Mission Bay.

The strategies called for in these agreements were:

1. Develop services, facilities, incentives and policies that make public transit the preferred means of access to Mission Bay
2. Coordinate the development and delivery of TSM activities among property owners and tenants in Mission Bay
3. Promote, encourage and facilitate the use of ridesharing, bicycling and walking
4. Manage the supply and demand of commercial parking to provide sufficient capacity primarily for business visitors and persons traveling in high occupancy vehicles
5. Ensure that activities are coordinated with other transportation interests in and around Mission Bay as well as with existing activities in the Greater Downtown Area

6. Allow flexibility in determining the most cost effective methods to achieve TSM goals and objectives since the Plan Area and its supporting infrastructure will be built out over a long period and will involve a broad range of uses and different levels of service demand

Specific TDM measures as identified in the Mission Bay TSM Plans include:

Shuttle Services

“Develop, operate and/or manage a shuttle service...that provides commuters with access to regional transit services including but not limited to the Caltrain (at its terminal at Fourth and King), Transbay Terminal, MUNI Metro service and MUNI light rail (existing and proposed). The primary intent of the shuttle is to bridge gaps in the public transit service as the project area develops...Furthermore, the program should be established with the intent to maximize interface with any existing or planned shuttles in the vicinity. Shuttle operations may be modified to achieve benefits from consolidating operations of several shuttle services.”

The TSM Plans also noted that the proposed Mission Bay Shuttle service *“could also serve specific gathering points in major San Francisco residential neighborhoods. This service would eliminate employees’ need to pay additional fares when transferring from a regional transit system to a local transit system and provide a more comfortable and direct means of reaching their respective workplaces. Muni service between these areas will undoubtedly improve in future years, but shuttle buses could serve to lessen the impact on Muni service during the interim...”*

The Plans contemplated a possible reduction in shuttle services as SFMTA transit improvement projects to the area come online.

Guaranteed Ride Home

“Offer Guaranteed Return Trip at no cost if an emergency requires earlier or later departure.”

Transit Pass Sales

“Review the feasibility of providing transit fare discounts using transit vouchers provided by transit agencies as well as functioning as a broker to Mission Bay residents for transit tickets or passes, and work with transit agencies to provide employees working in Mission Bay with convenient access to buying fare media at or near their work sites.”

Employee Subsidies

“Work with transit agencies to provide employees working in Mission Bay with the opportunity to purchase discounted fares through transit vouchers as a financial incentive for avoiding SOV travel.”

Bicycle Parking

“Make recommendations for bicycle parking in Mission Bay common areas that is both accessible and efficient.”

Transit, pedestrian and bicycle route information

“Disseminate transit, pedestrian and bicycle route information.”

Parking management

“Support parking management for commercial uses that, among other things, discourages SOV parking and encourages use of carpools and shared parking in lots serving mixed land uses.”

Flexible work time/telecommuting

“Provide tenants with information to assist in exploring and developing alternative work schedules including telecommuting. Provide owners and tenants with information regarding peak travel periods to help in developing alternate work schedules.”

Ferry service

“Collaborate with the Port and others in ongoing studies of the feasibility of expanding regional ferry services and providing efficient access to/from Mission Bay.”

Monitoring and reporting

“Conduct an annual survey of employee commute patterns among tenants in Mission Bay. Produce and submit an Annual Report.”

The Effectiveness of the TDM Program at Mission Bay

The drive-alone rate in Mission Bay is among the lowest of any district in San Francisco. For the five year period from 2011-2016, the drive-alone rate has averaged just over 20%. Mode-share was not asked in our annual survey in 2017; instead this survey focused on transit hubs.

The community chooses alternative modes for a variety of reasons.

Employees and residents have a spectrum of public and private transportation options to choose from.

Public transit services have improved in the past couple of years, with Line 55 bus service on 16th Street augmenting the Muni Light Rail service.

Mission Bay Shuttle links BART and the Transbay Terminal with Mission Bay.

The Caltrain station at 4th & King sits at the northern border of Mission Bay and is within a 10 minute walk for many in Mission Bay, in addition to being served by the Shuttle.

Mission Bay also has a robust biking and walking community. Those who are able find it faster to walk or bike to many destinations than either drive or use vehicular transportation services. Lastly, Uber and Lyft have become popular alternatives.

Scoop and Waze carpooling also both launched in San Francisco in 2017. Scoop began marketing to the UCSF Mission Bay community in late 2017.

TDM Strategies

Mission Bay Shuttle

The Mission Bay Shuttle system is an integral part of the Mission Bay neighborhood's transportation network and both enables and encourages many other TDM activities. **Boardings for 2017 averaged just under 1,300 per weekday.**

The Mission Bay Shuttle system and routes were designed specifically to achieve the City's directive to provide commuter service between regional transit hubs and Mission Bay, linkages with other shuttle and transit services, as well as to consolidate service with others when feasible.

The Mission Bay Shuttle has operated from the Powell Street Station (BART and Muni Metro transit hub), the Caltrain Depot at Fourth & King, and local destinations within the Mission Bay neighborhood since it began in 2010. The Shuttle also provided service to employees at Ancestry.com offices in 2017, consolidating duplicative shuttle service in the area. It provided service to China Basin Landing from 2014 through early 2017; China Basin has since discontinued its shuttle participation. In mid-2017, the Mission Bay Shuttle began providing service to a tenant at 303 Second Street on its TransBay route, linking that property with the Caltrain station. Service to TransBay was able to increase from hourly to 30-minute frequencies with this additional revenue.

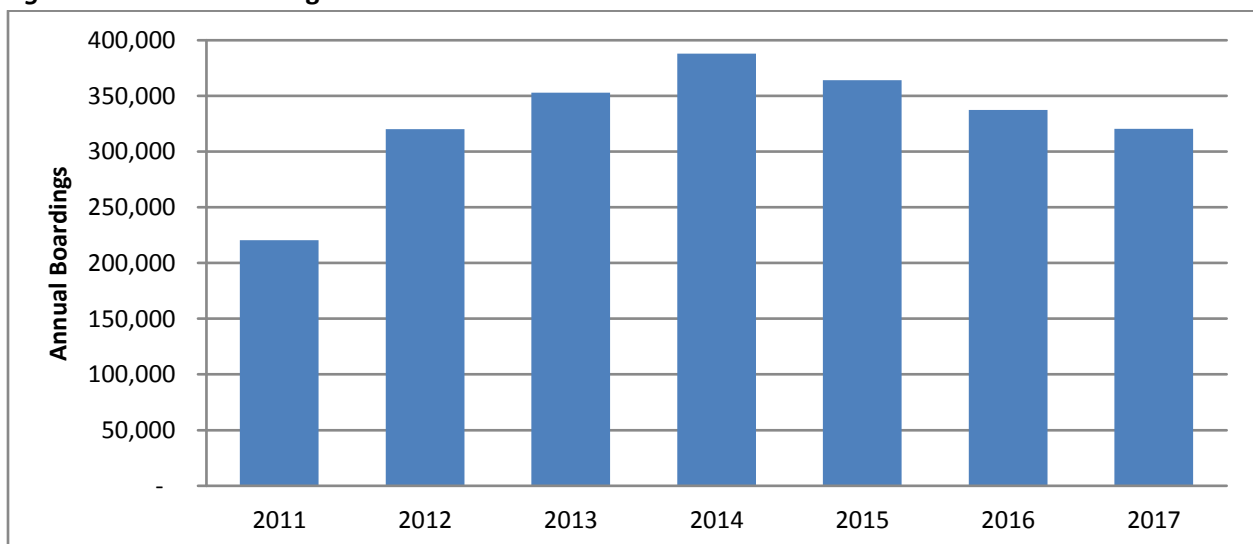
By expanding beyond the boundaries of the Mission Bay TMA properties, the total number of commuter shuttles operating between SOMA and downtown San Francisco has been reduced. Increased levels of service for all participants at a more affordable cost also makes shared services mutually beneficial.

Despite these partnerships, shuttle ridership continued a downward trend first apparent in late 2015-2016. The decline reflects both a local and national trend of declining use of public transit over the past three years. Nationally, public transit use is down over 11% since 2015. Locally, shuttle ridership has declined significantly on several private systems serving SOMA properties including China Basin and Showplace Square.

The causes for declining ridership are complex and wide-ranging. Some of the reasons Mission Bay Shuttle riders no longer use the shuttle include:

1. Increasingly, riders don't feel safe in Downtown stations with growing homeless and other populations. This impacts early morning service (6am to 7:30am) and service at dusk/evening, in particular but is also impacting peak hour utilization.
2. Suburban riders are finding it hard to park at a BART station near their home (a first mile problem).
3. Overcrowded BART cars and service delays have also contributed to some riders finding other alternatives.
4. Increased travel times due to increasing traffic and construction detours both within Mission Bay and on all routes to transit hubs negatively impact the Mission Bay Shuttle's reliability and overall travel times for our riders. This makes using the shuttle and public transit less competitive than other modes.
5. More people who work in Mission Bay are moving out of San Francisco and into areas where using public transit may be inconvenient (total travel time, lack of first mile services, etc.).
6. More public transit riders regularly use TNC services as part of their commute mix, either with fellow employees when the Shuttle is late, or as single occupants.
7. A growing number of employees now work remotely, so they may not be coming into their offices at Mission Bay on a daily basis.
8. The number of visitors (and local traffic) to Mission Bay has increased significantly with the opening of UCSF hospitals.

Figure 2: Annual Boardings



Guaranteed Ride Home

The Mission Bay TMA enrolls every Mission Bay employer in the Countywide Guaranteed Ride Home program.

Transit Pass Sales and Employee Subsidies

The Mission Bay TMA subsidizes the first/last mile of employees' and residents' commutes by providing fare-free shuttle service. The cost-per-passenger-trip for shuttle services averaged \$3.44 in 2017; an increase of \$1 over 2016.

Several Mission Bay employers also subsidize public transit monthly passes for their employees, either fully or partially.

Bicycle Parking

As the new Mission Bay street network expands, new sidewalk bicycle racks have been installed at intersections, parks and high-visibility locations (e.g. near entrances to buildings, lobbies, café/retail). These new public bicycle racks are maintained by the non-profit Mission Bay Maintenance Association and have been installed throughout the neighborhood in accordance with the guidelines set forth in the Mission Bay Streetscape Master Plan.

Commercial and residential property owners have increased the availability of secure bicycle parking at their respective buildings by adding or expanding their indoor bike parking facilities. New commercial office projects are exceeding the minimum bike parking requirements by providing two or three times the required number of spaces. Large commercial buildings all have shower and/or gym facilities.

Mission Bay hopes to become one of the busiest hubs in the Bay Area Bike Share program. While the Mission Bay Project Area was excluded from the initial Phase 1 launch of the program in 2013, this community has been identified for subsequent phased expansions of the program. The TMA has helped identify specific locations within the Mission Bay community where bike-share stations would be most effective and have been requested. As multiple bike-share vendors enter the marketplace, the TMA facilitates introductions to the community.

Transit, bike and pedestrian information

Residents, employees and visitors to the Mission Bay community rely on the MBTMA's website as a clearinghouse for important transportation information related to Mission Bay.

Mission Bay TMA maintains a website that contains information on all conditions affecting travel to and from the area (including Giants home game schedules and times and other special events), Shuttle schedule information, BART, Caltrain, and SFMTA Muni and Muni Metro information and announcements, as well as other helpful information. The website also includes information on the location and pricing of parking structures; the location of nearby car-share pods; bicycle routes; walking distances to nearby destinations; and construction updates.

The website is well-utilized. In 2017, some 35,000 unique users accessed the TMA website over 93,692 sessions. Our audience spent an average of two minutes visiting 2 pages per visit.

Another element of the Mission Bay TMA's communication program is a Twitter feed. This mechanism is used to advise Shuttle riders of emergency updates that affect their immediate commute. It is also

used to remind riders of upcoming service changes, holidays, and other news. Approximately 350 people subscribe to this service. Because travel time has become so variable, we now only use this means of communication to communicate unusual, last minute incidents.

The Mission Bay TMA participates in annual events held by commercial offices and residential properties each year. This is an opportunity to interact directly with current and potential riders to educate them about alternate modes available and to get their feedback on the use of various facilities.

In 2017, the TMA attended employee events at Nektar Pharmaceuticals, Bayer, The Gladstone Institutes, FibroGen, Clovis Oncology and Cengage.

The Mission Bay TMA works closely with companies relocating to Mission Bay prior to their move-in date to educate employees about their options for commuting, to assist employers in setting up incentives and programs such as Clipper Direct. The TMA offers 'demonstration rides' on the Shuttle so local workers new to the neighborhood are familiar with the Shuttle's stops and operations, and so that new riders are comfortable and confident about the TMA's services from "day one".

The TMA has also facilitated the installation of TransitScreens, offering real-time transit predictions, the availability of bike shares and other modes for several commercial properties in Mission Bay.

The Shuttle real-time predictions are now available through all open 'apps' including GoogleMaps, Transit, Moovit, and others. The Shuttle changed from NextBus to a Swiftly prediction system in 2017.

Parking Management

Because alternative modes have also become the preferred modes of travel for most trips to and from Mission Bay, many of the parking structures are underutilized. The private garage on Owens Street currently meets the needs of all Owens Street properties, including the new Kaiser medical office building.

This has also proven true at the UCSF Mission Bay campus garages and is a significant factor in the rationale for UCSF's long-term planning which expands its total footprint in Mission Bay.

Flexible Hours/Telecommuting

The Mission Bay TMA works closely with the commercial tenants to encourage them to allow for flexible work hours and scheduling. Companies locating in Mission Bay are generally supportive of such alternatives for those employees for whom this alternative is appropriate. Over 52% of the respondents to our 2016 Commuter Survey report that their company allows flexible work hours. Flexible working hours include coming in before or after 'peak' times as well as working from home or other satellite locations. We see more of this behavior on days where there are 'special events' in Mission Bay or nearby, such as ballgames, during Fleet Week and other major events at Moscone Center.

On any given day, we estimate as many as 20% of those workers who do have flexibility, may be working remotely either on a regularly scheduled day, or on an ad-hoc basis.

What's Ahead

Shuttle Service

The Mission Bay Shuttle is implementing its most significant service change since its inception in early 2018 – it will serve Civic Center BART instead of Powell Street BART. Among the reasons for this:

- Shorter, more direct route to and from Mission Bay
- Avoidance of delays from events at Moscone Center, AT&T Park
- Avoidance of construction delays/lane closures on 4th Street
- Dedicated “Shuttles” zone at Civic Center BART
- Ability to serve new partners (CCA and 100 Hooper St) from Civic Center
- Seating capacity at Civic Center BART for the East-bound afternoon commute
- Shorter ‘total travel time’ for commuters

The Shuttle will also increase its TransBay service and add a stop closer to Montgomery BART to accommodate those commuters for whom Civic Center BART doesn't work.

A new partnership will serve CCA and the new tenants at 100 Hooper Street. CCA students and faculty will join the MBTMA in January; 100 Hooper Street will join mid-2018.

Service Planning

The response to the announcement of moving from Powell Street to Civic Center BART has been overwhelming. There are two predominant concerns: the unsafe environment at Civic Center and the distance between the BART fare gates and the stop at 9th & Market Street. Non-commuter-residents (who also fund the shuttle) also prefer the retail/entertainment destination of Powell Street.

Because of construction and delays in opening the internal street connections within Mission Bay as well as the delays in the new ‘shuttles only’ zone at 8th & Market, it will be several more months before an assessment can be made as to whether the move achieved its goal of safe, shorter travel times for commuters; as of early 2018, reliability has been a major issue.

The TMA is reaching out to employees and residents alike to get input and will reconsider its BART hub(s) in 2018.

We fear without significant and coordinated safety improvements at the street level, underground SFMTA and BART fare gates, riders will continue to spurn Civic Center Station, and our service. We also fear that growing homeless and drug encampments inside BART/SFMTA stations and on the streets, will continue to discourage ridership.

The ability to pick up and drop off riders as close to a transit hub as possible; and for them to have a safe, protected ‘waiting’ area is critical. Until the City effectively deals with the physical and safety conditions at major transit hubs, use of public transit will suffer. Until the City truly priorities ‘high occupancy travel’ over legacy valet parking and poorly enforced use of passenger loading zones by delivery and other non-passenger loading vehicles, its desire to make public transit and alternative modes the preferred ways of getting around the City will be stymied. Ironically, the lack of action on both of these

fronts is leading to greater congestion and increases in SOV and 'low occupancy vehicle' travel. A new approach to curb management and the transit hub environment is desperately needed.

The TMA is hopeful that curb management at the new TransBay Terminal may be more effective and will continue to lobby for Shuttle Zones at all Downtown BART stations to support "transit first."

The TMA is also facilitating the development of a pilot ferry service in Mission Bay, and will continue to evaluate opportunities to provide high occupancy trips via other means, such as smaller electric vehicles and Chariot-type services.

Marketing

The Mission Bay TMA will continue to market its TDM programs and communicate with residents and members through its website, emails, twitter feed, and other means. We will continue to be a visible presence at employee and community events, and will work closely with potential new riders, new residents and workers.

Coordination

The Mission Bay TMA will continue to represent Mission Bay on the Ballpark Transportation Committee, and will continue to coordinate with SFMTA, and other transportation efforts such as the SF Connect long-term transportation vision. The Mission Bay TMA will also continue to work closely with the Golden State Warriors as its arena and event center takes shape.

Mission Bay TMA plans to continue to work with SFMTA staff to work through the unique circumstances of our community Shuttle as a participant in the City's Commuter Shuttles Program. Our shuttle service is unique. We are open and fare-free to all. We are funded by our community of residents and property owners. We cost San Francisco nothing – and all we ask is for curb space that enables us to do what the City has mandated. We are hopeful of finding new solutions to our shared goals – namely, providing safe, efficient transportation modes for workers and residents in Mission Bay, while discouraging single-occupant-vehicle driving.

2018 Budget

The Mission Bay TMA is funded entirely by fees from the local community of residents and commercial property owners in and around Mission Bay. Annual budgets and fees for the coming calendar year are established each fall. Residential fee increases must also be approved by the California Department of Real Estate up to two years in advance of implementation.

Since start-up in 2010, residential rates have risen from \$5 to \$10 per month; commercial rates have risen from \$0.10 per foot to \$0.30.

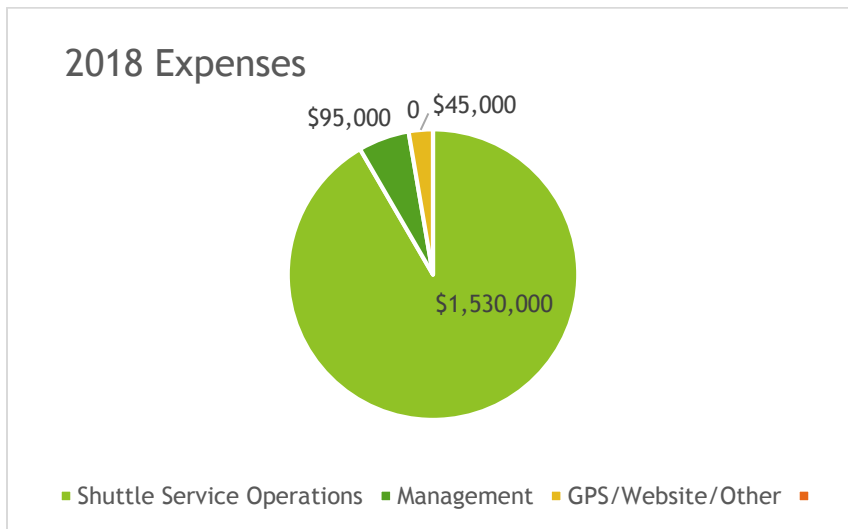
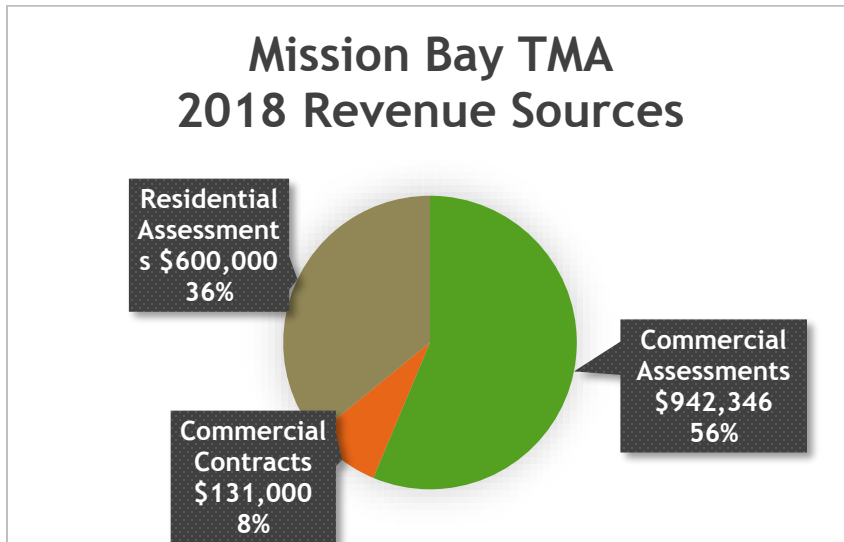
The rates for 2018 are:

Residential units pay \$10 per month

Commercial properties pay \$0.30 per square foot per month

Affordable housing, City and UCSF occupied properties are exempt from paying dues.

Figure 4: Revenue Sources for 2018



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