

Parking Study & Analysis within the Fifth Avenue South Business Improvement District

*Prepared by
Fifth Avenue South
Business Improvement District
for the Mayor and Council
of the City of Naples
May 2013*



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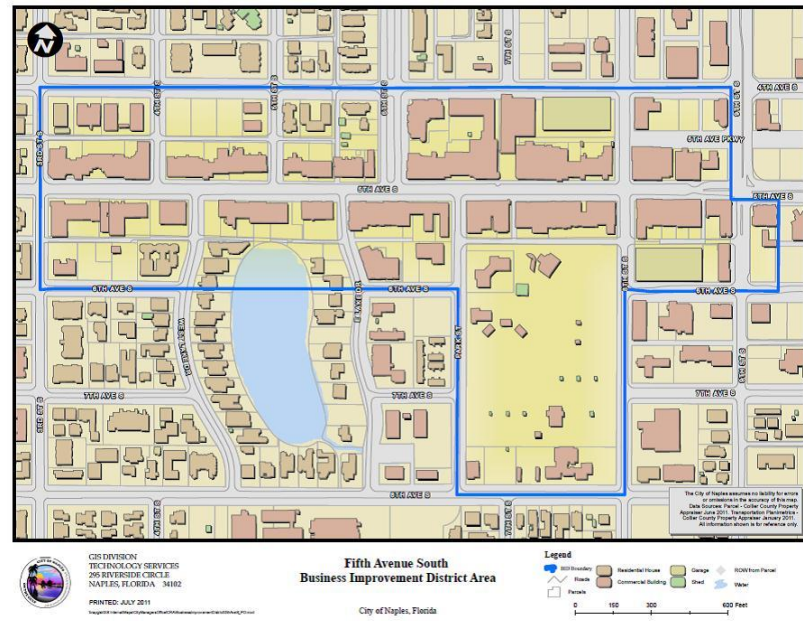
Introduction & Executive Summary

In February 2013, the City of Naples initiated a comprehensive review of City Parking Regulations with specific emphasis on parking in downtown.

In response the Fifth Avenue South Business Improvement District (BID), requested a 90-day delay on decisions impacting parking within the BID district to allow time to inventory existing public and private parking, to poll BID business and property owners, and to analyze findings.

This report addresses those findings.

The study and analysis was primarily conducted within the boundaries of the Fifth Avenue South Business Improvement District (BID). Ancillary parking options were surveyed immediately outside of the BID district.



Over a three month period, the Avenue Enrichment Committee of the Fifth Avenue South BID facilitated a process that included information gathering, outreach, and review towards preparation of this Parking Study & Analysis.

Review of the findings, has resulted in a determination that insufficient parking exists to support the large number of employees, customers, clients, concert goers and other visitors to the district.

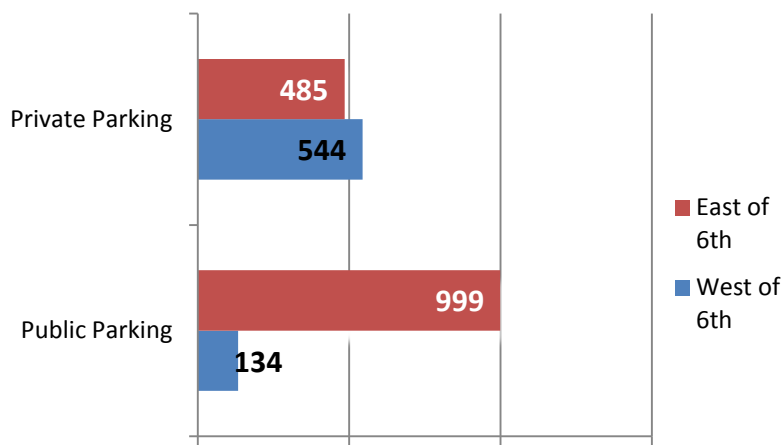
Currently 2,162 public and private parking spaces exist within the BID district. The majority of those spaces (1,484) are located east of 6th Street and concentrated heavily around 8th Street South. (See adjacent chart and maps 1-4).

Andres Duany, in his *2004 Master Plan Update*, directly correlated the enhanced parking on the east end, specifically, the first parking garage, with the vibrant growth and success of that three block segment. He further observed that the blocks west of 6th Street were not redeveloping as rapidly. His recommendation: Move forward with a west end parking garage.

That concern continues today as only 678 of the total 2,162 parking spaces are located west of 6th Street.

When compared with the numbers of daily employees working within the BID district, it becomes obvious that insufficient parking exists to support the BIDs many users.

Parking Configuration within BID District



Currently, 1,428 daily employees work within the BID district, Monday through Friday, 8AM to 5PM. Of those employees, 898 work in businesses to the east of 6th Street, and 530 work in businesses to the west of 6th Street.

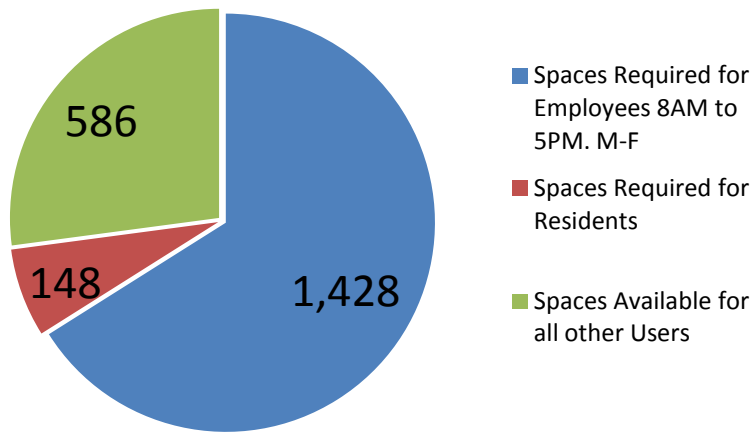
As our surveys have shown, the majority of parking within the BID district is located east of 6th Street. With 1,484 parking spaces, this three block area has flourished in keeping with Duany's vision as a concentrated retail and cultural arts segment. Unfortunately, the west end of the district has not had the same success. Today, only 678 parking spaces exist to support the more than 87 businesses, 530+ daily employees, residents and customers.

Based on these findings, it appears that on-street parking by employees, while not preferred, is a symptom of the larger issue—lack of adequate parking resources.

As recently as 2009, the Avenue was suffering a first floor vacancy rate of 23 percent. Taking heed of the recommendations made by the Duany and Robert Gibb's reports, civic and community leaders moved forward with a number of initiatives aimed at growing and sustaining Fifth Avenue South. Chief among them was the formation of a business improvement district to manage and promote the district.

Today, with a rebounding economy and a strategic program of economic development, marketing and promotion, the Avenue is experiencing a renaissance. The once 23 percent vacancy rate has dwindled to the 4 percent range as formerly vacant first floor spaces have been occupied by retail, restaurant and specialty services.

**Parking Usage:
2,162 total parking spaces in
BID District**



Businesses



One sector of the district that has grown exponentially over the past ten years is the office sector. (See chart to the left). Today, offices occupy 80+ locations within the district. When managed, office growth is extremely healthy for business districts providing a captive audience of shoppers and diners throughout the week. But, as Duany noted in his *2004 Update*, office use of primary first floor spaces limits retail growth and blocks connectivity with the rest of the district. Offices also contribute to the parking crunch within the district. However, if managed appropriately, private parking for daily offices can be used to supplement night and weekend parking for employees and customers.

Even with the positive growth that has occurred, parts of the district are struggling. Today, 30,000 square feet of office and retail space on the west end of the district is un-leased. These spaces are repeatedly rejected by prospects who prefer the more lively east side and its multiple parking options.

Ensuring that adequate resources are in place to promote and sustain economic vitality is critical. Adequate parking is paramount to that success.

The next two pages outline the conclusions and considerations derived from this comprehensive study and review. We ask that the full report be read in order to understand the findings that lead to our conclusions.

Conclusions

- The Fifth Avenue South Business Improvement District plays a significant role in the Naples economy providing substantial revenues to support the City and CRA's realization of community goals.
- The Fifth Avenue South District has the largest concentration of professional offices in Downtown with 80+ offices within the district, and the largest concentration of food uses in Downtown with 40 restaurant and food specialty service locations. The large numbers of employees associated with these uses directly impacts the need for additional parking.
- Business development and property redevelopment on the west end of the district can be aided by the addition of public parking.
- Employee use of on-street parking spaces, while not a preferred practice, at least in the majority of cases, appears to be a symptom of the larger problem—lack of adequate parking resources.
- Insufficient parking exists to support the large number of employees, customers, clients, concert goers and other visitors to the Fifth Avenue South Business Improvement District.

Considerations

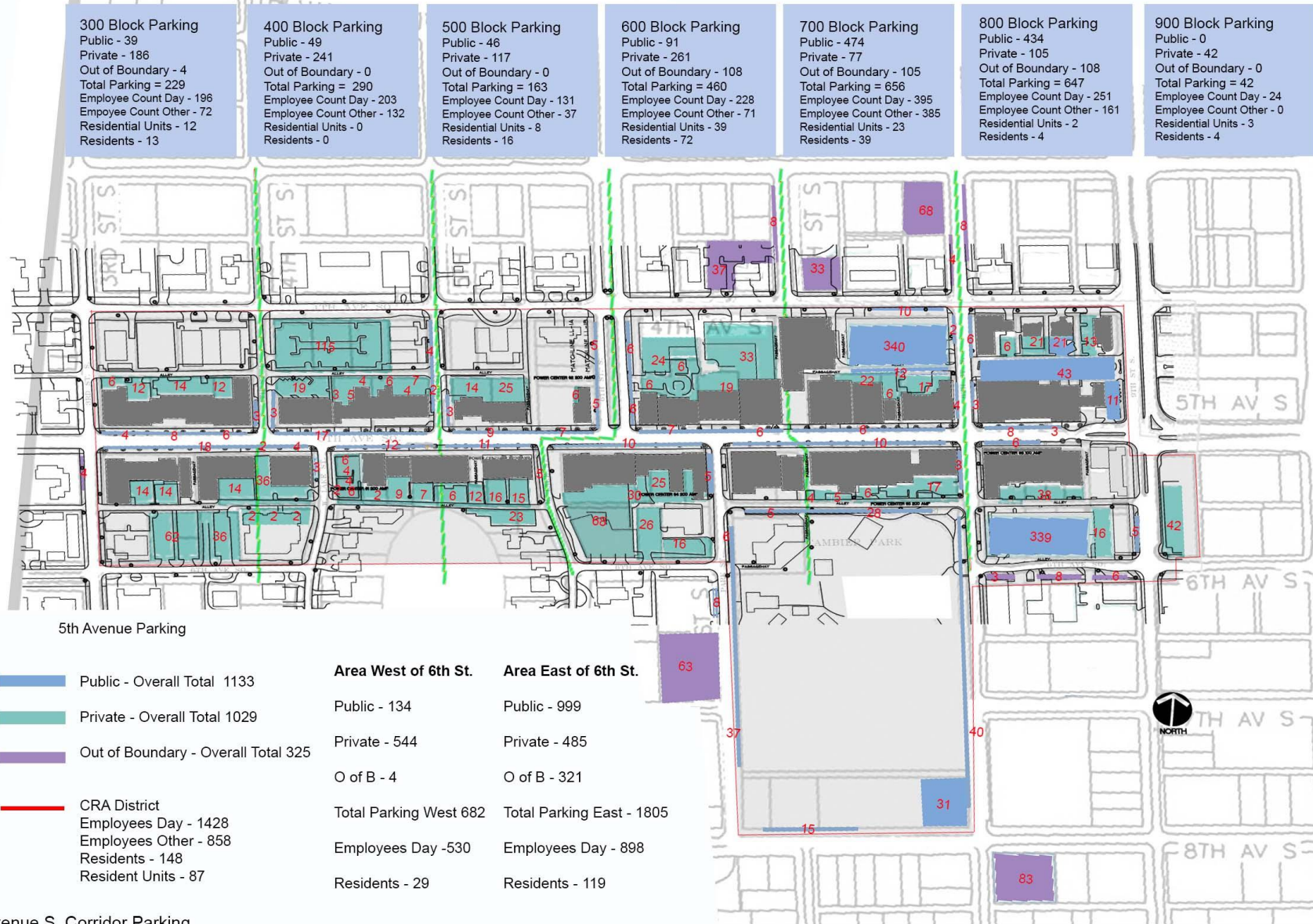
The extensive research done as a part of this study has concluded that insufficient parking exists to serve the district's many users.

We've ascertained that the current use of on-street parking spaces, at least in the majority of cases, is due to a lack of other parking options. Time-limits might remove the more blatant offenders, but would not solve the larger problem: Where should employees park?

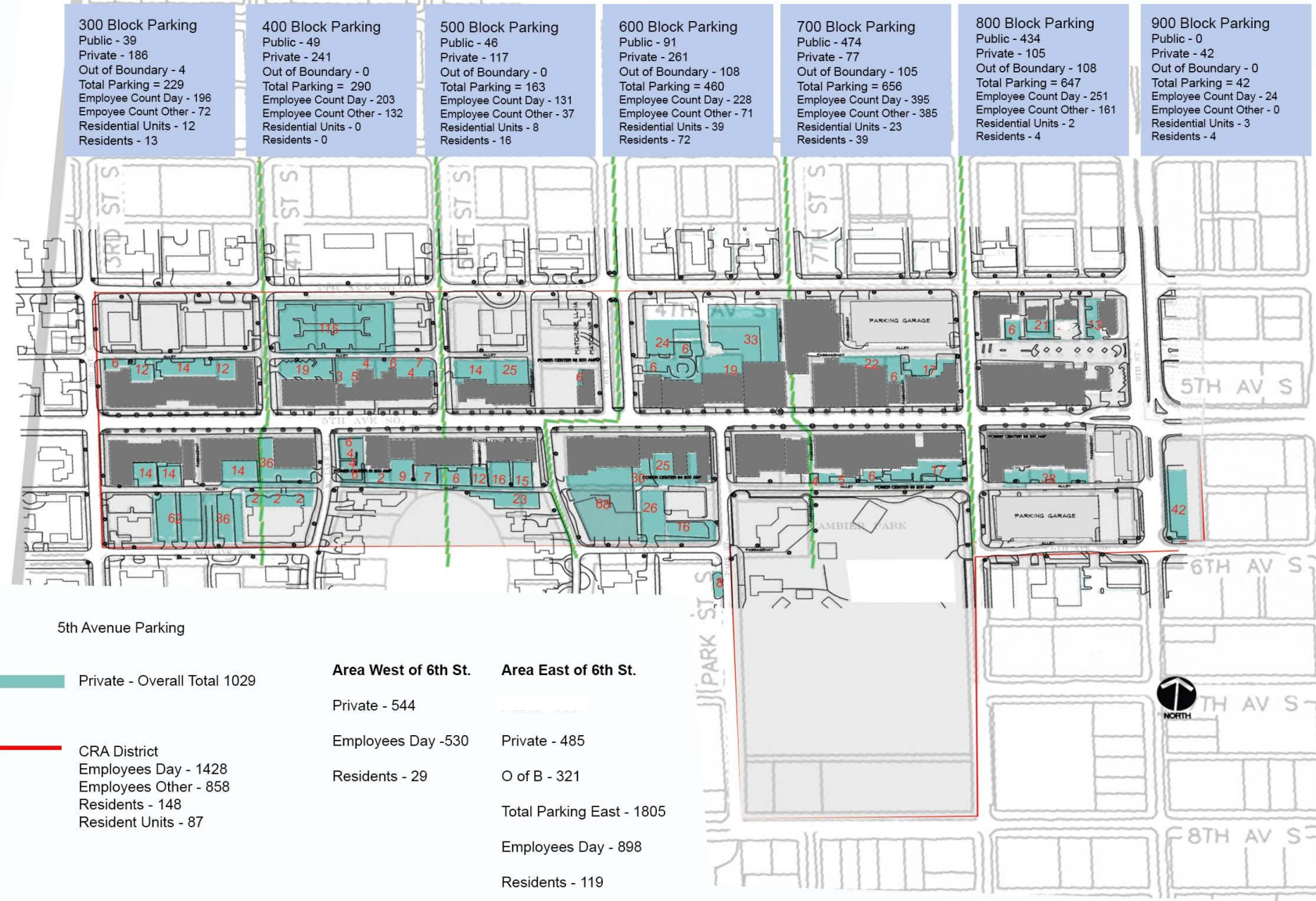
We offer the following to the City as considerations:

- Acquisition of property on the west end of the district for use as parking and eventual construction of a parking garage.
- Pursuit of shared and/or leased parking within and/or outside of BID district.
- Enforcement of existing two-hour time limits on the first floor level and ramps of the parking garages to allow for long-term customer use.
- Enhancement of parking directional signage (number, size, design) to better communicate parking options.
- Hiring of a parking professional to further assess the needs and opportunities impacting the BID district and downtown.

Map #1



Map #2



Map #3

300 Block Parking
Public - 39
Private - 186
Out of Boundary - 4
Total Parking = 229
Employee Count Day - 196
Employee Count Other - 72
Residential Units - 12
Residents - 13

400 Block Parking
Public - 49
Private - 241
Out of Boundary - 0
Total Parking = 290
Employee Count Day - 203
Employee Count Other - 132
Residential Units - 0
Residents - 0

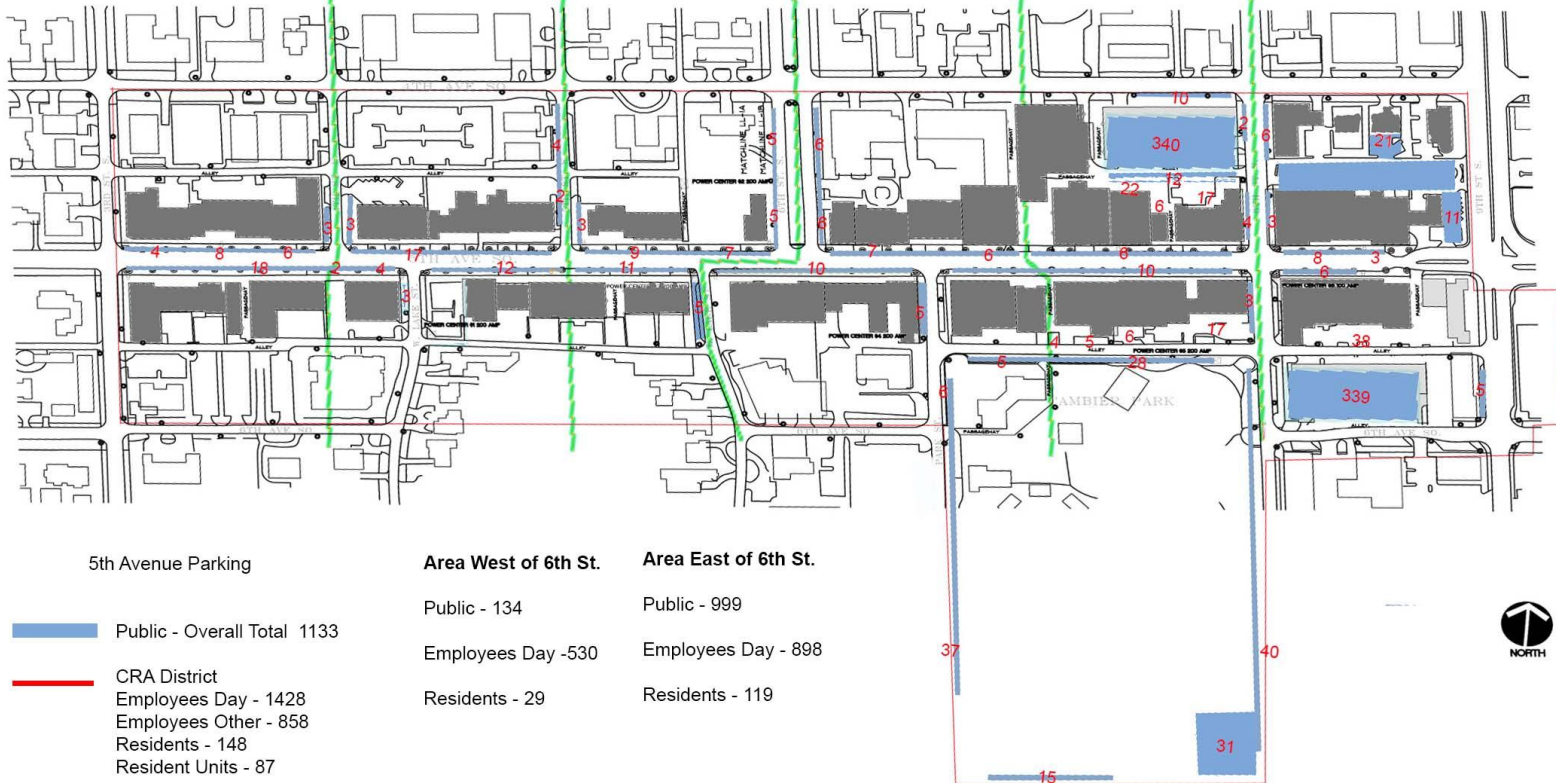
500 Block Parking
Public - 46
Private - 117
Out of Boundary - 0
Total Parking = 163
Employee Count Day - 131
Employee Count Other - 37
Residential Units - 8
Residents - 16

600 Block Parking
Public - 91
Private - 261
Out of Boundary - 108
Total Parking = 460
Employee Count Day - 228
Employee Count Other - 71
Residential Units - 39
Residents - 72

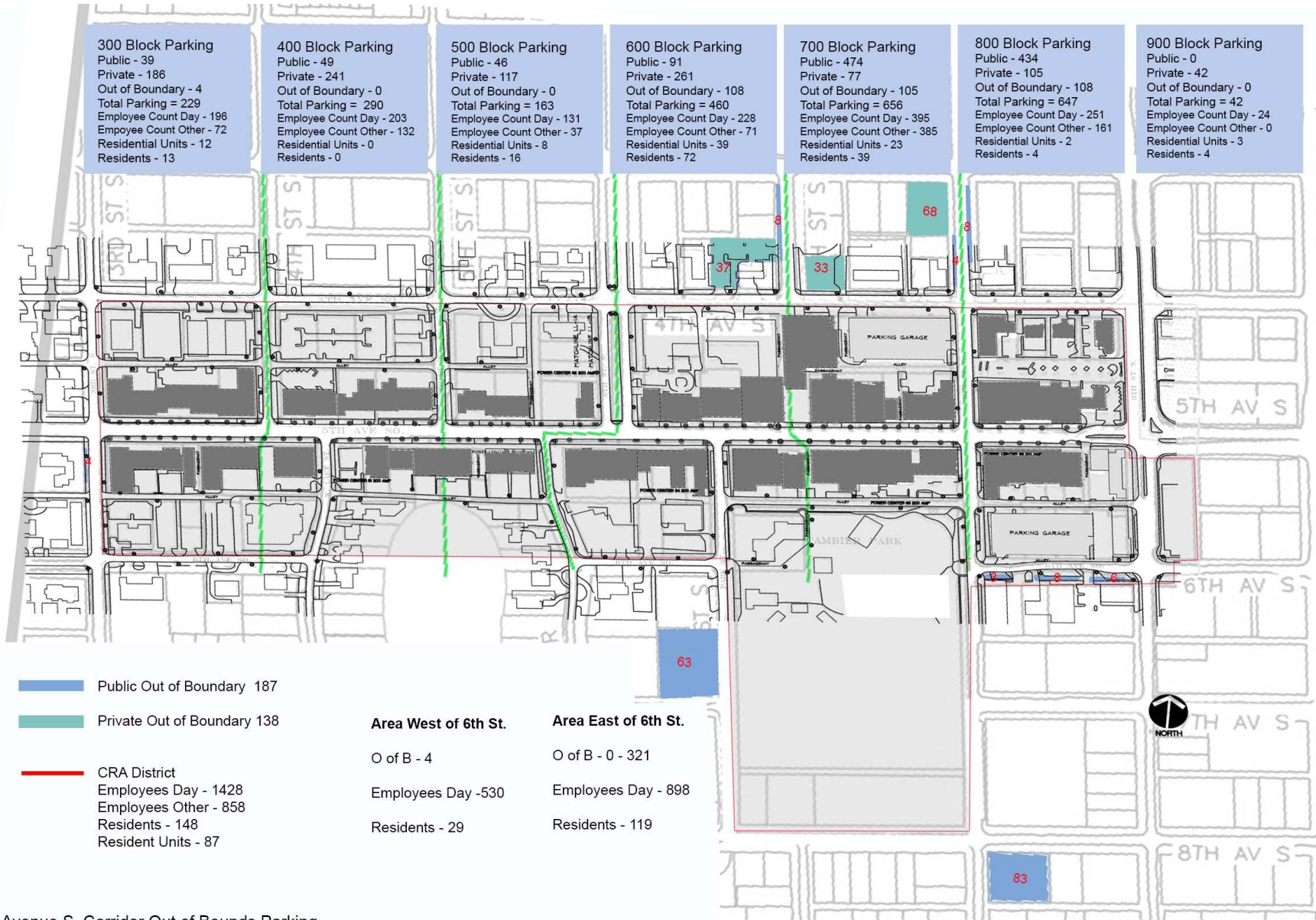
700 Block Parking
Public - 474
Private - 77
Out of Boundary - 105
Total Parking = 656
Employee Count Day - 395
Employee Count Other - 385
Residential Units - 23
Residents - 39

800 Block Parking
Public - 434
Private - 105
Out of Boundary - 108
Total Parking = 647
Employee Count Day - 251
Employee Count Other - 161
Residential Units - 2
Residents - 4

900 Block Parking
Public - 0
Private - 42
Out of Boundary - 0
Total Parking = 42
Employee Count Day - 24
Employee Count Other - 0
Residential Units - 3
Residents - 4



Map #4



Downtown as an Economic Engine

Over the past 40 years the traditional downtown—main street—has changed drastically. Threatened by suburbanization and the onset of the mall and box store generation, older downtowns weren't able to compete effectively in the changing market. Residents were leaving the comfort of the traditional downtown and moving out to suburbia. Exploiting this trend, the malls offered convenient near-residential shopping, newer more modern buildings, enclosed shopping free of issues with the weather, and seas of parking.

Stronger communities fought this trend and revived the traditional downtown. Naples main street—Fifth Avenue South—is one of those survivors. But, in recent years, new challenges have emerged. Competition is not just around the corner, it's global forcing even the traditional mall and shopping center model to evolve. Urban Lifestyle Centers are reaching for the attributes that make downtown special—the mixed-uses, the active street fronts. These centers may give the architectural feel of a “main street” but they have none of the heart, and none of the sense of place.

Naples Downtown, though, is more than just a sense of place. It is a tangible economic engine driving jobs and growth for the CRA and the City of Naples. Fifth Avenue South is a pivotal driver of that engine.

Over the past 20 years, Fifth Avenue South has re-invented itself into a premiere shopping, dining, cultural and performing arts destination in Southwest Florida. This transformation was not without a struggle.

As recently as 2009, the Avenue was suffering a first floor vacancy rate of 23 percent. Taking heed of the recommendations made by the Duany and Gibb's reports*, civic and community leaders moved forward with a number of initiatives aimed at growing and sustaining Fifth Avenue South. Chief among them was the formation of a business improvement district to manage and promote the district.

Today, with a rebounding economy and a strategic program of economic development, marketing and promotion, the Avenue is experiencing a renaissance. The once 23 percent vacancy rate has dwindled to the 4 percent range as once vacant spaces have been occupied by retail, restaurant and specialty services.

With a concentrated tax base of more than \$139 million, 211+ businesses and more than 1,428 daily employees, the Fifth Avenue South Business Improvement District, as an entity, plays a significant role in the Naples economy providing needed revenues to support the City and CRA's realization of community goals. This economic impact becomes even more significant when you take into consideration that the district is not yet fully leased. Some 30,000 square feet of office and retail space west of 6th Street has yet to be leased.

Now is not the time to take a back seat. Now is the time to put in place initiatives that will strengthen and sustain the district's ability to compete effectively in the changing marketplace, and ultimately preserve this critical source of revenue for the CRA and City of Naples.



**Four key studies were referenced in preparation of this report, 1994 Duany Master Plan, 2004 Duany Master Plan Update, 2008 Staff Parking Analysis for Fifth Avenue South, and the 2009 Market Analysis prepared by Robert Gibbs.*

Parking as an Economic Driver

- *After deducting the 1,428+ daily employees and 148+ residents, only 586 spaces are left of the district's total 2,162 public and private parking spaces for customers, clients, concert goers and other visitors to the Avenue.*

Throughout the evolution of downtowns, parking has been the one aspect that has confounded civic and community leaders alike.

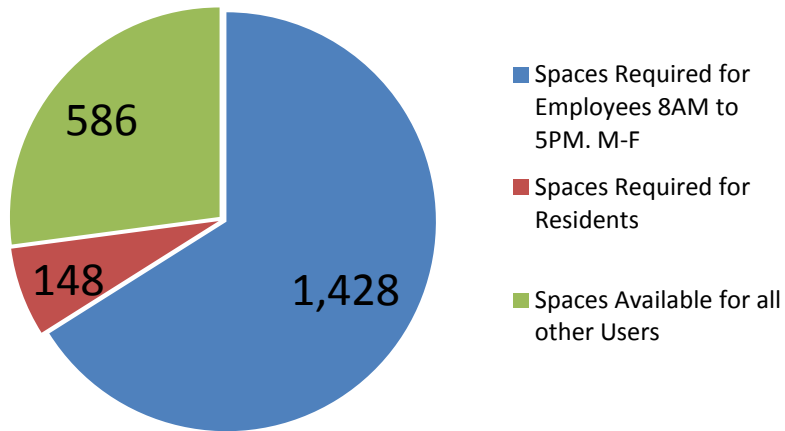
Numerous studies have shown that turnover, or lack of turnover, of public parking spaces in commercial areas with limited parking may have an economic impact on nearby businesses.

Some studies have gone so far as to attribute a dollar amount to on-street parking spaces in a traditional commercial district stating that one space, if turned over at least 8 times a day, can generate annual gross sales of \$200,000 for businesses along that street.

What we do know is that parking is only one component of a vibrant, healthy commercial and mixed-use business district. When included as part of an overall redevelopment strategy that includes a marketing and business development component, along with streetscape and urban design initiatives, parking becomes a vital asset and driver for economic success.

Parking is not just about cars. It is about people and getting people where they want and need to go. When people experience safe, convenient and efficient parking, they are more likely to have a positive overall feeling about the destination—and want to return.

**Parking Usage:
2,162 total parking spaces in
BID District**



The best way to impart that experience, according to the Urban Land Institute's 2010 edition of *Dimensions of Parking* is to implement a cognitive wayfinding system, "to guide patrons safely along a pleasant and efficient route—from roadway to parking space located as near as possible to the destination; from parking space to destination; from destination back to parking space; and from parking space back to roadway."

From a retailing perspective, the further goal is to entice the patron to prolong their stay and shop and dine beyond their initial plans.

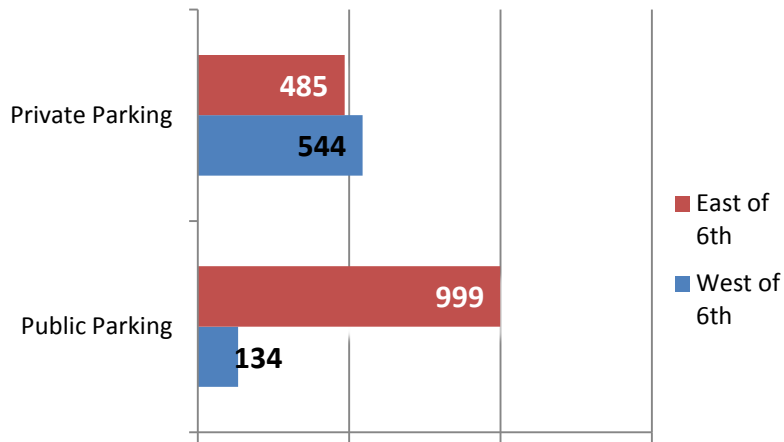
Wayfinding is especially critical in older, traditional downtown areas like Naples, where parking may be located down a side street, around the park, in the alley, or in the garage.

Parking to work, shop, dine and play along Fifth Avenue South is further complicated when you realize that adequate parking doesn't exist to meet the needs of the district's many users. After deducting the 1,428+ daily employees and 148+ residents, only 586 spaces are left of the district's total 2,162 public and private parking spaces for customers, clients, concert goers and other visitors to the Avenue. (See chart to the left).

Even taking into consideration the availability of 325 public and private spaces located outside, but nearby, the BID district, we still have only achieved 911 spaces for public use.

On-Street parking by employees, while not the preferred solution, seems in the majority of cases to be a symptom of the larger issue—lack of adequate parking.

Parking Configuration in BID District



The importance of parking as an asset and as a driver for economic success is best illustrated in comparing the disproportionate growth that has occurred between the east and west segments of the district.

As our surveys have shown, the majority of parking within the BID district is located east of 6th Street. With 1,484 parking spaces, this three block area has flourished in keeping with Duany's vision as a concentrated retail and cultural arts segment.

Unfortunately, the west end of the district has not had the same success. Today, only 678 parking spaces exist to support the more than 87 businesses, 530+ daily employees, residents and customers. (See chart to the left.)

Spurred by market forces, lower rental rates and the lack of concentrated public parking, a cluster of office and service uses have located along the first floor levels of the west end of the district creating dark spots and diminishing connectivity with the rest of the district.

Retail prospects today spurn the west end of the district, preferring to hold out for possible openings on the more lively east end. And, some 20,000 square feet in upper story office space sits vacant for lack of parking and vitality.

Still with these concerns, a strong restaurant segment has evolved on the west end. Building on the tenets of the Duany plan, outdoor dining, music and an ambient setting has created a walkable, fun and attractive niche allowing these restaurants to flourish.

The challenge today and into the future is how to sustain that vitality and realize the economic potential of the west end of the BID district without adequate parking.

Background & Data

Field Work

Outreach

Past Studies



Field Work

- *A disproportionate number of parking spaces are located to the east of 6th Street within the district.*
 - *Of the 1,133 public spaces in the district, only 134 are located to the west of 6th Street.*

Over a three-month period, the Avenue Enrichment Committee of the BID, with assistance from property owners and tenants within and outside the BID district conducted comprehensive surveys of existing parking, along with an inventory of employees and residents within the district. Additional surveying of parking was also conducted immediately outside the district boundaries.

The resulting work illustrates the need for additional public parking resources within the BID district.

The map on the following page lays out the current configuration of public and private parking within and immediately adjacent to the BID district.

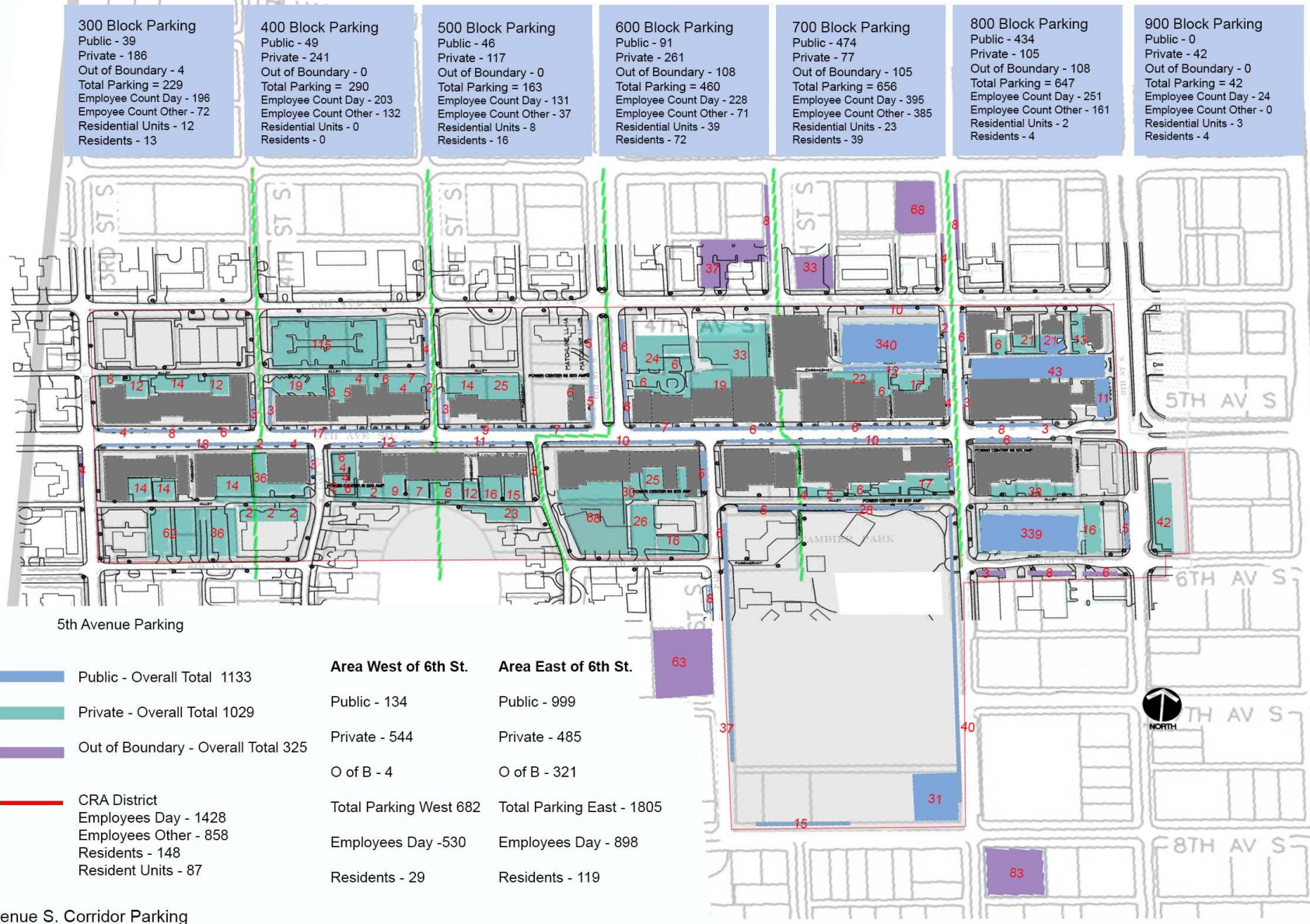
Comprehensive surveys identified a total of 2,162 parking spaces within the BID district. Those spaces are broken down as follows for a total of 1,133 public and 1,029 private spaces:

<u>Public spaces</u>	<u>Private Space</u>
Garage: 679	Lot: 1,029
Lot: 55	
On-street: 399	

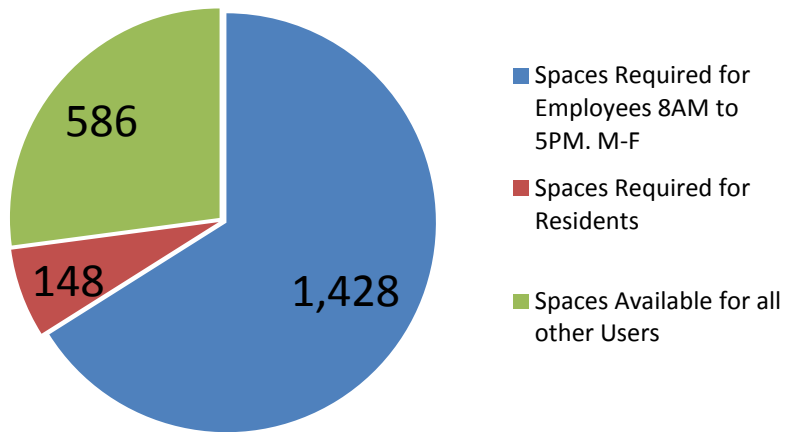
The surveys showed a disproportionate number of spaces were located to the east of 6th Street within the district. Of the 1,133 public spaces, only 134 are located to the west of 6th Street.

The disparity becomes even more evident when compared with the number of employees working within the district on a daily basis.

Map #1



**Parking Usage:
2,162 total parking spaces in
BID District**



Surveys were conducted to determine numbers of employees working within the BID district on a daily basis, Monday through Friday, between 8AM and 5PM. This timeframe was chosen to address morning, day and evening work shifts. The number of additional employees working “all other times,” including evening and weekend, was also surveyed.

In cases where time-frames overlapped, the lower number was used.

Findings showed that the district currently supports 1,428+ daily employees (8AM-5PM, M-F). Additional employees working evening or weekend hours included 858.

Of the 1,428 daily employees, 898 are employed east of 6th Street; and 530 are employed west of 6th Street.

Surveys of residential units and residents were also conducted. The district supports 87 residential units, and 148+ residents. Currently, not all residential units are occupied.

After deducting the 1,428+ employees and 148+ residents, only 586 spaces are left of the district’s total 2,162 public and private parking spaces for customers and visitors to the Avenue.

Surveys were also conducted of parking availability outside of the BID district, but near-by. Findings identified only 187 viable public spaces outside of the boundaries, and 138 private spaces. Even when taking these spaces into consideration, we still have only achieved 911 spaces for public use.

To determine the amount of overnight parking occurring within the district, the Naples Police Department conducted a night-time survey for a period of one week in March 2013, looking specifically at cars parked at 4:00 a.m. It is important to note that any weekend parking numbers would be impacted due to streets being blocked Friday through Sunday of the study week for the Downtown Festival of the Arts.

The survey indicated that overnight parking was occurring in the parking garages and on-street. Further research will need to be done to determine if these parkers are residents of the district or random occurrences.

	Number of Vehicles Parked at 4:00 AM						
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Date	3/18/2013	3/19/2013	3/20/2013	3/21/2013	3/22/2013	3/23/2013	3/24/2013
On 5th Avenue - 3rd Street to 6th Street	0	1	1	1	0	0	0
On 5th Avenue - 6th Street to 8th Street	6	4	5	7	0	0	4
On 5th Avenue - 8th Street to 9th Street	1	0	0	1	0	0	0
In Parking Garage - 4th and 8th	3	4	2	2	1	0	2
In Parking Garage - 6th and 8th	6	7	6	5	9	0	5
In Park Street Lot - 6th and Park	12	2	2	2	0	0	0
					Art Show	Art Show	
						5TH Ave S. Blocked	

Outreach

The Outreach component of the Study process included the following activities:

1. A series of district meetings, block meetings, forums and email surveys providing the maximum opportunity to businesses, property owners and residents within the district to share their concerns and suggestions regarding parking.
2. A review of best practices in comparable communities.

In March 2013, Mayor Sorey prepared a letter directed to business owners within Downtown Naples. The BID office distributed this letter to all business and property owners within the district.

This letter addressed the current review of the City's parking regulations. The letter also addressed Council's concern that staff of area businesses may be parking in on-street spaces and asked for feedback regarding the potential for time-limit parking regulations.

As this report will indicate, the amount and accessibility of parking has a direct impact on redevelopment and sustainability of the Fifth Avenue South district.



Starting in February, in anticipation of Council's discussion regarding parking regulations, the BID began soliciting comments and suggestions from BID members.

Input was solicited during the BID's District Meetings, Block Meetings, and Forums, and through email requests.

The majority of respondents were against meters and other parking regulatory tools noting that enacting such restrictions would negatively impact 5th Avenue's ability to compete effectively in the downtown and greater Naples market. Many shared examples of shoppers who would spend three to four hours in the district shopping, dining and browsing.



Respondents also offered several suggestions for maximizing and managing existing resources including providing more and better signage to indicate where public parking is located, identification of specific areas for employee parking, and encouraging business owners to educate employees on parking options.

Chief among all recommendations was the need for an additional parking garage on the west end of the district to support both employee and customer parking needs.

In addition to local outreach, contact was also made with several comparable communities to identify best practices being used in managing downtown parking. All were facing similar challenges in their downtowns.



Coral Gables offered two programs which could be applicable to Naples:

1. The City of Coral Gables operates two garages outside of the downtown district which are used primarily by employees. The City also provides a trolley service to transport the employees to the downtown for work.
2. The City of Coral Gables also operates a centralized valet system. Two valet stations are located on street with supervisors and radio communication. Cars can be dropped off at one location and then delivered to the other station for pick up, keeping the process moving efficiently.



Further research could yield additional best practices that might aid in the management of downtown parking in Naples.

Past Studies

In 1994, civic and community leaders recognized the need to address challenges impacting Fifth Avenue South's ability to compete more effectively in the changing marketplace. Through their efforts, celebrated urban planner and architect Andres Duany was commissioned to develop a cohesive plan for the Fifth Avenue South district. His vision and Naples leaders' willingness to act transformed the Avenue into one of Southwest Florida's premier shopping, dining and performing arts destinations.

Duany's vision included several critical components that when implemented together would reposition Fifth Avenue South to meet and exceed market challenges. This included physically transforming the street to support a vibrant mixed use framework of ground floor retail and restaurant uses, second floor office and third floor residential. Enhanced landscaping and streetscaping combined with outdoor dining to create an overall experience and ambience. Critical to this transformation was the need for structured and dedicated parking to guide and support redevelopment.

Specific to parking, the plan recommended:

- Construction of four strategically placed public parking garages—2 on the east end, one in the middle, and one on the west end.
- Combination of key private parking lots as shared parking to support day/night uses.
- Color coding of tenant specific parking
- Buffering of rear parking areas with attractive landscaping
- Consideration of angle or head in parking for Park Street; and the
- Consideration of striping (at the time re-striping) to gain more on-street spaces

Four key studies were referenced in preparation for this report, 1994 Duany Master Plan, 2004 Duany Master Plan Update, 2008 Staff Parking Analysis for Fifth Avenue South, and the 2009 Market Analysis prepared by Robert Gibbs.

Information from these studies was used to provide a foundation for the current review and analysis.

A joint partnership of property owners and the City of Naples worked in concert to construct the first parking garage at 4th Avenue South and 8th Street South. A second garage was constructed in 2009 at 6th Avenue South and 8th Street using funds from the Community Redevelopment Agency (CRA) Tax Increment Financing fund.

To further facilitate redevelopment occurring, a program of “first come, first serve” was instituted to allow developers to get on-street parking credits toward development.

The parking garage and developer incentives had a tremendous impact and catalyzed redevelopment occurring at a fast pace for the first few years of the program. In 2004, Andres Duany was asked to return to assess the district's progress and make updates as necessary to the plan.

His review noted a direct correlation between the success and vibrancy of the east end of the district with the construction of the first garage. Pedestrian and “retail flow,” he observed, “stopped at 5th Street heading west.” He recommended the City move forward with the west end garage to catalyze redevelopment and economic vibrancy.

He also observed the growth in the office industry and that their use of primary first floor level spaces created a “boring experience” for the pedestrian contributing to the lack of connectivity along the Avenue. Office parking lots, he noted go “unused by shoppers” and could be used in the evenings to support shopping and dining in the district.

Today, offices are the primary use within the BID district with more than 80 locations supporting banking, financial services, real estate, law, architecture and other professional offices.



The 2004 update recommended that the City move forward with construction of the remaining garages with specific emphasis on the need to catalyze the west end.

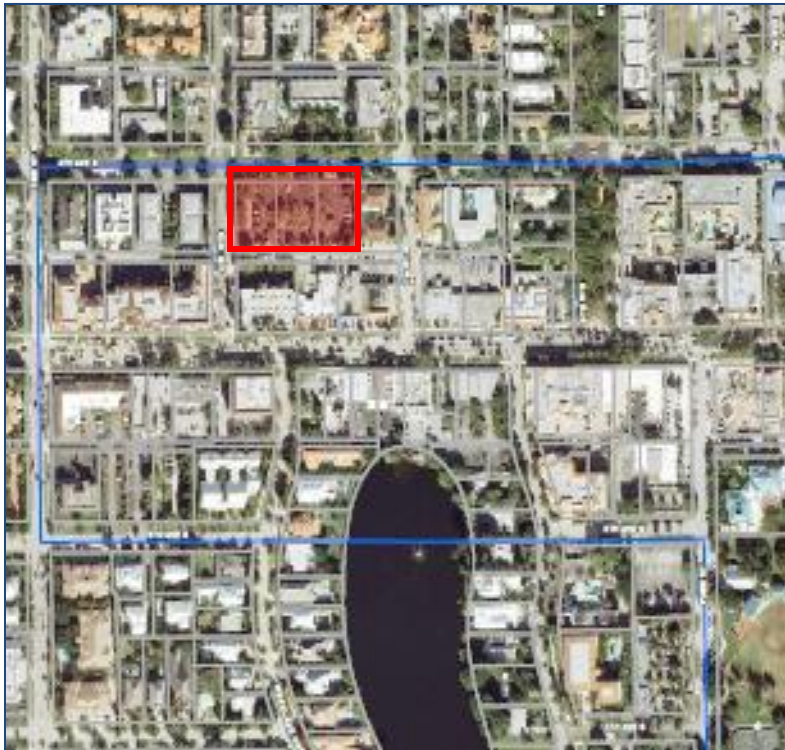
Duany's update also recommended, as a short-term solution, that consideration be given to re-designing privately owned rear surface parking lots on the south side of the 400 block into one large efficient lot. This, he noted, could be done by the city laying easement over the smaller lots and redesigning them for maximum efficiency.

In 2008, City Planning Staff conducted an analysis of parking in the Fifth Avenue South Special Overlay district that addressed the allocation of parking from the on-street parking reserve, the distribution of spaces from the existing garage, and the number of spaces required to support build out in the district. This study recommended the following:

1. Developers should be required to maximize on-site parking and not obtain their total parking requirement from the reserve.
2. Reinco property on the northside of 6th Avenue South should be pursued for public parking at the west end of the Avenue. The Woman's Club property is another possible location.
3. City should negotiate an inter-connected parking lot (as recommended by Andres Duany) on the 400 Block to be maintained by the City in return for some relaxation of the parking requirements.
4. Parking should not be restricted for use by individual businesses or buildings
5. Once parking reserves are depleted, the City should continue to collect payment in lieu of parking to supplement the acquisition and construction of new structured parking.



Reinco Lot (300 Block), proposed shared parking (400 Block); and Woman's Club properties.



Lot at 4th Avenue South and 4th Street South

At the time of the 2008 Staff study, the parking garage at 6th Avenue South and 8th Street South had not yet been built. Staff had identified the Reinco property as the only available property on the west end for acquisition to support public parking. The Reinco property is no longer available.

Andres Duany, in his *2004 Update*, was the first to identify the property at 4th Avenue South and 4th Street as the ideal site for west end public parking. At the time of the staff study, a development plan had been approved for the site. That site today is available and has been recommended to the City for acquisition.

City staff's 2008 study also identified the Woman's Center lot as a potential site for acquisition to support public parking. Mayor and Council moved forward with approving acquisition of this lot in 2012 providing 63 additional public spaces to serve Cambier Park and Fifth Avenue South.

In 2009, business leaders commissioned Gibbs Planning Group, Inc. to conduct a retail market analysis of the Fifth Avenue South District. This report identified that the district was facing several major challenges that were threatening its growth and sustainability. Chief among them was the state of the economy. The report also identified several non-market factors contributing to declines in its commercial market share including ineffective marketing programs, parking management, restrictive public policies and uncoordinated leasing efforts.



These challenges were contributing to a first floor vacancy rate of 23 percent. His findings noted that the Fifth Avenue market could support 143,000 square feet of additional retail and restaurant space by the year 2010.

The report went on to identify several strategies for enhancing the commercial sustainability of the Avenue. Principal among them was the implementation of a Business Improvement District to manage and promote the area. He further recommended improvements to landscaping, lighting, parking design and streetscape amenities. And, in keeping with the Duany reports, he encouraged more outside dining areas and live entertainment for restaurants.

With regard to parking, the Gibbs report made several observations and recommendations. He encouraged business owners and employees to park in the garages to free up on-street spaces; and the consideration of a pilot program to test parking meters along a representative block to measure the "effectiveness of improved shopper parking in relation to retail sales."

It is important to note that the Gibb's Report did not inventory the existing spaces available, nor the number of employees working within the district.

The information contained in these reports has been used to provide a foundation for this study. Along with the further research and data findings, this information was used in formulating the final conclusions and considerations presented in this study.

