

2023 Annual Report

April 2024



MISSION BAY TMA
Mission Bay Transportation Management Association

Executive Summary

Although 2023 saw an increase in work from home (WFH) and flexible schedules for Mission Bay employees, there is too much unknown to call it a new normal. While ridership increased to over 65% of pre-pandemic levels, commutes are uneven across weekdays and hours. Many employees have schedules that change from week-to-week.

The commuter drive alone rate (SOV) increased from 17% in 2022 to 33%, according to our 2023 commuter survey. More employees work onsite Tuesday through Thursday, which is in keeping with Bay Area-wide trends. Commuters are arriving at work later and leaving earlier. Some companies are 100% WFH and are subleasing space.

Mission Bay residents who commute also report commuting more often on Tuesday through Thursday than on Mondays and Fridays.

Mission Bay will be fully built-out upon completion of a small office/lab facility at 1450 Owens Street and a public elementary school, both projected to open in 2025 or shortly thereafter. Phase 1 of the Mission Rock Development, a new mixed-used development in China Basin, is scheduled for completion in 2024, creating over 500,000 sf of commercial space and over 500 residential units. The development will provide a total of 1.6MM sf of commercial space and 1,100 residential units when all phases are completed.

The residential population remains stable at approximately 10,000 residents.

Security issues in the yard improved in 2023, with no reports of vandalism after new lighting was installed and an overnight security service was retained.

Overall riders are happy with service and supportive of the Mission Bay Shuttle. We are noticing a micro community of shuttle riders who feel that the shuttle experience is an important part of their day due to meaningful daily interactions with our drivers.

Employees and residents continue to request additional services at midday, on weekends, earlier morning and later at night, and stops at additional transit stations and at points outside of but near our service area. Most of these are low-volume types of services which would likely not be implemented without significant new funding partnerships.

Transportation Services

Many public transit agencies have focused on safety, cleanliness and improving rider experience in 2023, along with reducing or reconfiguring services to meet increased costs.

There is an effort to integrate the rider experience across transit providers in the Bay Area for better wayfinding, closer fare coordination, aligning transit schedules, and free or discounted transfers between systems with the next generation of Clipper.

SFMTA

SFMTA has focused on connecting neighborhoods and rearranging service to match travel patterns, focusing on making transit “fast frequent reliable clean and safe.”

Bus and rail ridership on MUNI rose 25% in 2023 compared with 2022, to 433,000 riders and recovered 68% of pre-pandemic weekday ridership. Five bus lines exceed 100% of pre-pandemic levels. Downtown recovery remains a challenge. Ridership has returned faster on corridors that are part of the Muni Forward program.

Caltrain & BART

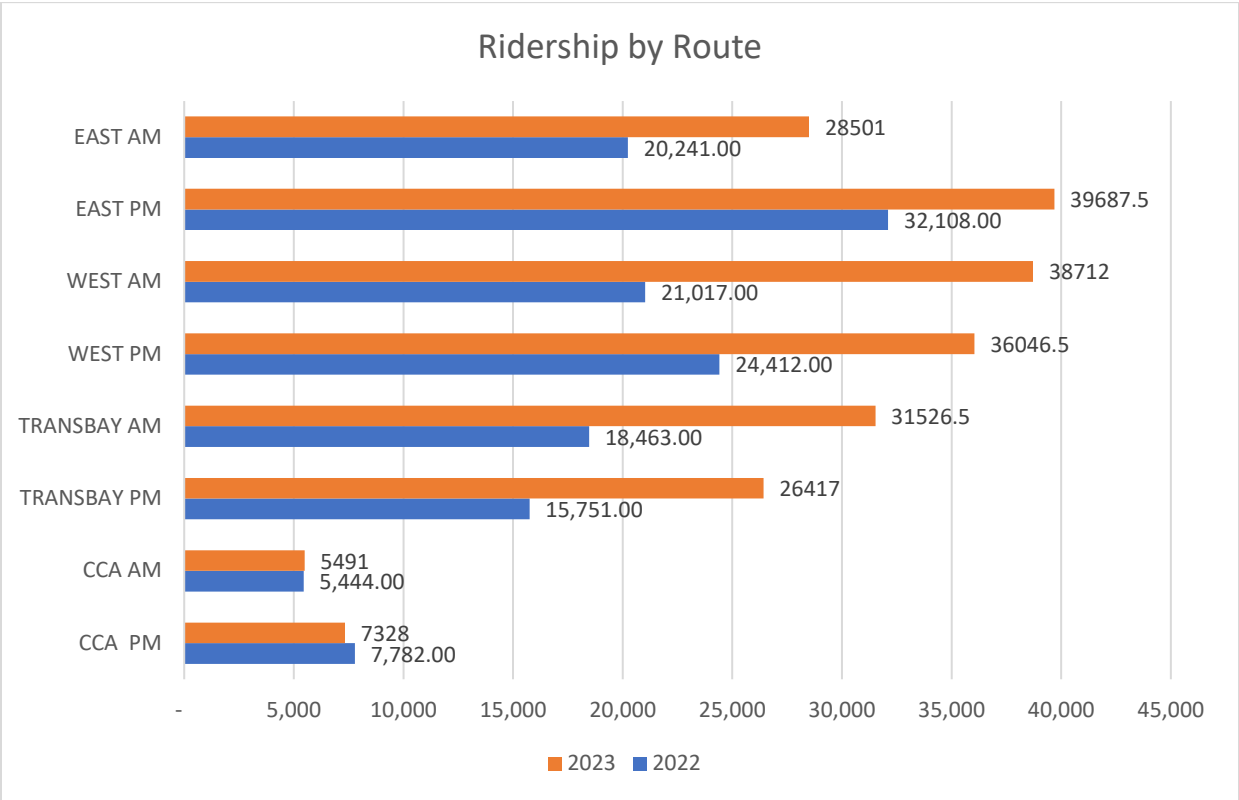
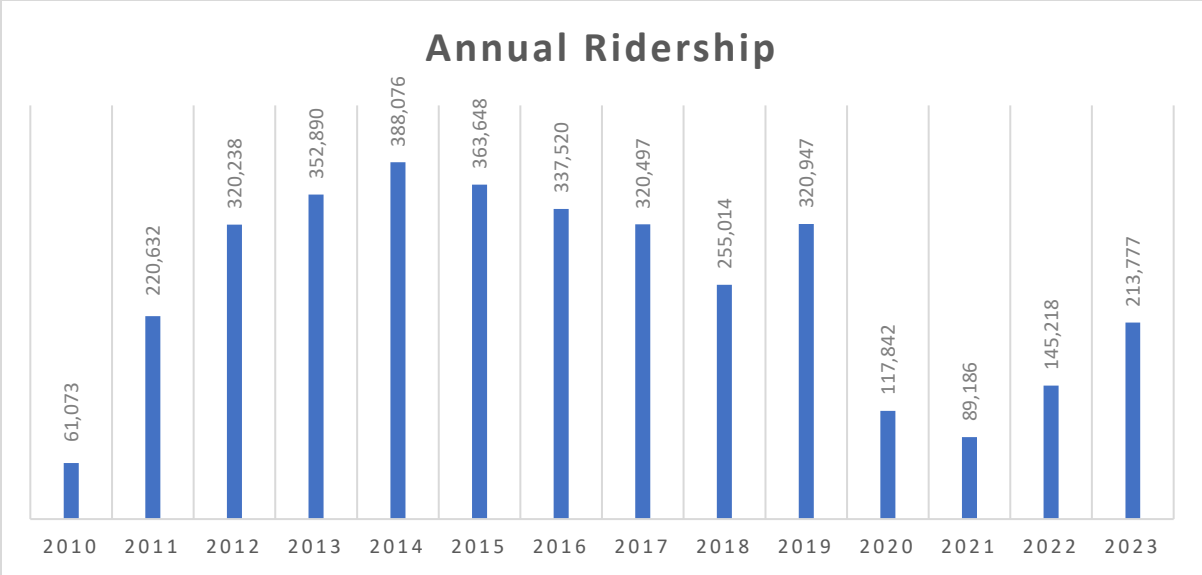
BART turned its focus to quality of service in late 2023, running new trains for their base schedule, and increasing focus on cleanliness and safety. Modernization efforts continue with the installation of new escalators in downtown San Francisco, new fare gates, and adding more new trains into service.

In response to remote work trends, BART has evened out frequency of trains throughout the day and evening and increased service on nights and weekends where ridership is growing at a faster rate. 2023 Ridership peaked at 43% of pre-pandemic levels.

In 2023, Caltrain completed critical steps in the Caltrain Electrification project. Electrified service is scheduled to begin in the Fall and will result in faster and expanded levels of service for riders in addition to much-needed improvements to infrastructure.

Mission Bay Shuttle

General ridership continued to increase as more workers returned to the office and more people are traveling in general, and to events at Chase Center and other Mission Bay venues. Total ridership on the Shuttle increased 47% over 2022. We carried 213,777 people in 2023, 30% less than 2019 pre-Covid levels.



The Mission Bay Shuttle buses currently have capacity on all routes. Riders feel safe on the shuttle but continue to have concerns about waiting at transit stops. 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 2023. Our most senior driver is reaching a 14-year anniversary in 2024 and 40% have been with the Mission Bay Shuttle over 7 years.

2023 Survey

The Mission Bay TMA’s annual survey of employees and residents was conducted in early 2024. The overall response rate remains lower than pre-pandemic surveys but was higher than in the last two years. Approximately 314 employees and 69 residents completed the online survey.

Survey Response Rates

Survey Year	Employee	Residential
2023	314	69
2022	100	70
2021	17	53
2020	15	40
2019	324	90

Key findings

Employee Respondents:

Commute mode split:

- The commuter drive alone rate increased from 17% in 2022 to 33%.
- Active modes (walking, biking and scooters) increased from 3% to 13%.
- 41% of respondents take the MB shuttle in conjunction with other transit.
- 1% of respondents used Rideshare.
- 2% of respondents carpooled or got dropped off.
- Overall, SOV respondents ranked travel time and too many transfers as the primary reason for driving alone (44%); followed by an irregular work schedule (16%) and safety (11%). The cost of public transit was also a concern (10%).

Employee perceptions about public transit safety and reliability:

- 19% of people who drive alone say that safety is the primary factor in their decision to do so.
- Respondents felt less safe waiting at transit stops or stations (23%) than on public transit (15%).
- 12% of respondents have not used either MUNI, BART, Caltrain or buses in the last year.
- Of respondents who have used BART recently, 41% are not sure if they’ve experienced an improvement since BART increased its safety program. 18% say they have not noticed an improvement.
- Overall, respondents felt that public transit is reliable. Less than 25% felt that it wasn’t, with only 14% of people who drive alone citing reliability as the primary reason they drive.

Work schedules:

- A higher number of respondents work on site Tuesday through Thursday (70-76%) than Monday (49%) and Friday (50%), in a typical work week.
- More respondents work remotely Monday (32%) and Friday (37%) than Tuesday through Thursday (11-17%).

Drive alone commuters by origin*:

- Respondents who live 5 miles or less have the lowest drive alone rate (27%) and the highest bike (13%) and walk (18%) rates. They are also the heaviest users of Muni and other bus lines and the least likely to use BART or Caltrain. This group is more likely to work on-site (all days) of the week.
- Respondents who live 6-25 miles away have the highest drive alone rate (41%). Biking is just 4%. 25% use BART; only 3% use Caltrain.
- Respondents who live 26 miles or further have a drive alone rate of 30%, which is just slightly higher than those living within a 5-mile range. 70% are using some form of shared transportation (transit or carpools and vanpools). 41% use BART; 21% use Caltrain.

Residential Respondents:

- The drive alone rate increased from 6% to 14%.
- A higher number of respondents report commuting outside of Mission Bay on Tuesday through Thursday than on Monday and Friday.
- 41% walk or bike when traveling within Mission Bay.
- When traveling within Mission Bay for non-commute business, over 30% travel between 9 and 11am.
- 14% commute to work using transit, 14% using only the MB Shuttle, and 23% used an active mode and/or the MB Shuttle.
- 1% used public transit combined with walking or biking, down from 13% in 2022.

Mode Share Detail:

Mode	Residents 2022	Residents 2023	Employees 2022	Employees 2023
Drive Alone	6%	14%	17%	33%
Carpool/Get Dropped Off	2%	3%	2%	1%
Ridehail (Uber-Lyft)	0%	7%	1%	1%
Walk	21%	13%	3%	8%
Bike or Scooter	5%	4%	3%	7%
MB Shuttle Only	10%	14%	4%	

MB Shuttle + Muni, Ferry, Other Transit	2%		25%	31%
MB Shuttle + Walk or Bike	5%	10%	4%	1%
MUNI + MB Shuttle	13%	14%	17%	10%
Public Transit + Walk or Bike	13%	1%	22%	2%
Other Shuttle (UCSF)	8%	3%	2%	2%*
Other (don't work, WFH, etc.)	16%	14%		

*Survey excludes UCSF employees

Website Analytics

54K users visited 273K pages on the Mission Bay TMA website in 2023. Users, visits and time on page all increased 30% over the last year, and social referrals to the site increased by 100%. Our subscriber list more than doubled.

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 2023 were 54,000). People spend over one minute 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 400 employees and residents who have signed up for this program. We also communicate updates through social media channels and our Trakk GPS system. We post 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 2023, this was limited to participation in CAC meetings, meeting with SFCTA's Business Roundtable and the planning efforts for the new Mission Bay School.

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 one employee benefits event in 2023.

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.*

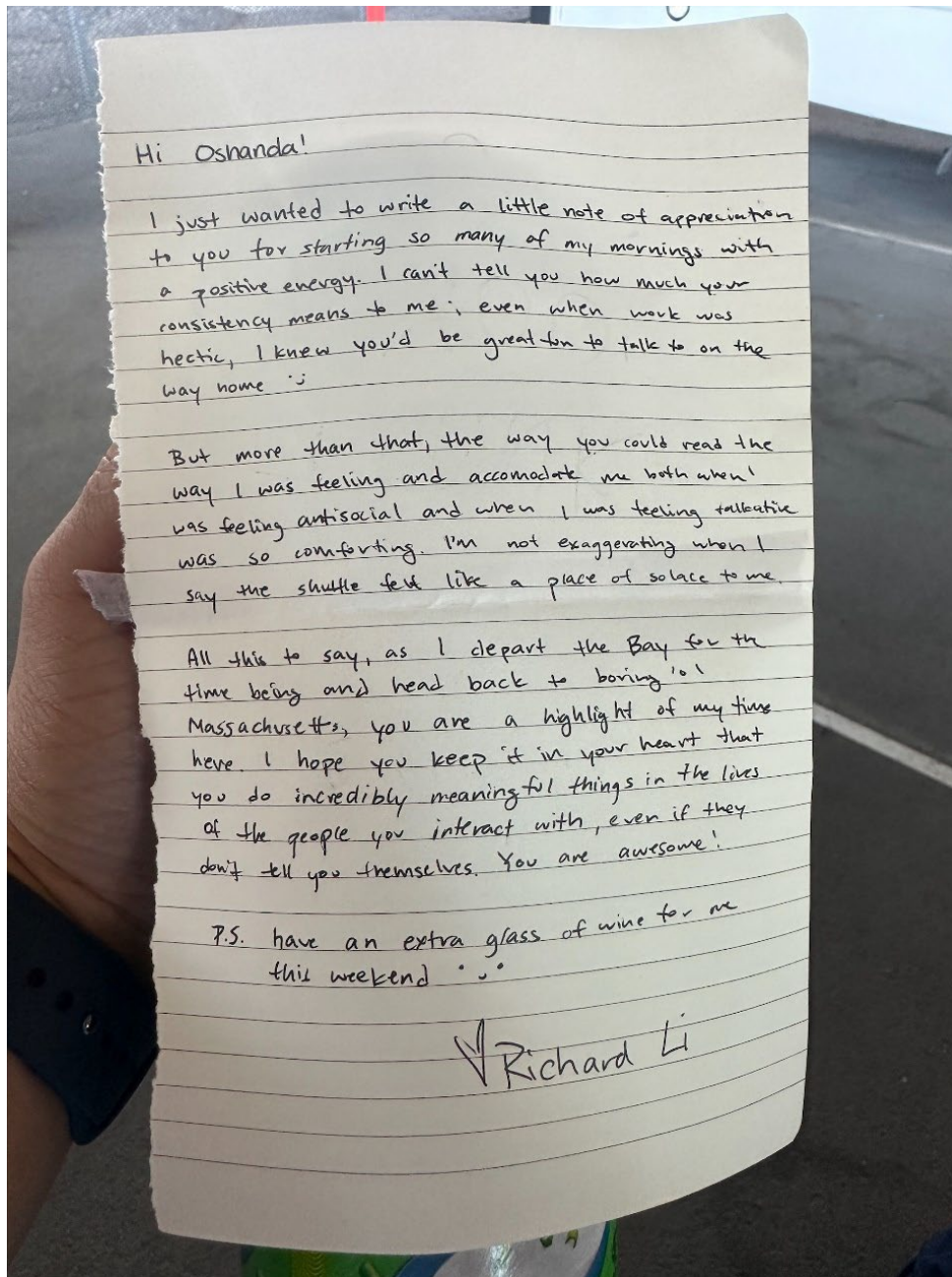
The results of the 2023 survey are described earlier in this document; this document is also the 2023 Annual Report.

Future Planning

Now that Mission Bay is at full build-out, we're working on a new 5-Year Strategic Plan. The Plan will evaluate if and how services may be reconfigured to align with emerging trends and available resources.

Testimonials

The MB Shuttle receives testimonials and feedback throughout the year that points to a spirit of community between drivers and passengers. Here is one example:



Hi Oshanda!

I just wanted to write a little note of appreciation to you for starting so many of my mornings with a positive energy. I can't tell you how much your consistency means to me; even when work was hectic, I knew you'd be great to talk to on the way home :)

But more than that, the way you could read the way I was feeling and accommodate me both when I was feeling antisocial and when I was feeling talkative was so comforting. I'm not exaggerating when I say the shuttle felt like a place of solace to me.

All this to say, as I depart the Bay for the time being and head back to boring 'ol Massachusetts, you are a highlight of my time here. I hope you keep it in your heart that you do incredibly meaningful things in the lives of the people you interact with, even if they don't tell you themselves. You are awesome!

P.S. have an extra glass of wine for me this weekend :)

Richard Li

For more information, please contact:

Luke Stewart, MBTMA Board President
lstewart@mbaydevelopment.com