

2020



Mission Bay TMA Annual Report



Mission Bay Transportation
Management Association

5/1/2021

Executive Summary

Only a few parcels and public spaces in Mission Bay were yet to be developed as of the end of 2020. A new K-8 public school is the largest of these future projects; a small footprint commercial office/lab of some 60,000 SF is another. Both will be constructed on Owens Street.

Another handful of parcels will be complete in 2021: a 250-room hotel at the north end of Mission Bay; two office buildings totaling over 400,000 SF adjacent to Chase Center; and UCSF facilities on Illinois St with over 500,000 SF.

Altogether, completion of these pending and planned projects, plus several parks and other public spaces remaining, will mark full buildout of the 300+ acre Mission Bay Project.

Due to reduced business occupancies, closures and construction delays from the 2020 Covid-19 pandemic, the daily employee population of Mission Bay decreased appreciably. Of the approximate 10,000 employees working in non-UCSF commercial properties in Mission Bay, only essential workers were allowed and/or required to work on-site from mid-March through year-end. Essential workers account for an estimated 15 to 20% of this work force. Mission Bay's residential population remained stable at some 9,600 residents.

UCSF 's population, in contrast, did grow in early 2020. Its student population grew from 1,200 to 1,383; the number of faculty and staff grew from 6,700 to 8,771; the patient population increased from 1,575 to over 2,200 per day. Its residential population remains stable at about 1,000. UCSF estimates that from mid-March through December, their daily population decreased significantly as non-essential services were cancelled and fewer faculty, staff, students and patients traveled to Mission Bay on a daily basis. This trend started to reverse towards the end of 2020. However, some 40% of the UCSF work force continued to commute to work each day in essential roles; another 48% worked remotely and on-site in a 'hybrid' model. The drive alone rate for UCSF employees did not change in 2020, as workers continued to use public transit, including MB Shuttle.

Transportation Services

SFMTA.

The long-awaited Central Subway has yet to open. This new service has the greatest potential to change travel behavior for Mission Bay employees, residents and visitors with frequent, all-day/evening weekend 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 and delays due to traffic and construction fewer; all contributing to greater reliability and flexibility for users.

SFMTA reconfigured its 22 Fillmore bus line in 2020 to serve Mission Bay from 16th St. BART. This service replaced the 55 bus route with similar service. Muni limited its bus service to key corridor routes throughout the pandemic.

Muni Metro light rail service was suspended in mid-March. The J, K, and T which serve Mission Bay were all non-operative for the balance of 2020.

Caltrain & BART.

Both Caltrain and BART light rail systems greatly reduced the number and frequency of trains operating from the start of the pandemic through year-end.

Ridership on all of these public transit systems was down by more than 90% as only essential workers commuted on a regular basis and many opted to drive instead of risk exposure to disease on public transit. By year-end, ridership had increased ever-so-slightly on all transit properties.

Mission Bay Shuttle.

2020 began with record ridership. Customers responded immediately to the improved safety at new stops at Civic Center and Powell Stations as well as in more direct, faster routing. Based on the first two months, shuttle ridership would have exceeded our peak years of 2015-2016. Then, in mid-March, Shelter in Place orders were issued. Only essential workers and businesses were allowed and the majority of Mission Bay's normal commuters disappeared.

Year	January Boardings	February Boardings
2015	28,618	28,548
2016	29,242	28,188
2017	26,866	26,588
2018	22,676	20,367
2019	25,624	25,654
2020	33,110	33,425
2021	4,417	4,704

The majority of riders Mission Bay Shuttle carried in 2020 were essential workers employed by UCSF and Kaiser medical facilities. Pre-pandemic, our East and Transbay routes were our highest ridership routes, with close to double the riders of our West route. Since the pandemic, the West route has become the highest ridership route, in line with its service to both medical facilities.

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Ridership By Route Changes 2019-2020						
Month	2019			2020 (Pandemic)		
	East	Transbay	West	East	Transbay	West
October	11,924	11,354	6,204	1,572	1,497	2,236
November	9,629	9,858	4,866	1,368	1,336	2,026
December	7,881	8,360	4,131	1,265	1,031	1,680

Mission Bay Shuttle responded to the pandemic with enhanced safety and bus cleaning protocols, following those adopted by most transit providers. Every other row of passenger seating was blocked off to assure adequate social distancing and mask-wearing on shuttles was mandatory. Initial cutbacks in service were restored in June to ensure adequate capacity for those essential workers using our service. Ridership grew very incrementally beginning in June with 3,529 boardings, reaching a high of 5,639 in October.

SPIN E-Scooters.

Recognizing that many essential workers in Mission Bay have shifts that begin or end at times when the Shuttle or public transportation isn't running, the TMA partnered with SPIN to offer low-income employees free electric scooter rides as an alternative during the pandemic. The program offers unlimited free rides of up to 30 minutes to low-income employees (defined as those earning less than \$50,000/year). MBTMA serves as the liaison for this program, conducting marketing, collecting, and approving applications for enrollment. *To date, all but two of the 24 enrollees are UCSF employees.* Since October, the five most active participants have used their access to e-scooters for some 227 trips totaling 324 miles. The average trip length is 1.6 miles; the average time is about 11 minutes.

2020 Survey

We reconfigured our annual survey in 2020 to gain an understanding of how work and commute patterns changed in 2020. We were curious about the community’s perceptions around using public transit and how their use of transportation services have changed due to the COVID-19 pandemic.

Understandably, response rates were low in both our residential and employee survey groups. However, we feel the responses do reflect ridership trends and our general observations. Based on these, vaccinations and what employers are tentatively planning, we expect ridership to increase only somewhat (10 to 15% over current levels) in 2021. As of this writing, it’s doubtful we will see daily commuters at pre-pandemic levels in the foreseeable future as more people will work remotely either part time or fulltime, and those who do come to a work site may have assigned days and hours.

Residential Responses (44)

Work Location	Before the Pandemic	During the Pandemic
Worked Downtown	37.5%	10%
Worked in Mission Bay	20%	2.5%
Worked in SOMA	2.5%	0%
Worked in Other Parts of SF	10%	7.5%
Worked Outside of SF	7.5%	0%

By spring-summer, 2021, some 13% of residents expect to be working from home more often; 45% expect to be working from home about the same as they currently do; 48% may work from home less often. Some 50% of residents expect to work at a regular work site more often; 20% expect to work at a normal work site less often; 29% expect to work on-site about the same as they currently do.

The survey asked about the use of transit options during the last 3-4 months.

Mode	Haven’t Used	Rarely Used	Use Monthly	Use Weekly
MB Shuttle	59%	9%	15%	15%
Muni	65%	25%	3%	6%
BART	89%	10%	0%	0%
Caltrain	96%	3%	0%	0%
Lyft or Uber	61%	25%	6%	6%

Respondents were also asked about their degree of comfort using various transportation modes.

Mode	Currently		Post Pandemic		
	Would Use	Would Not Use	Would Use	Would Not Use	Not Sure
MB Shuttle	67%	32%	84%	30%	12%
Muni	40%	60%	65%	6%	28%
BART/Caltrain	38%	68%	61%	16%	22%
Lyft or Uber	51%	48%	62%	18%	18%
Shared Bikes, Scooters	29%	70%	30%	53%	15%

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Some 60% of residential respondents own a vehicle, and of those, 52% report they are driving more often than in pre-pandemic times; 40% are driving less often; and 8% are driving about the same.

General comments included:

- The Shuttle is used for more than just work trips
- After vaccinations are widespread, some people will use the shuttle 3-4 times a week
- Riders appreciate the protocols on public transit

Employees (16)

Prior to the pandemic, 87.5% of respondents worked on-site in Mission Bay and 12.5% worked a hybrid (some time in the office, some time at home). Since the pandemic, 37.5% still report to work in Mission Bay daily; 12.5% work on-site once or twice a week; and 37.5% are working from home. Over 6% are no longer employed; another 6.2% work a different 'hybrid' schedule. This unemployed correlates to the 6.8% Bay Area-wide unemployment rate.

Asked about the future, 50% of respondents expect to continue their current patterns indefinitely; 10% expect to work remotely more often; and 40% expect to work from home a little less often.

Employees were also asked how comfortable they will be using various transportation modes post-pandemic.

Mode	Would Use	Would Not Use	Not sure
MB Shuttle	80%	20%	0%
Muni	53%	7%	38%
BART/Caltrain	53%	0%	46%
Lyft or Uber	57%	7%	35%
Shared Bikes, Scooters	28%	21%	50%

56% of employee respondents own a vehicle. Of those, 33% are driving more than they did before the pandemic; 44% are driving less, and 22% are driving about the same. Some 25% are driving to work more often; 37% less often and another 37% are driving to work at the same level as pre-pandemic.

Comments included looking forward to post-pandemic times and eventually using the shuttle and other transit once or twice a week.

TDM Strategies & Measures

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.

Coordination Strategies & Measures

- *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 the provision of the Mission Bay Shuttle, which provides the essential 'last mile' connection for employees and the 'first mile' connection for residents.

The second avenue is our website, which has thousands of visitors each year. Even in the 'down' year of 2020, we had over 24,000 users who averaged nearly 2.5 minutes per visit on our site. 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.

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 both proposed transportation and development projects and plans. 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 fairs and events which gives us an opportunity to meet directly with employees to help them plan a

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better commute, answer questions, conduct mini surveys and gain other valuable customer feedback about our programs and services.

Education, Marketing & Promotion Strategies

- *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 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 information that educates them 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 2020-21 survey are described earlier in this document; this also serves as the 2020 Annual Report.

Future Planning

As of this writing (spring, 2021) much is still uncertain. The pandemic is still very much present, although vaccinations are now available and over the next three months, most people who want the vaccine, should be able to get it. California just announced it will ease most restrictions in mid-June.

This downturn is unlike any previous one. According to the Bay Area Council's Economic Institute, the Bay Area lost over 425,000 jobs in the past year and sectors such as leisure and hospitality are down over 48%. Most other sectors have dropped to 2015-2016 employment levels. Overall, the unemployment rate in the Bay Area of 6.8% is double what it was pre-pandemic and the labor force shrank over 6% in the past year.

There is an exodus from San Francisco to other parts of the Bay Area and California where homes are more affordable and spacious. The rental housing market in San Francisco has all but collapsed with rents down by as much as 30% and landlords offering incentives of free rent for multiple months.

Employers are tentatively making plans for some employees to return to work between June and the end of the year, although no one expects to bring back 100% of their employees. The pandemic accelerated trends such as WFH (work from home) and many companies will implement hybrid work schedules where employees rotate days on site to control densities in the workplace. Many companies, particularly in the tech sector, have adopted a permanent WFH structure for those who want it.

While no one yet knows what the future looks like, we do know it will be quite different than at any time in the past.

- Will workers return to the office more than occasionally (especially now that their commutes are much longer)?
- Will employees (and residents) feel comfortable riding transit in close proximity with other strangers? Will they feel comfortable on transit for longer commutes?
- Will they be willing to be in crowded conditions such as bars and restaurants and indoor entertainment venues?
- Will they be willing to work alongside people not in their 'bubbles' or who are not vaccinated?
- To what extent will education be 'by zoom' instead of in-person? How will work, classrooms, dining and other spaces be reconfigured to provide comfortable, safe 'distancing' and will these be lasting or temporary? What new norms will evolve and how, in particular, will these changes impact women in the workforce, who to date, have been the most adversely affected?
- Will employers mandate vaccinations for those working on site?

If current shuttle ridership trends offer a glimpse of the future, we would speculate that for the remainder of 2021, only a handful of people who are not essential workers will return to a daily schedule. The pre-pandemic WFH rate in Mission Bay has held at 25-28% for the past few years; all indicators point to a 35-45% WFH rate in the future, and perhaps even higher. Based on what we know today, we don't believe peak hour commuting will return to pre-pandemic levels anytime soon, if ever.

The sheer volume of unknowns is unprecedented. This represents a tremendous challenge as we plan for the future.

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Mission Bay Shuttle's key constraint in the near-term is social distancing on vehicles. With this requirement, our capacity is 10-12 passengers per vehicle, as opposed to our capacity of 30+ under normal operating conditions. We have met this challenge by running 'full service' – all of our buses – and have thus far been able to maintain social distancing. As more people are vaccinated, we are hopeful that 3 feet can become the next interim step, with people who know each other and are willing, sitting side by side.

Operations for 2020 and 2021 is an expense spread over a relatively few riders, and disproportionately benefitting only a few employers/property owners (Kaiser and UCSF). Most other businesses in Mission Bay such as the GSW Arena, The Gap, Nektar and other offices are either closed or limited to a small number (less than 20%) of their normal work force. Further exacerbating this imbalance is that the largest health care provider, UCSF, does not contribute to the Shuttle despite the fact that even in normal times, UCSF employees make up over 30% of shuttle riders. This is not sustainable.

Even if up to 50% of employees eventually return to working onsite daily, our cost-per-passenger will have risen exponentially. Our ability to raise new revenues are also reaching a limit, as Mission Bay is all but built out, and the only new developments which will further strain our resources (UCSF and the Giants) are exempt from participation in the TMA. Equally concerning is what level of service and budgetary constraints our existing base of employers and residents will expect in an uncertain economy in the coming years.

These challenges are daunting, yet they also offer a rare opportunity for public and private transit and other vendors to work together in new, creative ways to form seamless networks that are flexible, and affordable. New cooperative and mutually supportive partnerships can provide our communities with new levels of coverage and equity that help us achieve the important shared goals of reduced congestion, safe streets, a spectrum of efficient transportation options and environmental benefits.

For more information:

Luke Stewart
President, Mission Bay TMA Board of Directors
lstewart@mbaydevelopment.com