

2021 Annual Report

April 2022



MISSION BAY TMA
Mission Bay Transportation Management Association

Executive Summary

Several new buildings came online in 2021: UCSF's medical office buildings on Illinois St, Uber's two office towers adjacent to Chase Center; and a new hotel at the northern end of Mission Bay. All except UCSF contribute to the Mission Bay TMA.

Construction has begun on the last commercial building within the MBTMA geographic boundary: a small lab/office at 1450 Owens Street. Its anticipated completion is Q4 of 2023. The elementary school planned on Owens St has not yet begun construction as of this writing (early spring, 2022).

Once these projects are complete, Mission Bay will be fully 'built out.' Only parks and other public spaces will remain to be developed.

2021 was the second year of workers and residents forming new work patterns and Mission Bay was no exception. Essential workers associated with medical facilities account for an estimated 15 to 20% of our work force and are the majority of daily commuters in this new age. They are also the MB Shuttle's 'core' riders. Mission Bay's residential population remained stable at some 9,600 residents.

UCSF's population of faculty and staff, patients and visitors continued to grow in 2021 as more facilities came online. The impacts of growth are somewhat ameliorated by new work hybrid patterns. UCSF's 2021 Commute Survey estimated that about 39% of personnel telecommuted (as of Fall) and some 60% worked or studied on campus regularly. Post-Pandemic planning offers most UCSF employees the option to work on site and/or remotely and encourages work-from-home when possible.

The Gap, a large employer (with over 1,200 employees) moved out of Mission Bay in December. The Gap/Old Navy is consolidating in its other Downtown offices as a result of post-Pandemic hybrid work schedules.

Transportation Services

SFMTA.

The long-awaited Central Subway has yet to open. Current projections call for it to open in late summer or fall of 2022. This new service has the greatest potential to change travel behavior for Mission Bay employees, residents and visitors with frequent, all-day/evening service running along a dedicated right of way between Mission Bay, Market Street (BART and Muni hubs); Union Square and beyond. The travel time between Mission Bay and these destinations/origins should be shorter; delays due to traffic and construction few; all contributing to greater reliability and flexibility for users.

The #22 bus line which runs from 16th St. BART into the heart of Mission Bay, was one of Muni's 'core' service lines in 2021 and as such, has run throughout the Pandemic.

Caltrain & BART.

Both Caltrain and BART light rail systems greatly reduced the number, size and frequency of trains operating. Both have increased service and/or hours incrementally as ridership begins to pick up, albeit at well below pre-Pandemic levels.

Mission Bay Shuttle.

The majority of riders Mission Bay Shuttle carried in 2021 were essential workers employed by UCSF and Kaiser medical facilities. The first half of the year saw ridership of just over 4,000 boardings per month; it increased each subsequent quarter, ending the year at over 8,000 boardings per month.

Ridership is well below pre-Pandemic levels. In fact, it is at levels not seen since our first two years of operation. At current growth rates, we anticipate it remaining at these levels at least through 2022, if not longer.

Year	Ridership
2021	89,186
2020	117,842
2019	320,947
2018	255,014
2017	320,497
2016	337,520
2015	363,648
2014	388,076
2013	352,890
2012	329,238
2011	220,632
2010	61,073

One of the advantages of fewer people commuting is that we've been able to maintain high frequency of service and offer riders the safety of uncrowded buses. Although masks are still required (and will be encouraged once mandates expire), this should increase the comfort level of riders who are using public transit systems. We also continue to follow enhanced safety and cleaning protocols.

Despite widespread driver shortages plaguing the transportation industry in general and local agencies in particular, MB Shuttle was not forced to cancel any runs in 2021.

SPIN E-Scooters.

SPIN e-scooters has two programs MBTMA helps to promote. The first is a program for low income workers in which they are eligible for free use of SPIN scooters. The second is a program for low income residents which also provides free scooter use. In 2021, citywide, some 2,609 enrolled in the program; of those, there were 1,135 active users and over 75,000 trips taken. The average trip length is 1.32

miles; and the average trip duration is 15.5 minutes. Over 300 applicants from Mission Bay (workers and residents) were received; some 288 were approved for this program.

Peak utilization in the SPIN program was April through August. We are continuing to work with SPIN to promote this program in 2022. Rides are subsidized through SPIN; we provide marketing but no financial assistance.

2021 Survey.

Each year, MBTMA surveys residents and employees about their commute patterns and preferences. As in 2020, the 2021 survey had very low response rates, as most of our community continued to work at home. However, we believe the key highlights outlined below are valid, as they represent overall trends and the 'big picture.'

Key Findings:

- 33% of residents; 29% of employees have moved since the Pandemic began
- 64% of residents; 41% of employees work remotely more than they did pre-Pandemic
- 28% of residents; 47% of employees work on-site 3 or more days per week
- 45% of residents; 62% of employees have changed their commute since pre-Pandemic
- 12% of residents; 17% of employees have changed jobs since the Pandemic
- 10% of residents; 17% of employees have changed their schedules
- Total travel time between home and work is the #1 factor influencing commute decisions for both residents and employees
- Commute times have increased for employees: 47% report commuting to work takes 45 to 60 minutes; 29% spend over an hour commuting to work in the morning
- 52% of employees now live in the East Bay; only 34% live in San Francisco

Mission Bay residents relied on active transportation to get around in 2021, with 26% walking and another 4% biking to work. Another 26% used the MB Shuttle either alone or in conjunction with other transit. Mode share data for employees is skewed as only employees who were commuting to work responded to the 2021 survey. However, over 50% of respondents use the MB Shuttle and/or public transit; 17% walked and 11% carpooled.

Ridehail was not used by either residents or employees in 2021.

Mode Share Detail

Mode	Residents		Employees
Drive Alone	20%		0%
Carpool/get dropped off	4%		11%
Ridehail (Uber-Lyft)	0%		0%
Walk	26%		17%
Bike or Scooter	4%		0%
MB Shuttle Only	8%		0%
MB Shuttle + BART/Caltrain	2%		35%
MB Shuttle + Muni, ferry, other	10%		10%
MB Shuttle + Walk or bike	6%		5%
Public Transit + Walk or bike	2%		17%
Other	2%		0%

TDM Strategies & Measures.

Coordination

- *Develop services, facilities, incentives and policies that make public transit the preferred means of access to Mission Bay*
- *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*
- *Make recommendations for bicycle parking in Mission Bay common areas that is both accessible and efficient.*
- *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*

We work primarily through three avenues to accomplish the above goals. The first is provision of the Mission Bay Shuttle, which provides the essential 'last mile' connection for employees and the 'first mile' connection for residents. We link to Civic Center, Powell, Caltrain, Embarcadero and the Transbay transit hubs.

The second is our website and regular e-communications. The website has thousands of visitors each year (total visits in 2021 were 49,521). People spend over 2 minutes on our website per session. The website is used to communicate not only about shuttle specifics (e.g., schedules, route maps), but provides important updates and links to SFMTA, Caltrain, BART, ride-share and other services. E-

blasts about transportation updates (similar to information posted on the website), are sent to a distribution list of over 350 employees and residents who have signed up for this program.

The third avenue is our participation in community and transportation-related activities. This allows us to share information about transportation-related projects and issues with our local Mission Bay community as well as to provide input on behalf of our local community to SFMTA, Caltrain, SFCTA, and others on proposed transportation and development projects and plans. In 2021, this was limited to participation in CAC meetings and on an advisory sub-committee for the proposed Amazon Fulfillment Center.

In addition, we work closely with new employers moving into Mission Bay to make sure their employees are aware of the shuttle and other alternative choices; we also participate in employer 'wellness' fairs and events which gives us an opportunity to meet with employees to help them plan a better commute, answer questions, conduct mini surveys and gain other valuable customer feedback about our programs and services. No events were held in 2021.

Education, Marketing & Promotion

- *Promote, encourage and facilitate the use of ridesharing, bicycling and walking*
- *Disseminate transit, pedestrian and bicycle route information*
- *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.*
- *Offer Guaranteed Return Trip at no cost if an emergency requires earlier or later departure*

We promote these alternative modes on our website by providing links to various service providers, maps, schedules and special promotions. We also participate on committees purposed with planning transportation service expansions in or near Mission Bay (such as the East Bay Ferry service). By virtue of their location within the Mission Bay Project Area and TMA participation, all employers are automatically enrolled in the City's Guaranteed Ride Home Program.

We also advocate for public policies and programs designed to enhance and expand the transportation network in ways which are equitable, efficient, and practical, as well as build necessary infrastructure for the future.

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.*

Mission Bay TMA does not have the authority to regulate or have a voice in private parking or employers' work scheduling policies. We do share educational material on the benefit of parking management and alternative work schedules.

Annual Survey

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

The results of the 2021 survey are described earlier in this document; this document is also the 2021 Annual Report.

Future Planning

Flexibility will be an important attribute in 2022 and beyond.

If Mission Bay workers continue their outward migration from San Francisco, longer commutes will further incentivize working from home as much as employers will allow. On the other hand, longer commutes may also incentivize using Caltrain and BART when people do come into the office.

Most Mission Bay employers have already implemented hybrid work schedules and are giving employees the option to choose what's best for them at any given time. As evidenced in our 2021 survey as well as in general research both locally and nationally, the hybrid system is here to stay.

Hybrid schedules reduce the number of people commuting to work on a daily basis, which in turn, affects utilization of public transportation – both the frequency of use and times of day.

Increased availability of parking onsite at many companies also may encourage driving for some employees who are commuting to offices. Concerns about safety – both health and security – on public transit, is another important factor in whether commuters will feel comfortable returning to transit. All of these greatly influence demand for shuttle service.

At this point, we believe that the MB Shuttle's current levels of service, frequency and routing, are adequate to serve current and short-term demand.

Three large challenges continue to confront us: a limited ability to fund future growth, the increasing cost of doing business and chronic labor shortages.

As Mission Bay will soon be fully built out, our ability to bring new properties into the TMA to fund our operations is capped. A large portion of the Mission Bay geographic area is UCSF which exempts itself from financial participation while continuing to grow and use our service. Other partners such as CCA and 100 Hooper, pay into our system but also require dedicated service (routes) which do not overlap.

The MBTMA spent over \$100,000 in 2021 for security – a new expense for us. We have recurring issues with overnight and weekend security breaches which mainly come from unsecured Caltrain parcels; the endemic homeless population; and profitability of raw materials found in catalytic converters. New

fencing and overnight security service have made some improvement to these issues, but they continue to be costly and unpredictable. As more of these indirect yet necessary expenses become part of our budget, fewer resources for service improvements and expansions will be available.

The third challenge – the ongoing labor shortage, directly affects the levels of service we will be able to provide. The shortage is caused by a combination of factors including the high rate of older drivers retiring; more stringent requirements to become a licensed commercial driver; tough working conditions (split shifts, exposure to the public, difficult driving conditions); high turnover and high risk. There are no easy fixes or quick resolutions to these challenges.

For more information, please contact:

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