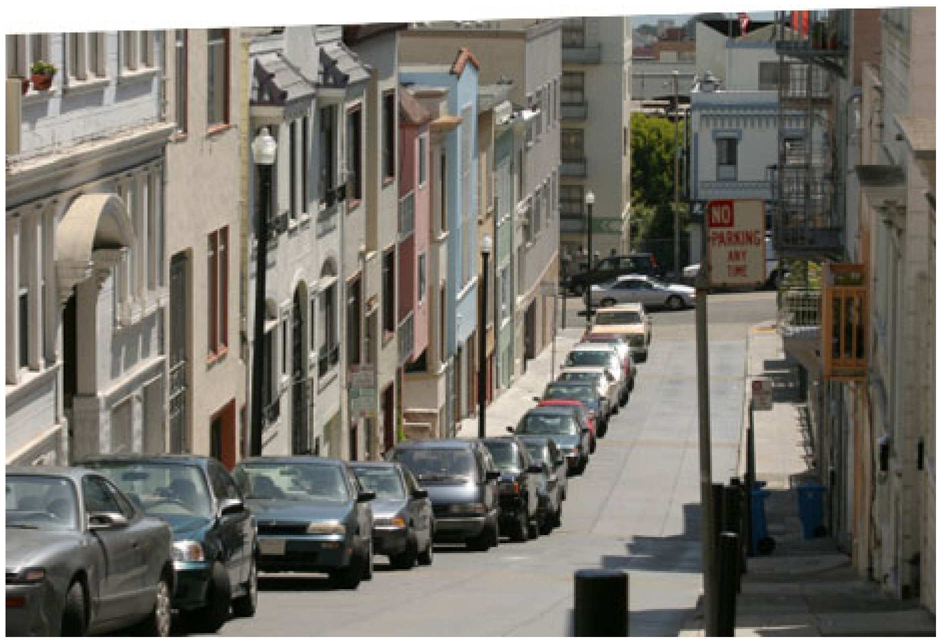
Parking Conditions in San Francisco



San Francisco County Transportation Authority

GAO Parking Hearing

July 23, 2007

Presentation Outline

- SF Parking Availability
  - Field Studies
  - Market Research
- Strategic Policy Choices
- Potential Solutions

Select Neighborhood Parking Conditions

Neighborhood	Census 2000[1]							
	Pop	Residents per Acre	Employed	Median HH Income	Mode Share			Off-street
Bernal Heights	19,170	41/acre	59%	$63,800	56% Auto	30% Transit	14% Walk/Bike	Few private garages, commercial lots
Cow Hollow	18,800	38/acre	70%	$95,800	53% Auto	30% Transit	17% Walk/Bike	Small Public Lots
Hayes Valley	12,300	56/acre	50%	$46,700	40% Auto	37% Transit	24% Walk/Bike	Large public Lots
West Portal	5,646	18/acre	63%	$97,000	60% Auto	26% Transit	17% Walk/Bike	Small Public Lot

1) Source: Census 2000 Journey to Work

Neighborhood Parking Conditions

Parking availability is a problem, to varying degrees, in all.

Neighborhood	Parking Occupany[2]				
	Residential			Commercial	
	AM	Midday	PM	Midday	Evening
Bernal Heights	99% wkdy	63% wkdy 80% wknd	77% wkdy	87% wkdy 96% wknd	87% wkdy
Cow Hollow	92% wkdy	94% wkdy 98% wknd	93% wkdy	93% wkdy 99% wknd	97% wkdy
Hayes Valley	80% wkdy	84% wkdy 86% wknd	93% wkdy	82% wkdy 82% wknd	78% wkdy
West Portal	42% wkdy	71% wkdy 84% wknd	73% wkdy	91% wkdy 96% wknd	84% wkdy

2) Source: Field surveys conducted by WSA Feb., Mar. and Apr. 2006

Neighborhood Parking Conditions

Neighborhood Turnover and Duration: Inefficient Utilization

Neighborhood	Ave Vehicle Turnover Over a Six Hour Period				Ave Vehicle Duration Per Space			
	30 Min Space	1 Hour Meter	2 Hour Meter	2 Hour Limited	30 Min Space	1 Hour Meter	2 Hour Meter	2 Hour Limited
Bernal Heights	5.1 vehicles	5.4 vehicles	n/a	1.5 vehicles w/permit 3.8 vehicles	0.7 hours	1.2 hours	n/a	6+ hours w/permit 1.7 hours
Cow Hollow	n/a	n/a	5.1 vehicles	1.6 vehicles w/permit 3.3 vehicles	n/a	n/a	1.4 hours	6+ hours w/permit 2.4 hours
Hayes Valley	2.9 vehicles	3.4 vehicles	n/a	2.0 vehicles w/permit	1.0 hour	1.7 hours	n/a	3.6 hours w/permit
West Portal	8.0 vehicles	n/a	6.2 vehicles	1.9 vehicles w/permit 3.1 vehicles	0.7 hours	n/a	1.4 hours	3 to 6+ hours w/permit 1.75 hours

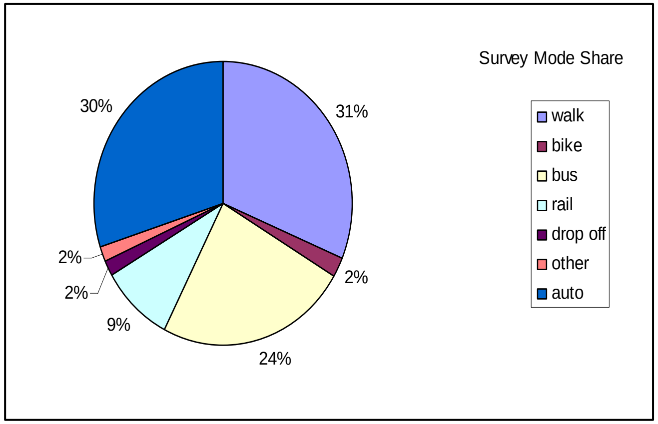
- **Turnover** - Evaluates efficient use of space (# of vehicles utilizing a space).
- **Duration** - Evaluates effectiveness of time limits/enforcement (average time vehicle is parked per space).

SFMTA | DPT

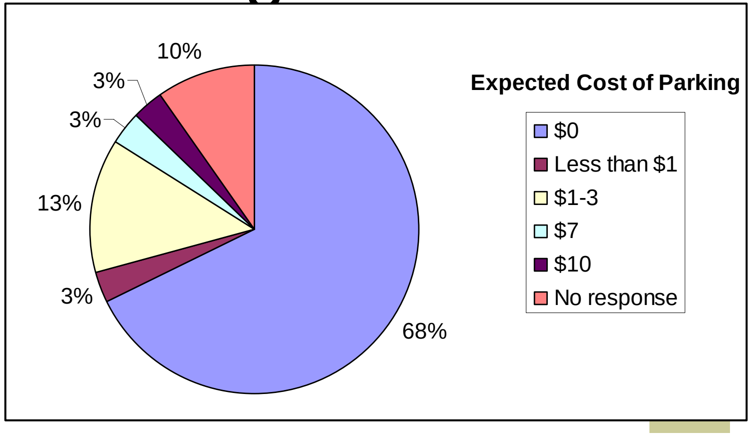
Intercept Survey

Neighborhood Parking Characteristics Reported

- Majority of those surveyed did not come by car
  - 30% Came to neighborhood by car
  - 70% Came by other modes

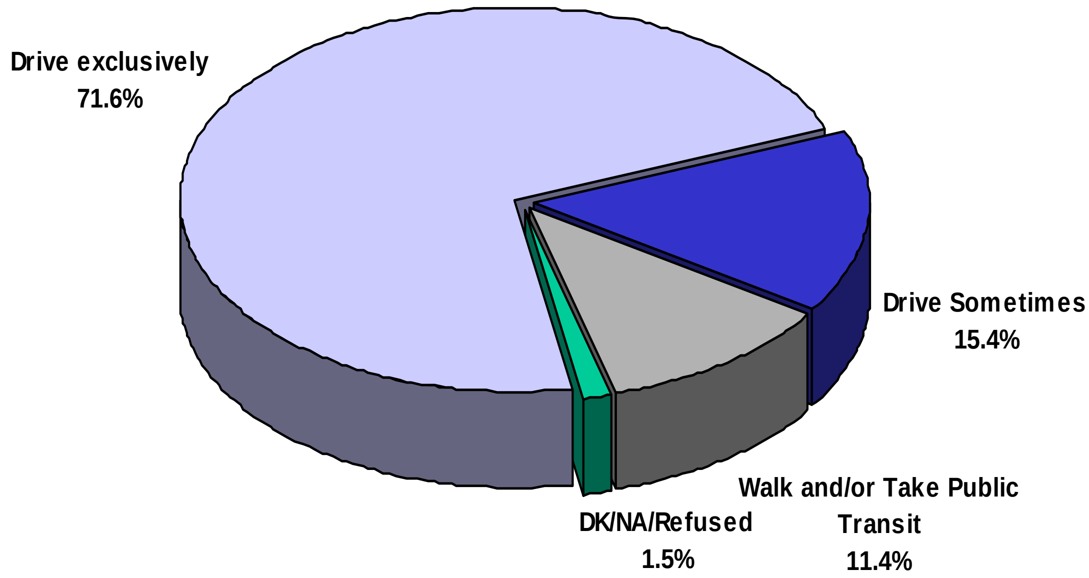


- Of those who drove expected free parking in neighborhoods.
- Circulation from parking searches is significant.
  - Over 50% of drivers took more than 5 minutes to find parking
  - 60% agreed or strongly agreed it was difficult to find parking



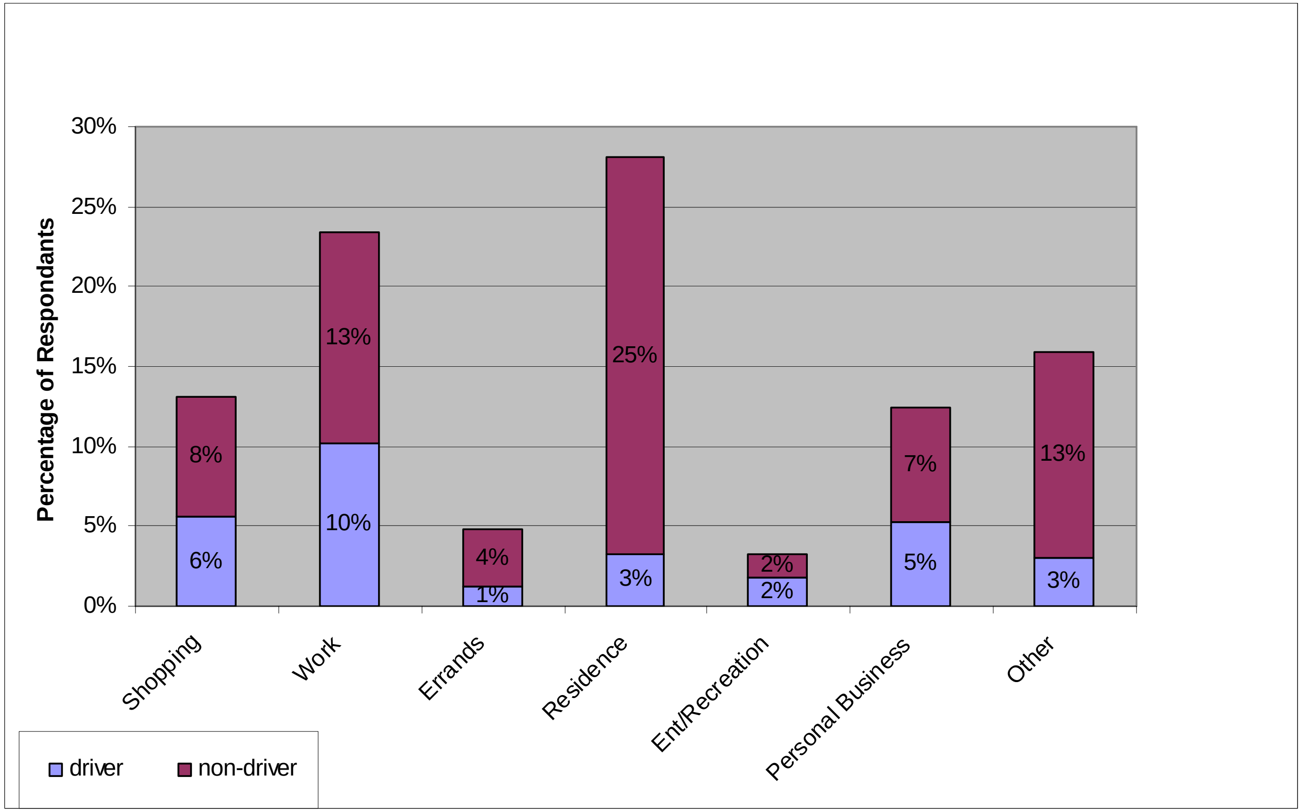
Market Research

- Businesses believe majority of their customers drive exclusively, yet…



Intercept Survey: Trip Purpose

Drive trips are primarily work trips by employees; and Shoppers are more likely to come by foot or transit than by car.



Market Research

General Parking Priorities:

- Residents' Ranking of Priorities:
  1) Availability
  2) Longer Time Limits
  3) Safety
  4) Convenience
  5) New Technology

- Businesses Ranking of Priorities:
  1) Availability
  2) Safety
  3) Convenience
  4) Longer Time Limits

Potential Solutions

- Regulate un-regulated parking spaces
- Adjust/remove parking time limits
- Increase price of parking: on street meters and RPP
- Install new payment technology
- Establish parking benefit districts
- Shared parking
- Improve enforcement
- Add off-street spaces (price appropriately)

Supply vs. Manage

- Downtown Plan
  - Doubled office space in 15 years from late 60’s to mid 80s without adding substantial supplies of parking
  - Transit investment
  - Pedestrian improvements
  - Downtown accessibility is high
- Today’s Challenge: Housing Development/QoL
  - Affordable housing
  - Quality of Life
  - Transit First/Transit Priority
  - Environmental quality

Willingness to Pay

Willingness to Pay: *Stated Preference*

- Both residents and businesses were willing to pay more for availability (~ $0.50 to $1 more per hour)

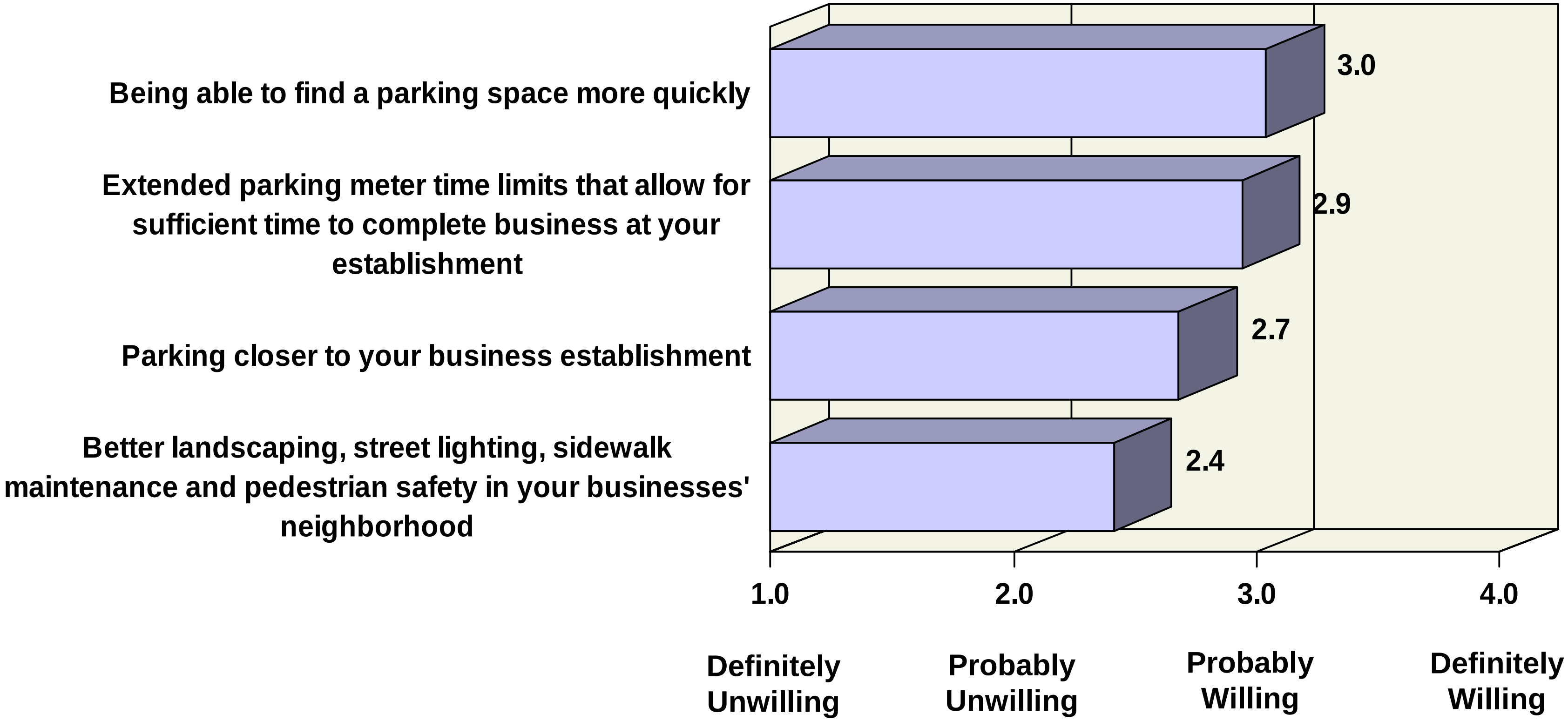
- In the study neighborhoods, willing to pay is higher (~$1 to $3 more per hour)

Willingness to Pay: *Revealed*

- Port of San Francisco demo of new technology and rates shows even higher willingness to pay (up to $5/hr.) than stated preference surveys show

Citywide Market Research

Business owners believe there is some willingness for their customers to pay more for parking improvements.



Parking in San Francisco

On-Street Parking Supply in San Francisco	
Type of Parking Space	**Quantity**
Total On-Street Parking	320,000 (includes meters)
White zones	1,600
Yellow/Green zones	4,400
Blue zones	540
Metered spaces[1]	23,000

City Owned Parking Garages in San Francisco	
Downtown	2,600
Shopping District	7,450
Civic Center	1,460
Other Areas	3,610
Total Spaces	15,120

Source: MTA, San Francisco Transportation Fact Sheet, March 2006; SF City Owned Garages.

Parking in San Francisco

- Four Meter Zones
  - $3.00/hour, Downtown
  - $2.50/hour, Downtown Periphery
  - $2.50/hour, Fisherman's Wharf
  - $1.50/hour, all other meters

- Generally Operates from 7:00, 8:00 or 9:00 AM to 6:00 PM Mon to Sat (some exceptions).
- Parking meter revenue $24.1 million (FY 04-05)
- Meter fines $40 per violation, around 560,000 meter citations issued each year

Parking Research

- Parking observations at 4 neighborhood types in San Francisco
  - Parking utilization, turnover and duration observations
  - Randomized 400-person intercept surveys
- Mail survey of 24,000 random households
  - Conjoint method to assess willingness to pay
  - Very high response rate for typical mail surveys (12%)
- Phone interview 200 merchants

Perception vs. Reality

- **Perception**: There is no parking in the neighborhoods
- **Reality**: While it is true that each neighborhood had some on-street parking crunches, there is also evidence that drivers want *free/low-cost* parking.
  - Paid parking is generally available (garages/private spaces). LISA to ADD Detail.
  - Drivers have an expectation of free parking and are willing to "cruise" for on-street spaces.

Perception vs. Reality

- **Perception**: Customers exclusively drive to businesses
- **Reality**: Majority of surveyed population did not drive to neighborhoods and employees are more likely to drive thanother groups.

Perception vs. Reality

- **Perception**: There is a need to build more parking

- **Reality**: Building parking is expensive:
  - Surface ($10k/space)
  - Structured ($35k-$50k/space)
  - Underground ($50-75k/space)

And, Parking Management has been shown to work:

- Better regulation and enforcement, e.g.:
  - Pricing to encourage shift to off-street parking, transit use
  - Better enforcement
- Shared parking
- New meters with more convenient payment methods
- Parking Benefit Districts

Supply vs. Manage

Strategic Choices:

- Add/Build Supply:
  1) Expensive: Average Cost per Space
  2) Poor use of land
  3) Hinders transit ops and pedestrian circulation
  3) Generates car travel

- Manage:
  1) No infrastructure costs
  2) Consumer choice
  3) Flexibility
  4) Community buy in/benefits
  5) Tailored to community