



NORTHERN WATERFRONT TRANSPORTATION SURVEY ANALYSIS

APRIL 2016







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Executive Summary

The Port of San Francisco waterfront transportation survey was undertaken to gather important information from a broad array of Port tenants to help inform future plans for the northern waterfront. The tenant feedback from this survey will inform the update of the [Port's Waterfront Plan](#) and benefit the [Embarcadero Enhancement Project](#), an SFMTA project to improve the pedestrian environment on the Embarcadero Promenade, and create a safe bikeway along the waterfront.



Survey Background and Distribution

The survey questions were developed based on an analysis of transportation conditions and with input from key stakeholders including the Fisherman's Wharf Community Benefit District.

The survey was introduced and distributed through a series of emails and follow up communications, and targeted interviews of businesses identified by Port staff from September 2015 to January 2016.

The survey was sent to 266 Port tenant contacts and key groups located in the northern waterfront area from AT&T Park to Aquatic Park. Survey recipients were asked to share the survey with other interested parties, so some responses came from organizations located to the south of AT&T Park in the vicinity of Mission Rock and Pier 70.



Survey Responses

The combination of tenant interviews, ongoing tenant outreach and the use of an on-line survey tool resulted in significant participation by Port tenants, and the Port received 117 responses to the survey – over a 40% response rate.

Although the survey had a high response rate, it is not necessarily a representative sampling of tenants. For example, some locations had higher response rates than others, not all respondents responded to every question in the survey, and multiple people from an organization could contribute to the survey. Due to the small number of respondents within certain categories, such as location or business type, the survey results may not be directly representative of any a type of business.

As transportation conditions vary along the waterfront, Port tenants were asked to identify their geographic area, and survey responses were grouped and analyzed according to four locations.

Figure 1. Response by Location



“ Frequently difficult for employees and trucks to get in or out due to runs or other athletic events that seem to not need to notify tenants beforehand. ”

- SOUTH BEACH EXTENDED

A broad range of Port tenants responded to the survey, representing the broad mix of business uses in Port space, including office, retail, restaurant, entertainment, light industrial, warehouse, fishing and maritime.

- Small businesses with 0-5 employees (45%) contributed the largest share of responses, with the next-largest share (22%) coming from businesses with 100 or more employees.
- Seventy percent of responses came from tenants 10 years or longer, indicating that many long-term tenants are very interested in providing input on transportation conditions and issues of concern.





Transportation Issues and Impacts on Tenants

The survey findings generally validated many of the transportation-related issues of concern that have already been communicated to Port and City staff. The survey also provided a direct means of communication from tenants, which tenants greatly appreciated, as well as the opportunity for more-nuanced insights into issues and suggestions for improvements.

Respondents were asked to rate how much thirteen different transportation issues impacted their business. The top impacts varied by location of tenants, as shown below.

Fisherman's Wharf

- ▶ Vehicle congestion
- ▶ Event-related closures/backups on Embarcadero
- ▶ Backups/conflicts from cruise ships

Northeast Waterfront

- ▶ Backups/conflicts from cruise ships
- ▶ Pedestrian safety
- ▶ Bicycle safety
- ▶ Parking availability

Ferry Building Area

- ▶ Parking availability (there was a 6-way tie for 2nd, see Sidebar)

South Beach Extended

- ▶ Backups during AT&T Park events
- ▶ Vehicle congestion
- ▶ Event-related closures/backups on Embarcadero
- ▶ Construction

Sixty-six percent of tenants said their employees had transportation issues getting to work, and 61% said transportation issues impacted customers as well. According to tenants, more than two-thirds of employees in Fisherman's Wharf and South Beach areas drive to work, although most commute from within San Francisco. Ferry Building tenants had the highest employee usage of public transit.

TRANSPORTATION ISSUES AND IMPACTS TIED FOR 2ND, FERRY BUILDING AREA

1. Vehicle congestion
2. Event-related closures/back-ups on Embarcadero
3. Backups/conflicts from cruise ships
4. Crowding on E/F Muni lines
5. Pedestrian safety
6. Delivery access

“The biggest problem . . . is the traffic and confusion by Pier 39. The lane shifting around Bay and Beach streets is very confusing and the stoplights are extremely long in that area. Even when the Embarcadero is busy on the weekend, it flows well and then it bottlenecks horribly around Pier 39. And then you toss a cruise ship in there.”

- FISHERMAN'S WHARF



Public transit options (BART, Muni, Caltrain, Ferry) were rated “Good” or “Excellent” at serving employee needs by about half of respondents. Public transit issues affecting employee commutes include:

- ▶ Overcrowding on BART/Muni
- ▶ Crowding, delays and petty theft on the F Muni line (One tenant indicated that while employees are able to use the F to get to work, it is too crowded for the evening commute to make reliable transit connections.)
- ▶ Lack of available BART parking
- ▶ No overnight public transit

Tenants report that most of their deliveries arrive before noon, and 44% of respondents indicated that they experience challenges with deliveries, particularly in Fisherman’s Wharf. Overall, those receiving the most deliveries (16+ per week) are more likely to need curbside-loading and large truck access.

Top Priority Transportation Improvements

Tenants were asked to prioritize a list of ten previously identified transportation improvements on a scale from 1 to 10, with 10 being most important. All ten improvements were found to have about average importance when looking at results from all respondents. However, respondents from different locations indicated that some improvements were more important than others, as shown below. *Items in italics were unique as top priority improvements for that area.*

“The timing of lights tends to be rather frustrating. Especially in the afternoons and the evening, the timing appears to be the same as the morning and it shouldn’t be.”

- FISHERMAN’S WHARF

“There need to be more F/E lines, or a rapid bus from the Ferry Building to Pier 39 or the Alcatraz terminal.”

- NORTHEAST WATERFRONT

Fisherman’s Wharf

- ▶ Improved bicycle/pedestrian crossings of the Embarcadero
- ▶ Increased traffic signage and/or better signalization
- ▶ Enhanced sidewalks/increased street lighting

Northeast Waterfront

- ▶ *Increased ferry or water taxi service*
- ▶ Increased traffic signage and/or better signalization
- ▶ *Increased traffic enforcement/direction*
- ▶ Improved advance traffic alert communications for special events



“ Parking is very expensive for our clients. This makes in-office meetings a challenge. ”

- FERRY BUILDING AREA

“ Moving anywhere around AT&T Park and Pier 48 requires advance planning, and while the baseball schedule is published, the special event schedule seems to be a big secret. ”

- SOUTH BEACH EXTENDED



“ ... More than once I've narrowly missed being hit by a bike while having the right of way at the cross walk. ”

- NORTHEAST WATERFRONT

Ferry Building Area

- ▶ Increased traffic signage and/or better signalization
- ▶ Enhanced sidewalks/increased street lighting
- ▶ Improved bicycle and pedestrian crossings of the Embarcadero

South Beach Extended

- ▶ Improved advance traffic alert communications for special events
- ▶ Increased traffic signage and/or better signalization
- ▶ Enhanced sidewalks/increased street lighting
- ▶ *Increased awareness about availability of nearby parking*

Additional Feedback on Transportation Needs and Recommended Improvements

All the verbatim comments from tenant responses have been compiled, but a few concerns and recommendations are highlighted below to provide a flavor of the comments:

- ▶ Pier 45 fishing tenants indicated delivery/customer/parking access issues
- ▶ Traffic pinch point at Fisherman's Wharf and nearby intersections; requests for more traffic control officers
- ▶ Requests NOT to prioritize a bike lane over traffic lanes
- ▶ Worker-friendly transit needed from Ferry Building to the north, especially to accommodate those with commutes during evening office hours
- ▶ Requests for better lighting around Pier 48 and Pier 70



I. INTRODUCTION

The Port of San Francisco, in collaboration with the San Francisco Municipal Transportation Agency, Transportation Authority and Planning Department, is working to address long-term (10- to 20-year) transportation issues and to recommend transportation improvements along the waterfront. This report presents the findings from a survey that was undertaken to gather timely information from Port tenants that will be used to inform future planning efforts along the northern waterfront, such as the Embarcadero Enhancement Project.¹

All of the Port's tenants along the northern waterfront, from Aquatic Park to AT&T Park/Pier 40, were asked to participate in the survey, and a broad array of tenants participated. Given the different transportation conditions and issues within the northern waterfront area, this report summarizes the overall survey results and presents the results according to four geographic subareas.

This report is organized into the following sections. An Appendix is included, which presents greater detail on the survey results as well as supplemental information regarding the survey background and survey administration.

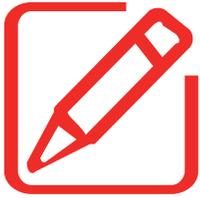
- ▶ **Survey Background and Structure** – Describes how the survey was developed and administered.

- ▶ **Profile of Tenants Responding to Survey** – Provides summary information about the tenants responding to the survey. More detailed respondent profile data is included in Appendix A.
- ▶ **Fisherman's Wharf Survey Analysis** – Provides summary analysis of survey responses from Fisherman's Wharf tenants. The Fisherman's Wharf area is defined as Aquatic Park to Pier 39. Appendix B contains detailed survey results for this area.
- ▶ **Northeast Waterfront Survey Analysis** – Provides summary analysis of survey responses from Northeast Waterfront tenants. The Northeast Waterfront area is defined as Pier 35 to Pier 9. Appendix C contains detailed survey results for this area.

- ▶ **Ferry Building Area Survey Analysis** – Provides summary analysis of survey responses from Ferry Building Area tenants. The Ferry Building Area is defined as Pier 5 to Pier 22 ½ Fireboat House. Appendix D contains detailed survey results for this area.
- ▶ **South Beach Extended Survey Analysis** – Provides summary analysis of survey responses from South Beach Extended tenants. The South Beach Extended area is defined as Pier 24 to approximately Pier 70. Appendix E contains detailed survey results for this area.
- ▶ **Summary of Key Survey Analysis** – Contains a summary of transportation impacts and issues affecting the survey population.



1. The Embarcadero Enhancement Project is a SFMTA project to create a safer and improved bikeway along The Embarcadero and to improve pedestrian safety on the Embarcadero Promenade.



II.

SURVEY BACKGROUND AND STRUCTURE

The Port of San Francisco's Northern Waterfront Transportation Survey (Port Transportation Survey) was undertaken to gather timely information from Port tenants that will be used to inform future planning efforts along the waterfront, such as the Embarcadero Enhancement Project.² A broad array of tenants participated in the survey, providing information about their businesses, associated transportation needs, and key concerns regarding current transportation conditions along the waterfront. The survey also gathered tenant feedback on potential transportation improvements that might be undertaken, in order to inform the Port and City of San Francisco about what improvements are considered highest priority by Port tenants.

As overall lead on the Port Transportation Survey effort, Seifel Consulting assembled a team that includes Nelson\Nygaard Consulting Associates (Nelson\Nygaard) and D&A Communications to complete the effort. Nelson\Nygaard performed a preliminary analysis of transportation conditions along the northern waterfront, gathering data on existing issues and identifying potential improvements. Appendix F presents the summary results of Nelson\Nygaard's analysis.

The transportation conditions and potential improvements identified from Nelson\Nygaard's analysis were used as important input to the survey development. The survey asked tenants to respond to several questions about transportation issues and impacts on their business.³ Potential improvement projects that might reduce or mitigate

transportation challenges along the waterfront were also identified and used to gather tenant input as to relative priority.

The D&A Communications team also gathered input from Port staff and key stakeholders, including the Fisherman's Wharf Community Benefit District, which was used to test the survey and identify information not previously gathered from businesses.

The survey included questions about tenant business characteristics (such as location, usage types, number of employees), as well as transportation conditions affecting employees getting to work, customers/clients getting to the tenant location, and tenant deliveries. The survey contained questions about the various modes of transportation used by both employees and customers/clients, including how well different modes work for

each group. The survey also solicited information about the number, timing and types of deliveries, and their access needs.

The survey also asked respondents to:

- ▶ Assess the impact of previously-identified transportation issues on their business,
- ▶ Prioritize different potential transportation improvements, and
- ▶ Suggest other improvement ideas.

Respondents were encouraged to provide open-ended comments and feedback throughout the survey. Appendix G includes the actual survey questions. All verbatim comments are included in Appendix H, edited only to maintain respondent anonymity.⁴

2. The Embarcadero Enhancement Project is a SFMTA project to create a safer and improved bikeway along The Embarcadero and to improve pedestrian safety on the Embarcadero Promenade.

3. The Nelson\Nygaard analysis, along with input from Port staff of known transportation issues, was used to generate a list of known issues and occurrences that might be affecting tenants. The Seifel team prepared the survey questions in collaboration with Port staff and did initial beta testing of the survey with Port tenants along the northern waterfront. D&A Communications facilitated the outreach effort to Port tenants, and Seifel Consulting led the survey reporting and data analysis effort. The graphic design of the report was done by D&A Communications.

4. All verbatim comments were provided to Port staff for review. Comments attached to this public document are edited to remove respondent identifying information.

A. Survey Distribution and Response

The survey was introduced and distributed through a series of emails and follow-up communications from D&A Communications, as well as through targeted interviews of tenant businesses identified by Port staff, all completed during September and October 2015. More than 90% of responses were received during this time period, with additional responses received as the result of continued outreach to targeted tenants through January 2016.

The survey was sent to 266 Port tenant contacts and key groups located in the northern waterfront area, from Aquatic Park to AT&T Park/Pier 40. The tenant interviews, ongoing tenant outreach and the on-line survey resulted in 117 responses to the survey – a response rate of over 40% – including responses from at least 14 of the 16 targeted

tenants identified by the Port.⁵ Since transportation conditions vary along the waterfront, Port tenants were asked to identify their geographic area, and survey responses are grouped and analyzed according to four geographic subareas. Survey recipients were encouraged to share the survey with other interested parties along the northern waterfront, and some responses came from organizations located to the south of AT&T Park in the vicinity of Mission Rock and Pier 70.

The survey included a varied mix of tenant business use types. Respondents were allowed to select all business types that applied to them, with many respondents selecting multiple uses. (Port structures often provide for a mix of uses, such as office with storage shed/warehouse.)

- ▶ Small businesses with 0-5 employees (45%) contributed the largest share of responses, with the next-largest share (22%) coming from businesses with 100 or more employees.
- ▶ Seventy percent of responses came from tenants of 10 years or longer, indicating that many long-term tenants are very interested in providing input on transportation conditions and issues of concern.
- ▶ More than 25% of respondents indicated their willingness to be contacted in the future, and provided contact information.

B. Caveats to Survey Results

Although the survey had a high response rate, the results are not a representative sampling. For example, some areas had a higher response rates than others, and not all respondents responded to every question in the

survey. As well, survey responses from a single organization could contain input from multiple people. Due to the small number of respondents within certain categories (such as location or business type), the survey results may

not be directly representative of any one type of business. This would also limit the ability to quantify impacts in terms of numbers of customers or employees affected by issues identified.



5. Fourteen of the sixteen targeted tenants were interviewed in person or indicated that they completed the survey online while the other two may have completed the survey online as well.



III.

PROFILE OF TENANTS RESPONDING TO SURVEY

The survey received 117 responses – a response rate of over 40% – including responses from at least 14 of the 16 priority tenants identified by the Port.

A. Tenant Profile

Port tenants frequently have a mix of uses at their locations, and respondents reported the following types of uses: office, retail, restaurants, entertainment destinations, light industrial, warehouse, commercial fishing and

maritime. (See Figure 1. Respondents were allowed to select all business types that apply, as Port buildings often provide for a mix of uses, such as office with warehouse, under a single roof.)

Businesses with fewer than 5 employees represented 45% of respondents. Businesses with more than 100 employees were the second-largest group, at 22% (Appendix A, Figure A-2). The majority of responses came from tenants of 10 years or more, as shown in Appendix A, Figure A-3.

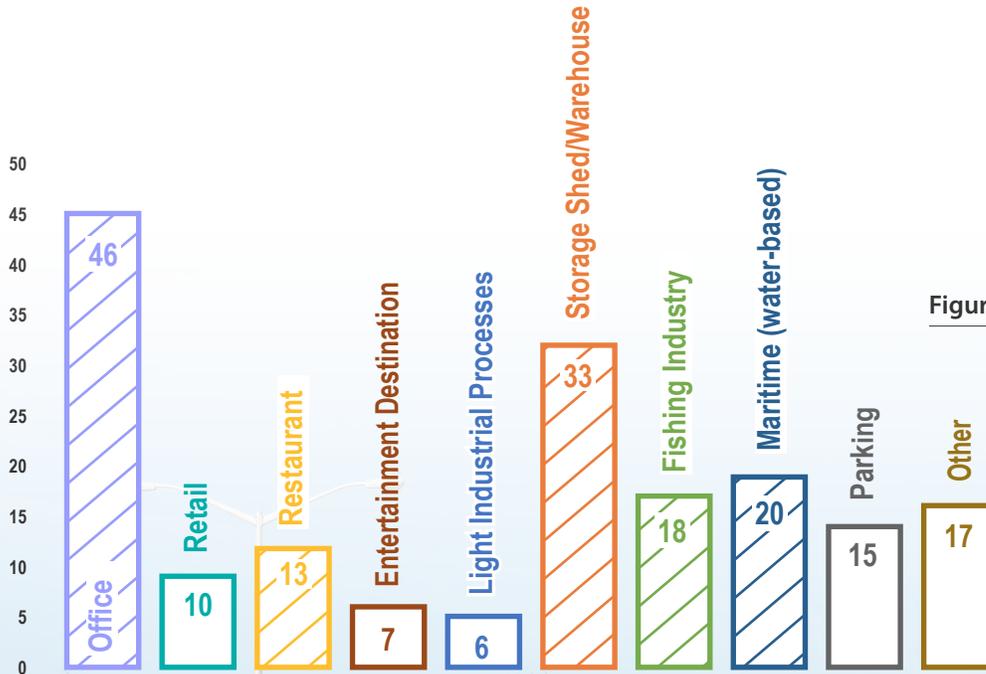


Figure 1. Usage Types – All Survey Respondents



B. Response Rates by Location

As transportation conditions vary along the waterfront, respondents to the survey were asked to identify their location, and survey responses are grouped and analyzed according to four geographic areas, as shown in Figure 2. Some responses came from areas to the south of the originally defined northern waterfront area, which was defined by AT&T Park/ Pier 40 to the south. As all of these

respondents indicated that their locations were south of AT&T Park, these responses were combined with South Beach responses for analysis purposes, and this group was renamed South Beach Extended.

As shown in Figure 2, below, the Fisherman’s Wharf and South Beach Extended areas had larger numbers of responses than did the Northeast

Waterfront or Ferry Building Area. Table 1 below shows the breakdown of the Port tenant contact list used for initial distribution of the survey versus the percentage of total survey responses received by location, and the resulting variance in response rates. This illustrates a key reason for reviewing the survey results by location, rather than just in aggregate.

C. Analysis by Location

The tenant usage types, the transportation environment, and the accessibility of different transportation modes vary extensively from Fisherman’s Wharf to AT&T Park and beyond. Analysis of the survey results found that there are significant differences in responses by location. The varying response rates by location also made generalizations across the entire area difficult—what was

important to Fisherman’s Wharf and South Beach Extended had a tendency to mask Northeast Waterfront and Ferry Building Area responses. For these reasons, most of the analysis is presented by location.

So that differences and priorities may be seen in context, the analysis by location evaluates only the responses for a given area. In particular, the usage

types and operating hours, along with the location context itself, have an influence on the issues and impacts that are important to that location, so key profile information is included for each survey location. Each of the following sections covers key findings in the survey results, with reference charts and a full set of survey response data found in the Appendix.

Figure 2. Response by Location

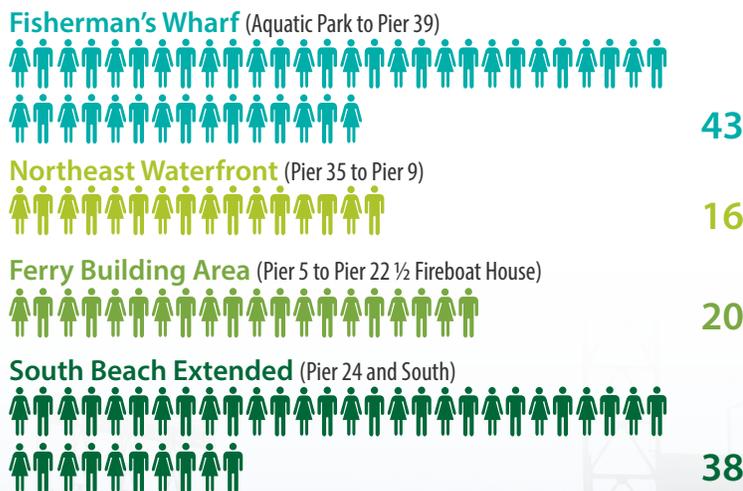


Table 1. Response Variance by Location

Location	Tenant Contact List	Survey Response	Response Variance
Fisherman's Wharf	28%	37%	+9%
Northeast Waterfront	20%	14%	-6%
Ferry Building Area	45%	17%	-28%
South Beach Extended	7%	33%	+26%





IV.

FISHERMAN'S WHARF

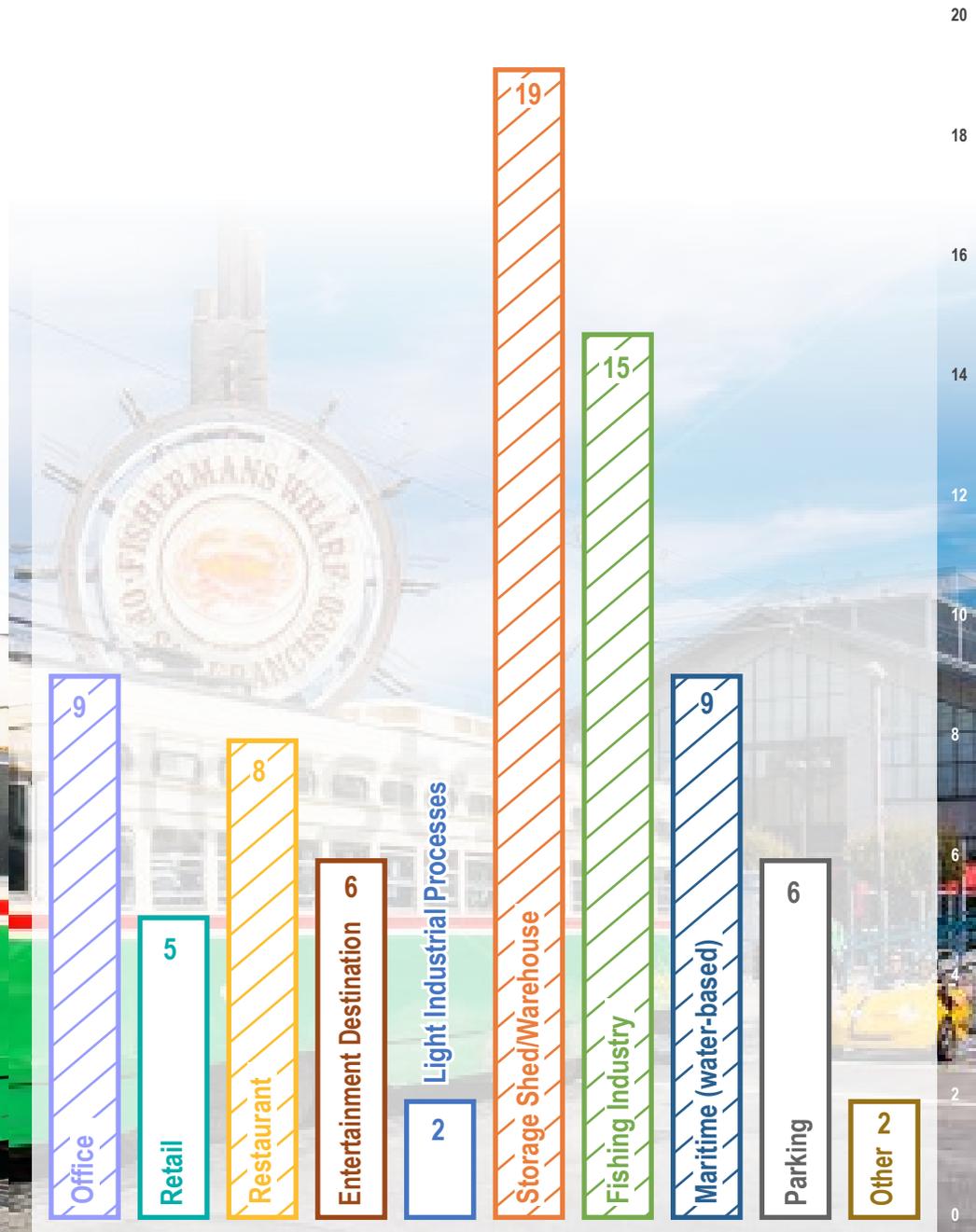
SURVEY ANALYSIS

The Fisherman's Wharf location includes a diversity of tenant uses, including entertainment destinations and commercial fishing businesses. Defined for the survey as Aquatic Park to Pier 39, the Fisherman's Wharf area has higher numbers of storage shed/warehouse, fishing industry, maritime, office, and restaurant uses, as shown in Figure 3. A complete set of survey data figures for the Fisherman's Wharf location is included in Appendix B.

Reflecting some of this diversity, many tenants operated almost around the clock, and fishing/maritime businesses often start before sunrise. Restaurant tenants also had hours extending into the evening/night time. The area also included 39% of responses from very small employers and 21% from large employers, as shown in Appendix B, Figure B-1.

Forty-five percent of tenants indicated they provided no transportation benefits or discounts to employees or customers. Of those that did, the most commonly offered benefit was free or discounted parking to employees (33%) and customers (25%). Employee benefits included transit discounts (18%) and bike racks or showers/ changing areas (15%).⁶

Figure 3. Usage Types – Fisherman's Wharf



6. Percentages do not add to 100 because respondents were asked to select multiple responses.

A. Employees

Fisherman's Wharf employees typically commute from around the immediate Bay Area, with San Francisco and East Bay indicated as the main locations where they live. The "other" response indicated a Central Valley location.

Nearly 70% of employees drive to work, rather than using other forms of transportation. This is likely related in part to employee work hours, as well as the relative lack of direct transit service to the area. At least one respondent indicated that employees are required to use a truck for their work in commercial fishing.

In one part of the survey, respondents indicated that employees are relatively well served by transit options (see Appendix B, Figure B-7). On the other hand, 74% of respondents indicated their employees had transportation-related difficulties getting to work. Explanation of the difficulties focused on:

- ▶ Parking issues due to limited space availability for fishermen and directly on piers
- ▶ Traffic challenges due to tourism and special events
- ▶ Limited transit options to the Pier 39 area, particularly during the extended early morning and late night hours that many employees work

Survey respondents noted the lack of BART/Muni service to the area in particular. "Driving" was the highest-percentage response when asked how employees arrive to work.

B. Customers

Customers reflect the diversity of uses in this area. Many tenants had customers who traveled from outside the Bay Area (including from international locations), while others generally did not serve customers at their location. For those who did have customers coming to their location, driving is the predominant transportation mode.

Fisherman's Wharf tenants rated the quality of transportation services lower for customers than for employees. (Compare Appendix B, Figure B-10 to Figure B-7.) On the other hand, 65% of tenants indicated that customers had transportation-related issues getting to the location, lower than for employees (74%). Explanations for customer issues focused on expense of parking, traffic congestion and limited availability of parking on the pier.

C. Deliveries

More than half of respondents in the Fisherman's Wharf location receive 16 or more deliveries weekly, with 75% of all deliveries between the hours of midnight and noon (Appendix B, Figures B-11 and B-12). Delivery access required was evenly distributed among types (Figure B-13), with one indicating that water access is needed.

Approximately half of respondents indicated they were aware of delivery drivers having difficulty finding a "convenient and legal" place to unload. Explanations focused on:

- ▶ Time and lane restrictions near Pier 39
- ▶ Challenges getting trucks onto and off of Pier 45
- ▶ General traffic congestion and limited loading areas



D. Transportation

Impacts

The issues with the greatest impact on Fisherman's Wharf are:

- ▶ Vehicle Congestion and Event-related Closures
- ▶ Backups along the Embarcadero
- ▶ Backups/Conflicts from Cruise Ships

The entire list is displayed in Figure 4, ordered from left to right based on impact.⁷ One issue "greatly impacting" a respondent (per their observation) is that permit parking is not enforced.

Fisherman's Wharf respondents were generally satisfied with the notice they receive in advance of events, with 81% either very satisfied or satisfied (Appendix B, Figure B-15).

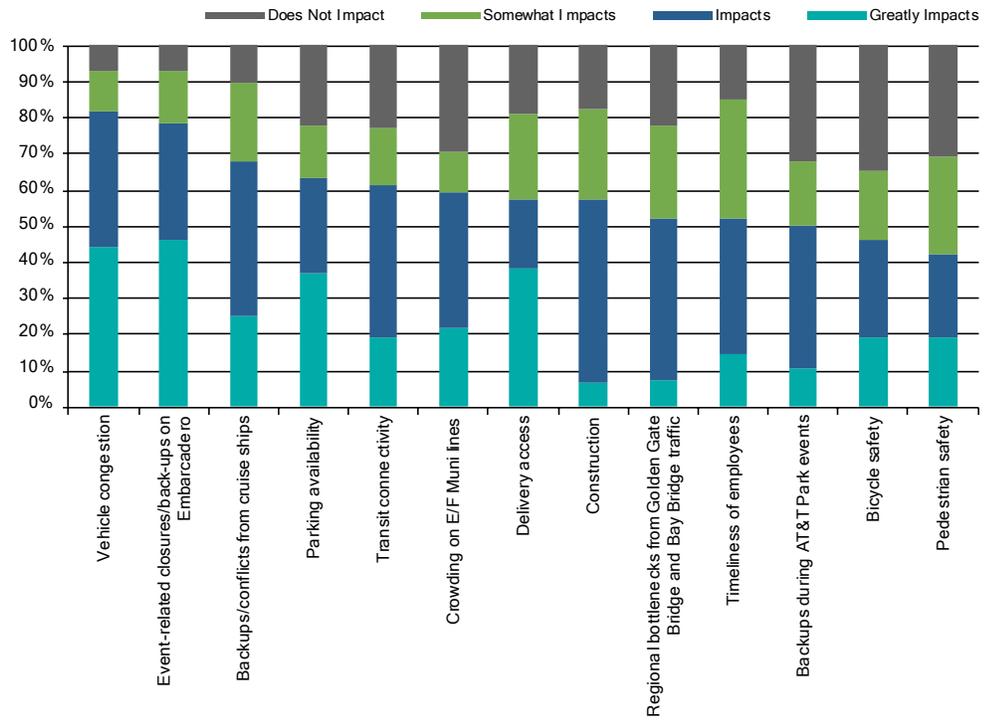
E. Top Priority Transportation Improvements

When asked to prioritize a list of potential improvement projects, Fisherman's Wharf respondents put the highest rating on:

- ▶ Improved bicycle and pedestrian crossings of the Embarcadero
- ▶ Increased traffic signage and/or better signalization
- ▶ Enhanced sidewalks/Increased street lighting

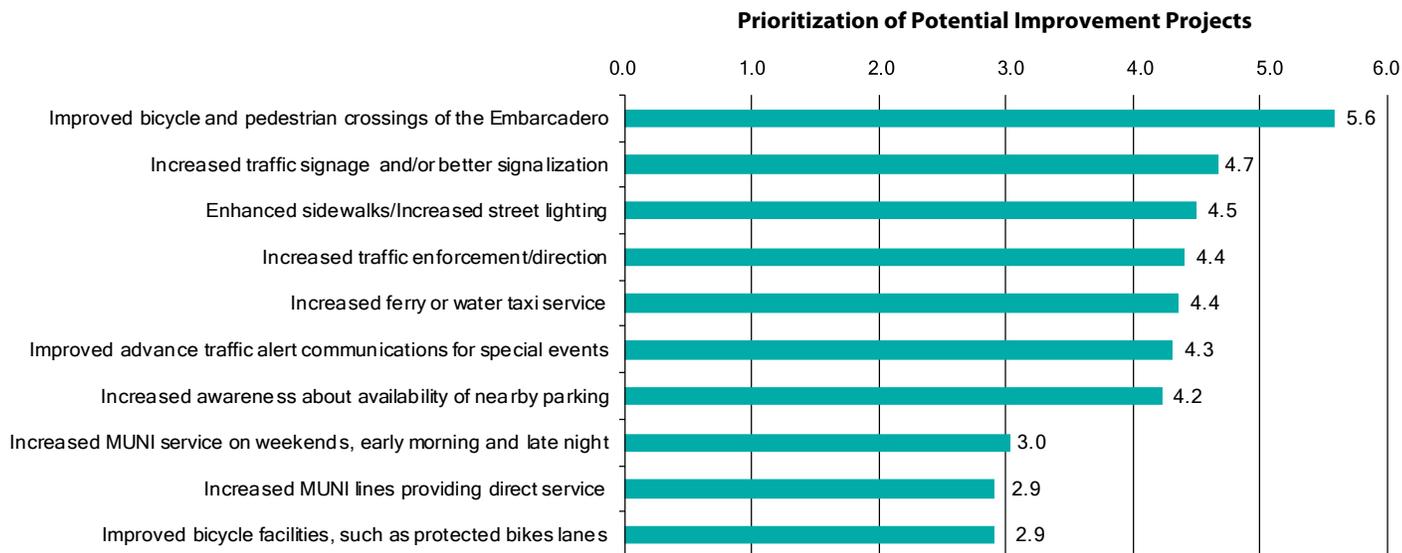
The entire ranking is shown in Figure 5.

Figure 4. Impact of Transportation-Related Issues - Fisherman's Wharf



7. The degree of impact was determined by combining "Greatly Impacts" and "Impacts" responses.

Figure 5. Prioritization of Potential Improvement Projects - Fisherman's Wharf



F. Additional Improvements

The survey responses included multiple requests for additional improvements, including:

- ▶ Regular or increased presence of traffic officers to keep traffic moving. (Challenges around Pier 39 were particularly noted, with congested intersections and lane shifting.)
- ▶ Additional Muni service and higher capacity service for commuters, particularly for evening commuters back to BART/Caltrain connections.
- ▶ No reduction in car lanes to create bicycle lanes.
- ▶ Improvement of light signalization timing and varied light timing based on traffic conditions.





V.

NORTHEAST WATERFRONT

SURVEY ANALYSIS

The Northeast Waterfront location is defined as Pier 35 to Pier 9. As shown in Figure 6, the usage in this location is also diverse, including office as the dominant use, with some fishing and maritime, light industrial and restaurant uses. A cruise terminal was one of the responses under "other".

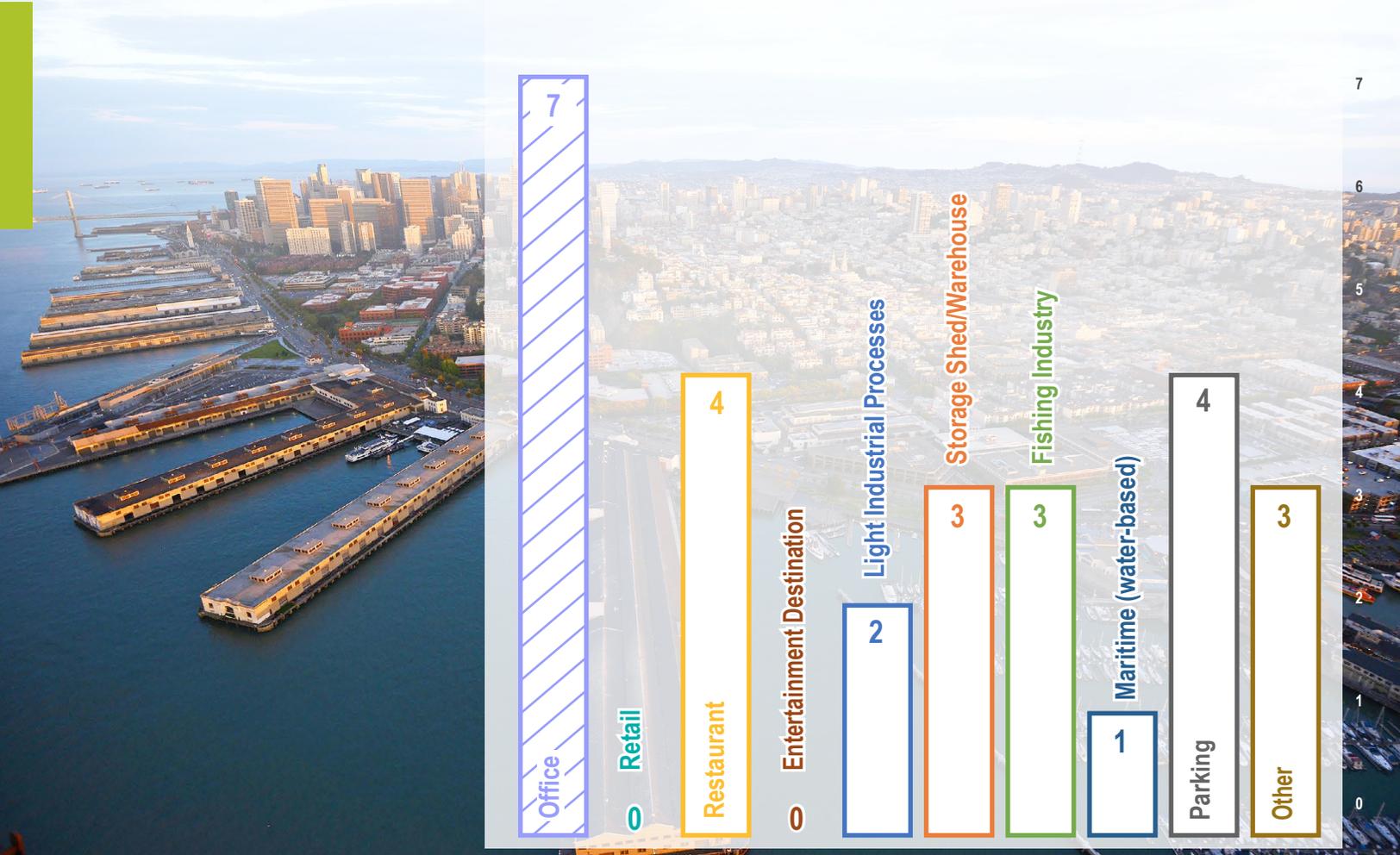
A complete set of survey data figures for the Northeast Waterfront location is included in Appendix C.

Ninety-four percent of Northeast Waterfront tenants operate primarily on weekdays, and the majority of tenants have primary hours of 8 AM to 6 PM (Appendix C, Figure C-2).

The size of Northeast Waterfront tenant businesses (based on number of employees) is larger than in other locations. One quarter of tenants have more than 100 employees at their locations, and three quarters have more than 26 employees, as shown in Appendix C, Figure C-3.

Although 47% of tenants indicated they provide no transportation benefits or discounts to employees or customers, 27% offer transit, bicycle amenities and parking discounts to employees (Appendix C, Figure C-4).

Figure 6. Usage Types – Northeast Waterfront



A. Employees

Employees primarily commute from San Francisco and East Bay, with one tenant having some employees from beyond the Bay Area (Appendix C, Figure C-5).

Driving is the predominant single transportation mode used by employees, estimated at over 50%. Muni and BART usage are estimated at about 30% each (Appendix C, Figure C-6). Ratings of how well public transit service options met employee needs ranged from about 25% “Good” for Muni to over 50% “Good” for BART and Caltrain. Ferry service “Excellent” and “Good” ratings were over 60% (Figure C-7).

The ratings of the various transportation service categories from this area seem to be consistent with the fact that 75% of respondents indicated that employees have transportation-related difficulties getting to work. Explanation of the difficulties included:

- ▶ Crowding and delays on the F Market Muni line, sometimes requiring staff to walk 1.5 miles from Market Street
- ▶ Crowding on BART
- ▶ Vallejo Ferry being full
- ▶ Delays on buses due to south of Market traffic issues
- ▶ Unreliable transit schedules and delays
- ▶ Traffic challenges due to cruise ships and general congestion
- ▶ Not enough parking for those who either work nights/very early mornings, or expect to park on the pier (parking was “not an issue” for other tenants)

One respondent commented on having requested a bike rack, and having been told that bikes must be kept inside the building.

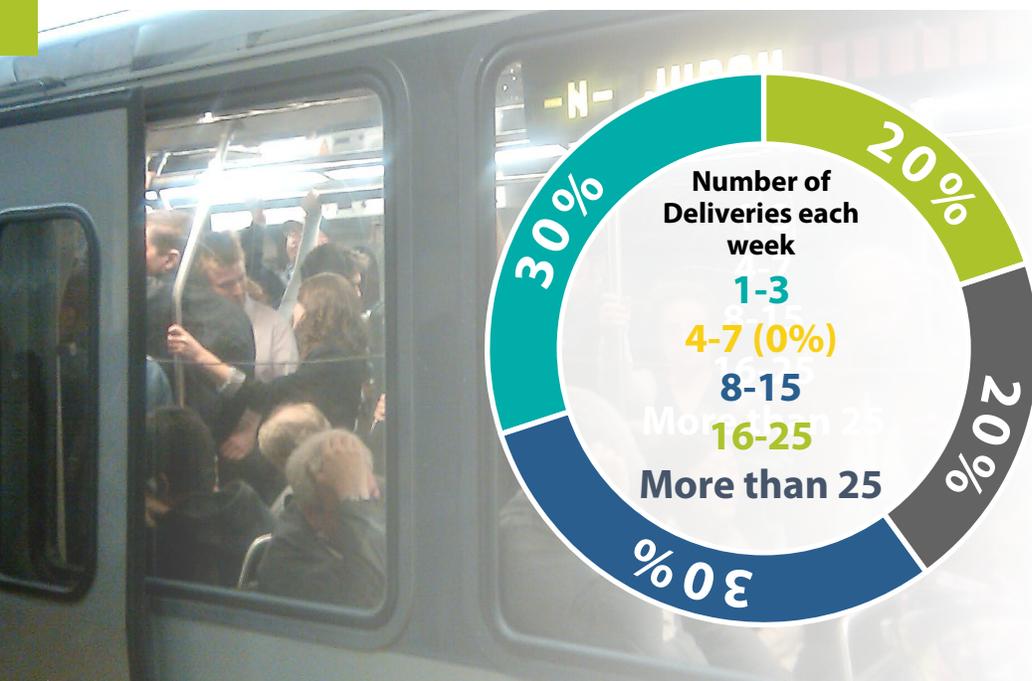
B. Customers

Seventy percent of tenants indicated that clients had difficulty getting to the location. Issues noted included general traffic and overcrowding on the F Market Muni line.

The largest group of customers is believed to travel from within San Francisco, with the second largest group comprised of a mix of clients traveling from outside the Bay Area and those who don’t have clients at their location (Appendix C, Figure C-8).

For those who do have customers coming to the location, driving dominates as the transportation mode, with 80% of customers estimated to drive. Muni (35%), BART (20%), walking (20%) and ride-booking services (20%) were the other main modes used (Appendix C, Figure C-9).⁸ Ratings of service categories ranked parking lowest among the categories used by clients and customers (Figure C-10).

Figure 7. Weekly Number of Deliveries – Northeast Waterfront



C. Deliveries

Seventy percent of tenants were not aware of delivery parking issues. One response indicated it is difficult to find a delivery zone space in the Pier 33-35 area.

Responses about the number of deliveries in the Northeast Waterfront location were fairly evenly spread across the range, as shown in Figure 7.

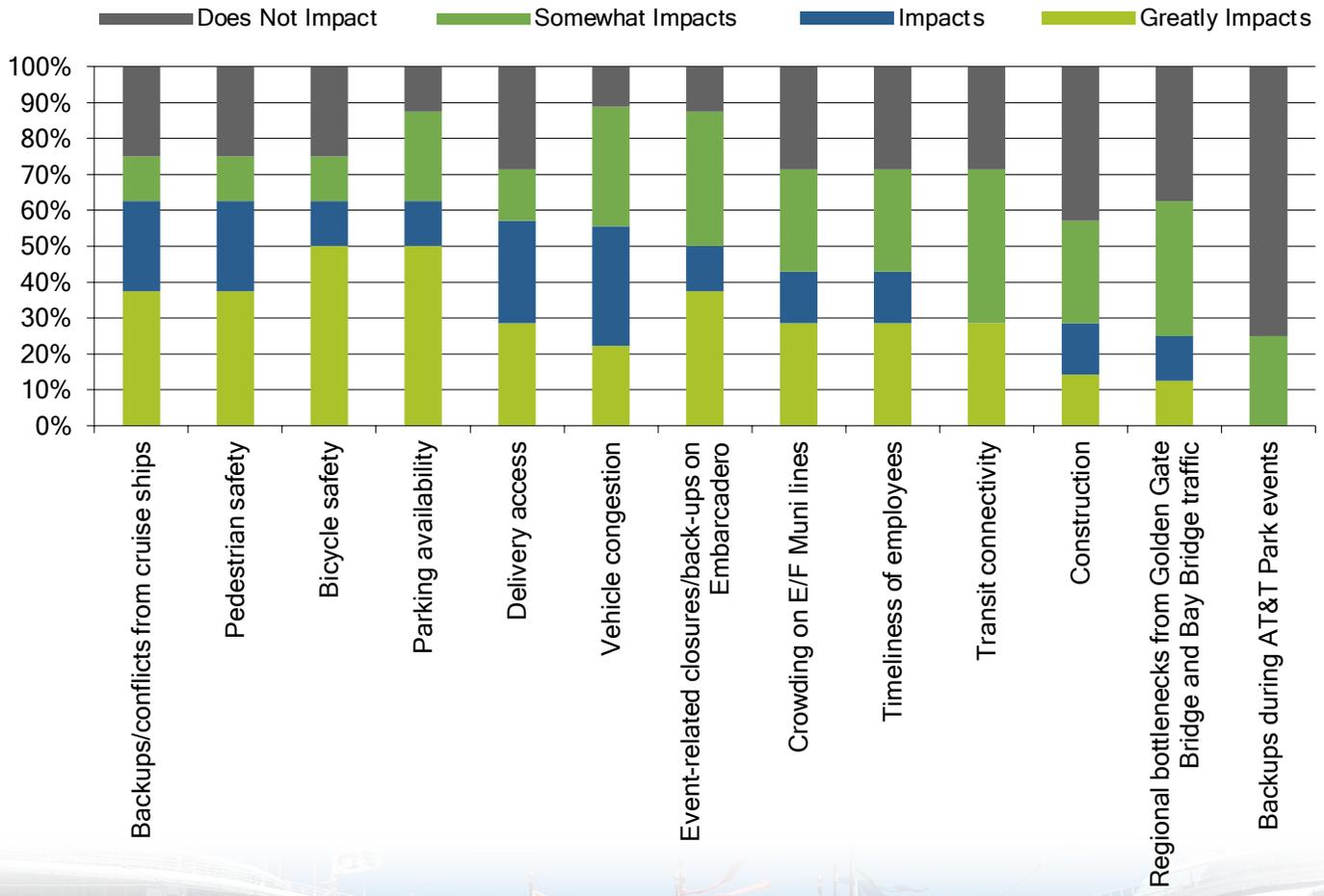
Ninety percent of all deliveries come before noon, and the need for delivery access was evenly distributed among types, with parking as the dominant need (Appendix C, Figures C-12 and C-13).

8. Percentages do not add to 100%, because these represent averages across survey respondents.

D. Transportation Impacts

Northeast Waterfront responses clustered several issues together in terms of impact, as shown in Figure 8. The entire list is displayed below, ordered from left to right based on impact.⁹ Respondents reported that backups/conflicts from cruise ships, pedestrian safety, bicycle safety and parking availability are the transportation issues that most impact or greatly impact them.

Figure 8. Transportation Issue Impact Ratings – Northeast Waterfront



9. The degree of impact was determined by combining "Greatly Impacts" and "Impacts" responses.

E. Top Priority Transportation Improvements

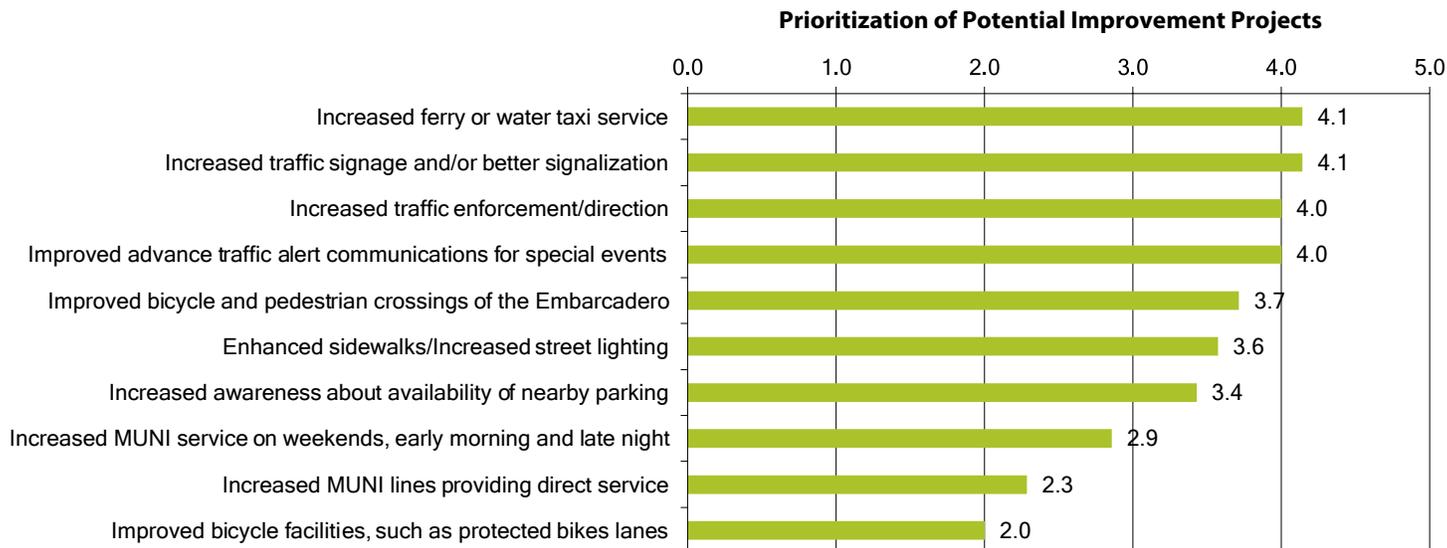
When asked to prioritize a list of potential improvement projects, Northeast Waterfront respondents put the highest rating on:

- ▶ Increased ferry or water taxi service
- ▶ Increased traffic signage and/or better signalization
- ▶ Increased traffic enforcement/direction
- ▶ Improved advance traffic alert communications for special events



The entire ranking is shown in Figure 9.

Figure 9. Prioritization of Potential Improvement Projects – Northeast Waterfront



F. Additional Improvements

Northeast Waterfront survey respondents also requested the following additional improvements:

- ▶ More direct transit and more transit capacity from the Ferry Building to Pier 39 and the Alcatraz terminal
- ▶ More commercial parking near Pier 33
- ▶ Better bicycle traffic enforcement (i.e., bicycles stopping at lights)





VI.

FERRY BUILDING AREA SURVEY ANALYSIS

The Ferry Building Area location was defined as Pier 5 to Pier 22 ½ Fireboat House. Tenants had office as the dominant use, with some retail, maritime and parking, as shown in Figure 10. A complete set of survey data figures for the Ferry Building Area location is included in Appendix D.

Weekday office hours (8 AM to 6 PM) were primary operating hours for over 80% of respondents (Appendix D, Figure D-2). Half of respondents have more than 100 employees at this location, although the majority of the rest have 5 and fewer employees (Figure D-3).

Forty-four percent of tenants indicated they provided no transportation benefits or discounts to employees or customers, however 33% offer transit benefits to employees, and 28% offered bicycle amenities to employees (Appendix D, Figure D-4).

Figure 10. Usage Types – Ferry Building Area

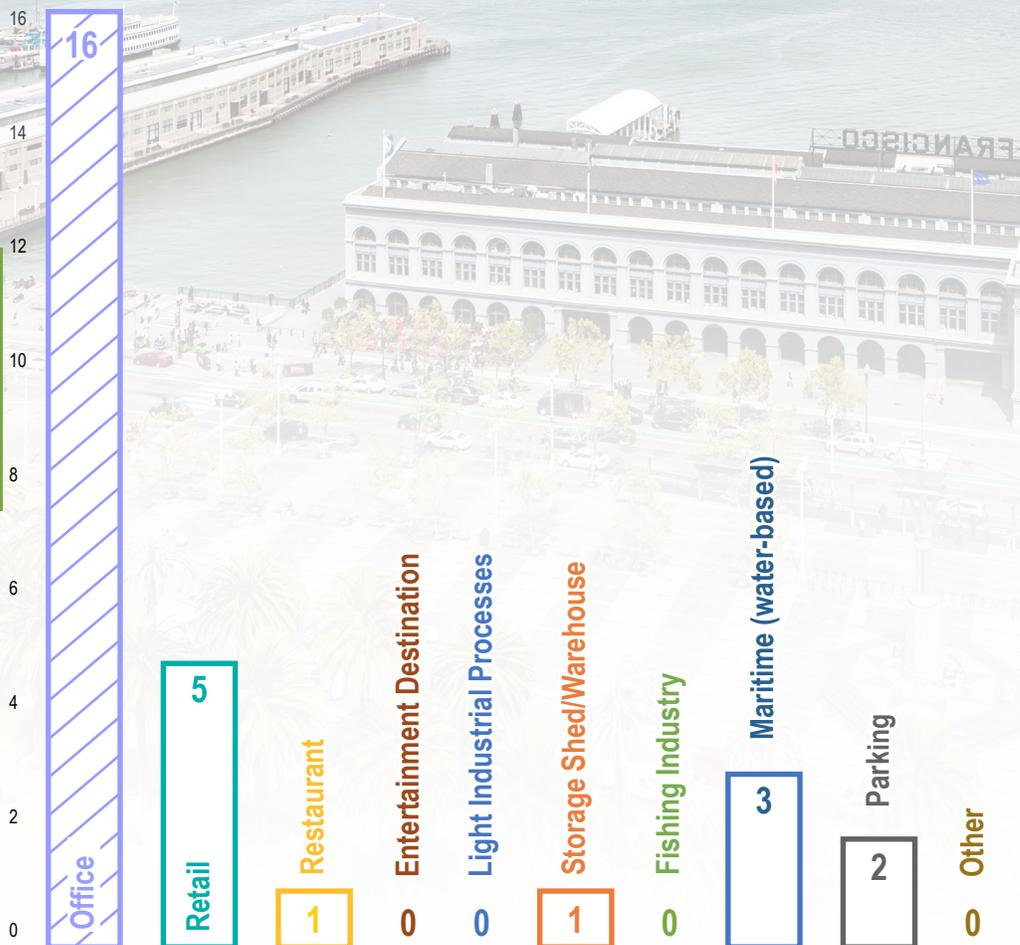


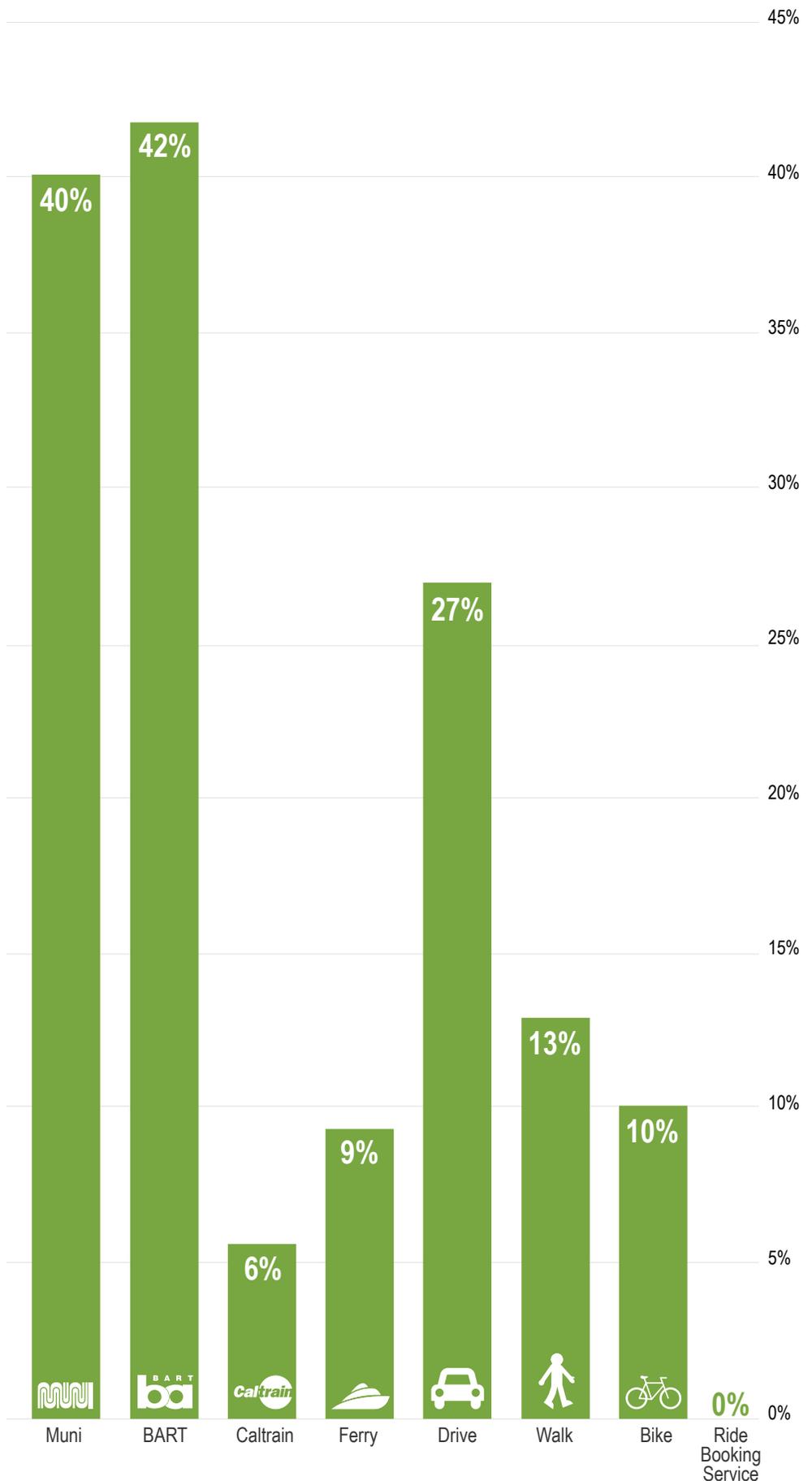
Figure 11. Employee Transportation Modes – Ferry Building Area

A. Employees

Eighty-five percent of Ferry Building Area tenants reported employees have transportation-related difficulty getting to work. Explanation of the difficulties included:

- ▶ BART delays and overcrowding
- ▶ Unreliable morning BART and Muni service
- ▶ Multiple comments that BART parking lots fill up and are expensive, with some parking only available across busy streets
- ▶ Muni F line too full to pick up passengers
- ▶ No parking or limited, expensive parking
- ▶ General complaints about late bus or BART service, changes in ferry schedules, and a lack of parking

Employees commute primarily from San Francisco and East Bay (Appendix D, Figure D-5), and public transit, rather than driving, is the predominant transportation mode for employees in the Ferry Building Area (Figure 11). Muni and BART are used by approximately 40% of employees, the highest use of all the survey areas.¹⁰ Access roads and parking received the least-favorable ratings among transportation service categories for employees (Appendix D, Figure D-7).



10. Percentages do not add up to 100 because these figures represent averages of estimates across all responses.

B. Customers

Forty-five percent of customers travel from within San Francisco (Appendix D, Figure D-8), yet more than 50% of customers drive to tenant businesses in this area (Figure D-9).¹¹ Parking received the lowest rating of transportation service categories used by clients and customers, with a 35% rating of “poor” (Figure D-10).

Sixty-two percent of tenants indicated that clients had difficulty getting to the location. Parking issues in particular were noted, including:

- ▶ Parking lots are full by 9 AM, so clients have difficulty finding parking
- ▶ Parking is very expensive for clients, making in-office meetings a challenge
- ▶ Parking is too far away, making shopping inconvenient

Crowding on transit lines and traffic on the Embarcadero are also issues.

C. Deliveries

More than half of tenants indicate that they receive 7 or fewer deliveries per week, although the rest receive 16 or more, with delivery times spread throughout the day (Appendix D, Figures D-11 and D-12). Curb loading was the main delivery access need. Two thirds of respondents indicated they have noticed delivery issues. Particular challenges include:

- ▶ Limitations on delivering to the Ferry Building
- ▶ Limited 30-minute delivery times are too short
- ▶ Congestion in delivery area leading drivers to circle the Embarcadero
- ▶ Loading zone always full
- ▶ No “white” zone
- ▶ Being ticketed for receiving large equipment which required loading in front of the building
- ▶ Issues with security staff dealing with deliveries

D. Transportation Impacts

Parking stands out as the greatest impact for the area. Six other issues tie for second in terms of impact, as shown in Figure 12, which includes the entire list, ordered from left to right based on impact.¹² Given the large proportion of responses indicating challenges with customer parking, this result is not surprising.

A majority of respondents were very or somewhat satisfied with the notice they receive in advance of events, but room for improvement was also indicated, given that 36% were somewhat or very dissatisfied with the advance notice they receive (Appendix D, Figure D-15).

Challenges due to bicycles and motorized scooters along the Embarcadero walkway was reported as an additional issue of concern.



11. Percentages do not add up to 100 because these figures represent averages of estimates across all responses.

12. The degree of impact was determined by combining “Greatly Impacts” and “Impacts” response

E. Top Priority Transportation Improvements

When asked to prioritize a list of potential improvement projects, utmost on the list for Ferry Building Area tenants are:

- ▶ Increased traffic signage and/or better signalization
- ▶ Enhanced sidewalks/increased street lighting
- ▶ Improved bicycle and pedestrian crossings of the Embarcadero

The entire ranking is shown in Figure 13.

Figure 12. Transportation Issue Impacts – Ferry Building Area

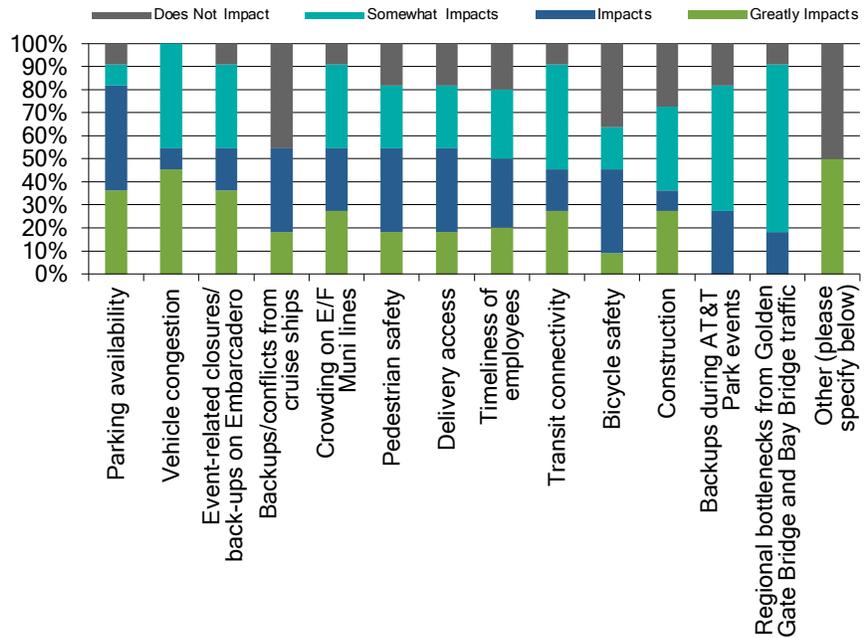
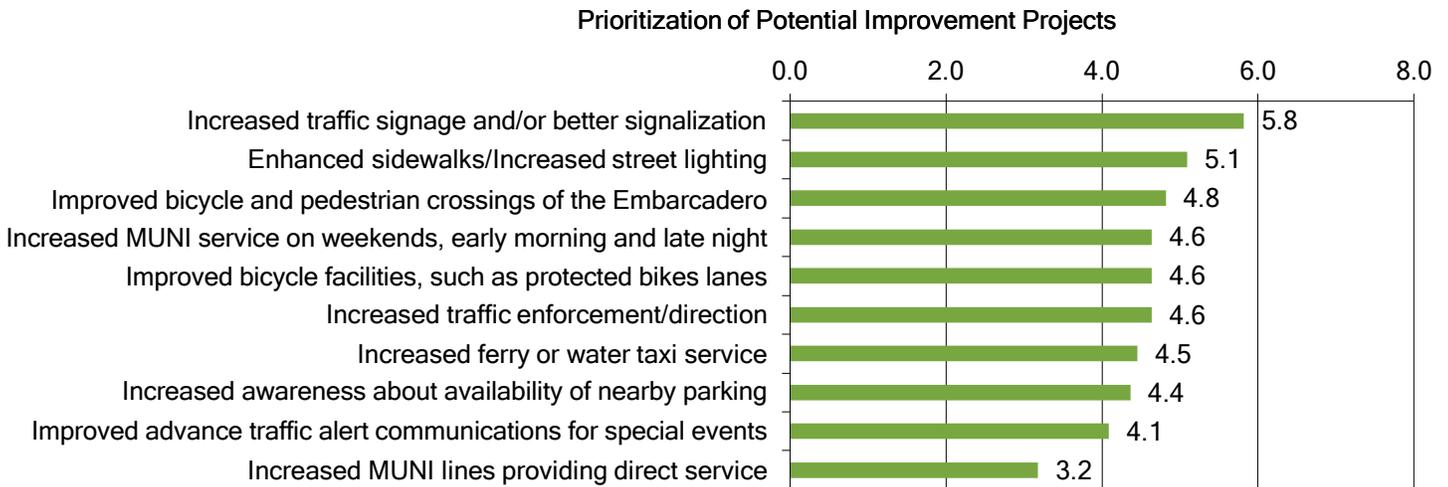


Figure 13. Prioritization of Potential Improvement Projects – Ferry Building Area



F. Additional Improvements

Ferry Building Area survey respondents requested the following additional improvements:

- ▶ Short term, nearby parking for Ferry Building customers/clients (“enough to provide for a meeting”)
- ▶ Bicycle-speeding enforcement, and keeping bicycles and pedicabs off the sidewalks, while acknowledging the dangers of the bike lane
- ▶ Consideration of how deliveries need to work for tenants
- ▶ Improved business signage on the street side



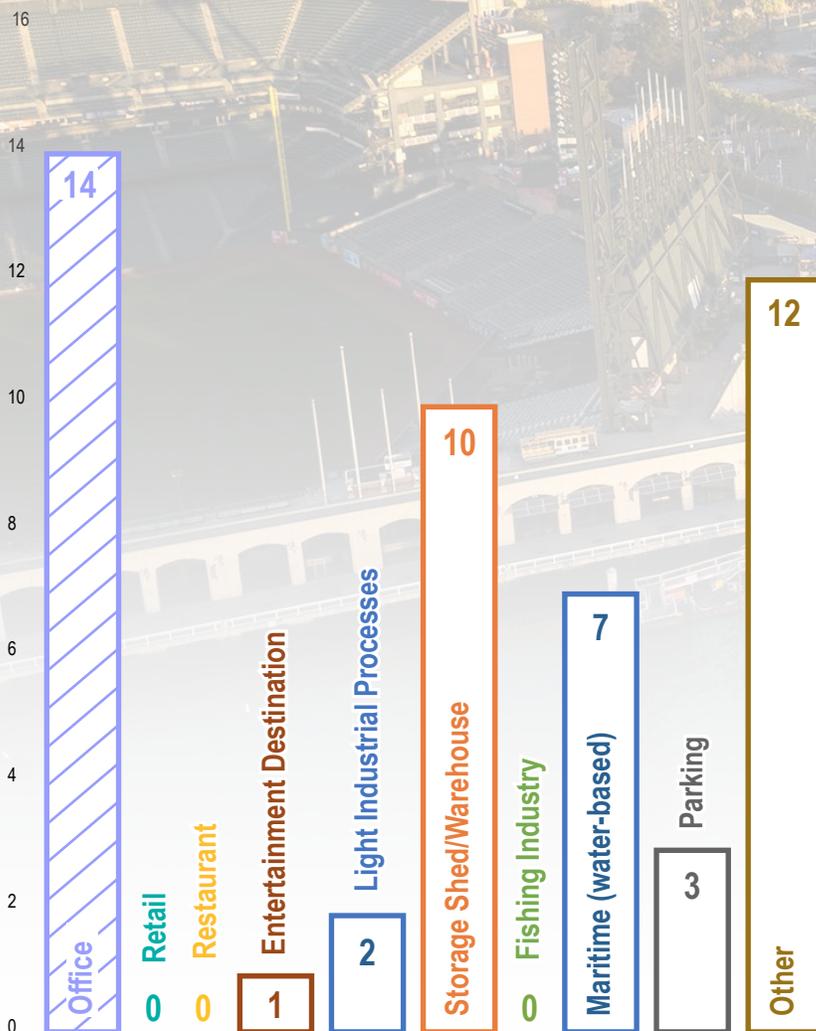
VII.

SURVEY ANALYSIS

SOUTH BEACH EXTENDED

The South Beach Extended location is defined as Pier 24 to approximately Pier 70. Respondents from this location primarily use office, storage shed/warehouse, maritime, and other types of space, which include a number of artist spaces as well as moving and special events businesses.¹³ Respondents reported no retail, restaurants or fishing uses. See Figure 14 below for the usage types. A complete set of survey data figures for the South Beach Extended location is included in Appendix E.

Figure 14. Usage Types – South Beach Extended



Operating hours in this area varied, with one-third of tenants specifying 24-hour, 7-days-a-week operation (Appendix E, Figure E-2). Sixty-five percent of tenants in this area have 5 or fewer employees (Appendix E, Figure E-3).

Sixty-four percent of tenants indicated they provided no transportation benefits or discounts to employees or customers, and 22% indicated that they offer free or discounted parking to employees (Appendix E, Figure E-4).

13. Appendix E, Figure E-1 has additional detail on the "Other" responses.

A. Employees

Employees primarily commute from San Francisco and East Bay (Appendix E, Figure E-5). Driving is the predominant transportation mode for employees in this area, with over 70% driving (Figure E-6). Parking received the most favorable ratings among transportation services in the area, followed by bike facilities and ferry services (see Figure 15). Events at AT&T Park were noted as having adverse impact on parking.

Forty-seven percent of South Beach Extended respondents reported employees having transportation-related difficulty getting to work, the lowest percentage of all survey locations. Explanation of the transportation difficulties included:

- ▶ Events without advance tenant notice
- ▶ Lack of early Sunday morning Muni service
- ▶ Lack of services convenient to Bay View Boat Club
- ▶ Traffic congestion and lack of parking
- ▶ Special events and associated traffic, and AT&T Park events
- ▶ Parking full at 6 AM
- ▶ Construction delays and associated traffic
- ▶ Schedule that requires arrival when transit doesn't run
- ▶ Tire hazard due to old rail tracks
- ▶ Transit delays

B. Customers

The largest group of customers travels from within San Francisco, with a significant percentage arriving by water or by taxi from regional airports (Appendix E, Figure E-8). Driving is the dominant transportation mode for customers coming to tenant

Figure 15. Rating of Transportation Services for Employees – South Beach Extended



businesses in this area (Appendix E, Figure E-9). Unlike the ratings of transportation service categories for employees, customer survey respondents rated bike facilities highest among the categories used by clients

and customers, followed by Muni and parking (Figure 16). This variance may be based on the fact that a subset of tenants have customers come to the location, and that some arrive by boat or airport transfers.

Fifty-four percent of tenants indicated that clients had difficulty getting to the location. Multiple explanations indicate that it takes longer to travel across the city than clients anticipate, and that navigating San Francisco in general is challenging. Particular issues noted:

- ▶ 3rd Street congestion
- ▶ Traveling the Embarcadero during events and traffic due to Giants games
- ▶ Boater access to Bay View Boat Club
- ▶ Lack of street signs to get to Pier 70/Noonan building
- ▶ BART and Muni delays
- ▶ Lack of parking

C. Deliveries

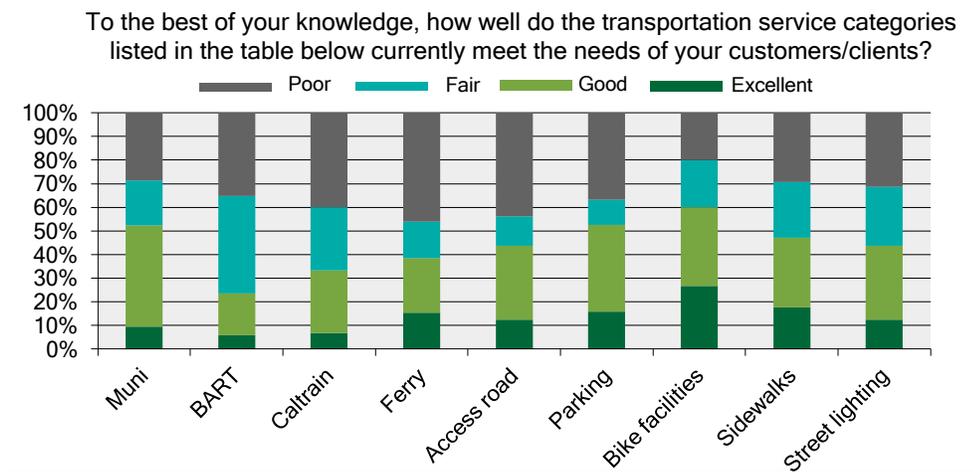
One third of respondents noted that they have delivery issues. Several responses indicate that they lack any loading zone in their immediate vicinity. More than half of tenants receive three or fewer deliveries per week (Appendix E, Figure E-11), and delivery times are spread throughout the day (Figure E-12). One respondent indicates the need to take delivery of buses.

D. Transportation Impacts

The South Beach Extended location identified three issues regarding event-related backups/traffic, as well as construction, as having the greatest impact in the area. These four and the remaining issues are ordered by their rated impact, as shown in Figure 17.

This is the only area that identified construction as a top impact. The entire

Figure 16. Ratings of Transportation Services for Customers – South Beach Extended



list is displayed below, in order from left to right based on impact.¹⁴

Respondents identified the following issues in the “Other” category:

- ▶ Events at Pier 70 disrupting access to rental space
- ▶ Boaters with difficulty accessing the Bay due to traffic and parking challenges

- ▶ Bicyclists and pedestrians increasing congestion and driving hazards through disregard of traffic rules

14. The degree of impact was determined by combining “Greatly Impacts” and “Impacts” responses.

E. Top Priority Transportation Improvements

When asked to prioritize potential improvement projects, South Beach Extended tenants put highest priority on:

- ▶ Improved advance traffic alert communications for special events
- ▶ Increased traffic signage and/or better signalization
- ▶ Enhanced sidewalks/increased street lighting
- ▶ Increased awareness about availability of nearby parking

The entire ranking is shown in Figure 18.

Figure 17. Impacts of Transportation Issues – South Beach Extended

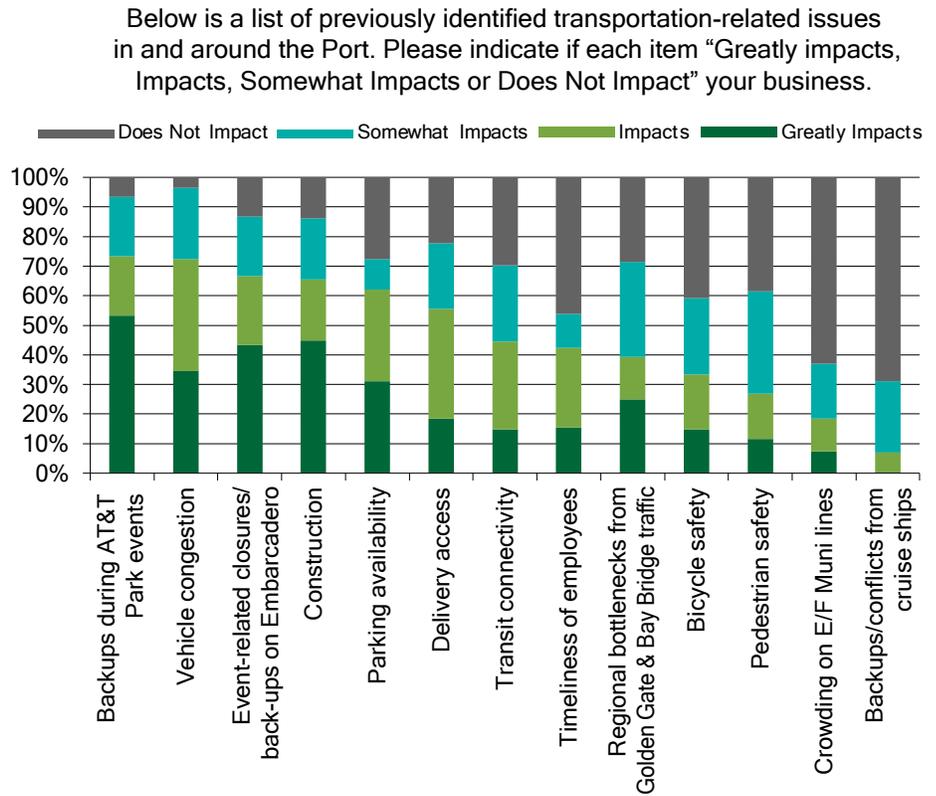
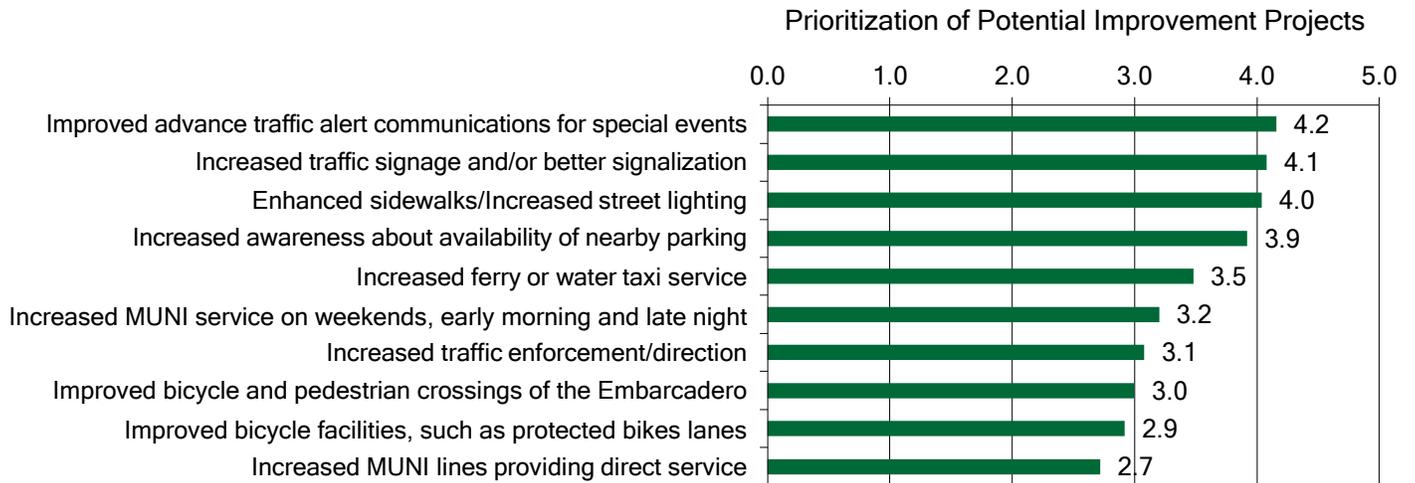


Figure 18. Prioritization of Potential Improvement Projects – South Beach Extended



F. Additional Improvements

South Beach Extended survey respondents requested additional notification of all events and street closures, and better facilitation of traffic during and after events:

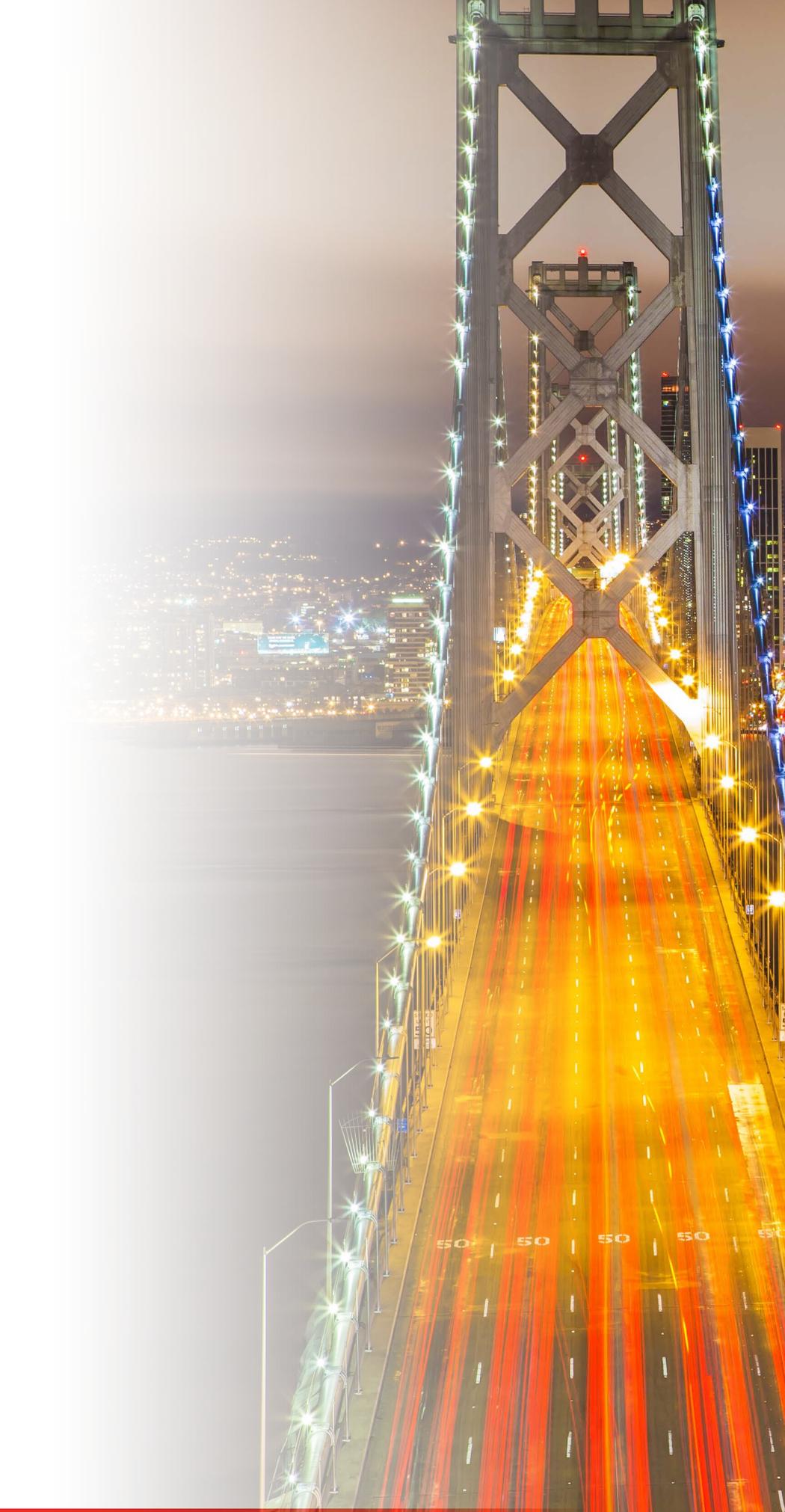
- ▶ A single calendar of all AT&T Park events, including special events at the venue.
- ▶ Better tenant notification in advance of street closures for any purpose. Events must make provisions for business foot traffic crossing the Embarcadero to get to locations like Pier 26-28 and Pier 30-32. (A 5- to 10-minute wait with notice is acceptable. An hour-long wait is not.)
- ▶ Improve traffic flow after SF Giants games. (It takes one hour to go one mile from Pier 50 to the Bay Bridge after a Giants game. Increase enforcement of pedestrian crossings of street corners—they ignore flashing red signals, and hold up turning traffic.)

Other requested transportation-related improvements include:

- ▶ Allowing tenants to park in the AT&T parking lot, and in other Port lots outside of Port business hours.
- ▶ Better lighting and signage around Pier 70.
- ▶ Removal of, or paving over, the old rail tracks on Illinois Street between 16th Street and Cesar Chavez. (The rails are dangerous for bicycles, motorcycles and scooters, which can get caught in the rails and be hit from behind by other vehicles.)
- ▶ Increasing enforcement of bicyclists who ignore stop signs, red lights and traffic direction, and who ride on sidewalks.

A suggestion was made regarding vehicle and pedestrian traffic on the Embarcadero:

- ▶ The current northbound side of Embarcadero should only be open to human-powered vehicles and pedestrians. Emergency vehicles could easily gain access when necessary and delivery trucks could access during designated hours. Meanwhile, the current southbound side could accommodate four lanes of auto traffic with arrows/lighting that may change based on demand. Additionally, a protected bikeway could go in next to the F Market line.





VIII. SUMMARY OF KEY SURVEY ANALYSIS

The survey findings generally validated many of the transportation-related concerns already communicated to Port and City staff. The survey also provided a direct means of communication from tenants (greatly appreciated by tenants), as well as the opportunity for more-nuanced insights into issues and suggested improvements.

A. Transportation Impacts

Respondents were asked to rate how 13 different transportation issues impacted their businesses. The top issues varied by location of tenants, as shown below and as discussed in the section on each geographical location, earlier in this report.¹⁵

Fisherman's Wharf

- ▶ Vehicle congestion
- ▶ Event-related closures/backups on Embarcadero
- ▶ Backups/conflicts from cruise ships

Northeast Waterfront

- ▶ Backups/conflicts from cruise ships
- ▶ Pedestrian safety
- ▶ Bicycle safety
- ▶ Parking availability

Ferry Building Area

- ▶ Parking availability¹⁶

South Beach Extended

- ▶ Backups during AT&T Park events
- ▶ Vehicle congestion
- ▶ Event-related closures/backups on Embarcadero
- ▶ Construction

Sixty-six percent of tenants overall said their employees had transportation-related issues getting to work, and 61% said transportation issues impacted customers as well. According to tenants, more than two-thirds of employees in Fisherman's Wharf and South Beach areas drive to work, although most commute from within San Francisco. Ferry Building tenants had the highest employee usage of public transit.

Public transit options (BART, Muni, Caltrain, Ferry) were rated "Good" or "Excellent" at serving employee needs by about half of respondents. Public transit issues affecting employee commutes include:

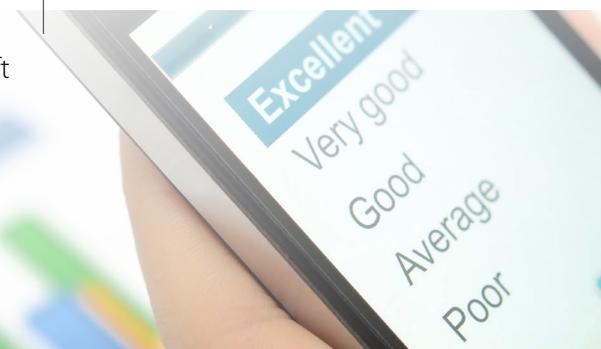
- ▶ Overcrowding on BART/Muni
- ▶ Crowding, delays and petty theft on the F Muni line (One tenant indicated that while employees are able to use the F to get to work, it is too crowded for the evening commute to make reliable transit connections.)

- ▶ Lack of available BART parking
- ▶ No overnight public transit

Tenants report that most of their deliveries arrive before noon, and 44% of respondents indicate experience challenges with deliveries, particularly in Fisherman's Wharf. Overall, those receiving the most deliveries (16+ per week) are more likely to need curb-loading and large truck access.

B. Top Priority Transportation Improvements

Tenants were asked to prioritize a list of ten previously identified transportation improvements on a scale from 1 to 10, with 10 being most important. All ten improvements were found to have about average importance when looking at results from all respondents. However, respondents from different locations indicated that some improvements are more important than others, as shown below. **Items in italics were unique as top-priority improvements for the area.**



15. The degree of impact was determined by combining "Great Impacts" and "Impacts" responses.

16. There was a six-way tie for second place, with a 27-percentage-point gap between the top and next-highest impact items.

B. Top Priority Transportation Improvements (cont.)

Fisherman's Wharf

- ▶ Improved bicycle/pedestrian crossings of the Embarcadero
- ▶ Increased traffic signage and/or better signalization
- ▶ Enhanced sidewalks/increased street lighting

Northeast Waterfront

- ▶ **Increased ferry or water taxi service**
- ▶ Increased traffic signage and/or better signalization
- ▶ **Increased traffic enforcement/direction**
- ▶ Improved advance traffic alert communications for special events

Ferry Building Area

- ▶ Increased traffic signage and/or better signalization
- ▶ Enhanced sidewalks/increased street lighting
- ▶ Improved bicycle and pedestrian crossings of the Embarcadero

South Beach Extended

- ▶ Improved advance traffic alert communications for special events
- ▶ Increased traffic signage and/or better signalization
- ▶ Enhanced sidewalks/increased street lighting
- ▶ **Increased awareness about availability of nearby parking**

C. Additional Feedback on Transportation Needs and Recommended Improvements

A number of questions provided for open-ended responses and comment. These responses have been incorporated into the survey analysis that follows, and the complete set of verbatim comments are attached as Appendix H.¹⁷ A few concerns and recommendations are highlighted below, to provide a sampling of the comments:

- ▶ Pier 45 tenants indicated delivery/customer/parking access issues.
- ▶ Traffic pinch point at Fisherman's Wharf and nearby intersections; requests for more traffic-control officers.
- ▶ Requests NOT to prioritize a bike lane over traffic lanes.
- ▶ Worker-friendly transit needed from Ferry Building to the north, especially to accommodate evening office hours commutes.
- ▶ Requests for better lighting around Pier 48 and Pier 70.



17. All verbatim comments and contact information provided by respondents were provided to Port staff for review. Comments included in Appendix H are edited only to preserve respondent anonymity.

APPENDIX A PROFILE OF ALL SURVEY RESPONDENTS

This section includes profile information from all survey respondents.

Figure A-1. Usage Types – All Survey Respondents

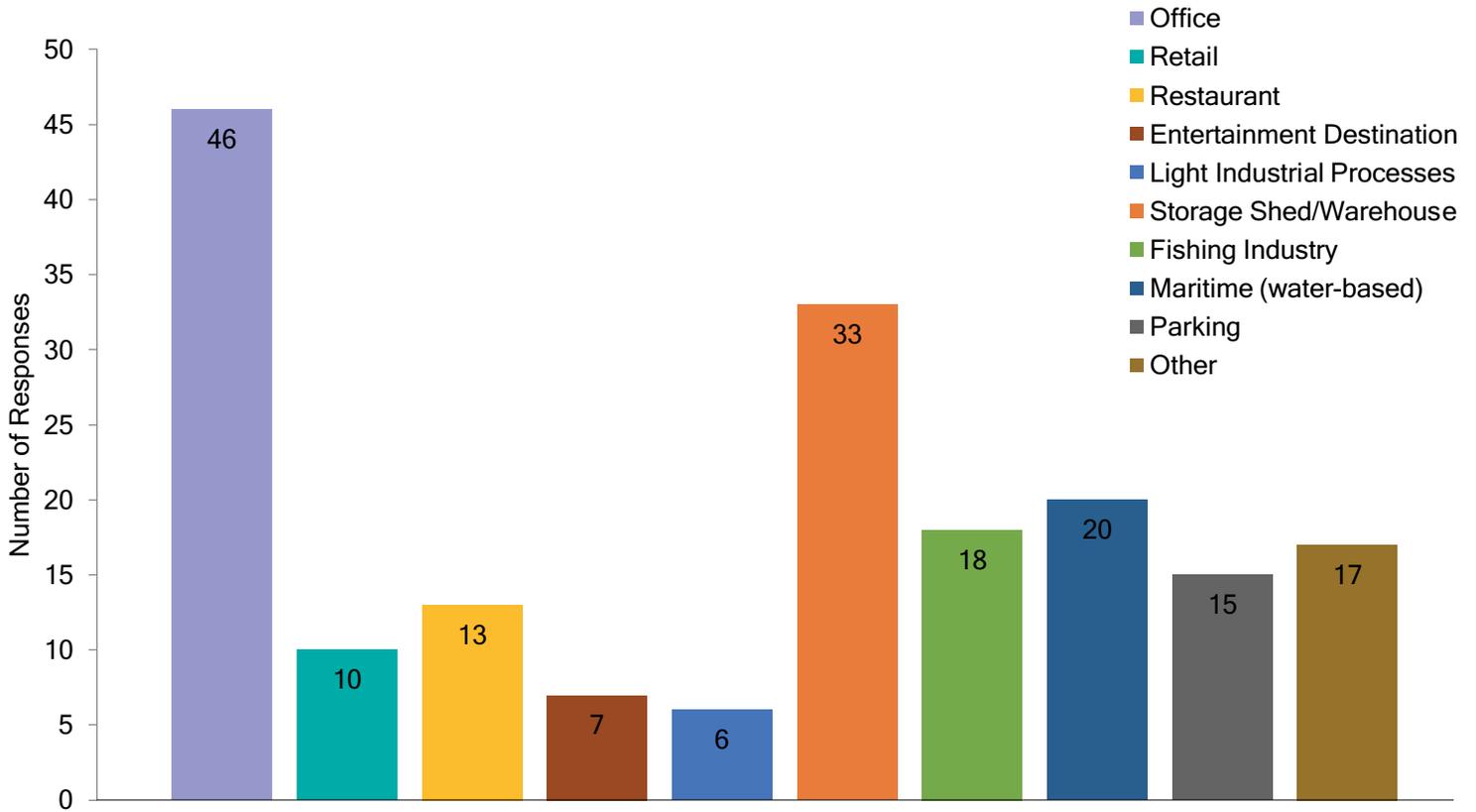
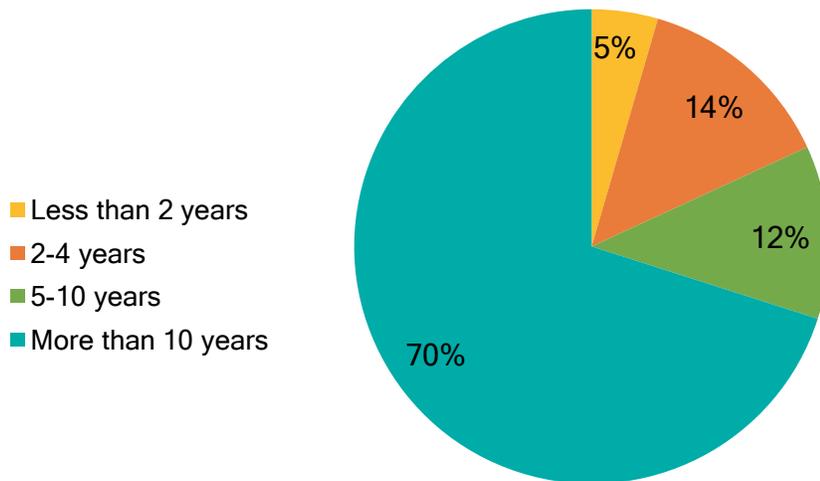


Figure A-2. Tenant Tenure – All Survey Respondents



APPENDIX B FISHERMAN'S WHARF RESPONSE DATA

This appendix contains a complete set of the data for Fisherman's Wharf survey responses, including the charts in the Fisherman's Wharf Survey Analysis section.

Figure B-1. Usage Types – Fisherman's Wharf

Responses in the "Other" category include:

- ▶ Property Management
- ▶ Aquarium

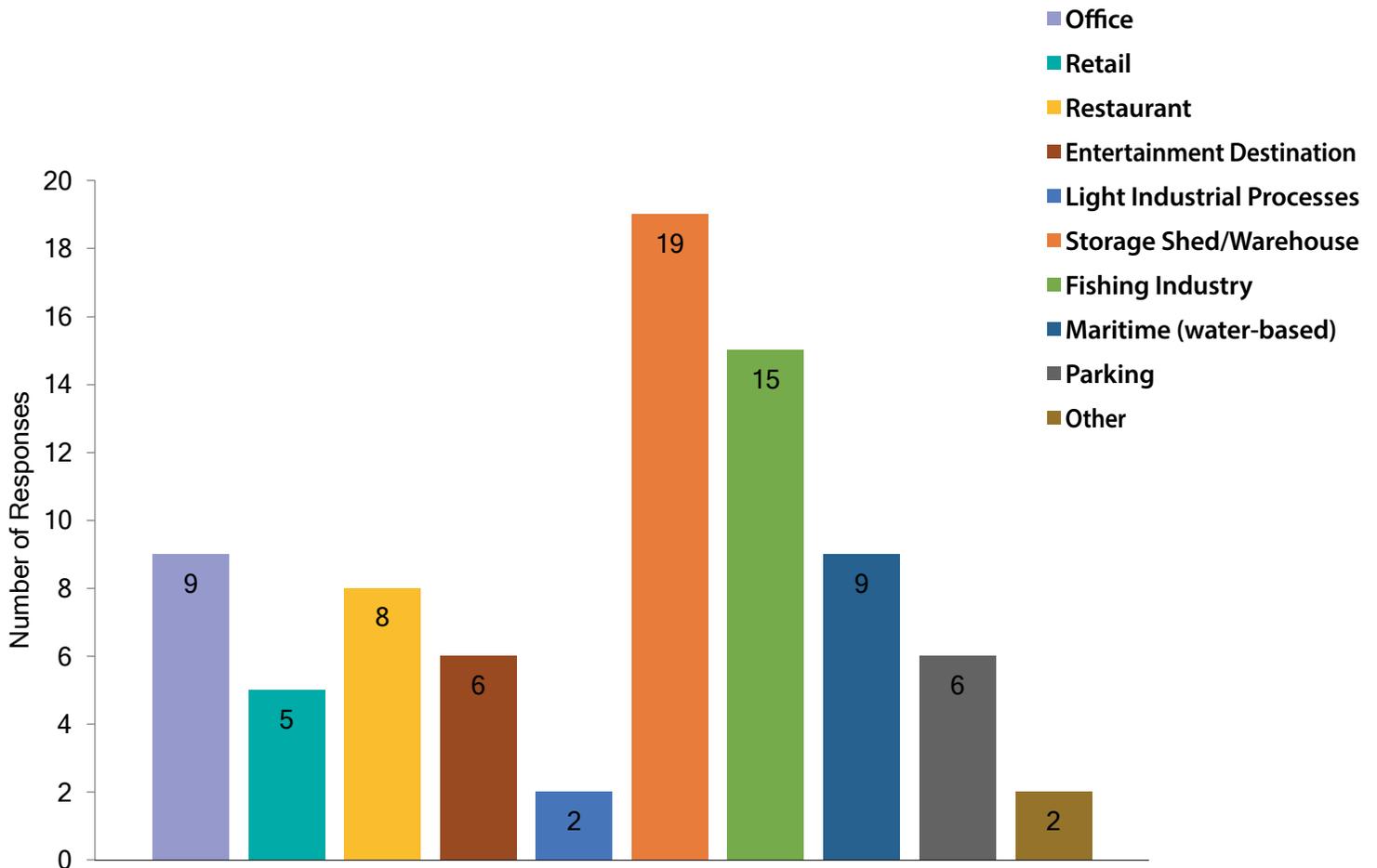
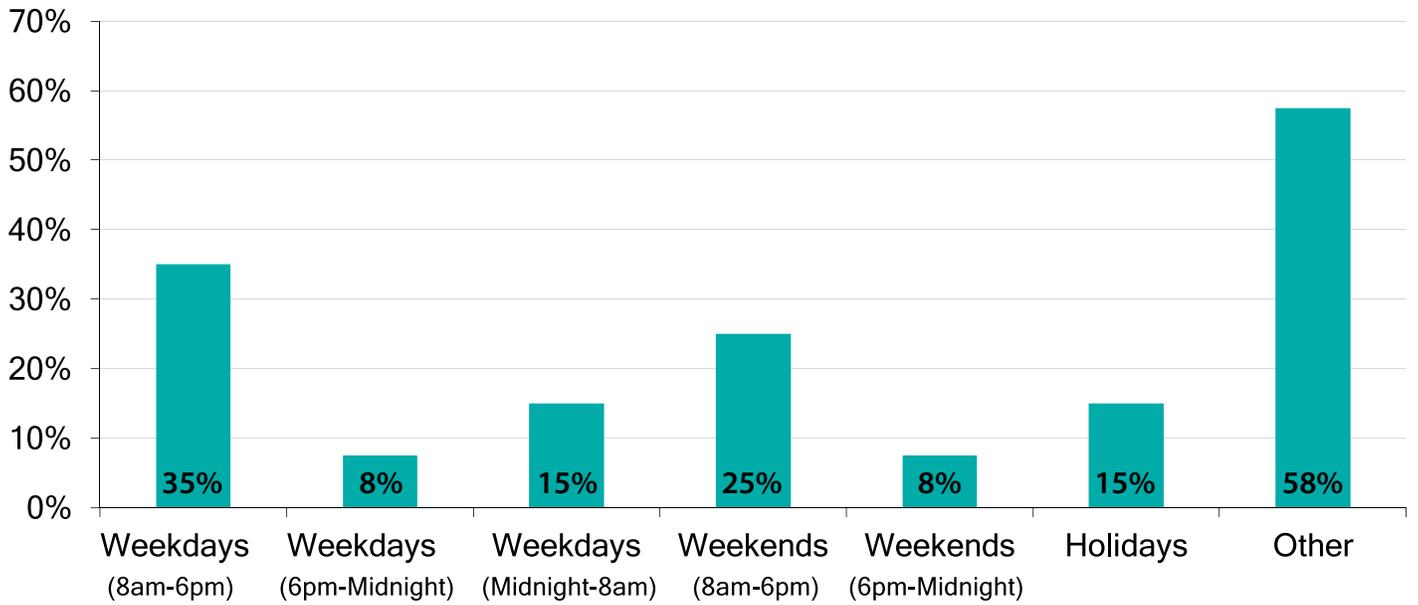


Figure B-2. Hours of Operation – Fisherman’s Wharf



Percentages do not add up to 100 because respondents were allowed to select more than one response.

Responses in the “Other” category include:

- ▶ 10 am – 6 pm
- ▶ 5 am – 3 pm
- ▶ Every day 11 am – 10 pm
- ▶ No regular hours. All and any time
- ▶ 3 am – 12 noon
- ▶ Commercial fishing 5 am – 8 pm during season
- ▶ Depends on season 6 am – midnight
- ▶ Mon-Sat 3 am – 2 pm
- ▶ 2 am – 5 pm
- ▶ 10 am – 6 pm
- ▶ Open at 10 am, close at 8 pm or later
- ▶ 10 am – 7 pm every day
- ▶ 7 days a week flex – 9am – 10pm depending on season
- ▶ Depending on season, we work 24/7
- ▶ 10 am - 7 or 8 pm
- ▶ We operate 24/7 depending on circumstances all year round
- ▶ Open 10 am – 10 pm daily
- ▶ Weekdays 3 am – 12 noon
- ▶ Seven days 11 am – 10 pm
- ▶ Seven days a week 8 am – 11 pm
- ▶ 2 am – 2 pm
- ▶ Open every day 10 am – 8 pm

Figure B-3. Number of Employees – Fisherman’s Wharf

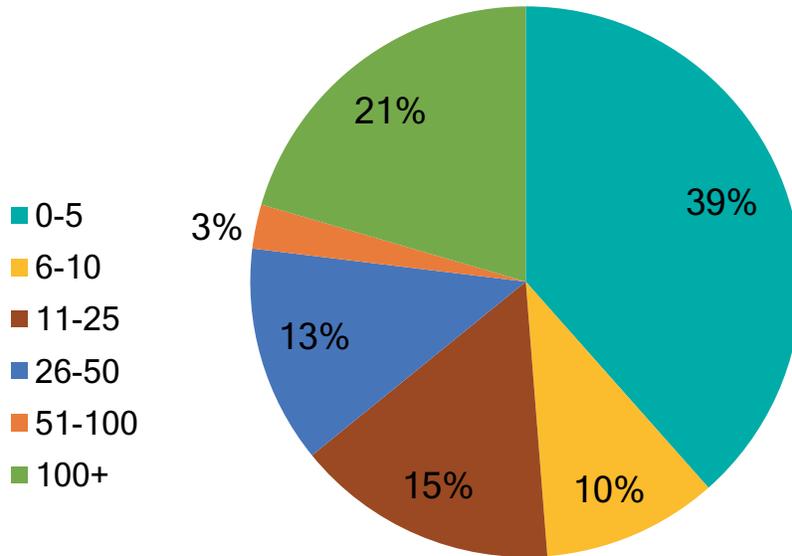


Figure B-4. Transportation Benefits Offered – Fisherman’s Wharf

Percentages do not add to 100 because respondents were asked to select all that apply.

Responses in the “Other” category include:

- ▶ Participate in employee program for pre-tax commuter benefits
- ▶ Commercial fishing needs a truck
- ▶ We sponsor parking for senior management

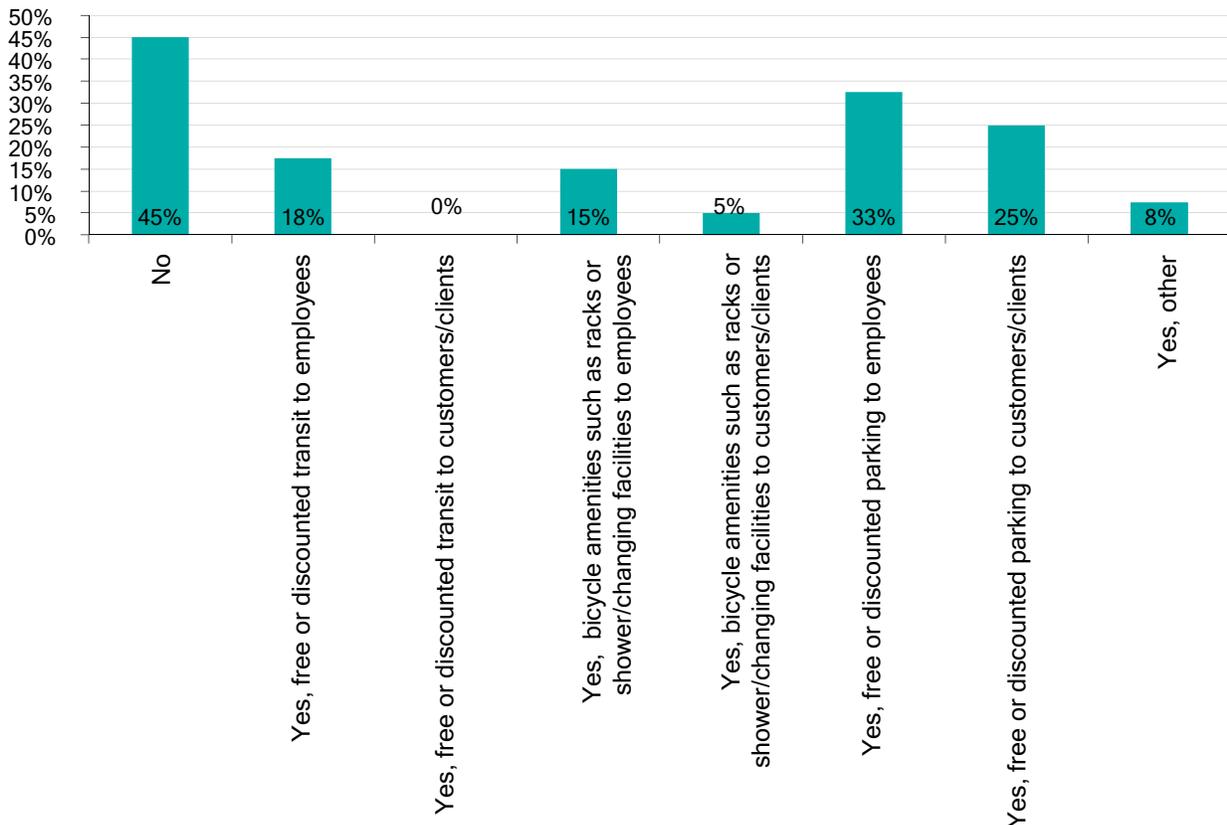


Figure B-5. Employee Commute Areas – Fisherman’s Wharf

Percentages do not add up to 100 because these figures represent averages of estimates across all responses.

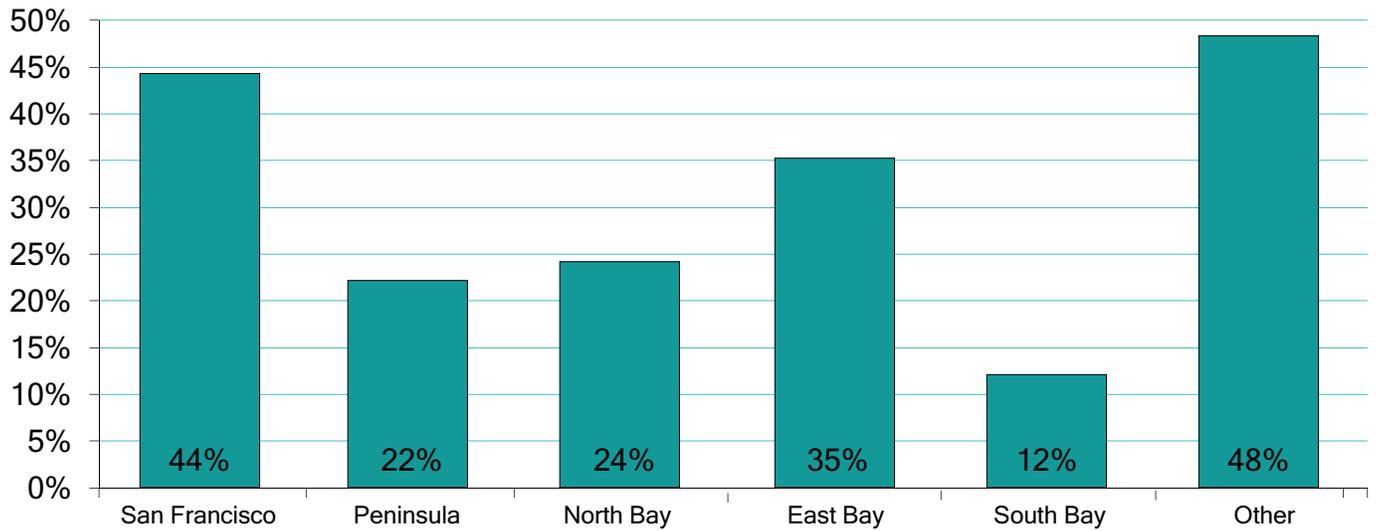


Figure B-6. Employee Transportation Modes – Fisherman’s Wharf

Percentages do not add up to 100 because these figures represent averages of estimates across all responses.

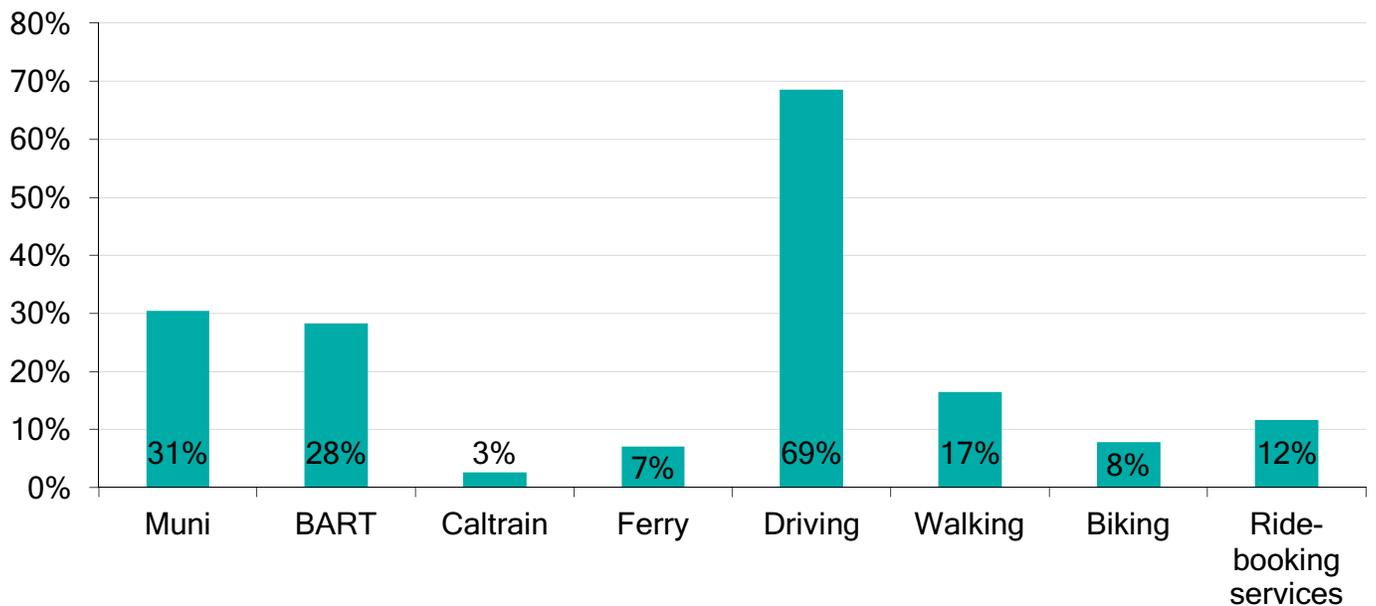


Figure B-7. Rating of Transportation Services for Employees – Fisherman’s Wharf

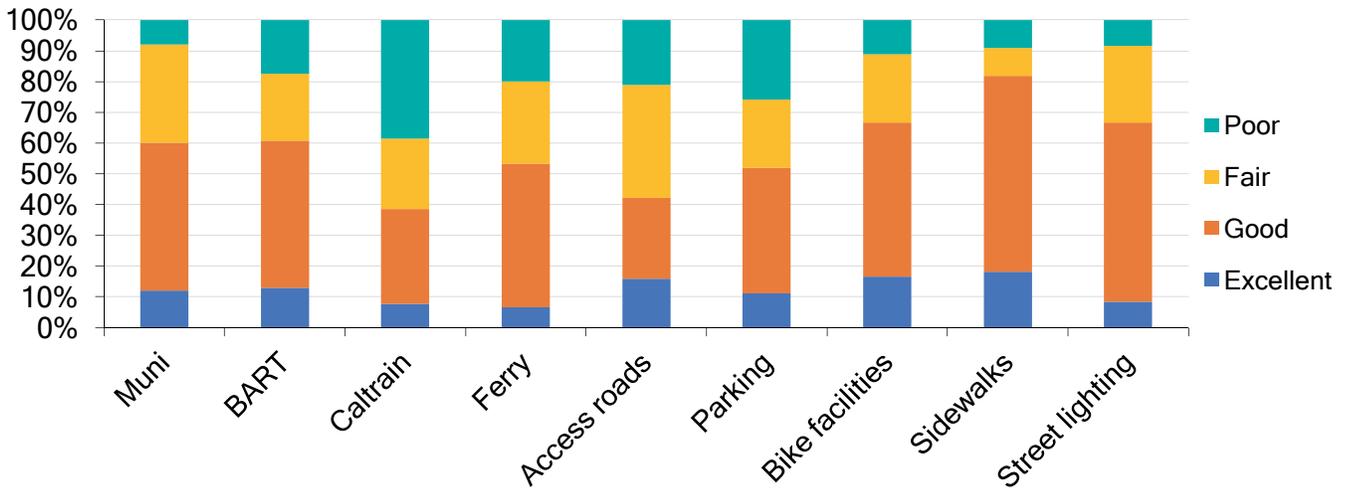


Figure B-8. Customer Travel Areas – Fisherman’s Wharf

Percentages do not add up to 100 because these figures represent averages of estimates across all responses.

Responses in the “Other” category include:

- ▶ Not available/Unknown or None (multiple responses)
- ▶ National and international travel
- ▶ From every direction – Reno to Los Angeles and in between
- ▶ From all over in equal proportions
- ▶ Tourists/Visitors to the Bay Area (multiple responses)
- ▶ Southern California
- ▶ Mostly the tourist trade – out of town, out of state, and many from out of the country

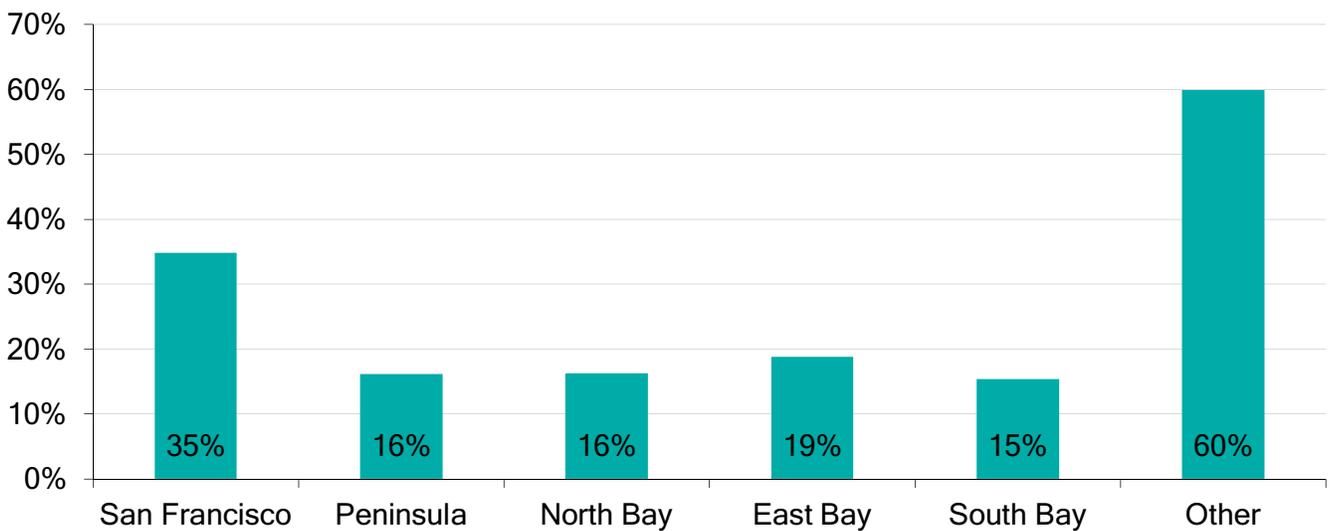


Figure B-9. Customer Transportation Services Used – Fisherman’s Wharf

Percentages do not add up to 100 because these figures represent averages of estimates across all responses.

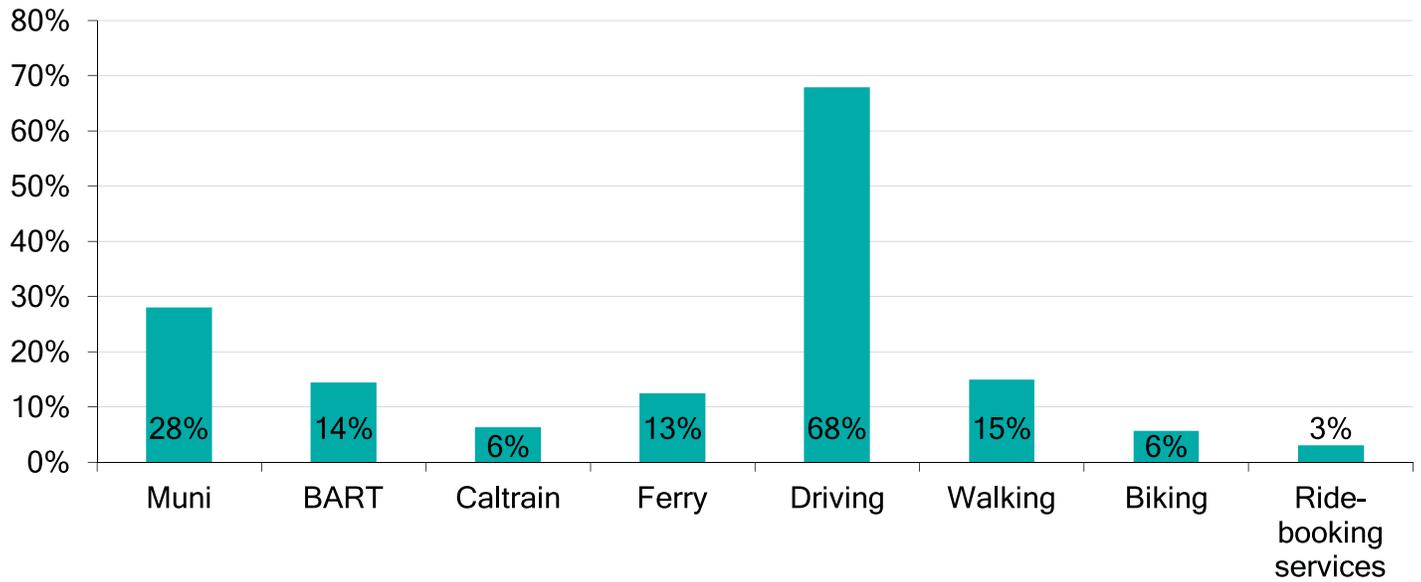


Figure B-10. Ratings of Transportation Services for Customers – Fisherman’s Wharf

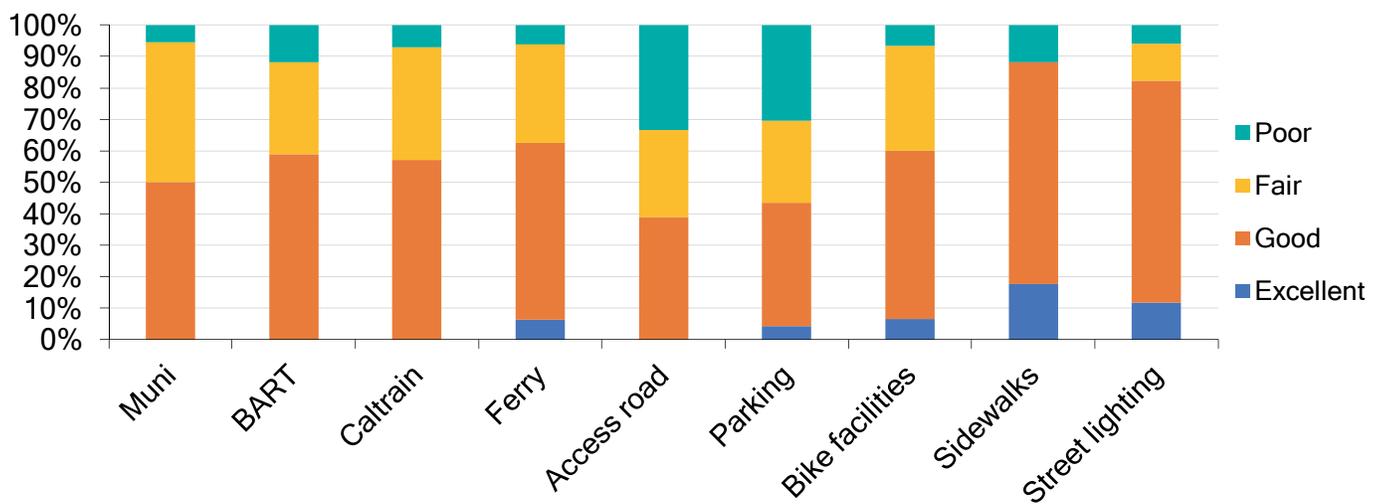


Figure B-11. Number of Weekly Deliveries – Fisherman’s Wharf

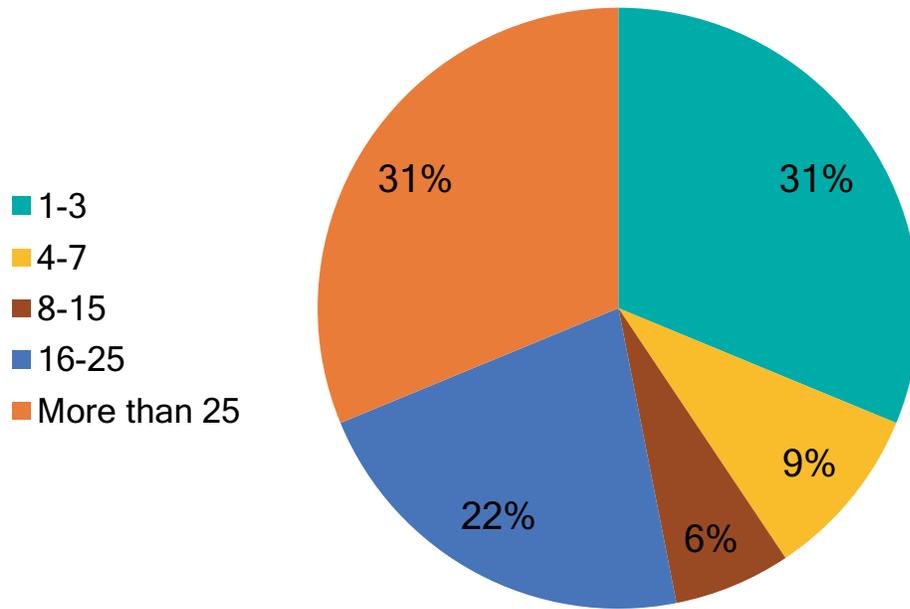


Figure B-12. Timing of Deliveries – Fisherman’s Wharf

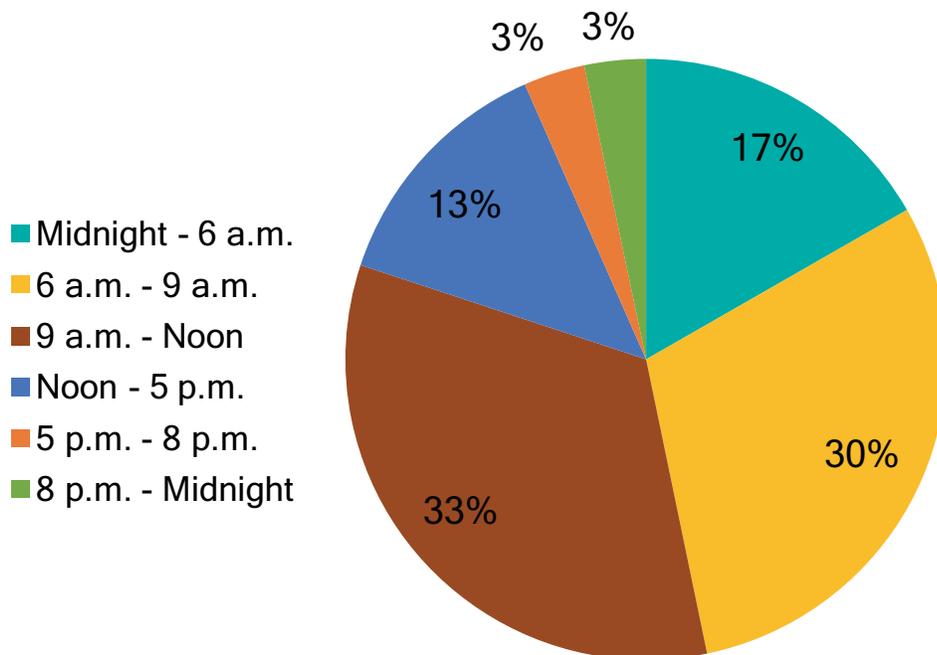


Figure B-13. Delivery Access Needs – Fisherman’s Wharf

Percentages do not add to 100 because respondents were asked to select all that apply.

Responses in the “Other” category include:

- ▶ Water access
- ▶ All of the above

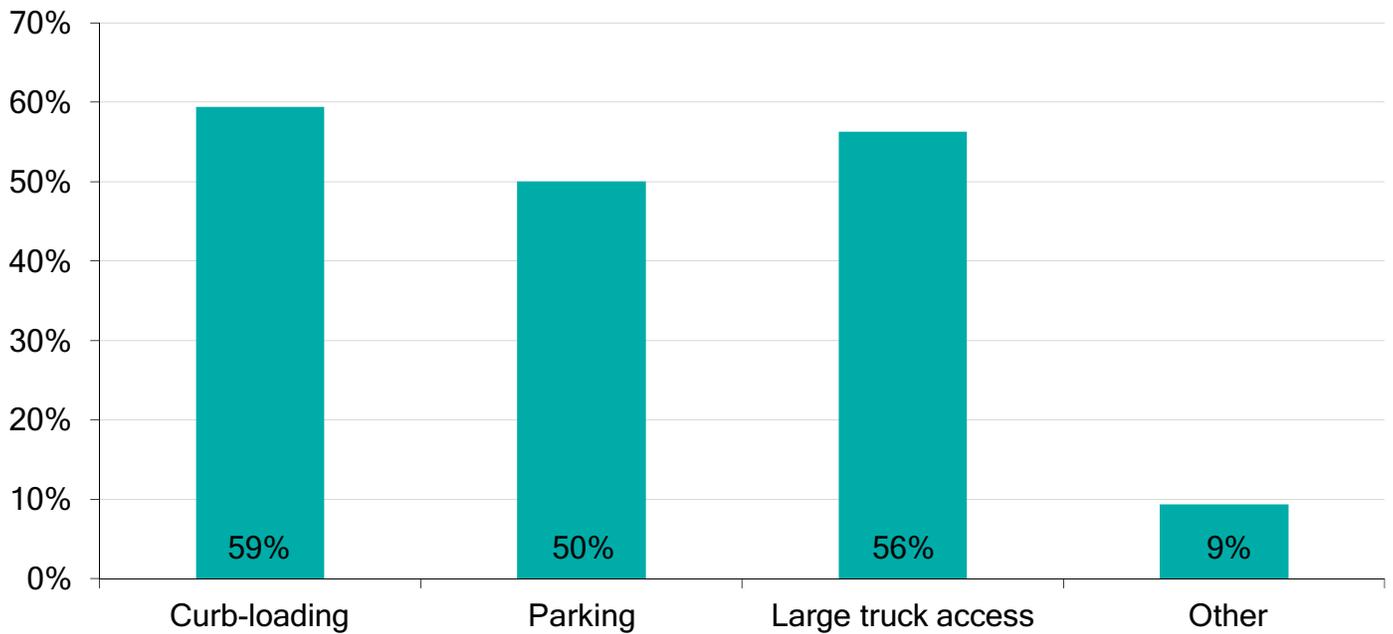


Figure B-14. Impact of Transportation Issues – Fisherman’s Wharf

The degree of impact was determined by combining “Greatly Impacts” and “Impacts” responses.

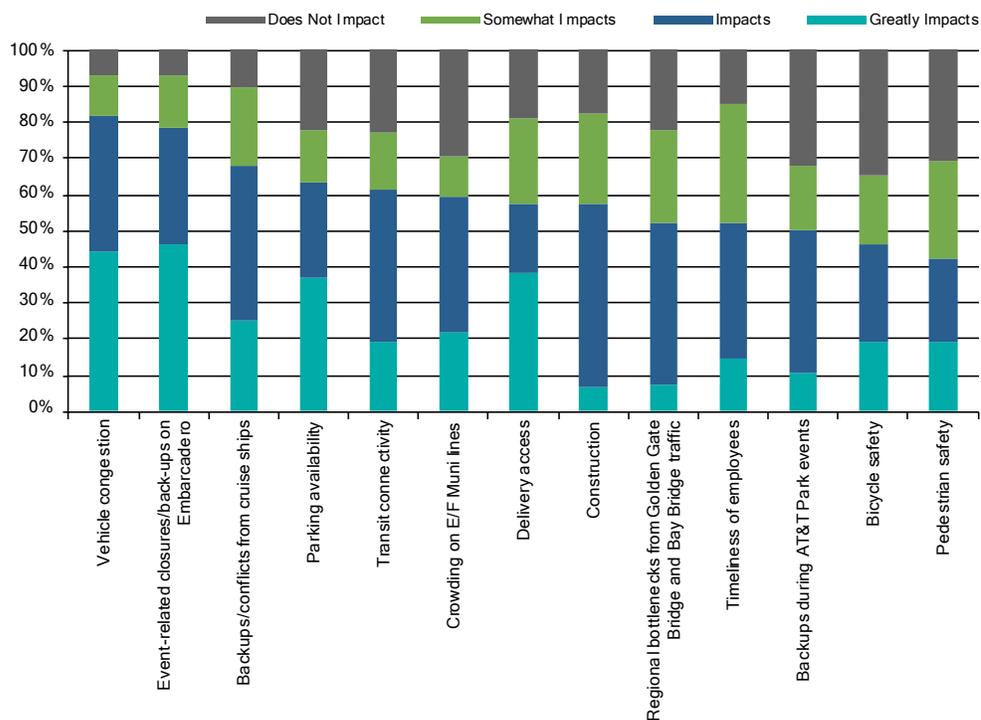


Figure B-15. Satisfaction with Advance Notice of Events – Fisherman’s Wharf

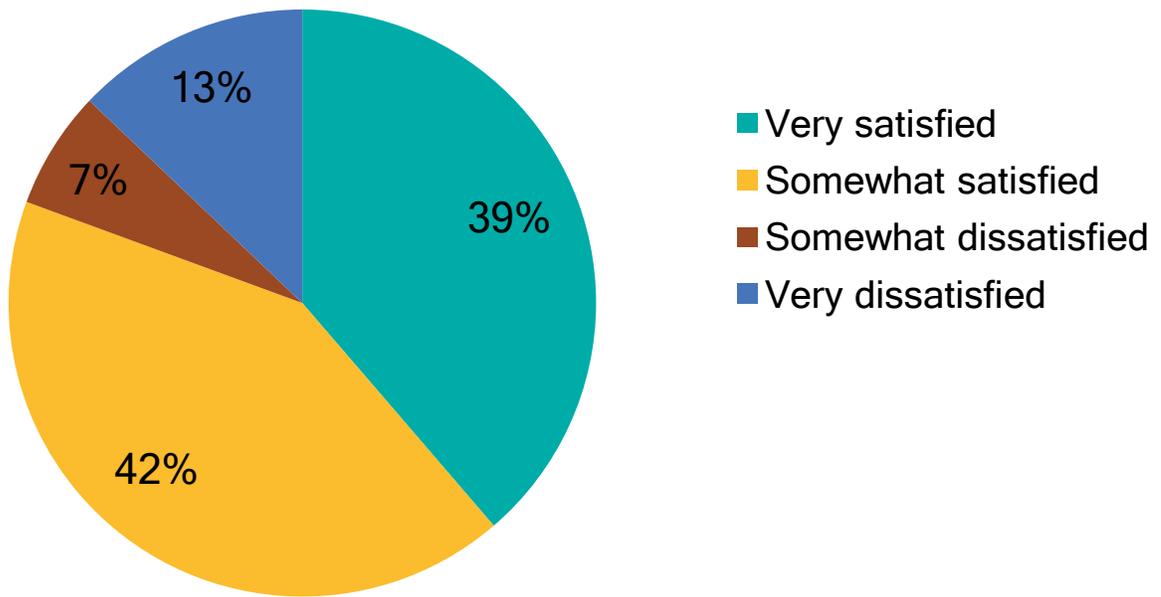
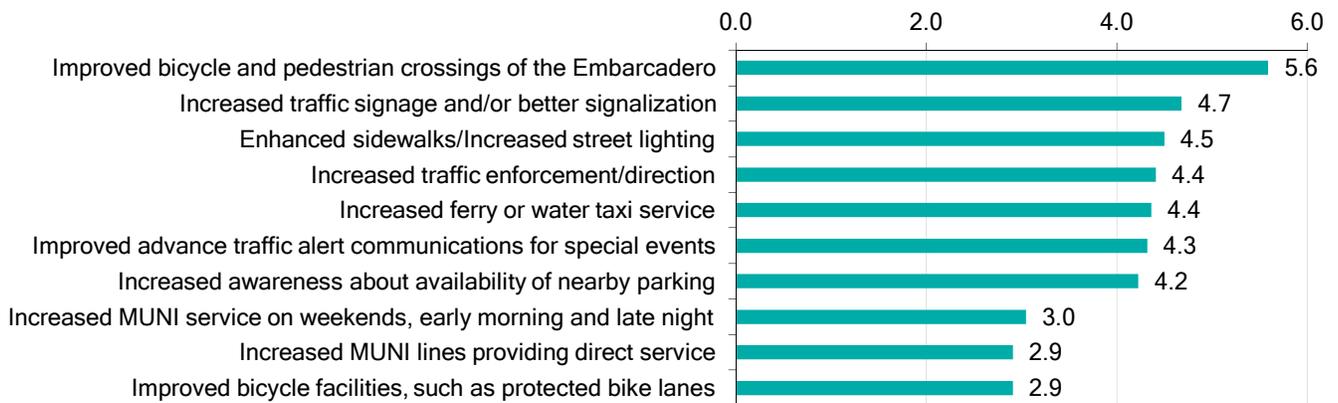


Figure B-16. Prioritization of Improvement Projects – Fisherman’s Wharf



APPENDIX C **NORTHEAST WATERFRONT** RESPONSE DATA

This appendix contains a complete set of the data for Northeast Waterfront survey responses, including the charts in the Northeast Waterfront Survey Analysis section.

Figure C-1. Usage Types – Northeast Waterfront

Responses in the “Other” category include:

- ▶ Pier 27 & 35 – Cruise Terminal
- ▶ Office and Storage
- ▶ Special Events

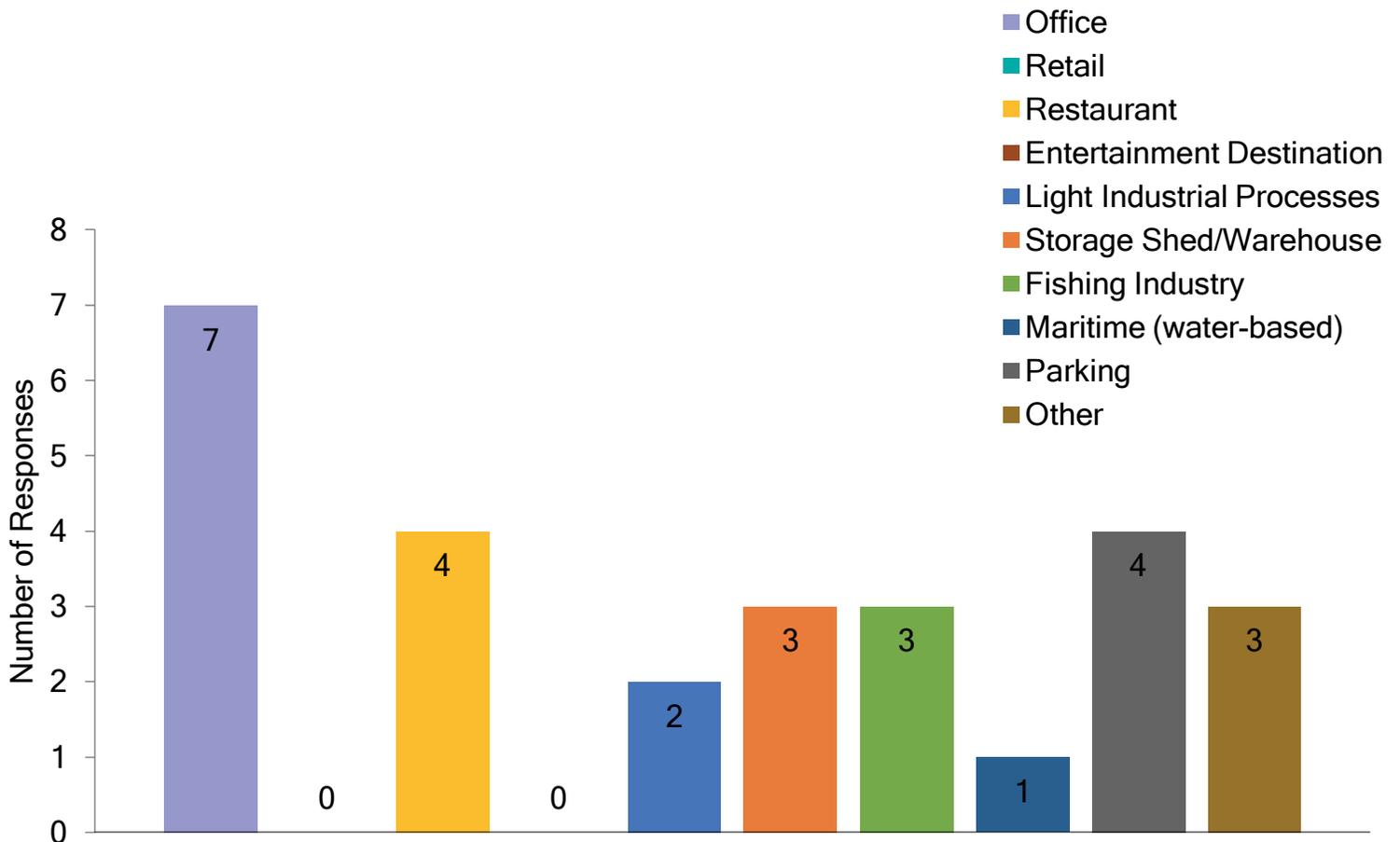


Figure C-2. Hours of Operation – Northeast Waterfront

Percentages do not add to 100 because respondents were asked to select all that apply.

Responses in the “Other” category include:

- ▶ Depends on cruise schedule
- ▶ 11:30 AM – 10:00 PM
- ▶ Daily 3:00 AM – 12:00 PM

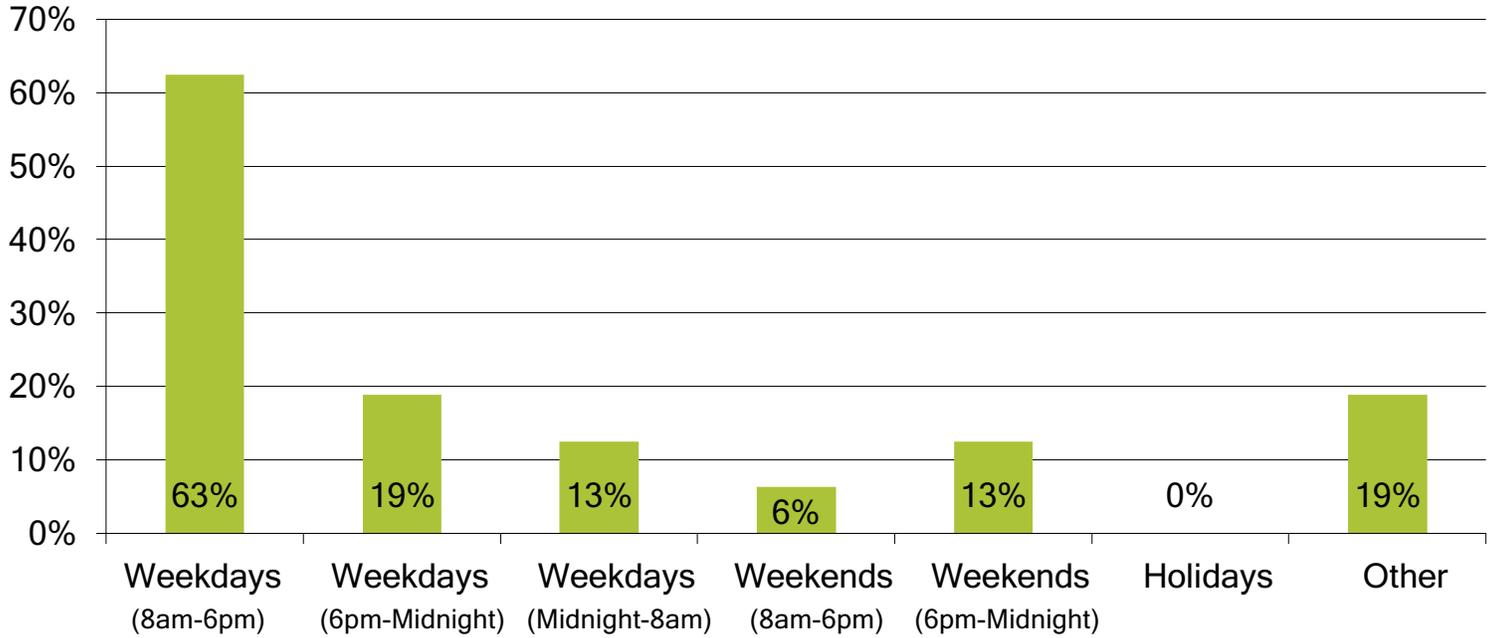


Figure C-3. Number of Employees – Northeast Waterfront

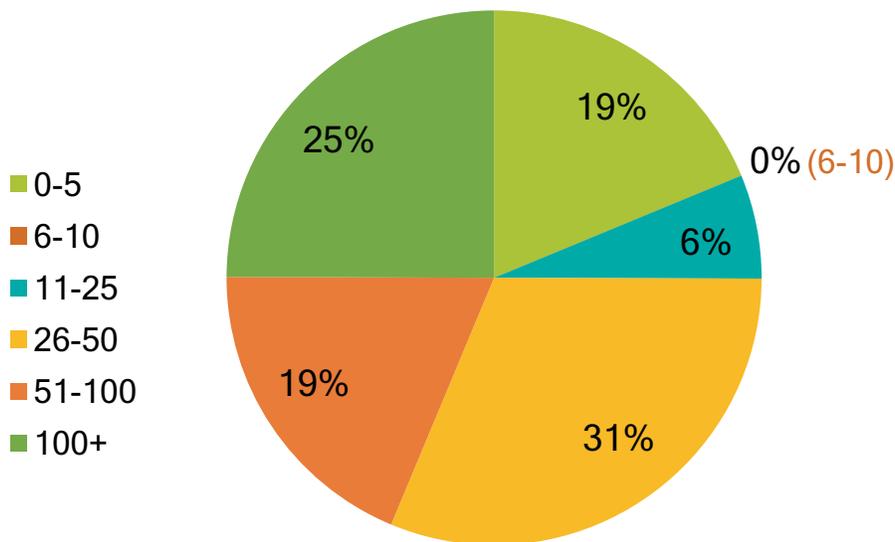


Figure C-4. Transportation Benefits Offered – Northeast Waterfront

Percentages do not add up to 100 because respondents were asked to select all that apply. Responses in the “Other” category include:

- ▶ Pre-tax commuter “checks”

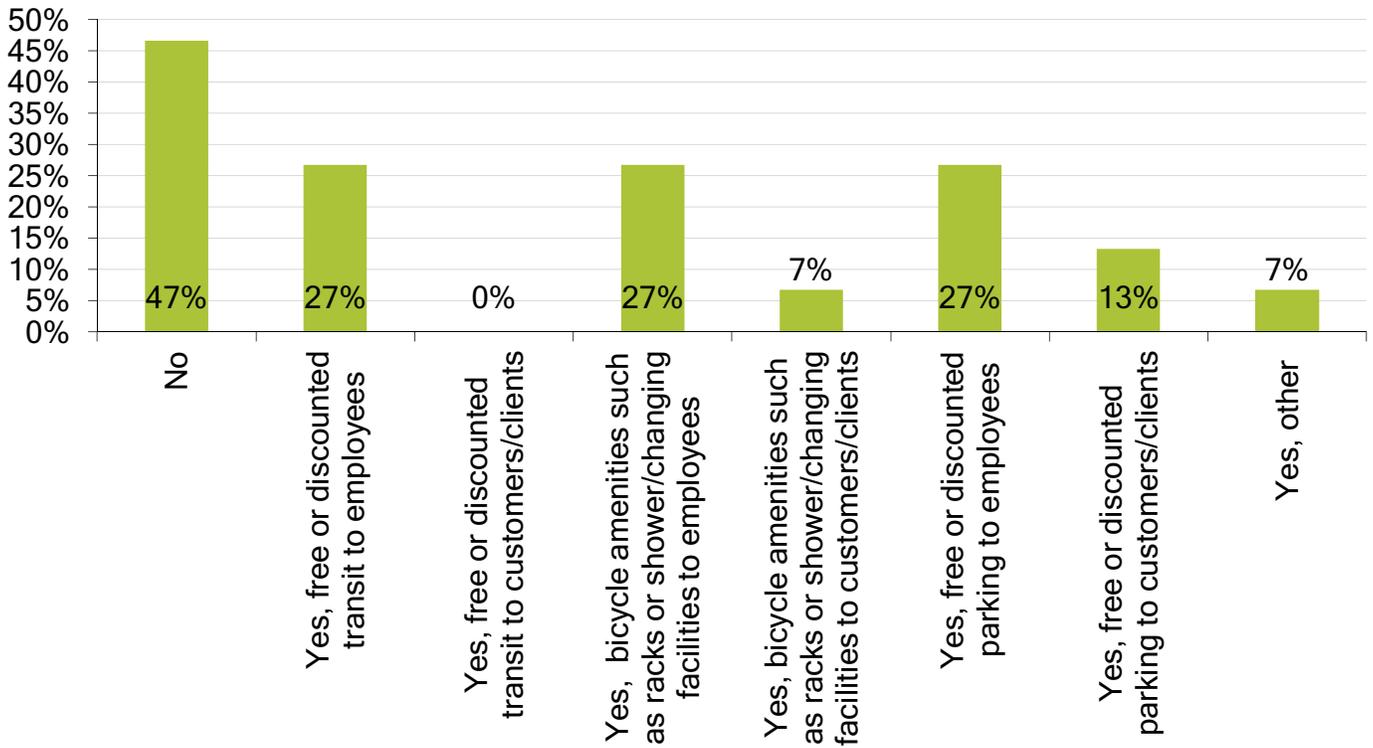


Figure C-5. Employee Commute Areas – Northeast Waterfront

Percentages do not add up to 100 because these figures represent averages of estimates across all responses. Responses in the “Other” category include: Beyond the Bay Area

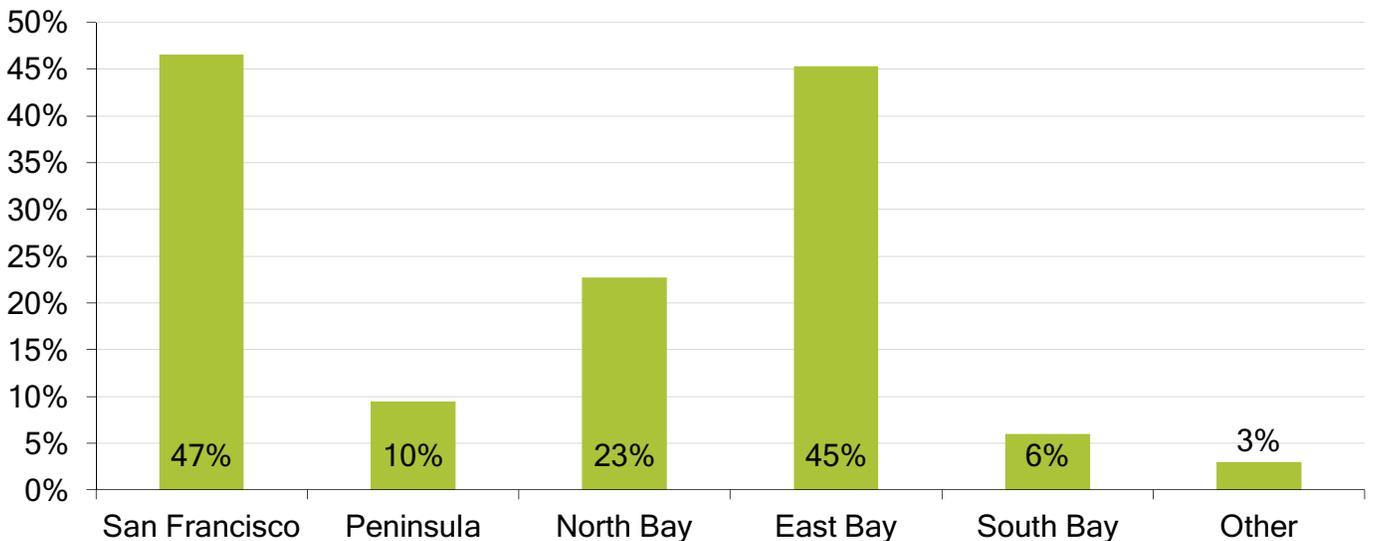


Figure C-6. Employee Transportation Modes – Northeast Waterfront

Percentages do not add up to 100 because these figures represent averages of estimates across all responses.

Responses in the “Other” category include:

- ▶ Golden Gate Transit
- ▶ Using multiple modes, such as BART to the Ferry Building then walking

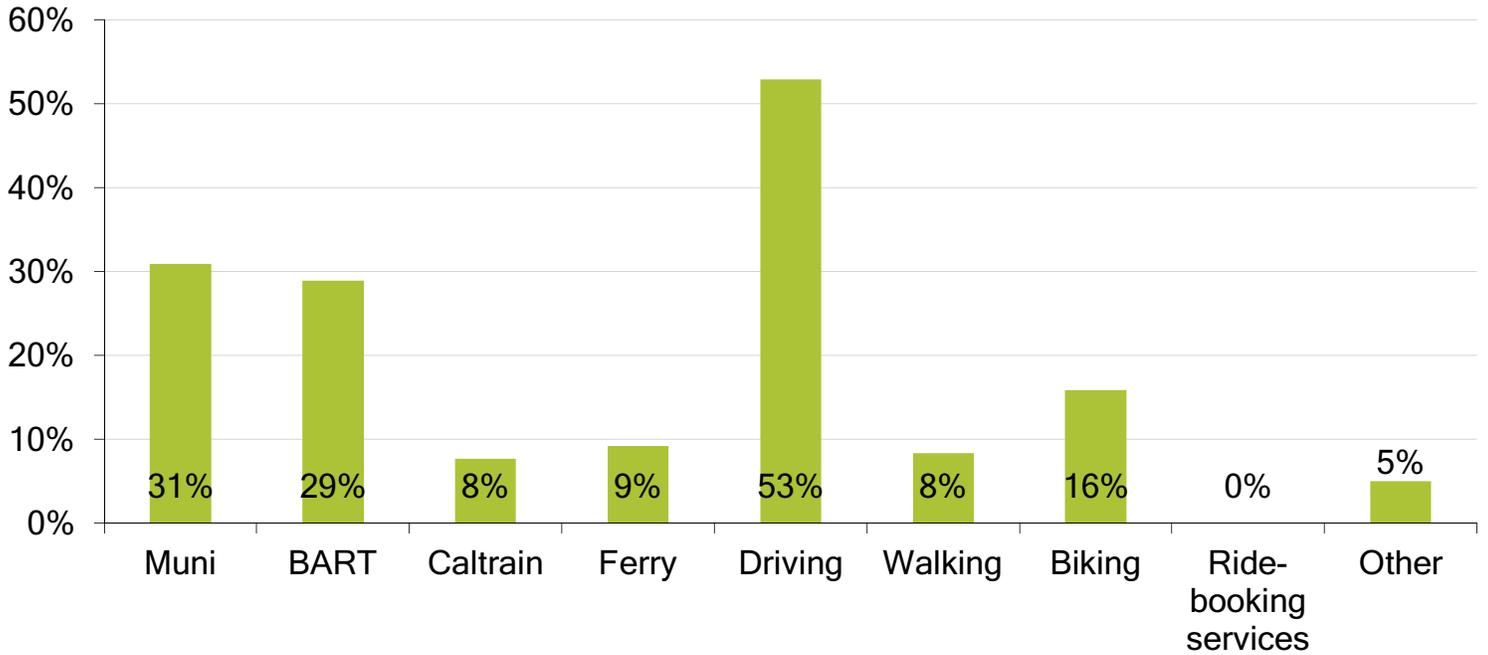


Figure C-7. Rating of Transportation Services for Employees – Northeast Waterfront

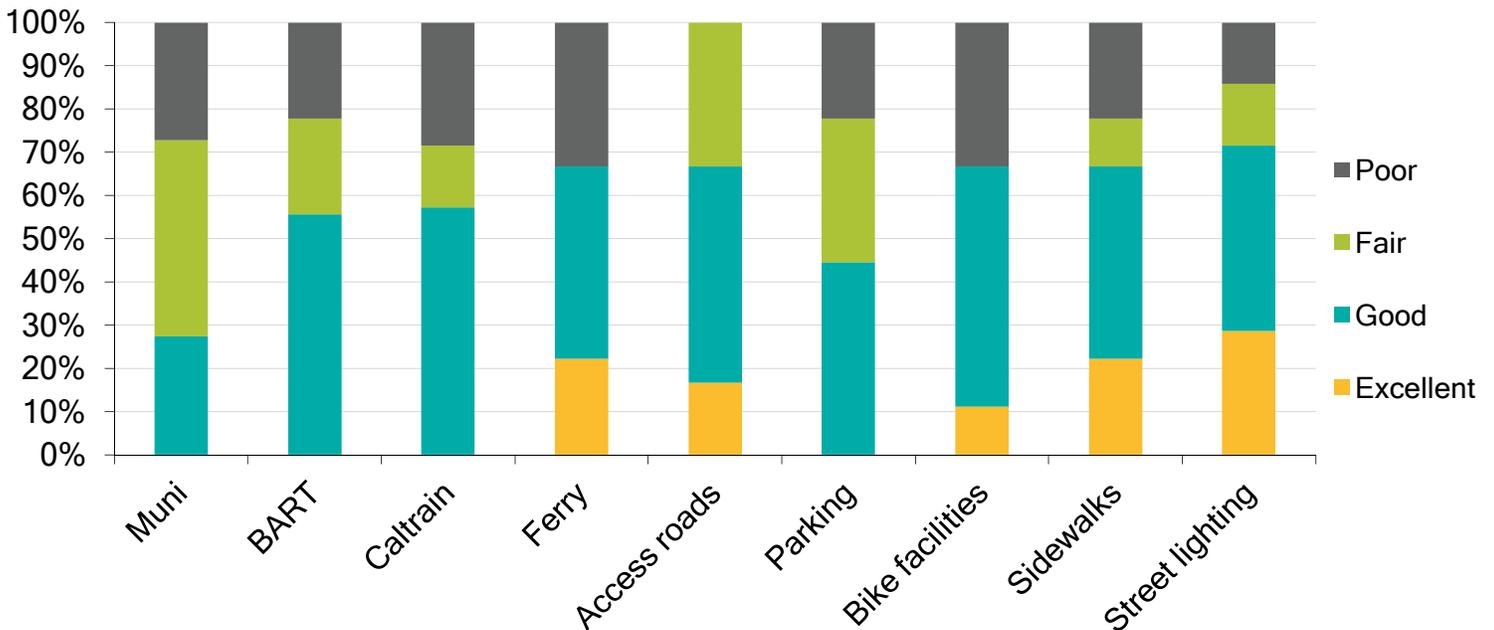


Figure C-8. Customer Travel Locations – Northeast Waterfront

Percentages do not add up to 100 because these figures represent averages of estimates across all responses. Responses in the “Other” category include:

- ▶ Outside the Bay Area (multiple)
- ▶ Out of state, Sacramento, Santa Cruz, Los Angeles
- ▶ We have very few clients come to our office, but we travel to client sites regularly. Generally, within SF we walk or use taxi, Uber or public transit. For clients outside of SF we use Zipcar.
- ▶ All delivery
- ▶ Infrequent or None

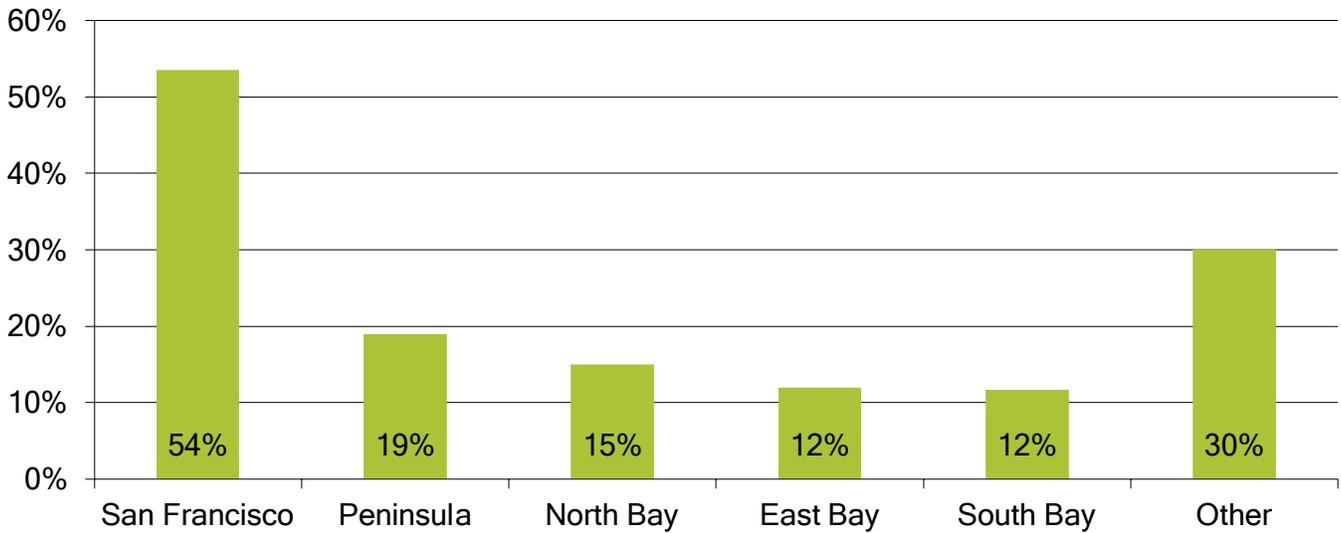


Figure C-9. Customer Transportation Service Usage – Northeast Waterfront

Percentages do not add up to 100 because these figures represent averages of estimates across all responses. Responses in the “Other” category include:

- ▶ Flights/SFO

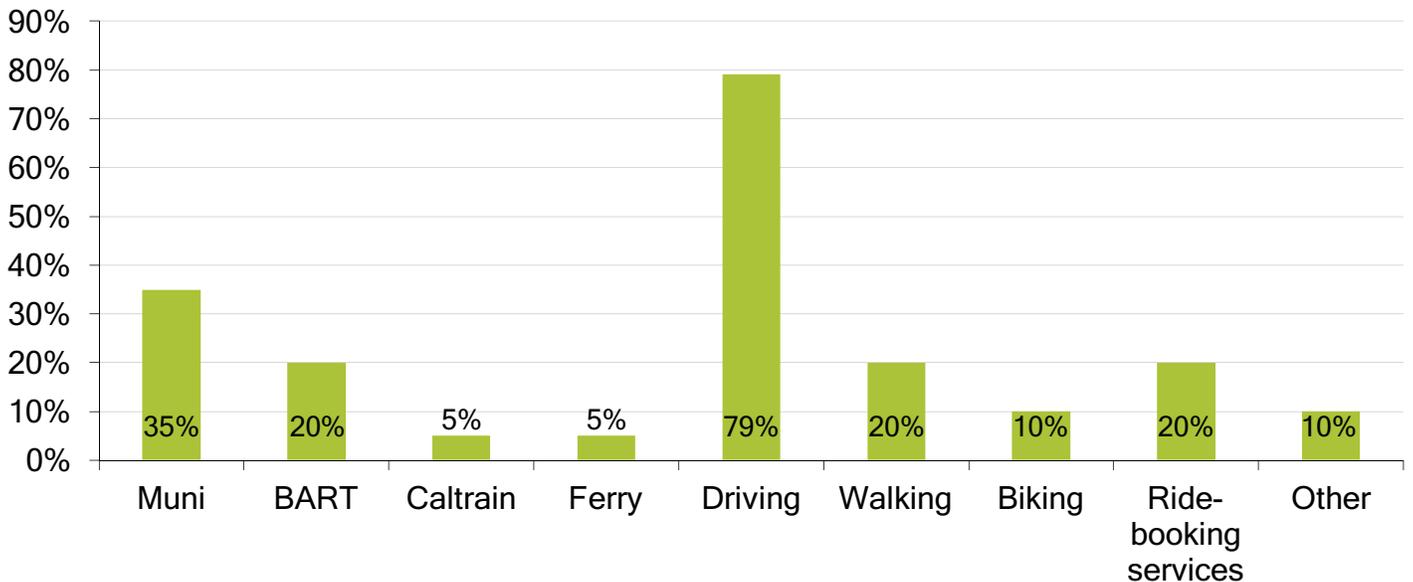


Figure C-10. Ratings of Transportation Services for Customers – Northeast Waterfront

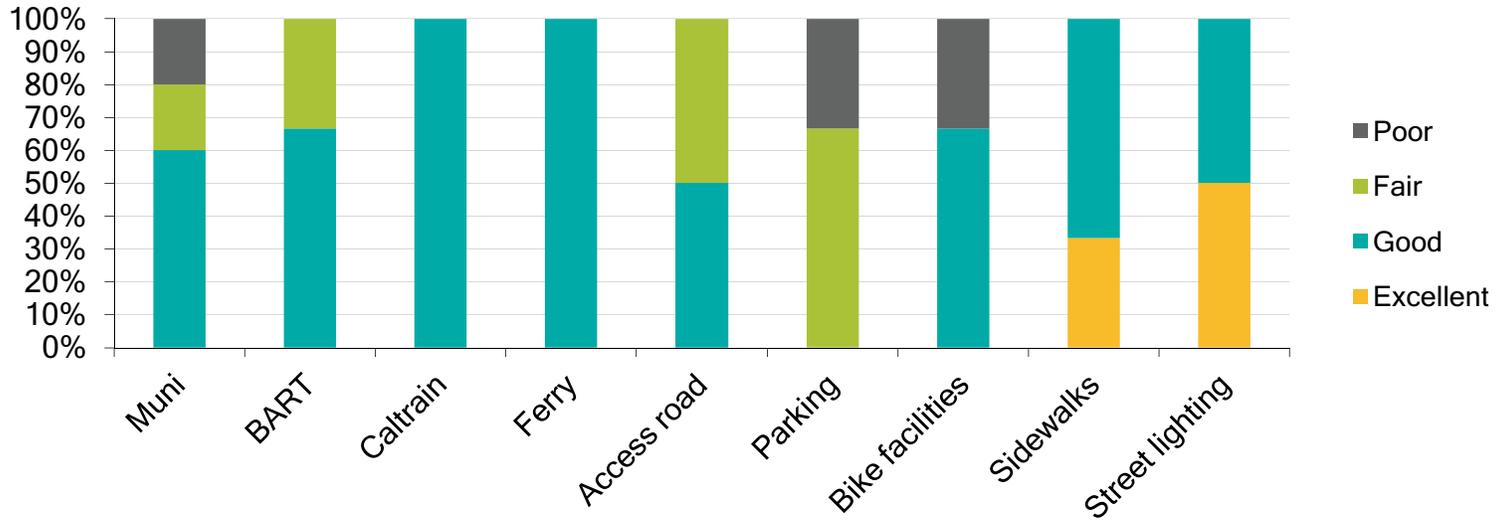


Figure C-11. Number of Weekly Deliveries – Northeast Waterfront

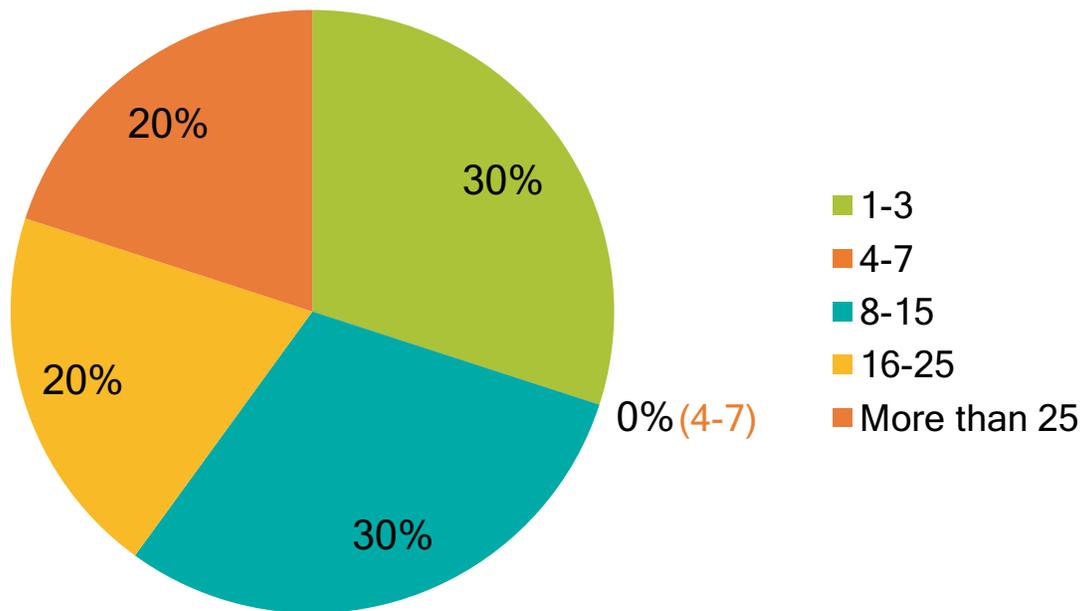


Figure C-12. Timing of Deliveries – Northeast Waterfront

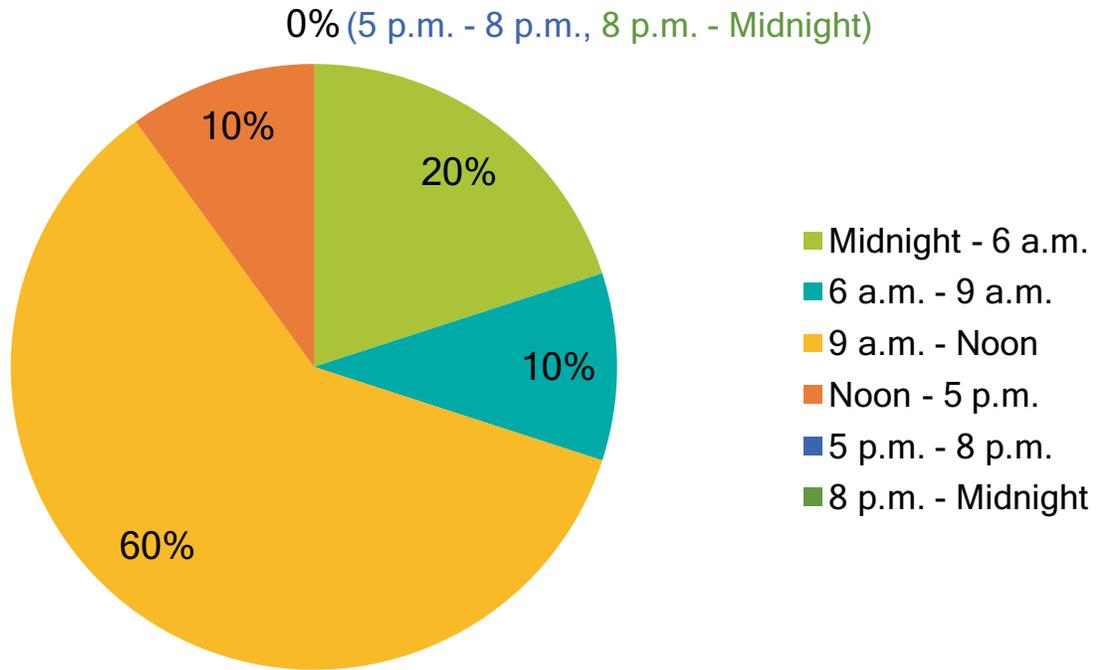


Figure C-13. Delivery Access Needs – Northeast Waterfront

Percentages do not add up to 100 because respondents were asked to select all that apply.

Responses in the “Other” category include:

- ▶ On-Trac, FedEx, UPS, messenger
- ▶ Not really needed for our business

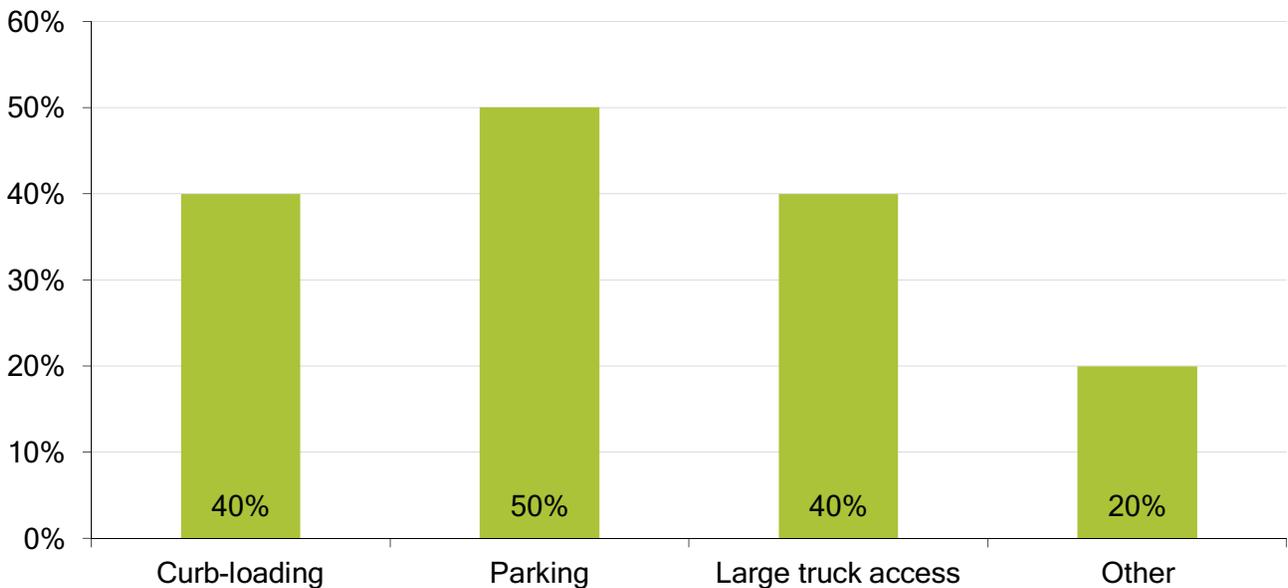


Figure C-14. Impact of Transportation Issues – Northeast Waterfront

The degree of impact was determined by combining “Greatly Impacts” and “Impacts” responses

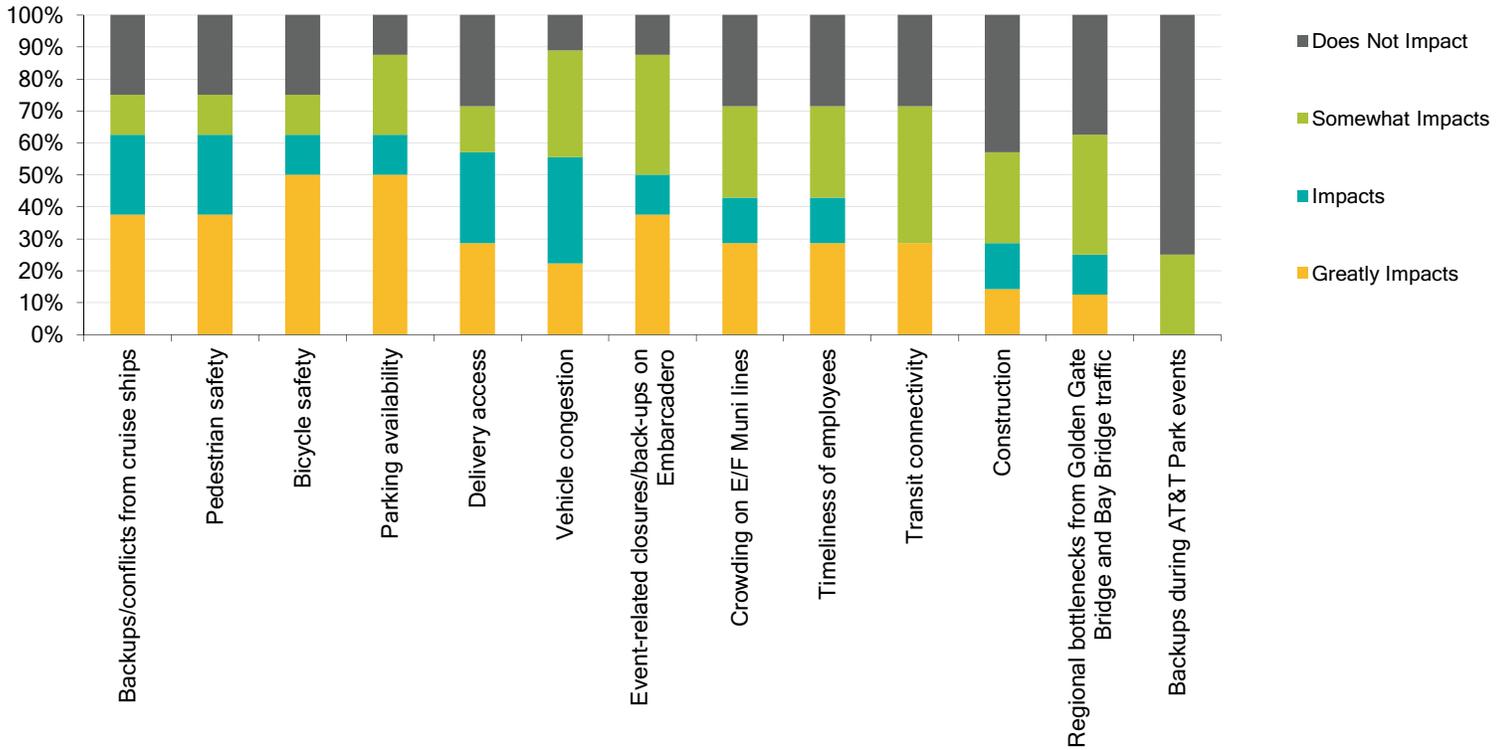


Figure C-15. Satisfaction with Advance Notice of Events – Northeast Waterfront

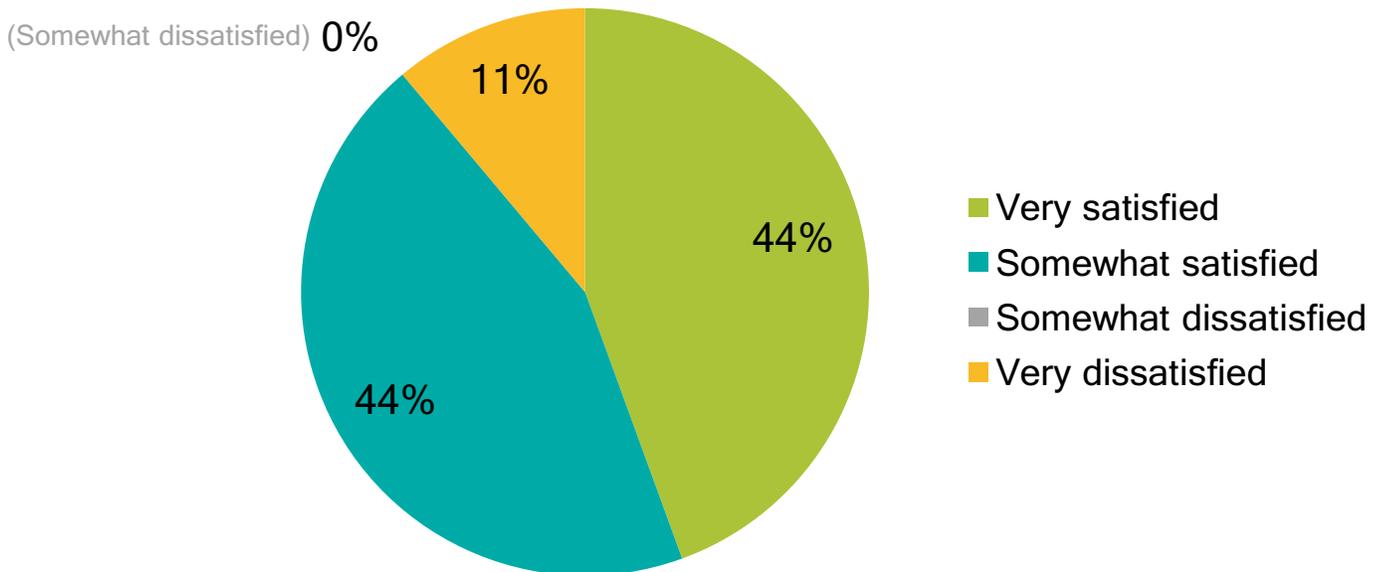
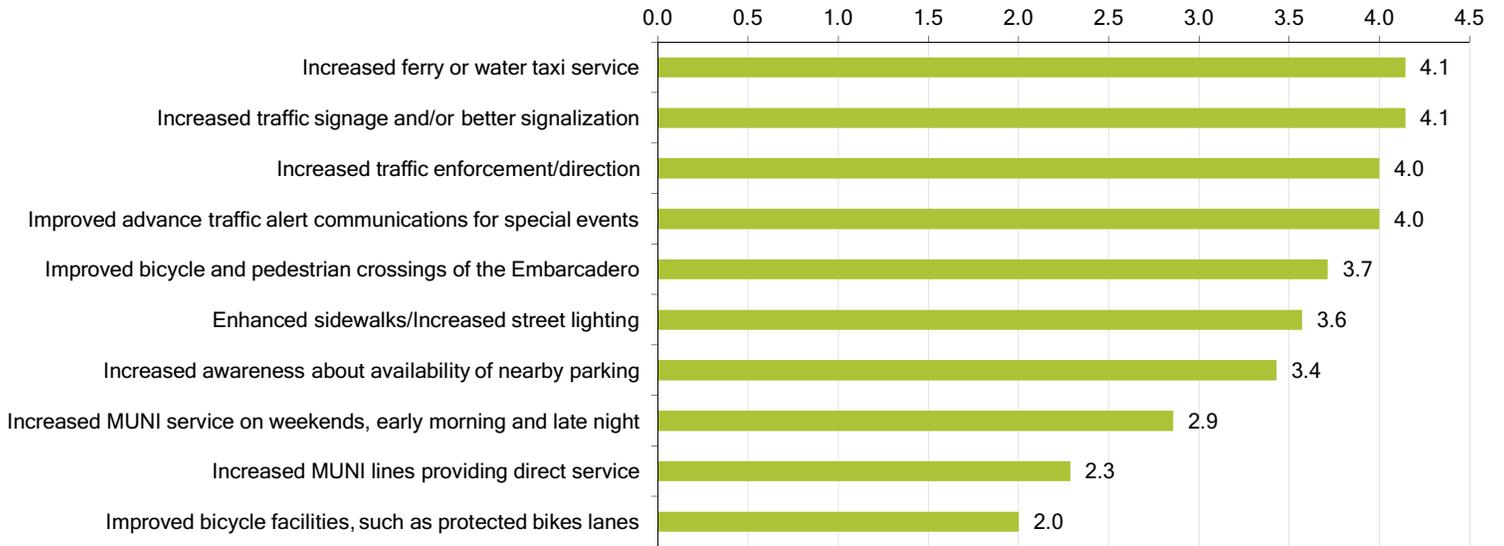


Figure C-16. Prioritization of Improvement Projects – Northeast Waterfront



APPENDIX D FERRY BUILDING AREA RESPONSE DATA

This appendix contains a complete set of the data for Ferry Building Area survey responses, including the charts in the Ferry Building Area Survey Analysis section.

Figure D-1. Usage Types – Ferry Building Area

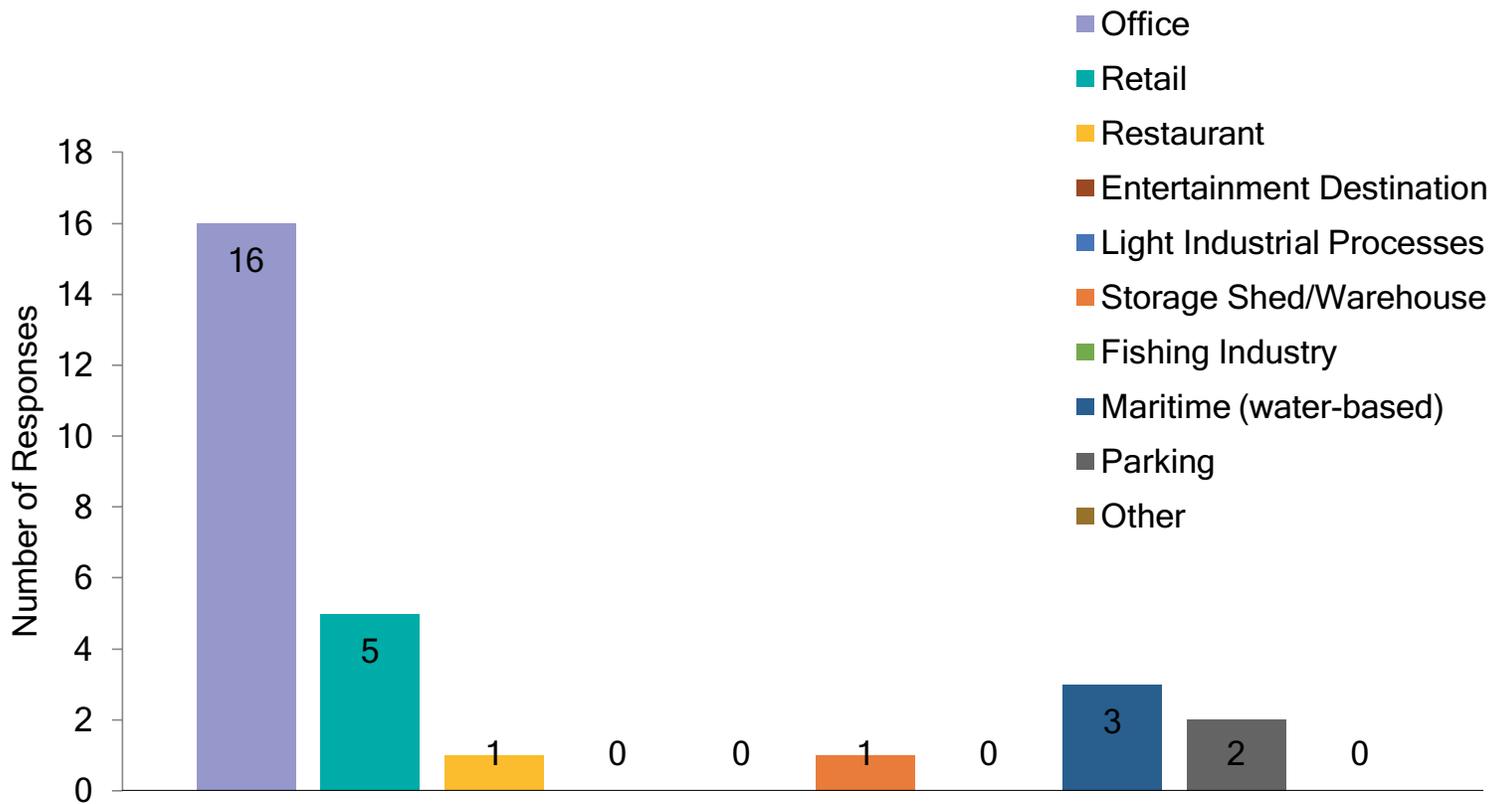


Figure D-2. Primary Hours of Operation – Ferry Building Area

Percentages do not add up to 100, because respondents were allowed to select more than one response.

Other responses:

- ▶ Mon-Sun, 10am-9pm
- ▶ 7 days a week, 6am-10pm
- ▶ 7 days a week, 7am-7pm

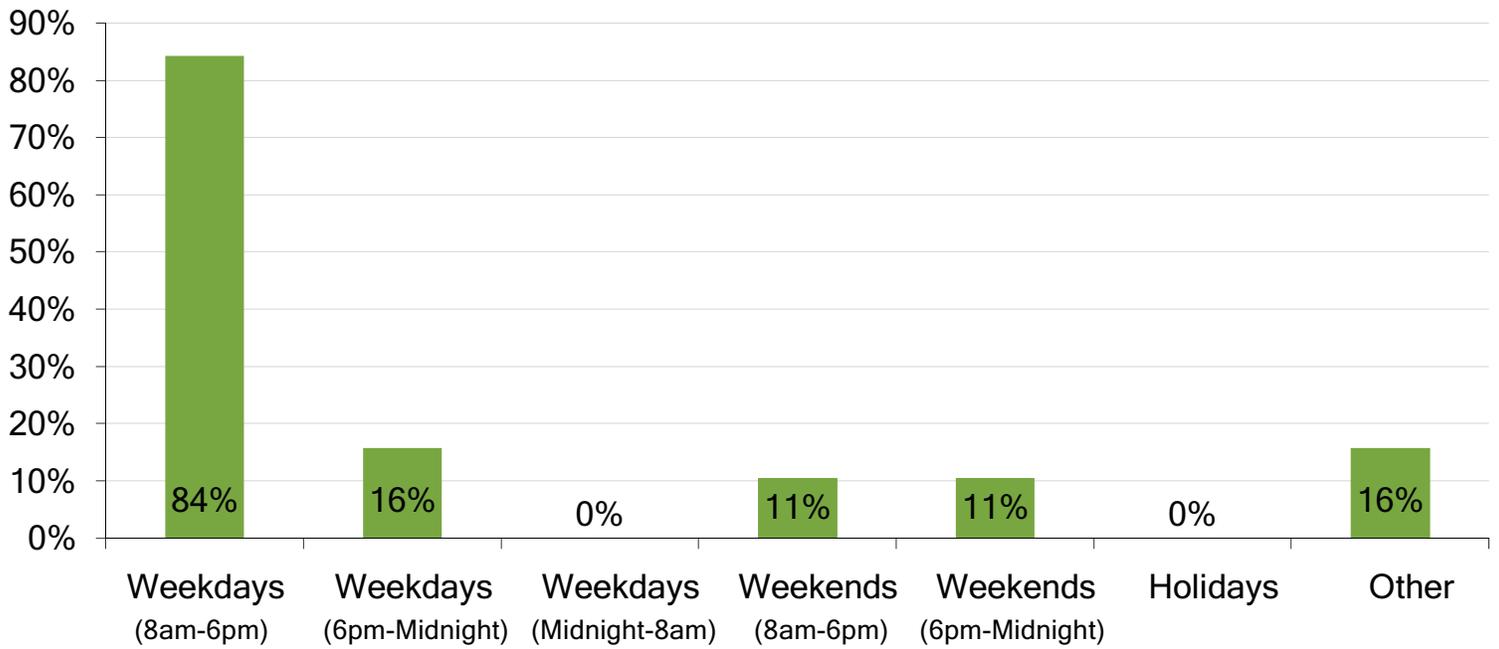


Figure D-3. Number of Employees– Ferry Building Area

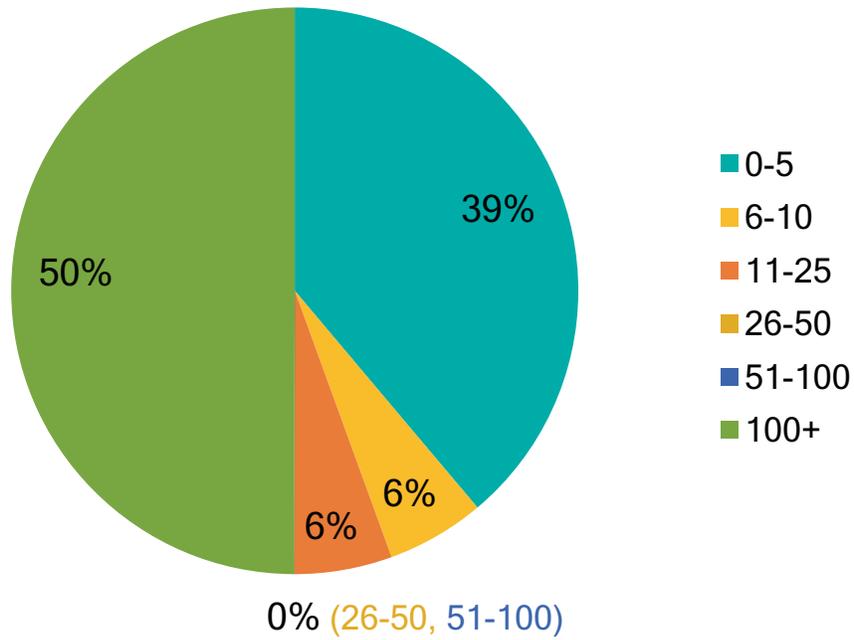


Figure D-4. Transportation Benefits Offered – Ferry Building Area

Percentages do not add to 100 because respondents were asked to select all that apply.

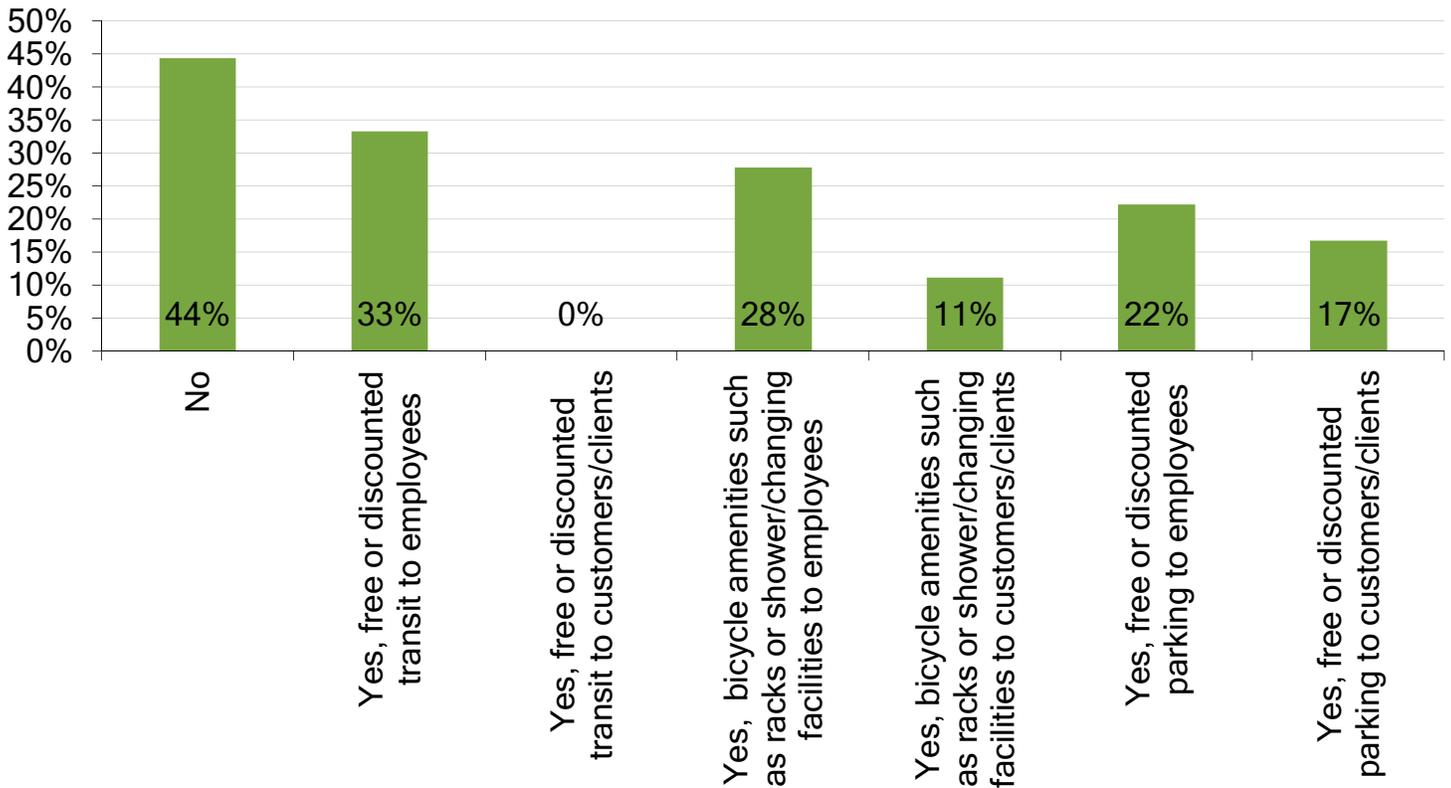


Figure D-5. Employee Commute Areas – Ferry Building Area

Percentages do not add up to 100 because these figures represent averages of estimates across all responses.

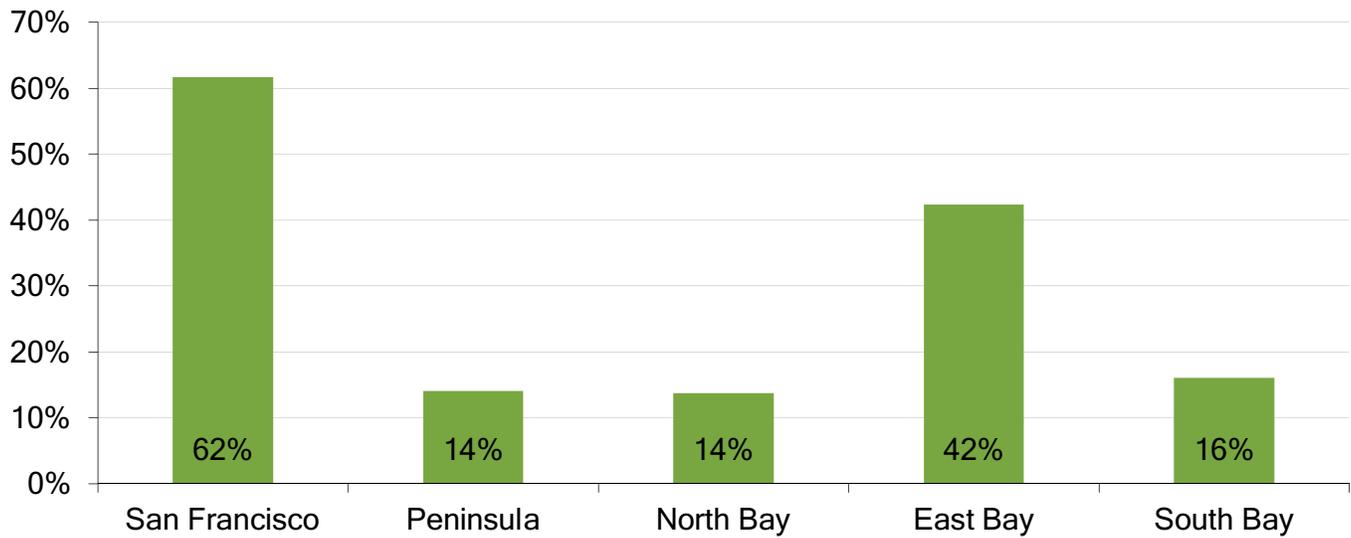


Figure D-6. Employee Transportation Modes – Ferry Building Area

Percentages do not add up to 100 because these figures represent averages of estimates across all responses.

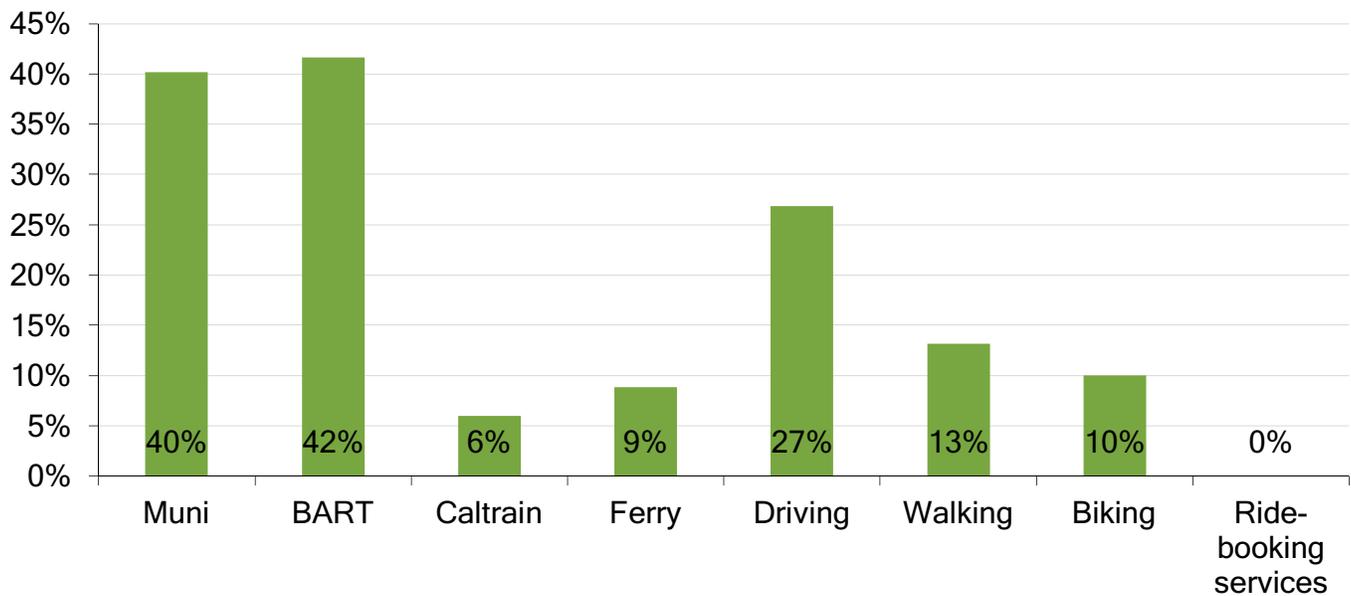


Figure D-7. Rating of Transportation Services for Employees – Ferry Building Area

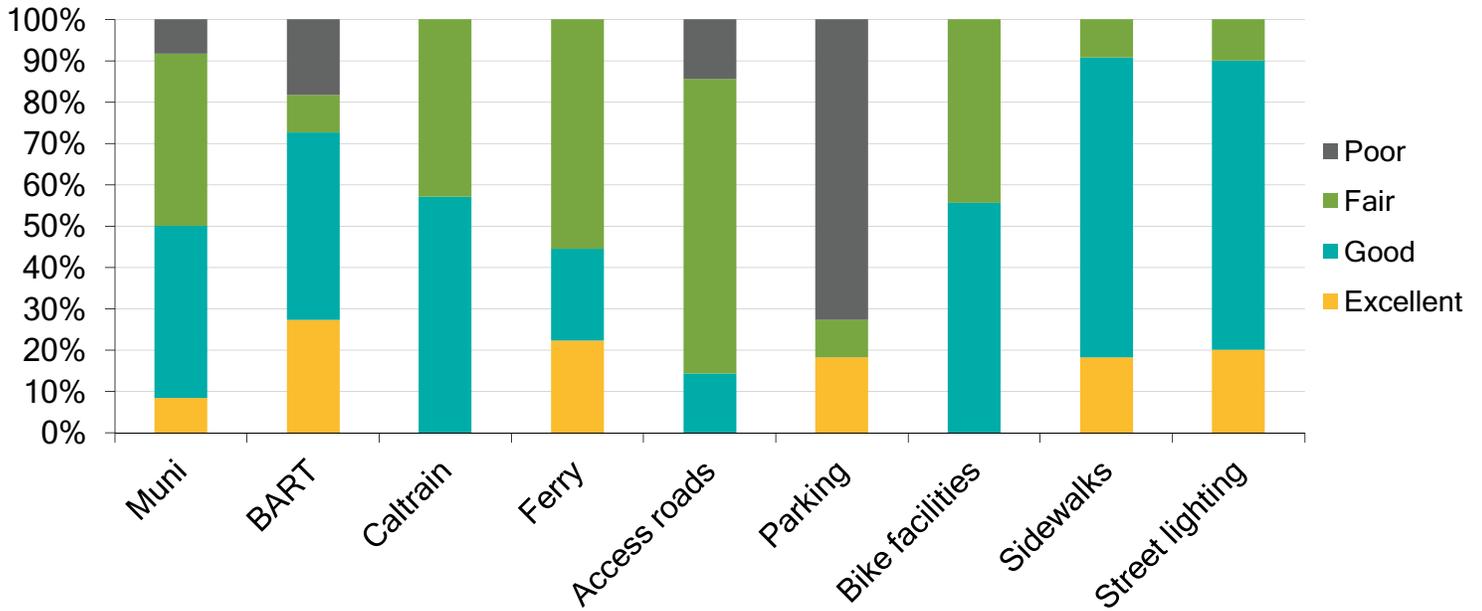


Figure D-8. Customer Travel Areas – Ferry Building Area

Percentages do not add up to 100 because these figures represent averages of estimates across all responses.

Responses in the “Other” category indicated tourists from outside the Bay Area, and another with a retail distribution network rather than customers coming to the location.

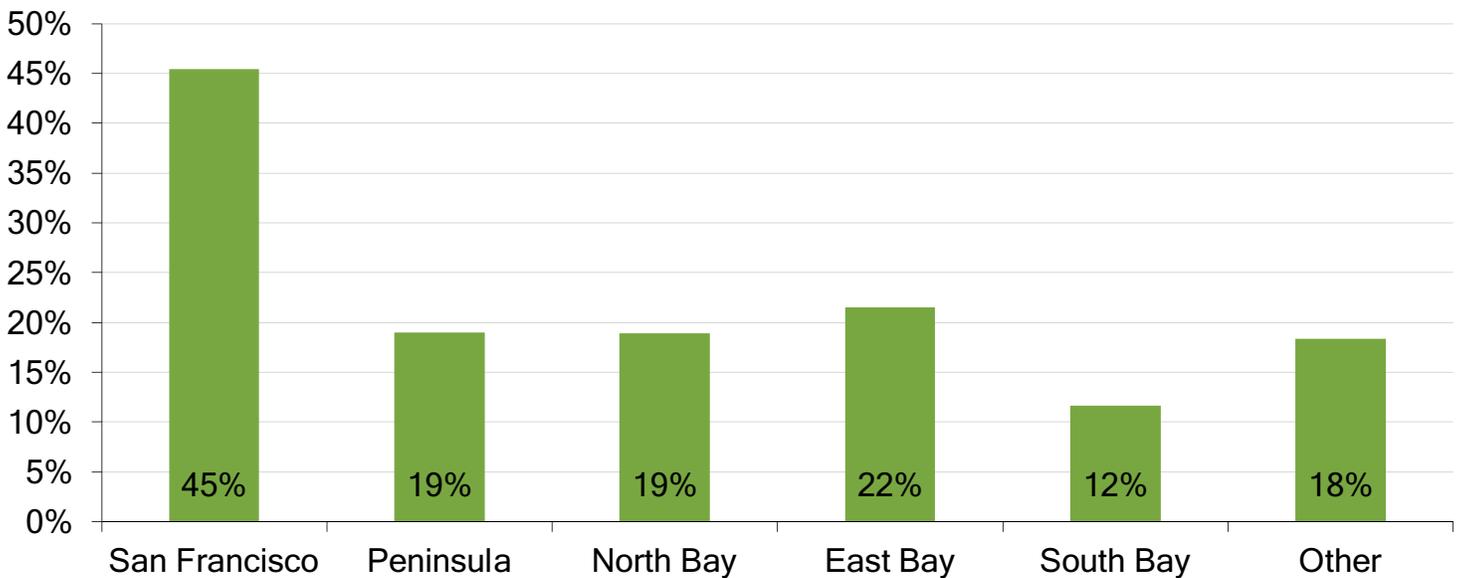


Figure D-9. Customer Transportation Services Used – Ferry Building Area

Percentages do not add up to 100 because these figures represent averages of estimates across all responses.

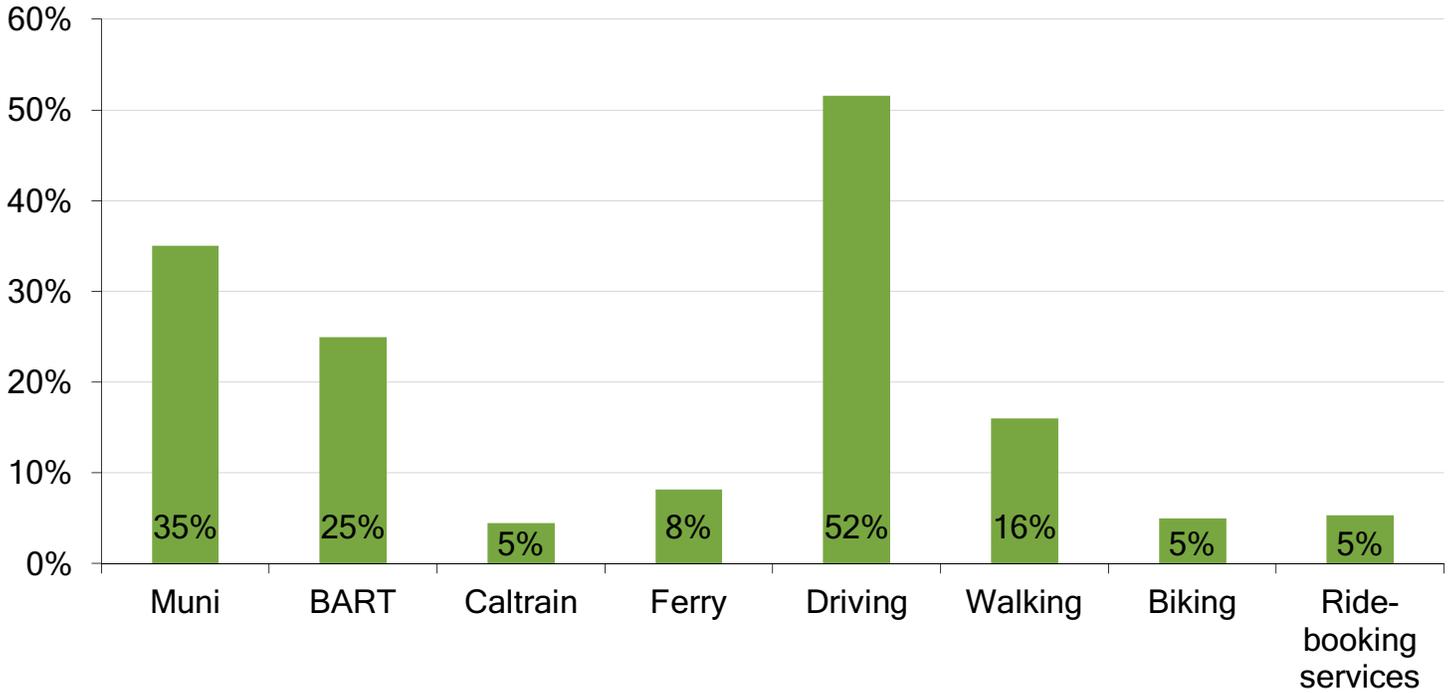


Figure D-10. Ratings of Transportation Services for Customers – Ferry Building Area

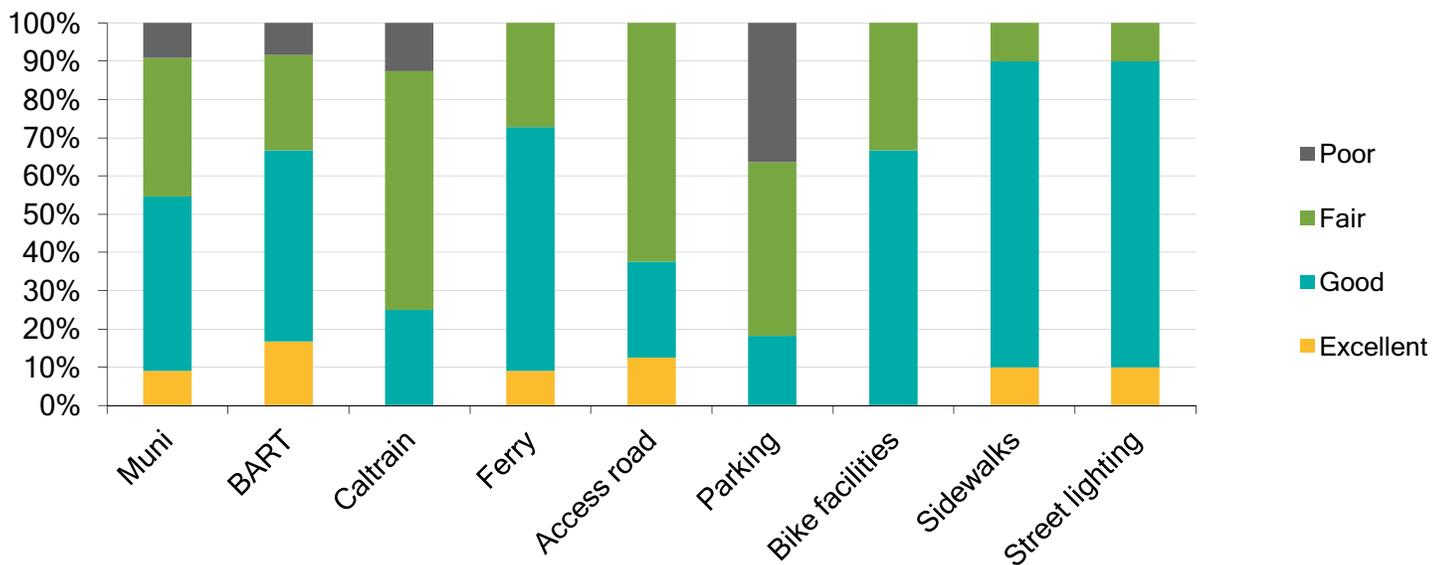


Figure D-11. Number of Deliveries Weekly – Ferry Building Area

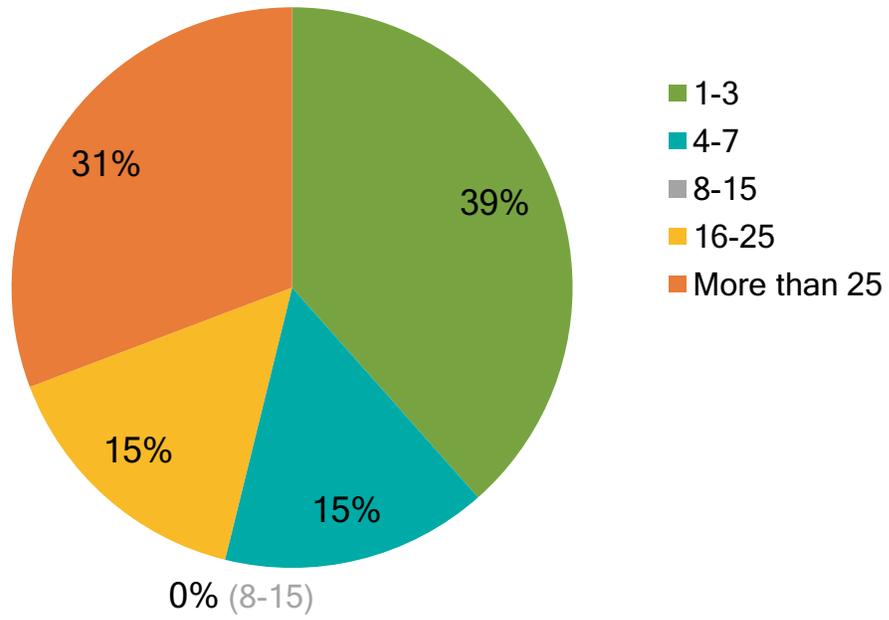


Figure D-12. Timing of Deliveries – Ferry Building Area

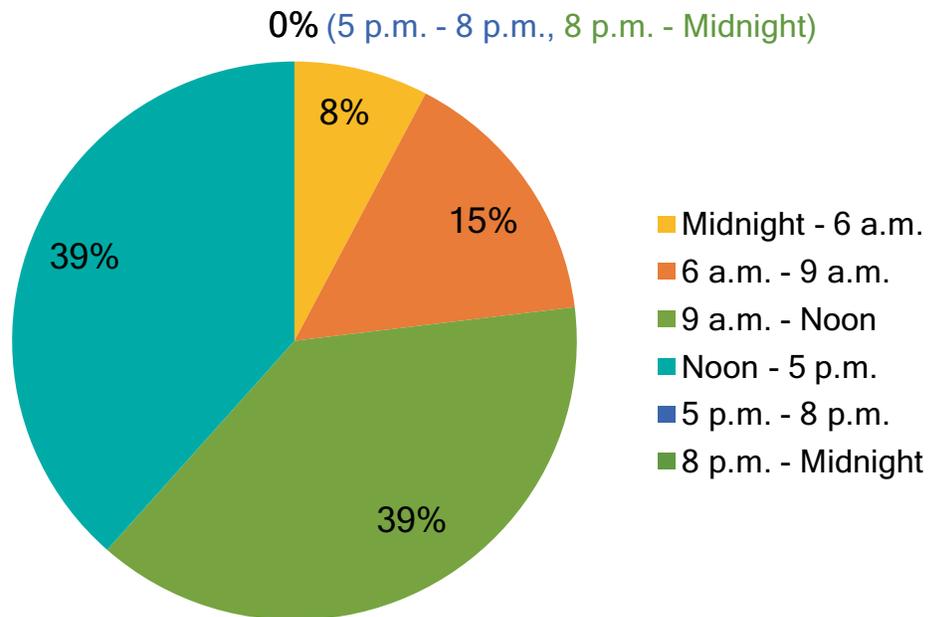


Figure D-13. Delivery Access Needs – Ferry Building Area

Percentages do not add to 100 because respondents could select all that applied.

Responses in the “Other” category specified that no delivery access was needed.

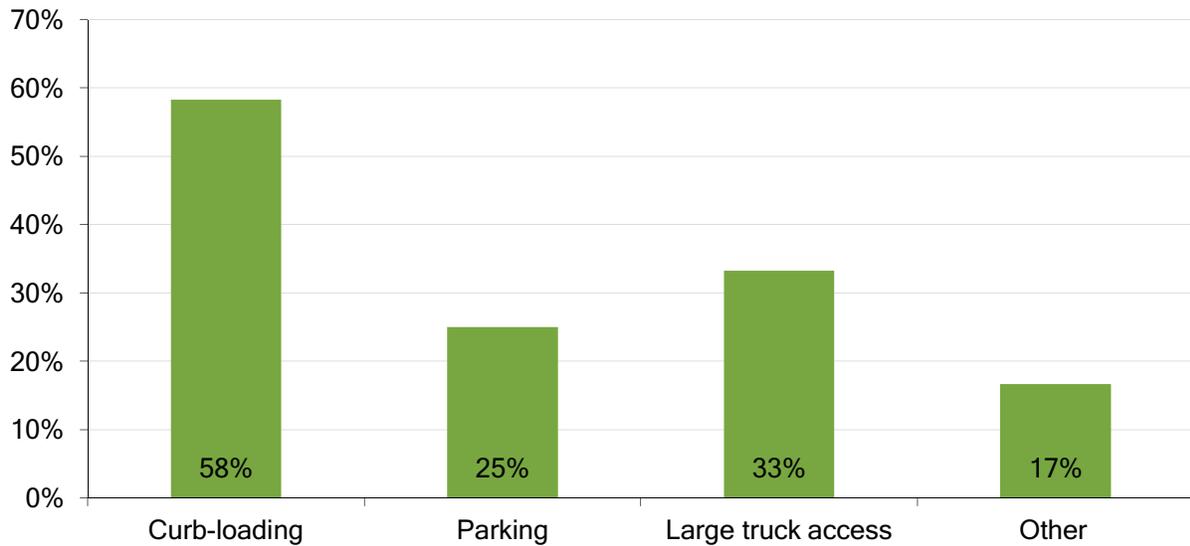


Figure D-14. Impact of Transportation Issues – Ferry Building Area

The degree of impact was determined by combining “Greatly Impacts” and “Impacts” responses.

Responses in the “Other” category noted issues regarding bicycles and motorized scooters along the Embarcadero walkways.

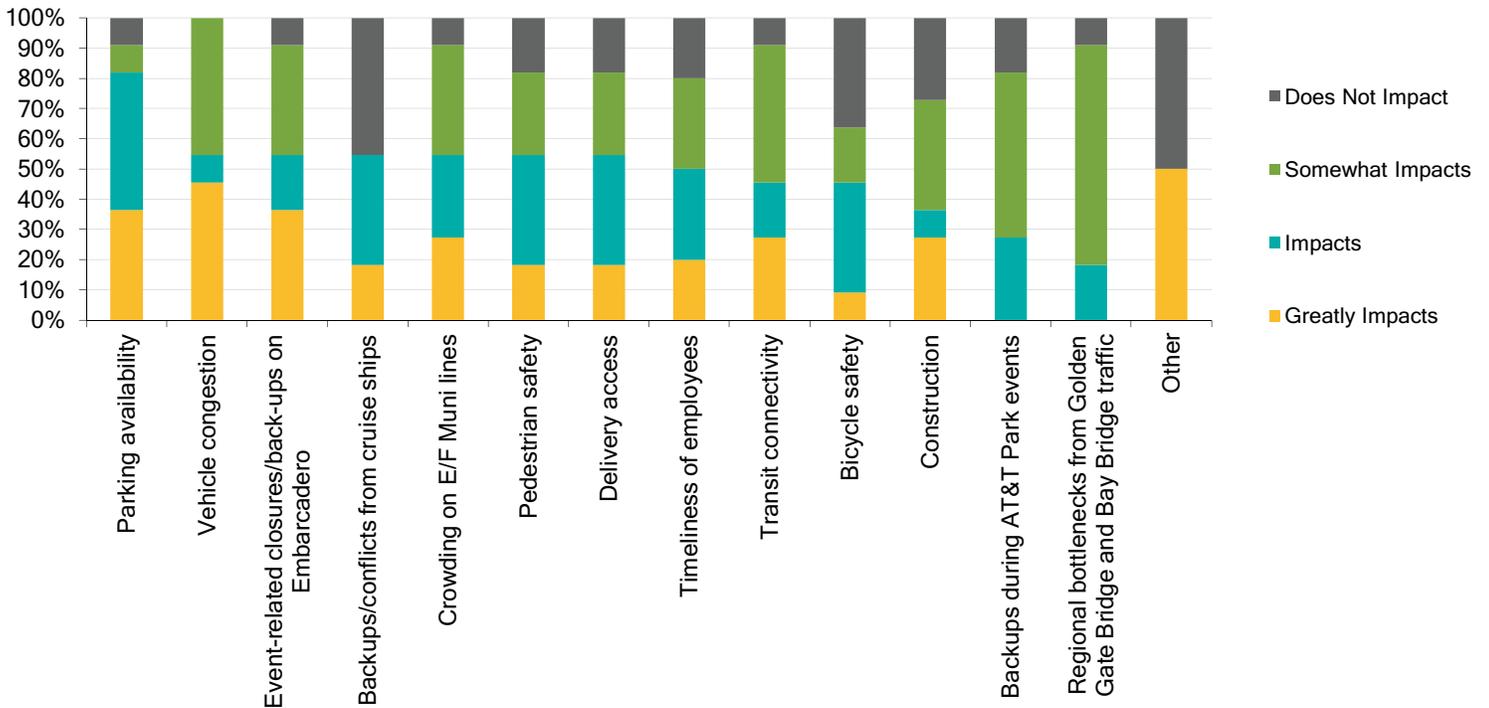


Figure D-15. Satisfaction with Advance Notice of Events – Ferry Building Area

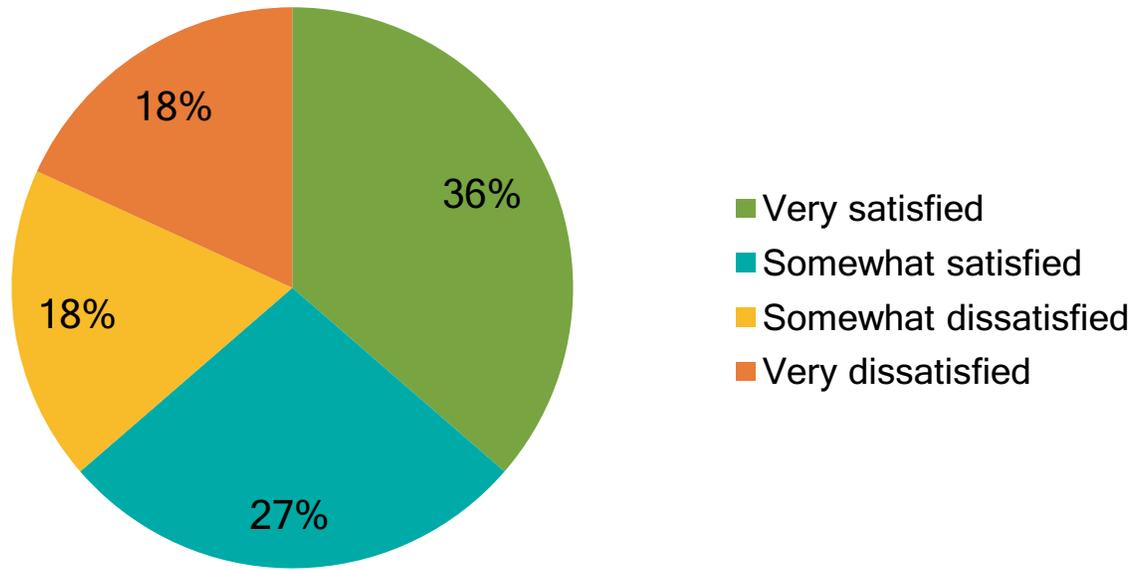
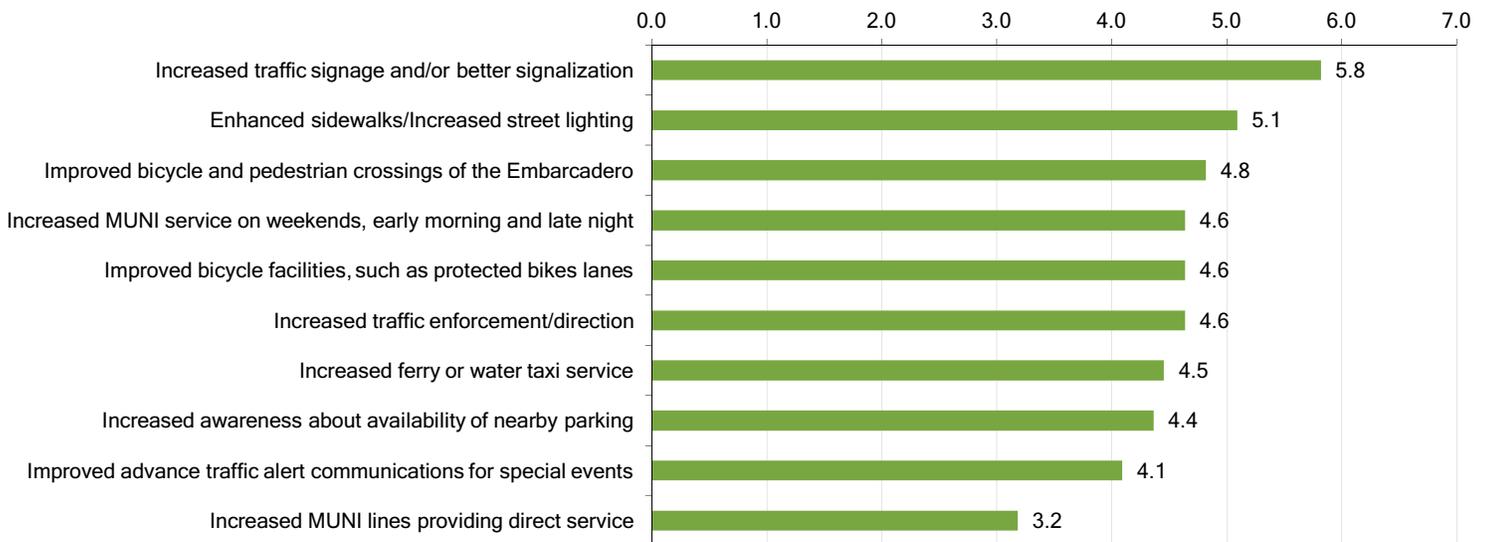


Figure D-16. Prioritization of Improvement Projects – Ferry Building Area



APPENDIX E SOUTH BEACH EXTENDED RESPONSE DATA

This appendix contains a complete set of the data for South Beach Extended survey responses, including the charts in the South Beach Extended Area Survey Analysis section.

Figure E-1. Usage Types – South Beach Extended

Responses in the “Other” category include:

- ▶ Artists/Art Studios (7)
- ▶ Moving business
- ▶ Transportation business
- ▶ Warehouse/Maintenance Yard
- ▶ Special Events business
- ▶ Pedicab business

- Office
- Retail
- Restaurant
- Entertainment Destination
- Light Industrial Processes
- Storage Shed/Warehouse
- Fishing Industry
- Maritime (water-based)
- Parking
- Other

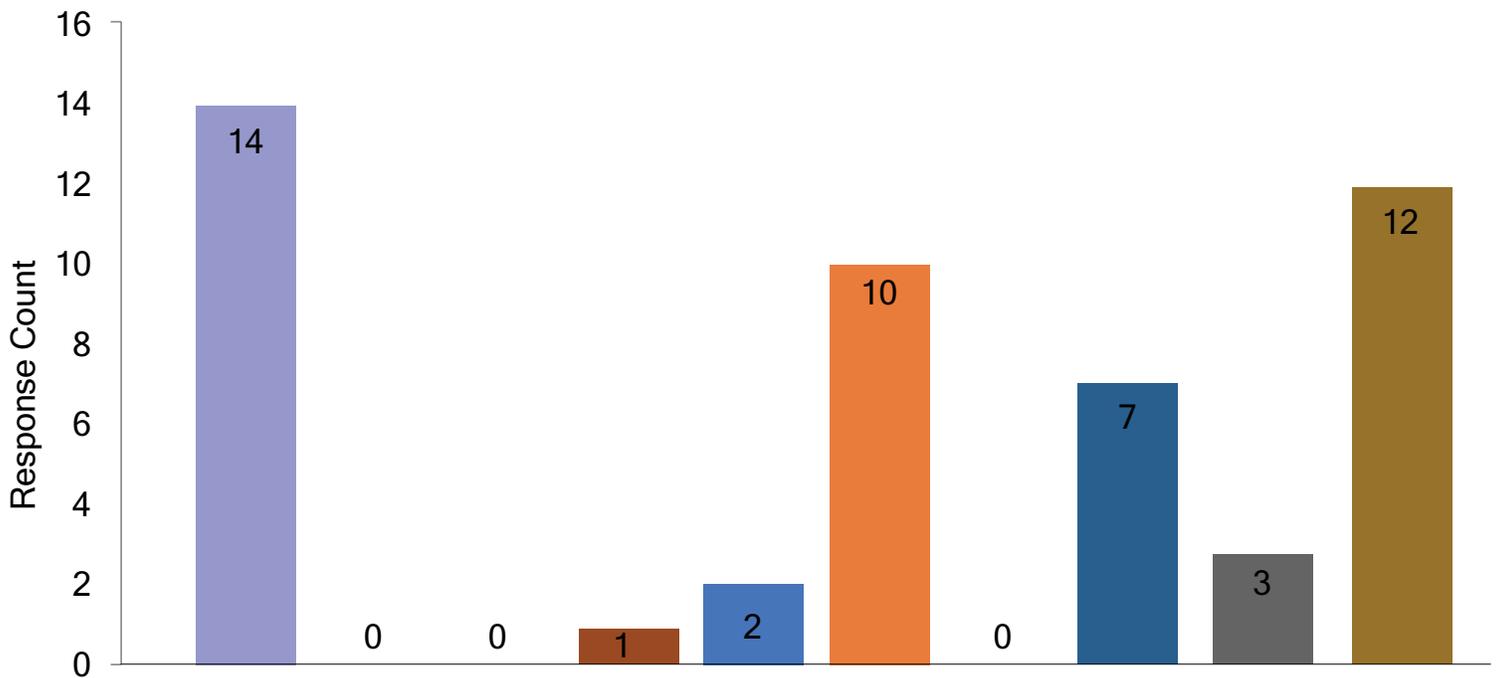


Figure E-2. Hours of Operation – South Beach Extended

Percentages do not add up to 100 because respondents were allowed to select more than one response.

Responses in the “Other” category include:

- ▶ All days, all hours
- ▶ We dispatch crews and trucks 7 days a week. Usually the morning is busiest.
- ▶ 7 days a week
- ▶ 365 days, 24/7 (several responses)
- ▶ 7 am – 5 pm
- ▶ 10:30 pm – 2:30 am

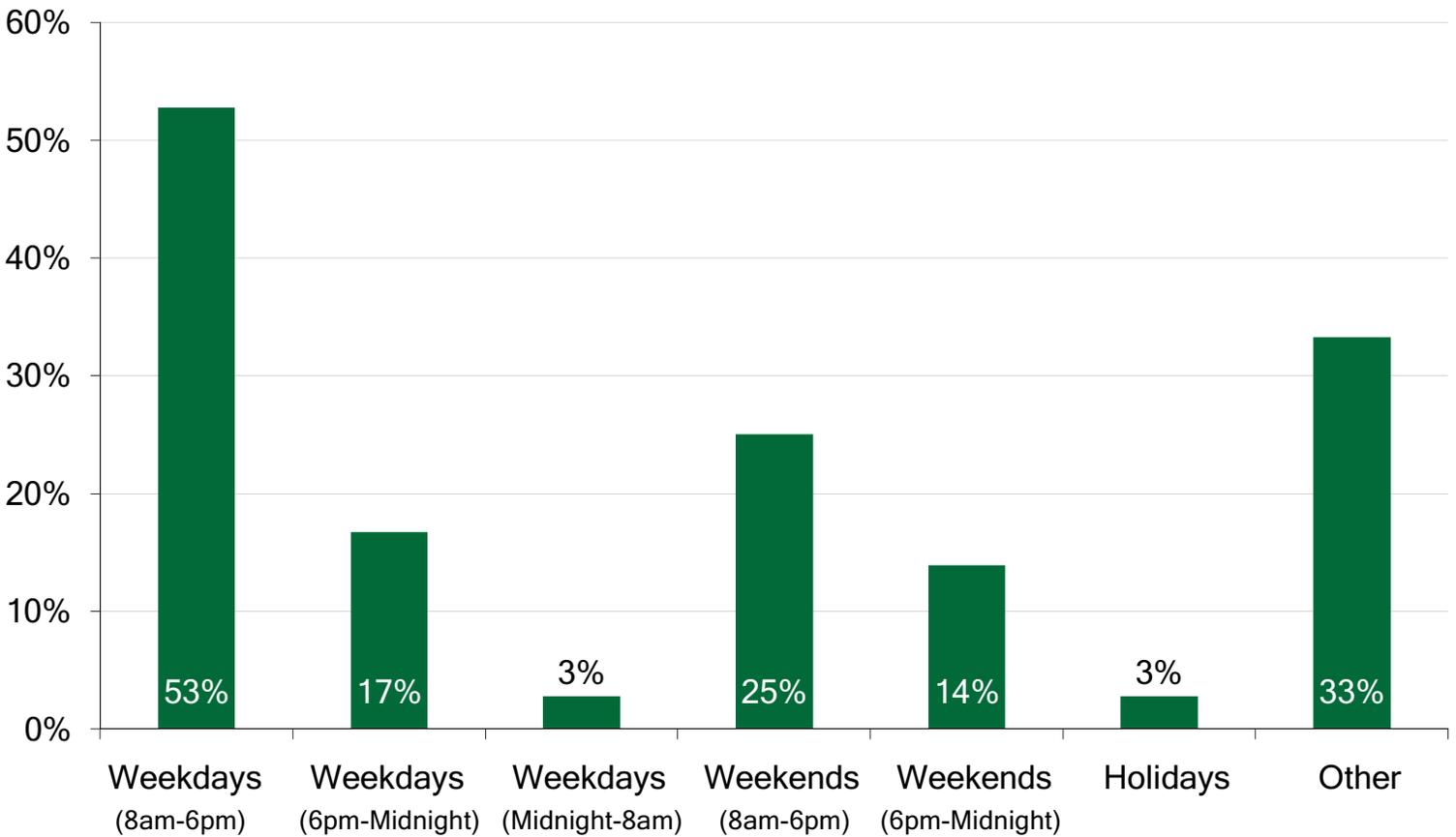


Figure E-3. Number of Employees – South Beach Extended

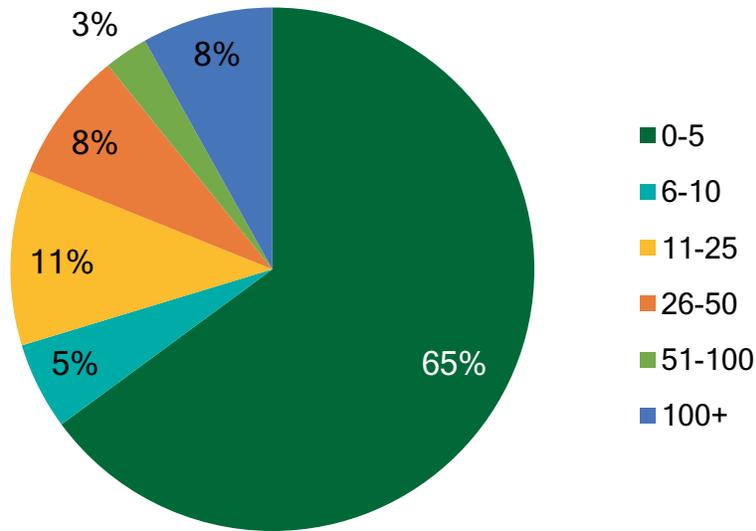


Figure E-4. Transportation Benefits Offered – South Beach Extended

Percentages do not add to 100 because respondents were asked to select all that apply.

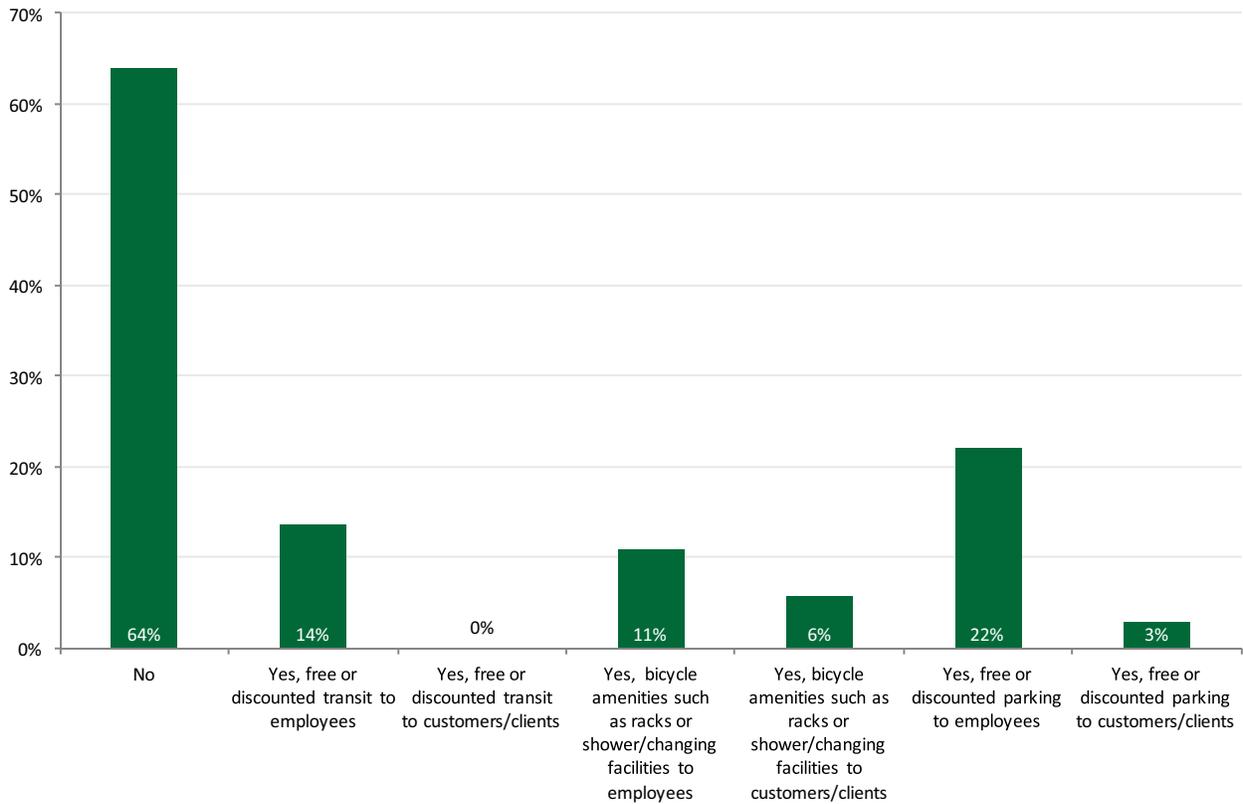


Figure E-5. Employee Commute Areas – South Beach Extended

Percentages do not add up to 100 because these figures represent averages of estimates across all responses.

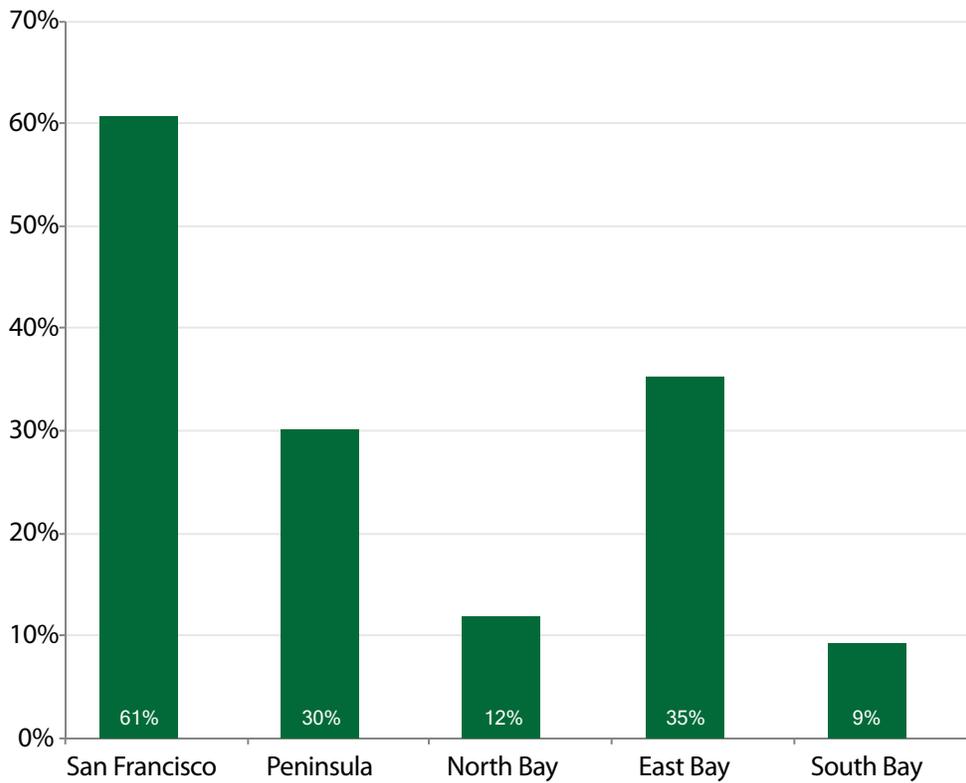


Figure E-6. Employee Transportation Modes – South Beach Extended

Percentages do not add up to 100 because these figures represent averages of estimates across all responses.

Responses in the "Other" category were split between "by water" and N/A.

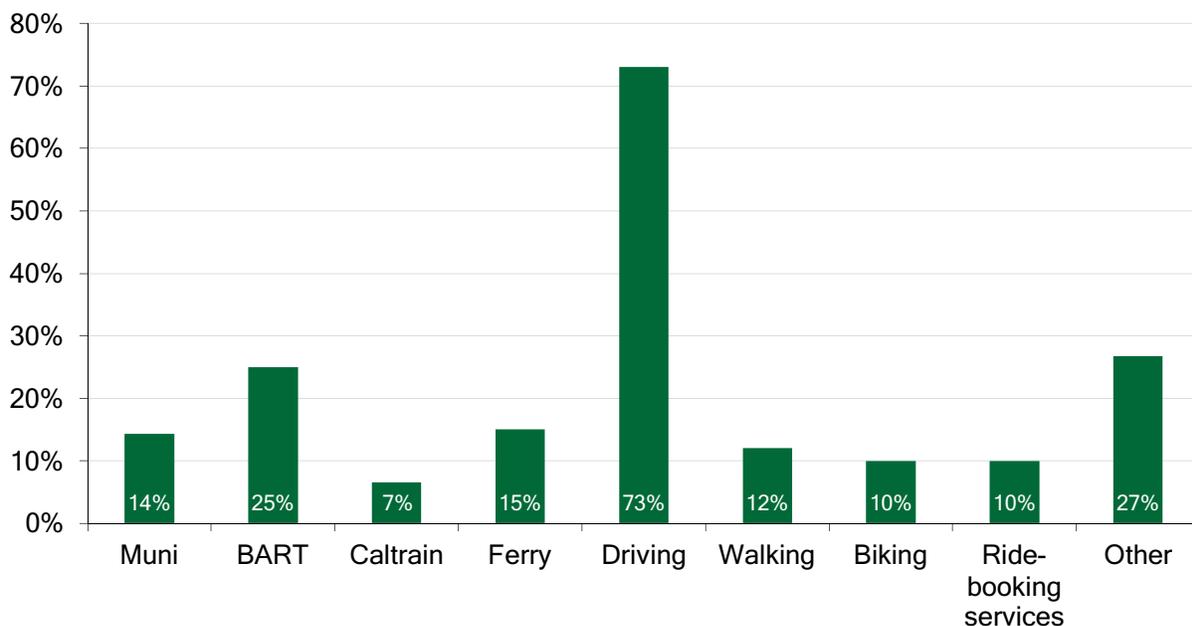


Figure E-7. Rating of Transportation Services for Employees – South Beach Extended

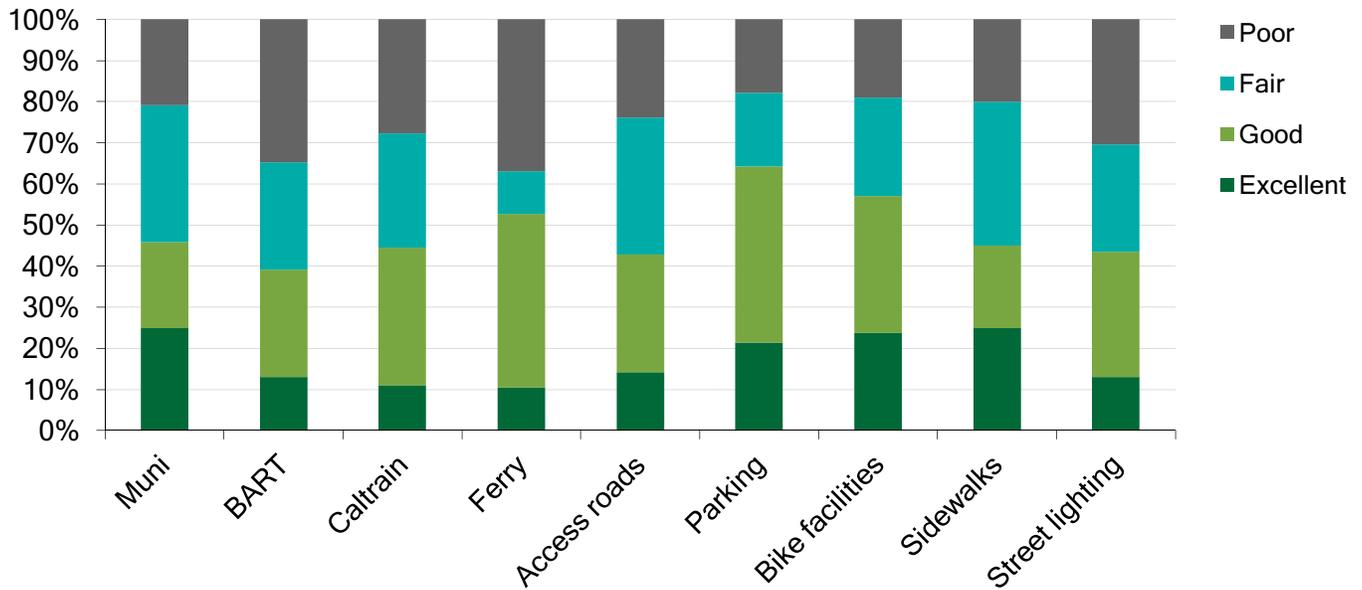


Figure E-8. Customer Travel Areas – South Beach Extended

Percentages do not add up to 100 because these figures represent averages of estimates across all responses.

Responses in the “Other” category were a mix of:

- ▶ Arrival by water
- ▶ Arrival from area airports via taxi
- ▶ No customers visit the location

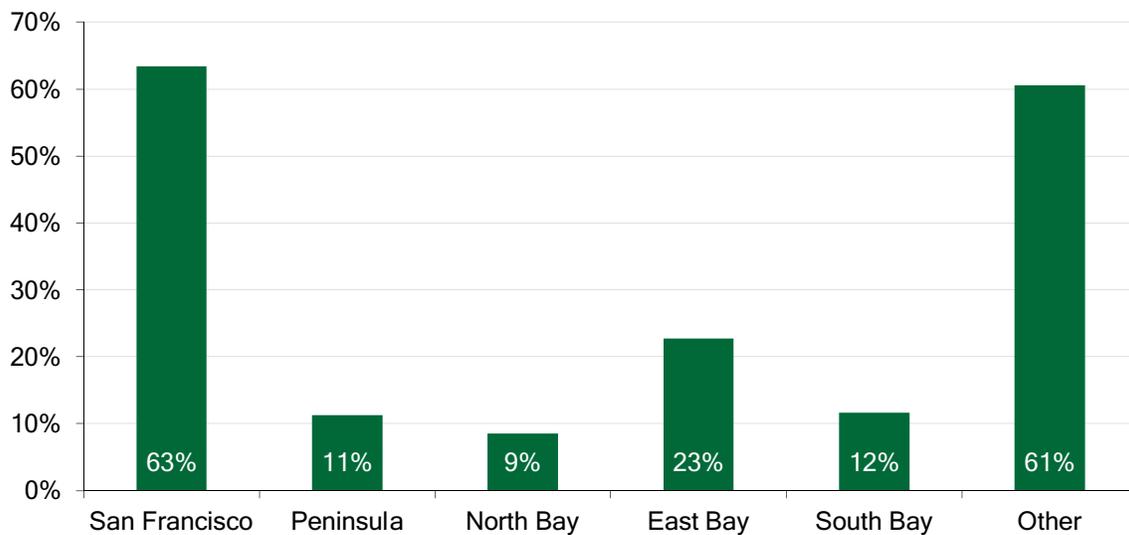


Figure E-9. Customer Transportation Services Used – South Beach Extended

Percentages do not add up to 100 because these figures represent averages of estimates across all responses.

Approximately half of the responses in the “Other” category indicated that customers do not travel to the location. The remainder were a mix of boat and airport transfers.

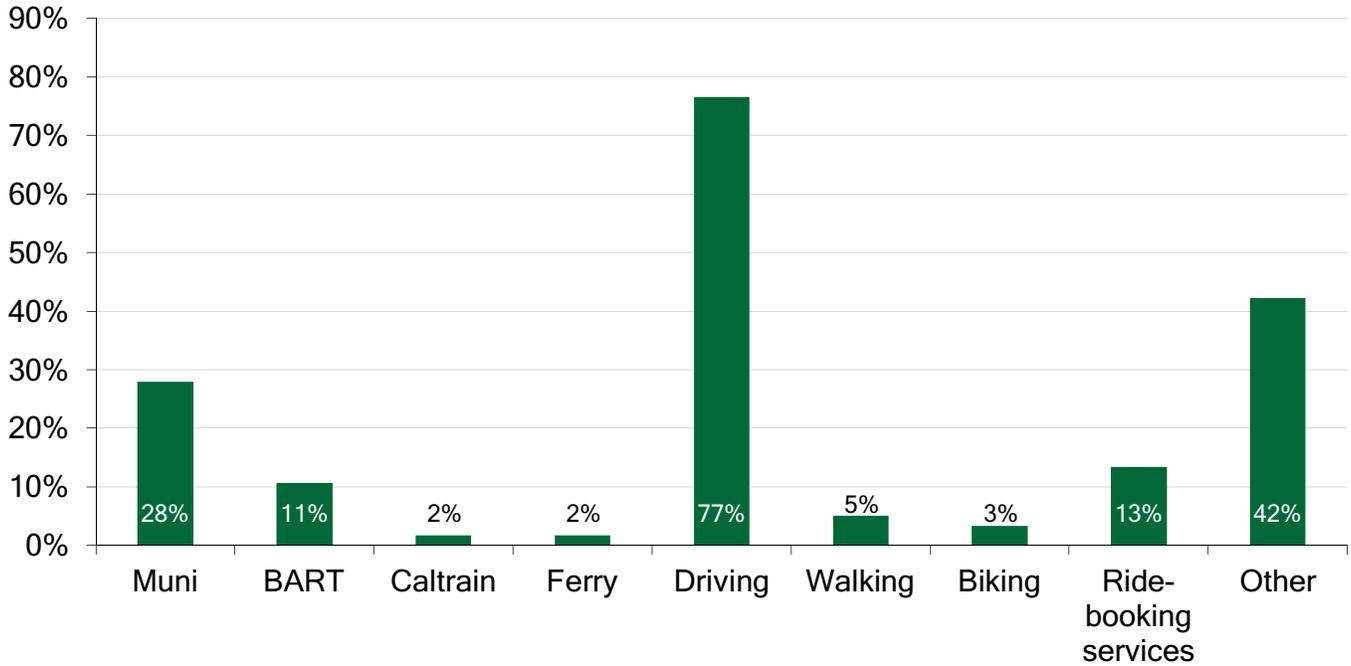


Figure E-10. Ratings of Transportation Services for Customers – South Beach Extended

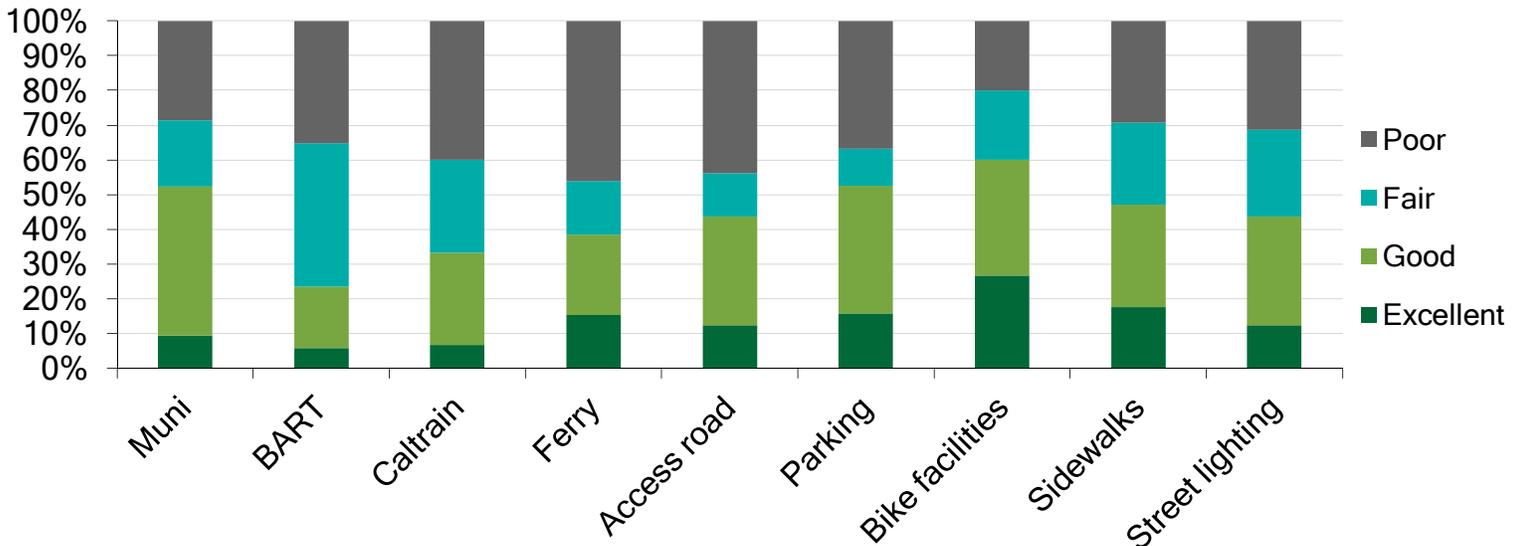


Figure E-11. Number of Weekly Deliveries – South Beach Extended

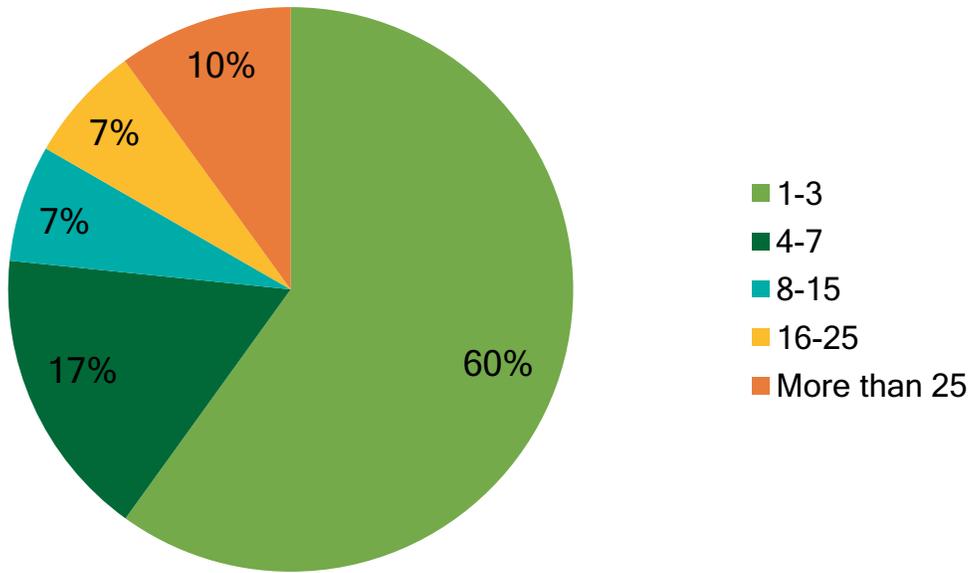


Figure E-12. Timing of Deliveries – South Beach Extended

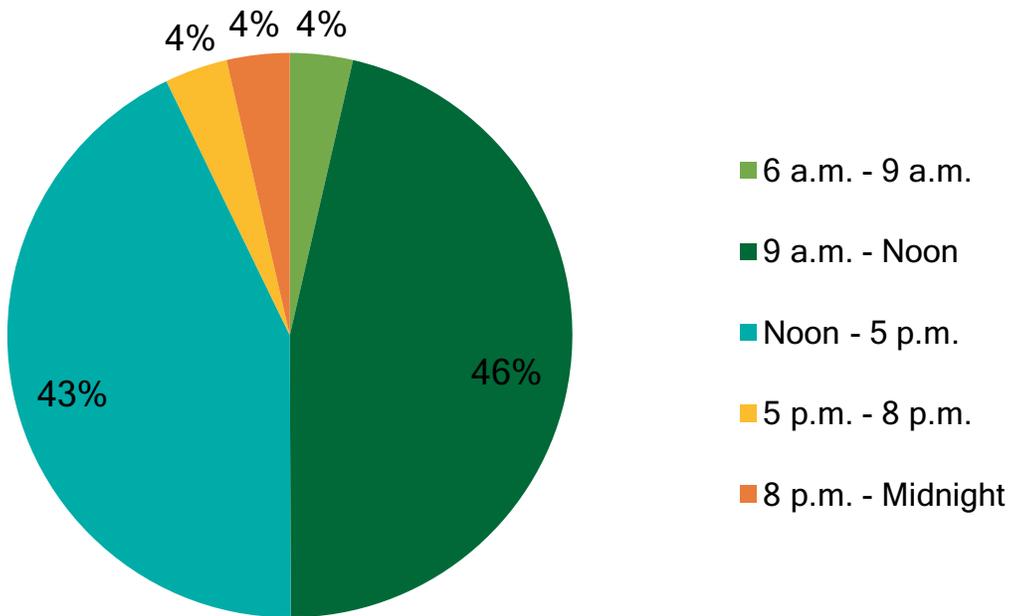


Figure E-13. Delivery Access Needs – South Beach Extended

Percentages do not add to 100 because respondents were asked to select all that apply.

The response in the “Other” category indicates the need to receive delivery of buses.

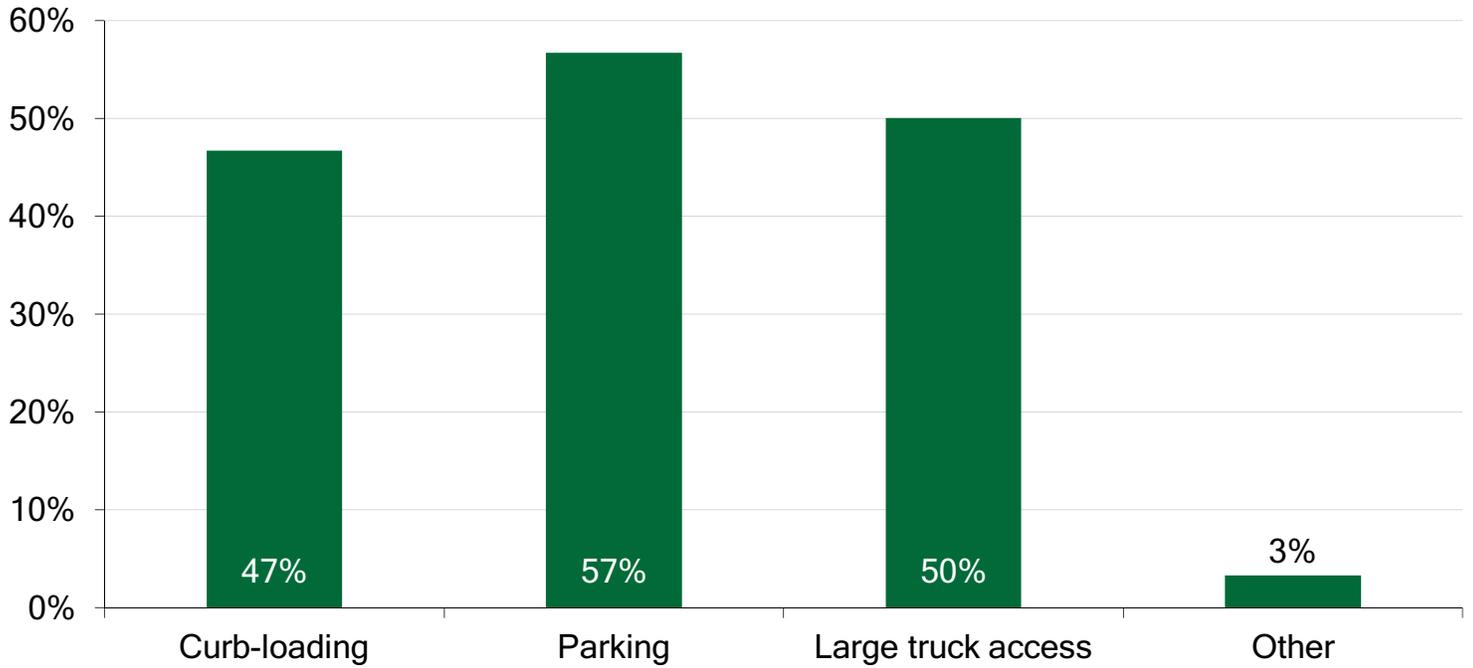


Figure E-14. Impact of Transportation Issues – South Beach Extended

Responses in the “Other” category included:

- ▶ Events at Pier 70 disrupting access to rental space
- ▶ Boaters with difficulty accessing the Bay due to traffic and parking challenges
- ▶ Bicyclists and pedestrians increasing congestion and driving hazards by disregarding traffic rules

The degree of impact was determined by combining “Greatly Impacts” and “Impacts” responses

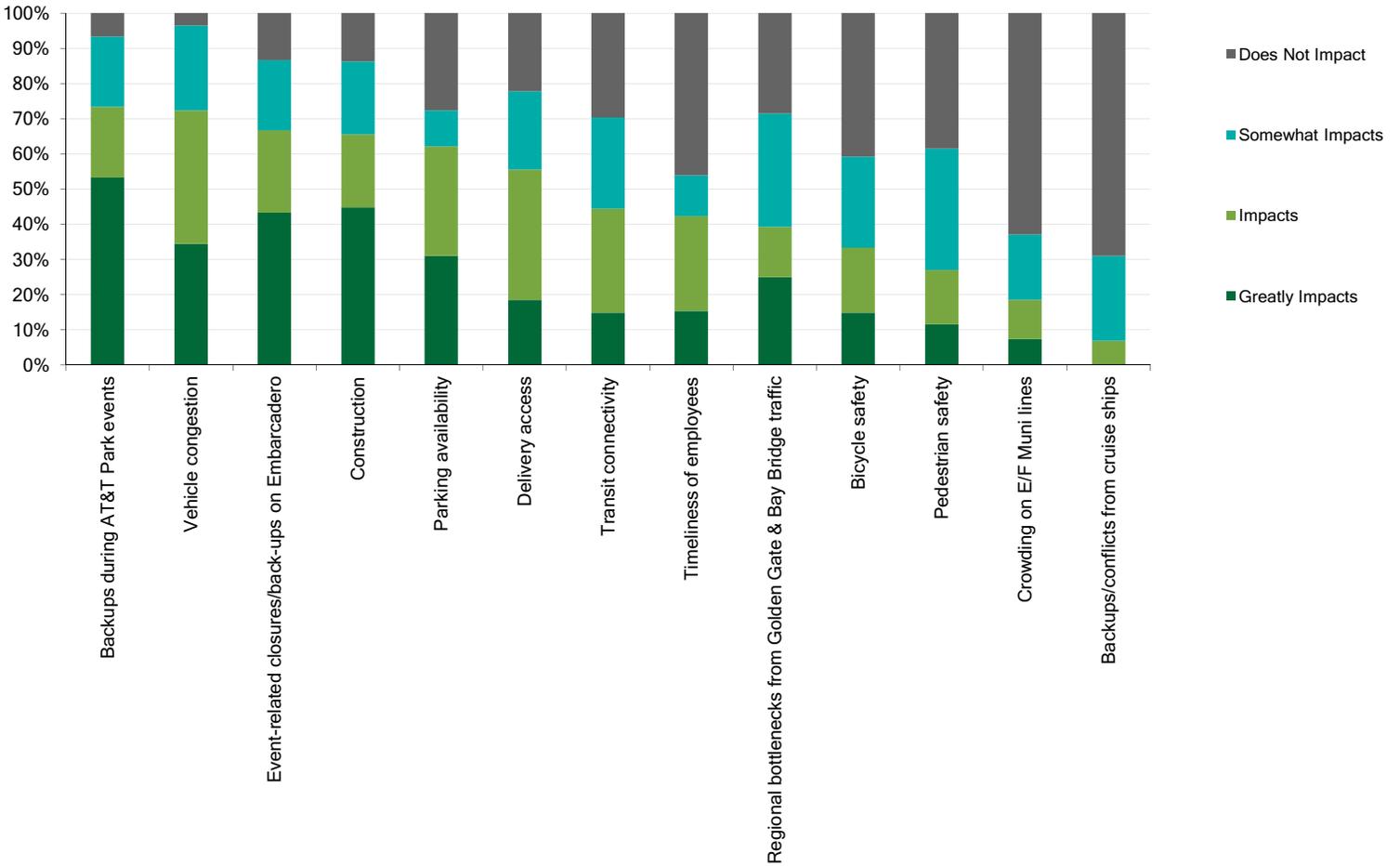


Figure E-15. Satisfaction with Advance Notice of Events – South Beach Extended

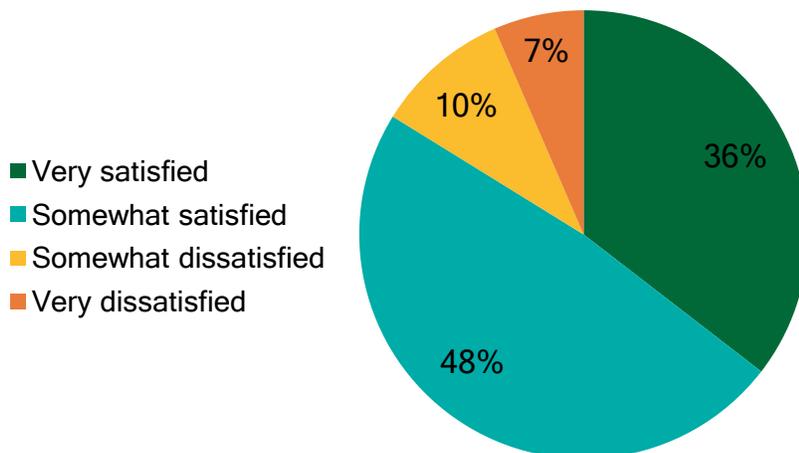
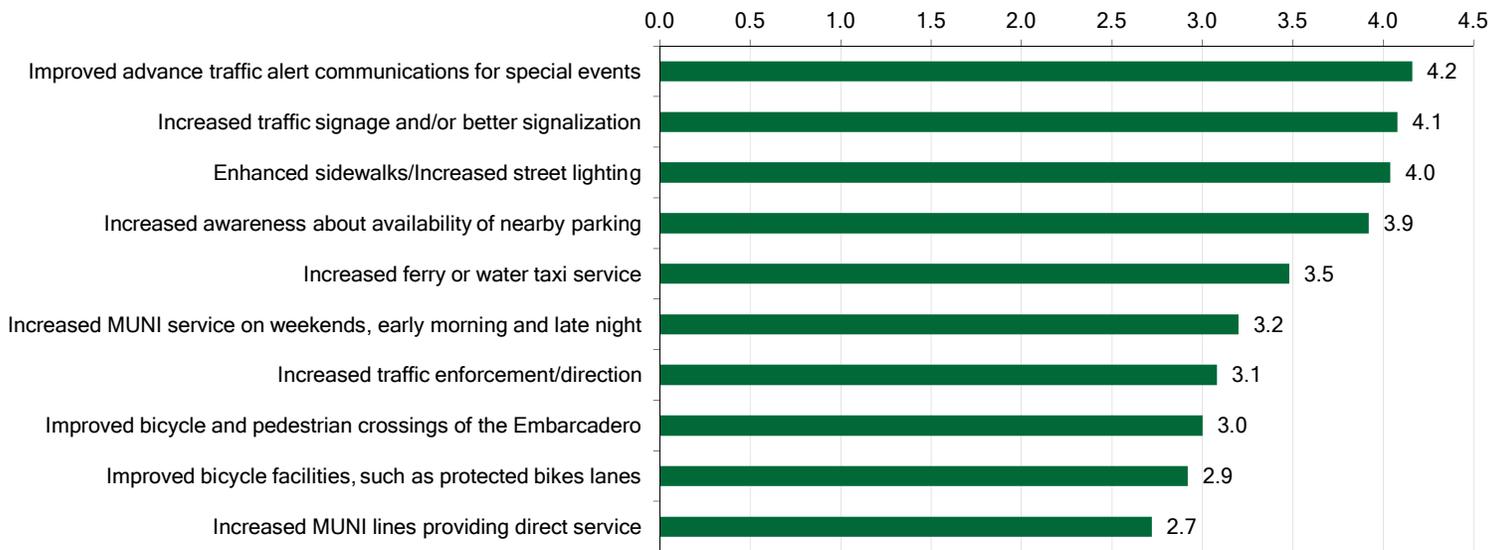


Figure E-16. Prioritization of Improvement Projects – South Beach Extended



APPENDIX F NELSON\NYGAARD NORTHERN WATERFRONT TRANSPORTATION ANALYSIS

Transportation on the Northern Waterfront



Study Plan and Goals

- Survey Port's Northern Waterfront tenants on transportation needs
- Goals
 - Document Port tenants' access experience and needs
 - Collaborate with other City agencies to address key transportation needs identified in survey
 - Identify access needs Port can address in-house
 - Leverage other City planning efforts

Existing Conditions and Plans Review

- Inform survey content
- Review:
 - Existing Conditions/Needs, as identified in past reports/data collection efforts or by Port staff
 - Relevant surveys
 - Projects, plans, and developments



Study Area

Northern Waterfront, Bay Bridge to Fisherman's Wharf

Nelson\Nygaard Consulting Associates, Inc.

Existing Conditions



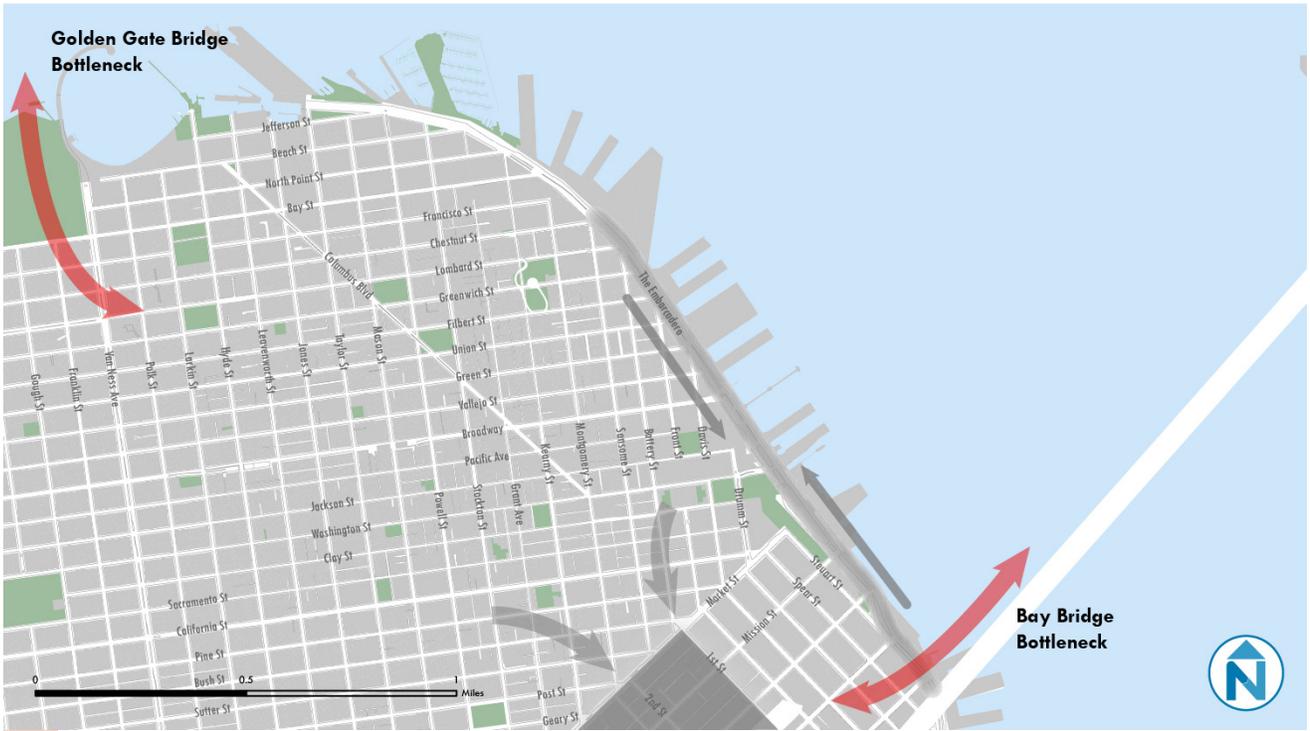
**Central SoMa Congestion,
Spillback from Freeway Ramps**

Traffic

Congestion in the Core

SFCTA: Core Circulation Study projects gridlock in future

Nelson\Nygaard Consulting Associates, Inc.



Traffic

Regional Bottlenecks

No other roadway options for North Bay, East Bay

Nelson\Nygaard Consulting Associates, Inc.

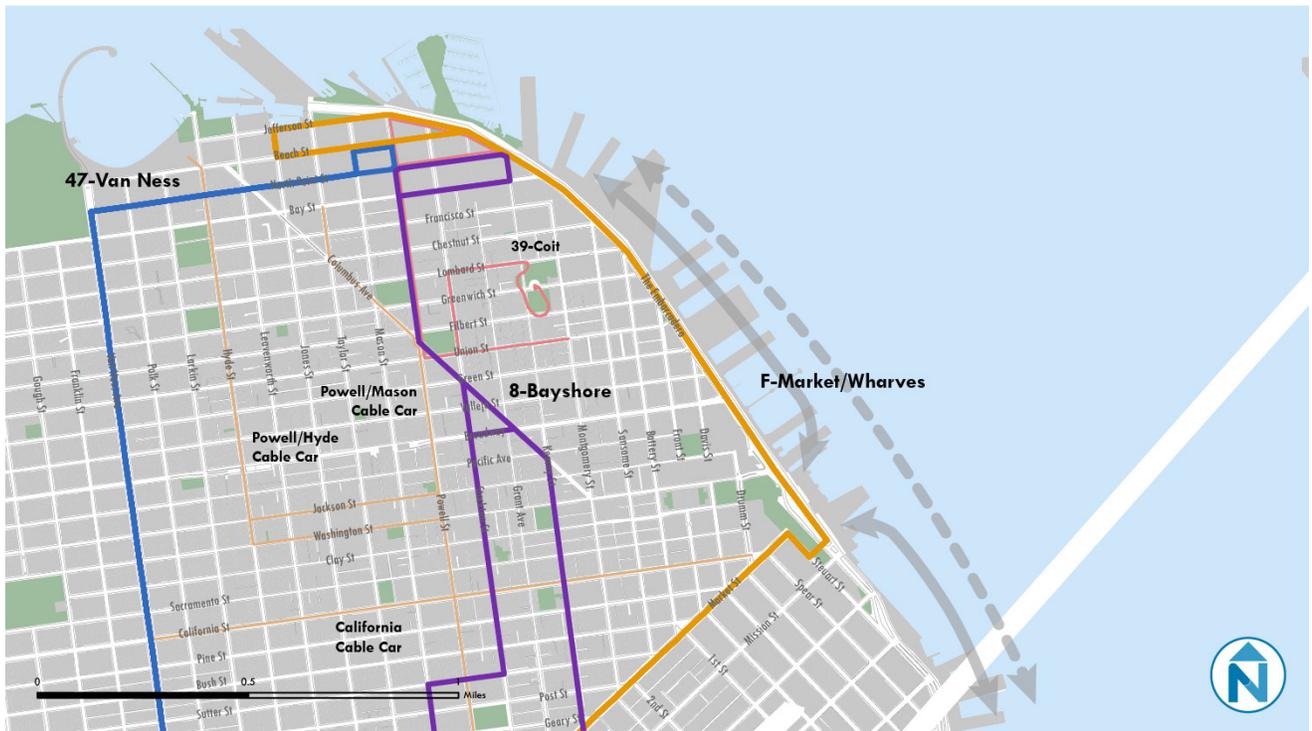


Transit

Connectivity Along The Embarcadero

Today: No direct connection between Caltrain and Northern Waterfront (to change this summer)

Nelson\Nygaard Consulting Associates, Inc.



Transit

Limited Number of Lines Provide Direct Service

Several lines touch waterfront, but F provides main access

Nelson\Nygaard Consulting Associates, Inc.



Transit

Crowding on Transit: F

Anecdotal reports of crowding, also noted in San Francisco Transportation Plan

Nelson\Nygaard Consulting Associates, Inc.

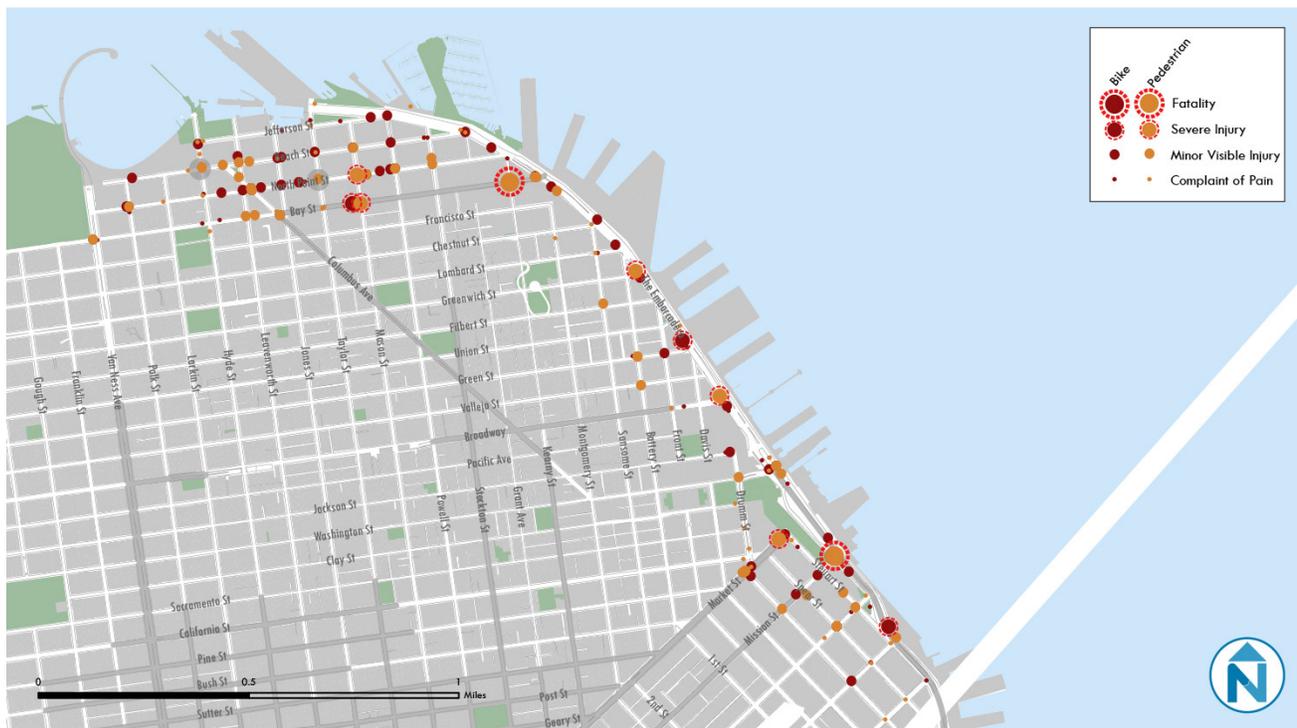


Bike/Ped

High-Injury Corridors

6% of street miles citywide that are responsible for 60% of cyclist/ pedestrian injuries

Nelson\Nygaard Consulting Associates, Inc.

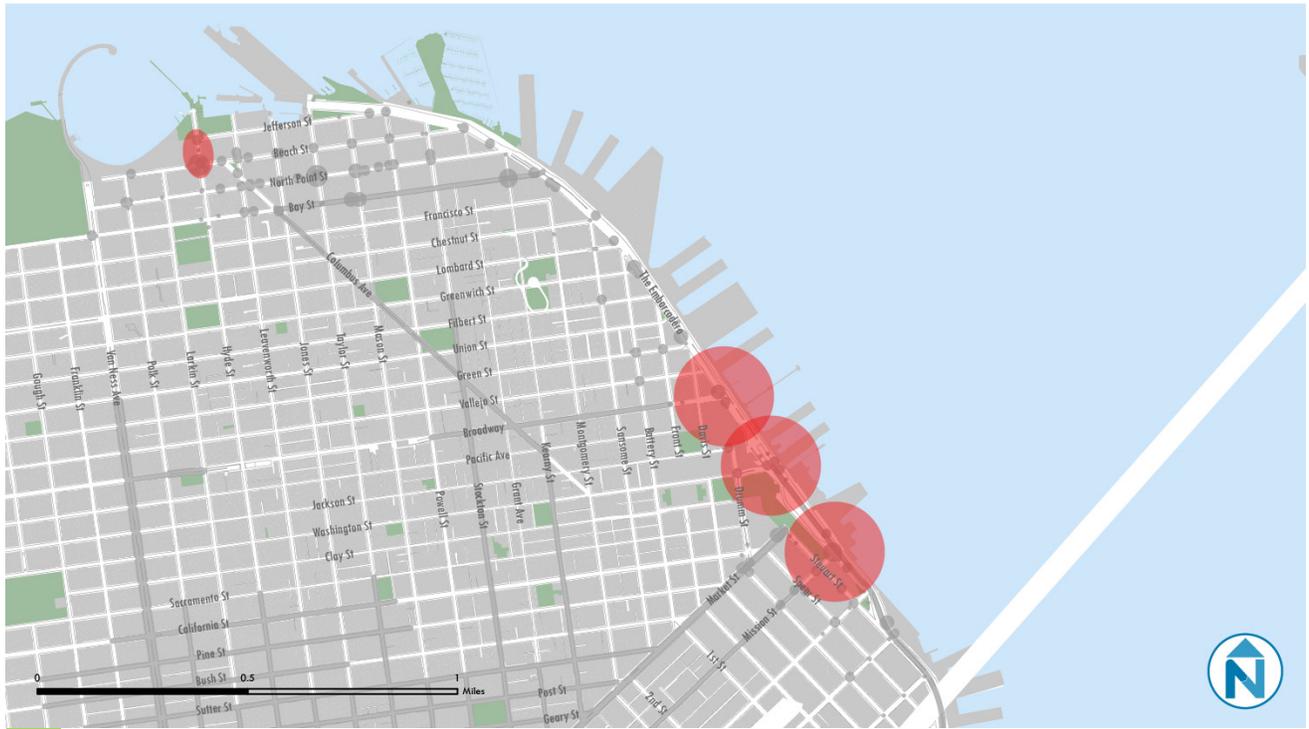


Bike/Ped

Incidents in Waterfront Area, 2008-2013

224 total incidents, including two fatalities and six severe injuries, in six-year span

Nelson\Nygaard Consulting Associates, Inc.



Bike/Ped

Bike/Pedestrian Safety Hotspots

Intersections/street segments with numerous incidents

Nelson\Nygaard Consulting Associates, Inc.

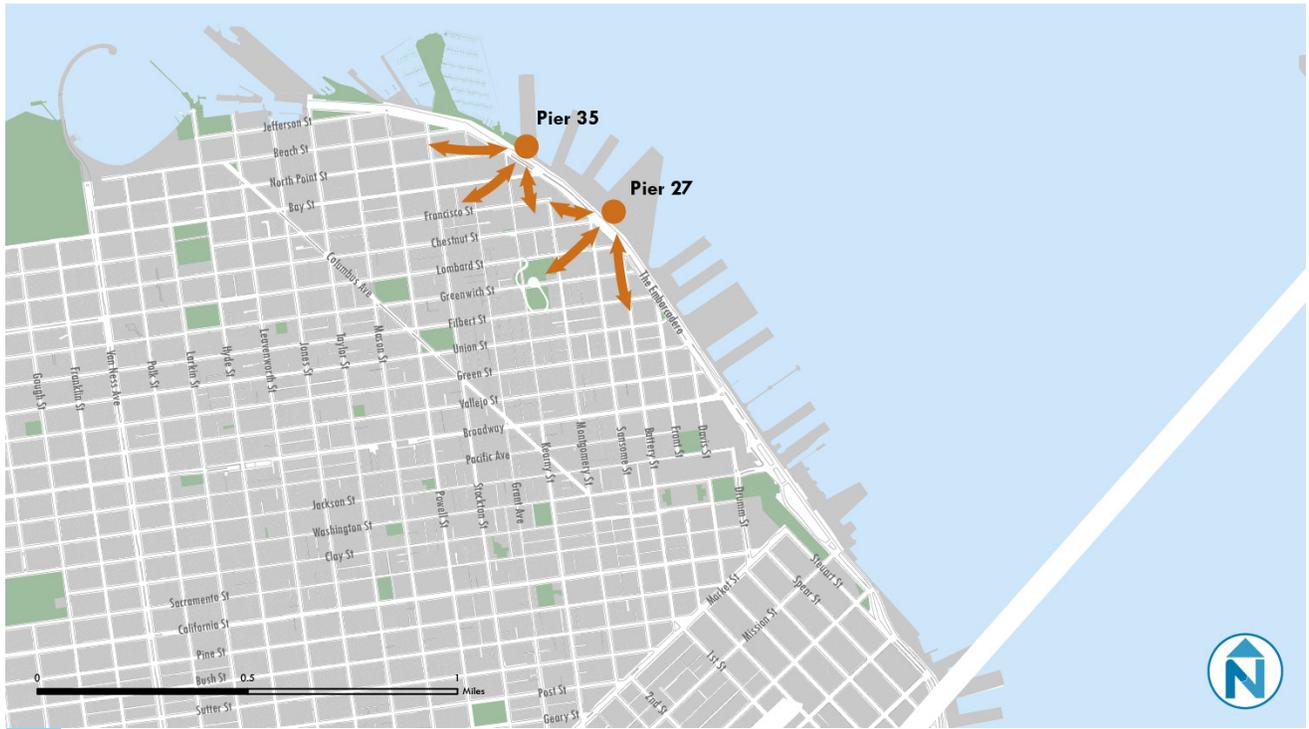


Loading

Delivery and Large Vehicle Access Hotspots

Where high pedestrian volumes meet delivery trucks/vans

Nelson\Nygaard Consulting Associates, Inc.



Events

Backups/Conflicts During Cruise Ship Berths

Multiple berths create particularly acute issues

Nelson\Nygaard Consulting Associates, Inc.

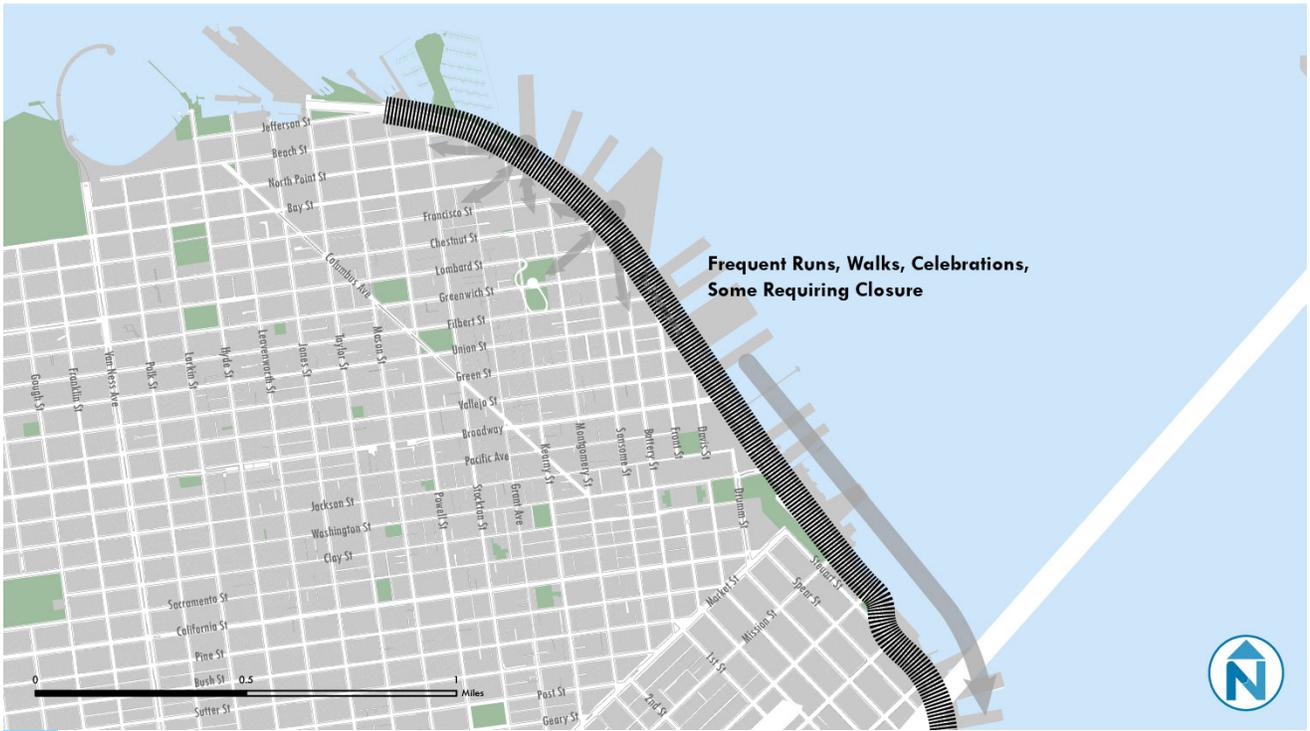


Events

Backups During AT&T Park Events

Delays around ballpark add to existing congestion

Nelson\Nygaard Consulting Associates, Inc.



**Frequent Runs, Walks, Celebrations,
Some Requiring Closure**

Events

Regular Events along the Embarcadero

Embarcadero shut down or sees heavy pedestrian traffic on sidewalk/at crossings

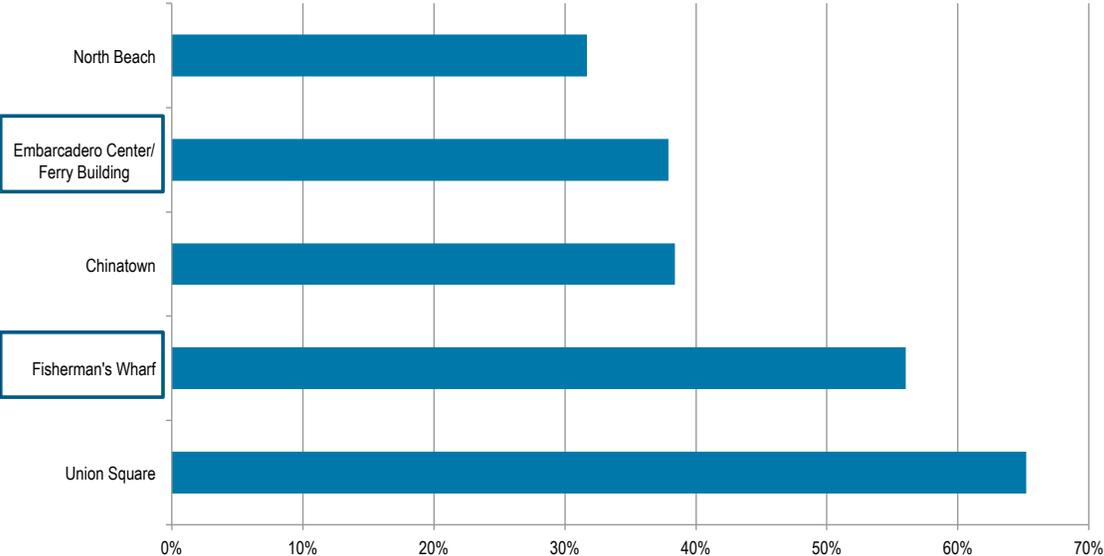
Nelson\Nygaard Consulting Associates, Inc.

Perceptions

Convention and Visitors' Bureau Survey

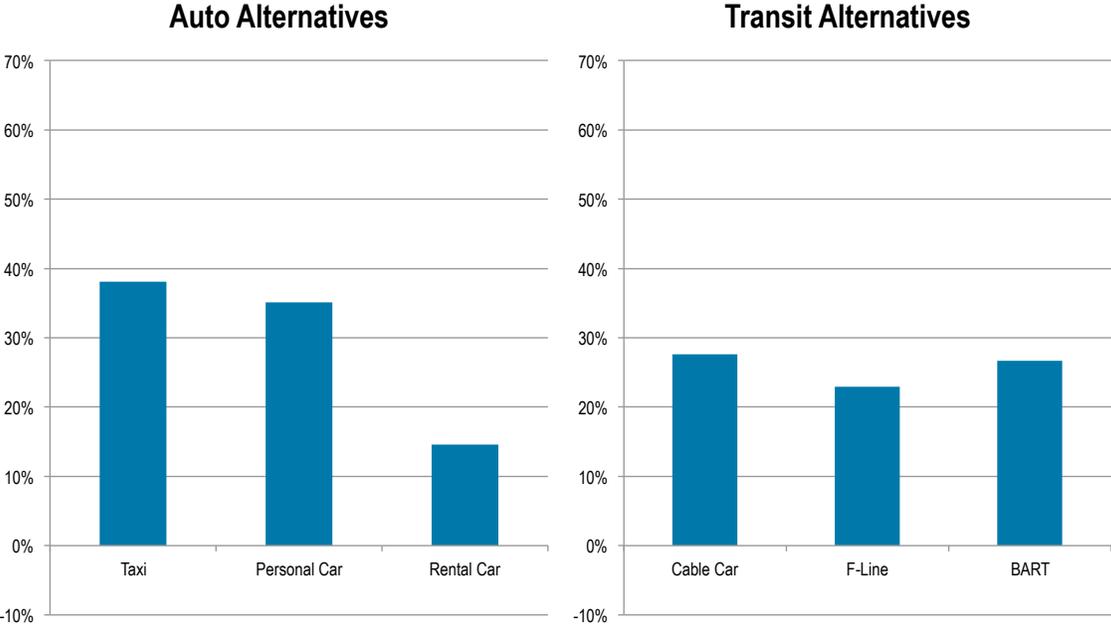
- Port Sites Popular (average 3.9 neighborhoods visited)

Most-Visited Neighborhoods



Convention and Visitors' Bureau Survey

■ Reported Transportation Use (most use several modes)



Convention and Visitors' Bureau Survey

- Complaints: 10% report issues related to traffic or transit
- Regional transit is important: 26% of SF visitors are from Greater Bay Area

Fisherman's Wharf Business Survey

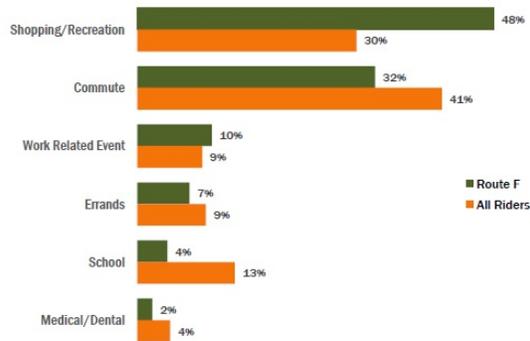
- 2014 Survey of 59 Fisherman's Wharf Community Benefit District Businesses
- Main Problems with Transit:
 - Crowding
 - Frequencies
 - Shortcomings of weekend, early morning, late night service

"My staff would benefit from easier transit from BART to the wharf. Most walk, ride a bike, or skateboard along the embarcadero but that takes time."

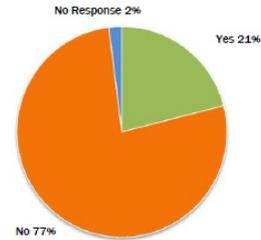
"We have had to let go a lot of people because they are not on time because of buses... Also a lot of people have had to quit because ... transportation to the pier is stressful."

Muni On-Board Survey: F-Line Results

What is the primary purpose of your trip?



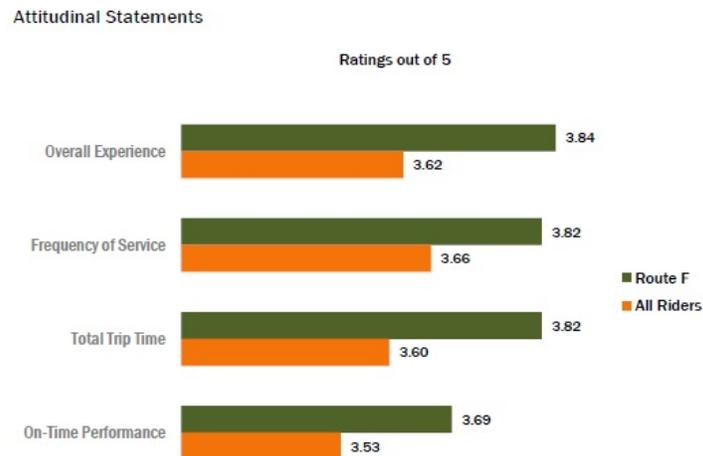
Did you transfer from a different Muni route to this one?



How did you pay your fare?

	Clipper (%)	Cash/Paper (%)
Monthly Pass on Clipper	31	
Cash Value on Clipper	19	
Cash		30
Passport or CityPASS		10
Single fare or round-trip ticket		2
Paper Transfer		2

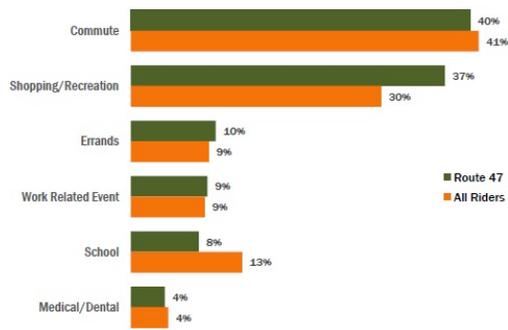
Muni On-Board Survey: F-Line Results



Muni On-Board Survey: Other Relevant Lines

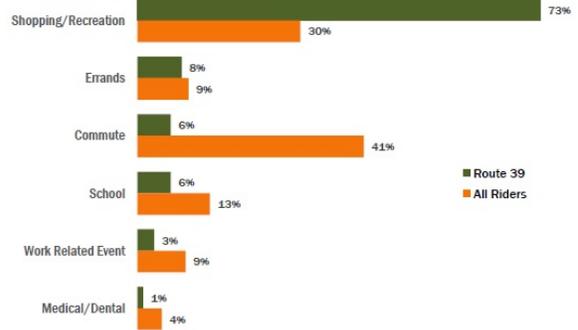
47-Van Ness

What is the primary purpose of your trip?



39-Coit

What is the primary purpose of your trip?



Plans



Transit

Muni Forward: Embarcadero Service Enhancements

Significant increase in service along Northern Waterfront

Nelson\Nygaard Consulting Associates, Inc.



Transit

Muni Forward: 8-Bayshore Frequency Increases

Image Info

Nelson\Nygaard Consulting Associates, Inc.

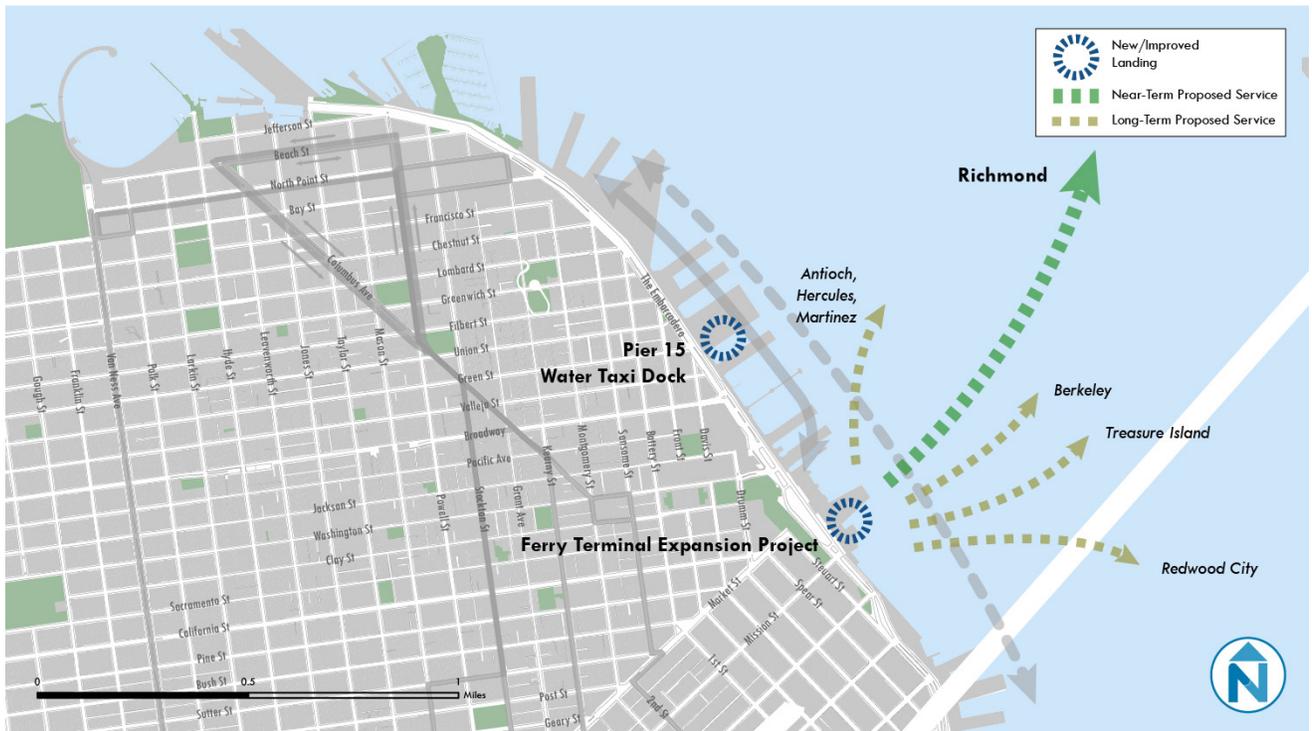


Transit

Central Subway: Potential Extension to Wharf

Study completed October 2014, funding needs to be identified

Nelson\Nygaard Consulting Associates, Inc.



Transit

Ferries and Water Taxis

Plans for major increase in East Bay service

Nelson\Nygaard Consulting Associates, Inc.

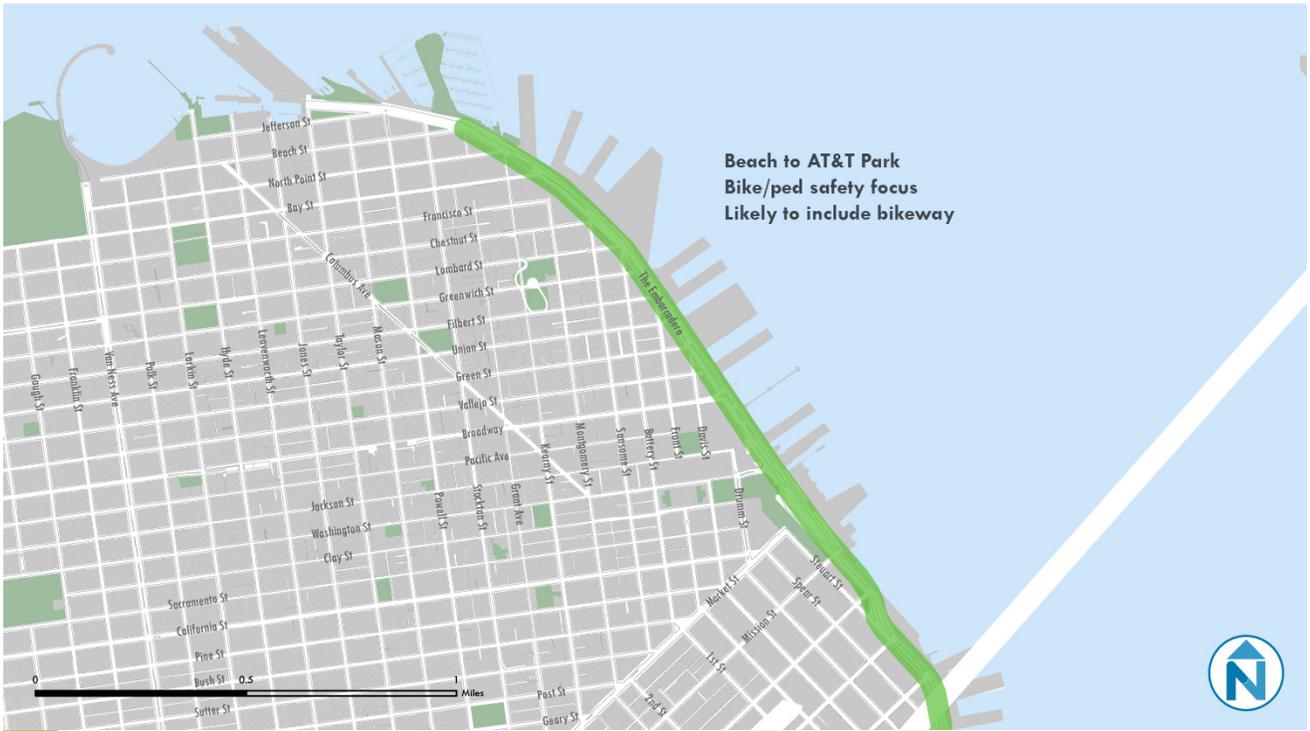
Notable Regional Transit Projects

BART

- Embarcadero/Montgomery Station Capacity Planning
- Core Capacity/Second Transbay crossing?

Caltrain

- Electrification/Increased Frequencies
- Downtown Extension



Bike/Ped

Embarcadero Enhancement Project

Ongoing planning process, public engagement

Nelson\Nygaard Consulting Associates, Inc.



Bike/Ped

Northeast Embarcadero Study

Study calls for bike, pedestrian improvements

Nelson\Nygaard Consulting Associates, Inc.

Discussion: Issues and Opportunities

- Vehicle congestion and conflicts
- Transit connectivity and capacity
- Bicycle and pedestrian barriers and conflicts

Thank You!



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Josh Karlin-Resnick, jkarlin-resnick@nelsonnygaard.com

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APPENDIX G SURVEY QUESTIONS

PORT OF SAN FRANCISCO 2015 Tenant Transportation Survey

Thank you for your interest in assisting the City and Port of San Francisco in understanding the transportation needs and challenges faced by tenants along the waterfront. All responses to this survey will be kept strictly anonymous and confidential. The survey should take approximately 15 minutes to complete and should be filled out by the business owner, manager or their designee, as we are trying to reach the person who has the best knowledge about your business operations, employees, customers, clients and deliveries.

YOUR BUSINESS

1. Identify the type of facility you are leasing from the Port. Please check all that apply:

- Office
- Storage Shed/Warehouse
- Retail
- Restaurant
- Light Industrial Processes
- Fishing Industry
- Maritime (water-based)
- Entertainment Destination
- Parking
- Other uses, or further details on use(s) identified above (please describe): _____

2. What is your location along the waterfront?

- Fisherman's Wharf (Aquatic Park to Pier 39)
- Northeast Waterfront (Pier 35 to Pier 9)
- Ferry Building Area (Pier 5 to Pier 22 ½ Fireboat House)
- South Beach (Pier 24 to Pier 40)

3. For how long have you been a Port tenant at this location?

- Less than 2 years
- 2-4 years
- 5-10 years
- More than 10 years

4. Please define your role at the business:

- Owner
- Business Manager
- Employee
- Other (please specify) _____

5. Which are your most important business days?

- Weekdays (Monday through Friday)
- Weekends (Saturdays and Sundays)
- Holidays

6. What are your primary hours of operation (check top two)?

- Weekdays (8 a.m. -6 p.m.)
- Weekdays (6 p.m. - Midnight)
- Weekdays (Midnight -8 a.m.)
- Weekends (8 a.m. -6 p.m.)
- Weekends (6 p.m. - Midnight)
- Holidays
- Other (please specify) _____

7. How many employees work at this specific location?

- 0-5
- 6-10
- 11-25
- 26-50
- 51-100
- 100+

8. Does your business offer transportation-related benefits to employees and/or customers/clients (check all that apply)?

- No
- Yes, free or discounted transit to employees
- Yes, free or discounted transit to customers/clients
- Yes, bicycle amenities such as racks or shower/changing facilities to employees
- Yes, bicycle amenities such as racks or shower/changing facilities to customers/clients
- Yes, free or discounted parking to employees
- Yes, free or discounted parking to customers/clients
- Yes, other: _____

YOUR EMPLOYEES GETTING TO WORK

9. To the best of your knowledge, please estimate the percentage of your employees that come from each geographical area to your place of business:

San Francisco (%)	_____
Peninsula (%)	_____
North Bay (%)	_____
East Bay (%)	_____
South Bay (%)	_____
Other (%)	_____

If you answered "Other" please specify below _____

10. To the best of your knowledge, please estimate what percentage of your employees uses each of the following to get to and from work:

Muni (%)	_____
BART (%)	_____
Caltrain (%)	_____
Ferry (%)	_____
Driving (%)	_____
Walking (%)	_____
Biking (%)	_____
Ride-booking services (%)	_____
Other (%)	_____

If you answered "Other" please specify below _____

11. To the best of your knowledge, how well do the transportation service categories listed in the table below currently meet the needs of your employees?

	Excellent	Good	Fair	Poor
MUNI				
BART				
Caltrain				
Ferry				
Access roads				
Parking				
Bike Facilities				
Sidewalks				
Street Lighting				

Please provide additional comments if needed: _____

12. Have any of your employees communicated to you, or have you observed, their having difficulty getting to work because of transportation and/or parking issues?

- No
- Yes (please explain) _____

YOUR CUSTOMERS/CLIENTS GETTING TO YOUR BUSINESS

13. To the best of your knowledge, please estimate the percentage of your customers/clients that come from each geographical area to your place of business:

San Francisco (%) _____
 Peninsula (%) _____
 North Bay (%) _____
 East Bay (%) _____
 South Bay (%) _____
 Other (%) _____

If you answered "Other" please specify below _____

14. To the best of your knowledge, please estimate what percentage of your customers/clients uses each of the following to get to and from work:

Muni (%) _____
 BART (%) _____
 Caltrain (%) _____
 Ferry (%) _____
 Driving (%) _____
 Walking (%) _____
 Biking (%) _____
 Ride-booking services (%) _____
 Other (%) _____

If you answered "Other" please specify below _____

15. To the best of your knowledge, how well do the transportation service categories listed in the table below currently meet the needs of your customers/clients?

	Excellent	Good	Fair	Poor
MUNI				
BART				
Caltrain				
Ferry				
Access roads				
Parking				
Bike Facilities				
Sidewalks				
Street Lighting				

Please provide additional comments if needed: _____

16. Have any of your customers/clients communicated to you, or have you observed, their having difficulty getting to work because of transportation and/or parking issues?

No
 Yes (please explain) _____

YOUR DELIVERIES

17. How many deliveries does your business receive each week?

- 1-3
- 4-7
- 8-15
- 16-25
- More than 25

18. When are the majority of your deliveries made?

- Midnight-6 a.m.
- 6 a.m. -9 a.m.
- 9 a.m. - Noon
- Noon - 5 p.m.
- 5 p.m. - 8 p.m.
- 8 p.m. – Midnight

19. What delivery access needs does your business require? (Check all that apply)

- Curb-loading
- Parking
- Large truck access
- Other (please specify) _____

20. Have any of your delivery drivers told you about, or have you observed, difficulty finding a convenient and legal place to load and unload?

- No
- Yes (please explain) _____

YOUR IMPACTS, CONCERNS AND SUGGESTIONS

21. Below is a list of previously identified transportation-related issues in and around the Port. Please indicate if each item “Greatly impacts, Impacts, Somewhat Impacts or Does Not Impact” your business.

	Greatly Impacts	Impacts	Somewhat Impacts	Does Not Impact
Vehicle congestion				
Event-related closures/back-ups on Embarcadero				
Backups/conflicts from cruise ships				
Backups during AT&T Park events				
Regional bottlenecks from Golden Gate Bridge and Bay Bridge traffic				
Transit connectivity				
Crowding on E/F MUNI lines				
Pedestrian safety				
Bicycle safety				
Delivery access				
Parking availability				
Construction				
Timeliness of employees				
Other (please specify below)				

If you selected “Other” please specify below: _____

22. When an event is taking place at the Port, Embarcadero or a nearby venue, what is the impact on your business? (Please check all that apply) [Due to an oversight, the ability to select multiple options was not enabled for this question in the survey.]

- Increased business
- Decreased business
- Employees struggle to get to work
- Customers/clients struggle to get here
- Deliveries are delayed or cannot occur
- None
- Other (please specify) _____

23. Generally speaking, how satisfied are you with the advance notice you receive when an event that could potentially impact your business is taking place in or around the Port?

- Very satisfied
- Somewhat satisfied
- Somewhat dissatisfied
- Very Dissatisfied

24. Consider the following transportation improvements and order them from 1 to 11 in order of importance to your business, with 1 being “least important” and 11 being “most important”.¹

1 2 3 4 5 6 7 8 9 10 11	Increased MUNI lines providing direct service
1 2 3 4 5 6 7 8 9 10 11	Increased MUNI service on weekends, early morning and late night
1 2 3 4 5 6 7 8 9 10 11	Increased ferry or water taxi service
1 2 3 4 5 6 7 8 9 10 11	Increased awareness about availability of nearby parking
1 2 3 4 5 6 7 8 9 10 11	Improved bicycle facilities, such as protected bikes lanes
1 2 3 4 5 6 7 8 9 10 11	Improved bicycle and pedestrian crossings of the Embarcadero
1 2 3 4 5 6 7 8 9 10 11	Increased traffic signage and/or better signalization
1 2 3 4 5 6 7 8 9 10 11	Increased traffic enforcement/direction
1 2 3 4 5 6 7 8 9 10 11	Enhanced sidewalks/ Increased street lighting
1 2 3 4 5 6 7 8 9 10 11	Improved advance traffic alert communications for special events

25. What additional transportation and/or access improvements would you suggest for the area in and around the Port and/or your business? Please provide specific locations if warranted.

26. Are there any other issues that you would like to share with us in more detail?

If you would like to be contacted to provide additional comments in person, please provide your contact information below. All of your answers to the survey will be kept strictly anonymous and confidential.

Name _____

Company _____

Email Address _____

Phone Number _____

Are there additional key staff at your business that may like to share their feedback about transportation issues? Please provide their contact information.

Name _____

Company _____

Email Address _____

Phone Number _____

APPENDIX H SURVEY VERBATIM RESPONSES

BACKGROUND

Comments were provided by survey respondents at a number of points during the survey, both as added explanations to questions and as responses to open-ended questions. They were edited only for spelling/grammar, or to remove information that would specifically identify the respondent.

The sections of comments are in the order in which the questions were asked in the survey, and are provided with context about the question.

To provide additional context, the respondent Location and Usage is provided after each comment. Abbreviations used for Locations and Usage Types are below.

LOCATIONS

FW: Fisherman's Wharf

NE: Northeast Waterfront

FB: Ferry Building Area

SB: South Beach Extended

USAGE TYPES

- Office
- Storage – Storage Shed/Warehouse
- Retail
- Restaurant
- Light Industrial – Light Industrial Processes
- Fishing – Fishing Industry
- Maritime – Maritime (water-based)
- Ent Dest – Entertainment Destination
- Parking
- "Other"

Comments have been grouped by location when the volume of responses warranted.

1. This survey question should have indicated 10 (not 11) as "most important." Respondents prioritized the ten listed improvements from 1 to 10 given the way the online survey worked.

VERBATIM COMMENTS: TRANSPORTATION FOR EMPLOYEES AND CUSTOMERS/CLIENTS

Question 8: Does your business offer transportation-related benefits to employees and/or customers/clients? (Check all that apply)

- No
- Yes, free or discounted transit to employees
- Yes, free or discounted transit to customers/clients
- Yes, bicycle amenities such as racks or shower/changing facilities to employees
- Yes, bicycle amenities such as racks or shower/changing facilities to customers/clients
- Yes, free or discounted parking to employees
- Yes, free or discounted parking to customers/clients
- Yes, other.

“Other” explanations

Multiple comments about use of commuter benefit program, including:

- We are participants in the City’s program where they can take tax free money out of their paychecks to use for transportation. Not many employees participate though. Maybe it’s a little too confusing or they like to get as much money out of their paychecks. (Fisherman’s Wharf (FW) / Restaurant)
- Pre-tax “commuter checks” (NE / Office)
- Commuter benefit program. (SB / Maritime, Ent Dest, Parking)
- We sponsor parking for senior management (FW / Retail, Aquarium)
- Commercial fishing needs a truck. (FW / Fishing, Storage Shed/Warehouse, Parking)
- About half of our employees bike to work or public transportation. The other half drive and when the trucks pull out the crew pulls their car into the truck yard. (SB / Storage, Parking)

Question 10: To the best of your knowledge, please estimate what percentage of your employees uses each of the following to get to and from work:

- Muni
- BART
- Caltrain
- Ferry
- Driving
- Walking
- Biking
- Ride-booking services
- Other

“Other” explanations/comments on how employees get to work

- Most all walk from the Ferry Bldg or Embarcadero BART or Muni or bus terminal to Pier 9. Some use multiple modes, i.e., Caltrain to BART. (NE / Office)
- Motor or sail on the water to dock (SB / Maritime)
- Two drive company vehicles. (FW / Fishing, Storage)
- Golden Gate Transit (FW / Storage)
- Remaining employees carpool together (NL / Office)

Question 11: To the best of your knowledge, how well do the transportation service categories listed in the table below currently meet the needs of your employees?

- Muni
- BART
- Caltrain
- Ferry
- Access roads
- Parking
- Bike facilities
- Sidewalks
- Street lighting

Please provide additional comments if needed

- Must park truck to unload and load heavy fishing equipment (FW / Fishing, Storage, Parking)
- There are no bike racks. We requested a bike rack by our office and were told that all bikes are expected to be housed in our office, which is difficult and counter to any green initiatives.

(NE / Office)

- Bikes on sidewalks are a problem, at least for pedestrians. Bikes not stopping at red lights are also a problem for pedestrians. Tourists are not generally the problem except that if they are in a pack of bicyclists that go through red lights they think it's okay. It's by no means all bicyclists but it is a safety challenge. SF should make sure the law is known by all (e.g., handouts to anybody renting a bike) and enforce it with officers on bikes. (NE / Office)
- There is not enough street lighting around Pier 48. (SB / Office, Storage)
- Traffic congestion and parking unavailable particularly during AT&T Park events and employees of UC Hospital (SB / Maritime)
- Too many road closures and traffic hassles due to baseball. Seriously impacts activities on south piers all the way through pier 60. (SB / Maritime, Storage)

Question 12: Have any of your employees communicated to you, or have you observed, their having difficulty getting to work because of transportation and/or parking issues?

If yes, please explain

Fisherman's Wharf (FW)

- Absolutely. The tricky part is down near Pier 39. Public transportation is not as easy to use. People that commute via ferry or BART have issues getting there. The F line works in the morning, but in the evening it's not convenient because of high tourist use. There are really not a lot of options other than the F line, so I'd say lack of options is the biggest issue. For folks who do drive the traffic on the Embarcadero has gotten worse over the last few years. It can easily take 45 to an hour to get to the Bay Bridge. Transportation is definitely one of the largest issues we hear about from employees. (FW / Office)
- Sometimes transit lines are not working, buses don't come in a timely manner, traffic is too congested, etc. (FW / Ent Dest)
- Hours of work don't necessarily work with hours of available transportation (FW / Storage)
- Recently, the bridge work has affected BART and the cost of parking has increased. (FW / Office, Storage, Retail, Ent Dest)
- The F-Line does not have enough capacity to meet demand during peak periods. Employees are often forced to walk to/from BART from the Wharf because trains are full or are running way behind. MUNI should increase capacity by using regular MUNI Streetcars interspersed with historic streetcars. (FW / Ent Dest)
- BART is too late (FW / Fishing)
- BART and MUNI are very unreliable. Parking garages and meters are too expensive for most of our employees (FW / Office)
- Weekend events and tourist related stuff make transportation nearly impossible for fishermen (FW / Storage, Maritime, Fishing, Parking)
- Intimidating & violent passengers (FW / Ent Dest)
- Chapel area permit parking not enforced (FW / Storage Shed/Warehouse, Fishing, Maritime)
- There aren't enough spaces at Fisherman's Wharf. If you have a parking permit many times the spaces are unavailable. (FW / Storage, Fishing, Parking)
- It's a continual issue but for different reasons, for different days and for different times of the year (FW / Restaurant)
- Most all of them? (FW / Storage, Retail, Restaurant, Light Industrial)
- During fishing seasons there are not enough parking at Hyde Street Harbor for fishermen (FW / Fishing)
- Parking issues (FW / Office, Storage, Fishing, Maritime, Parking)
- We need to move off of Fisherman's Wharf to Pier 48, all fishing companies. Too many folks walking the streets (which is good for business) when large trucks are entering and exiting the Pier 45. We have out grown the area. Large fishing seasons greatly conflict with tourists which one day could result in a major accident. Too much congestion! Parking is a mess, there are folks parking in Building D that have nothing to do with the fishing industry. Now having said that, since the parking is contracted through an independent company, perhaps everyone is allowed to park in B-D. A reason a lot of us (fishing people) are forced to park in B-A. (FW / Storage, Fishing)
- Driving is becoming difficult due to the number of bike lanes being added to the streets causing congestion. (FW / Restaurant)
- All the time Fisherman's Wharf area is a joke (FW / Storage)
- There is little to no "free" parking overnights here any more & the parking expense adds up. Even with paying for parking there is insufficient parking in the B sheds (FW / Storage)
- Events in the Fisherman's Wharf area create very difficult problems for employees to get to work by vehicle, walking and biking (FW / Office, Storage, Restaurant)
- Difficult to transit from Fisherman's Wharf to southern waterfront (FW / Storage, Fishing)

- Typical commuter traffic - accidents slow down the flow, etc. (FW / Storage, Maritime, Parking)
- There is no reliable time estimate for the commute due to the random events that occur in traffic. Too many 'adverse events' in the way drivers operate their cars. (FW / Office, Retail, Maritime, Ent Dest)
- Excessive traffic on Taylor between Bay and Jefferson (FW / Storage)
- Not parking issues, primarily traffic along the Embarcadero waterfront. (FW / Parking)

Northeast Waterfront (NE)

- BART delays often cause problems. BART cars often cannot accommodate bikes. Traffic issues south of Market and/or Games day traffic often causes delays in bus service. (NE / Restaurant)
- We start at 1-2am public transportation doesn't run. The port doesn't have enough parking (NE / Storage, Fishing, Parking)
- No facilities convenient to the needs of bay view boat club (SB / Maritime)
- BART, Muni, Caltrain breakdowns & back-ups. Ferry from Vallejo full, having to wait for next one. Parking is not an issue for any of us. (NE / Office)
- Muni is sporadically on time, F Line is difficult during heavy tourist times, and runs inconsistently and requires long waiting times. Access Roads are difficult during commute hours. Bay and southbound Embarcadero gets ugly and backs up causing delays to Kearny and Francisco Street parking garages. (NE / Office)
- Overcrowded Embarcadero on cruise ship days. Overcrowded BART and MUNI facilities. (NE / Maritime, Parking, Special Events)
- The F line is absolutely terrible for our commuters. Many have had to walk the 1.5 miles from Market to their offices since the F is too full or horrifically late (20+ minute wait). The F line is overcrowded, and two of our interns in the past year have been pick-pocketed on the line. It has been a major issue for our office. (NE / Office)
- Not enough parking available (NE / Fishing)
- Embarcadero and surface street traffic is bad and getting worse (NE / Office)
- Nothing too significant our out of the ordinary. Public transportation in San Francisco and access to Pier 9 are generally very good. There are always a small percentage of people that comment negatively from time to time but in general transportation and parking are very good. (NE / Office, Storage, Light Industrial, Parking)

Ferry Building Area (FB)

- Late bus service, interrupted BART service, changes in ferry schedules, no parking available, too expensive (FB / Office, Storage, Retail, Restaurant, Parking)
- Major complaints about BART being delayed or over crowded. Also that parking is too far away - and across busy streets (FB / Office, Retail)
- F line trains jammed with tourists get on & fill up train so it does not stop at additional stops along the Embarcadero to pick up any other people. Often two or three other train cars will go by before one has a little room to take additional riders waiting at the various stops along the Embarcadero! (FB / Office)
- Difficult to get to work when BART or Muni is delayed. (FB / Office, Retail)
- BART station parking lots are full oftentimes (FB / Office)
- Everyone complains about BART - quality of ride, crowded cars, etc. Also parking complaints - too expensive. (FB / Retail)
- BART parking areas are problematic, many times they get there and the lots are full. (FB / Office)
- Unreliable service in the mornings of Muni and BART (FB / Office)
- Mainly traffic and bus issues. (FB / Maritime)
- Parking is extremely expensive and the options are limited. It would be beneficial to have some kind of discounted parking for Port tenants (FB / Office)
- No or limited expensive parking (FB / Maritime)

South Beach Extended (SB)

- Mostly on Sundays with MUNI. Their Sunday morning schedule is too late starting in the morning. Of course, the baseball traffic is congested. When the Warrior stadium comes on line, it will be even more difficult to park our trucks. (SB / Office, Parking)
- BART and Muni not running on time. (SB / Storage)
- Bicycling and scooter/motorcycles have trouble with the old rail tracks on Illinois St. from 16th south to Cesar Chavez. Very dangerous. Easy to get caught in, especially when a car is double parked in the bike lane. (SB / Office, Light Industrial)
- There is both bad traffic congestion and no available parking. See previous (SB / Maritime)
- Member volunteers cannot find parking due to congestion of UC Hospital, traffic congestion from AT&T Park, special events, limited spaces, etc. (SB / Maritime)
- Parking is full 6 am (SB / Storage)
- Too many road closures and traffic routing anomalies due to baseball games. (SB / Storage, Maritime)
- Too much traffic on special event days and too many neighborhood area closures for special events. (SB / Office)
- Frequently difficult for employees and trucks to get in or out do to runs or other athletic events that seem to not need to notify tenants before hand. (SB / Storage, Special Events)
- Parking (SB / Art studio)
- Traffic has steadily increased over the past few years. Commute times have increased 50%. (SB / Maritime)
- One of the biggest complaints expressed from employees is the difficulty in commuting - congestion on highways, unpredictable traffic in SF city streets, particularly along The Embarcadero, crowding on BART and Muni. (SB / Office, Maritime, Ent Dest, Parking)
- Increased gridlock (due to double parked vehicles, crazy people roaming into traffic, and poor drivers) excessive construction delays, parking challenges, and bad roads (SB / Office)
- If come on duty in middle of the night, they must drive. Muni may not operate service then. (SB / Transportation)

Question 13: To the best of your knowledge, please estimate the percentage of your customers/clients that come from each geographical area to your place of business:

- San Francisco
- Peninsula
- North Bay
- East Bay
- South Bay
- Other – please specify

Numerous “no clients visit the location” responses:

- We are a distribution center. We have no walk-in customers (SB / Storage)
- No retail customers, service and maintenance provider for city and county of SF (SB / Storage)
- None. It's all delivery. (NE / Fishing)
- Sales to retailers throughout US & Canada (FB / Parking, Office)
- We have very few clients come to our office, not statistically meaningful. However, we travel to client sites regularly. Generally, within SF we walk or use taxi, Uber or public transit. For clients outside of SF we use Zipcar. (NE / Office)

- Numerous “tourists” or out-of-state locations:
 - Visitors to the bay area. (FW / Restaurant)
 - So California (FW / Office, Storage, Restaurant)
 - Mostly the tourist trade, out of town, out of state, and many from out of country (FW / Storage, Maritime, Parking)
 - National and International travel (FW / Restaurant)
 - Our customers come from every direction, from Reno to Los Angeles and in between. (FW / Fishing, Storage)
 - Tourists (FW / Retail, Fishing)
 - Out of State, Sacramento, Santa Cruz, Los Angeles (NE / Office)
 - Out of bay area (NE / Office)
 - Tourists from outside the bay area (FB / Office, Storage, Retail, Restaurant, Parking)
 - Merchant seamen off ships in the Anchorage and coming from airports (SB / Maritime)
 - Out of state. (SB / Office, Maritime, Entertainment, Parking)
 - Clients fly to SFO, meet with us and return to place of origin (SB / Office)
- The customers come from all over in equal proportions (FW / Fishing)
- My fish buyer/broker would be better able to answer this (FW / Storage, Fishing, Parking)
- Sailors arrive by boat to participate in regular season racing and Regattas (SB / Maritime)
- Sailors come from all over to participate in racing season and special Regattas on the water. (SB / Maritime)
- I have visitors from all above. (SB / Office)

Question 14: To the best of your knowledge, please estimate the percentage of your customers/clients that use each of the following to get to and from your place of business:

- Muni
- BART
- Caltrain
- Ferry
- Driving
- Walking
- Biking
- Ride-booking services

Other – please specify

- Don't know - we never ask our visitors this question (FW / Storage, Maritime, Parking)
- Flights/SFO (NE / Office)
- We drive to our customers' home. Rarely do customers come to our office. (SB / Office, Parking)
- By boat (SB / Maritime)
- Taxi or Uber (SB / Storage)
- Hired shuttles (SB / Office, Maritime, Ent Dest, Parking)
- Rental car, taxi or privately hired vehicle (SB / Office)

Question 15: To the best of your knowledge, how well do the transportation service categories listed in the table below currently meet the needs of your customers/clients?

- Muni
- BART
- Caltrain
- Ferry
- Access road
- Parking
- Bike facilities
- Sidewalks
- Street lighting

Please provide additional comments if needed

- During gridlock there is no access road. (FW / Storage)
- We drive to our customers and move the home. They rarely come to us. (SB / Office, Parking)
- Visitors, not arriving by boat, have boating gear requiring driving and find inadequate parking (SB / Maritime)
- The sidewalks are poor due to the excessive stench of urine, vomit and sometimes feces. The comment I hear most frequently from visitors (my clients) is how dirty the city is and how aggressive our street bums are. (SB / Office)

Question 16: Have any of your customers/clients communicated to you, or have you observed, their having difficulty getting to your business because of transportation and/or parking issues? –

Yes (please explain)

Fisherman's Wharf (FW)

- We do surveys each year and have found that traffic over the past few years has ramped up considerably, especially on a Saturday or Sunday. It gets gridlocked where the Embarcadero goes down in lanes. From an office perspective, a lot of them will take taxis. Not a lot of options for public transportation. (FW / Office)
- F-Line is overcrowded and inaccessible at times. Driving to/from the Wharf has become increasingly difficult. (FW / Ent Dest)
- Not with parking, except the expense. There are quite a few garages for customers to use. Many use public transportation. The F line is over crowded. The addition of the E line on the weekend has been good, but we'll have a better measurement once the Giants start playing again. With the E line, it's a simple straight shot. With the F line there's a little bit of transfer. Adding the E line is a help and I hope they make it a seven day a week program. (FW / Restaurant)
- Driving can be difficult due to the number of lanes being eliminated causing gridlock. (FW / Restaurant)
- Too much traffic (FW / Restaurant)
- Customers have to wait too long in traffic coming from the Embarcadero. Lights are not timed. (FW / Restaurant)
- Mostly people not observing traffic rules. It's much better when traffic SFPD help at the intersections. (FW / Storage)
- Only due to bad traffic issues (FW / Office)
- Daily, congestion, too many cars, too many trucks, no where to park, daily complaints. This is the 21st century, turn Pier 45 into a hotel, shops, fishing history etc. etc. etc. You would make your money back ten fold. Move us to Pier 48, closer to the bridge, closer to major freeway access, closer to the airport, better parking, rid all the daily problems with parking, tourists, trucks etc. It's the only way to solve port issues. (FW / Storage, Fishing)

- The traffic on the Embarcadero impedes their access to the wharf when they are coming from both the East Bay and Pacifica especially when a ship is in dock. Customers do not like the lack of parking. (FW / Fishing)
- Over crowding of parking at pier45 (FW / Storage, Fishing, Maritime, Parking)
- There is very limited parking. Some of my vendors won't come to pier45 because of the parking/traffic mess (FW / Storage, Fishing, Parking)
- Occasionally we get feedback through social media that parking is too expensive, which makes a visit to Pier 39 very expensive for families visiting. (FW / Ent Dest)
- Cost of parking and parking availability (FW / Office, Storage, Retail, Ent Dest)
- Fisherman's wharf area (FW / Storage)
- There is little room for customer trucks to load, etc.. (FW / Storage)
- Occasionally parking is a problem (FW / Office, Storage, Restaurant)

Northeast Waterfront (NE)

- They are often late to meetings at our office, or cannot get on the F line for at least 2-3 trains as they do not stop since they're too full. (NE / Office)
- The lights on the Embarcadero need to be timed to facilitate traffic flow. Particularly between 2am and 6am. THERE IS NO CROSS TRAFFIC BUT VEHICLES ARE FORCED TO WAIT FOR LONG PERIODS (NE / Fishing)
- Getting anywhere on The Embarcadero during uncoordinated events is extremely difficult. (NE / Office)
- Traffic getting through the city and parking is limited and expensive (NE / Office)
- Not enough parking (NE / Storage, Fishing, Parking)
- We rarely have clients come to our offices but generally the comments are either (1) finding street parking or (2) walking on the Embarcadero. Generally, not an overwhelming problem. (NE / Office)
- Our clients know that our area is difficult to travel to during heavy tourist times. (NE / Office)

Ferry Building Area (FB)

- Embarcadero is most always stopped up with traffic, and parking lots are full by 9am...so they have a lot of difficulty finding parking. (FB / Office)
- Parking is very expensive for our clients. This makes in-office meetings a challenge (FB / Office)
- No parking, expensive parking, inconvenient, mass trans too crowded (FB / Office, Storage, Retail, Restaurant, Parking)
- We get parking complaints all the times - that its too far away - that it makes shopping here inconvenient. (FB / Office, Retail)
- F line overcrowding problems as enumerated in previous question (FB / Office)
- Too expensive meters (FB / Maritime)
- BART & lack of close by parking major complaints (FB / Retail)
- Traffic on Embarcadero (FB / Maritime)

South Beach Extended (SB)

- Mucho congestion on 3rd St (SB / Office)
- Limited access for boaters at Bay View Boat Club (SB / Maritime)
- Traffic congestion, unavailable parking (SB / Maritime)
- Boaters who hope to get out on the water first deal with heavy traffic congestion and extremely costly or unavailable parking. (SB / Maritime)
- They all have trouble getting around San Francisco in general. (SB / Office)
- Parking occupied (SB / Storage)
- BART and Muni not running on time. (SB / Storage)
- No street signs to get to pier 70, Noonan building (SB / Art Studio)
- Parking temporary during events (SB / Art creation)
- Mainly Parking (SB / Storage)
- Traffic has increased greatly over the past few years. Traffic jams caused by SF Giants games wreak havoc on traffic in our area. (SB / Maritime)
- With events, we **OFTEN** have people calling saying they are running late - often due to bridge, city and The Embarcadero traffic. (SB / Office, Maritime, Ent Dest, Parking)
- The comments they make are primarily related to the entire city, not just my office. They are very surprised at how long it takes to travel across and through the city. (SB / Office)

VERBATIM COMMENTS: DELIVERIES

Question 19: What delivery access needs does your business require? (Check all that apply)

- Curb-loading
- Parking
- Large truck access

Other (please specify)

- All the above, which creates congestion. (FW / Storage, Fishing)
- Water access (FW / Fishing)
- On-Trac, FedEx, UPS, messenger - nothing big (NE / Office)
- Unloading of 40' and 60' new buses for testing & acceptance (SB / Transportation)

Question 20: Have any of your delivery drivers told you about, or have you observed, difficulty finding a convenient and legal place to load and unload? - Yes (please explain)

Fisherman's Wharf (FW)

- Constantly, Jefferson Street between Taylor and Jones is a mess and a constant area of contention. Something seriously needs to be done (FW / Office, Storage, Restaurant)
- Deliveries are also one of the major pain points. There aren't a lot of places for them to stop. One of the unique things about where Pier 39 is on the Embarcadero is where the lane crunches down, crosses the F line, and the F line shares the road for a block or two. Delivery drivers can't block the F Line track. They end up double parking until 11 a.m. until the SFMTA comes along and tickets them. (FW / Office)
- The time restrictions of driving onto Pier 39 make it difficult for drivers to unload. (FW / Ent Dest)
- Loading until 11am only here (FW / Retail, Fishing)
- Difficulty with the time frame demands on being able to deliver. Every time there appears to be a change in the rules of delivery. Drivers are extremely frustrated (FW / Fishing)
- Alley becomes overcrowded with big rigs and employee parking (FW / Storage, Fishing, Maritime, Parking)
- Difficult to access Coast Marine and Pier 45 shed access (FW / Storage, Fishing)
- Wharf parking (FW / Fishing)
- Access to pier45 is very problematic. It can be a real mess at times (FW / Storage, Fishing, Parking)
- DAILY, DAILY, DAILY, DAILY NOWHERE TO PARK. WE NEED TO MOVE OFF PIER 45 AND RELOCATE TO PIER 48, SIMPLY MAKES MORE SENSE THEN NOT. (FW / Storage, Fishing)
- Limited (FW / Office, Fishing, Maritime)
- Congestion from the tour buses causes a back up. (FW / Office, Storage, Retail, Ent Dest)
- Again getting in and out of area (FW / Storage)
- Same story, it's damn near impossible to get trucks in & out of this pier (FW / Storage)
- There are no yellow zones on our block (FW / Restaurant)
- Delivery drivers whine constantly about making a path through all the tourists to do their job. (FW / Office, Retail, Maritime, Ent Dest)

Northeast Waterfront (NE)

- Need more commercial parking on Embarcadero. Why are smaller delivery trucks (4 wheels instead of 6) being punished for efficiency when using commercial parking spaces? We get at least 2 tickets a week for not using big trucks. (NE / Fishing)
- They often cannot find a place to stop near Pier 33 and 35 (NE / Office)
- Not enough parking (NE / Storage, Fishing, Parking)

Ferry Building Area (FB)

- Can pull behind the Ferry Bldg but often there are back ups. No delivery available on Saturday. Security is terrible dealing with delivery. (FB / Office, Storage, Retail, Restaurant, Parking)
- We have a limit on delivery times - so drivers complain all the time that they need more than 30 minutes to make the deliveries. We also can only allow so many trucks at once in our delivery area - so that means if it is packed in delivery area the drivers have to circle the Embarcadero (FB / Office, Retail)
- Loading zone full always (FB / Maritime)
- There are limited legal parking areas in front of the property for loading and unloading. (FB / Office, Retail)
- Need a white zone (FB / Maritime)
- When receiving large equipment- two of our deliveries were ticketed while loading in front of the building. Due to the weight and size of the delivery- this simply had to be delivered in front. This caused a problem with our partners that were making the delivery (FB / Office)
- Limited options for parking around the pier for delivery (FB / Office)

South Beach Extended (SB)

- No, just inability to get across The Embarcadero at times. (SB / Storage, Special Events)
- No loading zone (SB / Maritime)
- The nearest area is a fire lane (SB / Maritime)
- There is no nearby loading (SB / Maritime)
- No elevators (SB / Art studio)
- No parking available on our street (SB / Storage)
- We have truck loading/unloading facilities. (SB / Maritime)
- I think most delivery drivers just accept that they will have to double park to unload. (SB / Office)
- Bollards on Tulare St. prevent access to 1399 Marin St. warehouse. (SB / Transportation)

VERBATIM COMMENTS: TRANSPORTATION IMPROVEMENTS, CONCERNS AND ISSUES

Question 21: Below is a list of previously identified transportation-related issues in and around the Port. Please indicate if each item “Greatly impacts, Impacts, Somewhat Impacts or Does Not Impact” your business.

- Vehicle congestion
- Event-related closures/back-ups on Embarcadero
- Backups/conflicts from cruise ships
- Backups during AT&T Park events
- Regional bottlenecks from Golden Gate Bridge and Bay Bridge traffic
- Transit connectivity
- Crowding on E/F Muni lines
- Pedestrian safety
- Bicycle safety
- Delivery access
- Parking availability
- Timeliness of employees

Other (please specify below)

- Permit parking not enforced. (FW / Storage, Fishing, Maritime)
- Bicycles and motorized scooter (with one foot on and one foot off) along the Embarcadero walkways are need speed limits and enforcements. (FB / Office, Parking)
- Traffic and parking greatly limits access to bay and boaters (SB / Maritime)
- Pier 70 events causing disruption of access to rental space (SB / Art creation)
- Bicyclists and pedestrians blatantly disregard traffic signals and laws increasing congestion and the hazards of driving. (SB / Maritime)

Question 22: When an event is taking place at the Port, Embarcadero or a nearby venue, what is the impact on your business? (Please check all that apply)

- Increased business
- Decreased business
- Employees struggle to get to work
- Customers/clients struggle to get here
- Deliveries are delayed or cannot occur
- None

Other (please specify)

Fisherman's Wharf (FW)

- No parking (FW / Fishing)
- Survey says check all that apply but refuses to take the answers - customers/clients struggle to get here, deliveries are delayed or cannot occur, decreased business (FW / Fishing)
- Increased Business AND Employees struggle to get to work AND Customers struggle to get here (survey only allowed ONE choice, not multiple choices). (FW / Ent Dest)
- This page only allows one item to be checked. Events cause decreased business and impact accessibility to the location. (FW / Restaurant)
- It would not let me check all that apply... employees struggle, customers/clients struggle & deliveries are delayed (FW / Storage)
- Employees struggle, customers struggle, deliveries cannot, decreases business because of the blocking of streets/ closure (FW / Office, Storage, Restaurant)
- 1. depends where the venue is 2. same as 1. 3.same as 1. 4. same same (FW / Storage)

Northeast Waterfront (NE)

- Primary impact is crowding on public transit - Muni & BART - employees cannot get to work or get home, so leave early. (NE / Office)
- We expect special events to gum up the system. (NE / Office)

Ferry Building Area (FB)

- This did not allow me to check all that apply. To answer this really depends on event - if there is a road detour because of a cruise ship than that clogs up the Embarcadero - making it hard for people to get here from north bound embarcadero. If there is a blue angels event - then business increases. (FB / Office, Retail)

South Beach Extended (SB)

- Deliveries and employees unable to cross the Embarcadero during runs and races. (SB / Storage, Special Events)
- We usually can work around several events (baseball games, races and special events) that take place several weekends each year on Terry Francois Blvd. (SB / Office, Parking)
- I want to check "decreased business", and "customer/client struggles" and "deliveries delayed" - all due to AT&T Park, but I cannot select multiple answers on this question for some reason. (SB / Storage, Maritime)
- Only able to check one, but two apply: 1) employees struggle to get to work 2) deliveries are delayed or cannot occur (SB / Office)
- Employees struggle to get here; Customers/clients struggle to get here; Deliveries are delayed or cannot occur (the poll will not allow more than one choice) (SB / Maritime)
- Question is not allowing multiple selections: should be increased biz, emp struggle to get to work, customers struggle to get here; deliveries are delayed. (SB / Office, Maritime, Ent Dest, Parking)
- We plan ahead and navigate around the impasse...most of the time. (SB / Office)

Question 26: What additional transportation and/or access improvements would you suggest for the area in and around the Port and/or your business? Please provide specific locations if warranted.

Fisherman's Wharf (FW)

- Additional muni service. F line not useable going back to the Financial District from a commuter perspective. Something as simple as another Muni line to go to the Financial District and back. Please do not take lanes of traffic and convert them to bike lanes. We do our own traffic surveys and have found such a small proportion of people that come to Pier 39 via bikes. The detriment impacting traffic is pretty significant. I know it's a big part of the Port working group that is going on now. They need to find something that is safe for bikes but does not impede traffic. The timing of lights tends to be rather frustrating. Especially in the afternoons in the evening, the timing appears to be the same as the morning and it shouldn't be. (FW / Office)
- The Wharf has needed high capacity streetcar service practically since the F-Line was opened. Headways improved slightly when the E-Line began but much improvement is needed if the service hopes to meet visitor and employee expectations and needs. (FW / Ent Dest)
- Traffic officers between Bay and the Embarcadero (FW / Ent Dest)
- Make sure you have traffic officers on the weekends on the wharf. This is imperative because it keeps the traffic flowing. (FW / Restaurant)
- The traffic control officers are so few and unorganized and don't have a plan in place to really improve the movement of traffic. At AT&T Park they have 42,000 people and have traffic control officers everywhere and they override the traffic lights. They make sure everyone stops or moves. At the wharf they don't control the lights, they aren't in control, they don't have a plan. At AT&T Park it's well orchestrated. During Fleet Week, the biggest story on the news was the nightmare of getting people through Fisherman's Wharf. During holidays and busy weekends, they need a plan to control that problem. Make Bay Street a one way, get people out of there as easy as you get them in. They need to override traffic lights. (FW / Restaurant)
- We would benefit from a new Transbay terminal located in the Fisherman's Wharf area. (FW / Office, Retail, Maritime, Ent Dest.)
- Traffic control between Taylor and Jones on Jefferson Street needs some serious attention (FW / Office, Storage, Restaurant)
- City government & planners are more concerned about the Bicycle Coalition then they are about true transportation needs. They will give special consideration to the SF Giants and other events when in fact Fisherman's Wharf draws far greater people year round. (FW / Restaurant)
- Parking, parking, parking. No tour buses allowed on the Embarcadero (FW / Storage, Fishing, Parking)
- A MOVE TO PIER 48 WOULD SOLVE ALL PROBLEMS FOR ALL FISHING COMPANIES. (FW / Storage, Fishing)

Northeast Waterfront (NE)

- There needs to be more F/E lines, or a rapid bus from the Ferry Building to Pier 39 or the Alcatraz terminal. Bikes also do not observe the traffic signals on the Embarcadero, and more than once I've narrowly missed being hit by a bike while having the right of way at the cross walk. (NE / Office)
- More commercial parking near pier33 (NE / Maritime)

Ferry Building Area (FB)

- Short term parking nearby for clients and tenants of Ferry Building, at a discounted rate. Enough to provide for a meeting. This is very important and would be incredibly beneficial (FB / Office)
- Speeding enforcement of bicycles. (FB / Office, Parking)
- Improved business signage on street side. (FB / Maritime)
- A much needed and promised parking garage for inexpensive customer parking at the Ferry Building (FB / Office, Storage, Retail, Restaurant, Parking)
- Look to other city examples & practices. We need to enforce bike stopping at red lights at cross walks, the green bike lane is so dangerous - it should be separate from the cars somehow. Also Bikes & pedi-cabs should not be on the Embarcadero sidewalk - they also hot people everyday. Deliveries are a part of the way the real estate along the embarcadero works - need to make sure that BCDC & Port understand the real practicalities of operating the buildings along the waterfront. (FB / Office, Retail)

South Beach Extended (SB)

- Please remove, or at least asphalt over, the old rail tracks on Illinois St. between 16th St. and Cesar Chavez. These are very dangerous for bicycles, motorcycles, and scooters. With all the new building, there are more double parkers in the bike lanes with drop-offs at apts. and deliveries. Too easy to get caught in the tracks and then possibly hit by vehicles coming from behind.
(SB / Office, Light Industrial)
- Allow tenants at the Pier 50 Admin. Building (410 Terry Francois) to park in the large AT&T parking lot when our lot is overflowing (SB / Office)
- Some events are required to plan (ISCOTT) and notify local business, the sporting events seem to be immune from such requirements. Getting to Pier 30-32 is extremely difficult at times. Moving anywhere around AT&T Park and pier 48 requires advance planning, and while the baseball schedule is published, the special event schedule seems to be a big secret. (SB / Storage, Special Events)
- More lighting and security cameras in the ballpark area. More police patrols in the ballpark area. (SB / Office, Parking)
- Need loading zone, parking (SB / Maritime)
- We are good as things are. (SB / Storage)
- Allow customers and workers to park in Port of SF parking areas outside of Port business hours. (SB / Storage, Maritime)
- Cheaper rents (SB / Storage)
- Quotation 25 is flawed on this survey. My actual response is "1" least important for all. (SB / Storage)
- As events increase along the waterfront traffic and parking will become more challenging. The arena planned at 16th Street is going to cause many problems. The waterfront can only handle so much development. (SB / Office)
- Better coordination of special events so that they don't bunch up. (SB / Office)
- Have a survey done of 1399 Marin St. to determine the legal boundaries of SWL 354, Tulare St., Indiana St., Tennessee St., and make it available to the SFMTA. Thank you. (SB / Transportation)
- Improve traffic flow after SF Giants games. It takes one hour to go one mile from Pier 50 to get on the Bay Bridge after a Giants game. Increase enforcement of pedestrian crossings of street corners (they ignore flashing red signals and hold up turning traffic). Increase enforcement of bicyclists who ignore stop signs, red lights, traffic direction, and ride on sidewalks. (SB / Maritime)
- Better signage around pier 70. (SB / Art Studio)
- Lighting, signage (SB / Art creation)

Question 27: Are there any other issues that you would like to share with us in more detail?

Fisherman's Wharf (FW)

- The biggest problem with getting to the wharf is the traffic and confusion by Pier 39. The lane shifting around Bay and Beach streets is very confusing and the stop lights are extremely long in that area. It's a bottleneck. Even when the Embarcadero is busy on the weekend, it flows well and then it bottlenecks horribly around Pier 39. And then you toss a cruise ship in there. The frustrating part is driving in the Pier 39 area. People just want to kill themselves its so frustrating. (FW / Restaurant)
- Make sure Traffic Control Officers are at Fisherman's Wharf on busy days and institute a program to train them sufficiently. (FW / Restaurant)
- Blocking of streets during special events and the attitude of the control personnel dealing with business trying to get goods to their businesses and working with employees of these businesses (FW / Office, Storage, Restaurant)
- New parking subcontractors pier 45 are unprofessional (FW / Storage, Fishing, Maritime)
- Pier 39 is a unique challenge because of where the roadways all converge. Events like 4th of July and Fleet Week also one of the most traffic headaches. They draw huge crowds. Dreamforce or those type of events tend to price traditional consumers out. Sunday Streets is very detrimental. It clogs up the traffic for some of the guests coming to Pier 39. It displaces our normal visitor. We don't see a significant increase in guests. (FW / Office)
- The homeless sleeping in front of Pier 45 is getting bad. There are several mentally ill visitors some of which threaten my employees lives A direct quote from more than one of them is " I'm going to kill you ". I have worked with the public all my life. This situation is not uncommon but it can rule out some employees I would like to hire. (FW / Ent Dest)
- Get rid of all the homeless bums. There behavior is discussing and an embarrassment to our beautiful city and my beloved Fisherman's Wharf (FW / Storage, Fishing, Parking)
- HOMELESS ISSUES (FW / Office, Fishing, Maritime)**
- Most important business days--again depending on season it could be every day but this option was not given (FW / Fishing)
- MOVE TO PIER 48. GET US OFF PIER 45, TOO MANY PEOPLE, TOO MANY HOMELESS, TOO MANY CARS, TRUCKS ETC. CRAB SEASON IS A TOTAL CLUSTER MESS (FOR BETTER WORDING). LARGE FISH SEASON SUCH AS CRAB, SALMON HERRING ETC. CREATE CONGESTION AND IT IS TIME TO MOVE. (FW / Storage, Fishing)**

Northeast Waterfront (NE)

Ferry Building Area (FB)

- Time for an over all traffic & transit study with how the entire waterfront works now. (FB / Office, Retail)
- Barriers and speed signs need to be put up for bicycles and other moving things. (FB / Office, Parking)
- Ability to be more flexible on signage on the street. (FB / Maritime)
- We really need to deal with the homeless problem...it is getting worse. Theft is a big problem. The FB is ground central because of the water, bathrooms, tourists to panhandle, etc.. We need to find a solution to helping these people stay off streets. (FB / Office, Storage, Retail, Restaurant, Parking)

South Beach Extended (SB)

- Thank you for asking for our input. It is appreciated. (SB / Storage, Maritime)
- The current northbound side of Embarcadero should only be opened to human-powered vehicles and pedestrians. Emergency vehicles could easily gain access when necessary and delivery trucks could access during designated hours. Meanwhile, the current southbound side could accommodate four lanes of auto traffic with arrows/lighting that may change based on demand. (e.g. four lanes one-way southbound on Saturday/Sunday 4pm-8pm). Additionally, the bike coalition could get their protected bikeway in next to the F Market line. Thank you for the consideration. Always open to discuss more! :) (SB / Storage)
- Better tenant notification, in advance, of street closures for any purpose. Events must make provisions for business to cross the Embarcadero to get to locations such as Pier 26-28, Pier 30-32. A 5 to 10 minute wait with notice is acceptable. An hour wait because the traffic officer is having a bad day is not. (SB / Storage, Special Events)
- Traffic in area during games, events, etc.!!! (SB / Artist studio)
- Rent too high (SB / Storage)
- Better lighting around the Noonan building for safety - please and thank you! (SB / Art studio)
- Traffic in our area will be a disaster if the Warriors relocate down the street, particularly on days when there will be events in both the ballpark and the stadium. (SB / Maritime)
- Increased space for a small business. (SB / Storage)
- A newsletter announcing all events at pier 70 including activities at Noonan building open to the public and the SomArts space. We see pier 70 as a focal point of creativity where the art disciplines of music, dance, painters, poets, art students, arts professionals and the general public gathered together sharing inspiration (SB / Art creation)



The Report on the Northern Waterfront Transportation Survey Analysis presents background on the survey and summarizes the survey results by four geographic areas along the northern waterfront that have different tenant characteristics and transportation conditions. The Report also includes a technical appendix, which presents greater detail on the survey results, as well as supplemental information regarding the survey background and survey administration.

You can access the full transportation survey report and other relevant information on the Port's website, posted under the Transportation heading: <http://sfport.com/waterfront-plan-archives>

For more information on the Port's Northern Waterfront Plan, visit: <http://sfport.com/waterfront-plan-update>