Introduction

Complementing the household survey, the study team surveyed property managers in early 2019 to obtain detailed information regarding overall parking supply, process of allocating parking among residents, cost of parking, and number of residential units. The intent was to cross-reference property information supplied by building managers with household survey responses to draw relationships between on-site parking supply and cost with vehicle ownership and travel patterns. The SFMTA was successful in obtaining information from 112 of the 118 buildings included in the survey, including all the properties in which all units were subsidized or below market rate.

Methodology

The initial list of buildings to survey was obtained using City Planning's GIS database of parcels within the proposed study area and sorted by type and size of building. Only residential buildings with 50 or more units were selected and many of the newer buildings had commercial uses on the bottom floor. The names and contact information for property managers were obtained through internet searches, including a search of the California business license directory and listing of California homeowners associations. The survey was conducted over the phone and, on average, took respondents five to ten minutes to answer. Obtaining property information for most of the properties required extensive follow-up via calls and in-person visits to buildings where property managers were unreachable or off-site. To ensure the accuracy of the data collected, property manager responses were cross-verified with existing San Francisco City Planning Department records.

Summary of Findings

Building Characteristics
The buildings ranged in age from 1 to 116 years old and their size ranged from 50 to 595 units, with the average size at 179 units. Ninety-eight buildings offered on-site parking. The amount of parking provided depended not only on the size of the building, but also its ownership structure and target market. Parking availability ranged from none to nearly 600 spaces. Buildings with unbundled parking charged an additional monthly fee that varied between $45 and $450, with an overall average of $285 per month.

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Table 1. Building Characteristics		
	Range	**Average**
Year built	1904-2018	1999
Units	50-595	179
Parking spaces	0-925	122
Average monthly rate	$45-$450	$285
SFMTA, 2019. Large Building Study, Survey of Property Managers		

Ownership Structure and Target Market

The 112 buildings are split evenly between those owned and managed by one entity (apartment) and those owned and managed by a Homeowners Association (condominium). Fifty-three buildings are condominiums and 59 are apartment buildings. Condominiums tended to have more on-site parking available to residents with an average of 1.1 space per unit, including one building with no parking, while apartments had, on average, .6 spaces per unit.

The availability of parking varies by the target market. Fifty-one buildings offer only market rate units, 31 buildings offer a mix of market rate and affordable units and 25 offer only affordable units to eligible low-income families. Market rate units offer more parking than units available only to low-income households. On average, 1 space per unit is available to market rate units while only 0.2 spaces per unit is available to residents of affordable units.

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Table 2. Parking Access by Ownership Structure and Target Market

	All				Condominiums				Apartments			
	Buildings	Units	Parking Spaces	Space/ Unit	Buildings	Units	Parking Spaces	Space/ Unit	Buildings	Units	Parking Spaces	Space/ Unit
Total	112	20,046	15,689	0.8	53	8,386	9,425	1.1	59	10,522	6,264	0.6
Market Rate	51	8,854	8,253	0.9	36	5,950	6,158	1.0	15	2,904	2,095	0.7
Mixed Income	31	6,535	5,127	0.8	11	2,115	2,400	1.1	20	4,420	2,727	0.6
Buildings with 100% Affordable Units	25	3,519	796	0.2	3	321	155	0.5	22	3,198	641	0.2
Unknown	5	1,138	1,513	1.3	3	588	712	1.2	2	550	801	1.5

SFMTA, 2019. Large Building Study, Survey of Property Managers; Note: The term, "subsidized" refers to buildings with 90% - 100% of units allocated to low-income households and "mixed-income" refers to buildings with a mix of subsidized and market rate units.

Bundled and Unbundled Parking

Ninety-eight buildings offer on-site parking; 52 offer parking included in the cost of the residential unit (bundled) and 46 charged extra for parking (unbundled). Fourteen buildings offer no parking to residents. Of these, only one is a condominium. In general, the availability of parking per residential unit does not vary significantly between buildings with bundled or unbundled parking, 0.9 space per unit versus 0.8 space per unit. However, there is a marked difference in parking access between residents of condominiums and residents of apartments. Condominiums with bundled parking offer one space per unit while apartments with bundled parking offer half that, 0.5 space per unit. Similarly, residents of condominiums with unbundled parking are offered, on average, 1.0 space per unit while residents of apartments with unbundled parking are offered 0.7 spaces per unit on average.

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Table 3. Bundled and Unbundled Parking by Ownership Structure

	All Buildings				Condos				Apartments			
	Buildings	Units	Parking Spaces	Space/ Unit	Buildings	Units	Parking Spaces	Space/ Unit	Buildings	Units	Parking Spaces	Space/ Unit
All	112	20,181	15,689	0.8	53	9,109	9,425	1.0	59	11,072	6,264	0.6
No Parking Available	14	1,513	0		1	233	0		13	1,280	0	
Parking Available	98	18,668	15,689	0.8	52	8,876	9,425	1.1	46	9,792	6,264	0.6
__Bundled Parking	52	7,887	7,348	0.9	39	6,288	6,545	1.0	13	1,599	803	0.5
__Unbundled Parking	46	10,781	8,341	0.8	13	2,588	2,880	1.1	33	8,193	5,461	0.7

SFMTA, 2019. Large Building Study, Survey of Property Managers

Parking Access in Residential Permit Parking Areas

Slightly less than a third (35) of all buildings are located within one of three Residential Permit Parking (RPP) Areas: U (SoMa); Y (South Beach) or EE (Dogpatch). Buildings located within an RPP Area offer the same access to parking as buildings not within an RPP Area. And there are no significant differences in access to parking between buildings with bundled parking and those with unbundled parking; buildings with unbundled parking offer 0.8 spaces per unit while buildings with bundled parking offer 0.9 spaces per unit.

Table 4. Parking Access in RPP Areas

	Total Buildings	RPP Areas				Non-RPP Areas			
		Buildings	Units	Spaces	Spaces/ Unit	Buildings	Units	Spaces	Spaces/ Unit
Total	112	35	6,058	4,693	0.8	77	13,988	10,996	0.8
Onsite Parking	98	33	5,903	4,693	0.8	65	12,765	10,996	0.9
__Bundled Parking	52	16	2,095	1,963	0.9	36	5,792	5,385	0.9
__Unbundled Parking	46	17	3,308	2,730	0.8	29	6,973	5,611	0.8

SFMTA, 2019. Large Building Study, Survey of Property Managers

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Allocation of Available Parking

Parking is allocated among building residents in different ways, depending on the ownership structure and target market. Residents of buildings with the cost of parking included in their price have, for the most part, assigned or deeded parking spaces. Of the 52 buildings with bundled parking, 41 have allocated all parking to residents and, in some cases, to non-residents. In buildings with unbundled parking, owners have the option of selling un-allocated parking spaces to non-residents, or in the case of condominiums, to non-members. This further reduces parking access to residents, especially those with more limited incomes. Of the 46 buildings with unbundled parking, only 17 allocated all their available parking to residents or others while 27 of the buildings had still not allocated all their parking at the time of the survey. Whether this is due to residents not owning vehicles or residents not willing to pay the extra monthly fee (up to $450/month) or pay for ownership rights to a space (between $50,000 and $100,000 or more) was not explored as part of the survey.

Table 5. Share of Available Parking Allocated to Residents		
	Bundled Parking	Unbundled Parking
All Buildings	52	46
All Parking Allocated	41	17
Not all Parking Allocated	8	27
Unknown	3	2
SFMTA, 2019. Large Building Study, Survey of Property Managers		

Parking Access by Target Market

The distinctions in parking access between buildings that offer bundled parking and those that offer unbundled parking are more significant when looking at how parking access varies by target income group. Buildings with bundled parking offered only to low-income households had 0.4 parking spaces per unit while buildings with only market rate units had, on average, 1.0 space per unit, more than twice the supply relative to affordable housing.

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Similarly, buildings with unbundled parking marketed only to low-income households have only 0.25 parking spaces per unit while those with a mix of market-rate and affordable units or only market-rate units have much more, 0.74 and 0.85 spaces per unit, respectively.

Table 6. Bundled and Unbundled Parking by Housing Market

	All	Affordable				Mixed Income				Market Rate			
		Buildings	Units	Spaces	Space/ Unit	Buildings	Units	Spaces	Space/ Unit	Buildings	Units	Spaces	Space/ Unit
All Buildings	112	25	3,519	796	0.2	31	6,535	5,127	0.8	51	8,854	8,253	0.9
Within RPP Areas	35	7	882	161	0.2	16	3,475	2,662	0.8	11	1,455	1,505	1.0
Onsite Parking Available	93	18	2,626	796	0.3	27	6,246	5,127	0.8	48	8,658	8,253	1.0
__Bundled Parking	50	10	1,333	475	0.4	7	1,185	1,371	1.2	33	5,027	5,155	1.0
__Unbundled Parking	43	8	1,293	321	0.2	20	5,061	3,756	0.7	15	3,631	3,098	0.9
Average Monthly Fee		$140				$300				$312			
Range		$45 - $400*				$200 - $400				$225 - $450			

SFMTA, 2019. Large Building Study, Survey of Property Managers. Note: Five buildings did not indicate their target market. The term, "subsidized" refers to buildings with 90% - 100% of units allocated to low-income households and "mixed-income" refers to buildings with a mix of subsidized and market rate units. * Removing the one $400 outlier in this market reduces the average monthly fee to $111.

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