City of Jacksonville, Florida

Downtown Public Parking Strategy and Implementation Plan

Jacksonville, FL

Final Report

March 20, 2019

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March 20, 2019

Mr. Guy Parola, AICP
Operations Manager
Downtown Investment Authority
117 W. Duval Street, Suite 310
Jacksonville, FL 32202

Mr. Robert Carle
Parking Manager

RE: Downtown Public Parking Strategy and Implementation Plan
Final Report
Jacksonville, Florida

Dear Mr. Parola:

We are pleased to issue the Final Report for Task I of our parking study. Thank you for allowing TimHaahs to work with the City on this important project.

Very truly yours,

Vicky Gagliano, MBA, LEED AP, CPP
Project Manager, Director of Parking Studies

Michael D. Martindill
Principal

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Introduction

Timothy Haahs & Associates, Inc. (TimHaahs) has teamed with Newtown Advisors, KLAS Global, and SP+ (the TimHaahs Team) to perform a downtown public parking strategy and implementation plan for the City of Jacksonville's Downtown Investment Authority (DIA) and the Office of Public Parking. This Draft Report addresses Task 1, the Downtown Parking Strategy and Implementation Plan.

Task 1 – Downtown Parking Strategy and Implementation Plan

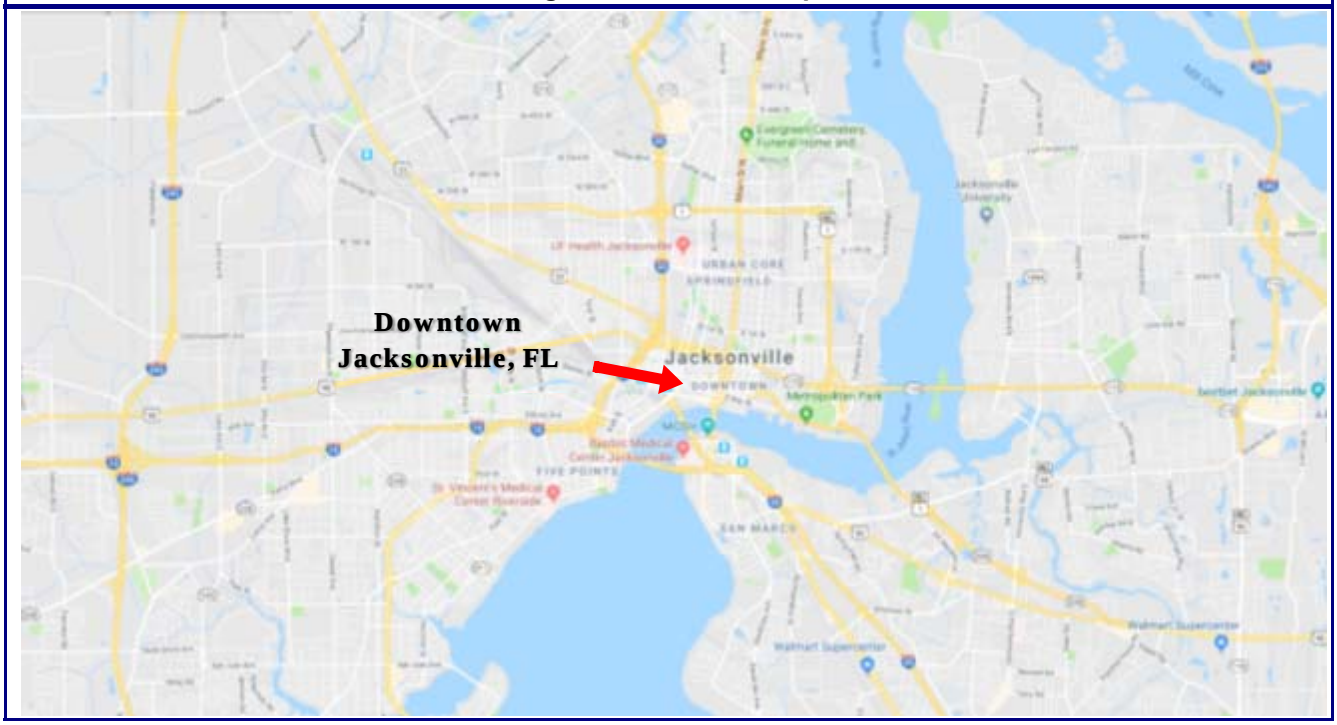
In summary, the three primary goals of this task are as follows:

1. Understand the current downtown parking conditions or parking adequacy (i.e., surplus vs. shortage).
2. Estimate the future downtown parking conditions or parking adequacy (surplus vs. shortage).
3. Provide recommendations on how to mitigate current and projected future parking shortages, maximize the efficiency of the current parking system, and best practices that will lead to improvement of the overall management and operation of the parking system.

Study Area

The study area is roughly a 300-block area surrounding Downtown Jacksonville, which has been divided by eleven separate sub-areas. An overview map, as well as a detailed downtown map indicating the boundaries of each of the sub-areas, is provided below and on the following page.

Figure 1: Overview Map



Source: Google Maps and Timothy Haahs & Associates, 2019

Figure 2: Downtown Study Area Map with Sub-Areas

Source: Google Earth and Timothy Haahs & Associates, 2019

As shown in the above map, the study area was further divided into smaller sub-areas which allowed us to focus on individual districts and the unique characteristics and challenges faced within that specific district.

Scope of Work

The study is based on the following scope of services:

1. Inventory publicly and privately-owned/managed, on- and off-street parking facilities that are available for general public use.
2. Catalog buildings with known or reported parking deficiencies.
3. Perform multiple parking occupancy counts on all on- and off-street facilities identified in #1.
4. Identify future, proposed, or ongoing development plans by land use, location, size (square footage, residential units, etc.), and completion horizon (i.e., one to two years, three to five years, etc.).
5. Compare hourly, daily, and monthly rates against other downtowns of similar character.
6. Conduct stakeholder and subject matter expert interviews.
7. Calculate and compare current parking demand with the current parking supply, identifying surpluses and deficiencies.
8. Calculate and compare the estimated future parking demand with the estimated future parking supply, identifying surpluses and deficiencies by completion horizon (i.e., one to two years, three to five years, etc.).
9. Review the existing ordinances governing parking and regulations and provide recommendations that will allow the City to meet their objectives for future downtown economic development.

Task 1 – Downtown Parking Strategy & Implementation

We know that mobility is evolving daily with the introduction of electric bicycles, Uber and Lyft, electric scooters, and eventually, autonomous vehicles. With each evolution, the number of single-occupant vehicle trips has decreased. While we know that mobility is changing, the speed of the change is unknown, leaving municipal leaders in a grey area of unknown future parking needs. In addition, the established monthly parking rate does not provide sufficient revenue to support the operation and debt service associated with a new parking garage. Therefore, it is even more critical that cities maximize the use of all parking assets and exercise conservative fiscal policies when investing in new parking assets, particularly parking garages.

2018 Parking Conditions

Current Parking Supply

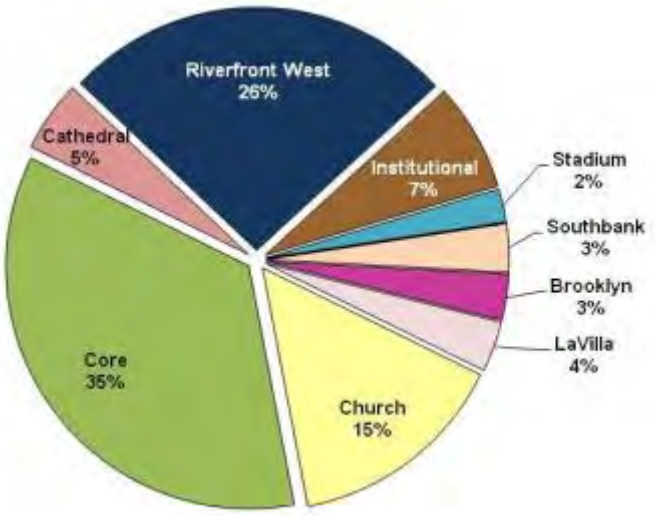
Our team examined the on- and off-street parking facilities that currently exist in downtown Jacksonville. In order to better understand the public parking conditions, we examined the public on-street parking areas, the public off-street parking facilities, and the private off-street parking facilities that allowed for general public hourly (transient) or monthly (permit) parking. We also examined several private parking facilities that were associated with large buildings to better understand their current utilization. The figures listed in this section are representative of May 2018 conditions during the time of our site visit.

On-Street Parking Supply

At the time of this study, the City provided our team with information on the parking equipment currently installed. Our team inventoried 1,662 on-street parking spaces within the entire study area. The Core sub-area contained 35% of the on-street spaces, while the Riverfront West and Church sub-area contained another 26% and 15%, respectively. The remaining 24% of the on-street parking spaces are located in the Church, Institutional, Cathedral, LaVilla, Brooklyn, and Southbank sub-areas. Our team did not identify any on-street parking locations in the River Park or Riverfront East sub-areas. The following table summarizes the current on-street parking supply by sub-area.

Table 1: 2018 On-Street Parking Supply by Sub-Area

	ON STREET	
SUB-AREA	BLOCKS	SPACES
LaVilla	8	56
Church	39	245
Core	102	587
Cathedral	15	79
Riverfront West	71	434
Institutional	13	120
Stadium	4	37
River Park	0	0
Riverfront East	0	0
Southbank	6	53
Brooklyn	12	51
TOTAL	**270**	**1,662**



Source: Timothy Haahs & Associates, 2019

A majority of the on-street parking spaces are metered, with the exception of several locations in the LaVilla and Southbank sub-areas. Most metered spaces have a maximum time limit of one (1) or two (2) hours with the exception of some 30-minute spaces in high-turnover areas and some four- and ten-hour spaces which allow for longer visits or employee usage.

Again, all meters accept coin and many of those located in high-usage areas also accept credit card payments. The on-street meter rate is currently $0.50 per hour. Along with the previously discussed recommendation of increasing the on-street hourly rates, **we recommend increasing the hours of enforcement as development occurs and evening and weekend demand increases**.

Off-Street City-Owned Public Parking Supply

The City owns and operates 3,225 public parking spaces within their four (4) parking garages and two (2) surface parking lots as listed below.

Table 2: 2018 City-Owned Off-Street Parking Supply

CITY OWNED PARKING			HOURS OF	PARKING RATES	
FACILITY NAME	SUB-AREA	SPACES	OPERATION	HOURLY	MONTHLY
Water Street Garage	Core	1,497	M-F 6:30A-6P	$1.00/hr; $7.00 max	$50.00 + tax
Library Garage	Core	626	M-F 6A-7:30P; Sat 10:30A-7:30P	$3.00/hr + $2.00/hr up to $10.00; $3.00 after 5pm/weekends	$64.00 + tax
Ed Ball Garage	Core	340	M-F 7:45A-6P	$1.00/hr; $7.00 max	$80.00 + tax
Yates Garage	Riverfront W.	626	M-F 7A-6P	$1.00/hr; $7.00 max	$50.00 + tax
Forsyth Street Lot	Core	88		n/a - monthly card access only	$80.00 + tax
Bay & Ocean Lot	Riverfront W.	48		n/a - monthly card access only	$50.00 + tax
TOTAL		3,225			

Source: Timothy Haahs & Associates, 2019

There is an agreement, dated October 22, 2015, in place which allows Citizens Property Insurance Corporation “Citizens” a right to use up to 850 parking spaces within the 1,497-space Water Street Garage by use of a five-year license. As part of that license, the Licensee agrees to pay the city $45.00 per month per access card issued plus $4.50 for each un-used parking space (of the 850) and all rates are adjusted annually by the lesser of the change in CPI index or 3% of the annual rent amount. In addition, the agreement may be extended for five additional years pending mutual agreement. This agreement will expire on October 22, 2020. We recommend evaluating any requests for a renewal or new agreements based on the market rates and conditions at that time.

There is also an agreement, dated November 18, 2014, between the City and the Jessie Ball DuPont Fund which allows parking for up to 200 vehicles at the Yates Building Garage (150 vehicles on a monthly basis and 50 vehicles on a voucher basis) at no cost for a period of five years, ending March 21, 2020. An amendment to the original agreement, dated October 10, 2015, provided an additional 50 spaces and extended the term of the agreement to December 31, 2020. The additional spaces will accommodate the tenants in the former Haydon Burns Library building. Upon expiration, we do not recommend any additional agreements that would allocate parking, at no cost, within a City parking facility.

Along with the previously discussed recommendation of increasing the monthly rates, there may be an opportunity to increase the hours of operation in the future. **We recommend monitoring the evening and weekend parking demand surrounding each facility in order to gauge the benefit of extended hours of operation.**

Off-Street Privately-Owned Parking Supply

We reviewed all of the data collected on private parking areas and after eliminating the facilities that are either fully private, cater to one specific private use, or are unpaved, there are 39 privately-owned parking facilities available for general public use. Within those 39 facilities are approximately 10,752 spaces, some of which may be encumbered by monthly permit holders and, therefore, the full number of parking spaces listed may not actually be available to the general public on a daily basis.

Table 3: 2018 Privately-Owned Off-Street Parking Supply

PRIVATELY OWNED OFF-STREET		
SUB-AREA	**LOCATIONS**	**SPACES**
LaVilla	2	303
Church	4	119
Core	7	2,904
Cathedral	5	254
Riverfront West	6	1,685
Institutional	1	42
Stadium	10	4,542
River Park	1	84
Riverfront East	1	621
Southbank	1	169
Brooklyn	1	29
TOTAL	**39**	**10,752**

Source: Timothy Haahs & Associates, 2019

We understand that the City has an on-going agreement with Metropolitan Parking Services (MPS) which controls parking assets in the Stadium sub-area. As part of this agreement, the City is obligated to subsidize the Arena and Sports Complex Parking Garages. Given the large number of underutilized parking assets located at the Stadium Sub-Area, **we recommend activating those parking facilities (along with other surface parking lots) into economy parking facilities** to support downtown employees, customers, and courthouse jurors. As part of activating these parking facilities, and in order to make them a viable daily parking option, **we recommend the implementation of a downtown circulator or shuttle** that would connect the new parking facilities with downtown.

Current Parking Demand and Occupancy

The TimHaahs team physically counted the number of vehicles parked in all parking areas throughout the day during our visit on Tuesday, May 8th, Wednesday, May 9th, and Thursday, May 10th, 2018.

On-Street Parking Demand and Occupancy

The following table outlines the on-street parking demand and occupancy.

Table 4: 2018 On-Street Parking Demand and Occupancy by Sub-Area (May 8-10, 2018)

ON STREET		PARKING DEMAND			PARKING OCCUPANCY		
SUB AREA	SPACES	9A-11A	1P-3P	5P 7P	9A-11A	1P-3P	5P 7P
LaVilla	56	30	27	17	54%	48%	30%
Church	245	133	126	71	54%	51%	29%
Core	587	511	515	268	87%	88%	46%
Cathedral	79	23	32	18	29%	41%	23%
Riverfront West	434	214	164	153	49%	38%	35%
Institutional	120	74	93	39	62%	78%	33%
Stadium	37	0	1	28	0%	3%	76%
River Park	0	0	0	0			
Riverfront East	0	0	0	0			
Southbank	53	9	15	7	17%	28%	13%
Brooklyn	51	35	34	27	69%	67%	53%
TOTAL	**1,662**	**1,029**	**1,007**	**628**	**62%**	**61%**	**38%**

Source: Timothy Haahs & Associates, 2019

We observed a peak-hour demand of 1,029 vehicles parked in the 1,662 surveyed on-street meter spaces within the study area between 9am and 11am which is a common peak hour in central business districts throughout the U.S. While this represents an average occupancy of 62% for the entire survey area, the specific occupancy for each sub-area should be noted. As expected, the parking occupancy in the Core sub-area was observed consistently above 85% throughout the day and business hours.

One main reason for the high utilization of the on-street parking spaces is due to the current pricing structure. At the time of our data collection, the cost to park at an on-street metered space was considerably less expensive than parking in one of the off-street public or private parking lots and garages. Due to the price differential between the on-street and off-street parking facilities, motorists would rather search for a less expensive and more convenient on-street parking space instead of parking in a more expensive and less convenient off-street parking facility. The current downtown pricing structure is similar to if the Jacksonville airport charged more for their remote economy lot than their garage that is located right next to the terminal – everyone would be crowding into the garage.

Best practices in the parking industry dictate that the on-street parking spaces are the most valuable asset in the system. As such, the parking rates at the on-street meter locations should be priced high enough to encourage turnover which enables those parking spaces to be utilized by many different users throughout the day. In many cases, maximum time limits are also utilized (as in Jacksonville) to discourage long-term users from parking in the most valuable parking spaces. The other benefits of properly pricing the parking assets is that it discourages motorists from excess driving and "circling" the blocks in search of a vacant on-street parking space. Removing vehicles from the roadways and converting the motorists to pedestrians as quickly as possible reduces the number of potential vehicular-pedestrian conflicts, reduces carbon emissions, and increases pedestrian activity (which in turn improves overall safety and the economic vitality of the local businesses).

Off-Street City-Owned Public Parking Demand and Occupancy

Within the City-owned facilities, we observed a peak-hour demand of 2,225 vehicles which represents a peak-hour occupancy of 69 percent. The following table outlines the City-owned off-street parking demand and occupancy.

Table 5: 2018 City-Owned Off-Street Parking Demand and Occupancy by Facility (May 8-10, 2018)

CITY OWNED PARKING			PARKING DEMAND			PARKING OCCUPANCY		
FACILITY NAME	SUB-AREA	SPACES	9A-11A	1P 3P	5P 7P	9A-11A	1P-3P	5P 7P
Water Street Garage	Core	1,497	1,130	1,129	216	75%	75%	14%
Library Garage	Core	626	332	339	102	53%	54%	16%
Ed Ball Garage	Core	340	271	261	40	80%	77%	12%
Yates Garage	Riverfront W.	626	398	421	99	64%	67%	16%
Forsyth Street Lot	Core	88	26	28	8	30%	32%	9%
Bay & Ocean Lot	Riverfront W.	48	31	47	55	65%	98%	115%
TOTAL		**3,225**	**2,188**	**2,225**	**520**	**68%**	**69%**	**16%**
	Core	2,551	1,759	1,757	366	69%	69%	14%
	Riverfront W.	674	429	468	154	64%	69%	23%

Source: Timothy Haahs & Associates, 2019

Off-Street Privately-Owned Parking Demand and Occupancy

The following table outlines the privately-owned (and available for general public use) off-street parking demand and occupancy.

Table 6: 2018 Privately-Owned Off-Street Parking Demand and Occupancy (May 8-10, 2018)

PRIVATELY OWNED OFF-STREET			PARKING DEMAND				PARKING OCCUPANCY		
SUB-AREA	LOCATIONS	SPACES	9A 11A	1P-3P	5P 7P	OFF STREET	9A-11A	1P-3P	5P 7P
LaVilla	2	303	32	35	22	LaVilla	11%	12%	7%
Church	3	119	127	118	76	Church	107%	99%	64%
Core	7	2,904	1,585	1,612	560	Core	55%	56%	19%
Cathedral	5	254	187	206	74	Cathedral	74%	81%	29%
Riverfront West	6	1,685	543	678	295	Riverfront West	32%	40%	18%
Institutional	1	42	28	41	14	Institutional	67%	98%	33%
Stadium	10	4,542	312	337	326	Stadium	7%	7%	7%
River Park	1	84	0	3	0	River Park	0%	4%	0%
Riverfront East	1	621	0	0	8	Riverfront East	0%	0%	1%
Southbank	1	169	15	68	72	Southbank	9%	40%	43%
Brooklyn	1	29	29	10	10	Brooklyn	100%	34%	34%
TOTAL	**38**	**10,752**	**2,858**	**3,108**	**1,457**	**TOTAL**	**27%**	**29%**	**14%**

Source: Timothy Haahs & Associates, 2019

Within the privately-owned facilities, we observed a peak-hour demand of 3,108 vehicles, which represents a peak-hour occupancy of 29 percent. As previously mentioned, it is likely that a portion of the available parking spaces are already sold as monthly parking. In addition, the total occupancy is impacted by the 4,000+ paved parking areas near the stadium that are not as proximate as other facilities located closer to the core but included in the analysis.

Effective Parking Supply

Prior to calculating the parking adequacy (surplus or shortage), a cushion is applied to the parking supply in order to compensate for misparked vehicles, spaces lost due to maintenance or construction, and the flow of vehicles in and out of parking spaces. After the cushion has been applied to the parking supply, the result is the effective parking supply or how many spaces can 'effectively' be utilized at one point in time within a parking system. Industry standards typically apply an effective supply factor of 0.85 and 0.95 (a cushion between five and 15 percent).

For the purpose of this study, we have applied a factor of 0.85 to all on-street parking facilities as they are distributed throughout the study area. The last few vacant spaces are more difficult to locate with the number of one-way streets; motorists tend to circle their destination anytime the on-street parking system is operating above 85% occupied. The resulting total effective supply of the on-street parking spaces is 1,412 effective spaces (a 249-space reduction) as summarized in the following table.

Table 7: 2018 On-Street Parking Effective Supply by Sub-Area

ON STREET SUB-AREA	SPACES	EFFECTIVE SUPPLY FACTOR	EFFECTIVE SUPPLY
LaVilla	56	85%	48
Church	245	85%	208
Core	587	85%	499
Cathedral	79	85%	67
Riverfront West	434	85%	369
Institutional	120	85%	102
Stadium	37	85%	31
River Park	0	85%	0
Riverfront East	0	85%	0
Southbank	53	85%	45
Brooklyn	51	85%	43
TOTAL	**1,662**		**1,413**
		Reduction	*249*

Source: Timothy Haahs & Associates, 2019

We applied an effective supply factor of 90% to all off-street city-owned parking facilities, which results in an effective supply of 2,909 spaces, or a reduction of 316 spaces. The following table summarizes the effective supply calculations.

Table 8: 2018 City-Owned Off-Street Effective Parking Supply

CITY OWNED PARKING			EFFECTIVE	EFFECTIVE
FACILITY NAME	SUB-AREA	SPACES	SUPPLY FACTOR	SUPPLY
Water Street Garage	Core	1,497	90%	1,347
Library Garage	Core	626	90%	563
Ed Ball Garage	Core	340	90%	306
Yates Garage	Riverfront W.	626	90%	563
Forsyth Street Lot	Core	88	95%	84
Bay & Ocean Lot	Riverfront W.	48	95%	46
TOTAL		**3,225**		**2,909**

Core	2,551	2,300
Riverfront W.	674	609

Reduction	*316*

Source: Timothy Haahs & Associates, 2019

Finally, we applied an effective supply factor of 85% to all off-street, privately-owned parking facilities to account for monthly permit holders that were not present during our visit. This results in an effective supply of 9,139 spaces, or a reduction of 1,613 spaces. The following table summarizes the effective supply calculations.

Table 9: 2018 Privately-Owned Off-Street Effective Parking Supply

PRIVATELY OWNED OFF-STREET		EFFECTIVE	EFFECTIVE
SUB AREA	SPACES	SUPPLY FACTOR	SUPPLY
LaVilla	303	85%	258
Church	119	85%	101
Core	2,904	85%	2,468
Cathedral	254	85%	216
Riverfront West	1,685	85%	1,432
Institutional	42	85%	36
Stadium	4,542	85%	3,861
River Park	84	85%	71
Riverfront East	621	85%	528
Southbank	169	85%	144
Brooklyn	29	85%	25
TOTAL	**10,752**		**9,139**

Reduction	1,613

Source: Timothy Haahs & Associates, 2019

Current Parking Adequacy

On-Street Parking Adequacy

With the previously calculated effective parking supply, we can use the observed demand in order to determine the current parking adequacy for the on-street parking spaces. The result is a 384-space surplus which was observed between 9am and 11am on a weekday. Of note, the Core sub-area experienced an on-street parking shortage of 12 to 16 spaces during the work hours and the very busy conditions continued until after many of the downtown businesses were closed and employees departed the area. The high utilization of the on-street parking spaces is a direct result of the current pricing structure of the on- and off-street parking facilities in the area as motorists seek the most convenient and least expensive location. As expected, the on-street parking adequacy significantly increased after business hours for all sub-areas.

Table 10: 2018 On-Street Parking Adequacy by Sub-Area

ON-STREET SUB-AREA	EFFECTIVE SUPPLY	PARKING ADEQUACY 9A-11A	1P-3P	5P-7P
LaVilla	48	18	21	31
Church	208	75	82	137
Core	499	**(12)**	**(16)**	231
Cathedral	67	44	35	49
Riverfront West	369	155	205	216
Institutional	102	28	9	63
Stadium	31	31	30	3
River Park	0	0	0	0
Riverfront East	0	0	0	0
Southbank	45	36	30	38
Brooklyn	43	8	9	16
TOTAL	**1,413**	**384**	**406**	**785**

Source: Timothy Haahs & Associates, 2019

Off-Street City-Owned Public Parking Adequacy

As with the on-street parking, we compared the effective supply against the parking demand to determine the current parking adequacy. At the time of our observances, the City-Owned off-street parking facilities experienced a 706-space parking surplus.

Table 11: 2018 City-Owned Off-Street Parking Adequacy

CITY-OWNED PARKING FACILITY NAME	SUB-AREA	EFFECTIVE SUPPLY	PARKING ADEQUACY 9A-11A	1P 3P	5P-7P
Water Street Garage	Core	1,347	217	218	1,131
Library Garage	Core	563	231	224	461
Ed Ball Garage	Core	306	35	45	266
Yates Garage	Riverfront W.	563	165	142	464
Forsyth Street Lot	Core	84	58	56	76
Bay & Ocean Lot	Riverfront W.	46	15	(1)	(9)
TOTAL		**2,909**	**721**	**684**	**2,389**
	Core	2,300	541	543	1,934
	Riverfront W.	609	180	141	455

Source: Timothy Haahs & Associates, 2019

Off-Street Privately-Owned Public Parking Adequacy

Again, we compared the effective supply against the parking demand to determine the current parking adequacy. At the time of our observances, the privately-owned off-street parking facilities (available for general public use) experienced a 6,031-space parking surplus.

Table 12: 2018 Privately-Owned Off-Street Parking Adequacy by Sub-Area

PRIVATELY OWNED OFF-STREET	EFFECTIVE	PARKING ADEQUACY		
SUB AREA	SUPPLY	9A 11A	1P-3P	5P 7P
LaVilla	258	226	223	236
Church	101	(26)	(17)	25
Core	2,468	883	856	1,908
Cathedral	216	29	10	142
Riverfront West	1,432	889	754	1,137
Institutional	36	8	(5)	22
Stadium	3,861	3,549	3,524	3,535
River Park	71	71	68	71
Riverfront East	528	528	528	520
Southbank	144	129	76	72
Brooklyn	25	(4)	15	15
TOTAL	**9,139**	**6,281**	**6,031**	**7,682**

Source: Timothy Haahs & Associates, 2019

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Summary of Current Conditions

The table below summarizes all of the 2018 observed peak-hour parking conditions by parking facility type and by parking sub-area.

Table 13: 2018 Parking Supply, Demand and Adequacy by Type and Sub-Area

2018 PARKING CONDITIONS	PARKING SUPPLY	EFFECTIVE SUPPLY	PEAK DEMAND	PARKING ADEQUACY
On-Street	1,662	1,413	1,007	406
City Off-Street	3,225	2,909	2,225	684
Private Off-Street	10,752	9,139	3,108	6,031
TOTAL	**15,639**	**13,461**	**6,340**	**7,121**

2018 PARKING ADEQUACY	ON STREET	CITY OFF STREET	PRIVATE OFF-STREET	TOTAL ADEQUACY
LaVilla	21	0	223	243
Church	82	0	(17)	65
Core	(16)	543	856	1,384
Cathedral	35	0	10	45
Riverfront West	205	141	754	1,100
Institutional	9	0	(5)	4
Stadium	30	0	3,524	3,554
River Park	0	0	68	68
Riverfront East	0	0	528	528
Southbank	30	0	76	106
Brooklyn	9	0	15	24
TOTAL	**406**	**684**	**6,031**	**7,121**

Source: Timothy Haahs & Associates, 2019

During our field surveys, the largest amount of unused parking inventory was located in private off-street facilities and in the Stadium.

For most of the sub-areas, there is an ample supply of on-street parking with the exception of the Core sub-area, which is currently operating at a level above recommended industry standards. Anytime an on-street parking system exceeds 85% occupied, motorists spend more time circling the roadways in search of one of the last remaining spaces. This circling of vehicles causes roadway congestion, higher incidents of vehicle-pedestrian conflicts, carbon emissions/poor air quality, and driver frustration. Based on our visits and observations, the current on-street pricing structure is likely one large factor in the high on-street utilization rate.

Pricing guidelines should follow the general rule of applying the highest fees to the most convenient spaces in order to encourage turnover of those spaces, allow a greater number of short-term users to have access to local businesses, and distribute demand throughout the system. At this time, the $0.50 hourly rate on-street is lower than almost every public and privately-owned off-street parking facility with the lowest charging $1.00 per hour. Shifting users to off-street parking areas and encouraging turnover of on-street parking spaces is very difficult when the pricing structure is reversed as it is currently in Jacksonville.

Given the marginal surplus in many sub-areas and the fact that a large majority of the surplus parking spaces are not owned or controlled by the City, should an event occur which increases the demand in a specific sub-area, the current parking surplus could quickly be depleted and a parking shortage may occur.

Future Parking Conditions

We have considered several factors into the analysis of the estimated future parking conditions including population growth, anticipated development, and displaced parking facilities.

Normal Growth

Based on data from the U.S. Census Bureau, the City of Jacksonville has experienced positive growth over the past five years and is anticipated to continue to grow in the future. For the purpose of this study, we have assumed a 1.0% annual growth due to normal or population growth for the next five years. Historical population figures are included in the table on the following page.

Table 14: Historical Population Growth

YEAR	POPULATION	ANNUAL GROWTH
2013	843,383	
2014	859,479	1.9%
2015	866,856	0.9%
2016	880,893	1.6%
2017	892,062	1.3%

Source: U.S. Census and Timothy Haahs & Associates, 2019

Changes in Mobility

There are currently two trends in mobility that we believe will impact future parking demand in downtown environments: Ride-sharing and the concept of autonomous or driverless vehicles.

The first trend, ride-sharing, or services such as Uber and Lyft, has already caused disruption in some parking markets. Some airports and hotels have already experienced a decrease in the number of people choosing to drive and park as ride-sharing is sometimes less expensive and more convenient with door-to-door service. Ride-sharing is also impacting entertainment districts where alcohol is served, as some patrons can enjoy drinking without the need to designate a driver. In order to accommodate more users using ride-sharing services, we recommend incorporating additional drop-off and loading zones, as appropriate, which will help alleviate roadway congestion as the number of trips increases in the future.

The second trend, autonomous vehicles, is transitioning from concept to a reality. There is a great deal of uncertainty regarding the timeline, how those vehicles will be used/sold, how these vehicles will be regulated, and what the true impact will be on the parking industry. Two of the possible uses that are notable for the parking industry are:

1. The purchase of driverless vehicles by ride-share companies to create a large fleet of on-demand vehicles. This model would potentially allow households to downsize the number of vehicles due to the cost of owning a vehicle being greater than the cost of using the service. As a result, the need for employee parking, for example, could decline as the ride-sharing vehicles would only drop-off and pick-up passengers as needed. (There would be a need to charge and service those vehicles but it would likely be at a low-cost location and not in a dense area with valuable land.)
2. The wide-spread purchase of driverless vehicles by individuals. In this model, a single autonomous vehicle could be used by multiple household members as it could drop a person off at work, return home, and drive a second person to their place of employment or shopping. Unless the cost of parking was minimal, the users would simply have their vehicle go back home to park until they needed to go somewhere else. As in the first model, demand for parking would be reduced as would the rate that a facility owner could demand.

There are many other models and scenarios that could potentially occur with respect to autonomous vehicles. Ultimately, we do not know what that impact will be and to what extent it will affect parking. We do know that autonomous vehicles are being developed and that, eventually, downtown parking systems will need to adapt.

Representatives from JTA also shared their plans and vision of a new Skyway system that is capable of incorporating autonomous transit vehicles into their existing system. The new system is referred to as the Ultimate Urban Circulator, or U2C, and will be capable of extending the service area by allowing the passenger cars to descend to a dedicated at-grade travel lane. As with all other changes in technology, the expanded Skyway system will provide an additional linkage to various destinations without the need of a private vehicle.

It is now more critical than ever for municipalities to maximize the efficiency of the existing parking assets to their fullest potential through smart management. When an owner is evaluating building a parking structure, special considerations should be given to the term of any debt, the ability to meet debt service payments during a (somewhat likely) decline in demand, and how easily the structure can be converted into another use. We have assumed the changes in mobility will reduce demand by 1% annually over the next five years.

Increased Office Occupancy

According to Colliers International's 2018 Q3 report, downtown office buildings are currently at a 7% vacancy. There are 867,780 vacant SF in the Northbank buildings and 199,722 SF in the Southbank buildings for a total of 1,067,502 vacant SF. We have assumed 2% of the current office vacancy will be leased with new tenants each year for the next five years and each of those tenants will require five parking spaces per ksf leased. The following table summarizes the anticipated impact of increased office occupancy.

Table 15: Estimated Impact from Future Office Occupancy Increases

YEAR	2019	2020	2021	2022	2023	TOTAL
New SF Leased	21,350	21,350	21,350	21,350	21,350	
Sub-Total			64,050		42,700	106,750
Parking Demand Increase	107	107	107	107	107	
Sub-Total			320		214	534

Source: Colliers International and Timothy Haahs & Associates, 2019

Future Development

The DIA provided a list of 20 anticipated development projects within the next five years. Development assumptions beyond five years were not provided. For each of the developments, we were directed to assume the required number of parking spaces per the zoning code would be provided. We performed a preliminary analysis of each project within our shared-parking model to determine whether each of the developments would impact the weekday, daytime peak-hour demand (1pm to 3pm).

Of the 20 projects, only two are anticipated to exceed their parking capacity per code: the Doro Block development located in the Stadium sub-area may increase the peak hour parking demand by 30 to 40 spaces, and the Jones Brothers Building development located in the Core sub-area may increase the peak-hour demand by 40 to 50 spaces.

In addition, two of the projects will impact the parking supply: the Jones Brothers Building development will displace the 88-space Forsyth Street City parking lot and the Shipyards/Met Park development will displace the 750-space Maxwell House, as well as Lot X, H, and K, that are currently used to park approximately 1,500 vehicles during events.

Table 16: Future Development Projects

NAME	PROGRAM	PARKING REQUIRED BY CODE	ESTIMATED IMPACT ON PARKING	SUB-AREA	TIMLINE IN YEARS
The District		**4,265**	**None**	**Southbank**	**3-5**
1,170	multi-family	2,517			
200	hotel rooms	200			
268,500	retail	806			
20,000	restaurant	60			
200,000	office	600			
125	marina slips	83			
Lofts of LaVilla		**281**	**None**	**LaVilla**	**1-3**
130	multi-family	281			
Broadstone River House		**569**	**None**	**Southbank**	**1-3**
264	multi-family	569			
Parkview Plaza		**200**	**None**	**Brooklyn**	**1-3**
200	hotel rooms	200			
Houston Street Manor		**156**	**None**	**LaVilla**	**1-3**
72	multi-family	156			
Nuvo Self Storage		**19**	**None**	**Brooklyn**	**1-3**
94,345	industrial	19			
Lofts of Monroe		**233**	**None**	**LaVilla**	**1-3**
108	multi-family	233			
200 Riverside		**705**	**None**	**Brooklyn**	**1-3**
308	multi-family	663			
14,000	restaurant	42			
Southbank Ventures		**646**	**None**	**Southbank**	**1-3**
300	multi-family	646			
Arkest		**87**	**None**	**Brooklyn**	**1-3**
40	multi-family	87			
JTA		**129**	**Minimal**	**LaVilla**	**1-3**
43,000	office	129			
Doro Block		**164**	**30-40 Spaces**	**Stadium**	**3-5**
22,250	retail	67			
22,250	restaurant	67			
10,000	office	30			
LST		**607**	**None**	**Core**	**1-3**
27,569	retail	83			
10,000	restaurant	30			
150	hotel rooms	150			
35,630	office	107			
110	multi-family	238			
Home Street		**324**	**None**	**Southbank**	**1-3**
150	multi-family	324			
Loft (Jefferson Station) La Villa		**287**	**None**	**LaVilla**	**1-3**
133	multi-family	287			
Knine		**35**	**Minimal**		**1-3**
7,348	day-care	35			
Real Estate Office		**15**	**Minimal**		**1-3**
5,000	office	15			
Hyatt Place		**108**	**None**	**Core**	**1-3**
108	hotel rooms	108			
Shipyards / Met Park		**5,247**	**None**	**River Park**	**3-5**
400	marina slips	267			
1,000,000	office	3,000			
356	hotel rooms	356			
662	residential	1,324			
70,000	retail	210			
30,000	restaurant	90			
Jones Brothers Building		**92**	**40-50 Spaces**	**Core**	**1-3**
28	residential	56			
6,050	retail	18			
6,050	restaurant	18			

Source: City of Jacksonville DIA and Timothy Haahs & Associates, 2019

2021 and 2023 Estimated Future Parking Conditions

At this time, the City controls only a small portion (966 spaces) of the current on and off-street parking surplus of 6,325 spaces observed during our field surveys. The anticipated impact from normal population growth (1% per year) is essentially eliminated with the anticipated impact from changes in mobility (-1% per year).

We do not anticipate a significant impact from the proposed developments based on the assumption that each of those projects will provide on-site parking to meet their needs per the existing code. We have included the impact from development within the table later in this section of the report. Since this analysis was initially performed, we understand some of those developments may receive or have received a parking reduction. However, most of the development programs include multi-family residential, which experiences peak demand during the evening and weekend hours and because of that, we do not believe those reductions will impact our three and five-year recommendations.

We do recommend the consideration of a payment in lieu of parking (PILOP) program where developers would contribute a fixed amount per parking space not provided within their development. PILOP programs reduce the burden to the City for subsidizing the parking associated with private development. PILOP funds are typically earmarked to support parking improvements, transit, and mobility initiatives.

We do not anticipate a significant impact from new office leases; however, should a large employer move to Jacksonville, the impact may be more significant. We believe the recommended changes previously mentioned (relocation of all jurors, activating economy lots, and implementing a circulator/shuttle) will allow employers to locate a block of parking suitable to meet their needs and not hinder their relocation to downtown Jacksonville. We have not incorporated the impact of the additional 534 office vehicles (320 in 2021 and another 214 in 2023) in the summary table at the end of this section of the report.

Table 17: Future Parking Conditions w/o Office Impact

2021 PARKING CONDITIONS	PARKING SUPPLY	EFFECTIVE SUPPLY	PEAK DEMAND	PARKING ADEQUACY
On-Street	1,662	1,413	1,007	406
City Off-Street	3,137	2,830	2,270	560
Private Off-Street	10,752	9,139	3,108	6,031
TOTAL	**15,551**	**13,382**	**6,385**	**6,997**

2023 PARKING CONDITIONS	PARKING SUPPLY	EFFECTIVE SUPPLY	PEAK DEMAND	PARKING ADEQUACY
On-Street	1,662	1,413	1,007	406
City Off-Street	3,137	2,830	2,270	560
Private Off-Street	10,002	8,502	3,143	5,359
TOTAL	**14,801**	**12,745**	**6,420**	**6,325**

2021 PARKING ADEQUACY	ON STREET	CITY OFF	PRIVATE OFF STREET	TOTAL ADEQUACY
LaVilla	21	0	223	243
Church	82	0	(17)	65
Core	(16)	419	856	1,259
Cathedral	35	0	10	45
Riverfront West	205	141	754	1,100
Institutional	9	0	(5)	4
Stadium	30	0	3,524	3,554
River Park	0	0	68	68
Riverfront East	0	0	528	528
Southbank	30	0	76	106
Brooklyn	9	0	15	24
TOTAL	**406**	**560**	**6,031**	**6,997**

2023 PARKING ADEQUACY	ON STREET	CITY OFF-	PRIVATE OFF STREET	TOTAL ADEQUACY
LaVilla	21	0	223	243
Church	82	0	(17)	65
Core	(16)	419	856	1,259
Cathedral	35	0	10	45
Riverfront West	205	141	117	463
Institutional	9	0	(5)	4
Stadium	30	0	3,489	3,519
River Park	0	0	68	68
Riverfront East	0	0	528	528
Southbank	30	0	76	106
Brooklyn	9	0	15	24
TOTAL	**406**	**560**	**5,359**	**6,325**

Source: Timothy Haahs & Associates, 2019

Based on the existing conditions observed and assumptions previously outlined, we anticipate the overall market will be capable of meeting the peak-hour weekday parking needs for the next five years. The perception of a downtown parking shortage is actually an accessibility and proximity issue that can be mitigated by implementing best practices in parking, mobility, and transit.

Once again, given the marginal surplus in many sub-areas and the fact that a large majority of the surplus parking spaces are not owned or controlled by the City, should an event occur which increases the demand in a specific sub-area, the parking surplus could quickly be depleted and a parking shortage may occur.

Stakeholder Interviews

As part of this study, our team, at the direction of the DIA and the Office of Public Parking, extended invitations to over 30 stakeholders, entities, and organizations to solicit input on downtown parking. During our three-day visit to conduct stakeholder interviews, we were able to meet with a wide representation of public and private stakeholders in order to gather insight from all perspectives and interest groups. The following individuals agreed to meet with our team as part of this study.

Table 18: Parking Study Stakeholder Meeting List

DATE & NAME	ENTITY/ORGANIZATION
Monday, August 6, 2018	
Christina Parrish-Stone	Hemming Park
Keith Meyerl	Northbank Riverwalk
Liz Craig	Riverplace Tower (Commonwealth Commercial)
Council Member CM Anderson	City of Jacksonville
Tuesday, August 7, 2018	
Mark Rimmer	Everbank Center (RTA Consulting)
Sally Lockett	Bank of America Tower (Hertz Investment Group)
W. Wade Powers	Bank of America Tower (Colliers Int'l)
Robert Selton, III	Bank of America Tower (Colliers Int'l)
Brad Thoburn	Jacksonville Transportation Authority
Council Member Jim Love	City of Jacksonville
Wednesday, August 8, 2018	
Council Member Lori Boyer	City of Jacksonville
Council Member Reggie Gaffney	City of Jacksonville
John Spassoff	The Peninsula
Jessica Fergusun	San Marco Place
Numa C. Saisselin	Florida Theatre

Source: Timothy Haahs & Associates, 2019

Valuable insight and input was provided by each of the above stakeholders, and their participation was appreciated. All of their comments and recommendations have been considered and incorporated into the recommendations for this study, as appropriate. A summarized list of the feedback received during the stakeholder meetings is included on the following page. The comments listed do not represent those of TimHaahs, the Downtown Investment Authority, or the City of Jacksonville.

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Table 19: Parking Study Stakeholder Meeting Input

STAKEHOLDER INPUT
Public policies should support a large scale mobility strategy vs. a narrow- and short-term view.
A pay by phone payment option is needed.
Monthly parking needs to decrease to $50-$60 per month to attract new downtown tenants and keep them from moving to the suburbs.
The cost of operating a trolley is less than the cost to build a parking garage.
On-street is the cheapest place to park and it hasn't been very well enforced.
Traffic patterns during NFL games and other events at the stadium discourage visitors from staying and patronizing businesses in downtown. A free downtown shuttle to and from the stadium may encourage visitors to visit downtown before and after events and boost sales for local businesses.
Downtown needs more parking available within the core for C-Level employees and should consider building a garage.
The downtown is too spread out, where is the "center?"
The Riverwalk is not connecting pedestrians as well as it could and should. Heavily underutilized city asset.
Pedestrian safety should be addressed.
Residential guest parking is a major obstacle as most residential towers do not have sufficient parking on-site for those users.
There is a low perception of safety during the evening hours but the actual number of incidents does not support that perception.
Theater patrons do not typically complain about parking as there are over 1,500 spaces within a 1-block radius.
There has historically been a communication failure between transit and the various City departments.
The City should apply smart parking concepts.
On-street parking meters are bagged too early in advance of events; the City should reconsider their procedures to allow those parking spaces to be utilized more before the actual events.
The skyway does not operate on most weekends. A special request can be made to JTA to operate during large events.
The Library Garage is not manned on the weekends and only accepts credit card payment which has frustrated some patrons. In addition, many patrons are not aware that the Library Garage is open and available to the public on the weekends.
Some properties on Southbank are currently selling their surplus parking as monthly permits and the parking demand is expected to increase with the road diet plan.
Consideration should be made for making more of the spaces public in the MPS Courthouse Garage as they are currently holding 400 spaces for the jurors to use one day a month.
There is a need to look at the MPS facilities to see how those can be better utilized.
The office market desires 5 parking spaces per thousand square feet leased but most building owners do not have that supply of parking available.
The skyway is underutilized but hopefully the UUC will help.
Some building owners are considering an increase to their parking rates.
According to ULI, there are many underutilized assets in downtown.
The City should explore the use of remote lots for employee parking, especially for the commercial businesses near residential neighborhoods.
Business closing times should be better regulated when they are in close proximity to neighborhoods.

Source: Stakeholder Meeting Input (August 6, 7, and 8, 2018)

Catalog of Buildings

According to City representatives, downtown Jacksonville has struggled to attract new employers to fill office vacancies. One major reason cited is the shortage of dedicated and on-site parking at the various office buildings. Office leasing agents have confirmed that they are faced without control of enough parking spaces to meet prospective new tenant demands. To exacerbate their parking challenges, the traditional office design has evolved and adapted as a result of the recent economic recession. Today, most tenant spaces are designed as an open office layout with shared work areas instead of private offices, smaller collaboration spaces in place of large conference rooms, and flexible lobby areas. The evolution of today's office design has resulted in a higher density of employees (i.e. more employees per square foot of leased space), which is then translated into a larger number of parking spaces required for each tenant.

Most office buildings are designed to accommodate 2.5 to 3.0 parking spaces per thousand square feet (KSF) of leased space, which was appropriate for the office layout 20 years ago. However, with the newer "open office" design, employers are seeking 4.0 to 5.0+ parking spaces per KSF leased.

Historically, Jacksonville leasing managers have been capable of securing additional long-term monthly leases for new tenants in other nearby private parking facilities. With the increased office density, the number of available private parking facilities has been diminished considerably. Securing parking leases is made even more difficult as prospective tenants do not wish to make their employees walk more than a few blocks, which further narrows down the list of available parking facilities.

In order to understand the downtown building market, we started by compiling a list of all buildings. For consistency, we used the same block identifier as was used in the parking inventory. Maps showing the block identifiers are included in **Appendix D** at the end of this report.

In the following tables are the 66 buildings, greater than 40,000 square feet, located in the Southbank (10 buildings) and Northbank (56 buildings) areas of downtown. In addition to the block identifier, we have identified their physical address, gross square feet (as listed on the Duval County property appraiser's database), and the total number of stories. While building names are included, several buildings have been known by multiple names and, therefore, our data is based on the physical address.

Table 20: 2018 Catalog of Downtown Jacksonville Buildings - Southbank

BLOCK	BUILDING NAME	PHYSICAL ADDRESS	GROSS SF	STORIES
286	Riverplace Tower	1301 Riverplace Boulevard	630,784	28
286	The Strand	1401 Riverplace Boulevard	1,192,067	28
288	AvMed Building	1300 Riverplace Boulevard	123,697	8
288	San Marco Place	1478 Riverplace Boulevard	141 units	21
289	Stein Mart	1200 Riverplace Boulevard	248,549	10
291	Prudential	701 San Marco Boulevard	539,698	20
294	Aetna Building (Prudential)	841 Prudential Drive	609,508	22
295	Baptist Medical Pavilion	800 Prudential Drive	102,689	5
304	Baptist Health Buildings	1650 Prudential Drive	85,074	4
305	Duval County Public Schools	1701 Prudential Drive	123,152	5

Source: Duval County Property Appraiser and Timothy Haahs & Associates, 2019

Table 21: 2018 Catalog of Downtown Jacksonville Buildings - Northbank

BLOCK	BUILDING NAME	PHYSICAL ADDRESS	GROSS SF	STORIES
3	Old JEA	424 Pearl Street	182,000	13
5	JEA Office Building	233 W. Duval Street	171,070	18
6	City Hall at St James	117 W. Duval Street	338,904	4
7	City Hall Annex	407 N. Laura Street	63,561	6
7	JEA	421 N. Laura Street	171,080	7
10	County Courthouse	501 W. Adams Street	823,530	7
11	State Attorney	311 W. Monroe Street	250,713	5
12	US Courthouse	300 N. Hogan Street	326,485	14
14	Museum of Contemporary Art	333 N. Laura Street	54,834	5
14	Public Library	303 N. Laura Street	329,412	5
16	Edward Ball Building	214 N. Hogan Street	441,672	11
17	Greenleaf Building	208 N. Laura Street	57,000	12
17		201 N. Hogan	46,014	4
18	Police & Fire Pension	1 W. Adams Street	43,563	3
18	Police & Fire Pension	2 W. Adams Street	96,928	7
18	11 East Forsyth	11 E. Forsyth Street	153,000	17
22		300 W. Adams Street	51,077	6
24		126 W. Adams Street	40,464	7
24	Barnett Tower	112 W. Adams Street	171,401	18
24	Furchgott's	130 W. Adams Street	56,984	5
24		100 N. Laura Street	167,455	10
24	121 Atlantic Place	121 Forsyth Street	63,611	5
25	Farah & Farah Building	10 W. Adams Street	42,210	3
31	Everbank	301 W. Bay Street	1,164,000	30
32	BB&T	200 W. Forsyth Street	307,630	18
33	Bank of America	50 N. Laura Street	1,034,653	43
33	iBeriabank	135 W. Bay Street	45,715	5
34	Allegiance	1 W. Bay Street	298,417	9
37	Federal Building (Bennett)	400 W. Bay Street	257,504	11
38	Omni	245 Water Street	296,671	16
38	One Enterprise Center	225 Water Street	370,112	22
39	Sun Trust	76 S. Laura Street	432,970	23
39	Life of the South	100 W. Bay Street	73,326	6
40	Wells Fargo	1 W. Independent Drive	992,501	37
41	CSX	550 Water Street	244,848	14
43	Times-Union CPA	300 Water Street	239,327	3
44	Landing	2 W. Independent Dr.	147,669	2
46	CSX	500 Water Street	4,788,987	17
47	Florida Times Union	1 Riverside Avenue	222,638	3
48	Haskell	111 Riverside Avenue	273,193	3
49	Raymond James	245 Riverside Avenue	138,014	5
51		602 Riverside Avenue	68,398	6
51	Alfred Dupont Trust	510 Alfred Dupont Place	69,327	5
51	Everbank	501 Riverside Avenue	296,148	13
52	Fidelity National Tower 2	601 Riverside Avenue	287,670	8
55	Blue Cross Blue Shield	532 Riverside Avenue	622,923	20
101	Convention Center	1000 W. Bay Street	299,005	2
102	Federal Reserve Bank	800 Water Street	219,724	3
165	Residences at City Place	311 W. Ashley Street	205 units	16
179	JEA Tower	21 W. Church Street	347,811	19
188	Cathedral Terrace	701 N. Ocean Street	174,855	21
192	Cathedral Towers	601 N. Newman Street	181,796	17
200	Cathedral Townhouse	501 N. Ocean Street	179 units	18
229	Hyatt Regency	225 E. Coast Line Drive	671,414	18
229	City Hall Annex	200 E. Bay Street	228,289	15
232	Berkman Plaza I	400 E. Bay Street	206 units	22

Source: Duval County Property Appraiser and Timothy Haahs & Associates, 2019

The following table summarizes the 41 buildings where we were able to identify the parking assets associated with each building. We understand that several building owners have secured parking in addition to the locations listed below. We also understand that a portion of the 25 buildings without any identified parking have also secured off-site parking. Many of the building owners were not open to sharing that information publicly given the competitive nature of the market.

Table 22: 2018 Catalog of Parking Assets for Downtown Jacksonville Buildings

BLOCK	BUILDING NAME	PHYSICAL ADDRESS	SPACES	PARKING ID
5	JEA Office Building	233 W. Duval Street	pvt.	5A
7	JEA	421 N. Laura Street	gated	7B
10	County Courthouse	501 W. Adams Street	1570	21A
14	Public Library	303 N. Laura Street	626	7A
16	Edward Ball Building	214 N. Hogan Street	340	16A
31	Everbank	301 W. Bay Street	880	29A
32	BB&T	200 W. Forsyth Street	656	23A
33	Bank of America	50 N. Laura Street	pvt.	33A
37	Federal Building (Bennett)	400 W. Bay Street	181	37A
38	Omni	245 Water Street	1100	38B
38	One Enterprise Center	225 Water Street	285	38C
39	Sun Trust	76 S. Laura Street	pvt.	39A
40	Wells Fargo	1 W. Independent Drive	pvt.	40A
41	CSX	550 Water Street	pvt.	41, 41, 45, 46
44	Landing	2 W. Independent Dr.	140	44A
47	Florida Times Union	1 Riverside Avenue	649	47A
48	Haskell	111 Riverside Avenue	517	48A
49	Raymond James	245 Riverside Avenue	pvt.	49B, 49C, 50A
51	Everbank	501 Riverside Avenue	639	51A
52	Fidelity National Tower 2	601 Riverside Avenue	462	52A
55	Blue Cross Blue Shield	532 Riverside Avenue	pvt.	55A, 55B, 55C
101	Convention Center	1000 W. Bay Street	dnc.	101A, 101B
102	Federal Reserve Bank	800 Water Street	gated	102
165	Residences at City Place	311 W. Ashley Street	pvt.	165B
179	JEA Tower	21 W. Church Street	gated	179
188	Cathedral Terrace	701 N. Ocean Street	pvt.	188
192	Cathedral Towers	601 N. Newman Street	pvt.	192
200	Cathedral Townhouse	501 N. Ocean Street	pvt.	200
229	Hyatt Regency	225 E. Coast Line Drive	600	228A
229	City Hall Annex	200 E. Bay Street	closed	231A
232	Berkman Plaza I	400 E. Bay Street	pvt.	232B
286	Riverplace Tower	1301 Riverplace Boulevard	792	286A
286	The Strand	1401 Riverplace Boulevard	pvt.	286B
288	AvMed Building	1300 Riverplace Boulevard	354	288A, 288B, 288D
288	San Marco Place	1478 Riverplace Boulevard	pvt.	288C
289	Stein Mart	1200 Riverplace Boulevard	561	289A
291	Prudential	701 San Marco Boulevard	pvt.	292A
294	Aetna Building (Prudential)	841 Prudential Drive	1150	294C
295	Baptist Medical Pavilion	800 Prudential Drive	pvt.	294D, 295B, 296A
304	Baptist Health Buildings	1650 Prudential Drive	577	304A
305	Duval County Public Schools	1701 Prudential Drive	404	305A

Source: Duval County Property Appraiser and Timothy Haahs & Associates, 2019

Benchmark Rate Survey

We researched the downtown parking rates from seven (7) other municipalities relatively similar to Jacksonville, either in characteristics or geographic location. In addition to gathering data on the publicly owned facilities, we also collected hourly data, as available, for the privately-owned parking facilities in each of the municipalities. The table below outlines the city's 2017 population (per the U.S. Census Bureau), the public rates for monthly permits, on-street hourly parking, and the off-street hourly parking rates. In the last column, marked in green, are the private off-street hourly rates. During our research, we noted that the rates in the core areas were sometimes much higher than on the periphery. Those variances were noted by listing the lowest and highest rates for each location.

Table 23: Benchmark Rate Data

CITY	2017 POPULATION	PUBLIC PARKING SYSTEM			PRIVATE OFF-STREET HOURLY
		MONTHLY PERMIT	ON-STREET HOURLY	OFF-STREET HOURLY	
Gainesville, FL	132,249	$25.00	$0.25 - $0.50	$0.25 - $0.50	$2.00 - $3.00
Savannah, GA	146,444	$40.00 - $85.00	$1.00 - $2.00	$1.00 - $2.00	$2.00 - $20.00
Birmingham, AL	210,710	$43.00 - $110.00	$1.00	$1.00	$2.00 - $10.00
St. Petersburg, FL	263,255	$16.05 - $65.00	$1.00	$1.00	$2.00 - $5.00
Orlando, FL	280,257	$70.00 - $110.00	$1.00	$1.00 - $2.00	$2.00 - $10.00
Tampa, FL	385,430	$27.00 - $86.00	$0.25 - $1.50	$1.00 - $1.60	$2.00 - $9.00
Miami, FL	463,347	$50.00 - $155.01	1.50-1.75	$1.75-$7.00 first hr; $2.00-$6.00 add'l	$4.00 - $20.00
Jacksonville, FL	**892,062**	**$50.00 - $80.00**	**$0.50**	**$1.00 ($3.00 Library Garage)**	**$1.00 - $6.00**

Source: Timothy Haahs & Associates, 2019

Jacksonville's on-street parking rates are VERY low compared to the peer cities. In fact, only the most remote locations in Tampa, Florida, that are being used as long-term parking are lower than Jacksonville's rates in the busiest area of downtown. The only other City with reported rates below $0.50 per hour is Gainesville, Florida, which is on a much smaller scale compared to Jacksonville. A by-product of Jacksonville's low on-street parking rates is increased traffic congestion as motorists will circulate around their destination, sometimes for multiple loops, until they are able to find a vacant on-street parking space. The large number of one-way streets within downtown may further increase the distance a vehicle drives to circulate around their destination. **We recommend the implementation of an on-street rate of at least $2.00 per hour.**

Jacksonville's off-street hourly rates are relatively in line with the other benchmark cities butc due to the amount of buildings that do not control sufficient on-site parking to meet their needs, **we recommend a rate increase to all public off-street locations**. A rate increase will: 1. Appropriately value the existing parking resources; 2. Distribute the existing parking demand to underutilized parking assets located outside of the core area; and 3. Generate additional revenue that is needed for ongoing maintenance, capital improvement projects, and reinvested into the management and operation of the parking system (i.e. procurement of system to allow for digital permitting and license plate recognition, LPR, parking enforcement).

Through our meetings and interviews with various City representatives, we understand the City currently discounts City employee parking rates. While we appreciate the desire to provide a parking benefit to City employees, the practice of subsidizing parking for any user group creates market inefficiencies, negatively impacts transit ridership, and ultimately increases traffic congestion. In alignment with best practices in urban and transportation planning, **we recommend eliminating the parking subsidy completely or replacing it with a new program that only discounts employee parking in economy/remote parking facilities**.

Duval County jurors are utilizing the Courthouse garage located on the southwest corner of Adams and Clay Street. At this time, the parking operator for that facility must maintain 300 parking spaces for county jurors. However, by holding 300 spaces for juror parking (which only typically occurs on Mondays), the operator is unable to sell additional monthly parking permits. In addition, the hourly demand during the other days of the week does not generate the same volume of revenue as would be generated with the selling of monthly permits. Therefore, the net result of the current policy is a loss of potential revenue at this facility, and, due to the City's agreement with Metropolitan Parking Solutions, the City must contribute towards the shortfall.

We recommend relocating juror parking to economy parking facilities located at the stadium. Jurors are an easy group to relocate as they are receiving free parking, their visits are not often, and they receive notice well in advance of their visit to allow for planning their trip. **We recommend using the downtown circulator/shuttle for jurors as well as downtown employees**. We do recommend requiring jurors to show proof to utilize the remote parking facility and shuttle service, adjusting the hours of operation as dictated by the court, and limiting the free parking benefit to the remote location only (jurors wishing to park at the Courthouse Garage would do so at the hourly rates).

Parking Management and Operations

The City is not currently utilizing the most efficient tools available in their parking operations. While we have not explored all aspects of the City's management practices in detail, we do believe the implementation of License Plate Recognition equipment may improve the efficiency of the parking enforcement officers. In addition, we recommend the use of pay-by-plate payment applications for all new parking meters and pay stations to allow for further simplification of revenue control and enforcement.

License Plate Recognition

License Plate Recognition (LPR) technology uses digital cameras and lasers to perform vehicle recognition (size, shape and color) and combined with accurate GPS, automatically detects and notifies the Parking Enforcement Officer (PEO) of unmoved vehicles. Pictorial evidence is present to the PEO for violation assessment. Despite its sophisticated technology, LPR systems appear reliable in every day operation and in all temperatures and weather. Parking enforcement productivity can increase significantly with LPR enforcement systems thereby allowing PEO's time for enforcing other high priority activities. It also allows enforcement regardless of weather conditions.

Some additional advantages are:

- LPR systems are capable of tracking vehicles with outstanding tickets, fines, warrants.
- LPR equipment allows enforcement officers to monitor time limits and prohibit moving or "shuffling" into an adjacent space to bypass time restrictions.
- Vehicle mounted LPR allows for a smaller, but equally effective, enforcement staff.

The use of license plate recognition has grown substantially and has proven to be a highly efficient method of identifying users using their license plate information. These systems allow a parking department to easily determine whether users exceed time limits by the use of auto-chalking, have paid for parking by comparing their license plate information against the data from pay stations and pay-by-cell systems, and locate users with outstanding tickets or fines. Typically the system includes both hardware (cameras) and software (decoding the images into data which can be compared against a real-time database of valid users). LPR can also be utilized to convert to a paperless or digital permitting system. In a digital permit system, monthly parkers would purchase and manage their monthly permits online. In the online system, the user would input their vehicle information including the license plate for their vehicle(s) and submit payment. With a digital permit, the use of parking access equipment can be eliminated and the parking enforcement officer would be capable of easily patrolling facilities with an LPR system to determine if all vehicles are authorized. In instances of unauthorized use, the vehicle would be issued a citation.

In addition to the cost savings from removing or limited use of parking access equipment in a digital permitting system, the administrative costs are significantly reduced as physical permits, access cards, hangtags, and stickers are no longer necessary, mailing and distributing new permits is eliminated, and permit holders can manage their own information updates and submit their payment all online. From a permit holder's perspective, they no longer have to worry about moving their permit when they drive another vehicle as they can enter multiple vehicles into their profile online. They also don't need to permanently affix any stickers or worry about someone stealing their permit hangtag from their vehicle.

The cost of an LPR system is low enough to provide a reasonable return on investment for most municipalities and **we highly recommend the purchase of an LPR system to more efficiently manage the parking system in Jacksonville.**

With the purchase of an LPR system, the City would have the option of converting the off-street parking lots and garages from gated to gateless. A gateless system means that vehicles can easily flow in and out of the parking facility which eliminates queuing issues and potentially backing up traffic onto the roadways or within the parking deck. When a motorist enters the deck, they will park their vehicle at any open space (as designated by the Parking Department), exit their vehicle and pay at the nearby pay station by entering their license plate number along with payment. The pay station will record the payment and the database of valid vehicles will be updated to include the paid vehicle. As the PEO drives through the parking deck in their vehicle with mounted LPR cameras, the cameras will read each license plate and compare it against the database of valid vehicles. The system will alert the PEO if a vehicle is identified that has not paid for parking or their time has expired at which time the PEO will issue a parking citation.

There are numerous other ways LPR can be used in gated and gateless facilities to manage parking however the above method is one of the least expensive as the amount of equipment (and the maintenance) is minimized significantly.

Pay-by-Plate

The debate over the use of single space parking meters versus paystation has been ongoing with various advantages and disadvantages of each. Ultimately, the only product available that supports pay-by-plate (PBP) transactions is a paystation. Establishing a parking system where every vehicle is paying for their use of parking using their license plate information, allows a manager to integrate all of the revenue systems (digital monthly permits, mobile payment, and paystation transactions) into a single database. By simply driving around, a parking enforcement officer can automatically detect if every vehicle is paid on-street and within parking facilities. Furthermore, parking managers can access real time data on the utilization and occupancy of various parking facilities, which allows for better decision making and planning for future needs.

While it is possible to enforce within a hybrid system of mobile PBP, single space meters, and monthly access cards, the efficiency of enforcement and the tracking of systemwide utilization is significantly reduced.

As parking equipment is replaced, **we recommend converting all on-street parking areas from single space meters to a PBP paystation or a mobile-payment zone**. While the upfront cost may be higher, we have found that the long-term fees and operational costs associated with a PBP system may actually be lower.

Summary of Recommendations

In order to improve the efficiency of the parking management and operations, better utilize the existing parking assets, and prepare for future growth, we recommend the following:

- Immediately disable on-street credit card transactions below $1.00 as those transactions may actually cost the City more to process than is received from the transaction.
- Implement a mobile payment option, which will allow the city to provide customers with the ability to use a credit card for payment at all parking meters.
- Activate the stadium parking areas as a new economy parking facilities to accommodate downtown employees and customers and distribute the parking demand to these underutilized parking assets.
- Work with JTA to implement a circulator/shuttle to quickly move users from the economy parking facility(s) to the core CBD.
- Increase the hourly rate for the on-street parking meters to not only distribute the current parking demand into the off-street parking facilities, increase turnover, and reduce traffic congestion, but to also properly value this asset within the parking system.

- Increase the off-street monthly parking rates by $10.00 to $30.00, pending location, historical occupancy, and capacity. This will further distribute the parking demand, encourage the use of the newly-activated economy parking locations, and provide new resources for office leasing agents to secure nearby parking for new tenants.
- Relocate Juror parking to the economy parking locations to allow the MPS Courthouse Garage to sell additional monthly parking permits and reduce the City's required subsidy. The existing juror notification packet should be updated to inform all jurors of the location of the parking facilities and the locations for other PAID hourly parking facilities for those wishing to pay for convenience. Generally speaking, shifting this user group is the easiest as they are neither regular parkers nor are they paying customers. However, the implementation of a consistent and reliable circulator/shuttle is critical to the ability to relocate these users.
- Replace the City employee discount parking program with free parking at the economy parking facilities. All employees who wish to continue to park in the core and prime parking facilities would pay the market rate consistent with the overall transit and mobility plan.
- Work with the City's finance department to evaluate the current fees associated with the existing parking meters that accept credit cards in order to determine whether a cost savings may be realized by using a different clearing house process.
- Evaluate whether a cost savings may be realized by renegotiating the current single-space meter vendor agreement, or by changing vendors.
- Improve the marketing and wayfinding to City parking facilities including on the weekends and during events (i.e. the Library Garage). Improvements may be as simple as a temporary sign used to direct motorists or permanently installed signage (either static or variable message signage) that will direct patrons based on the roadway traffic conditions and event.
- Consider implementing "mobile-pay only" parking zones using the above-mentioned mobile payment option. These zones would be signed and marked as a paid parking area with the zone number and all motorists who park in these locations would be required to use the mobile parking app to pay for parking. This will allow the city to quickly implement paid parking with a minimal capital investment and operational expenses. To address concerns from motorists without a mobile device, we suggest installing a few single space meters within close proximity to the mobile-pay only locations only if another pay by cash location is not already present (public or private).
- Revise the current meter bagging procedures prior to events. This will allow for better traffic flow, increased user convenience, and additional revenue. Other municipalities post signage on special event days stating when the meters will be deactivated and any remaining vehicles towed at the owner's expense.
- Consider increasing the on-street hours of enforcement and, at a minimum, including hours on Saturday. This may not be necessary at this time but as development occurs, it will allow the City to generate revenue to support the enforcement of parking during those times.
- Purchase license plate recognition (LPR) equipment for enforcement. This will allow enforcement officers to easily verify mobile-pay vehicles and will allow for a streamline transition to digital permits and eventually pay-by-plate (PBP) transactions.
- Convert all single space parking meters to paystations with PBP capabilities. In addition, upgrade any existing paystations to allow for PBP transactions.

Table 24: Recommendation Matrix

RECOMMENDATION	LEVEL OF EFFORT	PRIORITY	FINANCIAL IMPACT	ESTIMATED COST	COMMENTS
Disable on-street credit card transactions below $1.00	Minimal	High	Positive	None	Eliminate transactions that may result in a net loss after fees
Implement mobile payment services	Minimal	High	Positive	~$50.00/sign	Provides additional payment method to customers & the ability to implement paid parking without parking meters.
Activate economy parking locations	Minimal	High	Neutral	~$20,000/lane (PARCS Equip.)	Activating the underutilized parking assets is the first step to update the parking system.
Coordinate with JTA on the implementation of a downtown shuttle to connect the new economy parking locations with downtown	High	High	Negative	~$40-$50/hour	A shuttle to the economy parking locations is the second step to update the parking system. The shuttle should focus on providing a user friendly experience with frequent service.
Adjust parking rates as follows On-street: $2.00/hr Off-Street: $1.00/hr; Increase permits $10-$30/mo. by demand Economy: $20.00/month Relocate jurors from the Courthouse Garage to an economy parking location	Moderate	High	Positive	None	Price adjustments are the third and final step to update the parking system by organically distributing demand via pricing. Properly valuing the core parking assets will shift users to other low-cost parking alternatives.
	Moderate	High	Positive	None	Juror packet to be updated with the new parking and shuttle information.
Encourage Metropolitan Parking Services to increase Courthouse Garage permit sales	Minimal	High	Positive	None	Increased revenue at the Courthouse Garage will reduce the City's financial obligation.
Replace City employee parking discount program with free economy parking	Moderate	High	Positive	None	Employees wishing to park in the core area for convenience may do so at their expense.
Evaluate the fees associated with the current on-street parking meters	Minimal	Moderate	Positive	None	It may be possible to reduce fees by using a different credit card clearing house.
Evaluate parking equipment vendor pricing for cost-savings	Minimal	Moderate	Positive	None	As technology improves and competition increases, lower expenses may be achieved.
Improve marketing/wayfinding during events	Minimal	Moderate	Positive	$100-$500/sign	Install directional signage to the nearest parking facility(s)
Revise meter bagging procedures	Minimal	Low	Positive	None	Allows for the use of valuable on-street spaces during peak daytime hours
Evaluate increasing the on-street hours of enforcement as growth continues	Moderate	Low	Positive	None	Will allow for better parking management during the evening hours as activity increases. Additional meter revenue will offset the additional cost for enforcement activities.
Explore the implementation of a payment-in-lieu of parking program for future development and redevelopment projects	Moderate	Moderate	Positive	None	Reduces the public burden to subsidize parking associated with new development by providing a parking fund to offset the costs associated with new parking facilities, additional transit routes, and mobility initiatives.
Purchase LPR equipment for enforcement	Minimal	Moderate	Netutral	$50,000/vehicle	Allows for efficient enforcement of mobile-pay transactions. Return on
Convert systemwide equipment to PBP paystations	Moderate	Moderate	Neutral	$7,000/paystation	Higher equipment cost is offset by fewer meters to collect, maintain, service, and operate. All transactions are accessible to the LPR equipement and streamlines the efficiency of enforcement officers. The management of parking is simplified as all data is accessible in a single system.
Convert monthly access cards to digital permits	Moderate	Moderate	Neutral	Varies by Software	Eliminates the issuance of monthly access cards, allows customers to self-manage their parking transactions and account, and provides additional cost-saving options on the operation of parking facilities.

Source: Timothy Haahs & Associates, 2019

APPENDIX D
Sub-Area Maps with Block Identifiers

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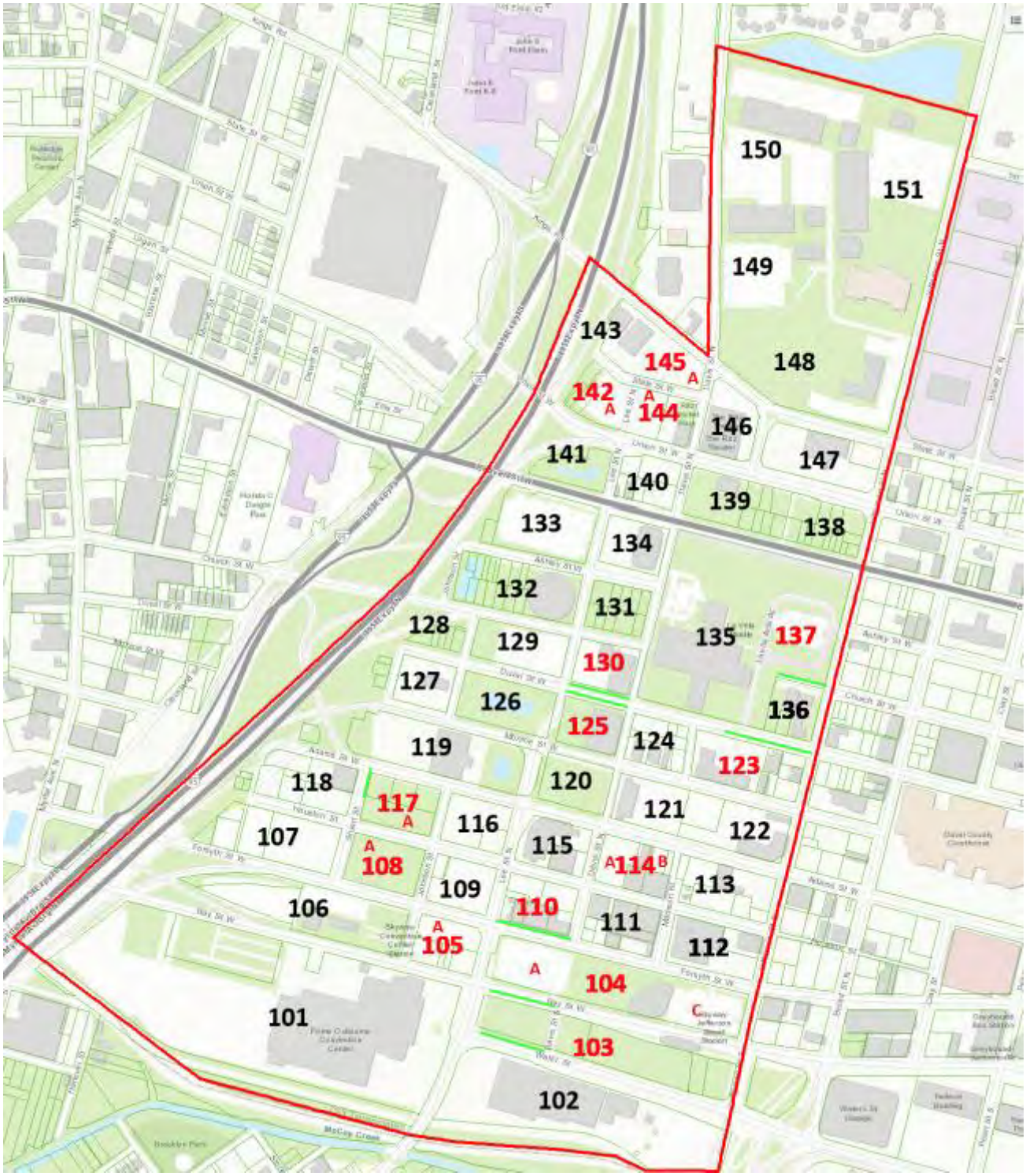
LAVILLA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RIVERFRONT WEST

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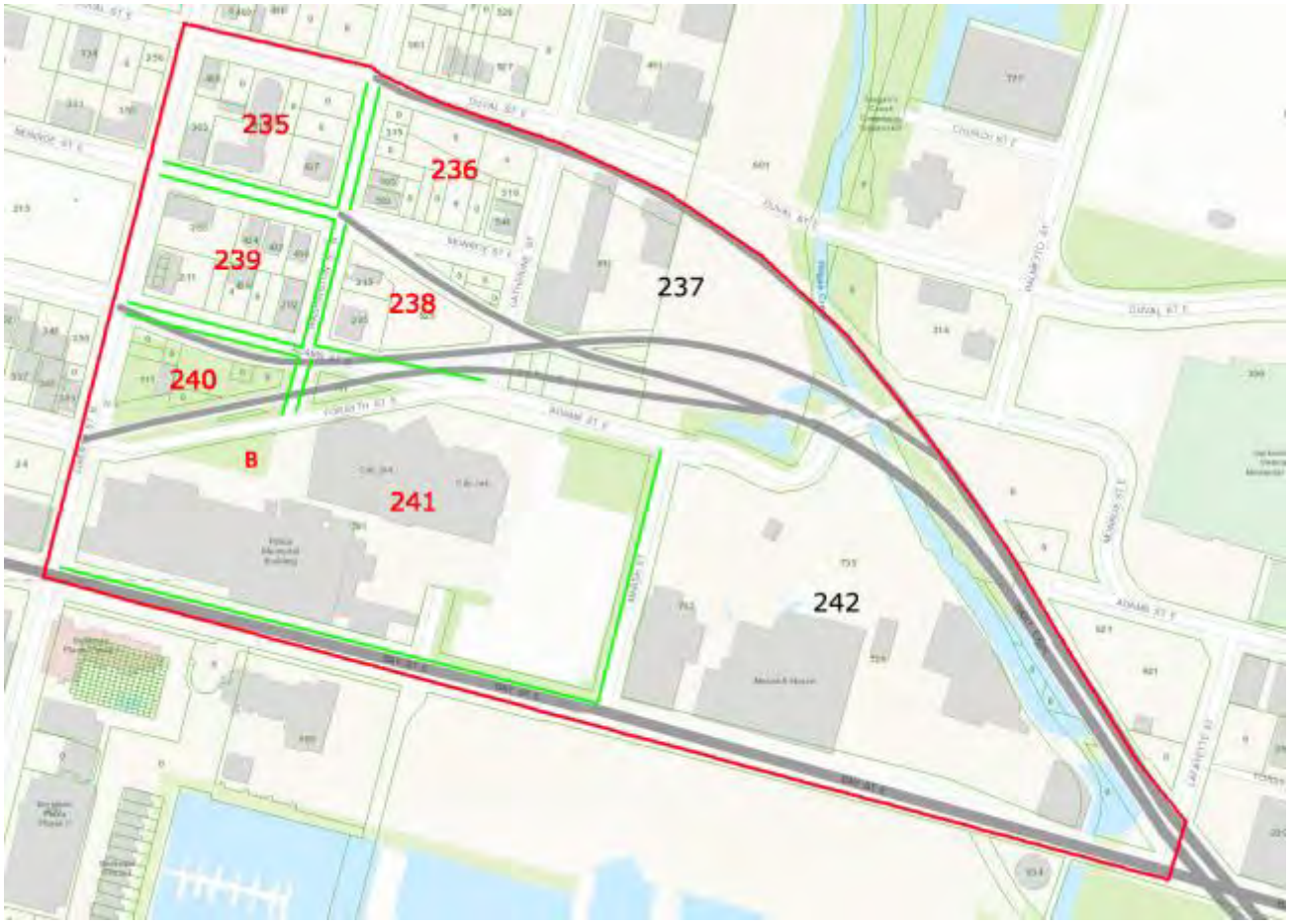

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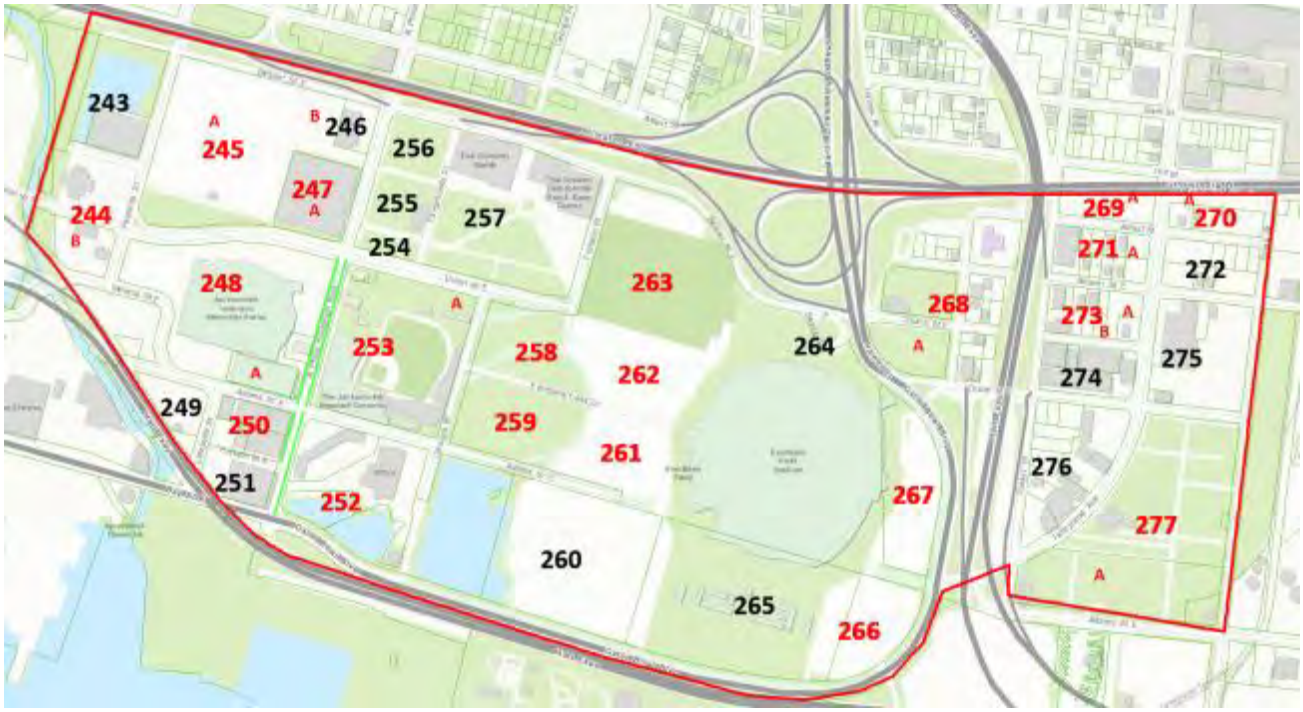

RIVERPARK

SOUTHBANK


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RIVERFRONT EAST