TECHNICAL MEMORANDUM

Project: 2023 Center City Off-Street Parking Study

Subject: Supply and Occupancy Survey

Date: April 16, 2024

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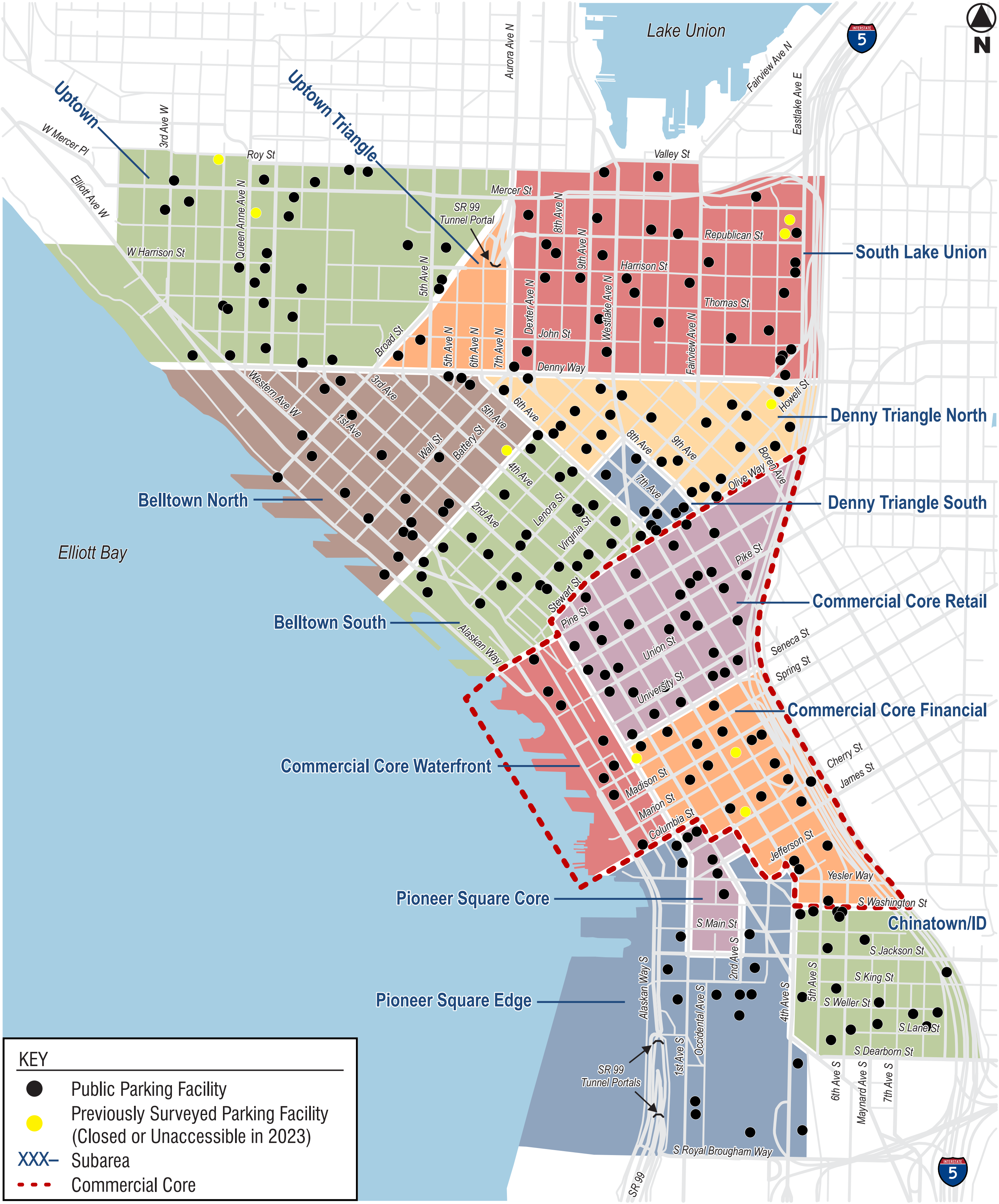
This memorandum summarizes the methodology and findings of the 2023 Center City Off-Street Parking Study performed for the Seattle Department of Transportation (SDOT). This survey of off-street facilities is the fifth study commissioned by SDOT with the previous four studies conducted in 2014, 2016, 2018, and 2021. This study analyzes public off-street parking facilities, which are available to the public during the workday between 8:30 A.M. and 6:00 P.M. Facilities reserved entirely for monthly parking, residents/ guests, customers/employees, or other permit holders were not considered public. The information for the off-street parking facilities together with Seattle's Annual On-Street Parking Study provide a comprehensive account of parking conditions and trends in the Center City. In addition, the 2023 survey included an analysis of event parking rate data collected in the Uptown study area.

1. Study Area

Figure 1 shows the study area for the 2023 Center City Off-Street Parking Study. The subareas are based on SDOT's on-street paid parking areas. The boundaries for the study area are generally Interstate 5 to the west, Roy Street to the north, S Royal Brougham Way to the south, and Elliott Bay to the west. To provide a consistent comparison to prior surveys, the subareas continue to be grouped by the "Commercial Core," which includes the financial district, retail core area, and waterfront (this boundary is shown in Figure 1), and "Outside the Commercial Core," comprised of all the other subareas.



2023 CENTER CITY
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Figure 1
Study Areas and Surveyed Facilities

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2. Survey Methodology

2.1. Parking Facilities Surveyed

Figure 1 shows the public facilities that were surveyed. The survey included facilities that are available for public parking Monday through Friday between the hours of 8:30 A.M. and 6:00 P.M. Facilities reserved entirely for monthly parking, residents/guests, customers/employees, or other permit holders were not considered public. During the 2023 study, 237 of 246 (96%) public parking facilities were surveyed; surveyors were denied access at 9 facilities.

Weekend data collection was performed for a sample of key facilities that had been selected for prior-year studies to represent a mix of small and large facilities as well as surface parking lots and garages. The same locations were surveyed for 2023 in order to assess trends over time; these sample facilities are shown on **Figure 2**.

2.2. Data Collection and Survey Periods

Parking occupancy counts were performed in October 2023 during the following times:

- Weekday (all facilities): Monday through Thursday, mornings between 8:45 A.M. and 12:00 P.M., and afternoons between 12:45 P.M. and 3:30 P.M.
- Weekend Evenings (sample facilities): Friday evening between 6:00 P.M. and 8:00 P.M.
- Weekends (sample facilities): Saturday afternoons between 11:30 A.M. and 2:30 P.M.

The data surveyors completed an inventory in each facility to confirm the number of parking spaces (parking supply), parking space restrictions (e.g., electric vehicle, disabled, or vanpool), as well as parking rates. Parking occupancy was recorded by type of space. Unlike past iterations of the study, only one weekday count was taken for each facility. Historical data suggests the difference between morning and afternoon occupancy counts was 1 to 2 percent points. Additional information was collected to show how parking varies by time of day and day of week (see Section 4).

2.3. Changes from Prior Studies

The 2014 study focused on surveying all publicly available facilities in the Commercial Core and a sample of facilities outside the Commercial Core. For the 2016, 2018, 2021 and 2023 studies, weekday surveys were performed at all facilities in all areas, with evening and weekend surveys performed at a sample of facilities in all areas. The 2018 survey added sample facilities in the South Lake Union and Capitol Hill South/Pike Pine area. The 2021 survey expanded the study area to include Little Saigon and Uptown, and excluded the Capitol Hill/Pike Pine area sampled in 2018. The 2023 studies only included facilities west of Interstate 5, which excludes Little Saigon, Capitol Hill and Pike Pine neighborhoods. A comparison of results for facilities surveyed since 2018 is provided in Section 5.

In 2023, the subareas used were adjusted and combined to be more in line with SDOTs paid parking areas. These changes included combining smaller subareas within Uptown and Southlake Union and splitting up the old Stadium subarea into the existing Pioneer Square Edge and Chinatown/ID subareas. The electric vehicle (EV) space type was split into two categories: "EV Charging Stations," and "Other Green Spaces," which are spaces reserved for EV/Alternative Fuel/Low Emission/Hybrid vehicles.

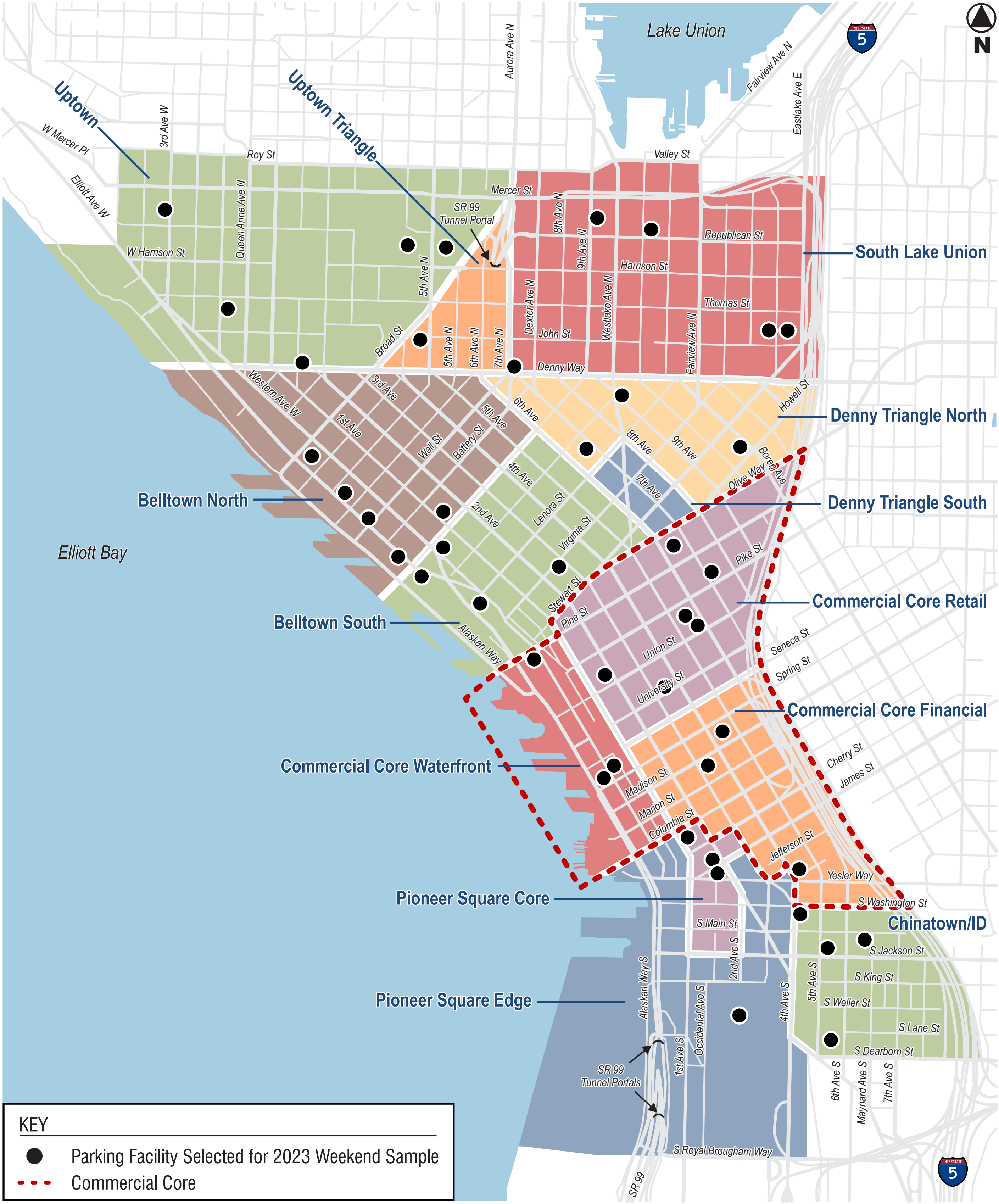

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Figure 2
Location of Off-Street Facilities Sampled on the Weekend

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3. Survey Results

The parking survey data were compiled to show various metrics for each of the thirteen subareas surveyed in 2023. The following tables summarize the results:

Table 1. Off-Street Parking Supply by Subarea – This table summarizes the number of facilities and number of parking spaces for each subarea. The “inventoried” category includes data from public parking facilities surveyed in 2023. The “total” category expands on the “inventory” category to include sampled data from the most recent study year for public facilities that were unable to be surveyed in 2023.

Table 2. Off-Street Parking Occupancy Survey Results: Weekday – This table summarizes parking occupancy for each subarea during the weekday periods. Parking occupancy is defined as the number of parked vehicles. Percent Occupancy is defined as occupancy divided by the total number of parking spaces.

Table 3. Off-Street Parking Occupancy Survey Results: Weekend – This table summarizes parking occupancy for the weekend periods for the sample facilities identified on **Figure 2**. As previously noted, these sample facilities are the same as those surveyed for prior-year studies.

Table 4. Average Rates for Off-Street Parking – This table summarizes the average posted parking rates for each subarea for various lengths of stay. Posted rates do not apply to customers who may have a monthly parking pass. It should be noted that in past studies, posted parking rates from each facility were averaged together, in 2023 this analysis was updated to weight the parking rates by the number of spaces subject to each posted rate. This analysis method provides a more granular approach presenting data at the parking space level rather than at a facility level and represents a rate that the average parking is most likely to pay. As such, the values presented may differ slightly from those presented in past reports. **Figure 3** shows the weighted average 2-hour parking rates by subarea, and **Figure 4** compares on-street and off-street 2-hour parking rates by subarea.

Table 5. Parking by Type of Space – This table summarizes the various types of spaces that were designated in the surveyed garages.

Table 6. Occupancy by Type of Space – This table summarizes parking occupancy by type of space.

Table 1. Parking Supply by Center City Subarea

Commercial Core Areas	Number of Public Off-Street Parking Facilities [a] Total [b]	Inventoried [c]	% Inventoried	Number of Public Off-Street Parking Spaces [a] Total [b]	Inventoried [c]	% Inventoried	Number of Paid On-Street Parking Spaces [d]
Financial	22	19	86%	8,222	7,453	91%	330
Retail	32	32	100%	12,522	12,522	100%	286
Waterfront	8	8	100%	2,003	2,003	100%	210
Total Commercial Core	*62*	*59*	*95%*	*22,747*	*21,978*	*97%*	*826*
Areas Outside Commercial Core							
Belltown North	22	21	95%	3,113	2,888	93%	1,207
Belltown South	27	27	100%	3,279	3,279	100%	715
Chinatown/ID	17	17	100%	1,500	1,500	100%	422
Denny Triangle North	25	24	96%	7,370	6,799	92%	381
Denny Triangle South	8	8	100%	2,154	2,154	100%	111
Pioneer Square Core	5	5	100%	1,014	1,014	100%	172
Pioneer Square Edge	16	16	100%	4,756	4,756	100%	432
South Lake Union	33	31	94%	7,092	6,939	98%	1,222
Uptown	29	27	*93%*	*5,154*	*5,100*	*99%*	*761*
Uptown Triangle	2	2	100%	581	581	100%	178
Total for Subareas Outside Commercial Core	*184*	*178*	*97%*	*36,013*	*35,010*	*97%*	*5,601*
Total All Areas	**246**	**237**	**96%**	**58,760**	**56,988**	**97%**	**6,427**

Source: Heffron Transportation, Inc., Surveys performed in October 2023.

a. *'Public Off-street parking facilities' includes facilities available for public parking during the workday between 8:30 A.M. and 6:00 P.M.*

b. *Reflects data from facilities that were able to be surveyed in 2023 and sampled data from the most recent study year available for the 9 facilities that were unable to be surveyed in 2023.*

c. *Reflects data from facilities that were able to be surveyed in 2023.*

d. *On-Street parking supply data was compiled from SDOT's blockface dataset (Downloaded April 2023)..*

Table 2. Off-Street Parking Occupancy Survey Results: Weekdays – October 2023

Commercial Core Areas	Number of Facilities Inventoried [a]	Inventoried Parking Spaces (Supply) [b]	Weekday Midday		
			Occupied Spaces	% Occupancy	Unoccupied Spaces [c]
Financial	19	7,453	4,398	59%	3055
Retail	32	12,522	6,977	56%	5,545
Waterfront	8	2,003	1,343	67%	660
Total Commercial Core	*59*	21,978	*12,718*	*58%*	*9,260*
Areas Outside Commercial Core					
Belltown North	21	2,888	910	32%	1,978
Belltown South	27	3,279	1,627	50%	1,652
Chinatown/ID	17	1,500	530	35%	970
Denny Triangle North	24	6,799	4,858	71%	1,941
Denny Triangle South	8	2,154	1,231	57%	923
Pioneer Square Core	5	1,014	588	58%	426
Pioneer Square Edge	16	4,756	1,414	30%	3,342
South Lake Union	31	6,939	4,364	63%	2,558
Uptown	27	5,100	1,162	23%	3,938
Uptown Triangle	2	581	213	37%	368
Total for Subareas Outside Commercial Core	*178*	35,010	*16,897*	*48%*	*18,113*
Total All Areas	**237**	**56,988**	**29,615**	**52%**	**27,373**

Source: Heffron Transportation, Inc., Surveys performed in October 2023.

a. *'Number of Facilities inventoried' includes off-street facilities available for public parking during the workday between 8:30 A.M. and 6:00 P.M. that were surveyed in 2023.*

b. *Indicates total parking supply for the surveyed facilities.*

c. *Unoccupied spaces represent the number of spaces where vehicles are not parked.*

Table 3. Off-Street Parking Occupancy Survey Results – Saturday – October 2023

		Saturday Midday			
Commercial Core	**Total Number of Facilities in Sample [a]**	**# of Spaces Surveyed [b]**	**Occupancy [c]**	**% Occupancy**	**Unoccupied Spaces [d]**
Financial	3	631	90	14%	541
Retail	6	4,174	1,111	27%	3,063
Waterfront	3	964	517	54%	447
Total Commercial Core	*12*	*5,769*	*1,718*	*30%*	*4,051*
Areas Outside Commercial Core					
Belltown North	5	1,699	420	25%	1,279
Belltown South	4	1,067	279	26%	788
Chinatown/ID	4	547	254	46%	293
Denny Triangle North	3	1,827	197	11%	1,630
Denny Triangle South	0	--	0	--	--
Pioneer Square Core	3	755	183	24%	572
Pioneer Square Edge	1	594	150	25%	444
South Lake Union	4	1,358	165	12%	1,193
Uptown	5	1,544	710	46%	834
Uptown Triangle	1	514	109	21%	405
Total for Subareas Outside Commercial Core	*30*	*9,905*	*2,467*	*25%*	*7,438*
Total All Areas	**42**	**15,674**	**4,185**	**27%**	**11,489**

Source: Heffron Transportation, Inc., Surveys performed in October 2023.

a. *The number of facilities that were selected for sampling in prior study years for the Saturday Midday Occupancy Surveys.*

b. *The number of spaces for the facilities included in the sample.*

c. *The number of vehicles parked in the facilities included in the sample.*

d. Unoccupied spaces represent the number of spaces where no vehicle is parked.

Table 4. Average Weekday Parking Rates – October 2023

Commercial Core Area	Average Off-Street Parking Rate by Space [b] 2-Hour	4-Hour	All Day (10-Hours)	All Day [d] (24-Hours)	Overnight	Off-Street Early Bird Program [c] # of Spaces with Early Bird Rate	% Offering Early Bird	Average Early-Bird Rate	On-Street Midday Paid Parking Rate (2-Hours) [d]
Financial	$17.86	$23.61	$32.08	$36.31	$40.00	3,888	52%	$18.40	$6.32
Retail	$13.80	$20.20	$29.60	$35.41	$37.58	9,598	77%	$16.49	$7.00
Waterfront	$16.74	$32.77	$36.69	$47.56	-- [e]	1,848	92%	$17.03	$8.78
Commercial Core Average	$15.44	$22.50	$31.09	$36.82	$34.98	15,334	70%	$17.18	$7.18
Areas Outside Commercial Core									
Belltown North	$9.05	$14.62	$20.15	$25.11	--	2,313	80%	$13.62	$5.18
Belltown South	$12.20	$17.67	$26.88	$32.76	$29.77	2,402	73%	$16.86	$9.02
Chinatown/ID	$11.85	$19.42	$24.74	$32.87	$5.00	676	45%	$17.21	$10.00
Denny Triangle North	$9.28	$14.72	$27.51	$32.92	$20.00	1,784	26%	$17.66	$10.00
Denny Triangle South	$9.68	$15.44	$26.04	$30.09	--	812	38%	$15.80	$9.73
Pioneer Square Core	$17.51	$31.98	$50.43	$47.89	--	829	82%	$19.08	$7.00
Pioneer Square Edge	$12.66	$15.94	$24.83	$39.41	--	1,677	35%	$16.46	$6.16
South Lake Union	$5.94	$11.47	$23.39	$26.96	$5.68	537	8%	$15.91	$8.90
Uptown	$12.66	$18.21	$19.19	$30.34	$12.50	1,977	39%	$11.30	$7.26
Uptown Triangle	$15.00	$23.22	$26.76	$30.00	--	67	12%	$15.00	$4.00
Subareas Outside Commercial Core Average	$10.29	$15.91	$24.90	$31.80	$9.83	13,074	37%	$15.68	$7.64
Overall Average	$12.27	$18.45	$27.08	$33.58	$33.09	28,408	50%	$16.35	$7.58

Source: Heffron Transportation, Inc., Surveys performed in October 2023.

a. *"Number of Spaces Inventoried" indicates spaces within facilities with posted rates.*

b. *Reflects the weighted average of all spaces in the subarea. Rates that did not include parking tax were increased by 25% to reflect Seattle's Parking Tax rate and sales tax.*

c. *Applies to customers who arrive before a set time in the morning and typically park all day.*

d. *On-Street parking rates derived for each study area using SDOT's blockface dataset (downloaded in April 2023) and SDOT's parking rates in effect prior to October 23, 2023. It reflects the cost to park for two hours in order to compare to off-street facility rates for the same duration.*

e. *Note. '--' indicates that there was no rate of that particular type for the referenced subarea.*

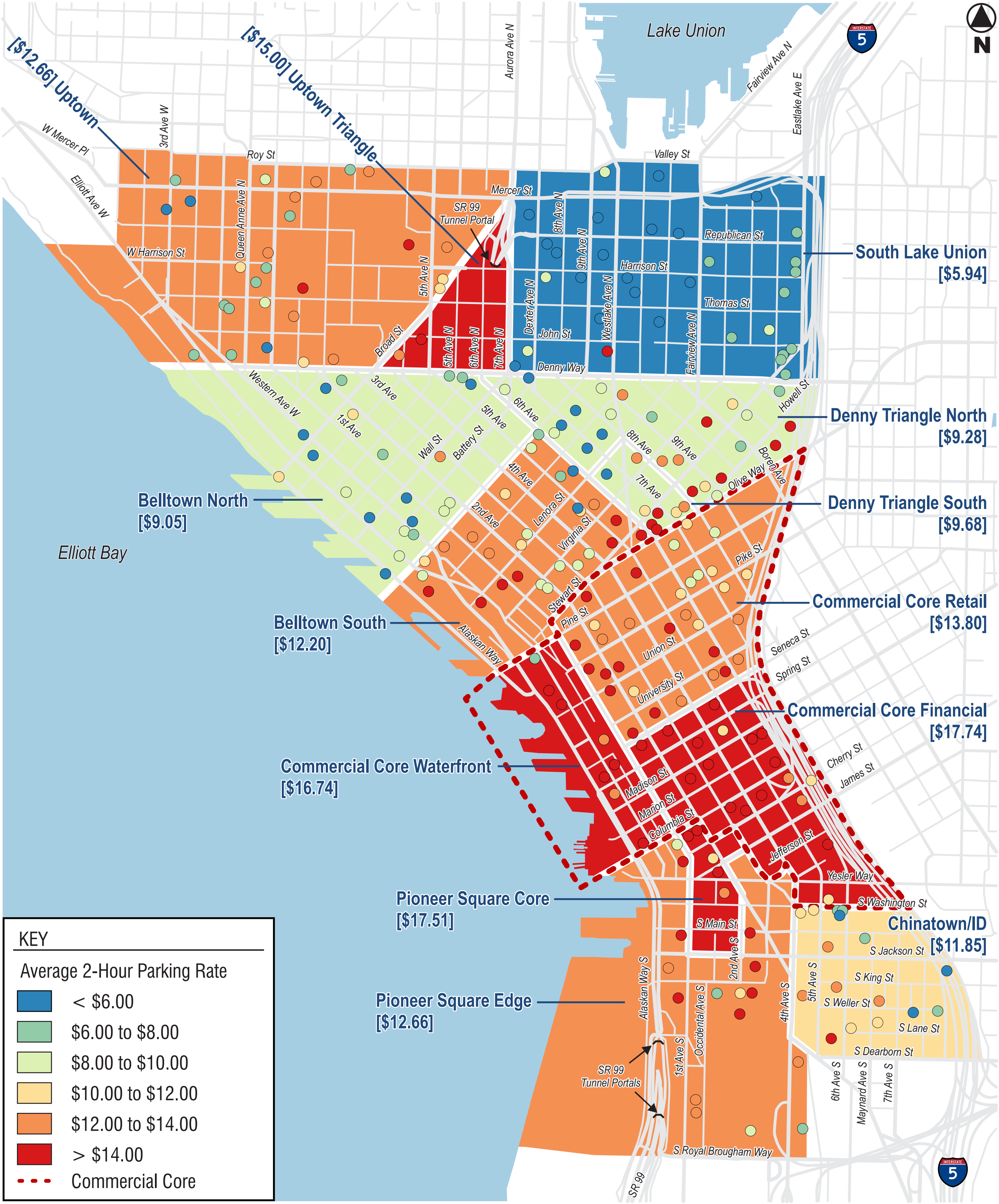

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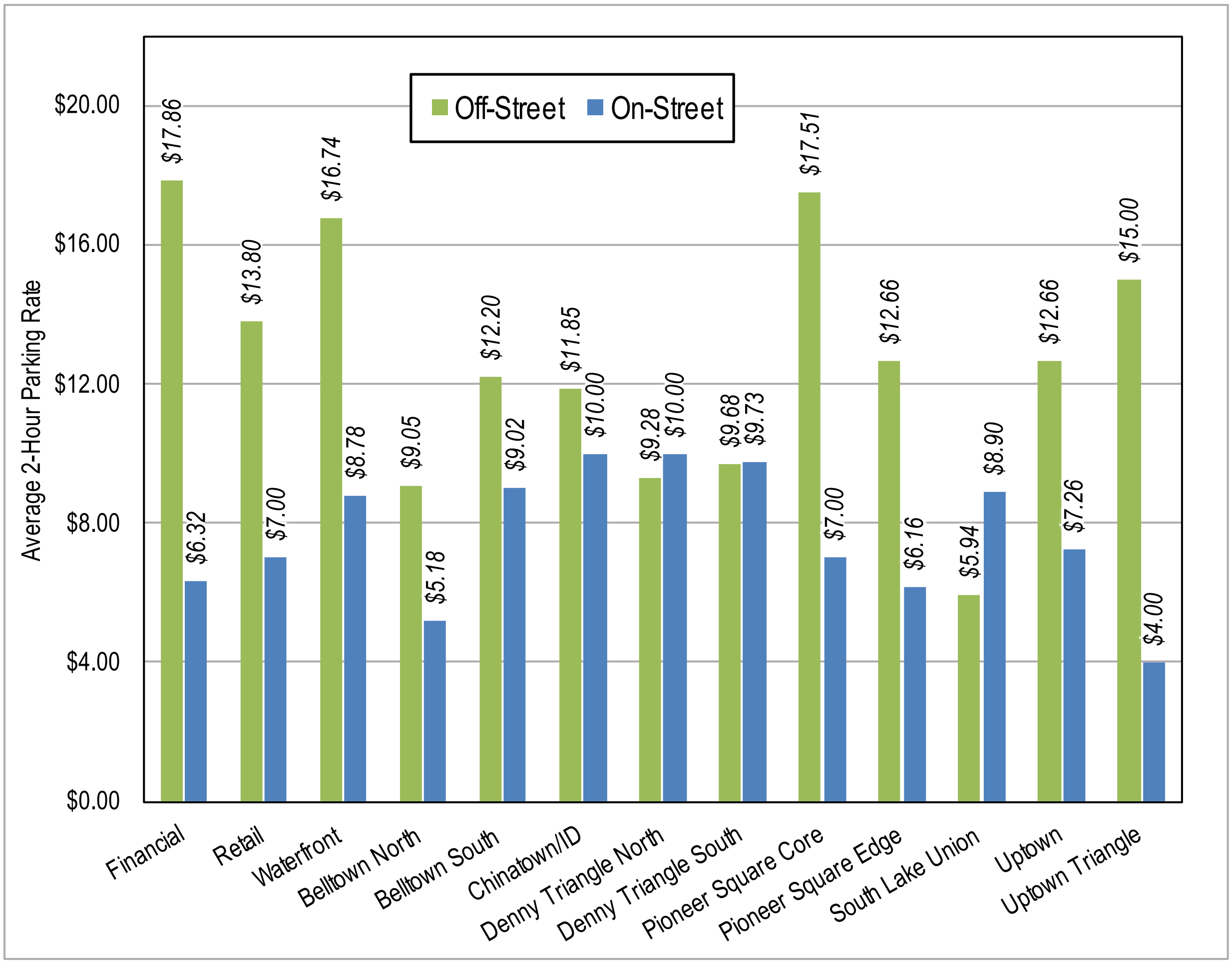
Figure 3
2- Hour Parking Rate by Subarea

Figure 4. 2-Hour Parking Rates – Off-Street versus On-Street



Source: Heffron Transportation, Inc., Surveys performed in October 2023.

Table 5. Parking Supply by Type of Space – October 2023

	All Space Types [a]		EV Charging Stations [b]		Other Green Spaces [b]		Disabled		Carpool		Vanpool		Load/ Unload		Carshare		Valet		Reserved	
Commercial Core	# of Facilities	Total Spaces	Spaces	% of Total	Spaces	% of Total	Spaces	% of Total	Spaces	% of Total	Spaces	% of Total	Spaces	% of Total	Spaces	% of Total	Spaces	% of Total	Spaces	% of Total
Financial	22	8,222	47	<1%	18	<1%	140	1.7%	49	<1%	5	<1%	8	<1%	5	<1%	0	--	923	11.2%
Retail	32	12,522	132	1.1%	5	<1%	287	2.3%	39	<1%	5	<1%	18	<1%	3	<1%	112	<1%	643	5.1%
Waterfront	8	2,003	19	<1%	0	--	47	2.3%	0	--	0	--	4	<1%	6	<1%	0	--	317	15.8%
Areas Outside Commercial Core																				
Belltown North	21	3,113	3	<1%	0	--	76	2.4%	27	<1%	2	<1%	1	<1%	5	<1%	0	--	558	17.9%
Belltown South	27	3,279	19	<1%	0	--	77	2.3%	35	1.1%	0	--	1	<1%	2	<1%	56	1.7%	97	3.0%
Chinatown/ID	17	1,500	7	<1%	0	--	41	2.7%	0	--	2	<1%	11	<1%	0	--	0	--	353	23.5%
Denny Triangle North	24	7,370	196	2.7%	90	1.2%	168	2.3%	62	<1%	72	<1%	5	<1%	0	--	0	--	284	3.9%
Denny Triangle South	8	2,154	34	1.6%	4	<1%	44	2.0%	12	<1%	27	1.3%	6	<1%	0	--	0	--	170	7.9%
Pioneer Square Core	5	1,014	6	<1%	0	--	34	3.4%	0	--	0	--	0	--	0	--	18	1.8%	111	10.9%
Pioneer Square Edge	16	4,756	51	1.1%	0	--	108	2.3%	0	--	0	--	0	--	6	<1%	39	<1%	93	2.0%
South Lake Union	31	7,092	152	2.1%	177	2.5%	154	2.2%	79	1.1%	152	2.1%	3	<1%	0	--	0	--	346	4.9%
Uptown	27	5,154	34	<1%	21	<1%	136	2.6%	22	<1%	5	<1%	8	<1%	0	--	0	--	160	3.1%
Uptown Triangle	2	581	8	1.4%	0	--	12	2.1%	3	<1%	0	--	0	--	0	--	0	--	134	23.1%
Total	**240**	**58,760**	**708**	**1.2%**	**315**	**<1%**	**1324**	**2.3%**	**328**	**<1%**	**270**	**<1%**	**65**	**<1%**	**27**	**<1%**	**225**	**<1%**	**4189**	**7.1%**

Source: Heffron Transportation, Inc., Surveys performed in October 2023.

a. *'Number of Facilities includes surveyed off-street facilities that provide public parking during the workday between 8:30 A.M. and 6:00 P.M.*

b. *In 2023 "EV Spaces" were split into two categories: "EV Charging Stations" and "Other Green Spaces," which includes EV, Alternative Fuel, or Hybrid/ Low Emission Vehicles.*

c. *'--' indicates that there was no available supply of that particular space type.*

d. *Note: Spaces not listed with a specific type of space are assumed to be general parking.*

Table 6. Midday Percent Occupancy by Type of Parking Space – October 2023

Commercial Core	All Space Types [a] # of Facilities	Total Spaces	EV Charging Stations	Other Green Spaces	Disabled	Carpool	Vanpool	Load/ Unload	Carshare	Valet	Reserved
Financial	22	8,222	68%	89%	38%	59%	20%	0%	20%	--	38%
Retail	32	12,522	61%	100%	24%	79%	100%	22%	100%	52%	33%
Waterfront	8	2,003	21%	--	40%	--	--	25%	83%	--	68%
Areas Outside Commercial Core											
Belltown North	22	3,113	33%	--	22%	33%	100%	100%	20%	--	17%
Belltown South	27	3,279	26%	--	36%	71%	--	0%	0%	32%	40%
Chinatown/ID	17	1,500	100%	--	20%	--	50%	27%	--	--	44%
Denny Triangle North	25	7,370	82%	98%	21%	73%	53%	60%	--	--	45%
Denny Triangle South	8	2,154	62%	100%	14%	75%	81%	17%	--	--	39%
Pioneer Square Core	5	1,014	50%	--	18%	--	--	--	--	44%	41%
Pioneer Square Edge	16	4,756	39%	--	16%	--	--	--	17%	0%	43%
South Lake Union	33	7,092	89%	93%	15%	48%	59%	33%	--	--	62%
Uptown	29	5,154	21%	0%	8%	5%	20%	38%	--	--	37%
Uptown Triangle	2	581	25%	--	8%	33%	--	--	--	--	37%
Total All Subareas	**246**	**58,760**	**68%**	**88%**	**22%**	**57%**	**59%**	**26%**	**41%**	**37%**	**40%**

Source: Heffron Transportation, Inc., Surveys performed in October 2023.

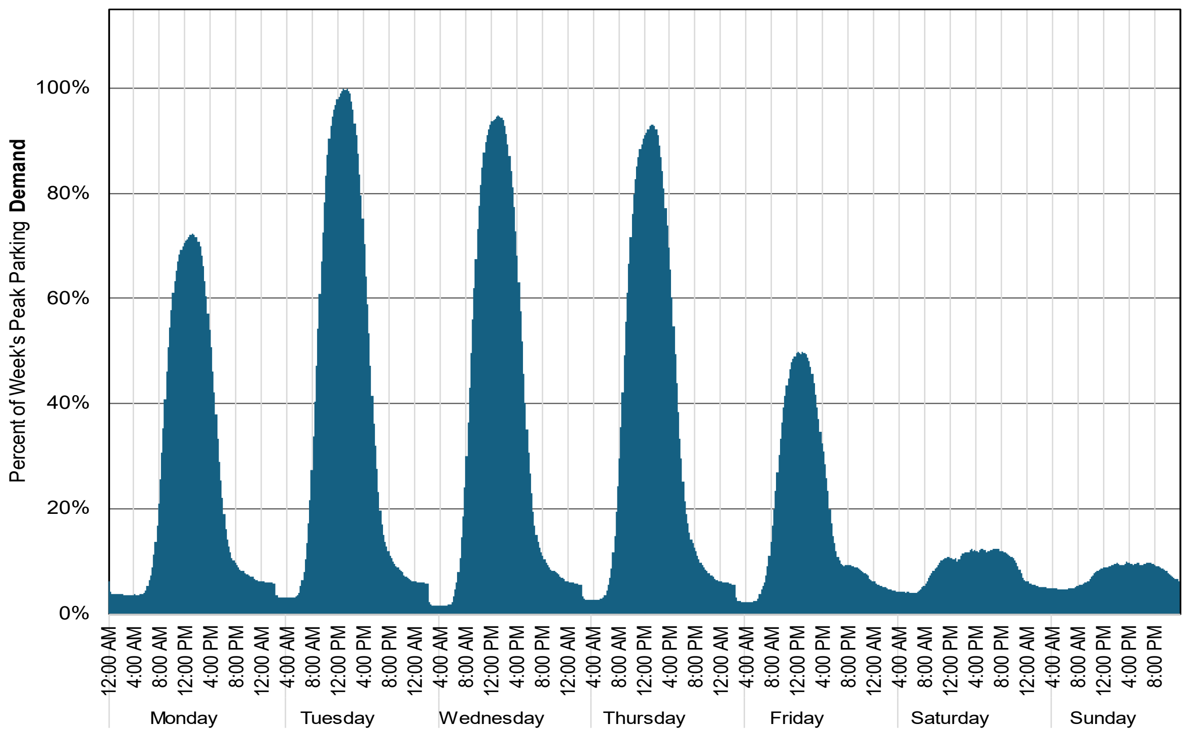
a. *'Number of Facilities' includes those* available for public parking during the workday between 8:30 A.M. and 6:00 P.M.

b. *'--' indicates that there was no available supply of that particular space type.*

4. Parking Accumulation by Time of Day and Day of Week

The 2023 study data reflects a post-COVID condition where many employees in the Center City are working a hybrid schedule with some days in the office and some days working from home. Employers offering hybrid work schedules likely affect parking use patterns in nearby parking facilities. To assess how this new working paradigm may affect parking utilization patterns, a parking accumulation pattern was derived using the 24-hr parking transaction data from 12 large garages during the 2-week period from October 15 through October 29, 2023. These garages are used by employees who have hybrid work schedules, as well as evening and weekend trips to area retail, restaurant, and entertainment uses. To protect confidential information, the data were compiled and then indexed to show the patterns as a percentage of the week's peak parking demand by hour of day. Figure 5 shows the demand accumulation pattern compared to the week's peak demand (values are shown as a percent of peak demand **not** 100% occupancy).

Figure 5. Weekly Parking Utilization Pattern – October 2023



Source: Heffron Transportation, Inc.

These data show that parking rates are highest on Tuesdays, Wednesdays, and Thursdays, with lower use on Mondays and Fridays. These also show that the garages are serving some evening and weekend use, but at a fraction of the midday employee demand.

The manual parking occupancy counts for the 2023 Center City Study were performed between 8:45 A.M. and 3:30 P.M. on Mondays through Thursdays. Only 7 % of all spaces used in the analysis were surveyed on a Monday; many facilities were resurveyed on other days of the week to reduce the potential effect of hybrid work.

5. Parking Trends Since 2018

Four prior off-street parking studies have been performed for the Center City: 2014, 2016, 2018, and 2021. The number of facilities surveyed during each iteration has shifted as new areas are surveyed, existing facilities close or become private, and new facilities emerge or private facilities change operation.

In past reports, trends were determined by comparing all data collected since 2014, however each year these comparisons become less accurate as the basis for comparable facilities reduce each year. Therefore, to provide a more robust comparison, the following section presents parking trends for facilities studied since 2018. These three study years also provide a good measure for the effects of the COVID-19 pandemic, with data for pre-pandemic conditions in 2018, re-opening conditions in 2021 (mask mandates had recently expired and companies began issuing back to work orders), and recovery conditions in 2023.

5.1. Change in Parking Supply

The total number of parking spaces that are publicly available in most of the subareas can be compared for the three study years. The results are summarized in **Table 7**.

Within the Commercial Core area, supply decreased 1% (138 spaces) between 2021 and 2023 due to some small facility closures. For areas outside the Commercial Core, parking supply decreased by 1% (289 spaces) from 2021 to 2023. While the overall loss of parking for all subareas was about 1%, there were some neighborhoods that gained parking and some neighborhoods with larger losses of parking. The largest increase in parking supply occurred in Uptown with the addition of 990 spaces (largely due to the completion of the climate pledge arena garage), at the same time parking decreased by 10% (518 spaces) in Pioneer Square Edge, 9% (707 spaces) in South Lake Union and 8% (48 spaces) in Uptown Triangle. These reductions were caused by garages shifting from public to private, and parking facilities being replaced by new construction.

It should be noted that additional data and field notes have been added to the 2023 historic parking database. This process included incorporating field notes, preforming quality control of facilities that were unable to be surveyed in prior years due to access issues and updating their status based on current year data (e.g., public, private, or no longer exists), and updating geolocation data to assist with future navigation. Due to these updates, the values presented for historic data in this report may be slightly different than in past reports.

Table 7. Change in Parking Supply – 2018 to 2023

Commercial Core Areas	Number of Publicly-Available Off-Street Parking Spaces [b] 2018 [a]	2021 [a]	2023[a]	% Change 2018 to 2021
Financial	8,758	8,293	8,222	-1%
Retail	12,893	12,550	12,522	0%
Waterfront	2,361	2,042	2,003	-2%
Total Commercial Core	24,012	22,885	22,747	-1%
Areas Outside Commercial Core				
Belltown North	3,568	3,110	3,113	0%
Belltown South	3,278	3,329	3,279	-2%
Chinatown/ID	1,638	1,442	1,500	4%
Denny Triangle North	4,835	7,377	7,370	0%
Denny Triangle South	2,626	2,162	2,154	0%
Pioneer Square Core	1,087	1,016	1,014	0%
Pioneer Square Edge	5,021	5,274	4,756	-10%
South Lake Union	7,475	7,799	7,092	-9%
Uptown Triangle	632	629	581	-8%
Uptown	2,859	4,164	5,154	24%
Total for Areas Outside Commercial Core	*33,019*	*36,302*	*36,013*	*-1%*

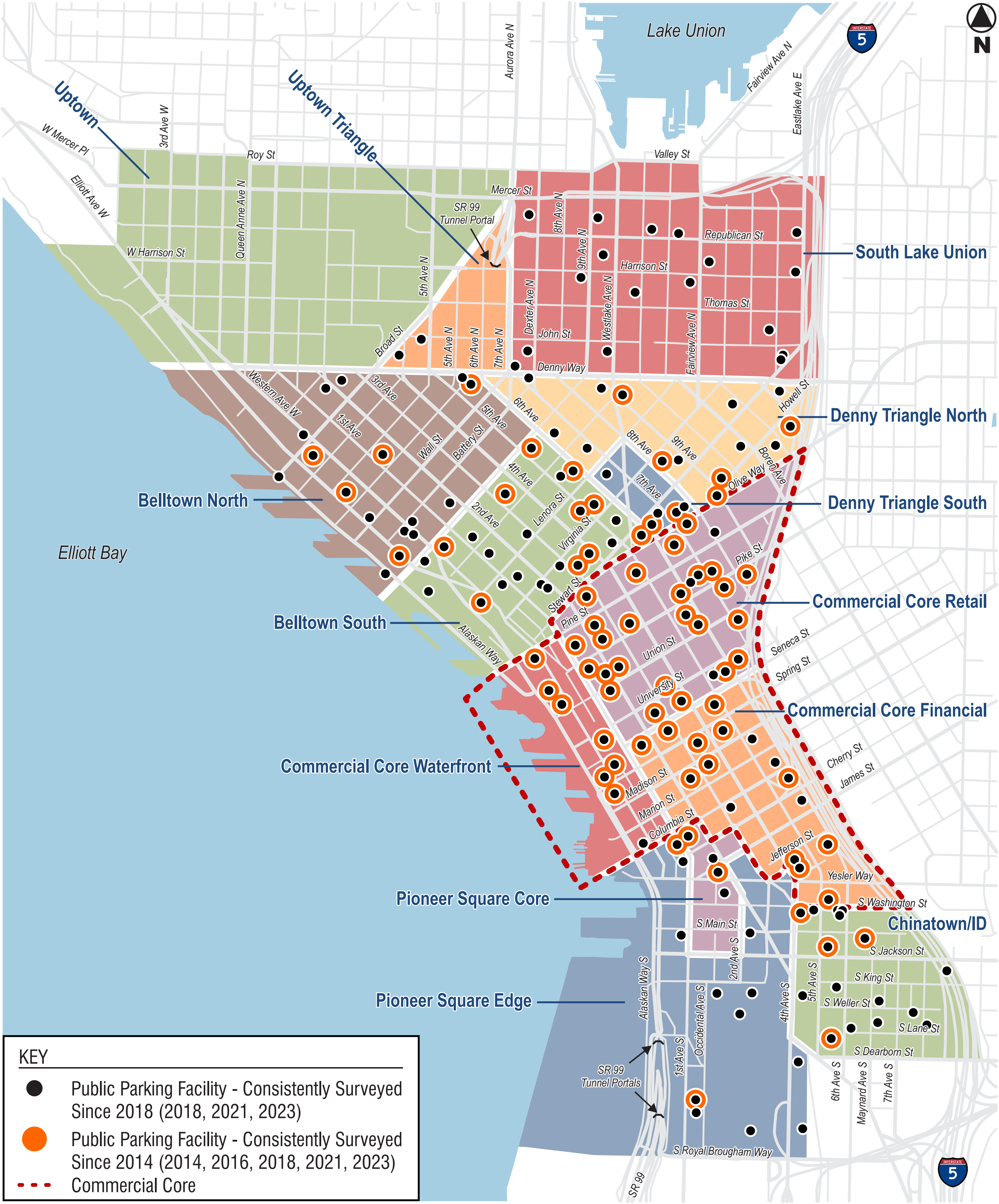
Source Heffron Transportation Inc., October 2023.

a. Data compiled and analyzed using the Historical Database developed by Heffron Transportation Inc.

b. Not Applicable, data was not collected for these study areas.

5.2. Change in Parking Occupancy

In the 2021 report, direct comparisons of parking occupancy were possible for 76 facilities that were consistently surveyed between 2014 and 2021. In 2023 this number declined to 74 facilities (24,736 spaces or about 43% of the total spaces surveyed in the 2023 study). By updating the starting year of comparison to 2018, direct comparisons were possible for 161 facilities (42,286 spaces or about 74% of the total spaces surveyed in the 2023 study). Figure 6 shows both the location of consistently studied facilities since 2018 and 2014.



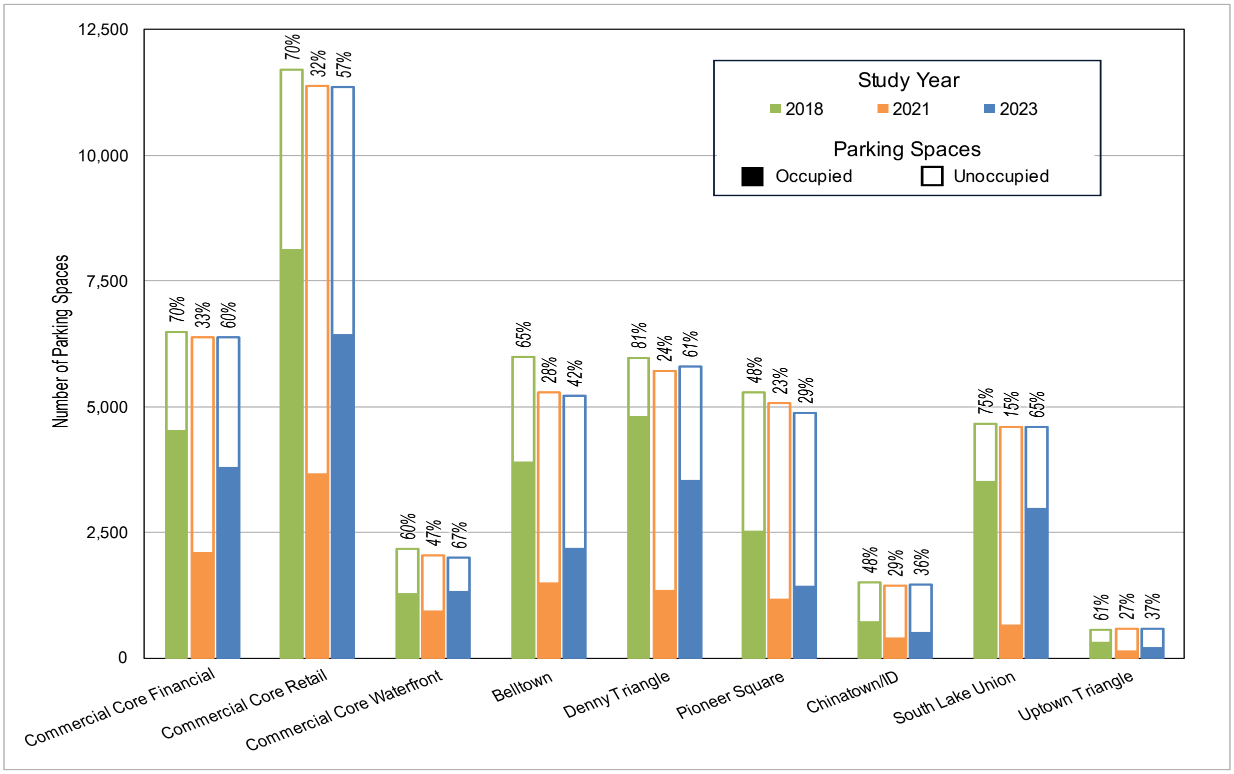
2023 CENTER CITY OFF-STREET PARKING STUDY

Figure 6
Comparison Facilities Across Survey Years

heffron transportation inc

Figure 7 compares the number of occupied spaces in the consistently studied facilities within each subarea. Overall, parking occupancy in the comparative facilities was highest in 2018 (67%) prior to the COVD-19 pandemic, and lowest in 2021 (28%) just after the mask mandates ended for the COVID-19 pandemic. The current 2023 study year shows continued signs of recovery with an overall parking occupancy rate of 53%. In the Commercial Core Waterfront, it appears parking occupancy slightly surpassed pre-pandemic levels, which is expected given that construction activity associated with the Alaskan Way Viaduct Demolition and Waterfront Seattle project has subsided considerably since 2018.

Figure 7. Change in Midday Parking Occupancy at Consistently Studied Facilities Since 2018



Source: Heffron Transportation, Inc., October 2023. Reflects the change in occupancy at 161 parking facilities for which survey data were consistently available between 2018 and 2023.

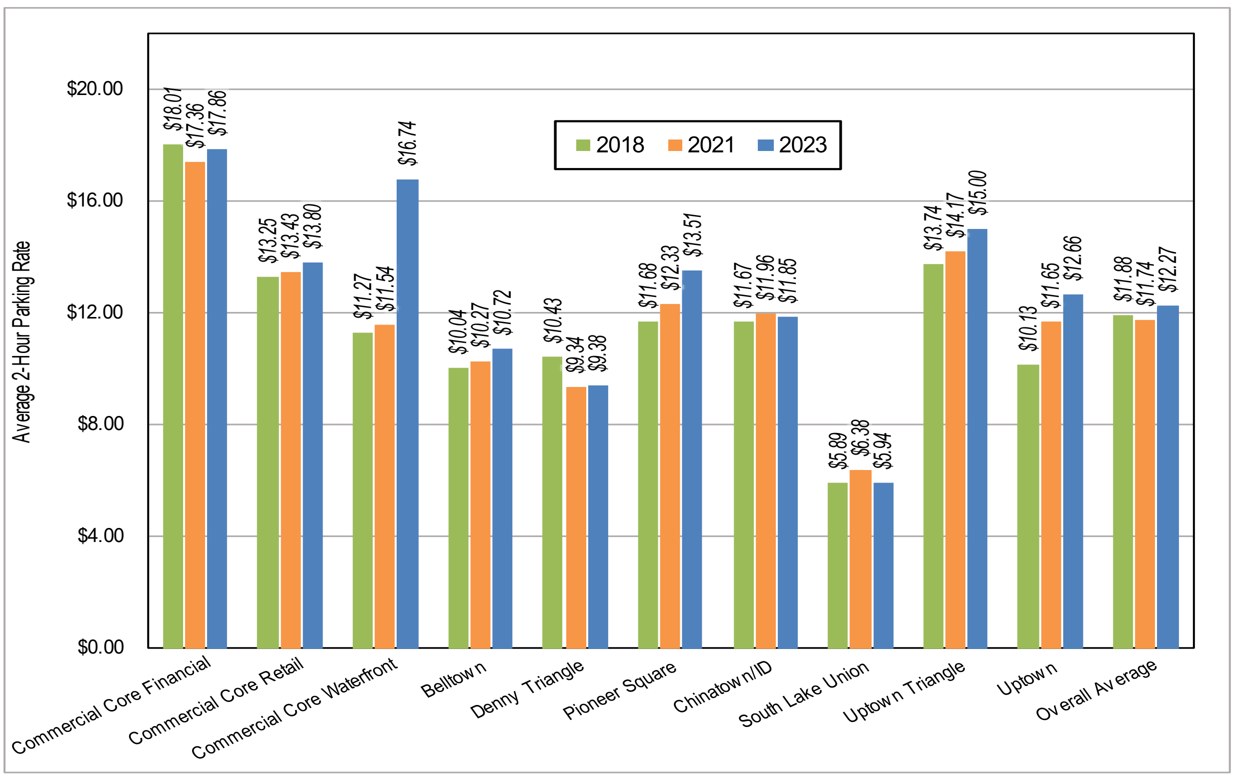
5.4. Change in Parking Rates

Table 8 and Figure 8 compare the parking rates between 2018 and 2023. As shown, the average rates for 2-hour parking declined in 2021 and then rebounded in 2023. Between 2018 and 2023 the average 2-hour parking rate increased by 3%.

In 2018 the average All-Day parking rate was $28.85. In the subsequent study year, the All-Day parking rate was split into two categories: 10-hour parking and 24-hour parking. In 2021, the average 10-hour parking rate was $26.40, and the average 24-hour parking rate was $31.91. In 2023 the average 10-hour parking rate increased to $27.08, and the average 24-hour parking rate increased to $33.58.

The number of parking facilities offering an Early Bird parking rate has increased over the past five years. In 2018, early bird rates were offered by 102 facilities (23,678 spaces), and in 2023, early bird rates were offered at 129 facilities (28,408 spaces). From the available data, the average Early Bird rate was $16.67 in 2018, $16.28 in 2021, and $16.35 in 2023.

Figure 8. Change in 2-Hour Parking Rates Since 2018



Source: Heffron Transportation, Inc., October 2023. Reflects the change in 2-Hour parking rates between 2018 and 2023.

Table 8. Change in Average Rates for Off-Street Parking – 2018 to 2023

	Average Rate by Space [a]										
							All-Day Parking [c]				
	2-Hour Parking			Early Bird Parking [b]			All	10-Hours		24-Hours	
Commercial Core Area	**2018**	**2021**	**2023**	**2018**	**2021**	**2023**	**2018**	**2021**	**2023**	**2021**	**2023**
Financial	$18.01	$17.36	$17.86	$16.44	$18.45	$18.40	$34.12	$31.86	$32.08	$35.96	$36.31
Retail	$13.25	$13.43	$13.80	$17.05	$16.65	$16.49	$32.94	$29.00	$29.60	$34.53	$35.41
Waterfront	$11.27	$11.54	$16.74	$17.65	$16.12	$17.03	$35.17	$28.42	$36.69	$33.98	$47.56
Commercial Core Average	*$14.78*	*$14.54*	*$15.44*	*$16.89*	*$17.22*	*$17.04*	*$33.59*	*$29.86*	*$31.08*	*$34.93*	*$36.86*
Areas outside Commercial Core											
Belltown North	$8.23	$7.94	$9.05	$13.74	$12.79	$13.62	$21.62	$18.36	$20.15	$22.67	$25.11
Belltown South	$12.04	$12.53	$12.20	$18.20	$17.50	$16.86	$29.73	$26.36	$26.88	$31.48	$32.76
Chinatown/ID	$11.67	$11.96	$11.85	$15.65	$15.98	$17.21	$23.66	$24.69	$24.74	$32.95	$32.87
Denny Triangle North	$10.94	$9.42	$9.28	$18.00	$16.70	$17.66	$32.35	$25.79	$27.51	$30.86	$32.92
Denny Triangle South	$9.57	$9.04	$9.68	$18.87	--	$15.80	$29.25	$25.37	$26.04	$29.86	$30.09
Pioneer Square Core	$12.17	$13.37	$17.51	$19.47	$17.26	$19.08	$39.76	$41.17	$50.43	$43.58	$47.89
Pioneer Square Edge	$11.58	$12.07	$12.66	$15.23	$15.46	$16.46	$25.26	$29.46	$24.83	$36.47	$39.41
South Lake Union	$5.89	$6.38	$5.94	$18.95	$17.70	$15.91	$25.08	$23.42	$23.39	$26.83	$26.96
Uptown	$10.13	$11.65	$12.66	--	$9.85	$11.30	$17.00	$16.61	$19.19	$28.10	$30.34
Uptown Triangle	$13.74	$14.17	$15.00	$11.22	$13.08	$15.00	$24.72	$24.92	$26.76	$30.00	$30.00
Areas Outside Commercial Core Average	*$9.69*	*$9.83*	*$10.29*	*$16.42*	*$15.10*	*$15.55*	*$26.78*	*$24.04*	*$24.56*	*$29.64*	*$31.20*
Overall Average	**$11.88**	**$11.74**	**$12.27**	**$16.67**	**$16.28**	**$16.35**	**$29.74**	**$26.40**	**$27.08**	**$31.91**	**$33.58**

Source: *Heffron Transportation, Inc.*, October 2023.

a. *The average rate includes taxes.*

b. *A discounted all-day parking rate that only applies to customers who arrive before a set time in the morning.*

c. *Starting in 2021, 10-hour and 24-hour all day parking rates were studied separately.*

6. Event Parking Rates near Climate Pledge Arena

Event parking rate data were collected in the Uptown subarea prior to the "The Postal Service & Death Cab for Cutie" concert hosted at the Climate Pledge Arena on Friday October 6, 2023. During the survey, 31 facilities were identified with posted event rates. The average flat-rate event parking fee was $32.16 and ranged from $20 to $60. Notably, 10 of the 31 parking facilities with posted event rates were facilities reserved during weekday hours for permit holders or businesses, or areas such as loading docks that are not typically used for parking. These facilities were included in the event analysis but not surveyed as part of the greater Center City parking study.

Finally, it was noted that the event parking rates were typically posted on stand-alone sandwich boards indicating that rates may shift fairly frequently depending on demand. See the images below for examples of parking rate signage:

Source: Heffron Transportation, Inc., Surveys performed in October 2023

7. Findings

The following summarizes the findings of the 2023 Center City Off-Street Parking Study, which collected parking occupancy data in October 2023:

- Weekday parking occupancy in the Commercial Core was 58%, which is about 10% lower than in 2018 but substantially higher than the 34% occupancy rate measured in 2021. The highest occupancy rates were recorded for the Commercial Core Waterfront with 67%. Parking supply in the Commercial Core decreased by 138 spaces (-1%) between 2021 and 2023.

- In areas outside the Commercial Core, parking was 48% occupied on weekdays. That is about 24% higher than 2021 but 21% lower than in 2018. The highest occupancy was in the Denny Triangle North with 69% occupancy. The lowest occupancy was in the Uptown with 22% followed by Pioneer Square Edge with 28%. Parking supply outside the Commercial Core decreased by 289 spaces (-1%) between 2021 and 2023.

- Overall parking occupancy rates from the select facilities surveyed on Saturdays were 27% in 2023. This is an increase of about 10% from 2021 and close to the 33% occupancy measured in 2018. Weekend occupancy was highest in the Commercial Core Waterfront at 54%; however, this value is substantially lower than the 63% occupancy measured in 2021 and 70% occupancy measured in 2018.

- The average 2-hour parking rate increased by about 3%, from $11.88 in 2018 to $12.27 in 2023. Since 2018, 2-hour parking rates increased by about 33% in the Commercial Core Waterfront, about 31% in the Pioneer Square Core, about 20% in Uptown and decreased by 18% in Denny Triangle North.

- The 2-hour on-street parking rate in South Lake Union is nearly twice that of the average off-street rate, and in the Denny Triangle, off-street and on-street rates are nearly equivalent. In all other subareas on-street parking rates are substantially less than off-street parking rates.

- The average Early Bird parking rate decreased by about 2%, from $16.67 in 2018 to $16.35 in 2023. Since 2018, Early Bird parking rates notably increased by about 11% in the Commercial Core Financial and decreased by about 19% in both Denny Triangle South and South Lake Union.

- The All-Day 10-hour parking rate increased by about 3%, from $26.40 in 2021 to $27.08 in 2023. Since 2021, the All-Day 10-hour parking rate notably increased by about 23% in the Commercial Core Waterfront, about 18% in Pioneer Square Core, and decreased by about 19% in Pioneer Square Edge.

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