

2022 Annual Report

April 2023



MISSION BAY TMA
Mission Bay Transportation Management Association

Executive Summary

2022 marked the first year of what may be the ‘new normal’ in terms of how employees have reconfigured their work schedules and commute patterns. In a nutshell, we are seeing a shorter work week and fewer people coming to work sites overall.

Most companies continued a combination of WFH and in-office (for other than essential workers); non-essential workers continued to work from home at least three days a week. This pattern is seen regardless of the type of business: office, lab, medical, etc., and is also the trend throughout the Bay Area. Tuesday through Thursday are the days with the most employees on-site; Fridays have the lowest number of on-site workers; Mondays have only slightly more workers on-site than on Fridays. The average on-site workforce is at about 40-50% of pre-pandemic levels during mid-weekdays; even less on Mondays and Fridays.

Several Mission Bay employers are projecting an incremental increase in employees returning to work sites in the first quarter of 2023; but Work From Home, at least part time, is expected to continue for those whose jobs can be done remotely.

The only new buildings to come online in 2022 were UCSF properties. This entity now has a total Mission Bay population of 15,235, including students, faculty, staff, visitors, and residents.

Just 60% of UCSF’s Mission Bay employee population of 12,400 is on-site on its busiest days (Tuesday through Thursday). This is some 1,300 fewer people on those days than pre-pandemic.

One large property at 550 Terry Francois Blvd, the former headquarters for The Gap/Old Navy which once housed some 1,200 office workers, was vacant for all of 2022, and is not expected to be re-occupied until 2024. No other significant changes occurred in other Mission Bay commercial buildings.

The residential population remained stable at some 9,600 residents.

Mission Bay will be fully built-out upon completion of a small office/lab facility at 1450 Owens Street and construction of the public elementary school which has yet to start construction.

Security issues continue to loom large and cause operational impacts (due to broken windows and theft which take buses out of service for multiple days).

Riders overall are happy with our service and supportive of the Mission Bay Shuttle. Employees and residents continue to request additional services at midday, weekends, early morning, and stops at additional transit stations.

Transportation Services

SFMTA

The Central Subway, SFMTA’s new direct connection between Mission Bay and Chinatown, officially opened in January 2023. Ridership was low in its first two months of operation with some 3,200 boardings in January and just 2,966 in February. The Union Square station, which is also Central

Subway's connection to the Powell Street Station, totaled a little less than half of all entries and about two-thirds of all exits from the new system. There was a slight increase in overall T Line ridership attributed to the subway and changes which improved connectivity between BART, Downtown Muni Metro, Caltrain and Mission Bay. At this early date, the significant decreases in travel time projected between Mission Bay and the Union Square station on the Central Subway have not been achieved. These changes have not had a discernible effect on utilization of the Mission Bay Shuttle.

Overall, while SFMTA has regained 55% of pre-pandemic ridership, use of SFMTA in Downtown San Francisco is much lower than in other parts of the city. While many main routes have been restored to partial or full pre-pandemic levels, others were re-routed and schedules were adjusted as a result of 2021 public feedback and budget shortfalls. There are plans to restore the suspended 10 Townsend with a route further from Mission Bay which would make this connection negligible for our community.

Caltrain & BART

Ridership on both Caltrain and BART remains far below pre-pandemic levels. BART is at 33% of its pre-pandemic boardings; Caltrain is at 26%.

Caltrain postponed planned fare increases in 2022 and offered a new low-income rider discount program through Clipper's START platform to incentivize people returning to the light rail service. However, it should be noted that ridership had begun to decrease slightly even before the pandemic; ridership was 2.3% less in 2019 than it was in 2018. Caltrain attributed this loss to overcrowded trains and the lack of first/last mile shuttles at several Peninsula rail stations. The transit operator also allowed corporate GoPass subscribers to donate their unused annual passes to non-profits and other programs serving low-income and otherwise underserved communities as part of its focus on equity and access.

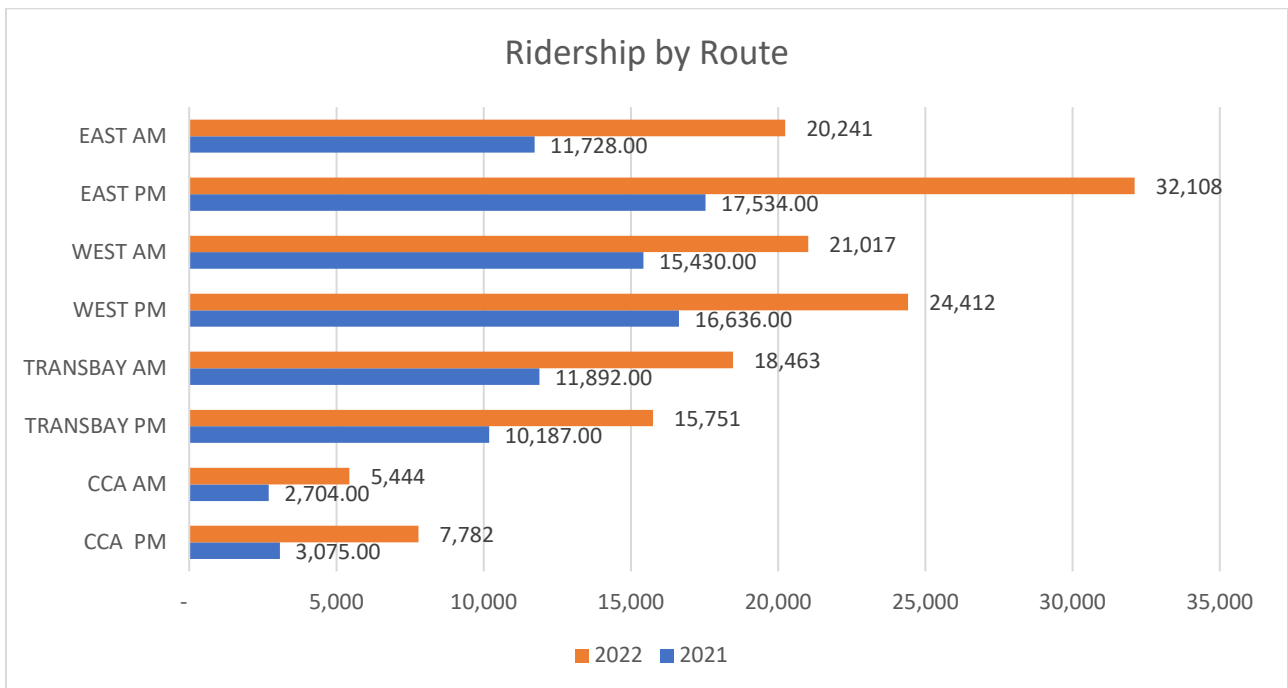
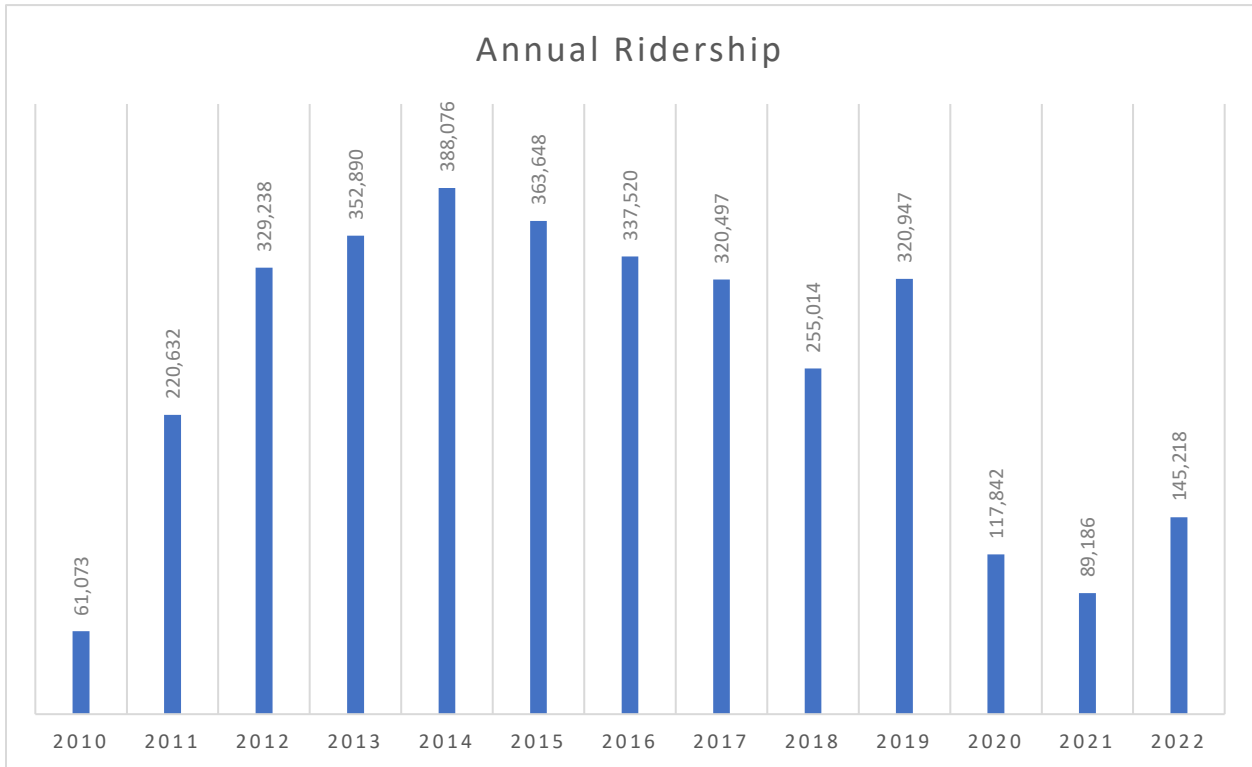
Caltrain has developed four possible service scenarios for 2023-2028 ranging from full recovery to lower ridership on a more permanent basis. All scenarios factor in electrification, which will launch in 2024 and increase frequency and speeds.

BART has finally acknowledged that ridership has dropped precipitously not only due to fewer employees commuting on a daily basis, but to concerns about safety and cleanliness both in stations and on BART trains. Violent crime increased by 115% over the last five years. The transit operator just increased cleaning and police presence at Downtown stations and on trains, as of March 2023.

BART is looking at innovative ways of bringing riders in (for example, making BART stations 'destinations'). It recognizes that in addition to offering riders safe, clean trains and stations, and on-time performance, the overall experience of using BART must be positive in order for people to use it. Caltrain is considering 'non-traditional funding' as a possible strategy (such as advertising and naming rights). Both are experiencing more traffic on weekends and are trying to respond to midday demand to make their properties more viable and inclusive for all.

Mission Bay Shuttle

Essential workers continue to be our core riders since the beginning of the pandemic. General ridership increased incrementally over the year as more workers returned to the office and more patrons returned to events at Chase Center and other Mission Bay venues. Total ridership increased 59% over 2021.



Capacity on the Mission Bay Shuttle is still low; limited by reduced ridership on BART, Caltrain and other transit that feeds riders to our shuttle. Riders feel safe on the shuttle but have major concerns with safety on BART. Masks are no longer required on our shuttles but are encouraged and we continue to follow enhanced safety and cleaning protocols.

Despite continuing driver shortages in the transportation industry in general and local agencies in particular, MB Shuttle was not forced to cancel any runs in 2022.

SPIN E-Scooters

SPIN 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. Spin reduced its employee subsidy in 2022 due to theft/vandalism and pass misuse. We are continuing to work with SPIN to promote this program in 2023. Rides are subsidized through SPIN; the Mission Bay TMA provides marketing but no financial assistance.

2022 Survey

The Mission Bay TMA’s annual survey of employees and residents was conducted in March of 2023. The response rate remains lower than pre-pandemic surveys but substantially higher than our 2021 survey: Approximately 100 employees and 70 residents completed the online survey.

Survey Response Rates

Year	Employee	Residential
2022/2023 (March 2023)	100	70
2021	17	53
2020/2021	15	40
2019/2020	324	90

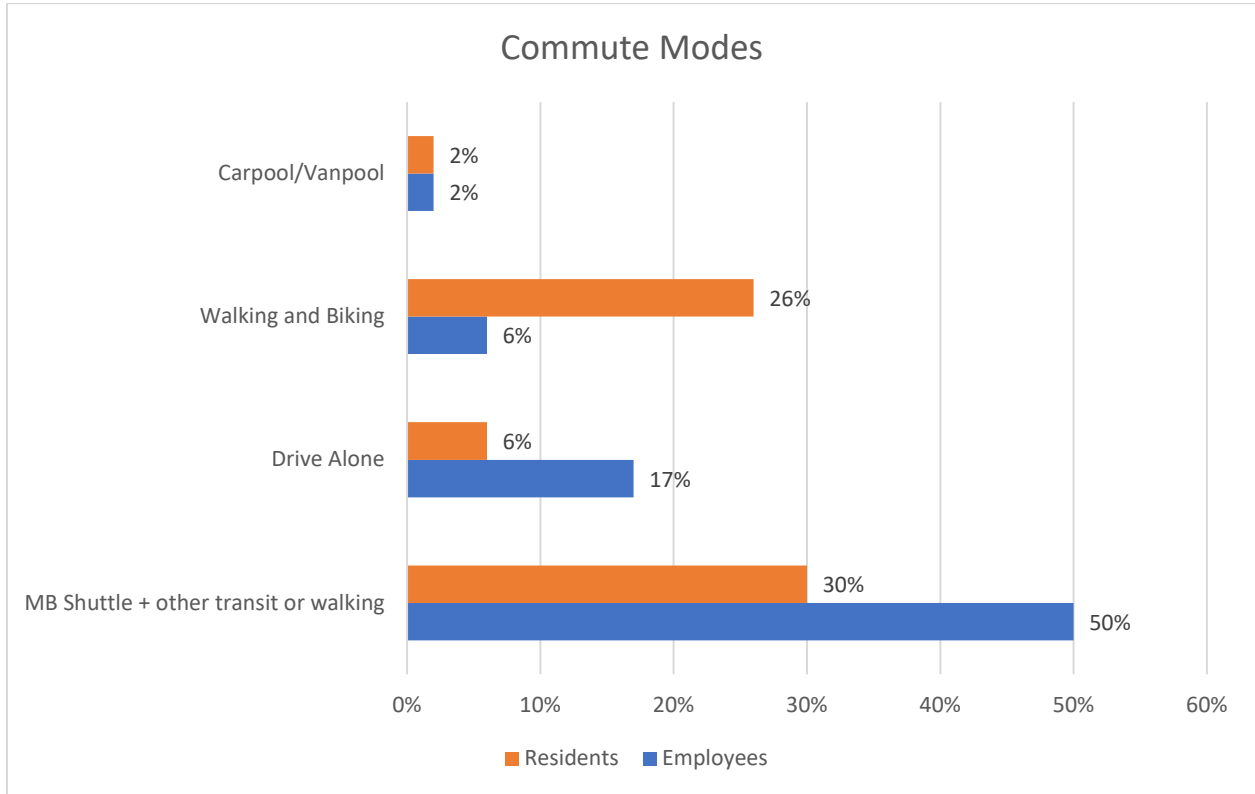
Key findings in the 2023 survey reflect the return to workplace, changing commute habits, and a large population of new employees in Mission Bay.

Highlights of the survey include:

- 66% of employees work on-site three or more days a week (up from 47% in 2021)
- 51% of employees have a commute to work of an hour or more (up from 29% in 2021)
- 90% of employees are commuting to work in peak morning hours (7am-10am)
- 42% of employees are leaving work before 5pm
- 32% of employees didn’t work in Mission Bay before the pandemic
- 21% of employees have a longer commute than pre-pandemic
- 32% of employees live in San Francisco (down from 34% in 2021)
- 55% of residents work from home at least part time
- 11% of residents have retired and another 6% changed jobs in the last 2 years

Commute Modes:

Despite decreases in the use of public transit, the drive alone rate in Mission Bay remains relatively low at 17% for employees and just 6% for residents. The chart below shows survey respondents’ overall mode-share:



Mode Share Detail:

Mode	Residents	Employees
Drive Alone	6%	17%
Carpool/Get Dropped Off	2%	2%
Ridehail (Uber-Lyft)	0%	1%
Walk	21%	3%
Bike or Scooter	5%	3%
MB Shuttle Only	10%	4%
MB Shuttle + Muni, Ferry, Other Transit	2%	25%
MB Shuttle + Walk or Bike	5%	4%
MUNI + MB Shuttle	13%	17%
Public Transit + Walk or Bike	13%	22%
Other Shuttle (UCSF)	8%	2%
Other (don't work, WFH, etc.)	16%	

Drive Alone Commuters by Origin

Mode	San Francisco*	East Bay	San Mateo	Santa Clara	Outside of Bay Area
Drive alone (17% of total survey respondents)	29%	35%	24%	6%	6%

*San Francisco excluding Mission Bay

Safety at transit stations and on public transit remain the most important consideration for employees and residents alike in choosing how to commute to work, with 92% of employees and 86% of residents saying this factor is either 'very' or 'extremely' important.

Total travel time between home and work is equally important, with 91% of employees and 92% of residents citing it as either 'very' or 'extremely' important.

Availability and the cost of parking and driving are of lesser significance to both employees and residents. Some 94% of employees who drive park at their workplace; only 6% park on the street.

Website Analytics

Our website traffic historically correlates to annual ridership numbers. Since the drop in both from the pandemic, traffic has started to climb again to 92,124 visitors in 2022, an 86% increase from 2021. This is still 30% below pre-pandemic website traffic.

Mobile usage continues to grow. As we update our website, mobile friendly features continue to be a priority, as well as pushing information to Google maps and other transit apps.

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.

1. 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.
2. The second is our website and regular e-communications. The website has thousands of visitors each year (total visits in 2022 were 92,124). People spend over two 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 300 employees and residents who have signed up for this program. We also communicate updates through social media channels and our DoubleMap GPS system. We recently posted QR codes on the shuttles which riders can utilize to see our other routes and link directly to our Lost & Found.
3. 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 2022, this was limited to participation in CAC meetings and serving 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. We attended two events in 2022.

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 2022 survey are described earlier in this document; this document is also the 2022 Annual Report.

Future Planning

Adjusting to new ridership levels and commute schedules will be important over the next few years. The trend of Mission Bay workers moving out of San Francisco which began several years ago, has continued. Commute times and distances have lengthened, which both discourages workers coming into Mission Bay on a daily basis while, on the other hand, may encourage use of public transportation and the Mission Bay Shuttle, if it is safe, pleasant, and faster than driving.

Whether transit will reach pre-pandemic levels in the short term remains an open question. We're servicing a smaller pool of riders as a result of WFH schedules and will need to monitor rider schedules and optimize our routes as community habits change. There is continuing interest from our community in midday and weekend service. We continue to monitor demand for these and explore the feasibility of such service. We are fully aware of the importance of first-and-last-mile shuttle connections for people using broader public transportation services and of increasing interest in non-peak hour service.

There will also be a need to monitor levels of service of regional and local transit as they evolve in response to financial and operational challenges as well as to new commuter demand to be sure we are servicing connecting trips for riders. We will also continue to focus on digital marketing and information

to make sure riders have access to real time information through the digital channels they use, to facilitate connections.

As part of the larger transit community, and on the crucial need for us to connect to larger transit efficiently to best serve our mutual riders, we are open to partnering and participating in creative ways to bring ridership back to all transit.

Significant ongoing investments in security will impact our resources for service improvements and expansion, particularly because Mission Bay is reaching full buildout and therefore, potential new revenues to the Mission Bay TMA will soon be capped.

We currently provide service to both CCA and Adobe which are adjacent to Mission Bay and are continuing to pursue other opportunities outside of Mission Bay with the possibility of adding routes and/or stops in ways that enhance existing services as well as provide new service and revenues.

For more information, please contact:

Luke Stewart, MBTMA Board President
lstewart@mbaydevelopment.com