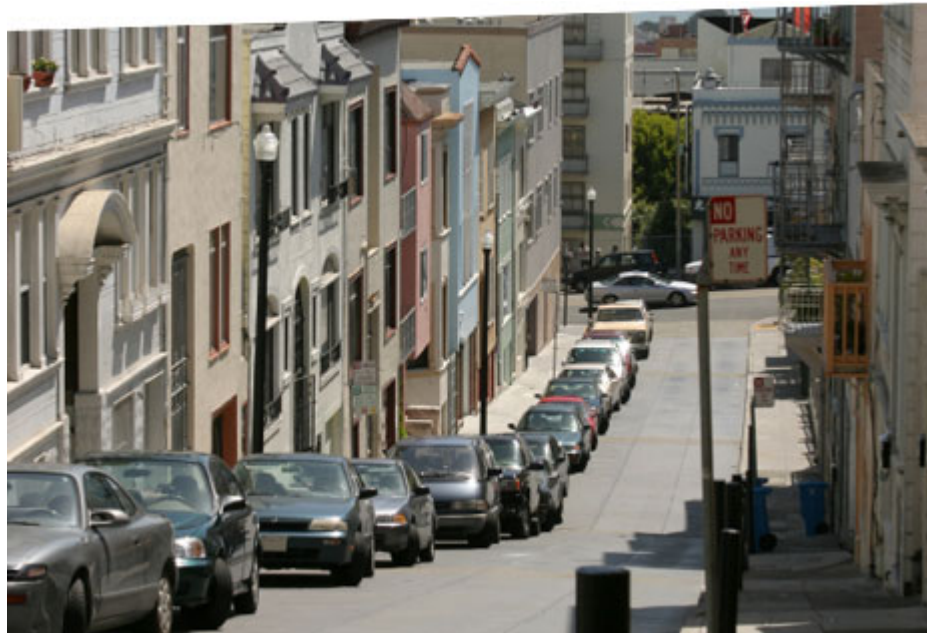


# Parking Conditions in San Francisco



San Francisco County Transportation Authority

GAO Parking Hearing

July 23, 2007

# Presentation Outline

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

# Select Neighborhood Parking Conditions

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

1) Source: Census 2000 Journey to Work



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# Neighborhood Parking Conditions

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

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

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



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# 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	0.7 hours	1.2 hours	n/a	6+ hours w/permit
				3.8 vehicles				1.7 hours
Cow Hollow	n/a	n/a	5.1 vehicles	1.6 vehicles w/permit	n/a	n/a	1.4 hours	6+ hours w/permit
				3.3 vehicles				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	0.7 hours	n/a	1.4 hours	3 to 6+ hours w/permit
				3.1 vehicles				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).



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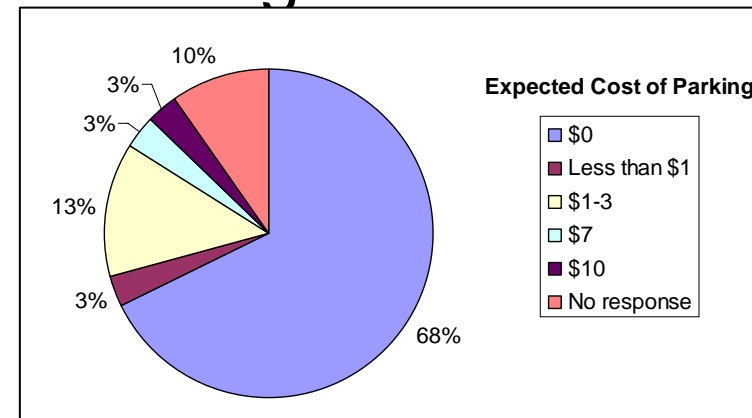
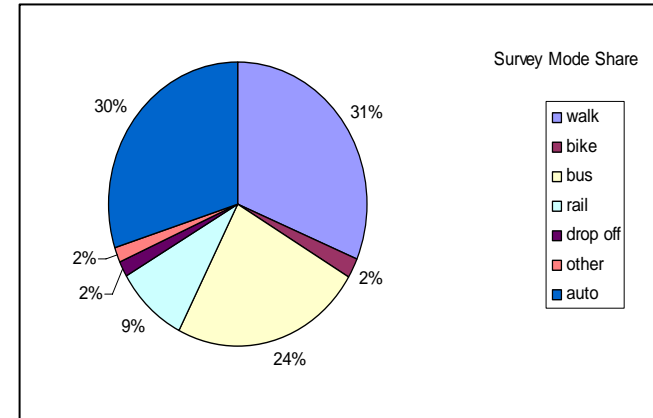


# Intercept Survey



## 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



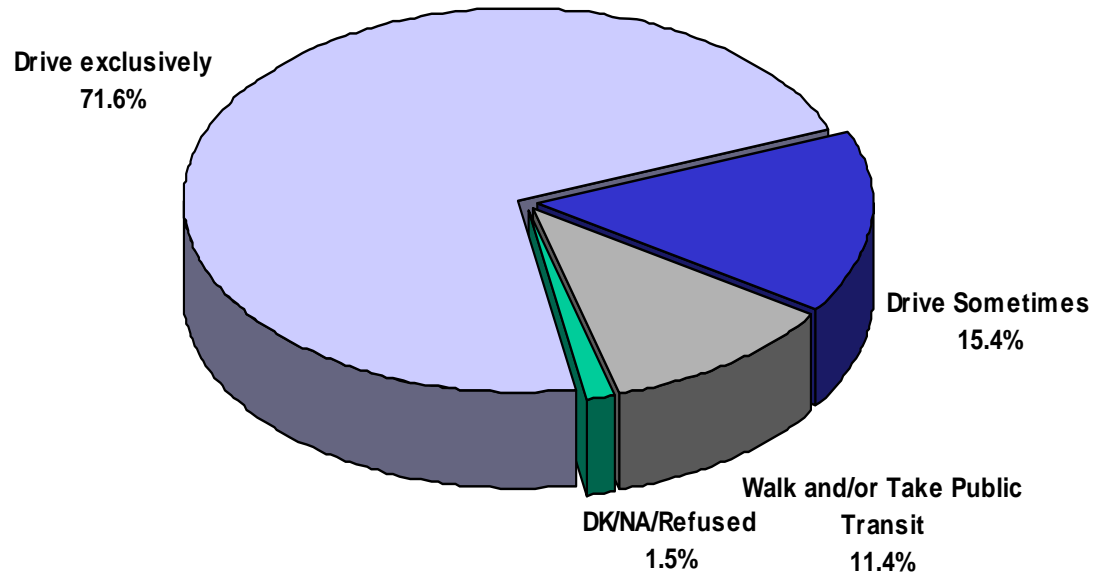
# Market Research



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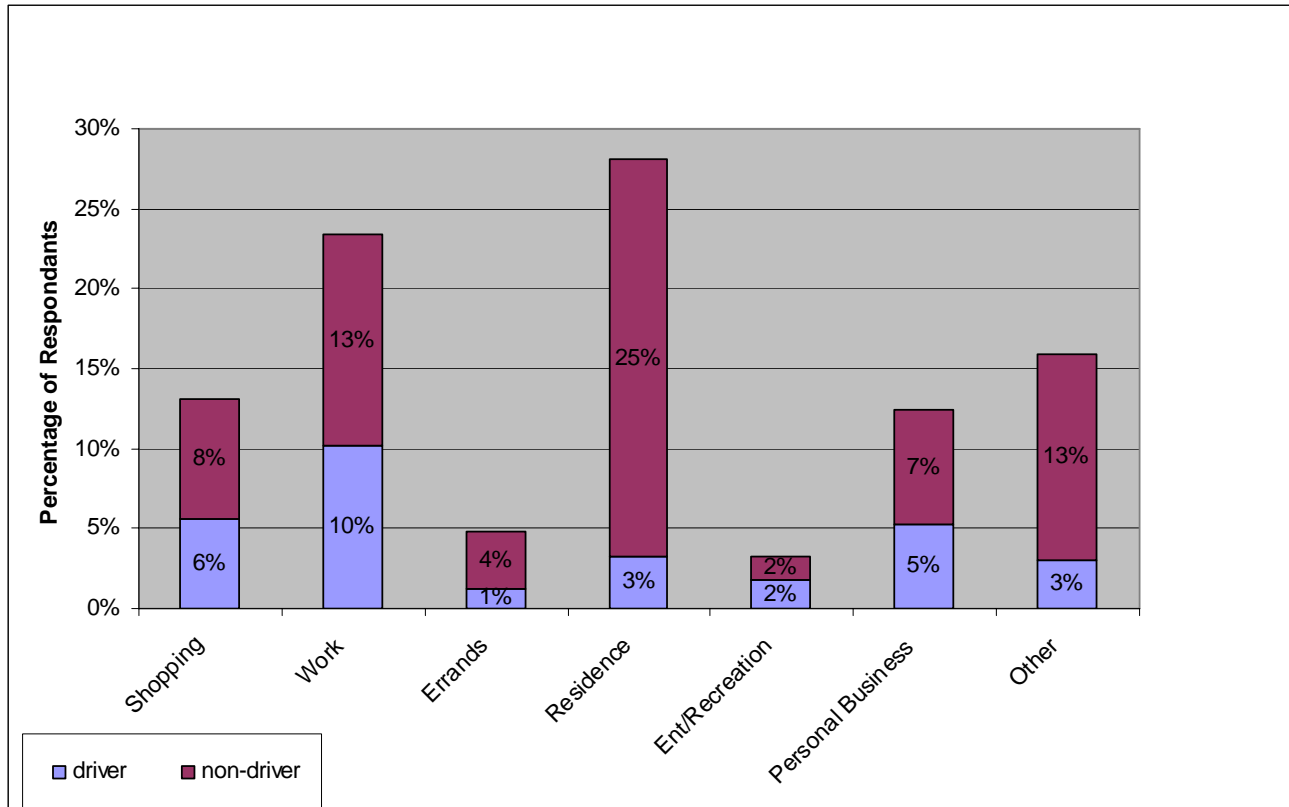


- ◆ Businesses believe majority of their customers drive exclusively, yet...



# 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



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## 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



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- ◆ 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



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- ◆ 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



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## 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)

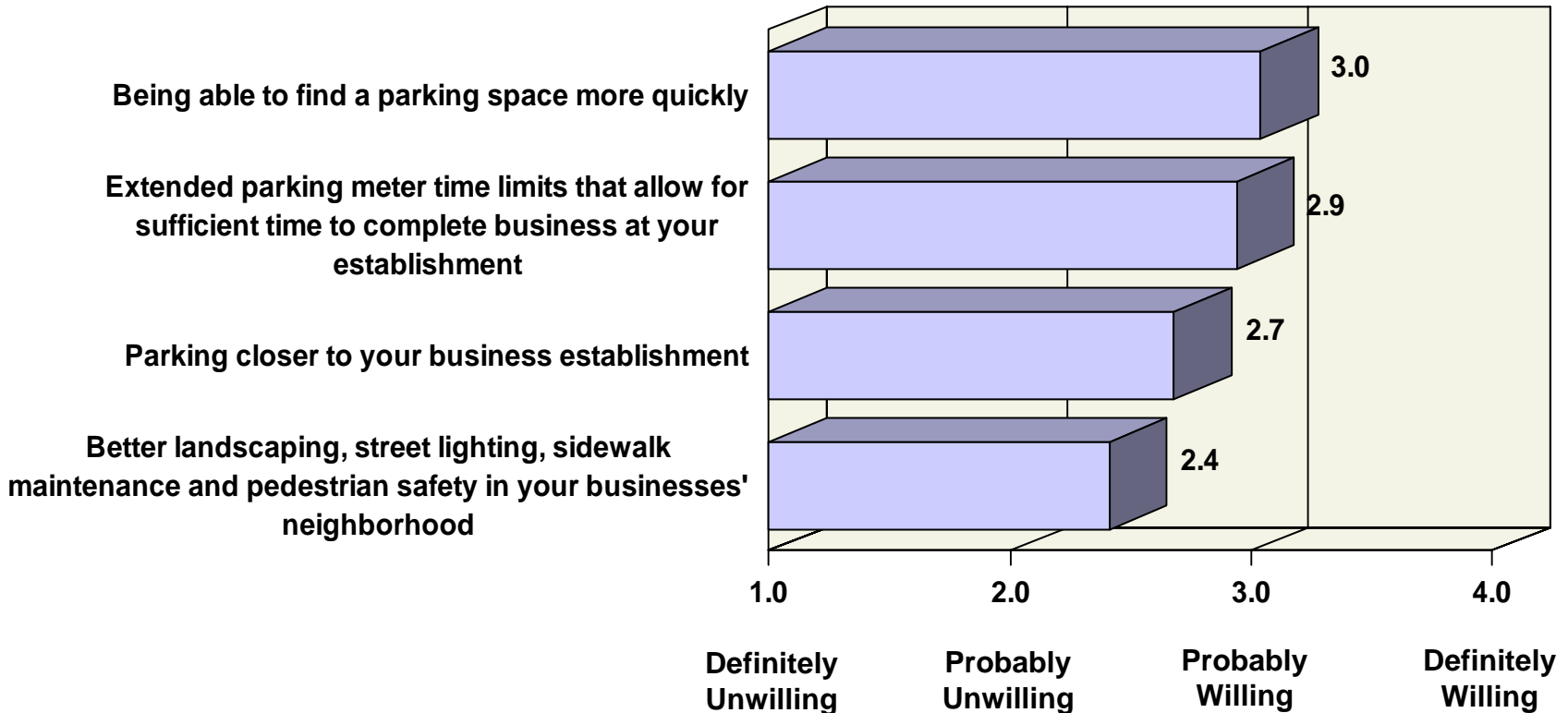


## Willingness to Pay: *Revealed*

- ◆ 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



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



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

# Parking in San Francisco



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- ◆ 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



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- ◆ 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



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- ◆ **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

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

# Perception vs. Reality



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- ◆ **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



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## 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