

Figure 2.11A: Prototypical Downtown Street Sections

Existing Soscol Avenue - Looking North Between Pearl and Clinton

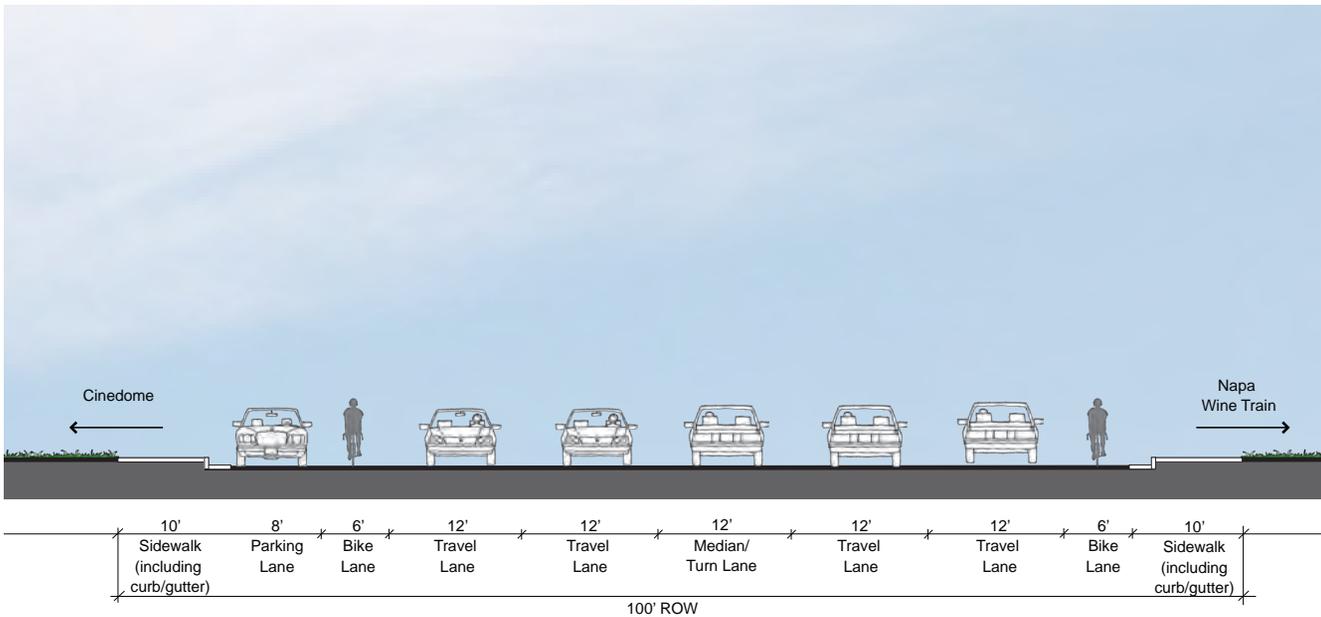
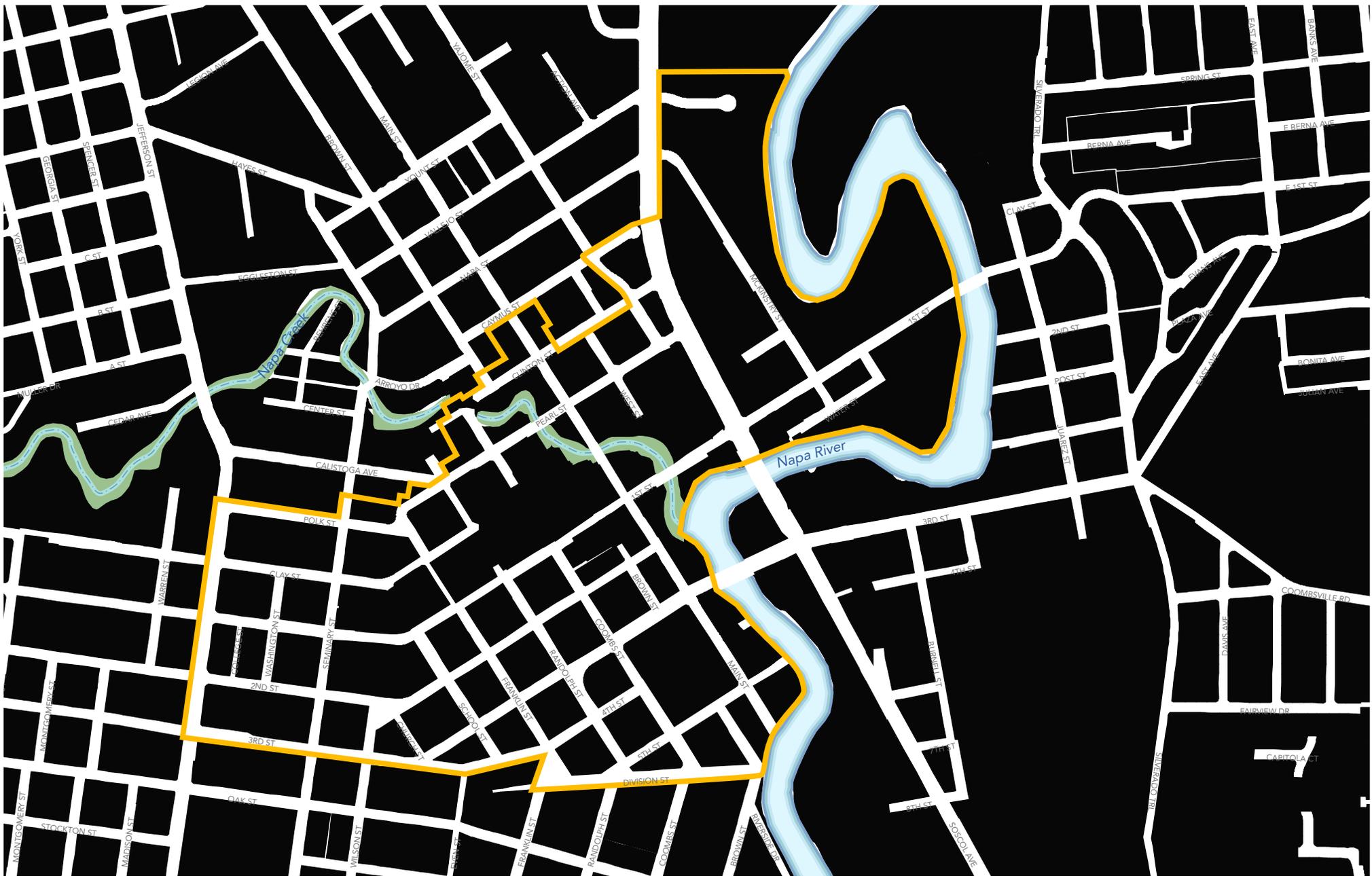


Figure 2.11B: Prototypical Downtown Street Section

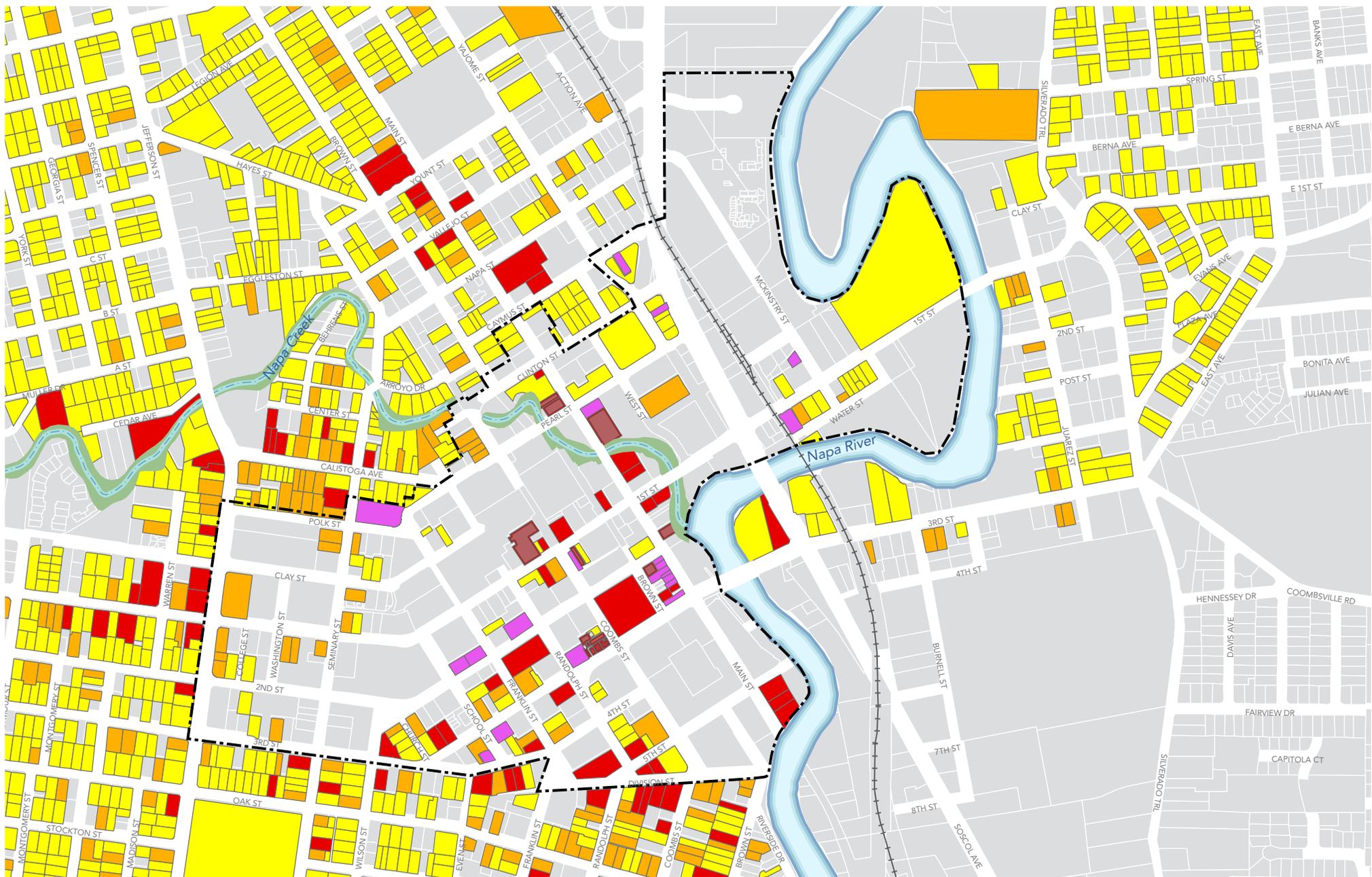


- Planning Area
- Parcels
- City Block



Figure 2.12: Block Figure Ground

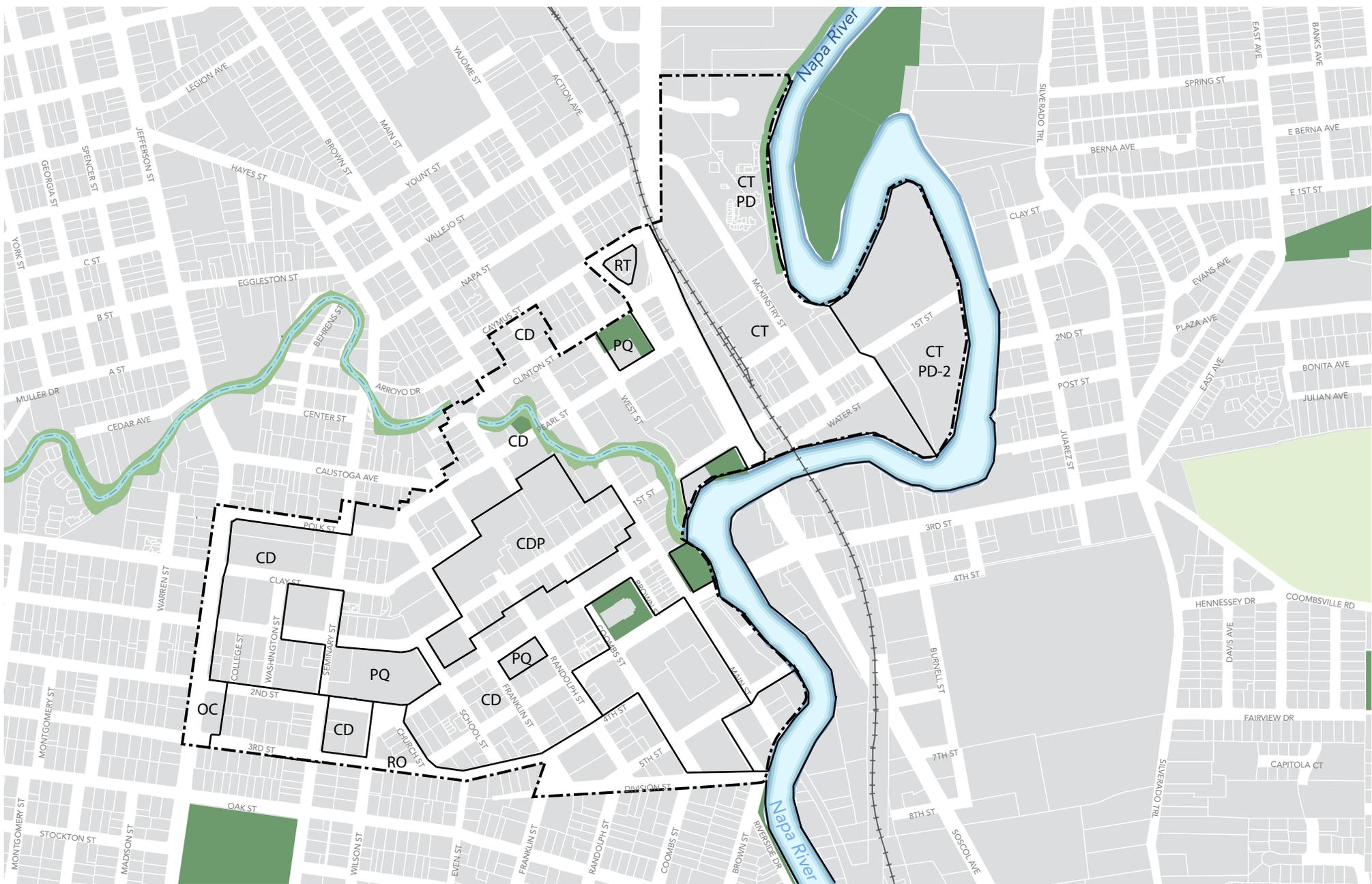
DOWNTOWN NAPA SPECIFIC PLAN



- Planning Area
- Parcels
- Water
- Railroad
- Currently HRI Ranking 1
- Currently HRI Ranking 2
- Currently HRI Ranking 3
- Recommended Addition to HRI
- Potential Recommended Addition to HRI Pending Further Research or Removal of Past Altercations Possibly Hiding Original Material



Figure 2.13: Historical Resources Inventory

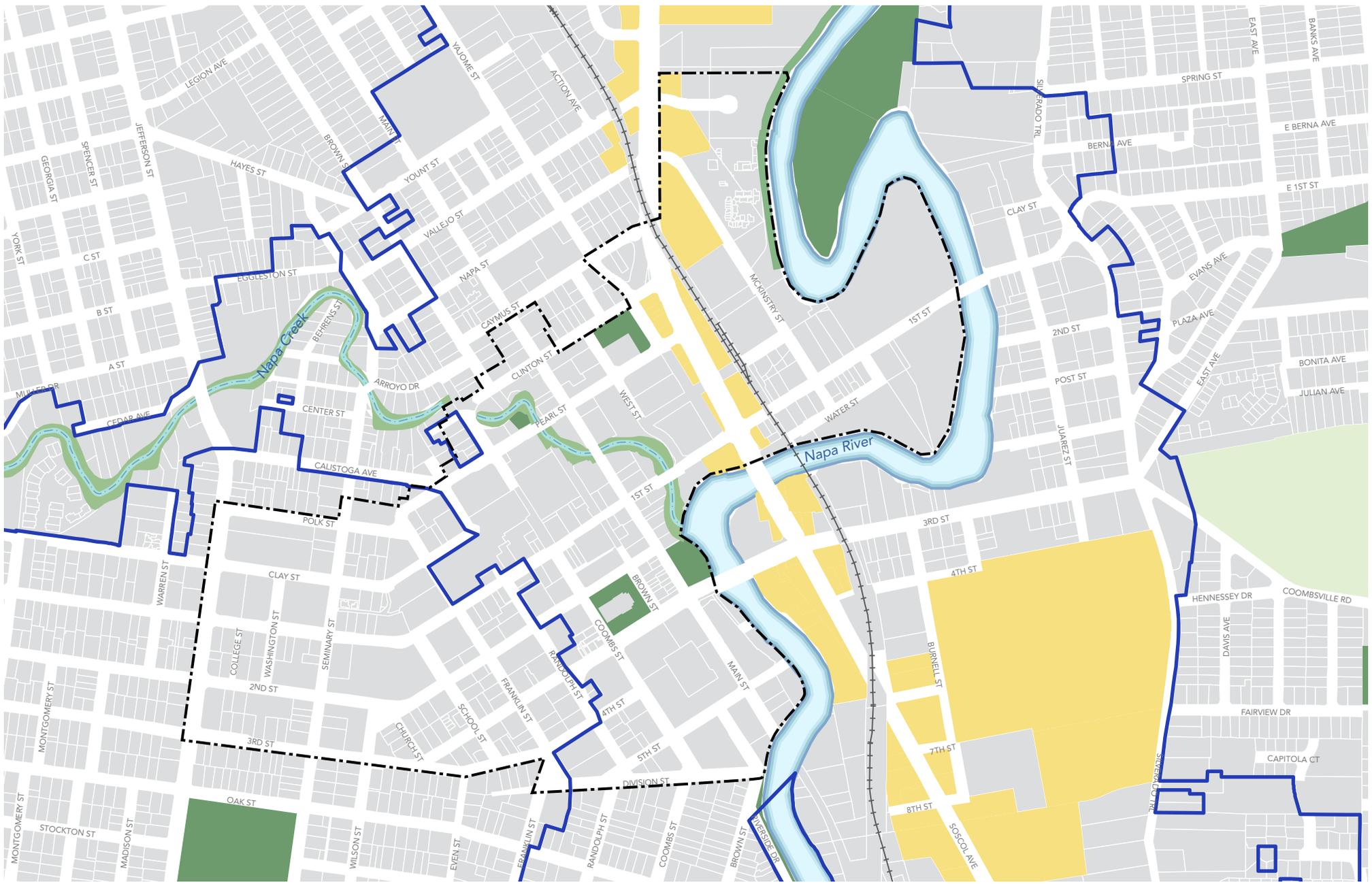


- | | | | |
|---------------|------------------|--------------------------------------|---------------------------|
| Planning Area | Other Open Space | CD - Downtown Commercial | OC - Commercial Office |
| Parcel | Water | CDP - Downtown Pedestrian Commercial | CT - Tourist Commercial |
| Railroad | | RO - Residential Office | PQ - Public/Quasi Public |
| | | RT - Traditional Residential Infill | POS - Park and Open Space |



Figure 2.14: Zoning

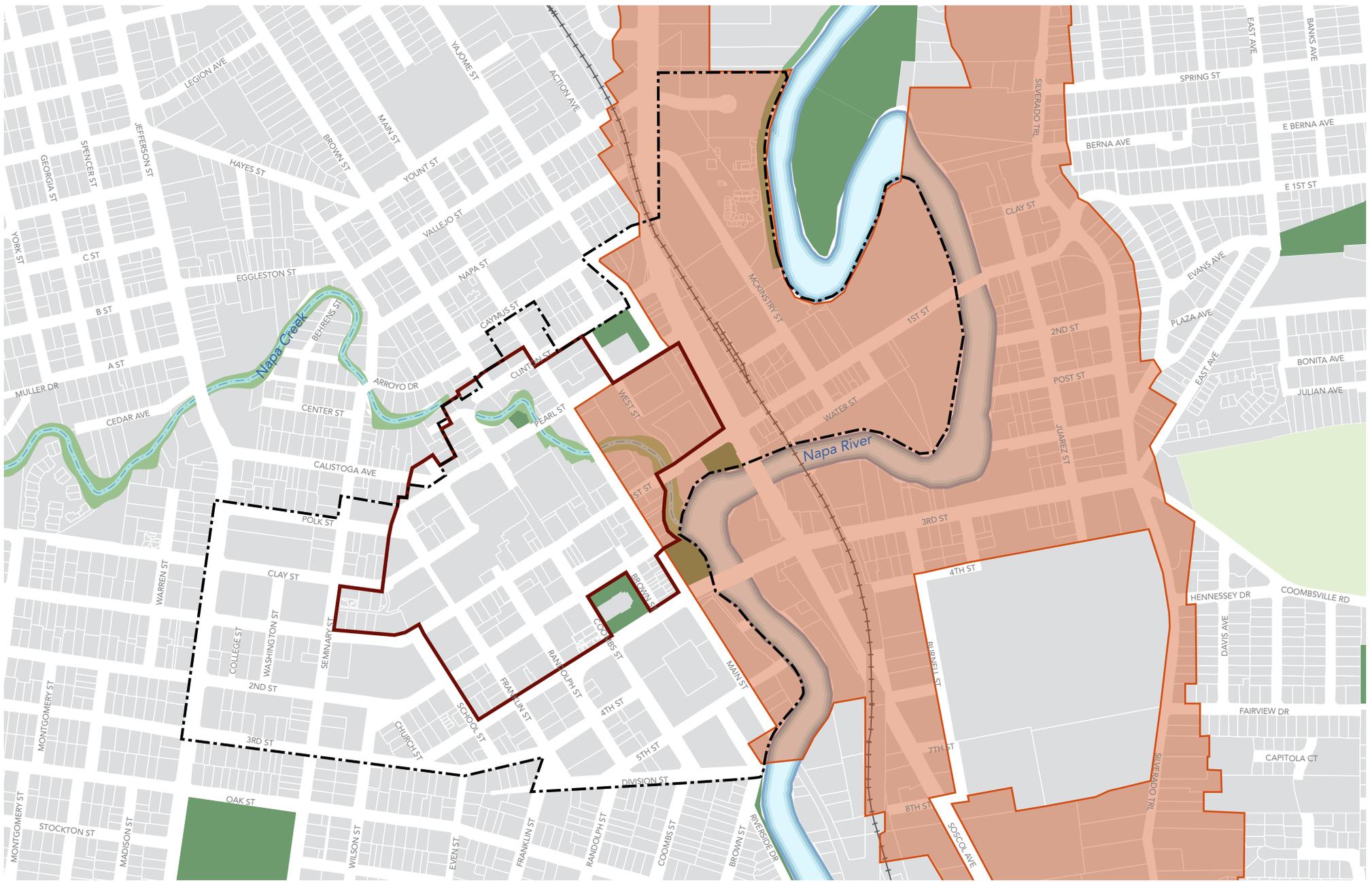
DOWNTOWN NAPA SPECIFIC PLAN



- Planning Area
- Other Open Space
- Flood Plain Overlay
- Parcel
- Water
- Traffic Impact
- Park
- Railroad



Figure 2.15A: Zoning Overlay Districts



- Planning Area
- Other Open Space
- Parking Exempt District
- Parcel
- Water
- Soscol Corridor
- Park
- Railroad



Figure 2.15B: Zoning Overlay Districts

III. Market Demand Analysis

This section provides an overview of the economic and market conditions affecting growth and redevelopment opportunities in the Planning Area.

Key Findings

- While still rather rural in nature, both the County and the City of Napa have experienced a steady population and household growth over the last 10 years, a trend that most projections suggest will continue. Meanwhile real incomes are also expected to increase as the regions' fundamental economic prospects improve. The growth in households and income will result in increased demand for residential development and provide opportunities for expanded retail offerings.
- Once a manufacturing and industrial economy, the Napa Region's evolving economy is now heavily based on tourism and the wine industry. Employment in the County and City of Napa has increased steadily since 2000, about 14 percent overall, and healthy employment growth is expected in the hospitality industry, as well as Finance and Professional Service Jobs and Health, Educational, and Recreational Service Jobs. The expanding labor force will support more workplace development, such as office space, and provide additional job opportunities for residents in the Planning Area and the City overall.
- Currently Downtown Napa is a predominantly commercial area with limited residential units. However, a desirable environment and amenities, regional population demand, and local land constraints will make higher-density housing in Downtown Napa more attractive. Residential development opportunities are likely to be most constrained by current market conditions as well as a limited number of sites.
- There has been significant retail development in Downtown Napa since 2000 with a strong emphasis on hospitality, culinary and other leisure- and/or tourist-related establishments. However, the Downtown has been less focused on attracting or retaining convenience-related retail tenants and those more focused on meeting the daily shopping needs of local residents, and many of the Downtown tenants oriented towards this segment are struggling. The Downtown's recent success in cultivating its position in the regional tourism market, supported by a variety of public and private initiatives, is likely to cause the district to improve its reputation and range of offerings that cater to this segment.
- With Napa River Flood Project improvements reducing flooding, the City of Napa is now starting to benefit from the "cache" of the Napa Valley, and Downtown Napa is becoming a part of the visitor experience with entertainment offerings and new hotel development. Over the years, the regional hotel market has matured, attracting larger hotels and fostering more resort destinations, as further evidenced by recent hotel projects in the Downtown. Recent hotel investments coupled with the strong tourism industry suggest a favorable long-term market environment and the ability to attract additional lodging to the Downtown.

- The Napa Region is home to an emerging office market that has experienced impressive gains in the last ten years, even as other Bay Area markets have faltered. Although the recent economic downturn has led to the loss of some office tenants and vacancies, in the long term the Downtown appears relatively well-positioned to capture an increasing share of the Napa Region's growing office market, assuming adequate space is available. With the City's largest business park approaching buildout and continued employment growth in finance, professional services, health, education and other white-collar professions, the Downtown is becoming an increasingly competitive location. In addition, the gradual improvement in level of services, amenities, and built environment offered in the Downtown has helped foster a setting that is more attractive to a wide range of business tenants.
- Overall Downtown Napa is well-positioned to attract tenants and continued investment in a variety of higher-density real estate products. In the very near term, tenancing and (re)-development activity is likely to be constrained by the current economic environment, especially as it relates to access to real estate investment capital and consumer demand for the higher-end and/or leisure retail and services market segments and limited sites.

Policy Context

The City's General Plan recognizes Downtown Napa as an important economic asset and contains a number of goals, policies, and implementation programs designed to preserve and strengthen this function. For example, the Land Use, Transportation, Parks and Recreation, and Historic Preservation sections of the General Plan all include policies to support the Downtown as a vital commercial core with a mix of uses and building types, recreational amenities, and a pedestrian-friendly environment, as discussed elsewhere in this Report. Specific implementation programs range from support for business recruitment, parking, and infrastructure to specialized design, land use, and planning requirements or initiatives.

In addition to the General Plan sections noted above, both the Economic Development and Housing sections also include a number of policies and implementation programs that have and will continue to play an important role in the Downtowns' economic success. Chief among these include:

- **Public Improvements:** Economic Development policies direct the City to pursue a variety of infrastructure improvements of benefit to the Downtown. It also directs staff to "work closely with the Napa County Flood Control and Water Conservation District and U.S. Army Corps of Engineers to ensure the Flood Protection Plan is consistent with the City's waterfront vision, maximizes pedestrian access to the riverfront, and ensures continuity of design among all the flood protection features including the river trail, bypass channel, flood walls, bridges, and Veteran's Park."
- **Hotel Development:** Economic Development policies direct the City to promote hotel development in Downtown by identifying sites, evaluating market trends, and working with property owners. It also directs the City to consider conference space in conjunction with the evaluation of hotel uses.

- **Parking Availability:** The Economic Development section, as well as other sections of the General Plan, directs the City to pursue a variety of measures to maintain an adequate inventory of parking facilities Downtown. As part of this effort, the City has established a Parking Exempt District which allows developers to pay a fee in-lieu instead of providing parking on-site.
- **Business Recruitment:** Economic Development policies direct the City to pursue initiatives and policies that support the recruitment and expansion of specialty retail, entertainment and cultural venues and events, and other land uses or tenants that cater to visitors and the discretionary spending of residents.
- **Housing Density:** The Housing Element directs the City to promote and encourage mixed use and higher density development patterns Downtown. It also establishes a maximum density of 40 to 45 units per acre for the Downtown Commercial Area.

It is worth noting that much of the Planning Area is located in a Redevelopment Area which, among other things, allows for the use of tax increment financing to support infrastructure investment and land acquisition; however, the Project Area will expire in 2012. In addition, the City requires a 10 percent affordable housing set-aside for all new residential development, although this can be satisfied off-site.

Economic Context

An over-arching issue presently facing development in the City of Napa, as elsewhere in the region, is the ongoing national recession. Current market conditions are weak across the range of potential uses reflecting the national recession, instability in the credit and capital markets, reductions in retail expenditures, and declining housing prices. These conditions are likely to continue for a number of years; general consensus is that it will be 2012 before there is a return to more normal market conditions, although the pace and timing of recovery is likely to vary regionally. Even then there may be significant changes in real estate demand and markets across the range of uses including retail commercial space, office space, hotel, and housing. Although the current economic environment is an important issue affected by development feasibility, this analysis is provided in the context of a Specific Plan and thus focuses on longer-term trends and market fundamentals.

Socioeconomic Overview

This section provides an overview of the local and regional economic and demographic trends that help shape development opportunities in Downtown Napa. It focuses on factors such as population growth, household size, age, and income levels, employment trends, and commute patterns. All of these factors can affect the amount and type of development that would be likely to be attracted to Downtown Napa.

Demographic Trends

Households and population

The Napa region with a strong agricultural and wine industry and abundant open space is still somewhat rural in nature compared to the other counties in the San Francisco Bay region. Despite its rural nature, both the County and City of Napa have experienced relatively steady population growth over the last ten years, making it the second fastest

growing county among the nine San Francisco Bay Area counties. Specifically, between 2000 and 2008, the County grew by about 1.4 percent per year or by 11 percent while the City grew by 1.1 percent per year or by 9 percent (see Table 1). The City of Napa accounted for about 62 percent of total County growth although American Canyon grew the fastest at 6.4 percent per year. By way of comparison, the neighboring counties of Solano, Contra Costa, Sonoma, and Marin grew by 14, 10, 9, and 4 percent, respectively, in the same period, while the nine County Bay Area grew by 8 percent.

Up-to-date household and population growth estimates for the Downtown Planning Area are not available from public sources. However, according to Claritas, a private vendor of demographic and market data, household growth in the Downtown Area was stagnant. However, the Downtown Riverfront being completed in 2009 will add to Downtown's housing stock.

The Citywide household growth trends are expected to continue, if not decline slightly. According to the Association of Bay Area Governments (ABAG), household growth is expected to be about 1 percent per year between 2005 and 2030, or an average of about 240 households per year. In 2030, there are expected to be an estimated 36,000 households in the City, an increase of about 6,000 households from 2005, a 20 percent increase. If accurate, this suggests healthy household growth potential in the Downtown.

Age distribution

There appears to be notable differences in the age distribution within households in the Downtown Planning Area relative to the City as a whole, according to data from the U.S. Census and Claritas (see Table 3). Consistent with other downtowns, the population in the Downtown Planning Area tends to be younger, working-age with no children. As shown, there are proportionately more 18 to 34 year-olds in the Downtown Planning Area than in the City, 34 percent versus 24 percent, respectively. Moreover, there are fewer children in the Downtown Planning Area than in the City (15 percent compared to 23 percent, respectively), suggesting that more households with children choose to live in other areas of the City potentially because of larger homes and lots appealing to families. The City's population is also proportionately older than the Downtown Planning Area population (those 65 years and older represent 14 percent of the City's population compared to 7 percent in the Downtown Planning Area).

Household incomes

Household incomes in Napa County fall within the middle of the range of incomes in the Bay Area overall. In 2005 the County's mean household income of \$85,900 was not as high as those in San Mateo and Marin Counties (\$121,700 and \$121,600, respectively), but were higher than the incomes in the proximate counties of Solano and Sonoma (\$84,400 and \$82,600, respectively).

The City's mean household income of \$81,800 is slightly lower than the County (see Table 1). However, household incomes in the City are expected to increase at a faster pace than the County. In fact, in 2030 the City's mean household income is expected to be equal to the household income in the County at \$111,800.

The Downtown Planning Area's median household income appears to be lower than that of the City and County overall based on the limited data available (with only a small number of Downtown units). Specifically, median household income in the Downtown

Planning Area of about \$41,100 in 2008 compares to \$61,500 Citywide. Again, below-average household incomes are not uncommon in Downtown areas because these areas typically have a larger percentage of smaller, higher-density, and older units often with only one income earner.

Employment Trends

The type and amount of employment growth in the Napa region will impact development opportunities in the Downtown Planning Area in two primary ways: (1) it will influence the type of tenants that choose to locate there and (2) it will provide job opportunities for potential Downtown and citywide residents.

Historically, the Napa region was known primarily for its tanneries and industrial pursuits. Although manufacturing still accounts for 18.3 percent of the County's total employment, which totaled 70,000 jobs in 2008, according to the California Employment Development Department (EDD), the region is increasingly attracting tourism-related jobs driven by the wine, culinary, and recreation sectors (see Table 4). Historically, agricultural and wine interests developed north of the City while much of the light industry, banking, commercial and retail activity evolved within the City and along the Napa River through the Downtown. The region's evolving economy is now heavily based on tourism, which directly accounts for 14.2 percent of County employment but is indirectly represented in manufacturing, retail and whole-trade, and other sectors. The other major employment sector is Government, which accounts for about 16.5 percent of the County's jobs.

Overall, the number of jobs in the County increased by almost 8,000, or by about 14 percent, between 2000 and 2008 with the leisure and hospitality and manufacturing sectors accounting for the largest share of growth. Other sectors experiencing significant employment increases include Trade, Transportation, and Utilities (1,300 new jobs) and Government (1,200 new jobs). Some of the major County employers include Napa State Hospital, Napa Unified School District, Cultured Stone Corporation, and Queen of the Valley Hospital.

Employment trends in the City of Napa have been similar to those in the County. According to the EDD, employment in City grew from about 40,000 in 2001 to 45,000 in 2008, an average annual growth rate of 1.6 percent (see Table 5). Management of Companies and Enterprises experienced the most significant employment growth (13.4 percent annually), followed by Transportation and Warehousing (6.8 percent annually) and Educational Services (6.4 percent annually). In 2007, the major employers in the City that employed over 1,000 workers included Regulus, Napa County, and Queen of the Valley Hospital (see Table 6).

ABAG projections indicate that between 2008 and 2030, the City is expected to have an additional 10,000 jobs (see Table 7), representing an increase of 1.1 percent annually, a slight decline from 2001 to 2008 (1.6 percent annually). However, the growth in specific industries is expected to change somewhat with the most significant increases expected in Finance and Professional Service Jobs and Health, Educational, and Recreational Service Jobs industries. Combined, these two industries account for almost 65 percent of the expected job growth from 2008 to 2030.

Some of the City's larger employers are located in the Downtown Planning Area which has been increasingly successful in attracting new jobs. There were an estimated 5,800 jobs in the Downtown Planning Area in 2008, with a higher emphasis on retail, public sector, and services than the City and County as a whole (see Table 2).¹ In addition, five of the City's largest employers are located in the Downtown Planning Area, accounting for about 30 percent of the jobs provided by the City's major employers (see Table 6). Combined, these five businesses account for a substantial percentage of the jobs in the Downtown Planning Area and include the City and County of Napa, Vintage Bank, the Napa Valley Wine Train and the Napa Register. However, it is important to note that not all Napa County jobs are located in Downtown Napa.

Commuting Patterns

Commute patterns provide important insight into the location decisions of both residents and employers. In the long run, areas such as Napa which are not major job centers will need to expand economically in order to sustain future population.

Historical data on Napa's jobs-housing balance and jobs to employee ratios suggest that the City has maintained relatively balanced population and employment growth. Specifically, since 2000 the City has consistently provided about 1.4 jobs per household (see Table 8). The ratio is slightly more favorable than the County overall, which provides about 1.3 jobs per household. The City also slightly outperforms the County in its jobs to employee ratio, suggesting a net in-commute. The City provided about 0.98 jobs per resident in the workforce in 2008, while the County currently provides about 0.91 jobs per resident in the workforce.

Although the City currently functions as an employment hub in the County it is not a regional job center. For example, according to US Census Journey-to-Work, the City had about 4,400 more employed residents than jobs in 2000 (see Table 9). In other words, there is a net out-commute of workers to other locations. However, the majority of the City's workforce, or about 58 percent, are local residents while about 17 percent commute from other parts of the County and 25 percent live outside of the County. Meanwhile, just over half of Napa's residents work within the City, and about 28 percent work elsewhere in Napa County, while only 21 percent work outside of the County. Overall, while the City provides fewer jobs than it has employed residents, a large proportion of the jobs it does provide are held by workers living in the City or County.

Residential Market

This section assesses the market support for new residential development in the Downtown Napa Specific Planning Area. It describes the regional context for residential development and the market performance and prospects for new housing in the Downtown Planning Area.

Housing Types

While the housing stock in the City remains dominated by single-family units, recent development patterns suggest an increasing trend toward higher density housing types. Of the approximately 30,000 housing units in the City in 2008, roughly 70 percent were

¹ This Claritas estimate of Downtown Planning Area employment is slightly higher than an estimate derived by multiplying the City's data of occupied commercial square feet in the Planning Area by an average 350 building square feet per employee assumption (see Table 17).

single-family (see Table 10). While single-family attached units experienced the fastest growth from 2005 to 2008, multifamily units experienced the largest growth from 1995 to 2005.

According to the May 2004 Downtown Napa Mixed-Use and Residential Infill Development Strategy, conducted by the Napa Community Redevelopment Agency, multifamily rental units in the City consist mainly of one-bedroom and two-bedroom units, 43 percent and 55 percent, respectively. Currently, there are very few three-bedroom units.

With only about 75 housing units, plus 50 new multi-family units just being completed at the Riverfront Mixed Use development on Main Street, the Downtown Planning Area is dominated by commercial uses. The housing stock that does exist is generally higher density than the City as a whole. According to a survey of Downtown Planning Area parcels provided by the City, roughly 75 percent of the housing units in the Downtown Planning Area are multifamily, compared to 27 percent in the City, (see Table 11). However, the Downtown Planning Area is surrounded by older historic housing neighborhoods. There are National Register historic districts adjacent to Downtown - Napa Abajo/Fuller Park as well as the Calistoga Avenue Conservation District. In general, these are low-density, single-family neighborhoods, but they do contain a variety of housing types. Before the recent economic downturn a number of these properties were renovated or redeveloped.

Market Performance Indicators

The boom followed by bust market trajectory that has characterized the national residential real estate sector over the last 10 years has had widely different impacts on the various markets and submarket in the San Francisco Bay Area. While some of the outlying areas have experienced significant reductions in prices, many areas closer to the urban cores of San Francisco and Silicon Valley have proven more resilient. In general, Napa had fallen somewhere in the middle with price declines and foreclosure rates higher than the more affluent Bay Area Counties such as San Francisco, San Mateo, and Marin areas but not nearly as steep as Sonoma or Solano Counties or elsewhere in the State.

Mortgages and foreclosures

The current financial crisis, which was driven by subprime mortgage defaults and the associated home foreclosures, resulted in a significant cutback on lending practices and available capital, reducing demand for homes. It also resulted in a large number of homes entering the market, further deflating home prices. California has the highest number of subprime mortgages in the nation and Napa County was also affected by this lending practice. The foreclosure rate in Napa County is roughly 1.4 percent, which is lower than Solano, Contra Costa, and Alameda Counties, but is higher than the Counties of San Mateo, Marin, and San Francisco (see Table 12). The foreclosure rate in the City of Napa is comparable to the rate in the County. However, Maps of Foreclosures produced by the City Housing Division with 2008 and early 2009 data from Foreclosure Radar found no foreclosures within the Downtown Planning Area.

Home prices

Following national trends, home values in the City increased in the early 2000s and then dropped in the past couple of years. Between 2000 and 2006 the median home value in

the City almost doubled, increasing from \$360,000 to \$630,000. However, home values have dropped considerably over the past couple of years and the median value is now approximately \$325,000, which is less than 2002 median home values.

Currently, housing prices in Napa County are in the middle of the range of housing prices in the Bay Area overall. In February 2009, the County's median sales price of \$322,500 was lower than Marin and San Francisco (\$775,000 and \$736,000), but was higher than the median sales prices in Solano and Sonoma Counties (\$195,000 and \$282,000). The median sales price in the City is slightly higher than the County at \$325,000 (see Table 13).

While multifamily rental units represent a relatively small portion of the housing units in the City, the apartment market in Napa County is faring better than the for-sale housing market and has exhibited stability over the past five years (see Table 14). Between 2004 and 2008 the average rent remained fairly stagnant, while the vacancy rate decreased from 5 percent to 2 percent in 2008. The City's apartment market also exhibited stability over the same time period. The City's surveyed vacancy rate for apartments with more than 20 units decreased from 3.2 percent in 2004 to 1.6 percent in mid-2008.

The 2004 Downtown Napa Mixed-Use and Residential Infill Development Strategy identified that at that time, for-sale housing was the most economically viable for residential and/or mixed-use development in Downtown Napa. Ownership housing is often better able to pay for the underlying land costs, whereas rental housing may require public financing assistance. As previously discussed, for-sale housing does not command the same sales prices as they once did. Median home values have decreased significantly since the study was originally conducted, while rents for apartments have remained stable. Additional analysis is required to determine the financial feasibility of for-sale versus rental housing given current economic conditions.

Development activity

As noted earlier, new residential development in the City has exhibited a trend toward smaller product types such as townhomes and multifamily units. While the substantial amount of new real estate investment in the Downtown in recent years focuses on commercial rather than residential development (see Table 15), one recent project was in Downtown:

- **The Riverfront:** Located along the Napa River on Main Street, the Riverfront is a mixed-use project that includes 50 residential units. The units are one- and two-bedroom units that range in size from 860 square feet to 2,134 square feet. The condominiums range in price from the high-\$400,000 to \$1.3 million. However, only a limited number of the 50 units have sold as of May 2009.

Other higher density residential projects elsewhere in the City include:

- **Lincoln Gardens:** Built in 2004, Lincoln Gardens is a 30-unit apartment and townhome development on a 1.5 acre site located at 1802 F Street. The project consists of single-story units with rents starting at \$1,475 per month and two-story townhomes with rents starting at \$1,675 per month.

- **Jasna Commons:** Completed in 2009, Jasna Commons is an in-fill mixed-use project with townhomes and live/work units on Walnut Street. The project includes 8 residential units and ground floor commercial on a 0.4 acre site.

Outlook and Development Implications

Despite current economic conditions, the longer-term strength of the larger San Francisco Bay Area economy will continue to provide spill-over demand for housing in desirable locations such as Napa. ABAG projections suggest the City's population will continue to grow over the next 20 years, albeit as a slower rate than last ten years, which would imply opportunity for new housing development in the Downtown Planning Area. While, these projections reflect underlying market economics, specific land use decisions or policies by the City can have an effect on encouraging development in select locations such as the Downtown Planning Area.

The typical market segments for higher-density housing in Downtown areas include young, employed singles and couples as well as empty nesters. These groups desire to live downtown because they offer a wide variety of cultural and social opportunities and experiences. The age distribution in the City of Napa and the Downtown Planning Area, previously discussed, indicates that a large percentage of the population fall within the target market and can further increase demand for housing in the Downtown Planning Area (see Table 3). However, continued employment growth, especially in sectors attractive to younger, entry-level employees, will be an important factor driving future residential demand Downtown.

Another factor that will continue to make Napa a competitive housing market is its relatively low crime rate compared to neighboring counties and other comparable cities, (see Table 16). In 2007, the City of Napa had a violent crime rate of 377 per 100,000 persons, which was higher than the comparably-sized suburban cities of Livermore and Pleasanton, but much lower than the nearby cities of Fairfield, San Rafael, Santa Rosa, Vallejo, and others. It is also lower than all surrounding Bay Area counties except Marin.

Schools are another factor that can contribute to Napa's competitive housing market. Downtown Napa is served by Shearer Charter Elementary School as well as the private Blue Oak Elementary School, located in a renovated historic facility, and St. John's Catholic School. Parents can also take advantage of district wide open enrollment policies.

Overall, the Downtown offers an attractive setting, desirable amenities, and an expanding array of entertainment and retail opportunities (including a Downtown grocery store) that make it an appealing place to live. Residential development opportunities are likely to be most constrained by current market conditions as well as limited sites. However, the Housing Element Update has identified over 20 sites in the Downtown Planning Area that would accommodate additional units either as stand-alone or mixed-use projects. Of course, City policies, including zoning, parking, fees, and financial assistance will also play a role in development feasibility.

Retail Market

This section assesses the potential for new retail development in the Downtown Napa Specific Plan Area. Specifically the various components of retail demand (e.g.,

households, employees, businesses, and visitors) are compared to the current supply of retail in the City overall and in the Downtown Planning Area.

The recent economic trends suggest that the national retail market is likely to undergo significant transformation in upcoming years, including substantial consolidation and store closings. The combination of increasing unemployment rates, reduced consumer credit, and a potential oversupply of retail space has resulted in bankruptcies, store closures, and consolidations among a wide range of formerly successful retail chains, including Mervyn's, Sharper Image, and KB Toys (bankruptcy); Linens 'N Things, Circuit City, Office Depot, Home Expo, and Starbucks (closures); and CVS's acquisition of Long's Drugs (consolidation). However, Mervyn's was the only national chain store to close in Napa. A major shake-up in the retail market presents a high degree of uncertainty with regard to tenanting and forecasting absorption. In the long term it also offers new opportunities as more competitive retail tenants, concepts, and formats emerge and search out new locations. Retail market opportunities in the Napa Region and the Planning Area, specifically, are assessed under this national context.

Retail Market Supply Overview

The City of Napa offers a diverse mix of retail options including several neighborhood serving shopping centers, a premium outlet, and a variety of tourist oriented stores. As of 2008 there were approximately 13 retail centers for a total of 1.5 million square feet of gross leasable area (see Table 17). The largest retail centers exist outside the Downtown Planning Area and cater to the convenience related shopping and the daily needs of local residents. The most prominent of these include the South Napa Marketplace and the recently renovated Bel Aire Plaza.

Retail in Downtown Napa consists mainly of small specialty boutiques, antique stores, home furnishings, and visitor-oriented retail, as well as restaurants and wine tasting rooms. The area is dominated by family-owned or local chains rather than national, retailers. With a few notable exceptions, the space is provided in relatively older buildings with small floor plates and on small parcels. By way of example, the average size of the approximately 160 privately owned parcels in the City's Downtown Parking Exempt District (see Chapter 4 for a map) is less than 8,000 square feet. For the most part, the Downtown does not function as a centrally operated retail district and numerous individual property owners maintain and lease to tenants based on their unique circumstances and interests.

The two centrally managed shopping centers in Downtown Napa, Napa Town Center and the adjacent Parkway Plaza appear to be operating at lower levels of success than the larger retail centers elsewhere in the City. The 118,000-square foot Napa Town Center has a variety of retailers including Napa Valley Emporium, Buckhorn Grill, Ben & Jerry's, Gilwoods Restaurant, McCaulou's and the Napa Valley Visitor Center. However, the Center has a number of vacancies and modest foot traffic. The 76,000-square foot Mervyn's building anchors the Parkway Plaza area and will soon be replaced by Kohl's (scheduled to open in September 2009). There is also a relatively small-format Safeway located in the Downtown Planning Area which appears to be performing at acceptable levels; the store recently completed an interior and exterior renovation.

Overall, the Downtown Planning Area contains an estimated 1,094,824 square feet of retail space, an increase of about 8.5 percent since 2001 (see Table 18). The estimated

Downtown Planning Area vacancy rate of almost 6 percent is slightly higher than the Citywide rate of 4.8 percent, and the estimate excludes vacancies in projects currently under construction.² Based on a survey of available retail properties in Downtown Napa, the average asking lease rate is approximately \$2.30 per square foot, which is slightly lower than the Citywide average of \$3.12 per square foot (see Table 19). However, newer properties are achieving lease rates comparable to or slightly higher than the Citywide average, at \$3.25 per square foot.

Entertainment, culinary and other leisure- and/or tourist-oriented establishments appear to be the most successful retail niche in the Downtown. For example, there are numerous upscale and mid-scale restaurants that cater to locals, tourists and business lunch patrons, such as Cole's Chop House, Annalien, Piccolino's, Curbside Café, Uva Trattoria, Azzuro Pizzeria, Neela's, Gilwood's, Ristorante Allegria, Bounty Hunter, Downtown Joe's, General Store, The Border, Zuzu, Elements, Sushi Mambo, Celedon, Ubuntu and Angele. Indeed, the bulk of the approximately 92,675 square feet of new retail developed since 2001 has focused on this niche (see Table 15). Notable examples include the following:

- **Oxbow Public Market:** Opened in 2008, the Oxbow Public Market, which is modeled after the Ferry Building Marketplace in San Francisco, is another highly successful venue. Featuring 25 local food vendors, including Taylor's Refresher and organic farmstands, the Oxbow Public Market continues to attract new vendors, the latest being Kara's Cupcakes, which first opened in San Francisco in 2006.
- **Napa Mill:** The Historic Napa Mill, a National Registered Landmark built in 1884, is located on Main Street, along the Napa River. The renovation of Napa Mill was completed in 2008 and includes approximately 66,000 square feet of entertainment and retail and the 66-room Napa River Inn. Tenants include Sweetie Pie's bakery, SILO'S Jazz Club, Angele and Celedon Restaurants, and Napa General Store.

Retail Market Leakage/Capture Analysis

A retail leakage/capture analysis compares the supply of retail in the City with demand generated by local residents, employees, and business. The spending potential of local residents is based on median household income and the percentage of income spent on various retail categories. The typical spending patterns of local employees and business establishments should also be included in the calculation. These three demand-generators can then be compared with actual retail sales to measure the degree to which retail establishments are capturing local spending potential. A capture rate of less than 100 percent indicates that local residents, employees, and/or businesses purchase a large share of their retail goods outside of the City. Conversely, a capture rate of more than 100 percent indicates that a jurisdiction is relatively successful at capturing locally generated demand as well as sales from sources outside of the City, such as tourists and visitors.

² The vacancy rate does not include vacancies at Napa Town Center because it is difficult to determine the actual amount of vacant square feet from available data.

The City had an estimated retail capture rate of about 100 percent in 2008; the most recent year for which data is available (see Table 20). Specifically, the total spending potential from local sources is estimated at about \$918 million per year (87 percent from households, 8 percent from employees, and 5 percent from businesses) compared to actual sales in 2008 of about \$912 million. In other words, as a whole, local retailers appear to be relatively successful at generating sales levels that are equivalent to the spending potential of local residents, businesses, and workers.

Although useful, the aggregate retail supply and demand analysis described above masks potential leakage or capture patterns within particular retail categories and locations. A more detailed analysis of Citywide and Downtown Planning Area retail sales illustrates that while the City is performing well in certain retail categories it is experiencing leakage in others (see Table 21). For example, it is experiencing modest leakage in the dining, and auto sales / supplies and more significant leakage in home furnishing and appliances (including consumer electronics) categories.

The Downtown Planning Area accounted for about 11 percent of the City's total retail sales in 2008 (see Table 22). As would be expected, eating and drinking places represents the most prominent retail sector accounting for about 30 percent of total Downtown Planning Area sales and 25 percent of total Citywide sales in this category. In other words, Citywide leakage in dining establishments would have been significantly higher if not for the Downtown establishments.

Role of Visitor and Tourist Spending

As noted, the tourism industry is a significant component of the City's economy and is an especially important contributor to the retail sector. Of the nine counties in the Bay Area region, Napa County had the second highest visitor-generated tax receipts per household at \$564 (including spending by over-night and day-trips), second only to San Francisco at \$812 (see Table 23). According to a study conducted by the Napa Valley Conference & Visitors Bureau, Napa is not the primary destination for a large majority of Napa visitors. Most Napa visitors also visit San Francisco and Sonoma County. As such, Napa also benefits from the large number of visitors to the broader San Francisco Bay Area.

Following decades of minimal gains from the overall cache of the Napa Valley as a tourist destination, the Downtown is increasingly becoming a part of the Napa visitor experience. The Wine Train, until recently Copia (The American Center for Wine, Food and the Arts), and a range of new hotels, restaurants, day spas, wine tasting rooms and specialty shopping have all added to this trend. When visiting the wineries in the Napa Valley visitors now often stay and/or visit Downtown Napa.

According to the City's Economic Development Department, Napa County visitors contribute \$265 million annual benefit to the Restaurant/Food industry and \$63 million annual benefit to the local retail industry. Moreover, the 2006 Napa County Visitor Profile Study & Napa County Economic Impact Study, conducted by Purdue University, indicates that most Napa County visitors are mature in age, command higher household incomes than state and national averages and primarily come to Napa for the wineries, culinary attractions, museums, art galleries, and day spas.

Information on historical retail sales in the City further supports the importance of tourist spending on the retail sector. Retail sales in the City decreased from 2000 to 2003 and then increased significantly after 2003 (see Table 24). In other words, as tourism fell after the events of September 11, so did retail sales in Napa. In addition, sales from eating and drinking establishments represented the fastest growing retail category during this period behind service stations (a category boosted by rising gasoline prices). Despite annual fluctuations, the average growth in the City's retail sales from 2000 to 2008 was about .8 percent per year if gasoline sales are excluded (adjusted for inflation) which is slightly less than the annual increase in population and employment.

Market Prospects

The City's success in capturing the retail sales of local residents, employees, and businesses can be largely attributed to a relatively competitive supply of establishments that cater to the daily needs of these consumers and to a lack of viable competition from nearby jurisdictions. However, in recent years the City has also become more successful in capturing demand from a growing regional tourism sector. Given the recent investments in Downtown Napa (e.g., hotel development, Opera House renovation, Oxbow Public Market, Napa Mill, and mixed-use projects) coupled with regional growth in tourism, the Planning Area has established itself within the larger Napa region by providing culinary, specialty, and entertainment oriented offerings that cater to tourists, as well as local residents and businesses.

The current recession has caused significant turbulence in the retail market and created a high degree of uncertainty with regard to tenanting and absorption forecasting. However, fundamental changes in retail also present new opportunities as more competitive retail tenants, concepts, and formats emerge and establish their presence in new locations. Moreover, the Downtown's recent success in cultivating its position in the regional tourism market is likely to be self-fulfilling as the district continues to improve its reputation and range of offerings that cater to this segment.

Office Market

This section assesses market conditions and trends in the Napa Region office market and their implications for future development in the Downtown Planning Area.

Regional Market Overview

The Napa Region is home to an emerging office market that accommodates a growing number of medical, high tech, institutional, and hospitality tenants. As of 2007 there were roughly 2.2 million square feet of office space in the County with a market-wide occupancy rate close to 90 percent. Although still relatively small compared to more urban Bay Area markets (by way of comparison the City of Menlo Park has about 3.9 square feet of office), the sector has continued to expand while vacancy rates have declined, even as other Bay Area markets have faltered. The County experienced almost 800,000 square feet of net absorption since 2000, or an exceptionally high 70 percent increase in occupied square feet (see Table 25) compared to regional and national trends. Meanwhile rents have also increased steadily throughout the region, bucking both national and regional trends.

Although detailed data on the amount of total or occupied office square feet in the City is unavailable, anecdotal information suggests that it accounts for about two-thirds of the County total. The Downtown Planning Area has approximately 763,000 square feet,

and the majority of office space in the City (see Table 18). As noted earlier, while the City of Napa is not a regional employment hub, it does accommodate about half of the jobs in the County and an even higher proportion of white collar and administrative professions. In addition, there are numerous office properties in the City ranging from a large corporate business park to smaller converted residential units.

- Located in the southern part of the City along Napa Valley Highway, the 245 acre Napa Valley Corporate Park is home to some of the County's largest employers with nearly over 170 businesses and 2,230 employees (see Table 26). Many of the businesses are associated with the wine industry, including major manufacturing, warehouse and shipping facilities, printers, and bottle and cork enterprises. Other businesses include food, technology, construction, and general office. The biotech company, Dey Labs, recently announced closure because of consolidation.

Downtown Office Market

Paralleling the rest of the County, the Downtown Napa office market is also relatively strong and growing. With limited available land for building in the business parks and demand growth spurred by the regional economy, there has been increased interest in the Downtown Planning Area. Since 2001, office square feet has increased by roughly 44,000 square feet (see Table 15). In addition, there are plans for an additional 95,000 square feet from projects in various stages of the development pipeline; most of the new office projects are under construction, approximately 91,000 square feet, and will likely be complete this year.

Unlike the City's large office parks, the buildings in the Downtown Planning Area are currently occupied by more locally oriented tenants, such as attorneys, insurance companies, and financial investment offices. Some of the offices on the periphery of Downtown are converted historic residential buildings. Given the average smaller parcel sizes, few larger tenants have sought to locate in the Downtown, although several large public sector tenants (e.g., City and County offices), as well as the local newspaper, continue to maintain a presence in both older and newly developed buildings. In general, Downtown office tenants appear to be willing to pay rents that are slightly above the Citywide average (about \$2.50 per square foot per month compared to the Citywide range from \$1.60 to \$2.25, see Table 19). As would be expected, newer office properties are able to command lease rates that exceed the Citywide average at about \$3.00 per square foot or higher.

The new office projects Downtown have been both single-use and mixed-use buildings. For example, the Zeller Building, constructed in 2008, is a 13,000-square foot retail/office building on First Street. Current tenants include Paul Hansen Insurance, a soon-to-be-open Subway restaurant, and a beauty salon. Meanwhile, the Riverfront mixed-use project has an office component of 33,000 square feet that is anchored by Morgan Stanley. These tenants are consistent with the changing composition of employment growth to include more white collar and administrative professions, as describe earlier.

Development Implications

In the long term, the Downtown appears relatively well-positioned to capture an increasing share of the Napa regions' growing office market, assuming adequate space is available. With the larger City business park approaching buildout and the business

parks just outside of the City catering to a different market segment (e.g., industrial and manufacturing uses), as well as continued employment growth in finance, professional services, health, educational and other white collar professions, the Downtown Planning Area is becoming an increasingly competitive location. In addition, the gradual improvement in level of services, amenities, and built environment offered in the Downtown Planning Area has helped foster a setting that is more attractive to a wide range of business tenants.

Hotel Market

This section evaluates the performance of the regional hotel market based on occupancy rates, room revenues, and new development activity, to assess the prospects for new hotel development in the Downtown Planning Area.

Region Supply Overview

The Napa Region includes a broad range of hotel offerings including high-end resorts, smaller boutiques, and economy-oriented chains. According to a 2008 HVS lodging demand study prepared for the City, the Napa region was served by 149 hotels in 2007 with a total of almost 4,000 rooms (see Table 27). Between 2000 and 2007 the supply of hotels in the region increased by 3.5 percent annually, while the number of rooms increased by 4.3 percent annually. This suggests a gradual maturation of the sector with the region attracting larger hotels and fostering more resort destinations. Hotel growth in the City of Napa has followed a similar if not more accentuated trend. Specifically, the City gained four (4) new hotels in the last 7 years for a total of 506 rooms. In 2000 each hotel had an average of 32 rooms while the two new hotels averaged 127 rooms.

There are five hotels in the Downtown Planning Area, for a total of over 500 hotel rooms (see Table 28). Two of the hotels, AVIA Hotel and the Westin Verasa, represent recently completed projects. There are also a number of hotels and Bed and Breakfast Inns located near but outside Downtown Napa. These hotels include Embassy Suites and Best Western Elm Hotel, among others.

Consistent with recent trends, the new hotel developments in the Planning Area are larger and higher-end, and offer more amenities than the older properties. In addition to the recently completed hotel developments there are plans for a Ritz Carlton just outside of the Planning Area on Silverado Trail. The approved project is expected to include 351 rooms, 15,000 square feet of retail, a 4,700-square foot restaurant, a 20,687-square foot spa, and 52,684 square feet of meeting space.

As would be expected, the room rates for recently completed hotel projects command the highest rates. In addition, the average daily rate of the hotels in the Planning Area is slightly higher than the average daily rate in the Napa Valley, \$220 compared to \$180, respectively (see Table 29). The new Westin Verasa has an average room rate of approximately \$260 per night, which is higher than the Napa Valley and Planning Area averages. New hotel development similar to the Westin Verasa is likely to command comparable rates.

Regional Demand Overview

Hotel demand is driven by tourism, visitation tied to local population (i.e., from friends and relatives), and business travel. In the Napa region lodging demand is primarily

driven by a robust tourist industry linked to wine and leisure travel. The important role of tourism in the Napa region is described in further detail above. Although the tourist market segment is highly dependent on national business cycle trends, the Napa region has proven relatively resilient because of its proximity to the Bay Area, growing appeal and low cost relative to international travel.

Demand generated by the Napa regions' population and employment base has remained relatively modest because of the smaller size of these demand segments. In addition, demand for meeting- and conference-related events has been affected by a relatively limited supply of appropriate facilities. For example, the Napa Valley Exposition represents the only significant amount of conference space in the region that combines a large multi-purpose space with a number of smaller meeting rooms as well as a range of nearby lodging and dining opportunities. Although wineries, the Opera House, the recently refurbished Uptown Theater³, and other venues all provide space that is attractive for various purposes, none of these can function as a "one-stop-shop" serving all the needs of a large, multi-day conference or convention. However, the recently developed and/or approved hotels in the area appear to be offering more services amenities and conference space designed to service this segment.

The overall strength of Napa Valley's lodging market is demonstrated by increasing revenues and a healthy occupancy rate (see Table 29). Occupancy rates fell after 2001, as the events of September 11 resulted in a sharp reduction in tourism. However, the Napa hotel market was able to rebound more quickly than most other hotel markets because of the nature of tourism in Napa. Travel to Napa is typically done via car and automobile travel was less affected by the events of 2001 than air travel. Occupancy rates increased steadily from 2004 to 2006. In addition, hotel occupancy tax income suggests a steady increase in demand (see Table 30). Specifically, the City's hotel occupancy tax has nearly doubled since 2000, growing by more than 10 percent per year, despite a small dip in 2001.

Future Prospects

Over the long term the Napa Region hotel market is likely to remain strong given the area's renowned physical and cultural amenities and proximity to major population centers. However, the actual location and success of future hotel projects will depend on how various public and private sector stakeholders leverage specific opportunities and assets. In recent years the City of Napa and private partners have made some progress toward more successfully cultivating the physical and cultural assets of the region, especially in the Downtown. Fortunately, this type of success can be self-fulfilling as tourist-related amenities and services become more concentrated and synergistic. However, the Downtown is still a long way from reaching its full potential as a prime destination for the entire Napa Region.

Both the City and County have been less successful in harnessing business related travel, in part because of the modest size of this sector and in part because of a shortage of business-oriented facilities and services relative to more mature markets nearby (e.g., San Francisco, Sacramento, and Monterey). However, assuming the region continues to experience healthy employment growth, demand for business related-accommodation will also expand and eventually reach a point where new investment in appropriately

³ The timeframe for opening of the Uptown Theater remains uncertain.

oriented facilities and services is economically viable. The meeting space and other amenities included in the Westin Verasa and the recently approved new Ritz Carlton appear to be a significant step in this direction.

Table 1
Household and Household Incomes, 2000-2030
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Item	2000	2005	2008 ¹	2010	2020	2030	2000-2008		2005-2030	
							#	% Annual	#	% Annual
<u>Households</u>										
Napa County	45,402	49,270	50,590	51,470	55,740	58,640	5,188	1.4%	9,370	0.7%
City of Napa	28,073	29,950	30,682	31,170	33,930	35,770	2,609	1.1%	5,820	0.7%
% of County	62%	61%	61%	61%	61%	61%	--	--	--	--
American Canyon	3,236	4,900	5,296	5,560	6,500	7,080	2,060	6.4%	2,180	1.5%
% of County	7%	10%	10%	11%	12%	12%	--	--	--	--
Calistoga	2,042	2,080	2,098	2,110	2,170	2,210	56	0.3%	130	0.2%
% of County	4%	4%	4%	4%	4%	4%	--	--	--	--
St. Helena	2,381	2,420	2,438	2,450	2,510	2,570	57	0.3%	150	0.2%
% of County	5%	5%	5%	5%	5%	4%	--	--	--	--
Yountville	1,057	1,080	1,116	1,140	1,220	1,270	59	0.7%	190	0.7%
% of County	2%	2%	2%	2%	2%	2%	--	--	--	--
<u>Mean Household Income²</u>										
Napa County	\$85,600	\$85,900	\$88,480	90,200	100,500	111,800	\$2,880	0.4%	\$25,900	1.1%
City of Napa	\$76,200	\$81,800	\$84,800	\$86,800	\$98,600	\$111,800	\$8,600	1.3%	\$30,000	1.3%
% of County	89%	95%	96%	96%	98%	100%	--	--	--	--
<u>Median Household Income^{2,3}</u>										
Napa County ⁴	\$60,796	\$62,544	\$64,758	\$66,234	\$73,797	\$82,095	\$3,962	0.8%	\$19,550	1.1%
City of Napa ⁵	\$57,760	\$58,127	\$61,493	\$63,737	\$72,402	\$82,095	\$3,734	0.8%	\$23,968	1.4%
% of County	95%	93%	95%	96%	98%	100%	--	--	--	--

[1] Estimated assuming constant annual growth between 2005 and 2010.

[2] In 2005\$.

[3] Source: U.S. Census.

[4] Assumes the ratio of median income to mean income remains constant at 72% (average from 2000-2005).

[5] Assumes the ratio of median income to mean income remains constant at 73% (average from 2000-2005).

Sources: Association of Bay Area Governments (ABAG); U.S. Census; Economic & Planning Systems, Inc.

Table 2
Downtown Vicinity Demographic and Employment Summary, 2008
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Item	Amount		Δ or %
	2000	2008	
			<u>Growth</u>
Population (2000)	578	567	(11)
Households (2000)	220	218	(2)
Median Household Income	na	\$41,136	
Employment			<u>% of total</u>
Agriculture / Mining	na	19	0.3%
Construction	na	221	4%
Manufacturing	na	354	6%
TCPU ¹	na	207	4%
Wholesale Trade	na	38	1%
Retail	na	1,543	27%
Finance	na	566	10%
Service	na	1,443	25%
Public Administration	na	<u>1,402</u>	<u>24%</u>
Total Downtown Employment	na	5,793	100%

[1] TCPU stands for transportation, communications, and public utilities.

Sources: Claritas; Economic & Planning Systems, Inc.

Table 3
City of Napa Age Distribution Breakdown
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Area / Age Group	Number of Residents	Percent of Total
<u>Downtown Planning Area¹</u>		
Under 17 years	84	15%
18 to 24 years	67	12%
25 to 34 years	127	22%
35 to 44 years	113	20%
45 to 49 years	49	9%
50 to 59 years	63	11%
60 to 64 years	20	4%
65 to 84 years	36	6%
85 years and over	<u>8</u>	<u>1%</u>
Total	567	100%
<u>City of Napa²</u>		
Under 17 years	17,565	23%
18 to 24 years	7,212	10%
25 to 34 years	10,846	14%
35 to 44 years	10,522	14%
45 to 54 years	10,732	14%
55 to 59 years	4,598	6%
60 to 64 years	3,164	4%
65 to 84 years	8,273	11%
85 years and over	<u>1,892</u>	<u>3%</u>
Total	74,804	100%

[1] Source: Claritas (2008).

[2] Source: 2005-2007 American Community Survey 3-Year Estimates.

Sources: U.S. Census; Claritas; Economic & Planning Systems, Inc.

Table 4
Napa County Employment By Industry, 2000-2008
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Industry	2000		2008		Growth (2000-2008)	
	#	%	#	%	#	% Annual
Natural Resources, Mining & Construction						
Natural Resources & Mining	100	0.2%	100	0.2%	0	0%
Construction	<u>3,500</u>	6.1%	<u>3,900</u>	6.0%	400	1%
Subtotal	<u>3,600</u>	6.3%	<u>4,000</u>	6.2%	400	1%
Manufacturing	10,300	18.0%	11,900	18.3%	1,600	2%
Trade, Transportation & Utilities						
Wholesale Trade	1,300	2.3%	1,700	2.6%	400	3%
Retail Trade	5,800	10.1%	6,100	9.4%	300	1%
Transportation, Warehousing & Utilities	<u>1,100</u>	1.9%	<u>1,700</u>	2.6%	600	6%
Subtotal	<u>8,200</u>	14.3%	<u>9,500</u>	14.6%	1,300	2%
Information	800	1.4%	700	1.1%	(100)	-2%
Financial Activities						
Finance & Insurance	1,300	2.3%	1,600	2.5%	300	3%
Real Estate & Rental & Leasing	<u>1,300</u>	2.3%	<u>1,000</u>	1.5%	(300)	-3%
Subtotal	<u>2,600</u>	4.5%	<u>2,600</u>	4.0%		0%
Professional & Business Services	5,900	10.3%	6,000	9.2%	100	0%
Educational & Health Services						
Educational Services	1,300	2.3%	2,000	3.1%	700	6%
Health Care & Social Assistance	<u>6,000</u>	10.5%	<u>6,200</u>	9.6%	200	0%
Subtotal	<u>7,300</u>	12.8%	<u>8,200</u>	12.6%	900	1%
Leisure & Hospitality						
Arts, Entertainment & Recreation	800	1.4%	900	1.4%	100	1%
Accommodation & Food Services	<u>6,800</u>	11.9%	<u>8,300</u>	12.8%	1,500	3%
Subtotal	<u>7,600</u>	13.3%	<u>9,200</u>	14.2%	1,600	2%
Other Services	1,400	2.4%	2,100	3.2%	700	5%
Government						
Federal Government	500	0.9%	400	0.6%	(100)	-3%
State & Local Government	<u>9,000</u>	15.7%	<u>10,300</u>	15.9%	1,300	2%
Subtotal	<u>9,500</u>	16.6%	<u>10,700</u>	16.5%	1,200	1%
Total Nonfarm	57,200	100.0%	64,900	100.0%	7,700	2%
Total Farm	4,900		4,900		0	0%

Sources: California Employment Development Department (EDD); Economic & Planning Systems, Inc.

Table 5
City of Napa Employment by Industry, 2001-2008
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Industry	2Q 2001	2Q 2008	2001-2008	
			#	% Annual
Agriculture, Forestry, Fishing and Hunting	2,605	2,310	-295	-1.7%
Mining	65	61	-4	-1.0%
Utilities	N/A	N/A	N/A	N/A
Construction	2,825	3,061	236	1.2%
Manufacturing	5,260	4,812	-448	-1.3%
Wholesale Trade	748	1,010	262	4.4%
Retail Trade	4,035	4,413	378	1.3%
Transportation and Warehousing	630	998	368	6.8%
Information	754	561	-193	-4.1%
Finance and Insurance	1,132	1,337	205	2.4%
Real Estate and Rental and Leasing	622	651	29	0.7%
Professional, Scientific, and Technical Services	1,416	1,599	183	1.8%
Management of Companies and Enterprises	189	456	267	13.4%
Administrative and Support and Waste Management	2,259	2,969	710	4.0%
Educational Services	382	591	209	6.4%
Health Care and Social Assistance	4,471	4,882	411	1.3%
Arts, Entertainment, and Recreation	606	627	21	0.5%
Accommodation and Food Services	3,595	4,407	812	3.0%
Other Services (except Public Administration)	1,188	1,723	535	5.5%
Not Classified	N/A	N/A	N/A	N/A
Government	<u>7,145</u>	<u>8,299</u>	<u>1,154</u>	2.2%
Total, All Industries	39,929	44,767	4,838	1.6%

Sources: California Employment Development Department; Economic & Planning Systems, Inc.

Table 6
Largest City and County Employers by Number of Employees, 2007
Downtown Napa Specific Plan: Market Assessment; EPS #18587

City of Napa¹		Napa County²	
Employer Name	Local Jobs	Employer Name	Local Jobs
Regulus	1,800	Napa State Hospital	2,006
County of Napa³	1,288	Napa Valley Unified School District	2,000
Queen of the Valley Hospital	1,200	Cultured Stone Corp	1,500
Dey Labs	1,000	Queen of the Valley Hospital	1,400
City of Napa³	425	County of Napa³	1,288
Napa Valley College	266	St. Helena Hospital	1,000
Marinco	213	Veteran's Home of California	1,000
The Vintage Bank³	180	Foster's Wine Estates Americas	650
Wal-Mart #2925	170	Silverado Country Club	575
The Meritage Resort	163	Dey Labs	547
The Meadows of Napa Valley	150	Napa Valley Community College	525
Kaiser Permanente	146	Trincherro Estates	500
Napa Valley Wine Train³	140	City of Napa³	425
Embassy Suites Hotel/ Rings Restaurant	120	Diageo Chateau & Estate Wine Co.	425
Napa Valley Marriott Hotel & Spa	120	Pacific Union College	330
Napa Valley Register/ Publishing³	110	Constellation Brands, Inc.	290
Community Action of Napa Valley	105	The Doctors Company	280
Clinic Ole	101	Ligouri Associates Inc.	270
McDonald's of Napa Valley	100	Wal-Mart Stores Inc.	244
New Vine Logistics	<u>69</u>	Auberge Du Soleil	<u>225</u>
Total	7,866	Total	15,480

[1] Source: City of Napa

[2] Source: Napa Valley Chamber of Commerce

[3] Located in the Downtown Planning Area.

Sources: City of Napa; Napa Valley Chamber of Commerce; Economic & Planning Systems, Inc.

Table 7
City of Napa Employment Projections, 2000-2030
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Industry	2000	2005	2008 ¹	2010	2020	2030	2000-2008		2008-2030	
							#	% Annual	#	% Annual
Agriculture and Natural Resource	510	540	612	660	750	850	102	2.3%	238	1.5%
Manufacturing, Wholesale, and Transportation	5,100	5,520	5,586	5,630	6,100	6,580	486	1.1%	994	0.7%
Retail	4,640	4,920	5,070	5,170	5,690	6,190	430	1.1%	1,120	0.9%
Finance and Professional Service Jobs	5,350	5,740	5,980	6,140	7,070	7,900	630	1.4%	1,920	1.3%
Health, Educational, and Recreational Service Jobs	12,460	13,230	13,884	14,320	16,410	18,330	1,424	1.4%	4,446	1.3%
Other	<u>5,230</u>	<u>5,520</u>	<u>5,700</u>	<u>5,820</u>	<u>6,430</u>	<u>6,940</u>	<u>470</u>	1.1%	<u>1,240</u>	0.9%
Total	33,290	35,470	36,832	37,740	42,450	46,790	3,542	1.3%	9,958	1.1%

[1] Estimated assuming constant annual growth between 2005 and 2010.

Sources: Association of Bay Area Governments (ABAG); Economic & Planning Systems, Inc.

Table 8
Jobs to Employee and Jobs to Housing Ratios
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Location / Category	Year	
	2001	2008
Napa County		
Jobs	66,300	69,600
Housing Units	49,019	53,950
Employees	70,400	76,300
Jobs to Housing Unit Ratio	1.35	1.29
Jobs to Employees Ratio	0.94	0.91
City of Napa		
Jobs	39,929	44,767
Housing Units	28,065	30,094
Employees	42,000	45,500
Jobs to Housing Unit Ratio	1.42	1.49
Jobs to Employees Ratio	0.95	0.98

Sources: California Employment Development Department (EDD); California Department of Finance (DOF); Economic & Planning Systems, Inc.

Table 9
Journey to Work, 2000
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Item	Amount	%
<u>Napa Residents</u>		
<i>Place of Work</i>		
Napa	17,000	51%
Remainder of County ¹	6,435	19%
St. Helena	1,410	4%
Vallejo	1,020	3%
Yountville	815	2%
Other in County ²	910	3%
Other Outside of County	<u>5,992</u>	<u>18%</u>
<i>Total</i>	33,582	100%
<u>Napa Workers</u>		
<i>Place of Residence</i>		
Napa	17,000	58%
Remainder of County ¹	3,185	11%
Vallejo	2,040	7%
Fairfield	1,050	4%
American Canyon	700	2%
Vacaville	615	2%
Other in County ²	930	3%
Other Outside of County	<u>3,646</u>	<u>13%</u>
<i>Total</i>	29,166	100%

[1] Refers to the unincorporated County.

[2] Refers to other cities in the County.

Sources: U.S. Census and Economic & Planning Systems, Inc.

Table 10
Housing Units: City of Napa, 1995-2008
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Item	1995		2000		2005		2008		1995-2005		2005-2008	
	Amount	% of Total	Total Change	Annual Growth Rate	Total Change	Annual Growth Rate						
Single-Family Units												
Detached	16,509	62%	17,342	62%	17,943	61%	18,172	60%	1,434	0.8%	229	0.4%
Attached	<u>1,783</u>	<u>7%</u>	<u>2,059</u>	<u>7%</u>	<u>2,161</u>	<u>7%</u>	<u>2,426</u>	<u>8%</u>	<u>378</u>	1.9%	<u>265</u>	3.9%
Subtotal	18,292	69%	19,401	70%	20,104	68%	20,598	68%	1,812	0.9%	494	0.8%
Multi-Family Units												
2 to 4	2,523	9%	2,766	10%	2,811	10%	2,866	10%	288	1.1%	55	0.6%
5 Plus	<u>4,335</u>	<u>16%</u>	<u>4,220</u>	<u>15%</u>	<u>5,129</u>	<u>17%</u>	<u>5,241</u>	<u>17%</u>	<u>794</u>	1.7%	<u>112</u>	0.7%
Subtotal	6,858	26%	6,986	25%	7,940	27%	8,107	27%	1,082	1.5%	167	0.7%
Mobile	1,427	5%	1,389	5%	1,389	5%	1,389	5%	(38)	-0.3%	0	0.0%
Total	26,577	100%	27,776	100%	29,433	100%	30,094	100%	2,856	1.0%	661	0.7%
Occupied	25,502	--	26,978	--	28,588	--	29,230	--	3,086	1.1%	642	0.7%
% Vacant	4.0%	--	2.9%	--	2.9%	--	2.9%	--	(1.2)	-3.4%	0.0	0.0%

Sources: California Department of Finance; Economic & Planning Systems, Inc.

Table 11
Planning Area Housing, 2008
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Item	Amount	Percent of Total
Single-Family Units	31	25%
Multifamily Units ¹	<u>94</u>	<u>75%</u>
Total	125	100%

[1] Includes 44 multifamily units in buildings of 2 to 8 units and 50 condominium units in the Riverfront.

Sources: City of Napa Economic Development Department;
Economic & Planning Systems, Inc.

Table 12
Rates of Foreclosure in the Bay Area, as of April 2009
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Location	Current Foreclosure Listings [1] <i>a</i>	Total Units (less Mobile Homes) <i>b</i>	Rate of Foreclosure <i>c = a/b</i>
Solano County	4,252	147,365	2.89%
Contra Costa County	8,707	389,876	2.23%
Alameda County	7,961	562,964	1.41%
Napa County	701	49,969	1.40%
City of Napa	419	28,705	1.46%
94559 [2]	158	8,520	1.53%
Sonoma County	2,411	186,470	1.29%
Santa Clara County	6,734	603,113	1.12%
San Mateo County	2,125	264,702	0.80%
Marin County	637	106,407	0.60%
San Francisco County	<u>1,102</u>	<u>361,217</u>	0.31%
Bay Area Total	35,468	2,729,493	1.30%

[1] Includes default, auction, and real estate owned (REO) listings.

[2] Housing unit information is not available from the Department of Finance (DOF) at the zip code level. Estimates are calculated by applying the ratio of housing units in the zip code in the City of Napa estimated by Claritas to the total number of housing units in the City reported by DOF.

Sources: RealtyTrak.com; California Department of Finance; Claritas; Economic & Planning Systems, Inc.

Table 13
Median Home Prices, 2002-2009
Downtown Napa Specific Plan: Market Assessment; EPS #18587

City	Feb-02	Feb-03	Feb-04	Feb-05	Feb-06	Feb-07	Feb-08	Feb-09	% Δ	
									2002 -09	2007 - 09
City of Napa¹										
Nominal	\$310,000	\$377,500	\$451,000	\$540,000	\$585,000	\$587,500	\$500,000	\$325,000	5%	-45%
Constant 2009 \$ ²	\$360,018	\$424,217	\$505,789	\$596,271	\$627,557	\$610,809	\$505,815	\$325,000	-10%	-47%
Bay Area Counties³										
San Francisco County								\$640,000		
Marin County								\$573,409		
San Mateo County								\$505,250		
Santa Clara County								\$408,750		
<i>Napa County</i>								\$322,500		
Alameda County								\$290,000		
Sonoma County								\$282,000		
Contra Costa County								\$216,500		
Solano County								\$195,000		
Total Bay Area								\$295,000		

[1] Based on data from the California Association of Realtors

[2] Adjusted according to the Consumer Price Index for the San Francisco-Oakland-San Jose, CA metropolitan area.

[3] Based on data from Dataquick.

Sources: California Association of Realtors; Bureau of Labor Statistics; Economic & Planning Systems, Inc.

Table 14
City and County of Napa Apartment Market Indicators
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Item	Rent Per Month ¹					Growth (2004-2008)	
	2004	2005	2006	2007	2008 ²	#	% Annual
<u>Napa County³</u>							
One-Bedroom	\$1,024	\$979	\$998	\$990	\$1,010	(\$14)	-0.3%
Two-Bedroom ⁴	\$1,165	\$1,139	\$1,259	\$1,192	\$1,151	(\$14)	-0.3%
Three-Bedroom	\$1,277	\$1,253	\$1,651	\$1,289	\$1,325	\$48	0.9%
Average Rent (All Units)	\$1,159	\$1,128	\$1,292	\$1,165	\$1,125	(\$34)	-0.7%
Vacancy Rate	5%	5%	5%	2%	2%	(3.1)	--
<u>City of Napa⁵</u>							
Number of Units	3,704	4,083	4,083	4,083	4,083	379	2.5%
Vacancy Rate	3.2%	5.6%	2.8%	2.6%	1.6%	(1.59)	--

[1] In constant 2008\$.

[2] Fourth quarter 2008.

[3] Apartments with 99 units or less.

[4] Average for two-bedroom, one bathroom and two-bedroom, two-bathroom units.

[5] Apartments with over 20 units.

Sources: NAIBT Commercial; City of Napa; Economic & Planning Systems, Inc.

Table 15
Downtown Projects: Recently Completed and New Construction in the Development Pipeline
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Item	Residential (Units)	Office (Sq. Ft.)	Retail (Sq. Ft.)	Hotel (Rooms)	Status
<u>Pipeline</u>					
The Riverfront	50	33,000	42,700	--	Under Construction ¹
Avia Hotel	--	--	12,600	142	Under Construction ¹
Napa Square	--	58,000	8,000	--	Under Construction ¹
Ritz Carlton	--	--	19,700	351	Approved
Nunn Office Building	--	4,468	--	--	Approved
Old Greenwood Inn	--	--	--	10	Approved
<i>Subtotal</i>	<i>50</i>	<i>95,468</i>	<i>83,000</i>	<i>503</i>	
<u>Recently Constructed²</u>					
Herritt Building	--	2,768	--	--	Completed 2001
First Napa Credit Union	--	2,990	--	--	Completed 2001
Blackbird Inn ³	--	--	--	8	Completed 2002
River Terrance Inn	--	--	--	112	Completed 2003
Nomura Mixed Use	1	900	--	--	Completed 2004
Restaurant Budo	--	--	5,700	--	Completed 2004
1030 Seminary	--	6,443	--	--	Completed 2007
Napa Mill ⁴	--	--	39,400	66	Completed 2008
Zeller Building	--	6,650	6,650	--	Completed 2008
Oxbow Public Market	--	--	22,800	--	Completed 2008
Westin Verasa	--	--	4,625	160	Completed 2008
Main Street West	--	24,500	13,500	--	Completed 2008
<i>Subtotal</i>	<i>1</i>	<i>44,251</i>	<i>92,675</i>	<i>346</i>	
Total	51	139,719	175,675	849	

[1] These projects are near completion and are scheduled to be completed in 2009.

[2] Excludes the 92,000 square foot COPIA, constructed in 2002. COPIA has recently filed for bankruptcy and has closed.

[3] Historic building conversion: office to hotel.

[4] Renovation and hotel addition

Sources: City of Napa; Economic & Planning Systems, Inc.

Table 16
Violent Crimes Rates per 100,000 Persons ¹
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Jurisdiction	Selected Years			
	1997	2000	2004	2007
<u>Cities</u>				
<i>City of Napa</i>	358	284	431	377
Concord	683	384	313	400
Fairfield	770	558	726	602
Livermore	214	180	178	205
Pittsburg	571	446	440	399
Pleasanton	82	130	134	92
San Rafael	467	445	345	484
Santa Rosa	502	367	646	490
Vacaville	564	393	347	274
Vallejo	1,463	1,102	462	901
<u>Counties</u>				
Alameda County	972	652	609	823
Contra Costa County	635	474	399	478
Marin County	301	258	197	259
Napa County	321	257	342	341
Solano County	846	631	480	587
Sonoma County	406	294	472	412

[1] Violent crimes defined as crimes against people, including homicide, forcible rape, robbery, and aggravated assault.

Sources: RAND California; Economic & Planning Systems, Inc.

Table 17
City of Napa Shopping Centers
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Name	Location	Gross Leaseable Area (Sq. Ft.)	Anchor(s)	Other Tenants
<u>In Project Area</u>				
Napa Town Center	1260 Napa Town Center	118,000	McCaulou's Department Store	Buckhorn Grill, Piccolino's, Napa Valley Visitor's Center
Parkway Plaza	First and Brown Streets	76,000	Formerly Mervyn's (soon -- to be Kohl's)	
<u>Elsewhere in City</u>				
Bel Aire Plaza	3980 Bel Aire Plaza	150,000	Target, Whole Foods, Trader Joe's	Firewood Café, Peet's Coffee & Tea, Umpqua Bank
The Grape Yard	3200 Jefferson Street	36,300	--	UPS, Pasta Prego
Napa Convenience Center	3191 Jefferson Street	6,208	--	Domino's Pizza, The Undercutters
Napa Premium Outlets	629 Factory Stores Drive	171,000	--	Ann Taylor, Banana Republic, J. Crew, Tommy Hilfiger, Sunglass Hut
Northwood Shopping Center	1312 Trancas Street	120,000	Lucky's, Longs Drugs	Starbucks, Downey Savings, Wendy's, Genova Delicatessen
Riverpark Shopping Center	1525 W. Imola Avenue	132,000	Rite Aid Pharmacy	Fazzerati's Pizza, Subway, Carl's Jr.
Redwood Plaza	3365 Solano Avenue	20,737	Vallergas Market	Round Table Pizza, Creations By You (jewelry store), Bank of Napa
Silverado Plaza	605-699 Trancas Street	85,023	Long's Drugs, Nob Hill Foods	Cold Stone Creamery, Citibank, Starbucks, High Tech Burrito, Washington Mutual
South Napa Marketplace	205 Soscol Avenue	382,264	Target, Raley's Supermarket, Home Depot	IHOP Restaurant, Panda Express, Starbucks, Washington Mutual
Walmart Connection center	681 Lincoln Avenue	104,000	Walmart	Subway, Chevron
Jefferson Square	Jefferson and Trancas Streets	<u>54,000</u>	Safeway, Ross	Starbucks, US Bank, See's Candies
Total		1,455,532		

Sources: Shopping Center Directory; City of Napa; Economic & Planning Systems, Inc.

Table 18
Existing Commercial Space in Planning Area
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Item	Amount
<u>Retail</u>	
Total Sq. Ft. ¹	1,094,824
Vacant Sq. Ft.	63,450
Vacancy Rate	5.8%
Growth Since 2001 (sq. ft.) ²	92,675
% of Total Sq. Ft.	8.5%
<u>Office</u>	
Total Sq. Ft.	763,133
Vacancy Rate ³	5.0%
Growth Since 2001 (sq. ft.) ²	44,251
% of Total Sq. Ft.	5.8%

[1] Excludes hotels and partially completed projects, such as the Riverfront. Including these properties can result in a much higher vacancy rate.

[2] See Table 15.

[3] Given the available properties listed in Table 20, the vacancy rate is approximately 4%. However, based on interviews with local brokers this vacancy rate can be much higher because of the partially completed projects that are not occupied. The 5% estimate excludes these partially built properties. Including these properties can result in a much higher vacancy rate.

Sources: City of Napa Economic Development Department;
Economic & Planning Systems, Inc.

Table 19
Available Commercial Properties in Downtown Napa
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Location	Size (Sq. Ft.)	Lease Rate¹
<u>Retail</u>		
1315 First Street	5,128	\$3.25
1400 First Street	12,606	\$3.25
1201 Imola Avenue	117,586	\$2.00
813 Main Street	3,600	\$5.35
1130 Main Street	1,460	\$2.40
1144 Main Street	1,446	\$2.40
1323 Main Street	3,400	\$3.00
1424 Second Street	1,680	\$2.50
1428 Second Street	2,060	\$2.50
Total/ Weighted Average²	148,966	\$2.27
Citywide Average³		\$3.12
<u>Office</u>		
1400 Clay Street	4,822	\$2.80
1827 Clay Street	3,636	\$2.25
1040 Main Street	3,256	\$2.25 ⁴
1250 Main Street	5,500	\$3.25 ⁵
1600 Main Street	2,350	\$2.13 ⁶
1030 Seminary Street	482	\$3.10 ⁵
1766 Third Street	4,608	\$2.35
1250 Main Street	5,000	\$3.25 ⁴
Total/ Weighted Average²	29,654	\$2.49
Citywide Average³		\$1.60 - \$2.25

[1] Reported as amount per month on a NNN basis, unless otherwise indicated.

[2] Weighted average for NNN leases

[3] Source: Terranomics. NNN lease.

[4] Modified gross lease

[5] Full service lease

[6] Lease type unknown

Sources: City of Napa; Terranomics; Economic & Planning Systems, Inc.

Table 20
Estimated Citywide Retail Market Capture Rate
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Item	Amount	% of Total
Aggregate HH Retail Exps. (\$1,000s)	\$799,213	86.6%
Aggregate Employee Retail Exps. (\$1,000s) ¹	\$77,347	8.4%
Aggregate Business Retail Exps. (\$1,000s) ²	<u>\$46,408</u>	<u>5.0%</u>
Total Aggregate Retail Exps. (\$1,000s)	\$922,968	100.0%
Actual Retail Sales in Napa (\$1,000s) ³	\$911,737	n/a
Excess Capture/ (Leakage) (\$1,000s)	(\$11,231)	n/a
Capture Rate	99%	n/a

[1] Based on 2000 Journey-to-Work data, employee expenditure estimates exclude the 58 percent of Napa jobs filled by Napa residents. The expenditure of residents that live and work in Napa is captured by the estimate of household retail expenditures. Assumes \$20 per day, 5 days per week, 50 weeks per year

[2] Based on IMPLAN average for office and R&D sectors estimated at \$1,260 per employee per year.

[3] Based on 2008 City of Napa Taxable Sales.

Sources: IMPLAN; BLS Expenditure Survey 2005-2006; City of Napa Taxable Sales 2008; Economic & Planning Systems, Inc.

Table 21
Household Citywide Retail Sales and Estimated Demand in Napa
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Retail Category	Average HH	Aggregate HH	Actual Citywide Retail		Actual Planning Area		Excess	Capture
	Retail	Retail Exps.	Sales (\$1,000s)		Retail Sales (\$1,000s)		Capture /	
	Expenditures	(\$1,000s)	#	Per Capita	#	% of City	(Leakage)	Rate
	a	b=a* HHS/1000	c	d	e	f=e/c	g=c-b	h=c/b
Apparel Stores	\$1,768	\$52,960	\$71,311	\$0.89	\$2,755	3.9%	\$18,351	135%
General Merchandise Stores	\$2,062	\$61,752	\$133,718	\$1.67	\$9,412	7.0%	\$71,966	217%
Food Stores ¹	\$4,075	\$122,042	\$224,513	\$2.80	\$20,009	8.9%	\$102,472	184%
Eating and Drinking Places	\$5,136	\$153,823	\$144,925	\$1.81	\$34,948	24.1%	(\$8,899)	94%
Home Furnishings and Appliances	\$856	\$25,627	\$19,325	\$0.24	\$2,594	13.4%	(\$6,302)	75%
Building Materials and Farm Implements	\$1,691	\$50,652	\$132,009	\$1.64	\$12,079	9.2%	\$81,357	261%
Auto Dealers and Auto Supplies	\$4,785	\$143,311	\$131,489	\$1.64	\$30,582	23.3%	(\$11,822)	92%
Service Stations	\$2,918	\$87,406	\$134,157	\$1.67	--	--	\$46,750	153%
Other Retail Stores ²	<u>\$3,394</u>	<u>\$101,640</u>	<u>\$129,498</u>	<u>\$1.61</u>	<u>\$10,138</u>	7.8%	<u>\$27,858</u>	127%
Total	\$26,685	\$799,213	\$1,120,944	\$13.96	\$122,517	10.9%	\$321,731	140%

[1] Typically, only 35% of grocery purchases are taxable. SBE sales tax has been adjusted to reflect total retail sales.

[2] Includes specialty stores; packaged liquor stores; second-hand merchandise; fuel and ice dealers; mobile homes, trailers, campers; boat, motorcycle, and plane dealers; and business and personal services.

Sources: BLS Expenditure Survey 2005-2006, City of Napa Taxable Sales 2008, Economic & Planning Systems, Inc.

Table 22
Planning Area Taxable Sales¹
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Category	2008
Apparel Stores	\$2,755
General Merchandise Stores	\$9,412
Food Stores	\$7,003
Eating and Drinking Places	\$34,948
Home Furnishings and Appliances	\$2,594
Building Materials and Farm Implements	\$12,079
Auto Dealers and Auto Supplies	\$30,582
Service Stations	--
Other Retail Stores	<u>\$10,138</u>
 Total	 \$109,511
 Percentage of Citywide Sales	 11%

[1] Shown in thousands of dollars.

Sources: City of Napa Economic Development Department;
Economic & Planning Systems, Inc.

Table 23
Visitor-Generated Tax Receipts by County
Downtown Napa Specific Plan: Market Assessment; EPS #18587

County	2006 Receipts (in millions)	Receipts per Household	% of California Receipts
San Francisco	\$256.5	\$812	12.6%
Napa	\$27.5	\$564	1.3%
San Mateo	\$60.7	\$239	3.0%
Santa Clara	\$91.4	\$157	4.5%
Sonoma	\$26.2	\$149	1.3%
Alameda	\$68.8	\$130	3.4%
Marin	\$10.2	\$101	0.5%
Contra Costa	\$23.9	\$64	1.2%
Solano	<u>\$6.7</u>	\$49	<u>0.3%</u>
<i>Bay Area Total</i>	\$571.9	--	28.0%
California	\$2,042.9	\$165	100.0%

Sources: California Travel Impacts by County, 1992-2006 by: Dean Runyan Associates, Inc.; Economic & Planning Systems, Inc.

Table 24
City of Napa Taxable Sales, 2000-2008 (2008\$)
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Category	Year									Growth (2000-2008)	
	2000	2001	2002	2003	2004	2005	2006	2007	2008	#	% Annual
Apparel Stores	55,693	50,297	47,844	46,687	49,896	57,397	59,317	58,456	71,311	15,618	3.1%
General Merchandise Stores	132,347	149,817	149,442	147,055	152,571	160,263	158,740	157,180	133,718	1,370	0.1%
Food Stores	84,695	81,029	82,048	71,098	78,689	75,961	74,704	74,223	78,580	(6,115)	-0.9%
Eating and Drinking Places	93,586	98,972	103,965	108,586	117,344	123,188	125,991	130,453	144,925	51,339	5.6%
Home Furnishings and Appliances	29,140	28,629	25,999	24,406	25,489	25,861	24,233	24,327	19,325	(9,815)	-5.0%
Building Materials and Farm Implements	120,637	115,156	117,261	118,045	144,881	139,593	136,381	121,274	132,009	11,372	1.1%
Auto Dealers and Auto Supplies	153,913	143,941	141,166	138,579	138,092	135,658	137,692	142,502	131,489	(22,424)	-1.9%
Service Stations	67,362	66,362	59,269	69,303	74,969	81,478	91,370	104,294	134,157	66,795	9.0%
Other Retail Stores	<u>117,926</u>	<u>108,398</u>	<u>111,244</u>	<u>111,133</u>	<u>106,877</u>	<u>112,340</u>	<u>116,403</u>	<u>113,189</u>	<u>129,498</u>	<u>11,572</u>	<u>1.2%</u>
Total	855,298	842,601	838,238	834,892	888,808	911,737	924,829	925,896	975,010	119,712	1.7%
Total w/o Service Stations	787,936	776,239	778,969	765,589	813,839	830,259	833,460	821,603	840,853	33,667	0.8%

Shown in thousands of 2008 dollars.

Sources: California State Board of Equalization (SBE); Economic & Planning Systems, Inc.

Table 25
Napa County Office Market Indicators
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Item	Year								Growth (2000-2007)	
	2000	2001	2002	2003	2004	2005	2006	2007	#	%
Total Square Feet	1,428,610	1,581,538	1,673,481	1,836,663	1,988,480	2,107,038	2,137,378	2,201,071	772,461	6.4%
Existing Vacancy	265,559	307,064	264,524	384,022	378,559	398,418	267,881	243,504	(22,055)	-1.2%
Vacancy Rate	18.6%	19.4%	6.4% ¹	12.3% ¹	11.1% ¹	11.4% ¹	12.5%	11.1%	-7.5%	-7.1%
Net New Construction		152,928	91,943	163,182	151,817	118,558	30,340	63,693	772,461	
Absorption		111,423	134,483	43,684	157,280	98,699	160,877	88,070	794,516	

[1] Excludes one special use 158,000 square foot building.

68%

Sources: Keegan & Coppin Co., Inc./ONCOR International; Economic & Planning Systems, Inc.

Table 26
City of Napa Business Parks (as of Spring 2009)
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Business Park/ Tenants	Size (Acres)	# of Tenants¹	Local Jobs
Napa Valley Corporate Park	244	172	2,234
Marine Industries Company LLC			
Meritage Resort			
Regulus Integrated Solutions			
United Parcel Service			
Winetech LLC			

[1] Number of businesses with active business licenses on file.

Source: City of Napa Economic Development Department;
Economic & Planning Systems, Inc.

Table 27
Hotel Inventory, 2000-2007
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Item	Year		Growth (2000-2007)	
	2000	2007	#	%
<u>Napa Valley</u>				
Hotels	117	149	32	3.5%
Guestrooms	2,957	3,979	1,022	4.3%
Avg. Rooms per Hotel	25	27	--	--
<u>City of Napa</u>				
Hotels ¹	35	39	4	1.6%
% of Napa Valley	29.9%	26.2%	--	--
Guestrooms	1,132	1,638	506	5.4%
% of Napa Valley	38.3%	41.2%	--	--
Avg. Rooms per Hotel	32	42	--	--

[1] Includes River Terrace Inn, Meritage, Hilton Garden Inn, and Westin Verasa (under construction though not complete in 2007).

Sources: HVS Consulting and Valuation; City of Napa; Economic & Planning Systems, Inc.

Table 28
Hotels in the Planning Area
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Property	# of Rooms	Average Daily Rate				Average
		In-Season Weekday	In-Season Weekend	Off-Season Weekday	Off-Season Weekend	
AVIA Hotel ¹	141	\$249	\$299	\$169	\$169	\$222
Napa River Inn	66	\$219	\$329	\$169	\$239	\$239
River Terrace Inn	112	\$249	\$319	\$164	\$239	\$243
Westin Verasa	160	\$259	\$290	\$239	\$269	\$264
Napa Valley Travelodge	45	\$112	\$160	\$112	\$160	\$136
Total/ Average (excluding AVIA Hotel)	383					\$221
Total/ Average (including AVIA Hotel)	524					\$221

[1] Opens Summer 2009

Sources: Respective hotels; Economic & Planning Systems, Inc.

Table 29
Napa Valley Hotel Market Trends
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Item	Year										
	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Occupancy	77.2%	79.2%	74.6%	77.8%	81.0%	66.3%	70.4%	69.8%	64.6%	67.1%	68.2%
Average Daily Rate	\$120.80	\$132.46	\$146.96	\$153.91	\$164.42	\$158.19	\$155.01	\$153.27	\$153.42	\$169.00	\$178.34
Revenue / Room	\$93.22	\$104.89	\$109.64	\$119.79	\$133.16	\$104.90	\$109.14	\$16.91	\$99.17	\$113.45	\$121.70

Sources: Smith Travel Research; Economic & Planning Systems, Inc.

Table 30
Transient Occupancy Tax (TOT) Revenue FY00/01 to FY07/08
Downtown Napa Specific Plan: Market Assessment; EPS #18587

Item	Amount by Fiscal Year								Growth (FY00/01-FY07/08)		
	FY00/01	FY01/02	FY02/03	FY03/04	FY04/05	FY05/06	FY06/07	FY07/08	#	%	Annual %
Revenue	\$4,386,482	\$4,268,884	\$4,753,655	\$5,121,750	\$5,694,979	\$6,233,067	\$7,737,905	\$8,715,650	\$4,329,168	98.7%	10.3%
% Change from Prior Year	--	-2.7%	11.4%	7.7%	11.2%	9.4%	24.1%	12.6%	--	--	--

Sources: City of Napa Economic Development Department; Economic & Planning Systems, Inc.

IV. Circulation and Parking

This chapter summarizes current transportation and parking conditions in the Planning Area. It also includes a summary of existing circulation policies and existing vehicular, transit, pedestrian, bicycle and rail systems. It further describes parking regulations and existing parking supply and demand

Key Findings

Pedestrian and Bicycle Travel

- The Downtown, in general, has a robust walkable environment primarily based on its pedestrian-scaled historic grid and urban design features. There are some barriers to pedestrian circulation and access such as the Napa River, rail crossings, high volume streets with wide crossings such as Soscol Avenue, and to some extent the merging of city blocks for large developments.
- Sidewalks or pedestrian paths exist along nearly all of the roadways within the Planning Area. Crossings are marked at signalized and unsignalized intersections and are relatively short.
- Downtown Napa has a moderately robust network of bicycle facilities offering different facility types for different experience levels of bicyclists. The Downtown does lack an east-west Class II system that might logically occur on Third Street, and lacks the continuation of Class II bike lanes north-south through the midtown area. The existing bicycle boulevard provides an alternative to this missing Class II corridor.

Transit Travel

- Napa transit service is provided by the VINE, the Napa Downtown Trolley (which is being discontinued in the near future) and miscellaneous paratransit services, all of which are operated by the Napa County Transportation and Planning Agency (NCTPA). Downtown Napa is densely served by transit routes partly due to downtown destinations and partly due to the existence of the Pearl Street Transit Center. With the planned relocation of the transit center to east of the River adjacent to the railroad, the current transit density could decrease. Furthermore, the discontinuation of the downtown trolley service will eliminate a convenient inter-downtown mode of transportation. Many of the trolley's destinations can be reached by walking, but its discontinuation could increase automobile travel for short trips within the downtown.
- When eventually relocated, the existing transit center should be replaced with transit stops, and non-motorized access to the new transit center should be direct and clearly identified.
- There is no commuter rail system operating in Napa; the Napa Valley Wine Train, a privately operated service, passes through the Planning Area and has its main station located near the intersection of Soscol Avenue / First Street

Existing Traffic Conditions

- Traffic counts are being conducted in the summer of 2009 to reflect current peak conditions in the Downtown Planning Area.

Existing Parking Conditions

- There has been a substantial (18%) increase in overall parking in the Downtown Planning Area since 2002 primarily due to construction of the new Fifth Street parking garage and the Third Street County lot. On-street parking counts are reduced from the 2002 Study due to some permanent losses, 2002 overcounts and other unknown reasons.
- There is a more than adequate number of parking spaces within the study area to accommodate current demands based on the current levels of occupancy in the Downtown Planning Area. However, it is important to note that the current parking demand does not reflect demand from newly constructed, but not yet occupied development.
- With the Fifth Street garage open and building vacancies, the three other garages remain under 60 percent occupancy.
- The new Fifth Street garage has shifted at least 220 parked cars from on and off street public facilities in the study area. Vacancies and depressed economy are also expected to have reduced demand on a typical weekday. Overall, public parking is 50-60 percent occupied. This lower occupancy is likely due to the facts that the 2009 parking survey was taken in March (off peak season); slow economic conditions, and because there is new, excess capacity in the new Fifth Street garage. Future analysis will be adjusted for new development and proposed Specific Plan development.
- Loss of parking due to the Flood Project in the vicinity of the Cinedome will need to be replaced.

Existing Transportation Policy Context

City of Napa General Plan Transportation Goals and Policies

The three major transportation objectives of the City of Napa General Plan Transportation Element (2007) are to “Develop a transportation infrastructure that provides for an acceptable traffic flow and provides access to all destinations”, “Create a city-wide transportation system that allows users to choose from a variety of safe transportation options including an adequate system of streets, transit, pedestrian and bicycle facilities” and “Minimize the negative effects of additional automobile traffic and other transportation.” The City’s General Plan goals and policies further articulate how how transportation planning is approached for the Planning Area.

Goal T-1: To provide for extension and improvement of the City’s roadway system to ensure the safe and efficient movement of people and goods.

Goal T-2: To maintain an adequate road system that is attractive and provides for efficient movement of people, goods, and services within the City, and adequate connections to the region and state.

- Policy T-2.1: The City shall ensure that traffic levels of service (LOS) will not exceed midrange LOS D at all signalized intersections on arterial and collector streets with the following exceptions, where midrange LOS E will be permitted:

- a. Downtown Napa within the area bounded by Soscol Avenue, First Street, California Boulevard and Third Street;
 - b. Jefferson Street between Third Street and Old Sonoma Road; and
 - c. Silverado Trail between Soscol Avenue and First Street.
- Policy T-2.2: The City shall ensure that all new development and redevelopment will meet adopted service levels (LOS) for transportation facilities unless findings are made that achieving other specific public goals found in this General Plan outweigh this requirement.
 - Policy T-2.4: When reviewing projects, the City shall monitor stop controlled intersections using LOS and the Highway Capacity Manual criterion as a guideline, applying CALTRANS signal warrant evaluation as indicated, and requiring mitigation as necessary.
 - Policy T-2.7: The City shall restudy the access to and circulation in the Downtown area to determine the optimum solution to vehicle circulation that will coordinate with Downtown improvement projects while providing for the circulation needs of the local citizen as well as the visitor.

Goal T-3: To maintain acceptable traffic flow along Napa’s crucial corridors.

Goal T-4: To protect residential neighborhoods from high-volume and high-speed traffic and its effects.

Goal T-5: To develop and maintain an efficient and convenient transit system providing alternatives to the use of the personal automobile to residents, workers, and visitors within the City, with connections to Napa County and the region.

Goal T-6: To develop and maintain a safe, integrated bicycle route network for residents and visitors, connecting key destinations to neighborhoods, neighborhoods to each other, and the City of Napa to the county

- Policy T-6.2: The City shall apply for funding to undertake bicycle network route improvements that include the following components:
 - a. Connections to employment centers and shopping areas: downtown, corporate park, Transcas, State Hospital.
- Policy T-6.6: The City shall consider innovative ways of encouraging bicycle use on a few key through streets that are normally too narrow (in part or in whole) to safely accommodate bicycles.
- Policy T-6.7: The City shall incorporate designs to support bicycle operating characteristics in intersections and traffic control systems.
- **Policy T-6.8: The City shall provide for bicycle storage and access in future development.**
- **Policy T-6.9: The City shall promote bicycle access in the site planning and design of all residential subdivisions over 20 units, and of all commercial or industrial projects over 20,000 square feet.**

Goal T-7: To develop and maintain bicycle support facilities in appropriate locations to encourage the use of bicycle travel in Napa.

Goal T-8: To improve bicycle safety in promoting the use of bicycle travel in the City.

Goal T-9: To provide an interconnected pedestrian network providing safe access between residential areas, public uses, shopping, and employment centers, with special attention to a high quality Downtown pedestrian environment with links to neighborhoods.

- Policy T9.4: The City shall connect the city's major planned trails (as identified in Chapter 5, Parks and Recreation), to the proposed regional Ridge and Bay Trails, connecting all of these major pedestrian and bicycle routes to downtown.
- Policy T-9.5: The City shall maintain a pedestrian-oriented downtown area, with retail uses oriented to the sidewalk.

Goal T-10: To provide convenient access for residents and businesses to a variety of modes of transportation.

Additional Goals and Policies

Some of the other chapters in the General Plan include references to the transportation element, which are listed below.

- Land Use – LU-6.6: The City shall enhance public access to the downtown, including a stronger link to downtown residential neighborhoods, through improvements to directional signs, roads, transit, and pedestrian and bike trails along streets and the river.
- **Parks and Recreation -- PR-6.4** The City shall link the Napa River Trail to other trails, parklands and community resources including downtown and river-oriented businesses.

Goal T-10: To provide convenient access for residents and businesses to a variety of modes of transportation.

California Department of Transportation (Caltrans)

Caltrans builds, operates, and maintains the State Highway system, including the Interstate Highway system. Caltrans' mission is to improve mobility statewide. The department operates under strategic goals to provide a safe transportation system, optimize throughput and ensure reliable travel times, improve the delivery of state highway projects, provide transportation choices, and improve and enhance the states investments and resources. Caltrans controls the planning of the state highway system and accessibility to the system. Caltrans establishes LOS goals for highways and works with local and regional agencies to assess impacts and develop funding sources for improvements to the State Highway system. Caltrans requires encroachment permits from agencies or new development before any construction work may be undertaken within the state's right-of-way. For projects that would impact traffic flow and levels of services on state highways, Caltrans would recommend measures to mitigate the traffic impacts.

While there are no state highways within the study area, access to the downtown study area is provided by State Highway 121 (Silverado Trail) and Highway 29.

Napa County Public Works Department

The Napa County Public Works Department is responsible for capital facility planning and maintaining roads, bridges and related facilities within the unincorporated area of the County.

Napa County Transportation and Planning Agency (NCTPA)

The NCTPA is an independent agency of local officials who serve as the countywide transportation planning agency. The NCTPA operates the VINE, the Napa area's bus system, and oversees the planning and funding of paratransit (transportation for special needs and disabled riders), the maintenance and improvement of highways, streets and roads, and bicycle transit.

Association of Bay Area Governments (ABAG)

ABAG was established to conduct planning and study of regional land use, transportation, and economic issues of concern to the Counties and Cities in the San Francisco Bay region. The 101 cities and all nine counties (Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma) within the Bay Area are voluntary members of ABAG. In addition to its transportation planning and study functions, and policy recommendations, ABAG develops and maintains a regional travel demand forecasting model used for the planning of regional transportation facilities and the assessment of development proposals.

Existing Transportation Assessment***Existing Roadway System******Street Classifications***

The existing circulation network within the Planning Area is composed of state highways, arterials, collectors and local streets. The City of Napa General Plan (1998) provides the definitions below for street classifications, which govern engineering design standards and the roadway level of service thresholds.

STATE HIGHWAYS. State Highways provide for intra- and inter-regional mobility with direct access to abutting parcels. There is no access restriction and typical daily volume and right-of-way vary between urban and rural areas.

ARTERIALS (MAJOR/MINOR). Arterials collect and distribute traffic from freeways to collector streets and vice versa. Major Arterials consist of four to six lanes and provide for a left-turn median within an 84- to 128-foot right-of-way. Minor arterials have two travel lanes. The optimum minimum distance between intersections is approximately one half mile and driveways to major traffic generators may be permitted within the half mile spacing. Arterial streets may carry daily volumes of up to 40,000 vehicles per day.

COLLECTORS. Collectors serve as connectors between local and arterial streets. They provide direct access to parcels and consist of two lanes of traffic, usually without a left turn median on rights-of-way between 60 and 84 feet. At major intersections, driveways on collector streets should be no closer than 50 feet to the intersection. Non-residential driveways and/or intersecting streets should be no closer than 300 to 400 feet apart. Collectors typically carry up to 12,000 vehicles per day.

LOCAL STREETS. Local streets provide access to parcels with little access restriction. They consist of two travel lanes within right-of-ways of up to 56 feet and may carry up to 5,000 vehicles per day. Local streets constitute the largest part of the city's circulation system.

Downtown Napa Planning Area Circulation System

The Planning Area circulation system is comprised of arterials, collectors and local streets. The Planning Area is generally bounded by Caymus Street to the north, Division Street to the south, Jefferson Street to the west and Soscol Avenue to the east. First Street, First Street, Soscol Avenue and Jefferson Street serve as primary access points to the study area, while state highways, such as State Route 12 (SR-12), SR-29 SR-121 and SR-221 provide regional connections between Downtown and the greater Napa County area.

The existing vehicular circulation system within the Planning Area is shown in **Figure 4.1** and described below:

State Highways

The following state highways do not traverse directly through the Planning Area; however, they are identified below as they serve as important regional connections to the Downtown area:

SR-29 is a four-lane, median-divided state highway that primarily runs north-south connecting Napa to regional destinations such as Vallejo to the south and Calistoga and St. Helena to the north. SR-29 is located west of Downtown Napa, and can be accessed via the First Street interchange.

SR-121 is a two- to four-lane state highway that runs primarily north-south, extending from Sonoma County in the southwest, north through the City of Napa, then northeast beyond the Napa city limits. SR-121 is located to the east of the Planning Area where the facility is also referred to as the Silverado Trail.

SR-221/Napa-Vallejo Highway (SR-221) is a north-south state highway that becomes SR-121/Soscol Avenue at its intersection with Imola Avenue. There are two lanes in each direction divided by a raised median.

Arterials

First Street is a two-lane, undivided east-west arterial that runs from Browns Valley Road to its terminus just east of Silverado Trail. In the Downtown area, between Main Street and California Boulevard, First Street is one-way in the westbound direction, forming a one-way couplet with the corresponding eastbound segment of Second Street.

Second Street is a two-lane, east-west arterial that extends from California Boulevard to Main Street. Second Street is a one-way roadway running in the eastbound direction, forming a one-way couplet with the corresponding westbound segment of First Street.

Third Street is a two-lane, east-west arterial roadway that extends from California Boulevard to Coombsville Road. Within the Planning Area, Third Street is one-way in the westbound direction between Coombs Street and Church Street, forming a one-way couplet with the corresponding eastbound segment of Fourth Street.

Fourth Street is a two-lane east-west arterial that extends approximately four city blocks from Third Street to Coombs Street. Fourth Street is one-way in the eastbound direction, forming a one-way couplet with the corresponding westbound segment of Third Street.

Coombs Street is a two-lane, north-south roadway that is discontinuous between First Street and Pearl Street. The southern segment extends from Imola Avenue to First Street and operates as a collector. The northern segment extends from Pearl Street north to Clinton Street and operates as a local street.

Main Street is a two-lane arterial that runs north-south from Fifth Street to Pueblo Avenue. North of Pearl it is designated as a collector

Soscol Avenue extends from Trancas Street to Imola Avenue and is a four-lane, north-south arterial roadway within the Planning Area. There is a raised median between Maplewood Avenue (just north of Lincoln Avenue) and the Soscol railroad crossing. South of the Planning Area where the Silverado Trail merges with Soscol Avenue to Imola Avenue, Soscol Avenue is also referred to as SR-221.

Silverado Trail (SR-121) is a 2 lane highway located to the east of the Planning Area and serves as an important regional connection to the greater Downtown area.

Collectors

Seminary Street is a two-lane, north-south roadway that extends from Pine Street to Hayes Street. The segment between Third Street and Calistoga Street is classified as a collector street, while the remaining segments are classified as local streets.

Franklin Street is a two-lane, north-south roadway that runs from Coombs Street to Pearl Street. Third and is classified as a collector.

Yajome Street is a two-lane collector that runs north-south from First Street to Lincoln Avenue.

Pearl Street is a two-lane, east-west collector that connects Franklin Street to Soscol Avenue. Pearl Street crosses the Napa Creek just east of Coombs Street. Local Streets

Several local streets complete the partial grid network of the Downtown circulation system. These streets are not described in detail in this study; however, they are shown in **Figure 4.1**.

Crucial Corridors

The City of Napa General Plan identifies several routes that serve a particularly vital role in communitywide circulation and in providing accessibility to key community facilities as Crucial Corridors. The City's key circulation policies in its traffic management strategy have been established to reserve traffic capacity within these major corridors for community-wide circulation. In general, Crucial Corridor Policies limit additional driveways to these streets and discourage high traffic generating uses.

The following roads have been designated as Crucial Corridors: Soscol Avenue; Silverado Trail from Soscol Avenue to Trancas Street (see **Figure 4.1**).

Truck Routes

The City General Plan has designated truck routes that include the following roads in and near Planning Area: Soscol Avenue from Imola Avenue to Trancas Street; Third Street from Soscol Avenue to Silverado Trail; Coombsville Road east of Silverado Trail. **Figure 4.1** shows the truck routes within and near the Planning Area.

Existing Bicycle and Pedestrian System

Pedestrian Circulation

A key transportation feature of any downtown is a robust pedestrian circulation system. This is comprised of a system of small, or pedestrian-scaled, blocks with a continuous system of sidewalks, short crossings at all intersections, and the absence of major barriers to pedestrian travel. Major barriers may include physical features such as rivers or topography, or may include wide streets or freeways. Downtown Napa provides the key features that make up a robust pedestrian system, but also contains some barriers.

There are currently sidewalks or pedestrian paths along nearly all of the roadways within the Planning Area. All of the intersections are either stop or signal controlled allowing for pedestrian crossing. At stop controlled intersections, painted crosswalks are usually provided at adjacent intersections. At signalized intersections, crosswalks and pedestrian signals are provided. Sidewalk bulbouts are provided at several intersections. Bulbouts are curb extensions where the curb widens into the street, which effectively narrows the roadway width and provides a shorter distance for pedestrian crossings. Even at intersections without bulbouts, for the most part, pedestrian crossings are short (less than 60 feet). Painted pedestrian crosswalks are provided at each leg of the study intersections

Barriers to pedestrian circulation in the Planning Area include the Napa River, the rail line running alongside Soscol Avenue, and high vehicular volume streets including Soscol Avenue and Third Street. Crossings of the Napa River are concentrated in the First and Third Street corridors, so north and south of these corridors there are significant gaps between crossings. However, the First Street and Third Street Bridges over the Napa River connect the two most important subareas of the Downtown Specific Plan study area; the downtown core and the Oxbow area. The Soscol Avenue intersections at both First and Third Streets, with their wide crossings with high traffic volumes, an adjacent rail line and lack of pedestrian-orientated land uses, comprise the greater pedestrian barriers.

Planned trails in the Oxbow Commons Bypass will provide an alternative pedestrian/bicycle connection under Soscol Avenue from the Oxbow area to First Street in the Downtown core. The planned River Trail will also provide an attractive north-south transportation route through the study area, as well as a recreational facility.

The Third Street corridor is less of a barrier due to its short blocks, relatively short signalized crossings, and strong pedestrian-orientation of the adjacent land uses throughout most of its length.

An additional barrier to pedestrian travel is the past practice of aggregating smaller blocks to create single large development project such as the Napa Town Center. While the shopping center itself provides a pleasant and attractive walking environment for customers, it makes it difficult for visitors to circulate (by any mode) through or around the development by breaking up the intuitive nature of the historic street grid.

Bicycle Circulation

The City of Napa bicycle network extends throughout the City, with many routes traveling directly through the Planning Area. The City has level terrain and a variety of scenic bicycle routes. The City's General Plan classifies bikeways according to the California Department of Transportation (Caltrans) classification as follows:

- Class I Bikeways (Bike Path or Trail): Dedicated bike path which is separated from motorists by a space or physical barrier, or is on a separate right-of-way.
- Class II Bikeways (Bike Lane): Bike lane on a roadway with restricted right-of-way, designated by signs and pavement marking for the use of bicycles.
- Class III Bikeways (Bike Routes): Bike route with shared right-of-way designated by signs on roadways.

Figure 4.2 shows the existing Napa bicycle and pedestrian system.

Currently, there are limited existing Class I bikeways serving the Planning Area. Existing multi use paths exist on portions of the Napa River (one segment is found along the riverfront promenade from Fifth to First Streets; and the other along the River in the Oxbow area behind Copia and the new hotels.) The City of Napa Future Bikeway System shows proposed Class I bike paths east of Downtown along the Napa River (the Napa River Trail), as well as adjacent to the existing Railroad line from Vallejo Street north to Trancas Street. There is a planned multi-use path connection through the flood control project's Oxbow Commons bypass channel, connecting the trail around the Oxbow to the downtown at about First Street. The Napa River Trail will also provide connections to regional facilities including the Bay Trail and Ridge Trail.

Class II Bikeways currently exist along Soscol Avenue, 3rd Street and Coombsville Road. Class III Bikeways are located along Coombs Street, Jefferson Street, Franklin Street, Soscol Avenue, First Street and Second Street. Class II bike lanes are the one type of facility lacking in the downtown, both north-south and east-west. The downtown is served by one north-south Class II corridor (Soscol Avenue) and good connections both existing and planned to the east along Third Street, Silverado Trail, East Avenue and Coombsville Road. There are planned Class II lanes on Jefferson and Franklin Streets approaching the downtown from the south, but terminate at Third Street. Logically,

Third Avenue would provide an east-west Class II connection, and Coombs, Jefferson or Franklin Streets would provide a logical north-south connection. These streets have limited width to provide Class II bike lanes. The Seminary Bicycle Boulevard and Class III routes provide alternative corridors for north-south travel.

The City of Napa General Plan (2007) identifies a city policy to study the feasibility of establishing Bicycle Boulevards in the City of Napa. Bicycle Boulevards are enhanced Class III bike routes with shared right-of-way designated by more pavement legends and road signs. To date, the City has established Bicycle Boulevards on Seminary Street, Oak Street, Hayes Street and Franklin Street.

Existing Transit System

Napa Public Transit System

Napa transit service is provided by the VINE and miscellaneous paratransit services, all of which are operated by the Napa County Transportation and Planning Agency (NCTPA). **Figure 4.3** shows the existing public transit routes and location of bus stops within the downtown Planning Area, which are also described below. A Napa Downtown Trolley is being discontinued at the end of June, 2009.

The Pearl Street Transit Center, located at the southeast corner of the Coombs Street / Pearl Street intersection, is the key transit stop and transfer location for local and regional bus routes. As a result of circulation changes created by the Flood Project, and to provide an adequate site, NCTPA plans to relocate the Pearl Street Transit Center to a location east of Soscol Avenue adjacent to the rail line. The primary future location is between Sixth Street and Fourth Street, but NCTPA is also exploring an option near the Wine Train within the Planning Area.

The VINE

The VINE serves the cities of Napa, Santa Rosa, Calistoga, St. Helena, Rutherford, Oakville, Yountville, American Canyon, and Vallejo. Within the Planning Area, there are currently eleven (11) bus routes; nine (9) local routes and two (2) regional routes with service between 5:20 AM and 9:25 PM. All eleven routes stop at the Pearl Street Transit Center.

The VINE runs nine local routes to the Planning Area as listed below:

- Route 1A - Old Sonoma/Brown's Valley: Pearl Street Transit Center, Premium Outlets, and the County Health Department are serviced by this route. Buses usually operate on 60-minute headways.
- Route 1B - Brown's Valley/Old Sonoma: Pearl Street Transit Center, Premium Outlets, and the County Health Department are serviced by this route. Buses usually operate on 60-minute headways.
- Route 2 - Coombs/Shetler: Pearl Street Transit Center, and Baker's Square are serviced by this route. Buses usually operate on 60-minute headways.
- Route 3A - Alta Heights/Puebla Vista: Pearl Street Transit Center and the Pear Tree Villa are serviced by this route. Buses usually operate on 60-minute headways.

- Route 3B - Puebla Vista/Alta Heights: Pearl Street Transit Center and the Pear Tree Villa are serviced by this route. Buses usually operate on 60-minute headways.
- Route 4 - North Jefferson/Salvador: Pearl Street Transit Center and Napa High School are serviced by this route. Buses usually operate on 60-minute headways and one additional school route operates between 3:00 PM and 3:15 PM.
- Route 5A - South Jefferson/Imola: Pearl Street Transit Center, County Health Department are serviced by this route. Buses usually operate on 60-minute headways.
- Route 5B - Imola/South Jefferson: Pearl Street Transit Center, County Health Department are serviced by this route. Buses usually operate on 60-minute headways.
- Route 6 - North Jefferson/Vine Hill: Pearl Street Transit Center, Napa High School, Redwood Middle School, and Justin Siena High School are serviced by this route. Buses usually operate on 60-minute headways and two additional school routes operate between 7:20 AM and 7:35 AM in the morning and between 3:04 PM and 3:18 PM in the afternoon.

The VINE operates two regional routes to the Planning Area as listed below:

- Route 10 - Calistoga/Vallejo: Downtown Calistoga, Bothe State Park, St. Helena City Hall, Rutherford, Oakville, Yountville Veteran's Home, Solano and Wine Country, Kaiser Permanente, Pearl Street Transit Center, Napa Valley College, American Canyon Recreation Center, Kaiser Hospital, Sereno Transit Center, and Vallejo Ferry are serviced by this route. Buses usually operate on 60-minute headways in the weekdays, 90- to 120-minute headways on Saturdays, and 90- to 180-minute headways on Sundays.
- Route 11 - Calistoga/Santa Rosa: Downtown Santa Rosa, Coddington Mall, Kaiser Hospital, Downtown Calistoga, St. Helena City Hall, Yountville Veteran's Home, and Pearl Transit Center are serviced by this route. Buses usually operate on 140- to 270-minute headways and only operate Mondays through Wednesdays and Saturdays.

Napa Downtown Trolley: The Downtown Trolley has operated within the Planning Area. Significant stops have included Dwight Murray Plaza, the Napa Premium Outlets just across Highway 29, Embassy Suites, the Marriot, Safeway, Fuller Park, Historic Napa Mill, the River Terrace Inn, and COPIA. Trolleys operated daily service at 45-minute headways. However, ridership has never been high and the service is being discontinued in June, 2009.

Paratransit Service

The VINE Go paratransit system provides service to ADA and senior persons within Napa County. Service is provided to people at the northern limit of Calistoga to the southern limit of American Canyon, with limited service to Parts of Vallejo. Operating hours are from 5:20 AM to 9:30 PM on weekdays, 6:00 AM to 8:30 PM on Saturdays, and 8:00 AM to 7:00 PM on Sundays.

Rail Service

Currently, there is no commuter rail system operating in Napa. The Napa Valley Wine Train, a privately operated service oriented towards tourism, passes through Napa County, extending from the City of Napa north to St. Helena. The Wine Train's main station is located in Napa on McKinstry Street, just north of the Soscol Avenue / First Street intersection. The Wine Train operates very occasional freight trips.

The Wine Train's rail lines are part of a larger rail system that connects Napa to Vallejo in the south, Sonoma and Marin counties to the west, and Fairfield and Benicia to the east. Most of these rail connections are operated as freight lines by the California Northern Railroad (CNR).

Future Transportation Improvements

The following transportation projects, as identified in the Napa General Plan, and in recent traffic studies, are proposed within the general vicinity of the Planning Area:

- Gasser Drive is planned to connect to Soscol and Silverado Trail at a new intersection north of the current intersection of Soscol Avenue/Silverado Trail. Additional turn lanes may be anticipated at this intersection.
- The five legged intersection of Third/Silverado/Coombsville/East is planned to be improved; however, there is no approved design to date.
- The City's bicycle routes map was amended in 2007 to provide Class II bike lanes for Silverado Trail and Soscol Avenue south of Third Street.
- Signalization is planned for the Silverado Trail/Trancas Street/Monticello Road intersection before 2020.
- The First Street Bridge across the Napa River is being replaced as part of the Flood Protection Project. Construction is currently underway and is estimated to be completed by fall of 2009.
- The First Street Bridge over SR-29 will be widened to four lanes; no specific design has been approved to date.
- Silverado Trail is proposed to be widened to include a center median/turn lane from Soscol Avenue to north of First Street; Soscol Avenue.

Level of Service Methodology

The City uses level of service (LOS) criteria to measure of the quality of the overall operating characteristics of a street or highway. Factors involved in determining the level of service include speed, safety, travel time, traffic conflicts and interruptions, freedom to maneuver, driving convenience and comfort, and operating costs. Level of service is dependent upon traffic volume and composition of traffic.

Traffic conditions are typically measured through the evaluation of peak hour levels of service (LOS) that characterize traffic conditions associated with varying levels of traffic. Level of service is a measure of congestion that ranges from LOS A (free-flow condition) to LOS F (long delays and congestion). **Table 4.1** provides a definition for each level of service category.

Table 4.1: Level of Service Definitions

Level of Service	Description
A	Free flow with no delays. Users are virtually unaffected by others in the traffic stream. At signalized intersections, turning movements are easily made and all queues clear in a single signal cycle.
B	Stable traffic. Traffic flows smoothly with few delays. An occasional approach phase is fully utilized. Drivers begin to feel somewhat restricted within platoons of vehicles.
C	Stable flow but the operation of individual users becomes affected by other vehicles. Modest delays. Major approach phases fully utilized. Backups may develop behind turning vehicles.
D	Approaching unstable flow. Operation of individual users becomes significantly affected by other vehicles. Delays may be more than one cycle during peak hours. Queues may develop but dissipate rapidly, without excessive delays.
E	Unstable flow with operating conditions at or near the capacity level. Long delays and vehicle queuing.
F	Forced or breakdown flow that causes reduced capacity. Traffic demand exceeds the capacity. Stop and go traffic conditions. Excessive long delays and vehicle queuing.

Source: Transportation Research Board, *Highway Capacity Manual 2000*, National Research Council, 2000.

Signalized Intersections

Intersection level of service is measured as the average control delay in seconds per vehicle. Control delay is the portion of the total delay experienced by drivers at intersections that is attributable to traffic signal operation. It includes the delay for decelerating to a stop at a signal, moving slowly in a queue of vehicles, stopped delay, and acceleration after the signal turns green. To evaluate the signalized intersection level of service, the 2000 Highway Capacity Manual (Transportation Research Board, National Research Council) methodology was used per City of Napa Traffic Study Guidelines. **Table 4.2** summarizes the relationship between the level of service rating and control delay for signalized intersections, as well as unsignalized.

Table 4.2: Level of Service Definitions for Signalized and Unsignalized Intersections

Level of Service	Signalized Intersection Control Delay (seconds/vehicle)	Unsignalized Intersection Control Delay (seconds/vehicle)
A	≤ 10	0 to 10
B	> 10 – 20	> 10 to 15
C	> 20 – 35	> 15 to 25
D	> 35 – 55	> 25 to 35
E	> 55 – 80	> 35 to 50
F	> 80	> 50

Source: Transportation Research Board, *Highway Capacity Manual 2000*, National Research Council, 2000.

Unsignalized Intersections

To evaluate unsignalized intersections, the operations method of the Highway Capacity Manual, Transportation Research Board, National Research Council, 2000 was utilized per City of Napa Traffic Study Guidelines. This methodology determines the LOS based on delay. The delay is for the worst approach when the intersection is controlled with one- or two-way stop signs. The delay is an average for all approaches when the intersection is controlled with all-way stop signs. The LOS criteria for unsignalized intersections are summarized in **Table 4.2**.

As stated in the section on the General Plan's Goals and Policies, the General Plan establishes a midrange LOS D for arterial and collector street intersections within the City with the exception of a midrange LOS E for intersections in the downtown bounded by Soscol Avenue, First Street, California Boulevard, and Third Street.

Existing Conditions Traffic Operations Assessment

Study Intersections

A total of 15 study intersections have been identified for the Downtown Napa traffic analysis. The study intersections were determined, in conjunction with the City of Napa, to be those where majority of the project trips will be focused and where potential traffic impacts are most likely to occur. The study intersection locations are shown in Figure 4.4 and are listed below:

1. Jefferson Street / First Street
2. Jefferson/Second
3. Jefferson/Clay
4. Main Street / Pearl Street
5. Soscol Avenue / Pearl Street
6. Soscol/First
7. Soscol/Third
8. Coombs Street / Third Street
9. Main Street / First Street
10. Main Street / Third Street
11. Silverado Trail / First Street
12. Silverado Trail / Third Street
13. SR-29 Northbound Off-Ramp / First Street
14. SR-29 Southbound Ramps / First Street

15. California Boulevard / First Street

All study intersections are signalized intersections except the SR-29 Northbound Off-Ramp / First Street intersection, which is two-way stop-controlled.

Analysis of Current Conditions – Intersection Level of Service

Downtown Napa has seen varying traffic conditions over the past several years due to various temporary bridge construction road closures; other localized construction closures, constrictions or detours. This is expected to continue in the near future as railroad bridges are replaced just east of Soscol Avenue, and Napa Creek flood improvements get underway as part of the Army Corps of Engineers Napa River Flood Protection Project. The Coombs/Clinton street connection will be eliminated. In addition, there has been new private development, and much of that new development is just being completed and is not yet occupied.

KHA has reviewed several traffic studies relating to the Downtown Area. In conjunction with this review and the City's current efforts to collect additional 2009 traffic counts specific to Downtown, KHA will be able to prepare the existing traffic conditions analysis including existing intersection volumes, geometry and level of service. The analysis will be completed for all conditions consistent with the City's guidelines for EIR transportation analyses.

Emergency Access

There are several areas within the planning area where it is difficult for fire apparatus to maneuver through intersections. In general, any right turn onto a two lane street requires the fire trucks to swing into the oncoming lane either before the turn or during the turn. At times, fire trucks must wait for oncoming traffic to clear which delays response times.

Specifically, the intersection of Second Street/Main Street is often congested during the day and requires fire trucks to wait on Second Street until the intersection clears before they are able to make a left turn onto Main Street. The intersection of Main Street/First Street is typically avoided unless the fire department has a response in the immediate vicinity.

Other areas the fire department has identified access issues are Coombs Plaza and the parking lot which serves the HATT Building and the Napa River Inn.

Parking Policy Context

There is only one specific parking policy in the General Plan:

- Economic Development – ED-3.8: The City shall support creative public and private solutions to providing parking facilities and non-automobile access to Downtown. The City shall strive to maintain an adequate inventory of parking facilities Downtown.

The City's parking requirements are found in the Zoning Ordinance, Chapter 17.54. This section describes existing zoning ordinance standards for parking and loading.

Downtown Parking Exempt Overlay District

Like many larger Downtowns, the City has adopted a Parking Exempt Overlay District (PE District) which applies within the Downtown Core area (Figure 4.5 which also identifies a block numbering system for subsequent parking discussions). The intent of the downtown PE District is to provide a pedestrian-friendly downtown environment through the establishment of public parking facilities, to relieve certain downtown properties from on-site parking requirements, and to control on-site parking on properties within the District. Within the PE District, new development projects do not have to provide on-site parking and loading except for residential uses. This provides each property an opportunity to optimize the use of land and contributes to the pedestrian-scaled downtown environment. It also makes projects more feasible by providing cost-effective, consolidated parking facilities. The PE District is combined with a Parking Benefit zones to fund public parking facilities. The evolution of the PE District and Benefit Zone is summarized below:

- May 1972: Ordinance No. 2117 established Parking and Business Improvement Area No.1 and Benefit Zone No.1
- June 1980: Ordinance established the original Parking Exempt District.
- January 1987: Ordinance No. 3066 expanded the Parking Exempt District by 25 parcels and the boundary of Benefit Zone 1 was amended to be identical to the boundary of the Parking Exempt District. The ordinance also established the parking assessment: Businesses in Benefit Zone 1 pay a 70% surcharge on their business license to help pay for acquisition, construction and maintenance of parking facilities.
- 2005: The Parking Exempt District and Benefit Zone 1 were expanded again to their current boundaries. In addition, an added parking impact fee was established and applied to net new nonresidential development within the PE District to further contribute to the funding of new public parking structure construction in the PE District. The parking impact fee is an essential component to ensuring sufficient parking to support the demand generated by private development.

2004 Revisions to Downtown Parking Standards

As a result of the 2004 *Downtown Napa Mixed-use and Residential Infill Development Strategy*, the City reduced its downtown parking standards recognizing that Downtown should be treated differently than suburban neighborhoods. A detailed parking review was undertaken, including a residential parking demand survey of apartments in and around Downtown, a review of national and other Bay Area city parking studies, review of census vehicle ownership information in the Downtown census tract, and discussion with the City's parking consultant. Residential standards were reduced considering observed lower parking demand in Downtown area apartments, lower vehicle ownership and review of typical urban center standards. Retail and Office standards were reduced (still staying at typical ranges) to be more consistent with how Downtowns (and shopping

centers) operate. That is, in urban centers, the peak parking demand for individual land uses varies throughout the day allowing shared use parking. Additionally, the mix of uses allows people to park once and go many places on foot. Public transit available in downtown Napa also allows people other options to get to Downtown.

Within the Downtown Planning Area, Napa's Downtown parking standards currently apply in the Downtown Commercial District only. Residential uses must meet these standards onsite even in the PE District. Downtown parking standards are *not* currently used in the Oxbow Mixed Use or the Residential Office Districts; these areas currently use the same standards that are applied throughout the remainder of the City.

City of Napa Zoning Parking Standards

The City's Zoning Ordinance specifies the number of parking spaces required for developments within the City as well as loading requirements. These parking and loading requirements are outlined in Chapter 17.54 Parking and Chapter 17.44 PE – Parking Exempt Overlay District. The information contained in these sections of the ordinance lists the parking space requirements for different types of land uses, including the PE District; loading requirements; bicycle parking; and shared parking. The City encourages shared parking and requires bicycle parking facilities in larger new developments.

Following are the relevant excerpts from the Zoning Ordinance:

Chapter 17.54 PARKING				
17.54.040 Parking Requirements				
Residential Uses Downtown CD and CDP Districts <i>(Standards also apply to Soscol Gateway Mixed Use District north of 8th Street for Mixed-Use Development)</i>				
Single family attached, residential condominiums and apartments of 2 or more attached units	Per Unit Parking Requirements			
	Studio	1		
	1 bedroom	1.25		
	2 bedrooms	1.5		
	3 bedrooms	1.75		
Guest Parking for the above uses	Not required unless within 200 feet of a residential district, in which case guest parking shall be provided at 1 space per 4 units; or 1 space per 2 units if units take access from arterials or collectors where on street parking is prohibited.			
Residential Uses Outside Downtown				
Single Family residential, detached	Two parking spaces per unit with at least one garage unit. One space for each additional bedroom beyond two. Guest parking includes one on-site space.			
Residential condominium projects and small lot single family development including all single family attached and detached in RM Districts	1.5 spaces for studio or 1 bedroom units; plus 0.5 space for each bedroom in excess of 1 plus guest parking as described below; At least 1 space shall be in a garage			
Apartments of 2 or more attached units, dwelling group units and attached residential rental units in vertical mixed use projects	Per Unit Parking Requirement			
		1-3 Units	4-49 Units	50+ Units
	Studio/1 Bdrm	1.5	1.4	1.25
	2 Bdrm	1.75	1.60	1.50
	3 Bdrm	2.00	1.80	1.75
	Plus 0.5 space for each bedroom in excess of 3, plus guest parking at 1 space per 4 units; or 1 space per 2 units if units take access from arterials or collectors where on street parking is prohibited.			
Commercial and Office Uses Downtown				
All uses except Hotels and Motels, Bed and Breakfasts which shall use the citywide standard	4 spaces per 1,000 sq. ft. ground floor 3 spaces per 1,000 sq. ft. other floors			
Commercial Uses Outside Downtown				
Bed and breakfast inns	See bed and breakfast standards			
Hotels and Motels	1 space per sleeping room plus 1 space for manager plus 1 space for every 2 employees (full or part time) plus <i>If</i> hotel has convention, banquet, restaurant or meeting facilities, parking shall be provided in addition to the hotel requirement, as determined by Planning Commission, based on parking study provided by applicant and acceptable to the city.			
Retail sales (non bulky items and Personal Services)	4 spaces per 1,000 sq. ft.			
Offices	4 spaces per 1,000 sq. ft, except medical/dental offices and clinics, which require 5 spaces per 1,000 sq. ft.			
Restaurants, cocktail lounges, bars	Higher standards, except in shopping centers, where they are <25% of the total sq. ft, or if >25% a parking study sets the standard and shows how shared parking demand will be met.			

Public/Quasi Public facilities	Standards are typically established through parking studies of the specific use								
17.54.050 On-Site Loading – applies outside the Parking Exempt Overlay District									
<p>All nonresidential buildings 10,000 square feet in size or greater to be occupied by retail, manufacturing, storage, warehouse, wholesale or similar use shall require on-site loading in accord with the following standards:</p> <p>A. Required Loading Spaces.</p> <table border="1" data-bbox="357 420 1006 535"> <thead> <tr> <th>Gross Floor Area</th> <th>Loading Spaces</th> </tr> </thead> <tbody> <tr> <td>10,000 to 24,999</td> <td>1</td> </tr> <tr> <td>25,000 to 49,000</td> <td>2</td> </tr> <tr> <td>each additional 50,000 sq. ft.</td> <td>1</td> </tr> </tbody> </table> <p>B. Size. Each loading space shall not be less than 10 feet in width, 30 feet in length with a minimum overhead clearance of 14 feet.</p> <p>C. Location. Such space may occupy all or part of any required yard but may not be located in the front or side setback area, or between the street and the nearest building unless screened. Loading areas shall also be located and designed to minimize noise impacts on adjacent sensitive uses to the extent feasible.</p> <p>D. Waiver. The Planning Commission may waive the loading requirement or modify the above standards if it is demonstrated that the proposed use does not require loading, that an alternative arrangement satisfies the loading need, or if the proposed site location and design has mitigated aesthetic and noise impacts and provides the best alternative.</p>		Gross Floor Area	Loading Spaces	10,000 to 24,999	1	25,000 to 49,000	2	each additional 50,000 sq. ft.	1
Gross Floor Area	Loading Spaces								
10,000 to 24,999	1								
25,000 to 49,000	2								
each additional 50,000 sq. ft.	1								
17.54.060 Bicycle Parking.									
<p>All nonresidential uses required to provide 10 or more vehicular parking spaces shall also provide bicycle-parking facilities according to the following standards:</p> <p>A. <u>Spaces</u>. 1 bicycle space for each 10 vehicular spaces is required.</p> <p>B. <u>Modifications</u>. The parking requirement for any specific use listed may be modified with a Use Permit in order to provide adequate parking, which is fair, equitable, logical and consistent with the intent of this Chapter. Such modification shall be subject to review and approval by the Planning Commission.</p> <p>C. <u>Lockers</u>. Bicycle lockers may be installed but are not required.</p> <p>D. <u>Waiver</u>. The decision-making body may waive or reduce this requirement only if it can be demonstrated that the bicycle parking facilities are provided nearby to satisfy the proposed requirements or there is pre-existing development such that there is no feasible location for such facilities.</p>									
17.54.080 Parking Requirements for Shared Parking and Offsite Parking.									
<p>A. <u>Multiple Standards</u>. When a single structure or lot contains multiple uses, more than one standard may apply, depending on the uses proposed.</p> <p>B. <u>Shared</u>. Shared parking solutions are encouraged. Required parking minimums may be reduced with a Use Permit provided that the shared parking spaces are:</p> <ol style="list-style-type: none"> 1. Located in a common parking lot or off-site convenient to the use(s) requiring the parking; and 2. The parking will be secured for the use(s) requiring the parking by ownership and/or agreements sufficient to guarantee the long term use of the site for such parking; and 3. The applicant is able to show through a parking analysis that peak demand for spaces from all uses will be met. A possible option for determining shared parking arrangements includes the Urban Land Institute Publication "Shared Parking". 4. In no instance shall the total parking required be less than would be required for any one of the independent uses. <p>C. <u>Offsite</u>. Offsite Parking for a use may be approved with a Use Permit consistent with B.1 and B.2 above.</p>									

Chapter 17.44 PE - PARKING EXEMPT OVERLAY DISTRICT
17.44.030 On-Site Parking and Loading Regulations.
<p>A. No Onsite Parking and Loading except for Residential uses. No on-site parking and loading facilities shall be required for any property zoned: PE, except for a residential use or development.</p> <p>B. Residential Standards. Parking for residential development in the :PE overlay district shall be provided in accordance with the requirements of Chapter 17.54 with the following variations:</p> <ol style="list-style-type: none"> 1. Guest parking shall not be required. 2. Offsite parking or use of on-street parking for a limited number of units (typically 3 or fewer) may be authorized by the Planning Commission with approval of a Use Permit. In order to approve such a permit the Planning Commission shall find that the offsite parking facility is reasonably accessible and secure to the tenants and is available long term; or that adequate curb parking is available adjacent to the property; or that onsite parking for the residential units are not needed. <p>C. Use Permit Required Establishing On-site Parking for Commercial Uses. On-site parking for commercial uses may only be established on properties zoned: PE through approval of a Use Permit. In granting such a permit, the decision-making body shall find that the parking has been located and designed so that it does not conflict with Downtown building concentrations and pedestrian orientation.</p>

Existing Parking Conditions

Available past reports and studies and data related to parking in the downtown were reviewed to determine applicability, and new field surveys of existing parking throughout the entire Downtown Planning Area were conducted by City staff.

Previous Parking Studies in Downtown Napa

Walker Parking Consultants prepared a comprehensive parking demand and management analysis of the City of Napa Parking System in 2002 (Walker Study). This study was to provide the City with answers to three questions:

- Is the parking system adequate at the current time to accommodate all of the demand that is being generated by Downtown workplaces and businesses?
- Is the parking system being managed in the most effective way or could improvements be made that would increase its efficiency?
- Will the parking system be sufficient in the future or are new parking resources needed? If more parking is needed, how much?

In 2002, the city’s public parking system consisted of 3 parking garages with 865 spaces: Pearl Street - 403 spaces, Clay Street - 291 spaces and Second Street - 171 spaces. There were also 13 surface parking lots with 574 spaces, and 965 onstreet spaces in the surveyed area at that time (see **Figure 4.6**)

The 2002 study analyzed the occupancy rates of on- and off-street parking on 32 blocks in the core Downtown. The study’s project area was divided into two subareas with Randolph as a divider between the east and west sides. The east side contained the County buildings, Napa Town Center, and Main Street. The west side included City buildings, the Uptown Theater building (not open) and smaller-scale retail and offices.

The 2002 Walker Study found that the parking supply was just adequate to meet Friday evening demand during July on the east side of the study area, which was primarily due

to the presence of the Chef's Market on Friday. Saturday evening peak demand, with similar attendance at the Opera House was considerably lower. (The Chef's Market has been moved since then to Thursday.) Weekday daytime demand was highest on Wednesday but was not as high as Friday night; however, daytime demand surveys showed localized shortages occurring near the County buildings. There were a significant number of unused spaces in the Pearl Street garage. The west side of that study area had a significant surplus of spaces at all times; in particular, the Clay Street Garage was underutilized.

Findings and Recommendations of the 2002 Walker Study

- Parking supply on the east side was barely adequate to meet demand on a Friday during July with the Chef's Market.
- There was unused supply in the Second Street Garage during peak evenings but it was full during daytime peaks.
- Surface lots in the east side were over their effective capacities and on-street parking was close to its effective capacity on a peak summer Friday evening.
- The east area parking supply would need to be expanded to accommodate growth and to replace spaces anticipated to be lost due to future Flood Project Oxbow Bypass construction.
- The west area had a significant surplus of spaces at all times. In particular, the Clay Street garage was underutilized.

Conclusions

The Walker Study did not technically identify a parking shortage since the overall study area maintained more parking supply than demand. However, the east side of the study area was at capacity on busy Friday nights and crowded conditions occurred in some lots and on some streets during the weekdays. The Walker study recommended that such weekday conditions could be alleviated by shifting demand to the Pearl and Clay Street Garages. To encourage this shift, the Walker Study had the following recommendations:

- Continue to improve garage security and street safety.
- Clarify and enforce on-street parking time limits.
- Encourage use of peripheral parking through financial incentive and permit controls.

The City has taken many measures to address the Walker Study recommendations. **Table 4.3** outlines the status of the recommended implementation actions from the Walker Study as well as other items.

Table 4.3: Downtown Parking Management Plan Status

Recommendation	Description	Status
SECURITY AND PHYSICAL IMPROVEMENTS		
1. Improve Security Measures	Expand hours of Security Guards; consider starting them later in the day and keeping them later in the evening.	Security firm contract terminated 2008. Security now provided by Police Department.
	Post one guard at Pearl St. Garage entrance from 5:00 – 6:00 p.m. for increased safety and to promote greater County/Court employee usage	Completed in 2006. No longer in place with termination of security contract.
	Install closed-circuit television monitoring system	Police Department is working with IT on purchasing security cameras.
	Retain security consultant for additional security recommendations	No action taken to date.
2. Enhance Garages to Promote Security, User Friendliness	Repaint striping with brighter paint	Complete 2006.
	Refresh/repaint interiors of garages: Pearl Street first	Pearl Street garage entrance painted. Due to cost constraints, painting limited to entrances and some beams / posts.
	Replace and clean-up landscaping	Ongoing.
	Implement Regular Maintenance Program	Complete. Include power washing annually; removing garbage daily; blow & sweeping weekly; cleaning elevators daily; checking lights quarterly (inter-departmental).
3. Improve Linkages to Garages	Improved directional signage Improved lighting of pathways to garages Landscape maintenance and improvements along pedestrian pathways	Parking directional signs in place. Clay Street interior signs replaced. Napa Downtown Association is working on directories near garage exits.
4. Educate Public about Security and other Garage Enhancements	Inserts in employee paychecks about changes and improvements Other forms of information dissemination – newsletters, newspaper articles	Complete – e-newsletter information, updated parking map/brochure, other methods of outreach.
PERMIT AND TIME ENFORCEMENTS		
5. Define and Enforce Time Limits	Update parking code to disallow moving on-street cars to another space; and	Researched and determined to table this until Fifth Street garage constructed to see if the problem persists.
	Purchase hand-held parking enforcement computers.	Complete; but not being utilized in 2009.
6. Minimize Impact of Jury Parking	Work with courts to encourage jurors to park in Clay St. and/or Pearl St. garages.	Need to reassess with new Fifth Street garage; determine impacts.
	Explore feasibility of shuttle from Clay St. and/or Pearl St. garages during key a.m. and p.m. hours	Need to reassess with new Fifth Street garage; determine impacts.
7. Permit Changes	Establish permit price differentials for different parking areas – make prime lots and Second St. Garage more expensive (i.e., \$50/month) than outlying areas (i.e., \$30/month)	Need to reassess with new Fifth Street garage; determine impacts.
	Analyze method of permit issuance to make it easier on holders to purchase permits	Completed 2005.

Recommendation	Description	Status
	Maintain current level of permit spaces at 85, but keep option open of issuing up to 100 permit spaces	Completed 2006 – 100 permits are now available for purchase.
8. Permit Controls	Control number of permits spaces in certain places: reduce the number in central surface lots and increase in Second Street Garage or peripheral lots. Change central surface lot spaces to short-term parking. As development occurs over time, consider extending permit parking to other garages.	Permit space adjustments are ongoing.
9. Clarify Nighttime and Weekend Permit Enforcement	Make clear that permit spaces are not enforced at night or on weekends.	Improve signage – no action to date.
FUTURE PARKING FACILITIES		
10. Develop a Plan for Flood Protection Project Replacement Parking in Northeast Section of Downtown and Potential Future Parking Opportunities	Spaces that will be lost with construction of the Flood Protection Project include: 122 spaces in Lot X (CineDome) 20-25 spaces in Lot F (Pearl St.)	Site acquisition in process, 2009. Design, identify construction funding 2009-10.
11. Work with the County to Construct a New Parking Structure on Southeast End of Downtown	Work with NCTPA and County to reevaluate feasibility study for a garage and transit terminal on the County-owned site at Fifth & Coombs.	Construction completed 2008.
MISCELLANEOUS		
12. Encourage Alternative Transit Use	Continue to work with NCTPA, the County, Courts and other downtown employers to encourage use of public transit, carpooling, bicycles, and the trolley.	Trolley ending service June 30, 2009.
13. Reevaluate the Parking Exempt District Boundaries	When certain properties redevelop they will not be required to provide on-site parking. Determine whether modifications should be made to the Parking Exempt Ordinance to place more responsibility for future parking on private developers in this district.	Complete 2005.
14. Identify designated parking areas for construction personnel	With all the construction activity that is occurring, both private and public, the City should explore locations where construction personnel can park within reason to lessen the impact on public parking.	Ongoing through Construction Coordination function in Public Works.

2009 Parking Supply

Data Collection

The 2009 parking survey includes the entire Downtown Planning Area, a larger area than the original 2002 Walker Parking Study as shown on **Figure 4.5**. In general, there are several blocks to the west, north and south of the original survey that are added, as well as the Oxbow area east of Soscol. The Oxbow area, east of the core Downtown, is not

within the PE District and is required to provide onsite parking. Copia and the Wine Train have two large private parking lots as well as public on-street parking. There are shared parking agreements between Copia and the Oxbow Public Market. Copia (American Center for Food Wine and the Arts) closed due to financial difficulties in early 2009. Reuse and redevelopment of Copia is likely.

Each block within the Downtown Planning Area was assigned a number consistent with the original numbering convention used in the 2002 parking study. Each block face was labeled north (N), south (S), east (E), and west (W) for collecting on-street parking data and then totaled. Each off-street parking lot or parking structure is identified with a letter designation (see **Figure 4.6**). Data was recorded using this numbering system.

Most block faces within the Downtown Planning Area have on-street parking spaces. Nearly all of the on-street parking is parallel parking, with the exception of the east side of City Hall (Block 11), and on Brown Street west of the Napa Mill (Block 32E, east side), where angled or perpendicular parking is striped. Most of the parallel parking spaces are delineated with pavement markings. Where pavement markings were not present to delineate parking spaces, the number of on-street spaces was estimated by visual observation.

Existing On Street Parking Supply

In May 2009, the City of Napa counted 882 on-street parking spaces in the core Downtown Walker Parking Study Area surveyed in 2002. In addition to the previously surveyed parking supply, there are 291 additional on-street parking spaces in the Downtown Planning Area west of Soscol outside of the 2002 survey area plus 136 on-street spaces in the Oxbow area.

Existing Off-Street Parking Supply

Off-street parking consists of surface lots and parking structures. Private parking lots were not included as part of this analysis. There are 673 spaces in 13 public surface parking lots and 1,350 spaces in 4 public park structures for total off-street parking spaces in the study area in 2009.

Specific changes to the parking supply since 2002 are as follows:

- There has been a 143 space reduction in onstreet spaces in the survey area
- The G lot on Block 7 (52 spaces) is temporarily closed and being used as a staged construction area with no parking allowed.
- A new 485-space Fifth Street public parking garage was completed on Block 29.
- Block 28 was converted to a 119-space public lot owned by the County. It is available for the foreseeable future but could eventually be converted to other facilities.
- "Sam's Lot" which is located on Clay Street behind Exertec (Block 10) was acquired by the Redevelopment Agency in 2007 and became public parking in May 2009. It contains 37 spaces.
- There has been a permanent loss of parking spaces:
 - 18 spaces on south side of the Fifth Street Parking Garage Block 29.
 - 6 spaces on the south side of Block 10 (First Street valet spaces for AVIA Hotel).

- o 20 spaces in the M-S parking lot (Block 35).
- Chef's Market has moved to Thursday evenings.
- New development has been constructed, most of which is not yet occupied – and other changes have occurred.
 - o Mervyns closed in early 2009; this major retail space will be occupied by Kohl's in September 2009.
 - o On the east side, the Riverfront Mixed Use project has been constructed and is ready for occupancy. While in the PE District, the Riverfront project provided 242 underground private spaces for its residential and commercial tenants.
 - o Main Street West on the northeast end of the PE District has been constructed and is partially occupied.
 - o On the west side, Napa Square, the Avia Hotel and Zeller Building have been constructed and are ready or very close to ready for occupancy but not yet occupied. While not required, Napa Square provided 49 spaces of new underground parking for its commercial tenants.

What has not changed since 2002 is that many buildings along First Street and in the Napa Town Center continue to be vacant.

In total, there has been a substantial (18%) increase in parking in the Downtown Planning Area since 2002 primarily due to the new Fifth Street parking garage and the Third Street County lot. On-street parking counts are reduced from the 2002 Study due to permanent losses as noted above, 2002 overcounts and other unknown reasons.

Summary of Parking Space Changes in the Core Downtown Survey Area

In total, there has been a substantial (18%) increase in parking in the Downtown Planning Area since 2002 primarily due to the new Fifth Street parking garage and lot. Onstreet parking counts are reduced from the 2002 Study due to permanent losses as noted above, and due to 2002 overcounts and other unknown reasons.

**Summary of Parking Space Changes in the
Core Downtown Survey Area (2002 Walker Parking Study area)**

	2002 Survey	2009 Survey	Net Change
On-street	965 spaces	822 spaces	(-143)
Parking Lots	574	673*	+99
Parking Garages	865	1,350**	+485
Total	2,404	2,845	+441

**Includes 52 space lot G which is temporarily closed due to construction, a new 119 space County lot, and permanent loss of the 20 space MS lot.*

*** Pearl Street Garage: 403 spaces; Clay Street Garage: 291 spaces; Second Street Garage: 171 spaces, and Fifth Street Garage: 485 spaces.*

The 2009 parking space inventory for the entire Downtown Planning Area is summarized below.

Description	2009 Inventory
On-Street – Downtown 2002 survey area	882
On-Street – remainder in Planning Area west of Soscol	291
On-Street – Oxbow District	<u>136</u>
<i>Subtotal On-Street</i>	<i>1,309</i>
Off-Street – lots	673
Off- Street – Structures	<u>865</u>
<i>Subtotal Off-Street</i>	<i>2,023</i>
Total	3,332

The number of on- and off-street parking spaces by block is summarized in **Tables 4-4** through **4-6**.

Table 4-4: Update of Public Parking Supply in the Walker Core Study Area
March 2009

Block #	On/Off Street	Total Spaces	Block #	On/Off Street	Total Spaces	Block #	On/Off Street	Total Spaces
1	On	25	12	On	12	23	On	36
	Off	85		Off	-		Off	-
Subtotal		110	Subtotal		12	Subtotal		36
2	On	30	13	On	26	24	On	24
	Off	-		Off	-		Off	-
Subtotal		30	Subtotal		26	Subtotal		24
3	On	32	14	On	23	25	On	20
	Off	-		Off	82		Off	-
Subtotal		32	Subtotal		103	Subtotal		20
4	On	14	15	On	16	26	On	27
	Off	-		Off	178		Off	-
Subtotal		14	Subtotal		194	Subtotal		27
5	On	17	16	On	17	27	On	34
	Off	-		Off	27		Off	-
Subtotal		17	Subtotal		44	Subtotal		34
6	On	27	17	On	26	28	On	16
	Off	-		Off	-		Off	119
Subtotal		27	Subtotal		26	Subtotal		135
7	On	16	18	On	27	29	On	30
	Off	464		Off	-		Off	494
Subtotal		480	Subtotal		27	Subtotal		524
8	On	19	19	On	28	30	On	31
	Off	61		Off	-		Off	-
Subtotal		80	Subtotal		28	Subtotal		31
9	On	32	20	On	28	31	On	30
	Off	116		Off	10		Off	-
Subtotal		148	Subtotal		38	Subtotal		30
10	On	25	21	On	31	32	On	23
	Off	296		Off	-		Off	-
Subtotal		321	Subtotal		31	Subtotal		23
11	On	49	22	On	31			
	Off	-		Off	55			
Subtotal		49	Subtotal		86			
Subtotal On-Street Spaces							822	
Subtotal Off-Street Spaces							2,023	
Total On- and Off-Street Parking Spaces							2,845	

* Temporary reduction of 52 spaces for construction.

**Table 4-5: Onstreet Parking Supply May 2009
Remainder of Planning Area West of Soscol**

Block #	On Street
5-N	12
5-W	43
6-N	12
7-N	10
10-W1	17
10-W2	29
11-W1	18
11-W2	15
17-W	23
35	13
32-E	43
1-N	27
2-N	9
4-N	20
Subtotal	291

**Table 4-6: Onstreet Parking Supply
Oxbow Area, May 2009**

Block #	On Street
A	5
B	20
C	22
D	3
E	12
F	10
G	33
H	31
Subtotal	136

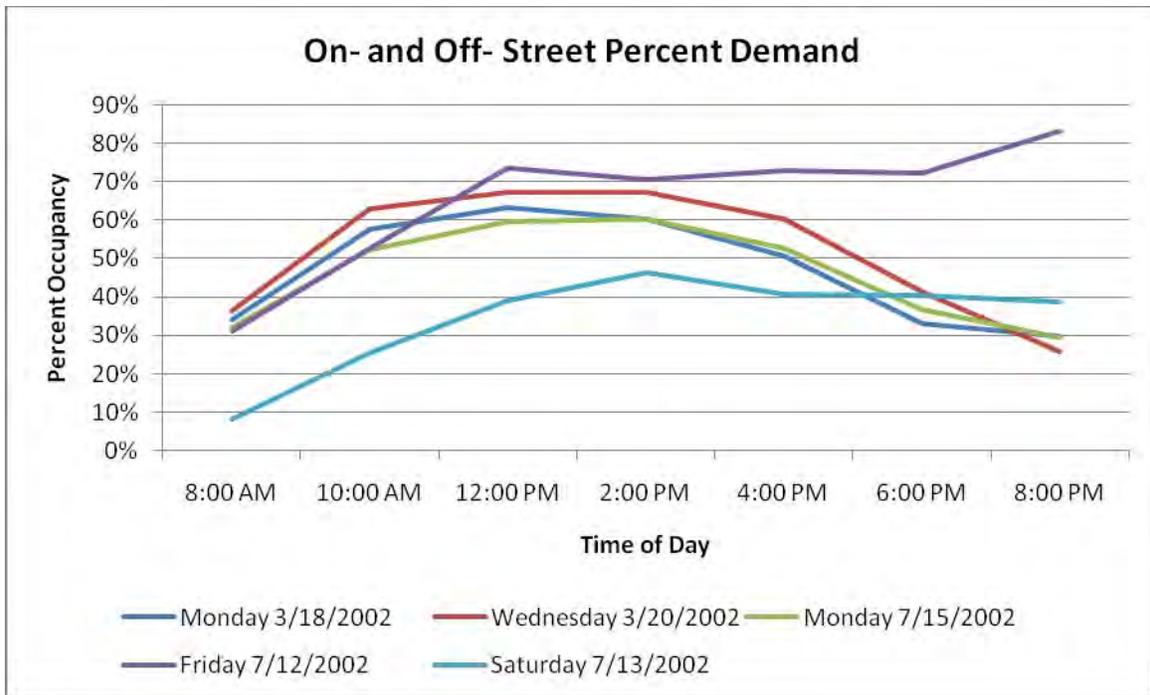
Existing Parking Demand

Parking demand is summarized in terms of the percentage of parking spaces that are occupied at any given time of day. Generally, there is a single peak period that contains the highest number of accumulated parked vehicles. The parking demand data from the 2002 Walker Study was used as the basis to estimate the peak parking period on a weekday, Friday, and Saturday. **Error! Reference source not found.** shows the daily accumulation of both on- and off-street parked vehicles within the Walker Parking Study Area in 2002. Peak hour parking demand in 2002 occurred at the following times:

- Highest demand – Friday night at 8:00 PM.
- Weekday peak demand – Wednesday day at 12:00 PM.
- Saturday peak demand – Saturday day at 2:00 PM.

The profile shows higher demand during the day with a distinct peak at night. For the purposes of collecting peak parking demand counts in 2009, the peak periods listed above were chosen. Even though court is in session on Mondays and Tuesdays, the Walker Study initially showed the weekday peak to occur on Wednesday, thus this study used Wednesday. (Later counts were conducted in July on a “jury” day, which typically occurs on Monday or Tuesday, and found slightly higher counts than Wednesday.) While the Chef’s Market is no longer operating on Friday evenings, Friday’s profile was used as a conservative approach for peak seasonal demand, as Friday summer evenings in 2009 will have the Opera House and outdoor music events, in addition of dining and additional summer/nighttime activity happening.

Figure 4.7: Total On- and Off-Street Parking Demand (2002)



2009 Parking occupancy data was collected during the peak period on the following days starting at the times consistent with the Walker Study peak demand:

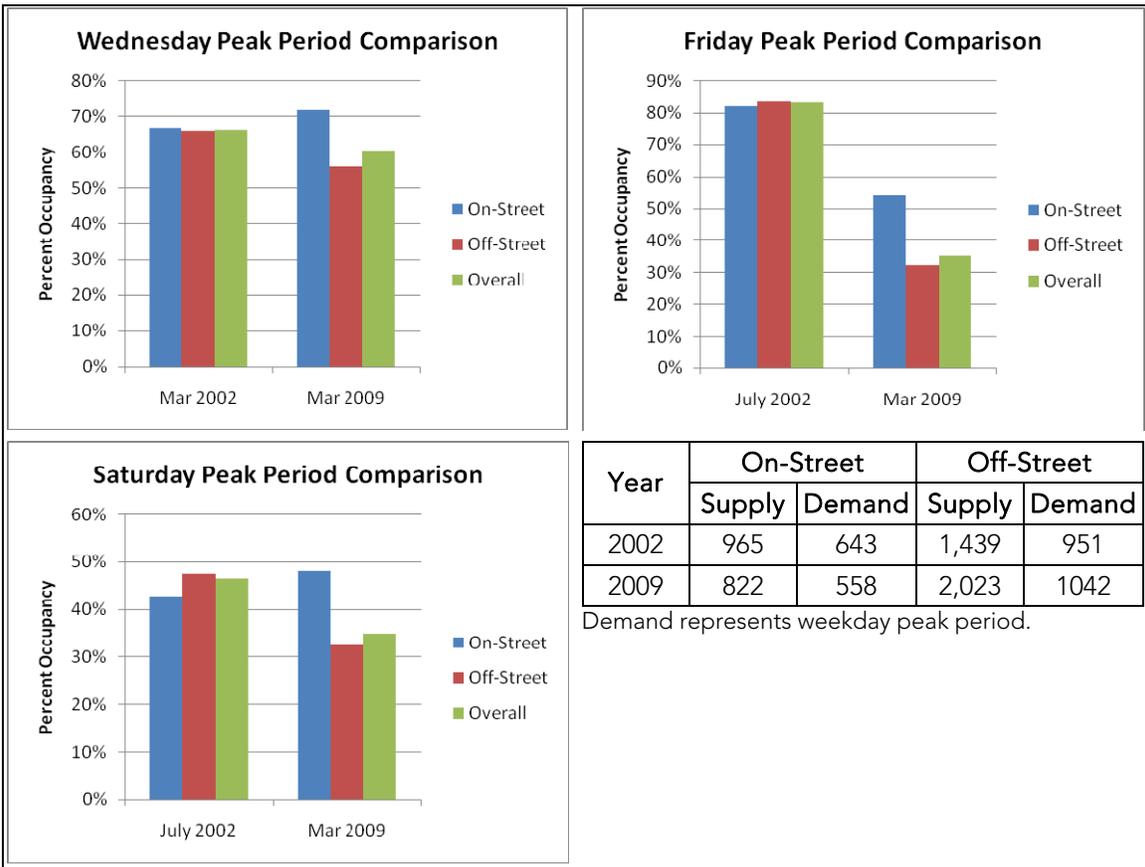
- Wednesday, March 18, 2009, starting at 12:00 PM.

- Friday, March 20, 2009, starting at 8:00 PM.
- Saturday, March 21, 2009, starting at 2:00 PM.

Data for these peak times was collected during the off season and used to compare and verify any significant changes in the peak parking demand versus the Walker Study.

At the block level, individual blocks have a wide range of on-street and off-street parking occupancies. **Figure 4.8** depicts the existing peak hour occupancy percentages on a Wednesday, Friday, and Saturday, respectively, comparing the 2009 and 2002 survey findings.

Figure 4.8: 2002 and 2009 Peak Period Parking Demand Comparisons Within the Walker Parking Study Core Area



Results

Based on the data collection and counts of existing increased supply and demand in 2009, it appears that there is a more than adequate number of parking spaces within the Planning Area to accommodate current demands based on the current levels of occupancy in the downtown. **Table 4.7** shows the total supply and actual demand based on the 2009 parking surveys. It is important to note that the current parking demand does not reflect demand from newly constructed, but not yet occupied development.

Tables 4.8 and 4.9 compare historical occupancy data for the City's three older public parking garages (Pear, Clay and Second Street). **Table 4.8** presents Friday evening occupancies while **Table 4.9** presents weekday occupancies. Garage occupancies are shown to be declining, however, the 2009 counts were conducted in March 2009 and do not reflect downtown Napa's peak season. With the construction of the new Fifth Street garage, it appears, based on historical data, that the downtown provides adequate off-street parking supply to accommodate demand given current levels of vacancy. Furthermore, the moving of Chef's Night to Thursday evenings will reduce the parking pressures historically experienced on Friday evenings.

Table 4.7: Total Existing Parking Demand Within the Downtown Core Area – March 2009

Description	Existing 2009 Inventory	Weekday Demand	Friday Demand	Saturday Demand
On-Street	822	558	310	316
Off-Street	2,040	1,042	599	612
Total	2,845	1,600	909	928

Table 4.8: Historical Parking Demand Data for Public Garages – Friday Evening

Source of Count		Walker	City			KHA
Peak Hour = 8:00 PM		Friday	Friday	Friday	Friday	Friday
Garage	Inventory	7/12/2002	8/18/2006	6/15/2007	2/6/2009	3/20/2009
Pearl Street	403	403	403	393	29	26
Percent Occupancy		100%	100%	98%	7%	6%
Clay Street	296	168	116	105	29	23
Percent Occupancy		57%	39%	35%	10%	8%
Second Street	178	66	178	129	80	91
Percent Occupancy		37%	100%	72%	45%	51%
Subtotal	877	637	697	627	138	140
Total Percent Occupancy		73%	79%	71%	16%	16%

Table 4.9: Historical Parking Demand Data for Public Garages – Weekday

Source of Count		Walker			City						KHA
Peak Hour = 12:00 PM		Mon	Wed	Mon	Mon	Tues	Mon	Tues	Mon	Tues	Wed
Garage	Inventory	3/18/02	3/20/02	7/18/02	8/14/06	8/15/06	6/11/07	6/12/07	2/2/09	2/3/09	3/18/09
Pearl St	403	225	169	173	188	227	189	240	163	187	172
Percent Occupancy		56%	42%	43%	47%	56%	47%	60%	40%	46%	43%
Clay St	296	72	146	66	116	110	121	139	179	172	135
Percent Occupancy		24%	49%	22%	39%	37%	41%	47%	60%	58%	46%
Second St	178	160	160	132	140	147	159	159	119	135	126
Percent Occupancy		90%	90%	74%	79%	83%	89%	89%	67%	76%	71%
Subtotal	877	457	475	371	444	484	469	538	461	494	433
Total Percent Occupancy		52%	54%	42%	51%	55%	53%	61%	53%	56%	49%

Conclusions

The City does counts annually or biannually at the city's Pearl Street, Clay Street and Second Street garages to monitor their use. Counts have been provided for 2006, 2007 and 2009. The latest count was also done off-peak season to observe how the Fifth Street garage is affecting other garages. There was a drop in demand at the Second Street garage; The Clay Street garage experienced an increase in use; and the Pearl Street garage demand decreased in 2009. Overall, all the garages showed a slight decrease in weekday occupancy between the 2007 and 2009 counts. This reduction may be attributed to seasonality

The new Fifth Street garage has reduced the weekday parking demand in the Second Street garage. The Pearl Street garage demand decreased because of Mervyns and shopping center vacancies. Historically, the Pearl Street garage has not gone over 60 percent occupancy on a weekday. With the Fifth Street garage open and building vacancies, the three other garages are still under 60 percent occupancy.

The 2009 demand counts include the new Fifth Street garage. The new Fifth Street garage has shifted at least 220 parked cars from on and off street public facilities in the study area. Vacancies and depressed economy are also expected to have reduced demand on a typical weekday. Overall, public parking is 50-60 percent occupied. This lower occupancy is likely due to the facts that the survey was taken in March (off peak season); slow economic conditions, and because there is new, excess capacity in the new Fifth Street garage. Future analysis will be adjusted for new development and proposed Specific Plan development.

Issues and Opportunities

Based upon stakeholder interviews, background reports, and site visits, the following section summarizes challenges and opportunities that may be addressed in the planning process.

Issues that May Need Further Exploration in the Specific Plan Process

- Lack of paid parking and parking meters in the downtown make it difficult to control short-term parking supply.
- Concerns that the City subsidizes most of downtown parking;
- Concerns that employees and owners are utilizing prime on-street parking and rotate spaces throughout the day
- Lack of security in and around off-street parking discouraging employees from using these facilities.
- Lack of management of the parking supply.
 - Enforcement of time restrictions – police (security company contract terminated in 2008).
 - Poor maintenance of facilities.
 - Concern about the use of Parking Exempt District fees.
- Parking structures
 - Older structures are considered to be poorly designed, unattractive, and underutilized. Some community members feel they need to be replaced.
 - Ground level (three-hour limit) parking is severely underused.
 - Structures suffer from vandalism and graffiti.
 - Some community members believe the elevators in older structures need to be replaced.
- Flood Protection project will be removing about 240 spaces south of the Cinedome which will need replacement.
- Avia Hotel project is going to be using top level of Clay Street garage.
- There are no obvious garages on First Street. All are behind the businesses.
- Some members of the community believe that converting one-way to two-way reduces capacity and requires expensive infrastructure improvements (e.g., curb radii on bulbouts).
- There are disconnects in street grid system.
- Off-street loading zones are not required in Downtown for non-residential uses resulting in a lack of needed loading spaces.
- City Public Works standards have minimum street width requirements: 20-foot clear, unobstructed; 28-foot with parking on one side; 36-foot with parking on both sides.
- Community members believe that emergency vehicle response times through downtown need to be fully considered in planning.

Opportunities and Ideas to Explore During the Specific Plan Process

- The use of Parking Impact Fees collected on new non-residential development.
- Reconsider the responsibility of the Parking Authority established a few decades ago.
- Reevaluate parking exempt district boundaries.

- Create additional parking benefit zones or combine the parking benefit zones in downtown.
- Install gateway features and wayfinding signs that clearly define the downtown, parking facilities, and popular destinations.
- Install parking guidance signs that show parking available in public lots / garages and directions to parking.
- Install additional parking meters or pay parking pedestals.
- Consider advanced parking meters and pay parking (i.e., pay with credit / debit).
- Develop strategies to keep on-street for short-term visitors and customers.
- Clearly define and enforce time limits on parking.
- Clarify nighttime and weekend permit enforcement.
- Consider valet parking operations.
 - Explore requiring high-demand businesses to form a valet parking cooperative.
 - Explore use of a single valet system that allows drop-off and pickup in different locations.
- Improve security measures in public parking facilities.
 - Install closed circuit television monitoring.
 - Increase enforcement.
- Improve pedestrian linkages to garages.
 - Directional signage.
 - Lighting of pathways.
 - Landscape maintenance and improvements along pathways.
- Educate public about and/or promote security and other garage enhancements.
- Control and/or limit the number of permit spaces.
- Encourage alternative transit use.
- Identify designated parking areas for construction personnel.