
2019 Annual Report

Mission Bay TMA

April, 2020

1 EXECUTIVE SUMMARY

Status of the Mission Bay Project Area

2019 marked the near-completion of most of the large-scale construction projects in Mission Bay.

Chase Center opened in August 2019. The exterior shells of UCSF's new facilities on Illinois Street were finished (although interiors were not completed). The Chase Center office towers' shells were completed; interiors are a work in progress with occupancy slated for late 2020 and early 2021.

The major roadwork and utilities along Terry Francois Blvd, 16th Street, and Illinois also concludes with these projects coming online.

Dropbox moved 3,000+ employees into The Exchange at 1800 Owens; work continued on the new hotel on Channel and 3rd^h Street and at several other smaller residential projects. UCSF construction on an array of projects between Third and Fourth Streets also continued. Its population of employees, outpatients and visitors climbed by 1,000+ employees.

SFMTA's work on the Central Subway, expansion of its passenger platform at Chase Center and the retrofit of the Third Street Bridge were part of daily lives throughout 2019.

For the first time most of Mission Bay's internal streets were open and by year-end, shutdowns of major arterials were minimal.

Close to Buildout

By the end of 2020 or the beginning of 2021, occupancy at the Chase Center Towers and the adjacent two Uber office buildings on Third Street will bring another 7,000 employees to Mission Bay. UCSF's population of faculty, patients, staff will continue to grow, and the majority of private development within the Mission Bay Development Area will be complete. *Note the now-in-progress Mission Rock development project along Third Street and near Piers 48 and 50, is not considered part of the Mission Bay TMA geographic area despite its significant impact.*

2019 Population

	Private Businesses	UCSF
Employees	10,000	6,700
Residents	9,600	1,000
Students	n/a	1,200
Patients (outpatients)	n/a	1,575 (per day) 400,000 annual
Visitors	200-400/day	2,368

Above estimates are from employers self-reporting and UCSF planning dept.

Mission Bay Shuttle in 2019

Ridership returned to 2017 levels with 320,000+ boardings in 2019, beginning to reverse a three-year decline that began in 2016.

The most significant lesson learned in the past three years is that safety on public transit systems has skyrocketed as a primary concern for both residents and employees. Whereas in 2016, safety at bus stops and on transit was at the bottom of the list of factors our community used to make commute decisions, in 2019 it was second only to total travel time in how commute decisions are made. Safety eclipsed historic factors such as convenience, avoiding driving in traffic and the costs of driving and parking in commuters' decision-making process.

There appears to be a direct correlation between growing safety issues at transit stations, on trains and buses as well as at shuttle street-side stops and increases in the drive-alone rate. While carpooling, ride-hailing, walking and biking have remained fairly stable, the most significant changes in the past three years have been between taking some form of transit and driving.

The table below illustrates the change from 2016 to 2019:

	2016	2019
Drive alone	11.1%	22.2%
Carpool, Vanpool, Drop Off	4.6%	3.4%
Ridehail or taxi	1.8%	1.8%
Walk or Bike	6%	6.8%
Transit (includes transit + shuttle; transit + walk, etc.)	63.5%	52.6%
Other	6.9%	12%

The proliferation of homeless encampments at both Civic Center and Powell transit hubs as well as increasing safety issues on BART and other transit given many employees and residents reason to question their use of the shuttle (and public transit). Partly in response to these concerns, our Transbay route which serves the 'safer' Embarcadero and Montgomery hubs, has grown to become our largest route in spite of having the longest travel times. Other former transit users have simply forsaken using transit and returned to their SOV's. This assertion is further reinforced by comparisons that show the rates of walking, biking, and other forms of carpooling/rideshare remained stable in the same three-year period.

As of early 2020, we relocated our Civic Center and Powell transit hub stops to locations which appear to be safer, although neither is in an SFMTA-approved shuttle zone. However, the trade-off is clear – riders responded immediately both with increased ridership and positive feedback. Unfortunately, neither of these stops is officially a 'shuttle' zone or a shared SFMTA stop to relieve competition with Lyft/Uber and taxi's and both stops lack signage. Mission Bay Shuttle has needed to relocate stops frequently in the past three years to its disadvantage; riders are often confused about where we stop, and it takes years to rebuild trust with our riders and give them confidence that our stops will be located in a safer environment. It can be noted that prior 2016 when public transit to Mission Bay was very limited, the drive alone rates were 21 to 23%.

2 OVERVIEW OF 2019 SURVEY RESULTS

Employees (324 responses)

- Where employees live has remained stable since the 2018 survey, with over 40% living in San Francisco (about 17% in Mission Bay and/or SOMA); another 40%+ in the East Bay; 18% in San Mateo and Santa Clara counties; 4% in the north Bay, and 7% ‘other’ (further out or entirely out of the Bay Area).
- The number of employees working from home at least one day a week also remained stable at 27% between 2018 and 2019.

Residents (90 responses)

- Consistent with past years, 35.5% of residents work in Downtown San Francisco; 9% in other parts of the City; 9% in the East Bay; 6% in the South Bay; and 19% don’t work. Some 14% of residents surveyed work in Mission Bay (those numbers are included in the employee counts above).

2019 Summary Findings

- The drive-alone rate for employees was 22.2%; it was 4.4% for residents
- Active transportation (those who walk, scooter or bike) was 7.3% for employees; 13.3% for residents.
- Some 17.4% of employees use some form of active transport in combination with transit; some 34.3% of residents combine these modes.
- Altogether, the Mission Bay Shuttle is used (either alone, in combination with other public transit, or with an active mode) by 52.3% of employee survey respondents; and by 43.10% of residential respondents.

The tables below detail 2019-2020 survey results

Question: How do you normally get to work?

90 residents and 324 employees responded to this question.

	2019	
	Residents	Employees
Drive alone	4.4%	22.2%
Carpool or get dropped off	0%	4.6%
Ride hail (Uber, Lyft, taxi)	0%	1.8%
Walk or scooter or motorcycle	10%	3.3%
Bike	3.3%	4.0%
BART + Mission Bay Shuttle	2.2%	19.7%
Caltrain + Mission Bay Shuttle	2.2%	3%
Bus (Muni, AC Transit, etc) + Mission Bay Shuttle	4.4%	11.1%
Ferry + Mission Bay Shuttle	0%	1.2%

Walk + Mission Bay Shuttle	16.6%	4.3%
Muni + Walk or Bike	13.3%	5.5%
Caltrain + Walk or Bike	2.2%	3.3%
BART + Walk or Bike	2.2%	4.3%
Other Shuttle (UCSF, Gap)	0%	3%
Other*	0%	12%
No Response**	38.8%	0%
Totals	100%	100%

*Employee survey: Other included BART + Uber; BART + Scooter; getting dropped off (no additional drive-alone)

**Residents who did not respond to many commute-oriented questions are those who do not work.

Question: How many days a week do you commute in the pattern described above?

55 residents and 324 employees responded to this question.

	Residents	Employees
1 day a week	1.1%	<1%
2 days a week	4.4%	3%
3 days a week	8.8%	12.6%
4 days a week	10%	20%
5 days a week	35.5%	61%
Other	1.1%	1.8%
No response		<1%

The number of employees commuting five days a week is declining slightly as more people are working from home (or other remote locations) on a regular basis. In 2015, 73.7% of those surveyed said they commuted in the ‘usual’ pattern five days a week; in 2016, the number of daily commuters dropped to 63.5%; and in 2019, that number decreased to 61.4%. This trend is further supported by the table below which shows 34.5% of residents and 27.4% of employees regularly work from home. It should be noted that the 2019 question asks if employees can commute *at least once a week*; many do so more than once a week. Variations in commute patterns are also reinforced by daily ridership statistics which show Mondays and Fridays having lower ridership than mid-week.

Question: Which of the following describes your typical work schedule?

55 residents and 324 employees responded to this question (multiple answers)

	Residents	Employees
I work a typical Mon-Fri schedule	78.1%	82.4%
I can work remotely at least once a week	34.5%	27.4%
I travel frequently for work	7.2%	4.9%
I work a combination of weekdays and weekends	7.2%	5.5%



Other	5.4%	2.4%
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While the statistics are similar for Mission Bay’s employee and residential populations, it’s interesting to note that residents work from home, travel frequently and work some weekends at slightly higher rates.

Question: How long does it typically take to get to work?

90 residents and 324 employees responded to this question.

	Residents	Employees
Less than 15 minutes	7.7%	3.7%
16-30 minutes	21.1%	14.8%
31-45 minutes	18.8%	16.6%
46-60 minutes	7.7%	25.9%
Over 60 minutes	5.5%	33.9%
Other	0	4.3%
No response	38.8%	<1%

Total travel time between employee respondents’ home locations and work sites increased slightly from 2018 in the 45 minutes or less categories, however it fell from 42% to 34% in the ‘over 60 minutes’ category and increased from 20.7 to 25.9 in the 46 minute-to-60-minute category. This seems to indicate that 60+ minute morning commutes are improving somewhat; shorter commutes are worsening slightly.

Question: How long does it typically take you to get home from work?

90 residents and 324 employees responded to this question

	Residents	Employees
Less than 15 minutes	5.5%	2%
16-30 minutes	15.5%	15%
31-45 minutes	25.5%	14%
46-60 minutes	6.6%	22%
Over 60 minutes	7.7%	42%
Other	0	5%
No response	39.2%	0

This table reflects shorter commutes for residents. Evening commutes are also a few minutes longer than morning commutes – particularly for 60+ minute commutes.

Question: What time do you normally arrive at work?

90 residents and 324 employees responded to this question

	Residents	Employees
Before 7am	3.7	9.5
Between 7:01 and 8am	6.6	26.2
Between 8:01 and 9am	28.8	40.4
Between 9:01 and 10am	14.4	21.6
After 10am	5.5	1.2

Other	2.2	1.2
No response	38.8	0

The majority of Mission Bay residents and employees arrive in typical AM commute times (7am to 10am). More residents go to work after 10am than do MB employees, but more employees arrive in MB for work before 7am than residents going towards Downtown. The sizeable ‘no response’ from residents is reflective of those who do not work.

Question: What time do you normally leave work?

90 residents and 324 employees responded to this question

	Residents	Employees
Before 3pm	0	<1
Between 3:01 and 4pm	5.5	9.2
Between 4:01 and 5pm	5.5	28.7
Between 5:01 and 6pm	30	44.7
After 6pm	17.7	14.8
Other	2.2	1.2
No response	38.8	<1

Again, we see very typical PM commute patterns among both groups, with most commutes taking place between 4pm and 6pm. The same 9% of employees who leave between 3pm and 4pm are likely those arriving before 7am.

Flex Time

56% of residents (who work) and 58% of employees report their employer offers flex time. 14% of employees weren’t sure. This indicates employers could communicate more clearly about flexible work hours.

Transit Hubs

Asked how **convenient** each transit hub is to riders:

- Both residents and employees slightly prefer Powell Street
- Employees were evenly split between Montgomery and Civic Center as the second-most convenient station
- Residents prefer Montgomery as the second-most convenient station
- Embarcadero/Ferry was the third choice for both groups; Transbay the 4th

Employees were asked to rank the factors that most influence their commute decisions.

As in past surveys, total travel time between home and work remains the most important factor cited. The following list ranks the importance of other factors for 2019:

1. Travel time between home and work
2. Safety at transit hubs and on public transit
3. Environmental concerns
4. Availability of guaranteed parking in or near Mission Bay
5. Cost of driving, including tolls, gas, etc.
6. Cost of parking in Mission Bay
7. Availability of parking at my starting point

The biggest difference from past surveys is the cost of driving and parking has taken a back seat to safety and environmental concerns.

Asked if employees leave early, later, or try to work remotely when there is a special event at Oracle Park, Chase Center, or Moscone Center, 43% responded yes, while 56% responded no. Many of the ‘no’ respondents are not able to adjust their work schedules. Many who are able to work remotely do so on home game days.

Some 41.6 of respondents report special events make their commute up to 15 minutes longer; 31.4% say these events add 16 to 30 minutes; and 10.1% report events add 31-45 minutes to their homebound commute. Nearly 8% say commuting takes 46 minutes to over an hour longer on special event days.

Many respondents did note that delays due to events at Chase Center have been minimal, while events at Oracle Park and Moscone Center continue to be challenging for their commutes. These results speak to the efficacy of Chase Center’s comprehensive investment in and commitment to TDM, including participating in the Mission Bay Shuttle for its employees and patrons; the level of proactive on-the-ground traffic management extending beyond its immediate vicinity; free Muni rides and overall communications.

Residents were asked how **safe** they feel both inside and outside of transit hubs. Embarcadero Station was ranked the safest transit hub, followed closely by the TransBay Terminal, then Montgomery Station, Powell, and lastly, Civic Center. It will be interesting to note over time, the effects of the Salesforce Transbay Terminal’s restrictions on loitering and how they impact both real and perceived personal safety.

The Powell Station had a very slight advantage for residents when asked about **travel time**, with Montgomery, TransBay and Embarcadero all tied in second place; Civic Center came in slightly less. It’s interesting to note the slight differences between safety, convenience and travel times. None of the differences are appreciable.

Residents were also asked how important the shuttle is to them; the average rating (from 64 responses) was 4.0 on a scale of 1 to 5, with 5 being very important. Employees were not asked this question.

Suggestions on how to improve service was consistent among both residents and employees.

- As in past surveys, greater frequency of service is always desired.
- One improvement cited by both residents and employees is to improve travel time to Transbay Terminal/Embarcadero by making this route more direct with fewer stops in the afternoon
- The lack of shuttle stop signage at transit hubs and in Mission Bay is also a continuing point of confusion.
- Overall, both residents and employees are pleased with the new transit hub stop locations for Civic Center and Powell stations and improved reliability of service

3 MISSION BAY 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, the shuttle has always been **free and open to the public**.

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; both the City and UCSF do so. The SFMTA Shuttles program, established in 2014, also requires free public access in order to be exempt from stop fees.

The TMA estimates between 35% and 40% of shuttle users come from properties who do not make any financial contribution to the TMA. The largest such entity is UCSF.

TSM Strategy	In 2019...
<i>Develop services, facilities, incentives and policies that make public transit the preferred means of access to Mission Bay</i>	Even though SOV rates have risen in the past three years, we believe transit is still a preferred mode. Unfortunately, safety concerns prevent many from using public transit. The immediate uptick in shuttle ridership since relocating our Market St stops to safer locations (and the slight decrease in SOV from 2018 to 2019) give us hope that as safety improves, so will use of public transit. <i>Source: MBTMA Annual e-Surveys and focus groups</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, BART and other transit agencies; UCSF, and TMA member employers and property owners to deliver seamless services and information to the traveling public. In late 2019, we launched a ‘subscribe’ button on our website which currently has over 250 subscribers and adds 5-8 new people per week.
<i>Promote, encourage and facilitate the use of ridesharing, bicycling and walking</i>	The TMA actively promotes legacy and new (e.g., bikeshare) programs on its website.
<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</i>	The TSM Plans for Mission Bay are now 20+ years old and much has changed. The TMA’s transit hubs, and programs have changed multiple times. We continue to refine routes and stops to maximize efficiency and frequency

TSM Strategy	In 2019...
<i>range of uses and different levels of service demand</i>	for our riders and to adapt to constantly changing conditions.

The following TDM measures are also specified in the Plans:

TDM Measures	In 2019...
<p>Shuttle Services <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 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>MB Shuttle boardings totaled 320,000 in 2019, an increase of 65,000 over 2018.</p> <p>These increases took place in spite of declining public transit ridership, safety issues both at our transit hubs and on BART and Muni.</p> <p>Chase Center and Dropbox both opened bringing over 5,000 new employees into Mission Bay, although the number of new riders from Dropbox is limited as it maintains its own shuttle. UCSF expanded by some 500 employees and its visitor population increased by nearly 1,000 per day.</p> <p>Two adjacent projects – 100 Hooper and CCA –contract with MB Shuttle to provide service to employees and students</p> <p>At this time, there no other stops are contemplated although we are once again in dialogue with China Basin.</p>
<p>Guaranteed Ride Home <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>

TDM Measures	In 2019...
<p>Transit Pass Sales <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>Employers coordinate the sale of transit passes through their HR/Benefits departments directly with Clipper Card or third party administrators. For others, Clipper Cards for cash fares, 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>Employee Subsidies <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>58.6% of Mission Bay employees surveyed report their employer subsidizes transit passes and carpools. Another 15% work for companies who also provide private shuttles. Participation in MBTMA by every property owner in MB (except the City and UCSF) provides the operating subsidy for the ‘free’ MB Shuttle.</p>
<p>Bicycle Parking <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. All bike-share companies are extremely interested in serving MB. There are currently 9 bikeshare stations in Mission Bay with a capacity of over 250 bikes. All are well utilized. The TMA works with vendors on request to identify appropriate locations and the number of bikes needed. Public facilities are maintained by the MB Maintenance Associations.</p>

TDM Measures	In 2019...
<p style="text-align: center;">Transit, pedestrian and bicycle route information</p> <p><i>“Disseminate transit, pedestrian and bicycle route information.”</i></p>	<p>Information is available on the MBTMA’s website (www.missionbaytma.org). The website contains a variety of transportation information: shuttle schedules and routes, as well as bicycle, parking and other resources. In 2019, over 59,000 users visited the website, looking at an average of 2.45 pages per visit and spending two minutes, 45 seconds on it.</p> <p>MBTMA’s Twitter and Doublemap (real time GPS) keeps shuttle riders informed of updated conditions.</p> <p>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 also participates in area working groups such as the MB Ballpark Transportation Coordinating Committee and construction logistics meetings.</p>
<p style="text-align: center;">Parking management</p> <p><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 style="text-align: center;">Flexible work time/telecommuting</p> <p><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 2019 survey, 28% and 34% of employees and residents, respectively, now work from home at least once a week. Over 27% of employees say their employer offers flexible hours and/or schedules.</p>

TDM Measures	In 2019...
<p>Ferry service <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>Tidelines began operating ferry service between the East Bay, Ferry building and Mission Bay in 2019. MBTMA promotes the service on its website and through occasional e-blasts as updates are made.</p> <p>We’re working with Bay Planning Coalition on the potential for a ‘local’ pilot which would connect our community via ferry between Hunter’s Point and North Point.</p>
<p>Monitoring and reporting <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 MB Shuttle’s 2019 operations and survey.</p>

2020 and Beyond

Private development will reach its maximum of approximately 12,000 employees by the end of 2021. Uber’s occupancy of the Chase Center Towers and two adjacent office buildings on Third Street will be the last ‘large’ employer-tenant. Residential construction is also now capped with some 4,808 units. Other private development within the geographic confines of the Mission Bay Development Area subject to participation in the TMA will be nominal; another 200+ low income residential units will not contribute to the MBTMA.

UCSF continues to expand and consolidate its workforce and patient facilities in Mission Bay and directly south, in Dogpatch. By 2035, UCSF will more than double both the number of faculty and staff working in Mission Bay as well as its visitor population.

Similarly, the Giants project will add substantial numbers of new employees and residents to the Mission Bay community.

While the Mission Bay Shuttle can grow incrementally to meet its members’ needs within its current financial structure, continuing to provide a ‘free community service’ is at stake. It will not be able to accommodate UCSF’s 8,000+ more UCSF employees and 1,400+ visitors. Nor will it be able to accommodate the new population at the Mission Rock development without degrading service to its paying members. This will become a critical challenge for the Mission Bay Redevelopment Plan Area in the short-term, as a greater percentage of adjacent large developments are excluded or exempt from TMA participation, and no additional new revenues are available.

We would encourage cooperation between MTA, Planning and other agencies with jurisdiction to ensure projects such as Mission Rock, and institutions which are exempt such as UCSF, are participating to preserve the financial sustainability of the Mission Bay TMA's flagship shuttle service.

Resolving health and safety issues both on the streets, inside transit stations and on trains may be the most daunting challenge to the future of public transportation. To this end, cooperation and collaboration among transit providers, law enforcement, health and human services, and the local business community is needed on a massive scale that has not yet been created.

As SFMTA continues towards its 'transit first' goals, it needs to recognize that without including ALL transportation modes in planning and decisions that support this policy in more meaningful and comprehensive ways, these policies will never achieve their full potential.

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