

MEMORANDUM

January 7, 2016

TO: MEMBERS, PORT COMMISSION
Hon. Leslie Katz, President
Hon. Willie Adams, Vice President
Hon. Kimberly Brandon
Hon. Doreen Woo Ho

FROM: Monique Moyer
Executive Director

SUBJECT: Informational presentation on the Port Northern Waterfront Transportation Survey

DIRECTOR'S RECOMMENDATION: Information Only

Summary

The Port and City are dedicating substantial effort to planning for and improving transportation services on the east side of the City, including along the Port waterfront. Most of the City's projected growth in jobs and residents is targeted in South of Market, Mission Bay, and southeast part of San Francisco. At its meeting on January 12, 2016, the Port Commission will receive an informational presentation on the Waterfront Transportation Assessment, an interagency effort led by the San Francisco Municipal Transportation Agency (SFMTA). The Port participated in the Waterfront Transportation Assessment and also initiated a survey of Port tenant businesses along the Northern Waterfront, between Fisherman's Wharf and AT&T Ballpark, regarding transportation needs, operations and observations along The Embarcadero corridor, including Jefferson Street in Fisherman's Wharf. Seifel Consulting, Inc., together with transportation consultant, Nelson Nygaard Associates, and D&A Communications conducted a survey from late September through October 2015. Port staff and consultants will provide an informational presentation about the responses and initial analysis at the January 12, 2016 Port Commission meeting.

Port Northern Waterfront Transportation Survey

In coordination with City transportation planning efforts led by SFMTA, including the Waterfront Transportation Assessment, the Port wanted to ensure the inclusion of Port

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tenant business perspectives about transportation needs and ideas along the Embarcadero corridor, including Fisherman's Wharf. Most of the City's projected growth in jobs and residents are being directed to the South of Market, Mission Bay, and southeast area of San Francisco, and thus the City is investing much effort to plan for transportation improvements in those locations. However, there is also awareness about the need to improve transportation access and services along the northern portion of the Port waterfront as well. As documented in its comprehensive review of changes at the Port, the Embarcadero has become a major destination, attracting over 24 million people in 2013. The Port works actively with SFMTA and the City family to manage and improve traffic circulation, water transportation services, public transit, bicycle and pedestrian access and amenities, but recognizes that more transportation improvements are needed.

The Port hired Seifel Consulting, Inc., which led a team including Nelson Nygaard Associates transportation consultant, and D&A Communications to carry out a Northern Waterfront Transportation Survey ("Survey"). The Survey was offered to 266 Port tenant businesses and key stakeholders in Port facilities from Fisherman's Wharf to AT&T Ballpark via email and through targeted interviews, some of which are still underway. Some Port tenants in southern facilities who found out about the Survey also opted to submit Survey responses.

The Survey was administered via email distribution and has been completed. Some of the interviews are still outstanding and expected to be completed in January. Attachment 1 presents the questions included in the survey. Attachment 2 provides a summary of survey responses received to date, which will be refined as needed once the interviews have been completed. The survey provided opportunities for respondents to provide open-ended comments and thoughts, which are presented in the Respondents' Verbatim Comments presented in Attachment 3.

The Port was pleased at the high response rate of over 40%, representing 113 tenant businesses, including 10 of 16 priority tenants identified by the Port. Over 70% of the responses were from Port tenants of 10 years or longer, indicating that many longstanding businesses are very interested in providing input on transportation conditions and issues of concern. The Survey was anonymous but structured to define participation in these geographic areas: Fisherman's Wharf, Northeast Waterfront, Ferry Building, South Beach, and Other. The Survey was distributed to a wide array of businesses, including maritime industry, light industrial, office, retail, restaurant and entertainment/assembly tenants. The Survey included specific questions and opportunities for open-ended feedback on transportation conditions, potential areas of improvement, and details about business characteristics and operations.

In light of ongoing transportation improvement efforts by the Fisherman's Wharf Community Benefit District (FWCBD), Port staff and the Seifel team consulted with Troy Campbell, FWCBD Executive Director to coordinate questions and information. Port staff was gratified to find a very high Survey participation rate of 42% from Fisherman's Wharf tenants, including several fishing industry businesses.

The Survey findings described in Attachment 2 generally validated many of the transportation-related issues of concern that have been communicated to Port and City staff. The Survey included questions soliciting tenants to rank the importance of 10 previously identified transportation improvements on a scale of 1 to 10. All ten improvements were found to have about equal importance to all respondents, as all were ranked between 5 and 6. However, when broken down by different geographic areas, some improvements were more important than others as compared to all respondents. Respondents also were asked to rate how much 13 different transportation issues impacted their businesses. The top six listed below were identified by more than 50% of the respondents:

1. Vehicle congestion (71%)
2. Event-related closures/back-ups on The Embarcadero (69%)
3. Parking availability (67%)
4. Delivery access (57%)
5. Construction (57%)
6. Backups during AT&T events (52%)

Port tenants and businesses greatly appreciated the Survey effort and attention on their transportation concerns. Beyond the questions and responses, the Survey process provided a direct means of communication, and the quality of information provided more nuanced insights into the issues and suggestions for improvements. The Survey included questions that invited open-ended comments and thoughts, which was embraced by many respondents; these verbatim comments are presented in Attachment 3. The information is intended to assist Port and City staff in ongoing efforts to improve transportation operations and facilities. For example, current efforts by SFMTA on the Embarcadero Enhancement Project to improve pedestrian and bicycle access will benefit from the Survey information.

Next Steps

The Seifel team will present the survey responses at the January 12, 2016 Port Commission meeting. Port staff is working with Seifel to develop a closing report that documents the findings and next steps, which is expected to be completed by the end of February 2016. This information will be shared with SFMTA and City agencies to assist efforts to further address and improve transportation services in the Northern Waterfront.

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Attachments

1. Survey Questionnaire
2. Summary of Survey Responses
3. Respondents' Verbatim Comments