Oyster Point Hotel

Parking Study

Prepared for:
Ensemble
City of South San Francisco
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FEHR PEERS

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1. Introduction

This report presents a Parking Management Plan as required per the City of South San Francisco Zoning Code for a proposed hotel at 367 Marina Boulevard, herein referred to as the "Project." The City requires that hotels provide justification documenting expected demand based on project features as well as the project's approach to management and monitoring of parking. This study analyzes potential parking demand based and proposes several practices to manage supply and demand should any imbalances occur. Based on the analysis presented in this report, the Project's proposed parking supply is expected to adequately serve typical demand. Parking management strategies are presented to handle occasional surges in special event demand.

Project Description

The Project is located at 367 Marina Boulevard adjacent to the South San Francisco Ferry Terminal. The Project consists of approximately 350 hotel rooms, 10,300 square feet of dining space, and 14,300 square feet of meeting rooms. An 8,000 square foot ballroom may be added in a future phase. The Project would provide 232 parking spaces, of which 33 would be valet spaces. The Project includes three driveways along Marina Boulevard and a public access trail along the eastern edge of the site connecting to the Bay Trail. **Figure 1** depicts the proposed parking layout, while **Figure 2** illustrates the site plan program.

Figure 1: Parking Layout

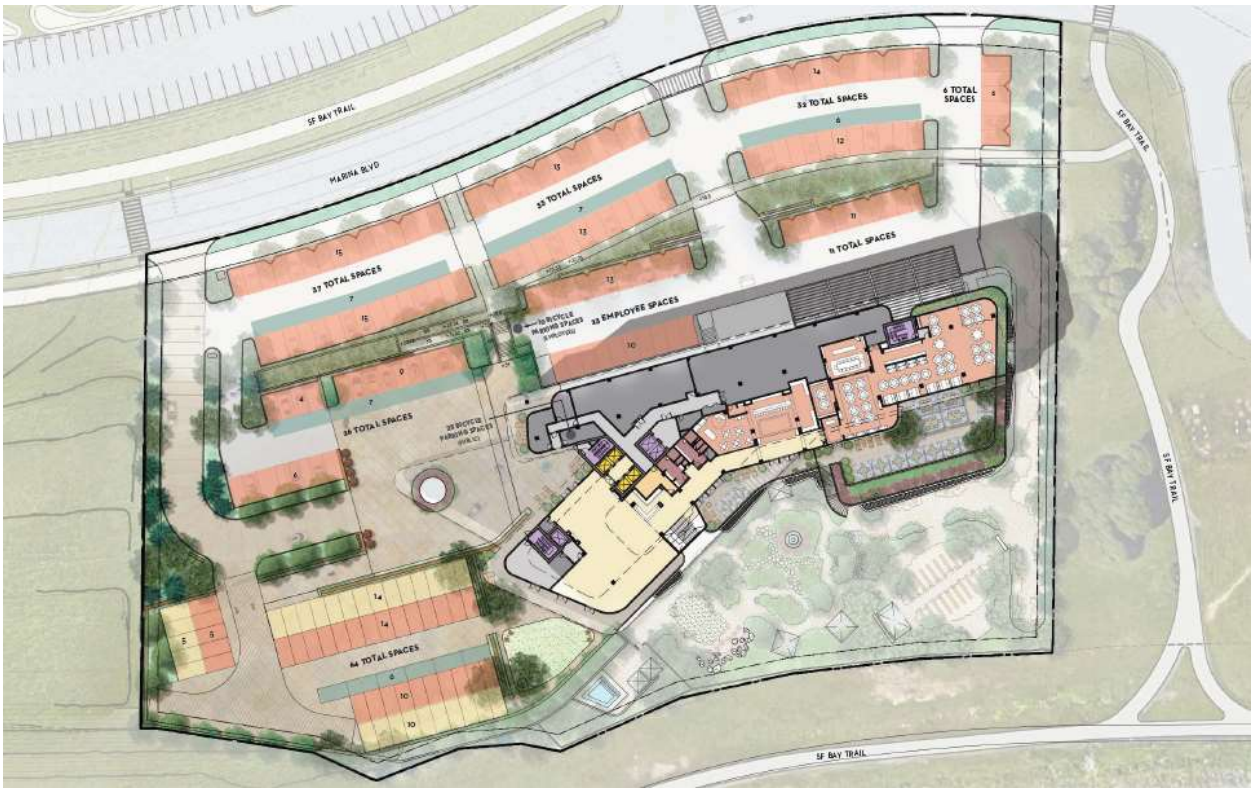


Figure 2: Site Plan Program

The Project's parking supply takes into consideration several factors that influence market demand. The hotel would primarily be oriented toward airport- and business-travelers who are more likely to rely on Uber and Lyft than rental cars. Additionally, the hotel is located within walking distance of a number of office/R&D campuses and is served by Commute.org shuttles, planned SamTrans service, and WETA ferry service. The availability of these services coupled with the Project's transportation demand management (TDM) program suggests lower parking demand than typical suburban hotel sites.

While occasional surges in parking demand may occur during special events, the applicant anticipates that this may be addressed through management strategies tailored to each event. A parking management plan is provided in the final section of this report.

2. Parking Demand Analysis

This report analyzes parking demand via two methods: the first method uses a shared parking method to analyze the Project's proposed uses based on national data, which the second reviews national and local data focused on peak demand. Combined, these methods offer insights into how the Project's parking demand may be affected by its mix of uses and location in South San Francisco.

Shared Parking Method

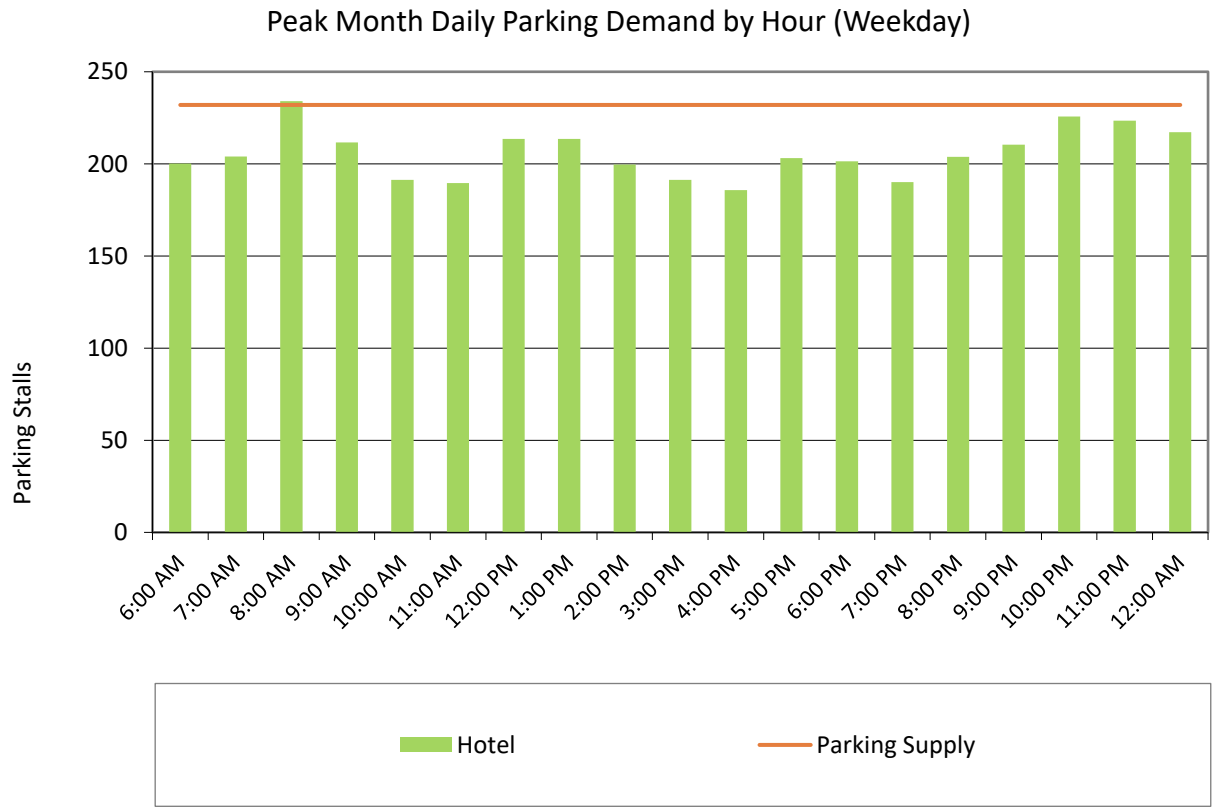
The ULI Shared Parking Manual provides estimates hotel parking demand based on the mix of uses specific to the Project. It estimates that hotel visitors generate a weekday demand of about 0.58 parking spaces per room, and hotel employees generate a demand of 0.15 parking spaces per room. Other features of the proposed Project can be reflected in the ULI calculations as well, including its restaurant and meeting room space.

The ULI Shared Parking Manual also calculates how parking demand varies by time of day. For employees, parking demand would be at its peak between 8 AM and 3 PM; for guests, parking demand would peak at 11 PM. At other times of day, parking demand for each group would be below its respective peaks.

The ULI Shared Parking method estimates the Project's typical peak parking demand to be 234 spaces, which would fluctuate by time of day and day of the week (**Figure 3**). These calculations are provided in **Appendix A**. ULI does not take into account a project's proximity to other land uses, use of transit or ride-hailing, or presence of a TDM program, so this estimate may be interpreted as slightly higher than what may be expected of the Project.

Based on the ULI method, the Project's proposed parking supply of 232 spaces appears roughly consistent with typical demand, although peak demand during the morning may reach 234 spaces. While the Project's location and likelihood of higher rates of walking, biking, transit, carpooling, and ride-hailing should help reduce demand, the ULI method suggests that demand may occasionally meet or exceed the Project's supply. If such periods occur, supply should be actively managed using practices noted in Section 3.

Figure 3. Estimated Peak Month Daily Parking Demand by Hour (Weekday)



Source: ULI Shared Parking Manual 2020; Fehr & Peers, 2022.

Peak Parking Demand Method

National and local data sources are also available to estimate peak parking demand. While these sources lack specificity on how a mix of uses affects hotel parking demand, they provide further insights on how hotel parking demand may vary – which is especially true of recent local data that reflects changing transportation conditions in the Bay Area.

ITE Data

Data from the ITE Parking Generation Manual (5th Edition) provides industry-accepted standards for estimating parking demand for different land uses based on nationwide research and data collection. The ITE Parking Generation Manual projects that standard hotels with meeting rooms and restaurant spaces would generate a typical peak parking demand of 0.74 spaces per hotel room, which translates to about 259 spaces for the proposed Project. The peak parking demand rate represents the maximum number of parking spaces used at a single point in time. However, there could be several (or many) hours throughout the day in which parking demand would be lower than the maximum rate.

ITE's data has several limitations: it lacks specificity in documenting the location, timeframe, and mix of uses in which its data was sampled, and many of its datapoints are from suburban locations out of state that predated Uber and Lyft, with different mixes of amenities present. For these reasons, ITE tends to be a less reliable source for estimating hotel parking demand, and is presented in this report for informational purposes.

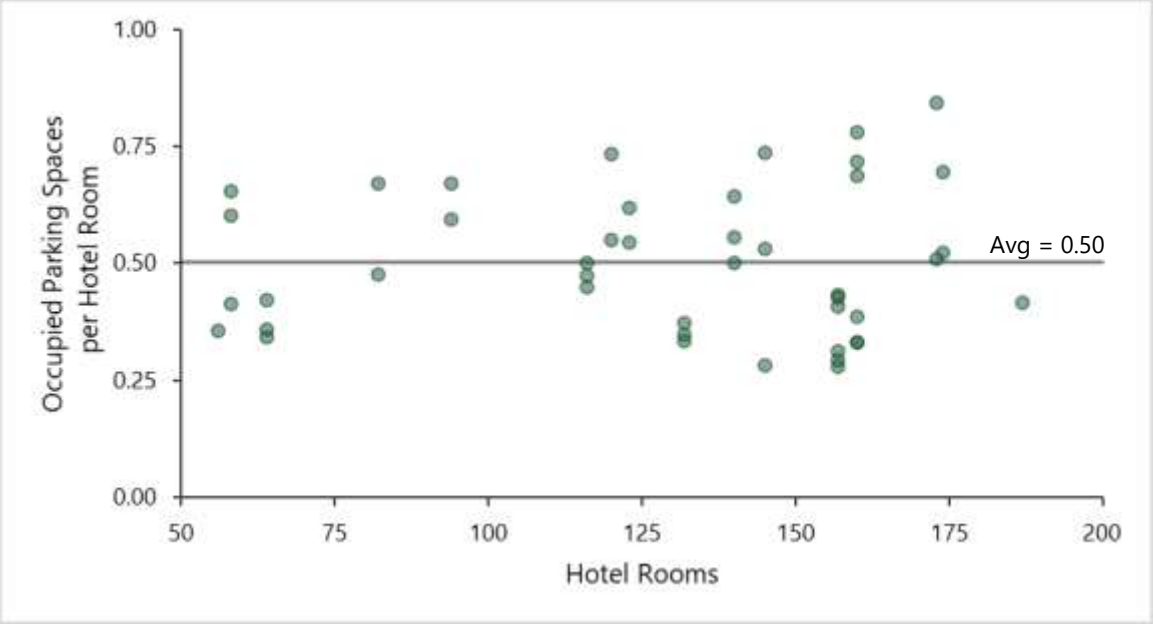
Local Data

Recent data collected in the Bay Area demonstrates how hotel parking demand is changing over time. Data was available from 47 days of observation across 19 different hotels. These studies were conducted between 2014 and 2019 in the cities of South San Francisco, Burlingame, San Mateo, Belmont, San Carlos, Redwood City, Palo Alto, Mountain View, Sunnyvale, and Cupertino. Hotels within the sample ranged in size from 56 to 187 guest rooms. See **Appendix B** for a complete list of hotels studied.

In each study, parking counts were conducted across multiple hours in the day. In some cases, parking counts were available for the full day of data collection; for others, only the peak observed parking count was reported. For each hotel, the peak observed parking demand and the number of hotel rooms were then used to calculate the peak parking demand rate. Like the ITE data, these local studies share the limitations of insufficient documentation of the mix of hotel uses, and are typically smaller in scale than the proposed Project.

On average, the peak observed parking demand rate was 0.50 spaces per hotel room. The highest observed peak demand rate was 0.84 spaces per hotel room, and the lowest was 0.28 spaces per room. **Figure 4** below displays the relationship between hotel size (by number of rooms) and peak parking demand rate - there was no correlation between hotel size and parking demand rate.

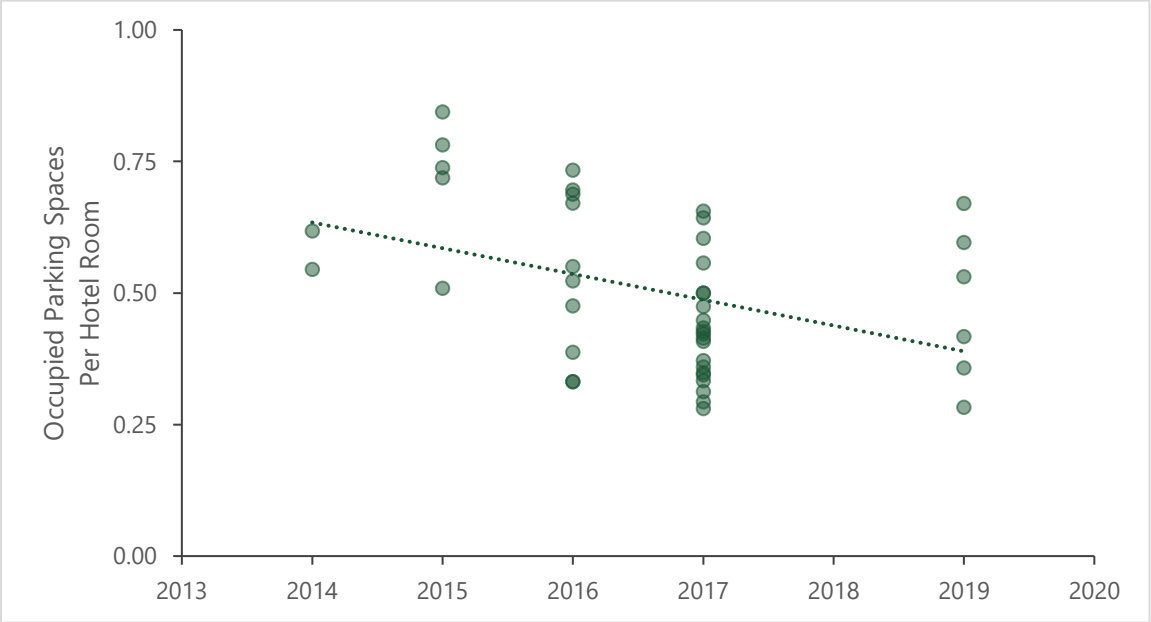
Figure 4. Peak Parking Demand Rate by Hotel Size



Of the 47 observations, 29 included information about how many hotel rooms were occupied during the period of data collection; 22 of those 29 hotels were more than 90 percent occupied. At hotels that were more than 90 percent occupied, the average peak parking demand was 0.52 spaces per hotel room (approximately equivalent to the average for all hotels in the sample). These results suggest that even when a hotel is fully occupied, a large proportion of guests do not travel by car or require a parking space.

The rise of ride-hailing over the past decade has changed how people travel when visiting hotels. **Figure 5** illustrates peak parking demand rates observed by year, illustrating an overall downtrend in hotel parking demand. Among the sites sampled, in 2015, the peak parking demand rate observed was 0.74 spaces per hotel room (similar to ITE's estimate); in 2019, the peak parking demand rate at that hotel was 0.40 spaces per room. While these results do not reflect a true before/after study of parking demand at the same sites, they suggest that hotel parking demand declined over time as travelers replaced rental cars with ride-hailing trips.

Figure 5. Peak Parking Demand Rate by Year



Based on the local data presented above, peak parking demand for the proposed Project is estimated to be roughly 140 to 182 spaces. To some extent, the proposed Project's proximity to transit and other land uses within walking distance may further reduce parking demand compared to some other sites surveyed. However, this range may be an underestimate as it may not fully take into account the effects of larger events that are more typical of a larger hotel compared to the smaller hotels sampled. For these reasons, the Project's 232 parking spaces appears adequate to meet demand, but there is some uncertainty in how this could vary with larger events.

3. Parking Management Practices

This parking demand analysis illustrates that the Project's parking supply of 232 spaces should generally be sufficient to accommodate demand under typical peak conditions. Local data suggests typical peak parking demand may be as low as 140 to 182 spaces, while the ULI Shared Parking model suggests parking demand may reach 234 spaces. There is uncertainty in both estimation methods associated with special events and the Project's unique location, which may result in larger fluctuations in demand and a lower overall auto mode share than national and local data points.

For these reasons, the Project should actively monitor parking conditions to prepare for typical surges in demand (occurring on a daily/weekly basis) and atypical surges demand (occurring due to large special events held at the hotel. When parking demand nears or exceeds supply, the hotel operator shall implement the following parking management practices:

- **TDM Program:** The hotel operator shall implement a TDM program as required by the City's ordinance and documented in the Project's TDM Checklist.
- **Event Planning:** Event sponsors shall work with the hotel operator to develop a parking management approach tailored to the scale and market of each event.
- **Valet Parking:** During typical daily/weekly peak periods and for special events, the hotel operator should expand valet parking areas or shift to an all-valet system while scaling up valet staffing as necessary. As a first step, employee parking should be fully valet at all times.
- **Offsite Parking:** For larger events, the hotel operator should establish partnerships with offsite parking facilities for valet and self-park use. Offsite parking is particularly useful for evening events and on days when adjacent lots are not full.
- **Shuttle Charters or Ride-Hailing Promotions:** If valet and offsite parking not able to fully accomodate larger events due to scheduling conflicts, the hotel operator should work with event sponsors to establish shuttle charters or ride-hailing credit promotions for event attendees. Shuttle charters may be more suitable to events oriented toward specific employers in the East of 101 Area, while ride-hailing credit promotions may be more suited toward events targeting a wider audience.
- **Trip Planning Assistance:** For all events, the hotel operator and event sponsor should provide trip planning assistance that prominently features wayfinding instructions for transit, active transportation, and ride-hailing access as well as instructions for valet or offsite parking. Non-auto modes of access should be promoted to reduce overall vehicle trips to the site, especially for events targeted to employers within the East of 101 Area.
- **Event Monitoring:** The hotel operator shall be responsible for monitoring parking demand for special events and adjust its management practices as needed.

By implementing these parking management practices, the hotel operator should be able to minimize instances of parking shortages associated with special events and other typical surges in demand.

Appendix

Appendix A. Sample of Previous Parking Studies - Parking Count Results by Hotel

Hotel	City	Date	Day of the Week	Rooms	Percent of Rooms Occupied	Parking Stalls	Stalls per Hotel Room	Peak Parking Demand per Room	Peak Parking Demand Per Occupied Room	Peak Parking Occupancy
AC Hotel	South San Francisco	4/17/2019	Wednesday	187	99%	100	0.53	0.42	0.42	78%
Hilton Garden Inn	Burlingame	5/16/2017	Tuesday	132	94%			0.35	0.37	
Hilton Garden Inn	Burlingame	5/17/2017	Wednesday	132	96%			0.33	0.35	
Hilton Garden Inn	Burlingame	5/18/2017	Thursday	132	79%			0.37	0.47	
Bay Landing	San Mateo	5/16/2017	Tuesday	157	99%			0.41	0.41	
Bay Landing	San Mateo	5/17/2017	Wednesday	157	98%			0.43	0.44	
Bay Landing	San Mateo	5/18/2017	Thursday	157	99%			0.43	0.43	
Hilton Garden Inn	San Mateo	5/16/2017	Tuesday	157	99%			0.29	0.29	
Hilton Garden Inn	San Mateo	5/17/2017	Wednesday	157	98%			0.28	0.29	
Hilton Garden Inn	San Mateo	5/18/2017	Thursday	157	99%			0.31	0.32	
Los Prados Hotel	San Mateo	3/7/2017	Tuesday	116	92%			0.47	0.51	
Los Prados Hotel	San Mateo	3/8/2017	Wednesday	116	95%			0.45	0.47	
Los Prados Hotel	San Mateo	3/9/2017	Thursday	116	91%			0.50	0.55	
Holiday Inn	Belmont	3/30/2016	Wednesday	82	79%	77	0.94	0.48	0.60	51%
Holiday Inn	Belmont	4/2/2016	Saturday	82	83%	77	0.94	0.67	0.81	71%
Fairfield Inn & Suites	San Carlos	4/7/2016	Thursday	120	68%	112	0.93	0.55	0.80	59%
Fairfield Inn & Suites	San Carlos	4/9/2016	Saturday	120	58%	112	0.93	0.73	1.28	79%
TownPlace Suites	Redwood City	11/6/2019	Wednesday	94	100%			0.67	0.67	
TownPlace Suites	Redwood City	11/17/2019	Sunday	94	97%			0.60	0.62	
Hilton Garden Inn	Palo Alto	5/24/2016	Tuesday	174	92%	178	1.02	0.52	0.57	51%
Hilton Garden Inn	Palo Alto	7/27/2016	Wednesday	174	100%	178	1.02	0.70	0.70	68%

Hotel	City	Date	Day of the Week	Rooms	Percent of Rooms Occupied	Parking Stalls	Stalls per Hotel Room	Peak Parking Demand per Room	Peak Parking Demand Per Occupied Room	Peak Parking Occupancy
Hilton Garden Inn	Mountain View	4/30/2015	Thursday	160	97%	153	0.96	0.72	0.74	75%
Hilton Garden Inn	Mountain View	5/2/2015	Saturday	160	98%	153	0.96	0.78	0.80	82%
Hilton Garden Inn	Mountain View	10/26/2016	Wednesday	160		153	0.96	0.69		72%
Hilton Garden Inn	Mountain View	10/28/2016	Friday	160		153	0.96	0.39		41%
Hilton Garden Inn	Mountain View	10/29/2016	Saturday	160		153	0.96	0.33		35%
Hilton Garden Inn	Mountain View	10/30/2016	Sunday	160		153	0.96	0.33		35%
Crestview Hotel	Mountain View	7/2/2017	Sunday	64				0.42		
Crestview Hotel	Mountain View	7/3/2017	Monday	64				0.36		
Crestview Hotel	Mountain View	7/5/2017	Wednesday	64				0.34		
Hotel Strata	Mountain View	7/2/2017	Sunday	58				0.66		
Hotel Strata	Mountain View	7/3/2017	Monday	58				0.60		
Hotel Strata	Mountain View	7/5/2017	Wednesday	58				0.41		
Residence Inn	Mountain View	7/2/2017	Sunday	140				0.64		
Residence Inn	Mountain View	7/3/2017	Monday	140				0.50		
Residence Inn	Mountain View	7/5/2017	Wednesday	140				0.56		
Hotel Vue	Mountain View	1/9/2019	Wednesday	56	86%	56	1.00	0.36	0.42	36%
Courtyard by Marriott	Sunnyvale	4/30/2015	Thursday	145	99%	127	0.88	0.74	0.74	84%
Sheraton Inn	Sunnyvale	4/30/2015	Thursday	173	72%	283	1.64	0.51	0.70	31%
Sheraton Inn	Sunnyvale	5/2/2015	Saturday	173	95%	283	1.64	0.84	0.89	52%
Courtyard by Marriott	Sunnyvale	3/26/2019	Tuesday	145		127	0.88	0.53		61%
Courtyard by Marriott	Sunnyvale	3/30/2019	Saturday	145		127	0.88	0.28		32%
Aloft Hotel	Cupertino	6/11/2014	Wednesday	123	100%			0.62	0.62	
Aloft Hotel	Cupertino	6/14/2014	Saturday	123	98%			0.54	0.55	

Source: Compiled by Fehr & Peers, 2020.

Appendix B. Urban Land Institute Shared Parking Analysis

Shared Parking Demand Summary											
Peak Month: APRIL											
Land Use	Project Data		Weekday					Weekday			
			Base Ratio	Driving Adj	Non-Captive Ratio	Project Ratio	Unit For Ratio	Peak Hr Adj	Peak Mo Adj	Estimated Parking Demand
	Quantity	Unit						8 AM	April	
Hotel and Residential										
Hotel-Business	350	keys	0.98	59%	100%	0.58	key	80%	100%	163
Hotel-Leisure		keys	1.00	50%	100%	0.50	key	90%	100%	-
Hotel Employees	350	keys	0.15	100%	100%	0.15	key	100%	100%	53
Restaurant/Lounge	10,300	sf GLA	6.67	63%	90%	3.78	ksf GLA	30%	92%	11
Meeting/Banquet (0 to 20 sq ft/key)		sf GLA	0.00	68%	60%	0.00	ksf GLA	30%	100%	-
Meeting/Banquet (20 to 50 sq ft/key)		sf GLA	0.00	68%	60%	0.00	ksf GLA	30%	100%	-
Meeting/Banquet (50 to 100 sq ft/key)		sf GLA	0.00	68%	60%	0.00	ksf GLA	30%	100%	-
Convention (100 to 200 sq ft/key)		sf GLA	0.00	68%	60%	0.00	ksf GLA	50%	55%	-
Convention (> 200 sq ft/key)		sf GLA	5.50	68%	60%	2.23	ksf GLA	50%	55%	-
Restaurant/Meeting Employees	10,300	sf GLA	1.20	100%	100%	1.20	ksf GLA	60%	100%	8
								Customer/Visitor		174
								Employee/Resident		60
								Reserved		-
								Total		234
								Shared Parking Reduction		51%