

MEMORANDUM

July 7, 2017

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

FROM: Elaine Forbes
Executive Director

SUBJECT: Informational presentation on a recent study of parking trends around Seawall Lots 322-1, 323, 324 and 321 and parking and transportation options after three of the lots' parking stalls are removed to develop the lots to meet the goals/objectives of the Waterfront Land Use Plan

DIRECTOR'S RECOMMENDATION: Informational Only – No Action Required

EXECUTIVE SUMMARY

This memorandum is provided in response to Port Commission's direction to staff to study the effects of the removal of approximately 351 parking spaces at Seawall Lots 322-1 and 323/324 in the area bound by The Embarcadero, Broadway, Front, and Vallejo Streets. Approximately 40 to 50 parking spaces from the nearby City lot will also need to be removed. The removal of about 401 parking spaces from these lots is needed to make the lots available for the development of new affordable housing, hotel, theater/restaurant, commercial and open space uses. A team of consultants with requisite expertise conducted the study on parking and transit options as part of the broader Port Waterfront parking and transportation demand management study relating to the ongoing efforts to update the Port Waterfront Land Use Plan (the "WLUP").

The study confirms that limited or no replacement parking in proposed developments for the lots do align with the City's Transportation Demand Management (TDM) Ordinance which emphasizes reliance on transit, discourages car trips, and prohibits parking in developments located in transit-rich locations. It reviews the current parking trends in and around the lots and indicates that about 1,389 parking spaces are currently available in the area and that about 988 spaces would likely be available after the removal of 401 spaces from the three lots. This review indicates that, with or without

the development of these three lots, Port parking revenue in the area may decline slightly over time given the new and projected transit choices including car-sharing, autonomous vehicles, and personal transportation devices. It concludes by recommending options for managing the near-future parking demand and for transitioning to increased reliance on transit in keeping with the City's TDM. With the options, Port tenants, visitors, and patrons of the area's businesses and attractions are expected to have safe and convenient access to the Waterfront after the lots are developed. Highlights of the recommendations include:

- **Manage the transition with existing lot users** through early and regular communication about the available parking locations in the area and through the provision of parking-related wayfinding.
- **Promote and incentivize transit and mobility choices** to encourage biking, walking, car sharing and alternative modes of transportation (i.e. carpooling, transportation network company services, personal transportation devices, and micro transit like Chariot) through incentives.
- **Increase efficient management of all parking assets** through valet operations, parking densification technologies, and optimization apps.
- **Prepare for multimodal and autonomous vehicles** by encouraging the use of shared vehicles and pooled services. Incentivize the use of shared travel modes of all kinds and plan for the needs of shared modes by proactively working with San Francisco Municipal Transportation Agency (SFMTA) to pilot curb management approaches.

Strategic Objective

It is the Port Commission's practice to review the projected effects of developments under its jurisdiction. This review of parking trends and transit options responds to the goals of the Port's Strategic Plan as follows:

Livability: The review provides information to help manage the transition of using the lots for parking to being developed for affordable housing, theater, hotel, and retail/commercial and park. These new uses promote affordable housing, support performance art, activate the area, provide living wage jobs for residents, and opportunities for local business enterprises.

Sustainability: The review promotes transportation demand management practices that emphasize reliance on transit in transit-rich locations.

BACKGROUND

On March 11, 2014, by Resolution No. 14-16¹, the Port Commission approved a Memorandum of Understanding ("MOU") between the Port and the Mayor's Office of

¹ <http://sfport.com/ftp/meetingarchive/commission/38.106.4.220/modules/Item%2011C%20SWL%20322-1%20MOU-documentid=7738.pdf>

Housing and Community Development (the “Housing Office”) for the development of affordable housing on Seawall Lot 322-1. The MOU includes, among other things, the exploration and feasibility testing of including public parking in the development proposed for this lot to address the projected loss of parking spaces in the area. A review of the affordable housing development proposed for this lot revealed that the inclusion of public parking is financially infeasible, i.e., projected parking revenue does not justify the financial investment required to include a public parking garage. To increase the number of affordable units at this location and provide some of the units for seniors, the nearby City lot was added to the development of SWL 322-1.

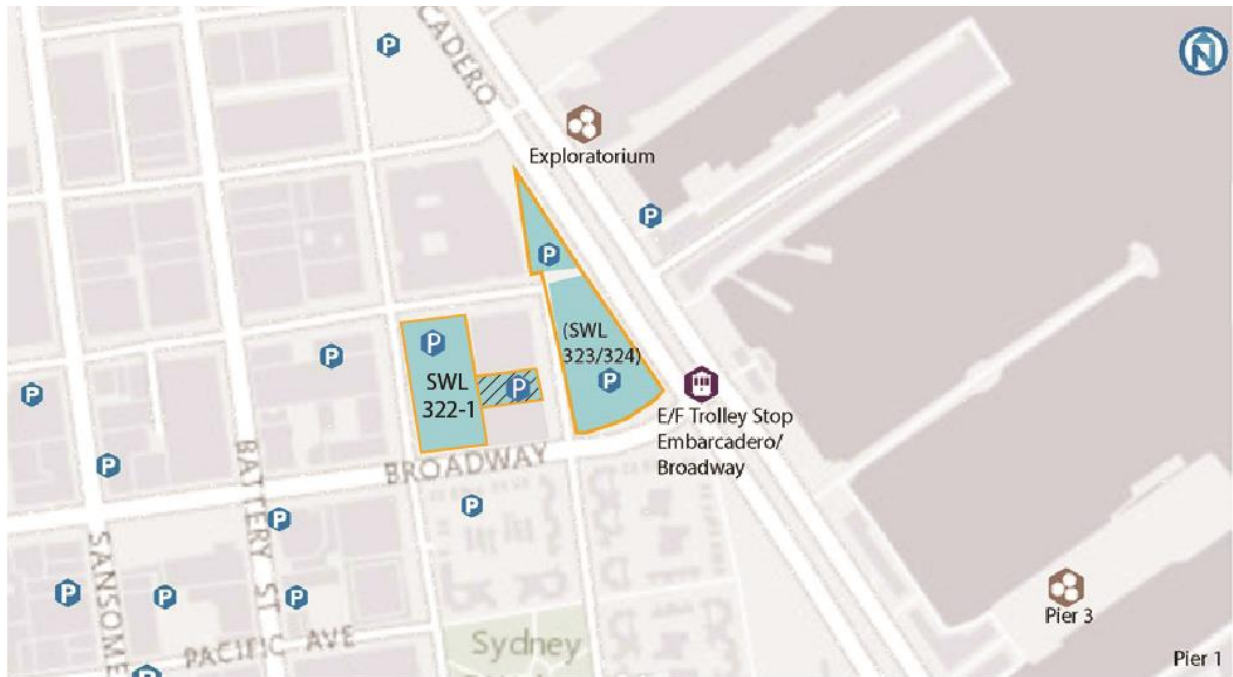
On April 26, 2016, by Resolution No. 16-18², the Port Commission approved a Term Sheet between the Port and TZK Broadway, LLC for the lease and development of a 180-200 room hotel, a dinner-theater, a 7,400-square-foot open space and ancillary uses at Seawall Lots 323/324 and portions of unimproved Vallejo and Davis Street right-of-ways. Given the proposed development of the SWLs 322-1 and 323/324 and the infeasibility of including any replacement parking at SWL 322-1, the Port Commission directed staff to study parking trend around Seawall Lots 322-1, 323, 324 and 321 to address parking and transportation options given the expected loss of the current parking spaces on three of these lots.

A SUMMARY OF THE STUDY

A consultant team consisting of Seifel Consulting and Nelson\Nygaard was retained by Port staff to conduct the study around these particular lots as an element of a broader study of Port Waterfront parking and transportation demand management in support of the ongoing efforts to update the WLUP. The area studied covers about two to three city blocks to the north, west and south of the lots, an approximately five-minute walking distance to and from this area. An Area Map showing the lots is provided below.

²<http://sfport.com/sites/default/files/Commission/Documents/Commission%20Meeting%20Staff%20Reports/2016%20Commission%20Meeting%20Items/APR26/Item%2012A%20SWL%20324%20Action%20Memo%20for%20042616%20PC%20Meeting.pdf>

Map of the Area Studied



Parking Capacity in the Area

Off-street and on-street: The study reviews the current utilization of the lots and concludes that the predominant users of Lot 322-1 are commuters (employees of nearby businesses) and that the predominant users of Lot 323/324 are daily parkers, and visitors (patrons of nearby businesses and Waterfront attractions). The usage patterns for the City lot are assumed to be similar to those at Lot 322-1. The lots tend to achieve the highest occupancy between 11 a.m. and 2 p.m. SWL 323/324 has a higher occupancy on the weekends, which supports that the user base is likely attending cultural, entertainment, retail, and dining options in the area. Parking is more desired in the summer season when tourism is the most active.

A Map of Parking Facilities within a 5-minute Walking Distance in the Area



According to the consultant team, the three lots to be developed soon, SWLs 322-1, 323/324 and the City lot, have a combined capacity for 401 parking spaces and with valet operation, this capacity can be increased to 451. Nearby parking on Port property includes SWL 321, which provides 195 spaces and Pier 19 ½, which provides 115 spaces for a total of 310 parking spaces that can be increased to 410 parking spaces through valet and stacking operations. SWLs 322-1, 323/324 and 321, City lot and Pier 19½ have a combined parking capacity of 711 cars to 861 cars. There is additional capacity for 678 parking spaces in the area: 571 off-street spaces from 11 separate parking facilities and 107 on-street spaces, all within a five-minute walking distance. Around 1,389 parking spaces are currently available in the area and about 988 spaces would be available after SWLs 322-1 and 323/324 lots are developed. On the next page is a table showing these parking capacities.

A Table Showing Parking Capacity at SWLs 322-1, 323/324 and 321, City Lot and Pier 19 ½

Lot #	Number of Parking Spaces	Additional Parking Capacity if Valet operation if feasible	Total Potential Capacity
SWL 322-1	150	50	200
SWL 323/324	201	0	201
City lot	50	0	50
SWL 321	195	50	245

Pier 19 ½	<u>115</u>	<u>50</u>	<u>165</u>
Total	661	150	861

Parking Rates and Charges: Off-street parking costs in the area vary among the parking facilities, ranging from \$15 to \$22 per day and from \$280 to \$400 per month. These rates are reported to be slightly lower than those for South of Market and the nearby Financial District.

Significant Investment to increase Parking Capacity is not warranted: Because of new and projected transportation options, parking revenues in the area generally are expected to remain stable or to potentially decline over time. The implication of this trend is that investment in any significant, new parking supply may be risky and that existing facilities capacity could be increased, if warranted through lower-cost management and operational techniques such as the use of valet, stacking, and unifying parking operations under one management when feasible.

Transportation Options after the Lots are Developed

Multiple Choices in Local and Regional Transit Offerings: A broad range of transportation options requiring no parking is available for access to, and from, the area according to the study. The options include the local and regional transit networks, car-sharing, expanding bicycle network, and other personal transportation devices. Because the area is located close to the Financial District, it is served well by the local and regional transit services. A map showing the transit services in the area and its vicinity is provided on the next page.

Local Transit: Muni uses buses and streetcars to serve the area. The Embarcadero, which is the eastern boundary of the area, has the E- Embarcadero and F Market & Wharves historic streetcar lines that connect to major local transit corridors and hubs, including Market Street (for Muni Metro and surface trunk lines connecting to the rest of the city) and Caltrain’s Fourth & King Station. These lines travel through the area along The Embarcadero to Fisherman’s Wharf. The E-Embarcadero continues south past Market Street to China Basin and the F-Market & Wharves continues down Market Street through the Financial District, Union Square, Mid-Market/Civic Center, and Upper Market to The Castro. There are also bus routes (the Townsend, Folsom-Pacific, Marina Express and Levi Plaza Express) connecting the area to other areas of the City. Routes, the number of trains per hour, and frequency of service are summarized in the table on the next page.

A Map of Transit Systems serving the Area



San Francisco Muni Lines and the Number of Trains per hour

	Early Morning: 7 AM	Morning: 10 AM	Afternoon: 12 PM	Evening: 5 PM	Average Headway
Weekday					
E-Embarcadero	N/A	3	3	4	20 mins.
F-Line	7	7	9	8	7 mins.
Total Trains	7	10	12	12	
Saturday					
E-Embarcadero	N/A	3	3	3	20 mins.
F-Line	7	7	9	9	7 mins.
Total Trains	7	10	12	12	

Source: <https://511.org/transit/schedules-agency-info/agency/363/schedules>

Regional Transit: Regional transit options bridge the gaps for those traveling to or from the area to the greater Bay Area. A variety of regional transit providers have connection points accessible through the local transit network or are within walking or biking distance of the area. These providers include:

- For the East Bay, the San Francisco Bay Area Rapid Transit District (BART) by trains, Water Emergency Transportation Authority (WETA) by ferries and the Alameda–Contra Costa Transit District (AC Transit), the Western Contra Costa Transit Authority (WestCAT) and Solano County Transit (SolTrans), all three by buses.
- For the South Bay/Peninsula, BART and Caltrain, by trains and the San Mateo County Transit District (SamTrans) by buses.
- For the North Bay, the Golden Gate Bridge, Highway & Transportation District – Golden Gate Transit by dedicated bus routes and ferry services and WETA and Blue & Gold Fleet, by ferries.

Bicycle Infrastructure: Bicycle routes run through, and near, the area connecting to the north and south of the Port's Waterfront and other parts of the City through the Blue Greenway and San Francisco Bay Trail. There is a bike-share station with 15 docks at The Embarcadero and Vallejo Street. Class I and Class II bike parking spaces are included in the proposed development for the lots. Plans are underway to create a protected bicycle route along the Embarcadero that will separate bicyclists from motorists. The proposed expansion/addition of bike-share system, or Ford GoBike, including bike stations or will make this transit option more viable.

Private Transportation – Shared Mobility: According to the study, Transportation Network Companies (TNCs), like Uber, Lyft, Chariot, Chestnut Bullet, etc., are reported to have made it easier to not own a car, and thus, not need for a parking space. This transit options provide one-way trip fare, that on average, are between the cost of public transportation, \$2.25, and the cost of a traditional taxi, as shown on the table on the next page.

Uber and Lyft, transportation networks which connect riders and drivers real-time through app-enabled systems, both offer pooled services in which individuals with origins and destinations along the same route can share a ride for a lower fare.

Chariot, a privately-operated commuter shuttle company, offers crowd-sourced routes across San Francisco during commute periods. Unlike shuttles used by many private employers in the region, Chariot serves individual users by charging for individual seats. The cost of Chariot shuttle service varies based on the time of pick-up. Rides during the peak periods (7:00 a.m. to 9:15 a.m. and 4:30 p.m. to 6:15 p.m.), cost upwards of \$5 per ride. Rides at other times are about \$3. An all-access monthly pass is \$119, according to the study. The Chestnut Bullet and the Union Cruiser are Chariot routes that provide service to the waterfront.

Reported one-way fares for some of the transit systems are provided on the table on the next page.

Reported Fares for One-Way TNC Trip, Rounded to Nearest Dollar

Origin and Destination	Component	Lyft	Lyft Line	UberX	Uber Pool ³	Taxi	MUNI
Embarcadero BART to Exploratorium	Price	\$7-8	\$4	\$6-9	\$7-9	\$8.68	\$2.25
	Time (min)	3 - 12	5 - 15 ⁴	3 - 12	5 - 15 ⁴	3 - 12	9+ ⁵
4 th /King Caltrain to Exploratorium	Price	\$7-12	\$4	\$8-10	\$7-8	\$17.21	\$2.25
	Time	8 - 22	10 - 30 ⁴	8 - 22	10 - 30 ⁴	8 - 22	20+ ⁶

Consultant Team Reported Sources: Uber and Lyft prices estimated through the apps. Taxi price estimated taxifarefinder.com. Travel times estimated using Google Maps, for a 5 p.m. weekday departure time.

Car Share Programs: The study indicates that there are several companies offering car share services covering the area. Car share can provide residents and employees who do not own a car or do not bring one to the area, flexibility for trips for which transit is not as practical (i.e. errands, indirect or off-peak transit trips, etc.). The companies provide on-demand vehicles to members on an hourly and/or daily rate. Rates vary based on the make of the vehicle and length of use, ranging from \$7 to \$15 per hour.

Autonomous Vehicles: The study indicates that numerous automobile manufacturers and technology companies are making substantial investments to develop autonomous vehicle (AV) technology – driver-less vehicles - for the near future. Widespread adoption is anticipated between 2035 and 2060. If AVs are widely adopted, it could lead to significant declines in parking demand, as a smaller and more continuously-utilized automobile fleet would demand far fewer parking spaces. Price, context, safety, and regulations are all likely to influence the speed of adoption.

CONCLUSIONS AND RECOMMENDATIONS

Conclusion: The study concludes by indicating that sufficient parking spaces can be available in the area to serve residents, visitors, business patrons and employees after the lots are developed. With projected trends indicating increasing use of transit and alternative transportation options, parking demand is not expected to outstrip supply in the area, particularly as parking capacity could be increased at existing Port lots through valet or mechanical and automated parking systems.

Recommendations: Given the current estimate of 12 to 18 months before removal of any parking spaces from the lots to start construction, the study recommends using this time interval to manage the transition by: (a) informing existing lot users through early and regular communication about other parking locations in the area and providing parking wayfinding; (b) promoting transit and mobility choices to encourage biking,

³ Note: Price range estimated through the app, which reported a higher price range for Uber Pool than UberX for Embarcadero BART to the Exploratorium. The app also reported a higher Uber Pool price for the trip from Embarcadero BART to the Exploratorium than from Caltrain/4th and King to the Exploratorium.

⁴ Estimated, assuming slightly longer driver matching time and intermediate stops.

⁵ Excludes wait time. F-Market & Wharves runs every 7 minutes at peak.

⁶ Excludes wait time. E-Embarcadero runs every 15 minutes at peak.

walking, car-sharing, and the use of alternative modes of transportation (i.e. carpooling, transportation network company services, personal transportation devices, and micro transit like Chariot); (c) facilitating efficient management of existing parking assets through valet operations, stacking, and optimization apps, if warranted based on demand; (d) planning for the accommodation of multimodal and autonomous vehicles by encouraging the use of shared vehicles and pooled services; and (e) incentivizing the use of shared modes of travel of all kinds by proactively working with SFMTA to pilot curb management approaches.

After SWLs 322-1 and 323/324 and the City lot are redeveloped, the effects of the above recommendations and parking trends in the area should be evaluated to identify parking demand and the need for more or fewer parking resources in the area.

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