

2018  
ANNUAL REPORT



Pictured: SFMTA white curb zone, "Passenger Loading/Unloading Only".  
Currently used exclusively as mall valet parking. 5th & Market Streets

March 2019

Mission Bay TMA

## MISSION BAY TMA

### EXECUTIVE SUMMARY

Construction in every form – buildings, streets, utilities, and parks – was the norm in Mission Bay and the SOMA area throughout 2018. Notably, construction of just one project -- The Exchange, a new 600,000 sf office complex at 1800 Owens Street was completed, although not occupied in 2018. The segment of Owens Street fronting this project was also completed per City plans and specifications, opened to traffic, and then promptly deemed insufficient by SFMTA, resulting in unplanned turn restrictions between 16<sup>th</sup> and Mariposa streets which greatly limits this new thoroughfare.

Simultaneous construction in the southeastern quadrant of Mission Bay of the new Chase Event Center, Uber Towers, UCSF medical and office buildings and associated street and utility improvements on 3<sup>rd</sup> Street, South Street, Terry Francois Boulevard and Illinois Street, plus expansion of the SFMTA Muni boarding platform all had significant negative impacts on travel patterns and times for the Mission Bay Shuttles.

In addition, UCSF construction along both sides of 4<sup>th</sup> Street, and farther north, at Channel Street, private construction of a new 250-room hotel caused major transportation impacts, as did a prolonged closure of the Third Street Bridge early in the year.

While neither the local workforce nor residential population expanded significantly in 2018, unrelenting closures, delays and detours from the above projects caused major challenges for those trying to commute to and/or visit Mission Bay. Increased car commuter and TNC traffic, new construction, utilities and road work outside Mission Bay along 7<sup>th</sup>, 3<sup>rd</sup>, 4<sup>th</sup> and 2<sup>nd</sup> Streets also negatively affected travel in and out of Mission Bay. The growing number of car trips to and from the UCSF hospitals and Mission Bay campus also exacerbated congestion.

### Mission Bay is Close to Completion

By 2020-2021, Mission Bay will be near full buildout. The Chase Event Center will open in Fall, 2019. Uber's towers and UCSF's new facilities on Illinois Street will follow shortly after that. Reconfiguration of Terry Francois Blvd., expansion of the Muni platform at 3<sup>rd</sup> and 16<sup>th</sup> Streets, and other major street improvements should be complete. The new hotel at 3<sup>rd</sup> and Channel Streets will be completed by Summer, 2020. Finally, every year from now through 2025 in Mission Bay, one new large multifamily residential property is projected to open, which will essentially complete the Mission Bay Redevelopment Plan.

By the end of 2019, Dropbox will occupy its new headquarters at 1800 Owens with 3,400+ employees. The Chase Center will begin hosting events plus the Warriors basketball team, adding another 200-500 workers to the daily mix. UCSF's new properties will add hundreds more. In 2020, Uber will bring an

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estimated 7,000 workers to Mission Bay, more than doubling the daytime population. The daily ‘visitors’ population – including many who are visiting Mission Bay for the first time at the UCSF Hospital or Chase Event Center – will also mushroom by anywhere from 5,000 to 20,000, depending on the event or occasion.

This growth brings an imperative for the public and private transportation systems to work seamlessly and in close coordination with each other to meet the increased demand. Information, wayfinding, and access all need to become more ‘user-centric’ instead of agency-centric and in silos.

<b>Mission Bay 2018 Population</b>			
<b>Non-UCSF (estimated)</b>		<b>UCSF (estimated)</b>	
<b>Employees</b>	<b>6,500</b>	<b>Employees</b>	<b>6,150</b>
<b>Residents</b>	<b>9,600</b>	<b>Residents</b>	<b>1,000</b>
		<b>Students</b>	<b>1,200</b>
		<b>Patients</b>	<b>2,265</b>
		<b>Visitors</b>	<b>1,432</b>

**2018 Survey Results**

The Mission Bay TMA’s 2018 survey of residents and employees revealed the following characteristics and commute patterns:

**Where Employees Live**

- 14% live and work in Mission Bay
- 5% live in SOMA
- 24% live in other parts of San Francisco
- 41% live in the East Bay
- 23% live in San Mateo or Santa Clara counties
- 4% live in the North Bay

**Where Residents Work**

- 40% work Downtown
- 7% work in the South Bay
- 15-20% don’t work

**Employee Commute Mode**

- Drive alone                    23%
- Carpool/ride-hail        5%

- MB Shuttle 35%
- Muni 5%
- BART + active 4%
- Caltrain + active 11%
- Active (walk/bike) 7%
- Other 10%

The survey also indicated that:

- Evening commutes are longer than morning commutes
- 70% of employees arrive between 7am and 9am; 18% between 9am and 10am
- 67% of employees leave between 4pm and 6pm; 15% leave after 6pm; 15% leave before 4pm
- Powell Station was ranked the safest and most convenient BART and Muni transit hub connection
- It currently takes ‘too long’ to get to any of the transit hubs, and travel time is an important factor in mode choice

In keeping with recent trends, our 2018 survey found that 27% of employees and 28% of residents work from home at least once a week.

## TDM PROGRAMS

The 1999 Transportation Systems Management Plan for Mission Bay, via agreements executed by the City and County of San Francisco, the Redevelopment Agency (now OCII), and the Master Developer, requires a combination of both general strategies and specific TDM measures.

In pursuit of the MBTMA’s purpose to reduce SOV trips to and from Mission Bay, its programs have always been **free and open to the public**. The TMA estimates between 35% and 40% of shuttle users come from properties who do not make any financial contribution to the TMA. Financial participation is mandatory for all residential and commercial properties in the Mission Bay Development Area, with two exceptions. Low income residential properties are not assessed, and City and State agencies have the option to exempt themselves from the requirement and do so. The SFMTA Shuttles program, established in 2014, also requires free public access in order to be exempt from stop fees which would cost the TMA well over \$150,000 -annually.

TSM STRATEGY	IN 2018...
<i>Develop services, facilities, incentives and policies that make public transit the preferred means of access to Mission Bay</i>	The consistently low drive-alone rate for both employees and residents of Mission Bay speak to the effectiveness of the community’s TDM programs. <i>Source: MBTMA Annual e-Surveys</i>
<i>Coordinate the development and delivery of TSM activities among property owners and tenants in Mission Bay</i>	MBTMA works closely with the SFMTA, UCSF, and its member employers and property owners to deliver seamless services and information to the traveling public.
<i>Promote, encourage and facilitate the use of ridesharing, bicycling and walking</i>	The TMA actively promotes legacy and new (e.g., bikeshare) programs.

TSM STRATEGY	IN 2018...
<i>Manage the supply and demand of commercial parking to provide sufficient capacity primarily for business visitors and persons traveling in high occupancy vehicles</i>	The TMA has no management or enforcement authority; that rests with the Planning Department and other City entities responsible for permitting, approvals and monitoring/enforcement.
<i>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</i>	MBTMA works closely with the SFMTA, UCSF, and its member employers and property owners to minimize duplication of services and tries to provide anyone traveling to/from the community an array of options other than driving alone.
<i>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</i>	The TSM Plans for Mission Bay are now 20+ years old and much has changed. The TMA's services, transit hubs, and programs have changed in the first decade of operations; more shifts are expected in the near future.

The following TDM measures are also specified in the Plans:

TDM MEASURES	IN 2018...
<p><b>Shuttle Services</b></p> <p><i>“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...</i></p> <p><i>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.”</i></p> <p><i>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</i></p>	<p>MB Shuttle boardings totaled 255,014 in 2018. Ridership declined for the fourth consecutive year in 2018 for a variety of reasons. Among them:</p> <ul style="list-style-type: none"> <li>• Public transit ridership trends are also declining</li> <li>• Increased travel times and unreliability due to congestion in and between Mission Bay and downtown transit hubs make the Shuttle a less attractive and efficient option for commuters</li> <li>• Safety concerns at transit hubs</li> <li>• Inconvenient, inefficient routes and stop locations both within Mission Bay and around transit hubs</li> <li>• Increasing numbers of people who work from home at least one day a week</li> <li>• New transportation options such as ride-hailing and subscription services</li> <li>• Transbay customers are unhappy that the new terminal has been shut for so long and the stop is too far from the Temporary Terminal</li> <li>• We suffered significant losses when our transit-hub stop was moved from Powell BART</li> </ul>

TDM MEASURES	IN 2018...
<p><i>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..."</i></p>	<p>to Civic Center; since moving back to Powell, only a small portion of riders have returned</p> <ul style="list-style-type: none"> <li>• It is faster to walk to Caltrain from many parts of Mission Bay than to take the shuttle</li> </ul> <p>Two adjacent projects – 100 Hooper and CCA – have contracted with MB Shuttle to provide service to employees and students rather than operate their own service. These customers are served by one vehicle from Civic Center.</p> <p>One off-site contract with Cengage Learning, at 303 2<sup>nd</sup> St., did not prove productive or efficient for either Cengage or MB Shuttle, and will be discontinued in 2019.</p> <p>At this time, there no other stops are contemplated.</p>
<p><b>Guaranteed Ride Home</b>  <i>"Offer Guaranteed Return Trip at no cost if an emergency requires earlier or later departure."</i></p>	<p>All employers in MB are automatically enrolled in the City's GRH program through their affiliation with MBTMA.</p>
<p><b>Transit Pass Sales</b>  <i>"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."</i></p>	<p>Transit passes have long been replaced by Clipper Card and/or other means provided by employers directly to their employees. For others, Clipper Cards, Muni one-day fares and other occasional use fare media are readily available at Walgreen's drug stores, Whole Foods, and other outlets throughout the Bay Area, offering convenient access to potential users. Mission Bay Shuttle is free and open to anyone.</p>
<p><b>Employee Subsidies</b>  <i>"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."</i></p>	<p>Many MB employers already work with Caltrain to provide the GoPass to their employees. It is unfortunate that SFMTA does not offer such a program; we firmly believe it would be well utilized and could curtail the over-use of congestion-causing ride-hail services.</p> <p>Participation in MBTMA by every property owner in MB (except the City and UCSF) provides the operating subsidy for the 'free' MB Shuttle.</p>

TDM MEASURES	IN 2018...
<p><b>Bicycle Parking</b>  <i>“Make recommendations for bicycle parking in Mission Bay common areas that is both accessible and efficient.”</i></p>	<p>Bicycle parking in MB is largely at capacity. Most individual properties have expanded their facilities well beyond required minimums. JUMP, Ford GoBikes, and other new bike-share companies are extremely interested in serving MB. The TMA is working with them to identify appropriate locations and the number of bikes needed.            Public facilities are maintained by the MB Maintenance Associations.</p>
<p><b>Transit, pedestrian and bicycle route information</b>  <i>“Disseminate transit, pedestrian and bicycle route information.”</i></p>	<p>Information is available on the MBTMA’s website (<a href="http://www.missionbaytma.org">www.missionbaytma.org</a>). The website contains a variety of transportation information: shuttle schedules and routes, as well as bicycle, parking and other resources.             MBTMA’s Twitter and Doublemap (real time GPS) keeps shuttle riders informed of updated conditions.             MBTMA is a regular participant at employer-sponsored annual Fairs. In addition, the TMA reaches out to both residents and employees when planning service changes. The TMA participates in area working groups such as the MB Ballpark Transportation Coordinating Committee.</p>
<p><b>Parking management</b>  <i>“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.”</i></p>	<p>The MBTMA has no authority in this domain.</p>
<p><b>Flexible work time/telecommuting</b>  <i>“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.”</i></p>	<p>According to our 2018 survey, 27% and 28% of employees and residents, respectively, now work from home at least once a week. Over 70% of employees say their employer offers flexible hours and/or schedules.</p>

TDM MEASURES	IN 2018...
<p><b>Ferry service</b>  <i>“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.”</i></p>	<p>In 2018, MBTMA facilitated presentations by two private companies interested in doing business in MB – SF Prop and Tidelines. We conducted a survey which determined a high level of interest in a ferry between Pier 52 and the East Bay. A pilot service may be implemented in 2019 by Tidelines.</p>
<p><b>Monitoring and reporting</b>  <i>“Conduct an annual survey of employee commute patterns among tenants in Mission Bay. Produce and submit an Annual Report.”</i></p>	<p>This Report summarizes operations and the 2018 survey.</p>

## 2019 AND BEYOND

Mission Bay’s non-UCSF workforce will more than double in the next two years with the opening of Uber’s Towers and Dropbox. The UCSF workforce will more than double in the next several years according to its long range planning forecast. This, coupled with increasing numbers of visitors headed for the Chase Event Center and UCSF hospitals and clinics, will place extreme stress on MB’s existing transportation infrastructure and resources.

While we are optimistic that the shuttle program can incrementally expand to meet the needs of the employee population, serving the growing ‘visitor’ population presents some unique challenges. Employees and residents share commonalities and complement one another. For example, Mission Bay residents typically use the Shuttle in the ‘reverse’ direction but during the same time hours as riders who commute to work in Mission Bay, a ridership pattern which increases efficiency. Likewise, the same transit hubs tend to work for both these groups.

On the other hand, visitors to Mission Bay typically have different needs and travel patterns. Many are coming for the first (and perhaps only) time, are not familiar with the area, and not likely to research their options before their visit. After all, as a one-time or occasional visitor, they have little incentive to do so. Nonetheless their choices and behavior greatly impact the community on a daily basis.

UCSF’s daily visitor population will nearly double; the Chase Center will host activities on more than 300 days each year with anywhere from 5,000 to 20,000 attending.

In addition to needing service that extends beyond the MB Shuttle’s traditional ‘peak hour, weekday’ schedule, people who are entering MB for the first time need clear, consistent information about their options, connections, etc. The lack of signage at stops both in MB and at transit hubs for the free MB Shuttle may become a serious issue. It is already a significant complaint even from ‘regulars’ who live and/or work in the area. Parking and congestion will worsen as more visitors drive, either because how



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to get here via other means is not clear, is too time consuming, expensive, or not available to many. This could become a destructive cycle that overwhelms all local resources.

It will require unprecedented levels of cooperation and coordination to succeed.

Despite decreases in public transit and planned SFMTA service increases, SFMTA is and will remain at over-capacity.

**Support from UCSF:** The MB Shuttle will not be able to provide desired levels of service without financial participation from one of its major users, UCSF. UCSF has thus far opted not to officially participate or contribute financially to the Mission Bay TMA, while still enjoying the benefit of the public access provided by the TMA Shuttle. Our privately-funded “free” public Shuttles supplement UCSF’s own shuttle service, which remains entirely off-limits to the general public and other riders in Mission Bay. We are absorbing the ‘public’ -- including thousands of UCSF’s students, faculty and staff -- with no reciprocation or contribution from UCSF.

**Support from the City / SFMTA:** In order to encourage use of shared transport such as the Mission Bay Shuttle, SFMTA can proactively support this free public service. It can support operations by allowing the use of Bus Only lanes, allowing left turns in and other roadway flexibility to shorten routes, make them more direct and increase travel speeds. The City can also prioritize Mission Bay Shuttle access at transit hubs, reducing undue congestion from ride-hail services, valet, and other lower occupancy modes so that taking transit is rewarded with the most proximate, safe and convenient access points at all hubs. Arguably, the Mission Bay Shuttle is significantly more ‘public’ than traditional public transit itself, in that it is a free service to all who wish to use it, supported entirely by locally generated assessments.

**2018 REVENUES**

MB Residential Assessments	\$576,960 (37%)
MB Commercial Assessments	\$768,500 (49%)
Other Commercial Assessments	<u>\$205,400 (13%)</u>
<u>Total Revenues</u>	<u>\$1,550,860</u>

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