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TO: Mayor Marshall and City Council Members

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SUBJECT: **Findings from the Downtown Parking Survey and Focus Groups: Visitors' Interest in Park-Once Parking**

INTRODUCTION

In the second half of 2003, the City—in conjunction with the Bellevue Downtown Association (BDA)—sponsored a research survey along with two focus groups to gauge downtown visitors' interest in the “park-once” parking strategy recommended in the draft Downtown Implementation Plan (DIP). “Park-once” parking allows downtown visitors to park their car and then visit multiple destinations within downtown without moving their car. In addition to providing parking options that can be more convenient, park-once parking also has the potential to help use the existing short-term parking supply more efficiently and reduce short automobile trips within downtown.

This Management Brief provides an overview of findings from the park-once survey research. This complements the Council discussion of on-street parking, a separate study session item on tonight's agenda. On-street parking is one form of short-term parking available to downtown visitors.

In summary, the park-once survey and focus group results both pointed to the following conclusions:

- There is some level of frustration with the existing parking situation in Downtown.
- Park-once is attractive to some visitors, but there is no “one size fits all” parking solution either for all visitors or for individual visitors on different visits. Many customers prefer the convenience of parking right at businesses.
- Visitor's expectations about parking are very much tied to perceptions of downtown overall as a place. Given where Downtown is in its evolution as a place, the most promising and helpful park-once strategies over the next few years would involve providing downtown visitors with greater flexibility to park-once in existing parking.
- If park-once implementation proceeds, it is important to focus on the details.

City staff are planning on continuing discussions with the BDA and other downtown stakeholders in future months on whether to move forward on near-term implementation of park-once (as part of overall DIP early implementation) at this time and to identify critical elements of a work program if park-once is to be implemented. We will provide Councilmembers with updates on any milestones as this process proceeds.

BACKGROUND

The Downtown CAC included several recommendations in the Downtown Implementation Plan (DIP) to improve parking, including implementation of a “park-once” strategy. The DIP states that “a ‘park-once’ strategy needs to be developed as an overlay for all parking considerations” downtown. The DIP views park-once as one of the factors that will improve “the street character of downtown Bellevue” and make it more convenient for people to get around downtown. The park-once recommendation in the DIP is consistent with

earlier recommendations coming out of the 1996 Downtown Parking Task Force and the 1997 Urban Land Institute Advisory Panel, both of which identified problems with short-term visitor parking and a lack of coordinated management strategies.

After some discussions with downtown stakeholders in 2002 on the park-once concept, City staff and the BDA agreed it would also be helpful to understand more about downtown visitors' perceptions of current parking options and level of interest in using park-once style parking. It was hoped that having more information from these potential consumers of park-once would help inform efforts that could be taken to advance this concept, including providing insights on how and when park-once might be implemented.

The current research consisted of a combination of an intercept survey and focus groups conducted by Northwest Research Group (NWRG), an independent market research firm with offices in Downtown Bellevue. A total of 400 intercept interviews were completed in August in three areas of Downtown Bellevue: 1) the Pedestrian Corridor/Galleria Area, 2) the Northwest Village Area, and 3) Old Bellevue. Interviews were conducted primarily with downtown visitors who had parked in short-term parking during the day of the interview. In addition, two focus groups were conducted in late September with 10 participants each. The first group consisted of "Frequent Visitors" (those who visited downtown Bellevue at least three times per month) and the second consisted of "Infrequent Visitors" (those who visited less often but still at least twice per year).

KEY FINDINGS

This management brief summarizes key findings from the research. More details can be found in the survey and focus group reports, which are available in the Council office.

- ***What do Downtown visitors' general parking behaviors and preferences suggest about the potential market for park-once parking?***

Multiple destinations during single visits to Downtown are common, suggesting a potential market for park-once parking. Just over three-quarters (78%) said that half or more of their trips to Downtown involved more than one destination. Seventy percent (70%) had two or more destinations on their current trip to downtown (with stops at multiple stores in Bellevue Square counted as one destination).

Respondents' past parking behavior suggests that while visitors are used to parking for free, most would be willing to obtain parking validation and at least some are willing to pay for parking, at least for some trips. While the vast majority (94%) of visitors who drive downtown commonly park for free, a large majority (78%) also commonly park in validated areas for some trips; and a substantial fraction (35%) commonly use paid, non-validated parking in Downtown Bellevue. Slightly less than half (47%) commonly use on-street parking.

Survey responses suggest that visitors want both convenience and flexibility, with focus groups further clarifying that convenience can mean different things to the same person in different circumstances. Eighty-three percent (83%) of respondents agreed that they prefer the convenience of parking right in front of their downtown destinations. At the same time, more than half (55%) of all respondents said they would rather walk between their downtown destinations than drive their car to each destination. A minority (28%) think paying a small fee for parking is worth the convenience of not having to drive between their downtown destinations.

- ***Do visitors perceive problems with parking in Downtown Bellevue? If so, are there problems that park-once parking would help address?***

There are some problems for many, but not all, visitors with the existing parking situation. This is suggested by survey results and also by some focus group participants' frustration with having to move their cars between destinations. In addition, many focus group and survey respondents admitted violating proprietary parking rules. Park-once options have potential to help alleviate these problems.

Survey respondents were somewhat divided on how easy it is to find parking that suits their needs in Downtown, 43% agreed that “It is easy to find available parking that suits my needs in Downtown Bellevue,” and 29% disagreed. Some in the “frequent visitors” focus group expressed profound aggravation with the need to continually move their car when visiting multiple locations. However, the “infrequent visitors” focus group expressed more satisfaction with the existing parking situation, with several participants citing the convenience of parking at Bellevue Square (in essence a self-contained park-once district already).

Downtown Bellevue visitors are already trying to “park-once” now, even where this is not allowed: 67% acknowledged that in the last six months they had parked in a parking lot designated for one store and walked to another store (46% of respondents had done so “sometimes or frequently” and 20% had done so “rarely”). Nearly all focus group participants acknowledged “cheating” in this way.

Interestingly, participants in both groups did not cite lack of parking as problem, except during the holidays.

- ***Would downtown visitors be likely to use “park-once” parking? What factors would impact use of this park-once parking?***

Survey participants were read a general statement about a hypothetical park-once area and asked to indicate how likely they would be to use it. A similar description was read to focus group participants. *Slightly more than half (52%) of survey respondents are likely (4 or 5 rating) to use the generally described park-once parking.* Just over a quarter (26%) are unlikely (rating of 1 or 2) and the others were neutral or didn’t offer an opinion. Ratings of 5 (“very likely”) were significantly more common than ratings of 1 (“not at all likely”).

Participants in the focus groups were generally supportive of the “park-once” concept. However, support was stronger in the Frequent Visitors group, which seemed to be tied to frequent visitors’ greater level of familiarity with destinations and parking options in downtown. In the survey, however, infrequent visitors were not less likely to say they would use park-once.¹

Survey respondents were also read a series of statements describing specific conditions and asked how likely they would be park-once parking in each of those conditions. *Responses indicate that several of these factors would strongly influence visitors’ likelihood to use park-once parking:*

- **Parking cost and availability of validation:** *The responses of both survey and focus group participants suggested that use of park-once parking would be quite sensitive to the cost of parking.* Almost half (46%) of survey respondents said they would be likely to use park-once parking if it cost \$1 per hour while slightly fewer (40%) said they would not be likely at this price. The percentage who said they would likely use park-once parking dropped to only seventeen percent (17%) if it cost 5 dollars for 2-3 hours, but increased greatly (to 82%) with the opportunity to park for free with validation. Focus group respondents said they are generally used to—and appreciative of—free parking in Downtown Bellevue. Frequent visitors were more accepting of paying, although most infrequent visitors also mentioned some small charge would be acceptable.
- **Walking distance:** 66% percent of survey respondents said that they would use “park-once” parking if it was a 5-minute walk to their usual destinations. However, the percentage likely to use park-once parking went down to 41% if it was a 10-minute walk.
- **Weather:** 33% percent of survey respondents said that they were likely to use park-once parking if it was raining.

¹ This is probably linked to the fact that those intercepted for the survey were more familiar with downtown destinations and parking situations given that were intercepted in places in downtown *outside* Bellevue Square while most infrequent-visitor focus group respondents were recruited on the phone.

- **Availability of bus/circulator system:** 37% of survey respondents said that they would be likely to use park-once parking if there was a free bus they could take to/from each destination. While the “free bus” item was not very popular among most survey respondents, several focus group participants brought up the idea of a free bus or “hop-on/hop-off” trolley.

Focus Group participants mentioned all of the above factors along with several other factors that could affect their use of park-once parking:

- **Pedestrian friendliness and street-level interest:** Several focus group participants said they would be more inclined to park *and walk* to their destination if there were many interesting places along the way (e.g., tree-lined sidewalks, cafes and interesting shops).
- **Type of parking facility:** Focus group participants had strong feelings on how parking facilities should be designed. They wanted it to be well-signed and easy to get in and out of. They were split on whether they preferred parking to be surface, above-ground structured, or below ground; although some had negative perceptions about below-ground structures. Neither group saw additional on-street parking as a solution, with several noting concerns about reducing streets’ capacity to carry traffic.
- **Specific circumstances:** Whether visitors were traveling with young children, how much they were carrying, whether or not they were in a hurry.
- ***What does the research suggest about the next steps for considering park-once options?***

Perceptions about parking are tied to perceptions of Downtown overall as a place. Survey respondents who think Downtown Bellevue is very pedestrian friendly are more interested in park-once parking. Focus group participants talked about the “spread out” nature of Downtown Bellevue and said they would be more inclined to walk instead of drive between destinations if there were more interesting places along the way. Some participants also noted the mixed or transitioning “suburban” to “urban” nature of Downtown Bellevue.

Findings from the research on downtown visitors’ perceptions suggest that, currently, lack of coordinated management, rather than constrained parking supply, is a problem in Downtown Bellevue. This suggests that the next steps should focus on looking at opportunities to use the existing supply more efficiently. Staff will continue discussions with the BDA and other downtown stakeholders in coming months on this issue.