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TO:	CHAIR AND MEMBERS CIVIC WORKS COMMITTEE MEETING ON OCTOBER 06, 2015
FROM:	EDWARD SOLDI, P. ENG. DIRECTOR, ROADS & TRANSPORTATION
SUBJECT	DOWNTOWN LONDON PARKING UTILIZATION STUDY

RECOMMENDATION

That, on the recommendation of the Director, Roads and Transportation, the following report **BE RECIEVED** for information with respect to Downtown London Parking Utilization Study.

PREVIOUS REPORTS PERTINENT TO THIS MATTER
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For additional information, please refer to the following committee reports:

1. May 25, 2006: Downtown Parking Working Group “Downtown London Parking Study”;
2. November 26, 2007: Environment and Transportation Committee “Parking Strategy Business Plan – 2008”;
3. September 28, 2008: Environment and Transportation Committee “Parking Strategy Issues Update”
4. October 19, 2011: Finance and Administration Committee “Proposed Parking Garage Competitive Bid Process”;
5. May 28, 2012: Finance and Administration Committee “2011 Downtown Parking Study Update”;
6. June 19, 2012: Civic Works Committee “London 2030 Transportation Master Plan”;
7. June 16, 2014: Civic Works Committee “Downtown London Parking Study”; and
8. February 2, 2015: Planning and Environment Committee: “Our Move Forward: London’s Downtown Plan”.

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DISCUSSION

In October 2011, the consulting engineering services of MMM Group were retained to update the 2008 Downtown London Parking Study. A draft report was completed and then the study was put on hold pending the results of the Transportation Master Plan and Downtown Master Plan.

The Smart Moves Transportation Master Plan (TMP), a long-term transportation strategy was developed to guide transportation and land use decisions to 2030 and beyond. A key goal of the TMP was to provide convenient choices to enhance mobility for all users and all modes of transportation, including the proposed rapid transit network, both serving the downtown as the main transit hub. The TMP recommended 12 points-action plan which includes finalization of a Downtown Parking Strategy to support the TMP implementation. The intent of the parking strategy is to develop short and long-term parking strategies for the downtown area by closely managing parking supply and demand to support rapid transit and make it easier for more people to come downtown.

The London Downtown Plan entitled “Our Move Forward”, helped to solidify the vision for Downtown and chart a path forward. The London Downtown Plan also referred to the development of a downtown parking strategy that is consistent with and furthers the values, projects, and strategic directions in the Our Move Forward Plan. The provision, management, and siting of downtown parking is an area of special relevance to the successful implementation of the London Downtown Plan. The more vibrant downtown streets become, the more competition there is to use the space available in their rights-of-way. The plan identified the need to review City-owned and operated parking facilities and the role that they could serve both as a response to short-term parking needs and control and manage long-term parking needs to support transit.

The Downtown London Parking Utilization Study was completed in early 2015. The study summarized the results of the 2014 update needs assessment and proposed a parking strategy which addressed observed problems and identified solutions within a 10 year time frame.

However, a long term strategy that ties the planning and development objectives was not completed and will be the subject of a more comprehensive assessment that ties the Rapid Transit initiative, the Transportation Master Plan and the London Downtown Plan objectives together.

The results of the Downtown London Parking Utilization Study are summarized as follows:

Parking Supply

The number of parking stalls in Downtown London has seen some moderate growth as shown on Table 1 from the MMM Group report.

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Category	Existing (2014) Parking Supply	2012 Parking Supply	2008 Parking Supply
Municipal Parking Lots/Structures ⁽¹⁾	1,953 ⁽⁶⁾	1,860 ⁽⁶⁾	1,417
Public Pay Lots ⁽²⁾	3,820	3,818	3,448
Public Structures ⁽²⁾	3,413	3,374	3,682
Private Reserved Lots/Structures ⁽³⁾	3,653	3,568	3,611
Private Miscellaneous Lots ⁽⁴⁾	120	83	84
Semi-Private Public parking Lots ⁽⁵⁾	1,766	1,407	1,327
Off-Street Parking Sub-Total	14,725	14,110	13,569
On-Street Parking Sub-Total	711	714	699
Total	15,436	14,824	14,268

(1) Lots/structures operated by City of London (e.g., Budweiser Gardens) or owned by the City but operated by a private operator (e.g., Covent Market)

(2) Other public lots or structures operated by a private operator (e.g., One London Place parking structure)

(3) Reserved private parking facilities (e.g., Courthouse, Bell Canada)

(4) Small parking areas along alleys or behind buildings

(5) Free parking for customers and/or staff (e.g., Tim Hortons). Generally available for the general public that uses the associated services.

(6) The municipal parking lot at 199 Ridout Lot North has been included again in the 2014 parking survey

Source: MMM Group Limited, London Downtown Parking Study 2014 Update

The majority of the new parking stalls are the result of the completion of Renaissance Phase II at the intersection of York Street and Ridout Street N.

Parking Utilization

Parking field studies were conducted on April 4th, 2012, April 14th, 2012, September 13th, 2014 and September 16th, 2015. Weekday off-street parking utilization is concentrated around peak demand facilities with parking spaces available further from these areas as shown in Figure 6A in the report (Appendix A). The overall utilization of the downtown off-street parking peaked at 71%. It should be noted that public owned/operated parking lots were higher utilized when compared to private parking lots.

The weekend utilization showed that most parking lots have additional capacity to accommodate more vehicles.

The private parking lots have no waiting list for monthly surface parking spots; however, there are waiting lists for monthly parking spots in garages. This suggests that customers are looking for upgrades in the location and type of monthly.

The on-street parking utilization is similar to the off-street parking with high usage in the core of downtown and lower usage on the fringes.

Parking Rates

MMM Group found that the parking rates (\$80 to \$110 per month) in London “are low relative to cities of comparable size, economic activity and parking supply” (\$130 to \$185 per month). An increase in parking rates could be tolerated by the consumer and may encourage the development of new private parking garages which are the preferred parking of the customer.

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Comparison of Unreserved/Random Monthly Parking Rate

City	Average Monthly Parking Rate ⁽⁷⁾
City of London (All Public Parking)	\$145 (\$60 - \$230)
City of London (Municipal Parking)	\$80 (\$60 - \$99.40)
Halifax	\$181.60
Kitchener/Waterloo	\$132.49
Saskatoon	\$157.50
Victoria	\$184.80
Winnipeg	\$159.86

(7)Average Monthly Parking Rate Source for cities other than City of London: 2012 CBD Parking Rate Survey by Colliers International

The study also found that the parking rates in Municipal parking lots and garages was set below the market rate which is impacting the development of a parking garage and it may impact London’s desire to shift more users to transit or other transportation alternatives.

It should be noted that the monthly parking rates in London are similar to the cost of a monthly transit pass (\$81) suggesting that the driving to work is still the most financially attractive option. An increase in the monthly parking rates may be needed to shift more people to transit.

Parking Strategy

The MMM Group study recommends that the City develop a strategic long term Parking Strategy that:

- a) Links with transportation, planning and development strategies, so as to reduce downtown space dedicated to surface lot parking, while simultaneously increasing parking garage space to maintain downtown parking supply to the current level.
- b) Links with transportation, planning and development strategies, so as to accomplish these and other City goals through direct public action (build and own parking structures), or indirectly through private sector development (straight private sector, or P3), at least cost to taxpayers.
- c) Reviews various operating models for the delivery of an a principled, integrated authority to agency or department that will “run like a business”, coordinate operations of municipal on and off Street City parking operations, and measure, lead, advise and implement good customer service in the pursuit of larger sustainable transportation goals, including transit, active transportation, and TDM initiatives, as well as other public policy objectives.

In order to further develop the above; Civic Administration is in the process of retaining a consultant to assist in the development of a Parking Strategy for Downtown London. The main intent of the study is to develop an effective parking strategy for Downtown

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London to support businesses and development in the short term, while managing parking supply and demand in the longer term, mainly to support the City’s urban design, economic, land use, and transportation objectives. The Terms of Reference document for the Strategy has been completed and the process of retaining a consultant has been initiated. It is anticipated that development of the Parking Strategy will conclude in summer of 2016 at which time it will be presented to Municipal Council for review and adoption.

CONCLUSION

At present there is sufficient available monthly parking (71% utilization) to satisfy the demand; however, there is a clear preference by customers for parking garages, which do not meet the demand. The existing parking rates are below comparable municipalities and the monthly parking rates for surface parking lots is comparable to the cost of a monthly transit pass which may impact the City’s ability to shift drivers to transit.

The Downtown Parking Utilization Study provides the technical basis, data and observations that will be beneficial in developing the new Parking Strategy for Downtown London.

PREPARED BY:	RECOMMENDED BY:
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September 23, 2015

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Attach: Appendix A: 2014 Off-Street Parking Utilization
 cc. A. Drost

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APPENDIX A
2014 OFF-STREET PARKING UTILIZATION

