

# Mobility in the Gardens

## Palm Beach Gardens ~ Station Area TOD Plan

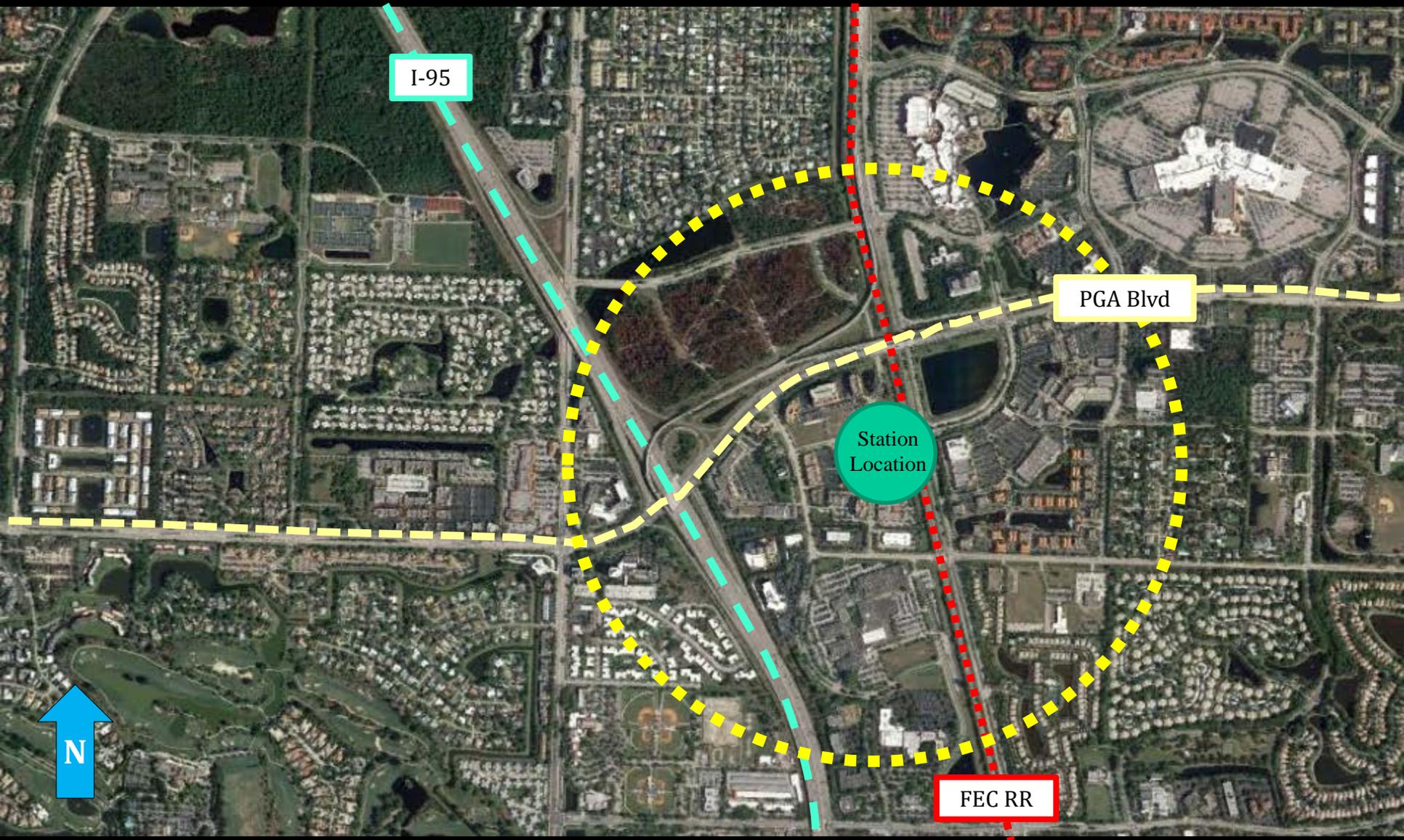


FACILITATED BY TREASURE COAST REGIONAL PLANNING COUNCIL

*Agency Partners include City of Palm Beach Gardens, Tri-Rail/SFRTA,  
FDOT, FTA and South Florida & Treasure Coast RPCs  
Workshop Sponsorship from PGA Corridor Association*

TOD DESIGN UPDATE ~ OCTOBER 2018

# Palm Beach Gardens Station Area



1/2 Mile Radius



## 1. Miami-Link Segments

1A: Service into Downtown Miami  
*Begins Fall 2019*

1B: Downtown Miami to Aventura  
*Planning Underway*

## 2. Jupiter Extension Segment

West Palm Beach to Jupiter  
*Planning 2019?*  
*Needs Local Financial Commitment*

## 3. Central Segment(s)

West Palm Beach to Aventura  
*Planning TBD*  
*Needs Local Financial Commitment*



# *What We Heard ...*

City needs a Tri-Rail station to be **connected with the region.**

Provide mobility for gated communities – **“penetrate the gate.”**

City is aging – increasing number of **elderly** who cannot drive.

Need to allow people to **gracefully “age in place.”**

Opportunity to **connect the “nodes”** in station area (mall, college, station).

Resident **concerns about traffic** and intersections.

Need **more shade for sidewalks and pathways.**

We should use the **parkway system** for access.

There should be **public gathering spaces** at station and nodes.

**Need access** to/from retail, office, residential, medical, PB State College.

# *What We Heard ...*

Access to transportation is a problem for **workers & PBSC students**.

How will the City handle **cost-sharing** (residents, businesses)?

City's **Mobility Fees** will replace Impact Fees – what should they fund?

Need **essential services housing** (police, fire, teachers, medical).

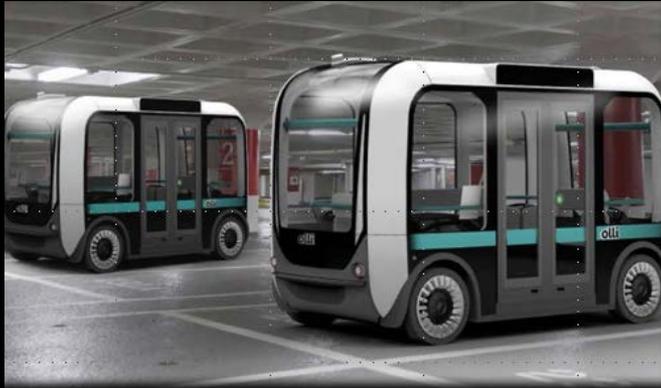
How do we add more **safe bike routes**? Safe crossings? Golf cart pathways?

Rethink **parking standards and quantities** with mixed-use development.

Mobility is a benefit to **businesses and residents**.

**Trolley routes** – inner loop (station area) and city-wide (E/W along PGA)?

How to handle **ride-sharing** – Uber, Lyft, etc.?



# Mobility in the New Millennium

# What is Transit Oriented Development (TOD)?

## TOD is ...

- Development within  $\frac{1}{4}$  to  $\frac{1}{2}$  mile of Station or along Transit Corridor (10-minute walk)
- Mixed-Use with Higher Density & Intensity than Surrounding Area
- Pedestrian & Bike-Friendly
- Controlled Parking
- Streetscapes & Site Design focused on Pedestrian Flow



# TOD vs. TAD



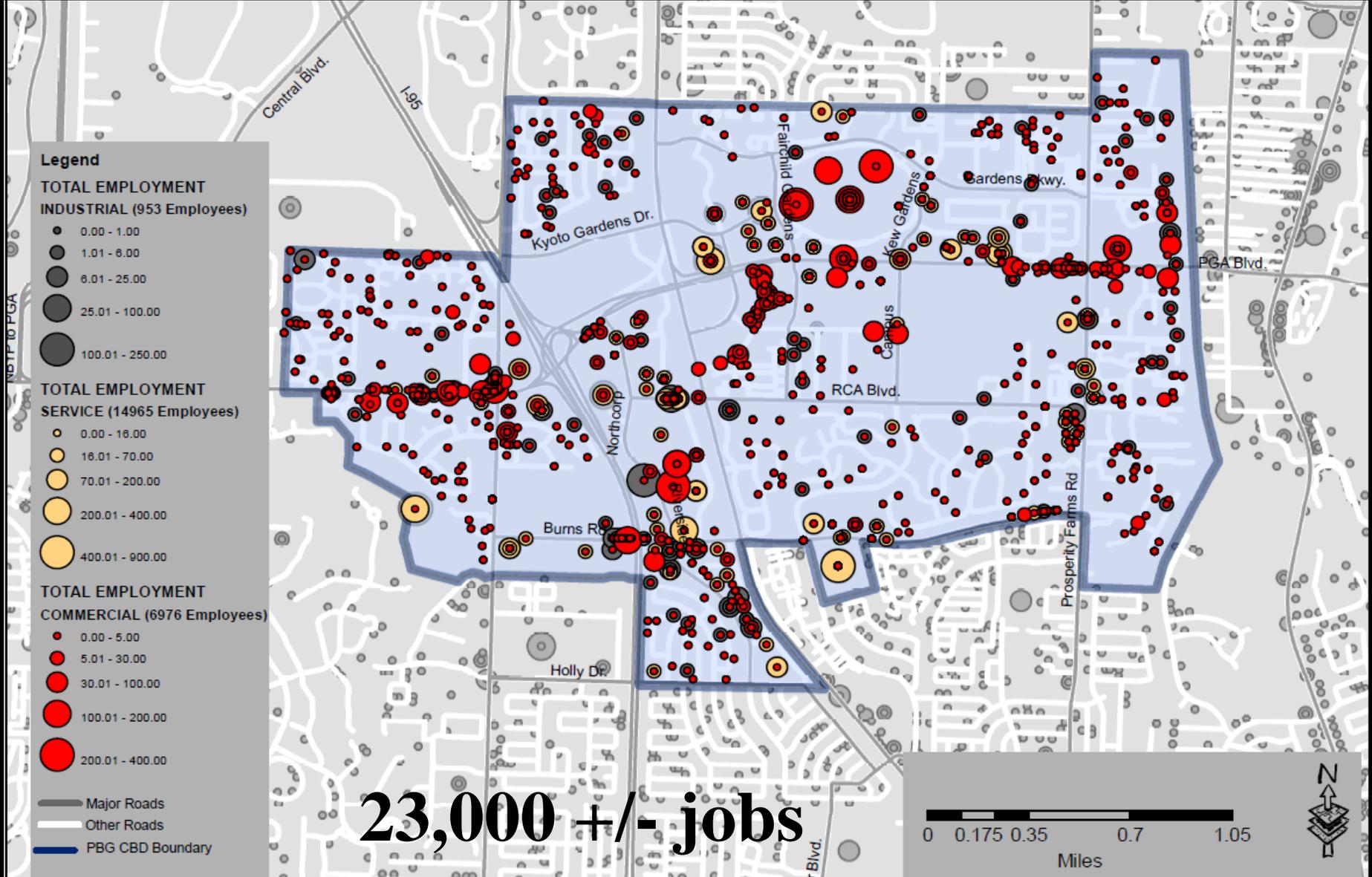
- Transit Oriented Development

vs.

- Transit Adjacent Development

- *Auto-oriented uses*
- *Large surface parking lots*
- *Disconnected from adjacent sites; internally focused*
- *Pedestrian unfriendly*
  - *Suburban office campuses*
  - *Big-box format retail*
  - *Storage facilities & industrial*

# Palm Beach Gardens Central Business District



Source: InfoGroup 2013. Map prepared by Palm Beach MPO (Rev.2/5/2014)

# Mobility in the Gardens

## Palm Beach Gardens TOD Market Study

WTL+a

### Market & Economic Analysis

Palm Beach Gardens TOD Station Area Master Plan  
Palm Beach Gardens, FL



Prepared for:  
Treasure Coast Regional Planning Council  
Stuart, FL

On behalf of:  
City of Palm Beach Gardens  
Palm Beach Gardens, FL

May 2018

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In association with:

RDS  
Retail &  
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Strategies

Arlington, VA

# Why a Market Study?

- Analyze demographic trends & real estate market conditions
- Translate growth forecasts into supportable uses for sites in TOD study area:
  - Housing
  - Hotel rooms
  - “Workplace”—office, R&D/flex
  - Supporting services—retail
- Ensure TOD planning concepts are grounded in economic & market realities
- Inform decisions related to public policies that support TOD



# Demographics: 'Drivers' of Demand

- Palm Beach Gardens in 2017:
  - 54,700 residents
  - 25,700 households
- Since 2000, the City added 19,000 new residents in **10,100 new HHs**
- Forecast growth will be strongest in two age cohorts:
  - 65 to 74 & 75+
- Median age is increasing:
  - City 50.6 → 51.8
  - County 45.5 → 46.2
- **Forecasts suggest growth will moderate**; how will it translate into *demand* for new housing?
  - 2022 **1,960 new HHs**



The Gardens is **one of the fastest-growing communities** in the County

# Understanding the City's Economy

- Average annual HH incomes well-above County:

	<u>City</u>	<u>County</u>
2017	\$110,700	\$85,900
2022	\$123,400	\$96,900

- HHs spend \$25,400 per year on retail

- Significant retail *in-flow* into PBG:

Annual Store Sales	\$1.38 billion
HH Spending	<u>\$ 906 million</u>
<b>Annual Retail In-flow:</b>	<b>\$ 470 Million</b>

- 39,600 jobs in 3,100 businesses  
(6% *share* of County)

- Jobs-to-population ratio reflects strong economy:

○ City	0.72
○ County	0.46



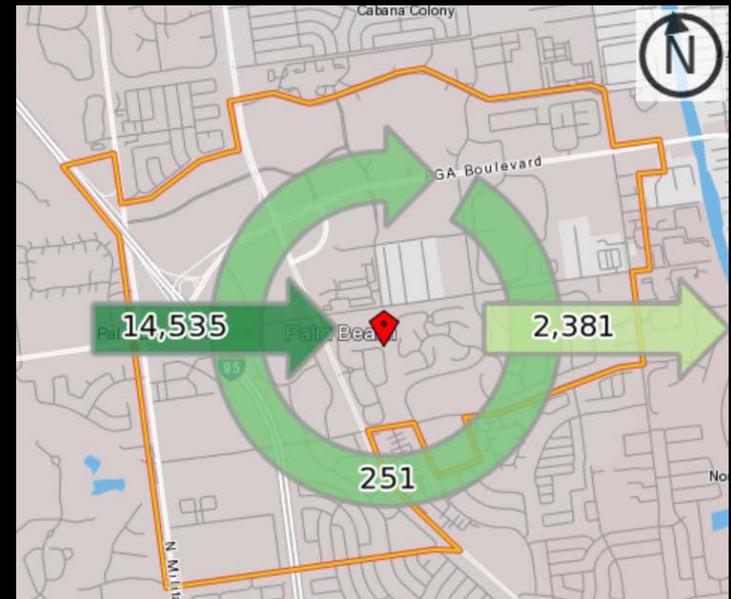
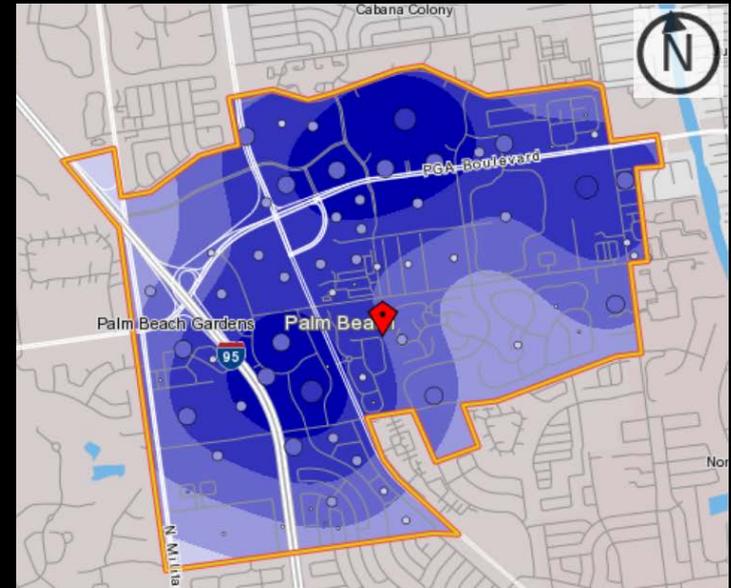
# Understanding the City's Economy

- U.S. Census data indicate *declines* in employees in two key age groups:

Age Cohort	2006	2015	Amount
<b>City</b>			
29 or Younger	9,554	7,185	(2,369)
30 to 54	17,703	15,711	(1,992)
55 & Older	5,158	6,968	1,810
<b>Subtotal:</b>	<b>32,415</b>	<b>29,864</b>	<b>(2,551)</b>

- Core Area** comprises **50% of all jobs** in the Gardens

Age Cohort	2006	2015	Amount
<b>Core Area</b>			
29 or Younger	5,119	3,729	(1,390)
30 to 54	8,150	7,730	(420)
55 & Older	2,478	3,327	849
<b>Subtotal:</b>	<b>15,747</b>	<b>14,786</b>	<b>(961)</b>



# Your Housing Market



# Market Conditions: Housing

- 30,500 housing units includes 2,700 units for “seasonal” use
- Significant recovery from recession—stabilized market conditions since 2010:
  - 2010: 5.1%
  - 2017: 5.2%
- Average housing value: **\$429,800**
- Annual housing starts past 18 years:

○ 2000-2008	907 units/year
○ Recession	135
○ 2009-2017	404
- 69% of all new housing is single-family



**NEW CONSTRUCTION**  
**in Palm Beach Gardens**



# Your Office Market



# Market Conditions: Office

- Citywide office inventory: 2.5 million SF (11% of County):
  - Declining vacancies—from 13.5% (2014) to **10.3%** (2017)
  - Average annual net absorption—**76,700 SF/year**
- At this pace, 4 years required to achieve stabilized occupancies
- Core Area office metrics:
  - 1.1 million SF in 26 buildings
  - Declining vacancies—from 20% (2012) to **15.6%** (2017)
  - Average annual net absorption—**13,925 SF/year**
- Core Area comprises 43% of City's office inventory but 54% of vacancy



# Market Conditions: Office

- Significant entitlements of **3.2 million SF** approved citywide:
  - Alton 500,000 SF
  - Avenir 2,000,000 SF
  - Core Area **615,900 SF**
- Approved projects in Core Area:
  - Gardens Corp. Center—223,940 SF (2019/2020)
  - PGA Station PUD—227,000 SF
  - 4 others with unknown dates
- **How strong is market response in *pre-leasing*?**
- Pending FPL project likely to impact Core Area:
  - 250,000 SF built to “Cat 5”
  - 1,000 employees
  - Secure campus

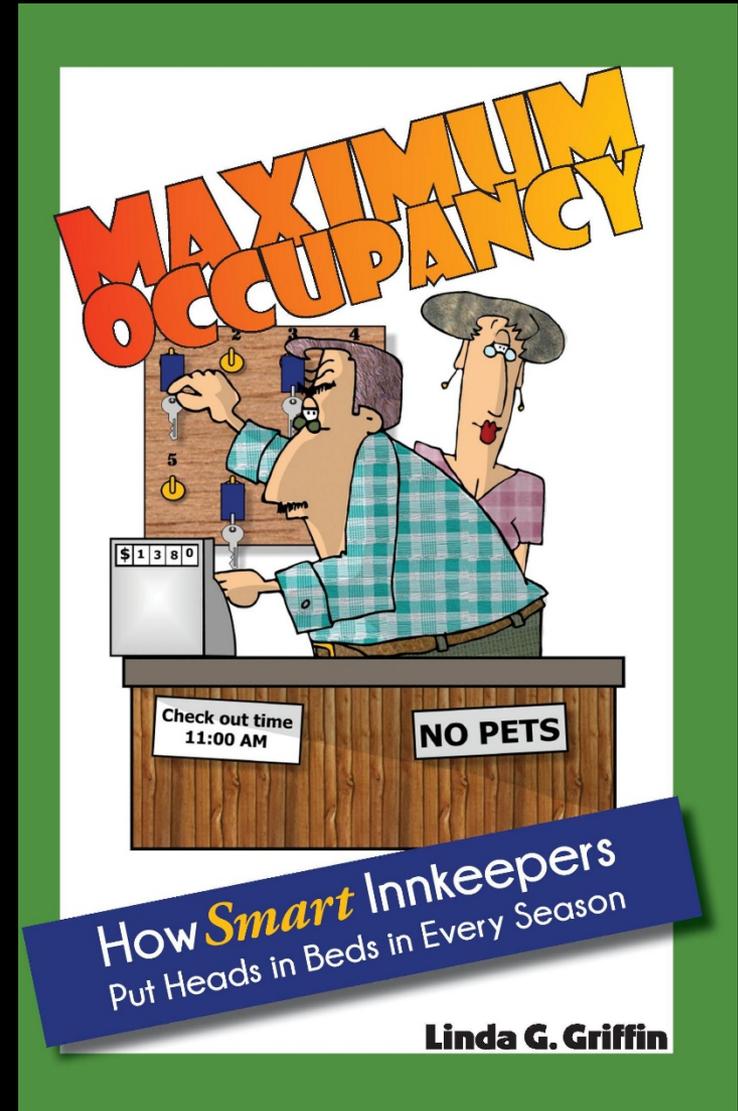


# Your Hotel Market



# Market Conditions: Hotel

- 16,900 rooms in Palm Beach County
  - **1,625 rooms** in the Gardens in 9 properties
  - 9.6% share of County inventory
- Mix of hotel levels (as defined by STR): Midscale, Upper Midscale, Upscale & Upper Upscale
- Other competitive market supply adds 594 rooms:
  - North Palm Beach
  - Jupiter
  - Juno Beach
- Total competitive inventory:  
**2,219 rooms**



# Market Conditions: Hotel

- Key market performance metrics as tracked by STR:
  - Average annual occupancy (6 years)
  - Average daily rates (ADRs)
  - Revenue per available room (RevPAR)
  - Growth in competitive supply
- To finance new hotels, the capital markets require:
  - *Sustained* annual occupancies of **65% to 72%**
  - Stable or increasing ADRs



# Your Retail Market



# Market Conditions: Retail

Palm Beach Gardens is a powerful regional shopping destination, with over **2.3 Million SF** of retail in the **Core Area** alone

The Gardens Mall—  
1.4 million SF

Downtown at the Gardens—  
340,000 SF

Legacy Place—500,000 SF

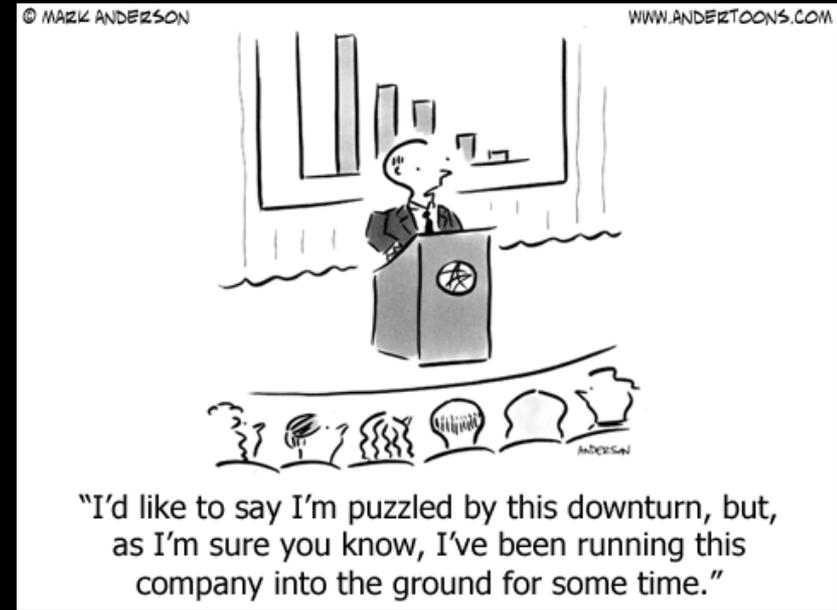
Palm Beach Gardens  
Center—45,000 SF



# Retail: A Changing Industry

The U.S. retail industry is in a period of **major change**:

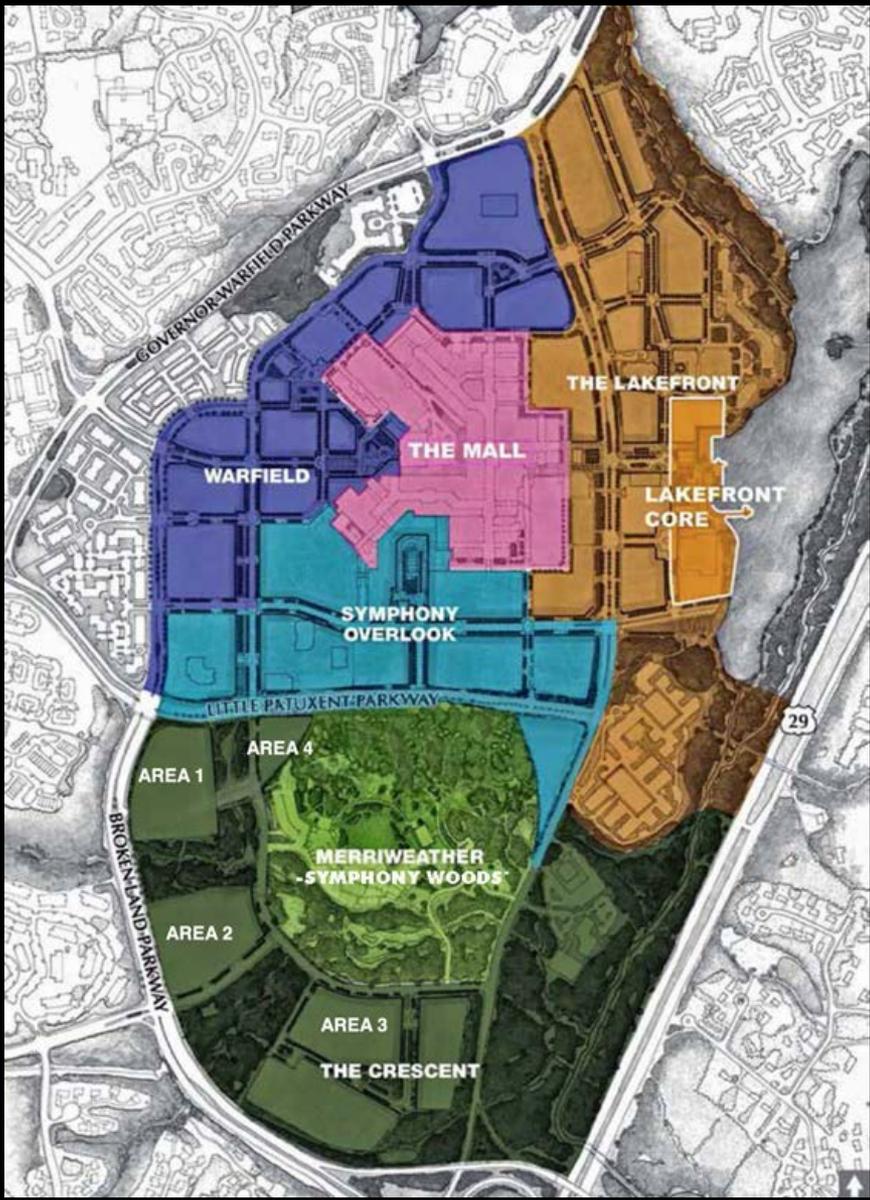
- Significant oversupply:
  - U.S.—26 SF per capita
  - Europe—2.6 SF per capita
- Traditional suburban retail planning is evolving:
  - Enclosed malls with surface parking converting to mixed-use, walkable places
  - Gardens Mall has 7,000 surface spaces
- Changing consumer markets:
  - Boomers & Millennials
  - Retail chains closing or evolving in response
- Impact of on-line shopping vs. “sticks & bricks”



# Case Study: Tysons Corner



# Case Study: Mall at Columbia, MD



# Case Study: Independent Art House/Cinema

Both new & established operators:

- iPic Theaters (Boca Raton):
  - 16 theaters, 121 screens, 10 states
- Angelika Film Centers:
  - 5 theaters, 4 states
  - International affiliations & live performances
- Alamo Draft House:
  - 29 theaters, 300 screens
  - Craft beers, local chefs
- Violet Crown Theaters:
  - 3 theaters in 3 states
  - Reserved seats, bar & food
- Landmark Theaters:
  - 56 theaters, 269 screens, 29 U.S. markets



# Market Potentials



# Market Potentials: Housing

- Significant entitlements approved citywide:
  - Core Area 595 units
  - Outside Core 5,600 units
- Buildout depends on growth:
  - **10 years** IF City's historic growth continues (2000-2017) of  $\pm 600$  HHs/year
- May require in-fill strategies to accelerate new construction in Core Area

## TOD Program:

Up to **1,900-2,400 Units**

25 to 30+ year buildout



# Market Potentials: Office

- Significant entitlements approved citywide:
  - Core Area 615,900 SF
  - Outside Core 2.6 Million SF
- DEO forecasts 81,600 new jobs in Palm Beach County next 8 years
  - **4,600 new jobs** IF City maintains its 5.6% share
- Does *not* include potential impacts of owner/user projects: FPL, UTC
- May require focused **economic development strategies** to increase demand in Core Area
- Growth in office-using sectors translates into 343,600 SF of gross demand
- **Citywide Net Demand (2016—2024): 282,000 SF**



# Market Potentials: Hotel

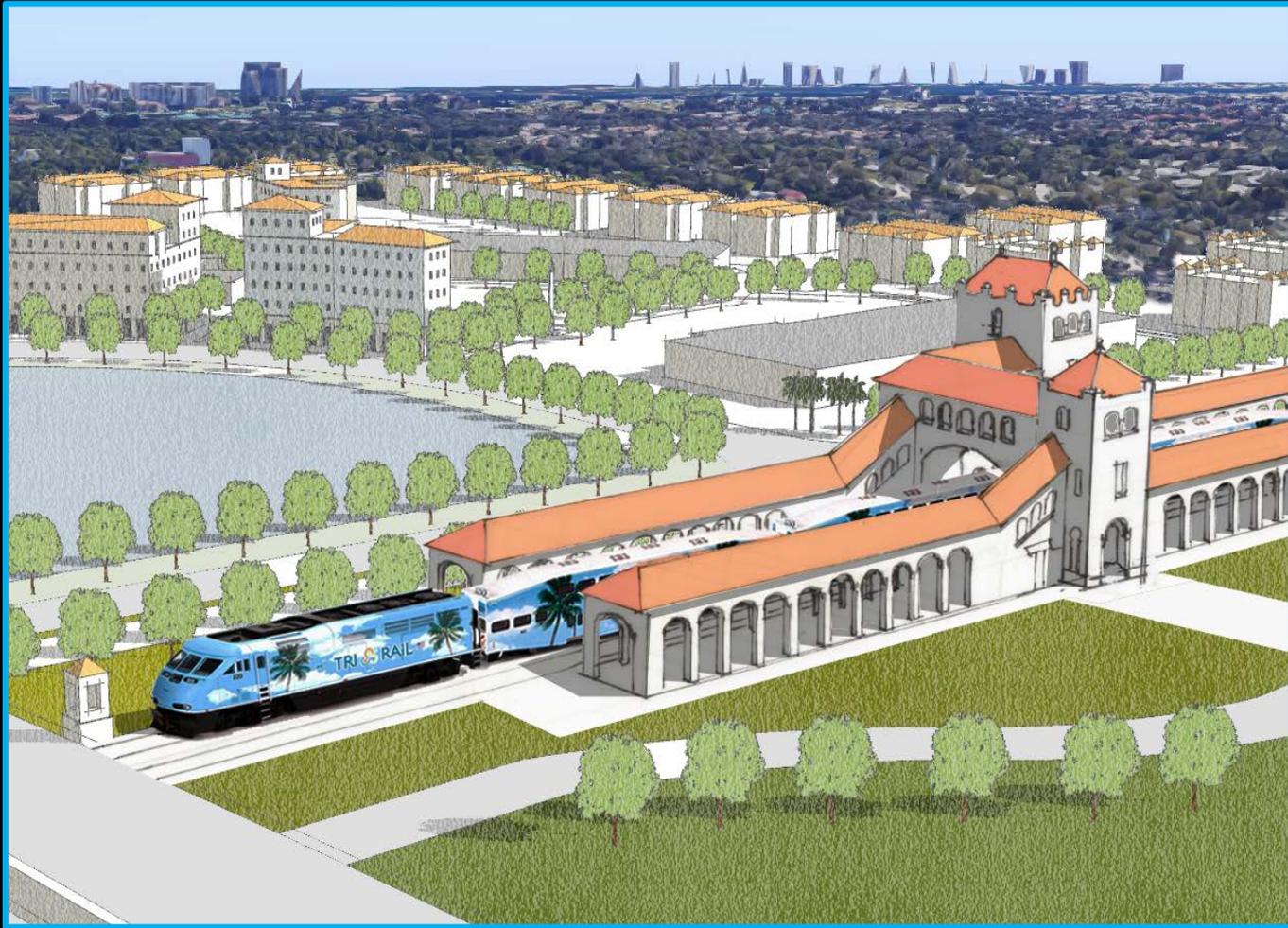
- **STRONG** market performance (2011-3Q/2017):
  - Average annual occupancy increased from 73.4% (2013) to **77.6%** (2017)
  - ADRs increased from \$117 to almost \$143 per room per night
  - RevPAR increased from \$86 to over \$110 per room per night
- **Potential for additional hotels, BUT...**
- **900+** new rooms planned or proposed:
  - Downtown at the Gardens—180 rooms
  - PGA Station PUD—121 rooms
  - Alton—300 rooms
  - Avenir—300 rooms
- Potential impacts on demand generated by FPL project & sporting events not fully documented

# What Did We Learn?

- Transit *does* add value
- Benefits don't happen overnight – they happen over time
- Density doesn't always mean height
- Change can mean 'better'
- Adding the right type of housing – in the right location - can reduce commuter traffic
- Infill development protects existing taxpayers

# Mobility in the Gardens

## Palm Beach Gardens ~ Station Area TOD Plan



Station Area “Opportunity Tour”



**PGA Station - Transformation (looking west)**



**PGA Station - Transformation (looking west)**



**PGA Station - Transformation (looking west)**



**PGA Station - Transformation (looking west)**



### **Concept Details**

- **Introduces Hotel, Residential & Other Uses to Highly Visible Site**
- **Maximizes Benefit of Station to City**
- **Enhances FPL, Core City Uses**
- **Utilizes Internal Roadway Connections**

**PGA Station - Transformation (looking west)**



**Loehmann's Plaza - Transformation (looking west)**



**Loehmann's Plaza - Transformation (looking west)**



**Loehmann's Plaza - Transformation (looking west)**



**Loehmann's Plaza - Transformation (looking west)**



### **Concept Details**

- **Introduces Hotel, Residential & Other Uses to Highly Visible Site**
- **Largest Potential Hotel Footprint (with meeting space & supporting uses)**
- **Complements Station, FPL, City Core**
- **Captures Regional Traffic Close to I95**

**Loehmann's Plaza - Transformation (looking west)**



**East End of The Gardens Mall – Transformation (looking east)**



**East End of The Gardens Mall – Transformation (looking east)**



**East End of The Gardens Mall – Transformation (looking east)**



**East End of The Gardens Mall – Transformation (looking east)**



**East End of The Gardens Mall – Transformation (looking east)**



**East End of The Gardens Mall – Transformation (looking east)**



**Concept Details**

- 14 +/- acres (+/- 1000 parking spaces)
- Land Use Mix of Residential, Retail, Office, Arts/Theatre, Food/Beverage
- New Uses Parked with Garages
- Improves Mall Competitiveness
- Consistent with National Mall Redevelopment Trends

**East End of The Gardens Mall – Transformation (looking east)**



# A Focus on Connectivity



# A Focus on Connectivity

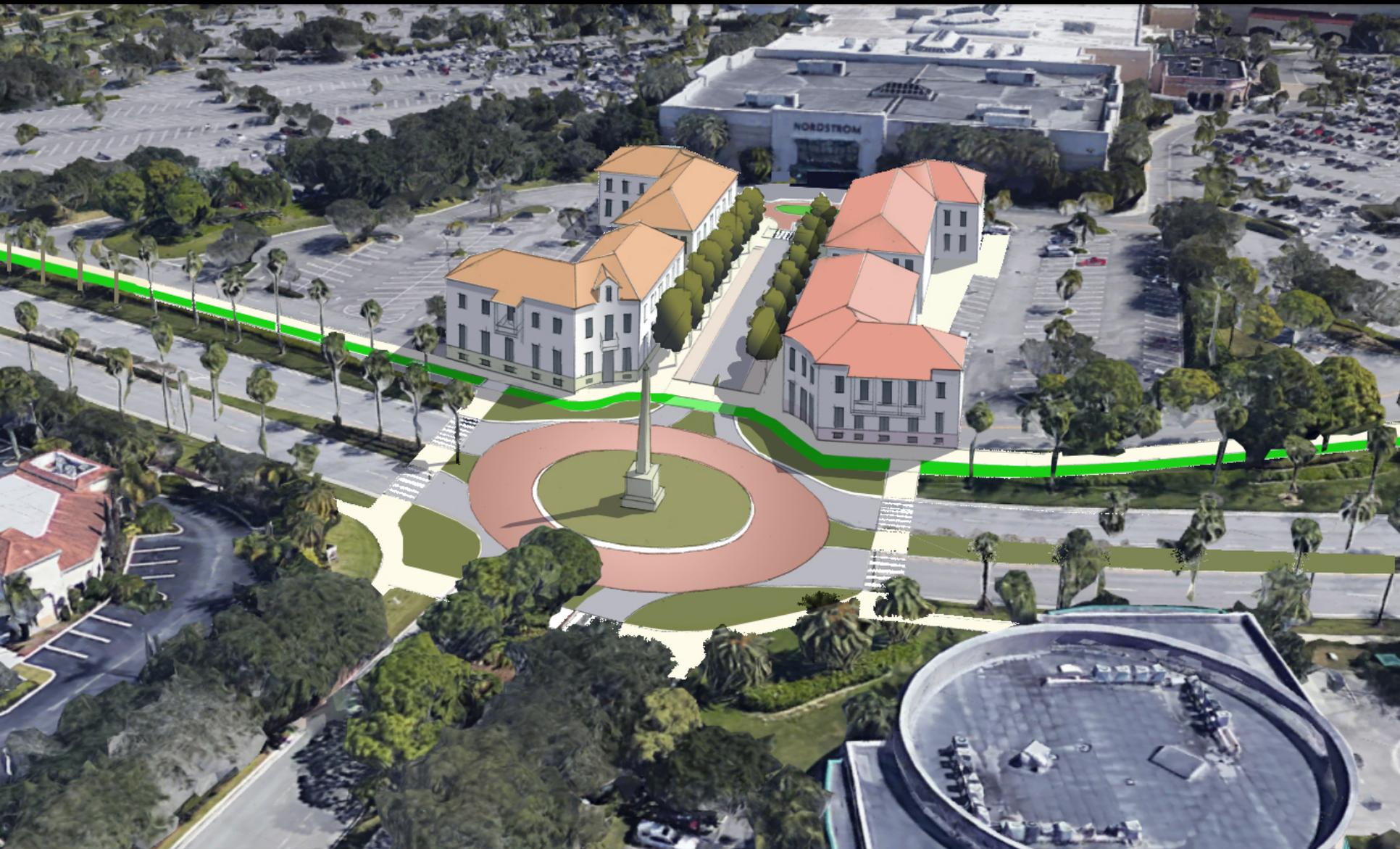


# A Focus on Connectivity

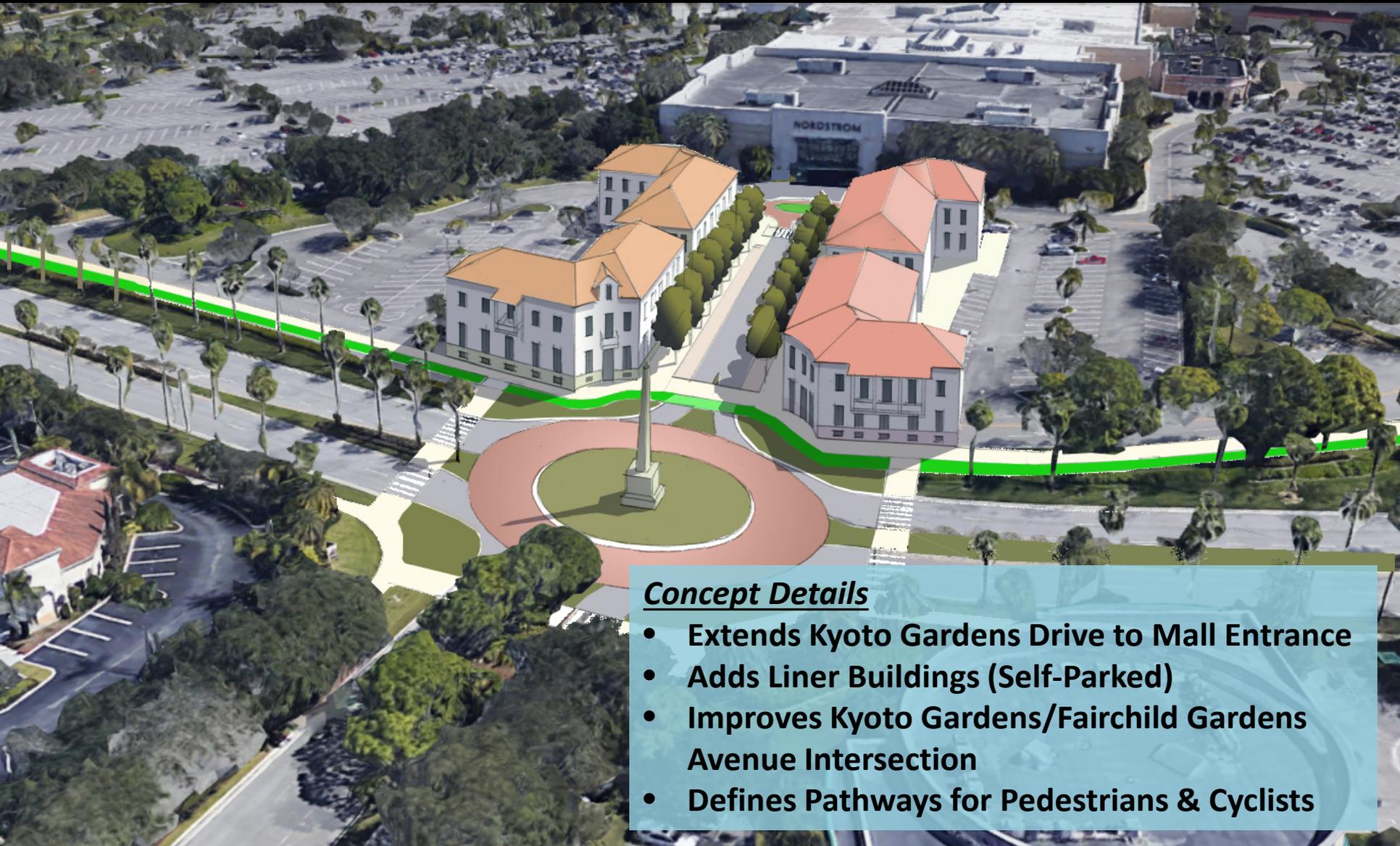




**Kyoto Gardens Drive Extension – Transformation (looking east)**



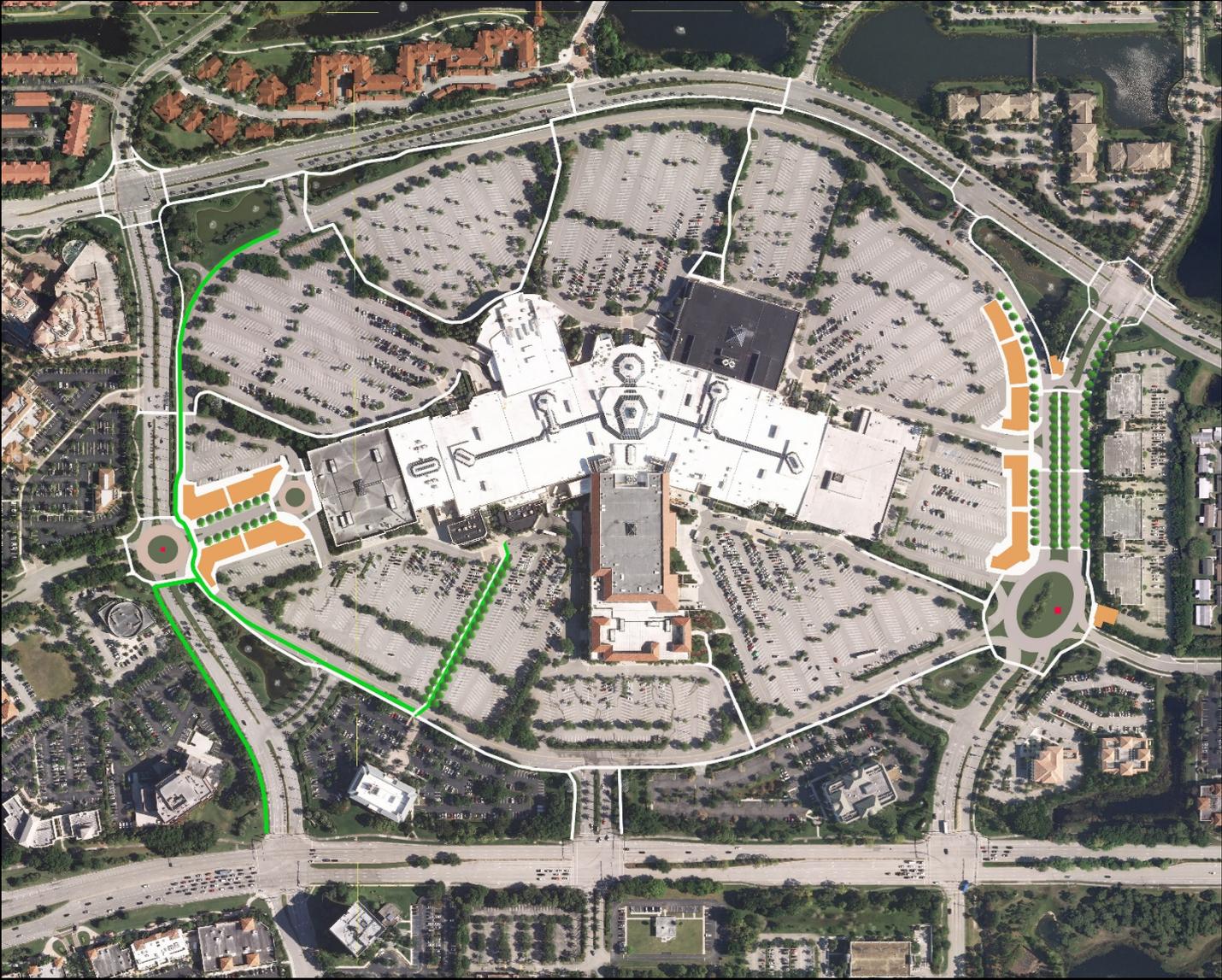
**Kyoto Gardens Drive Extension – Transformation (looking east)**



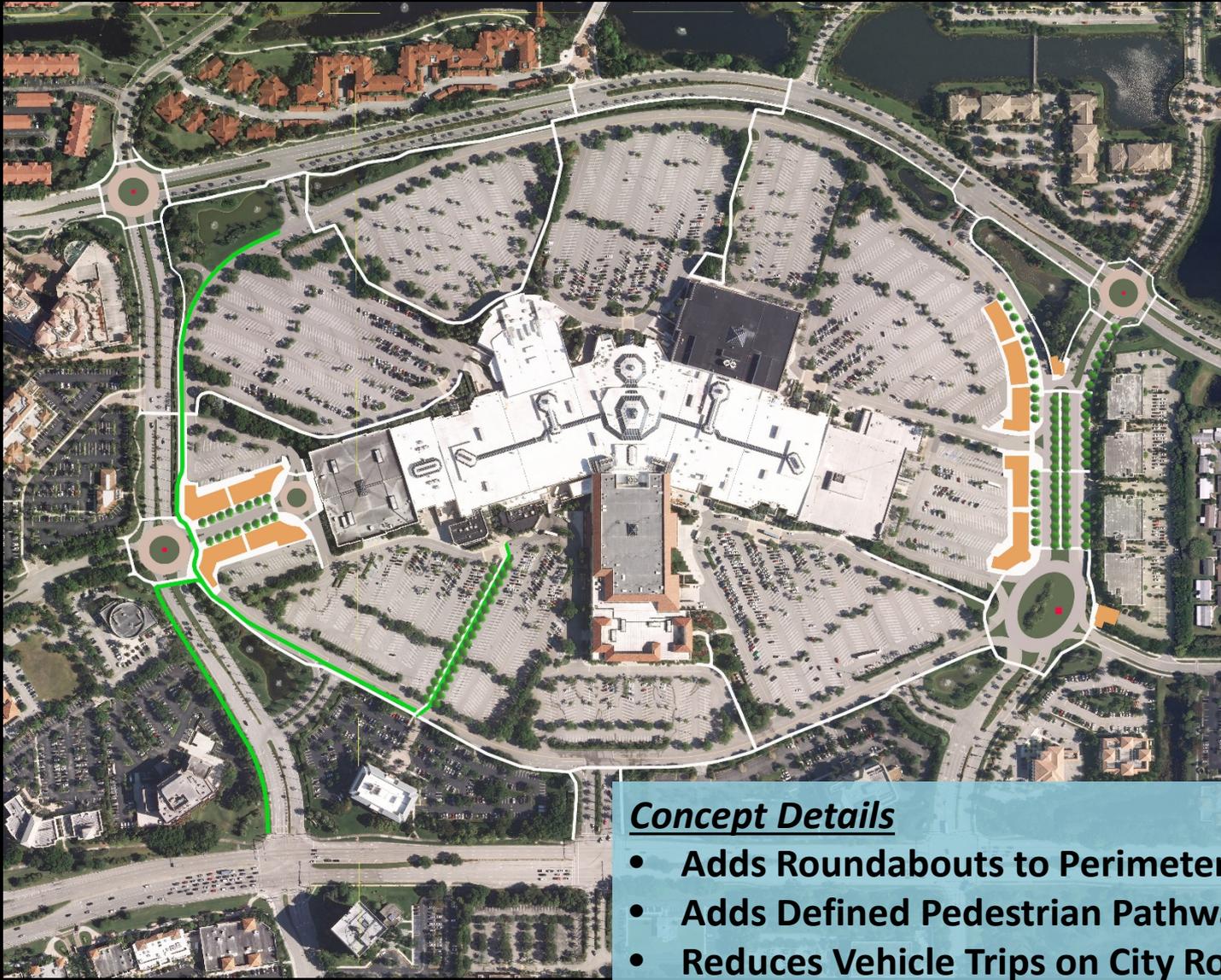
### **Concept Details**

- Extends Kyoto Gardens Drive to Mall Entrance
- Adds Liner Buildings (Self-Parked)
- Improves Kyoto Gardens/Fairchild Gardens Avenue Intersection
- Defines Pathways for Pedestrians & Cyclists

**Kyoto Gardens Drive Extension – Transformation (looking east)**



The Gardens Mall Access - Transformation



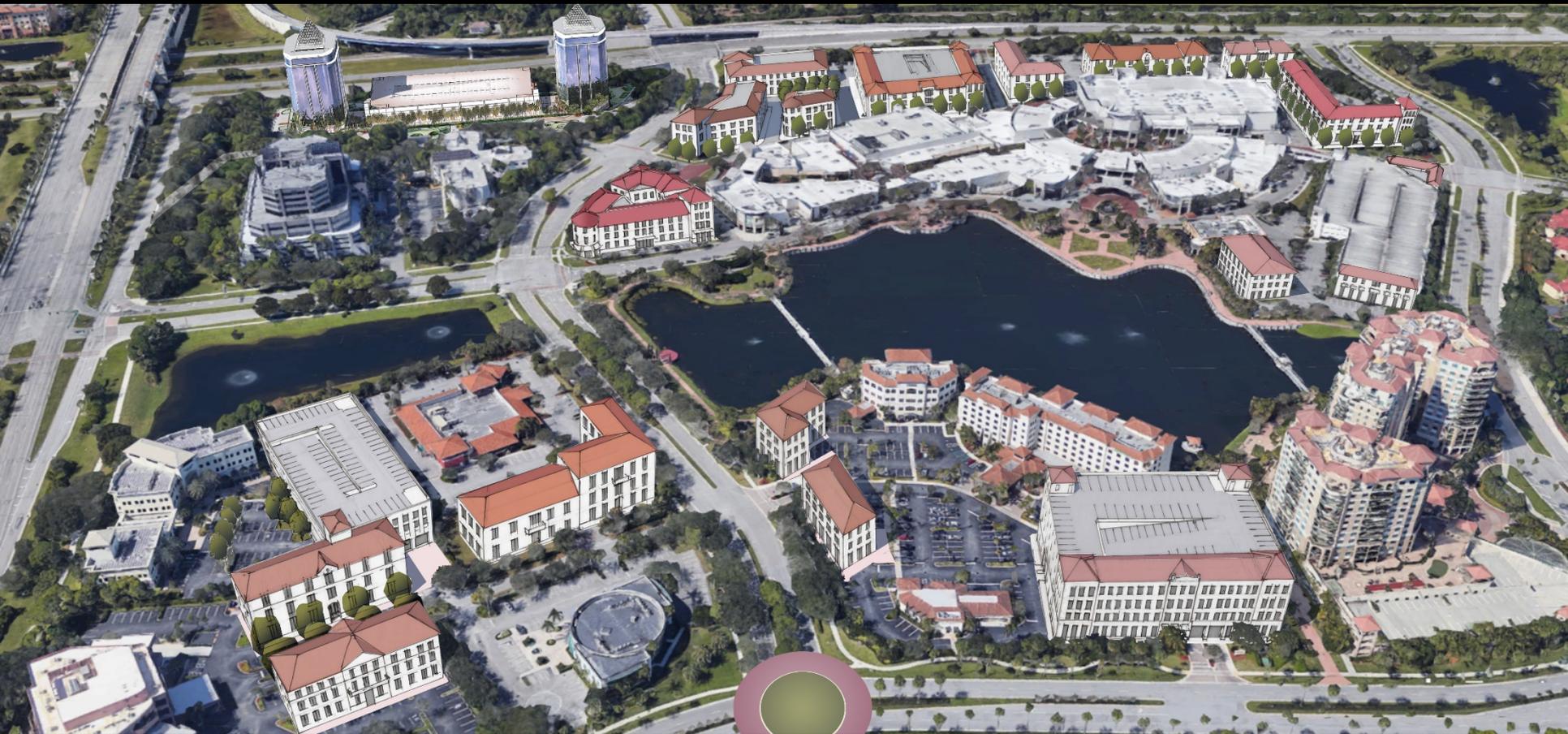
### ***Concept Details***

- Adds Roundabouts to Perimeter Road
- Adds Defined Pedestrian Pathways
- Reduces Vehicle Trips on City Roads
- Improves Connections to Adjacent Sites

## **The Gardens Mall Access - Transformation**



**Kyoto Gardens Drive (looking west) – Transformation**



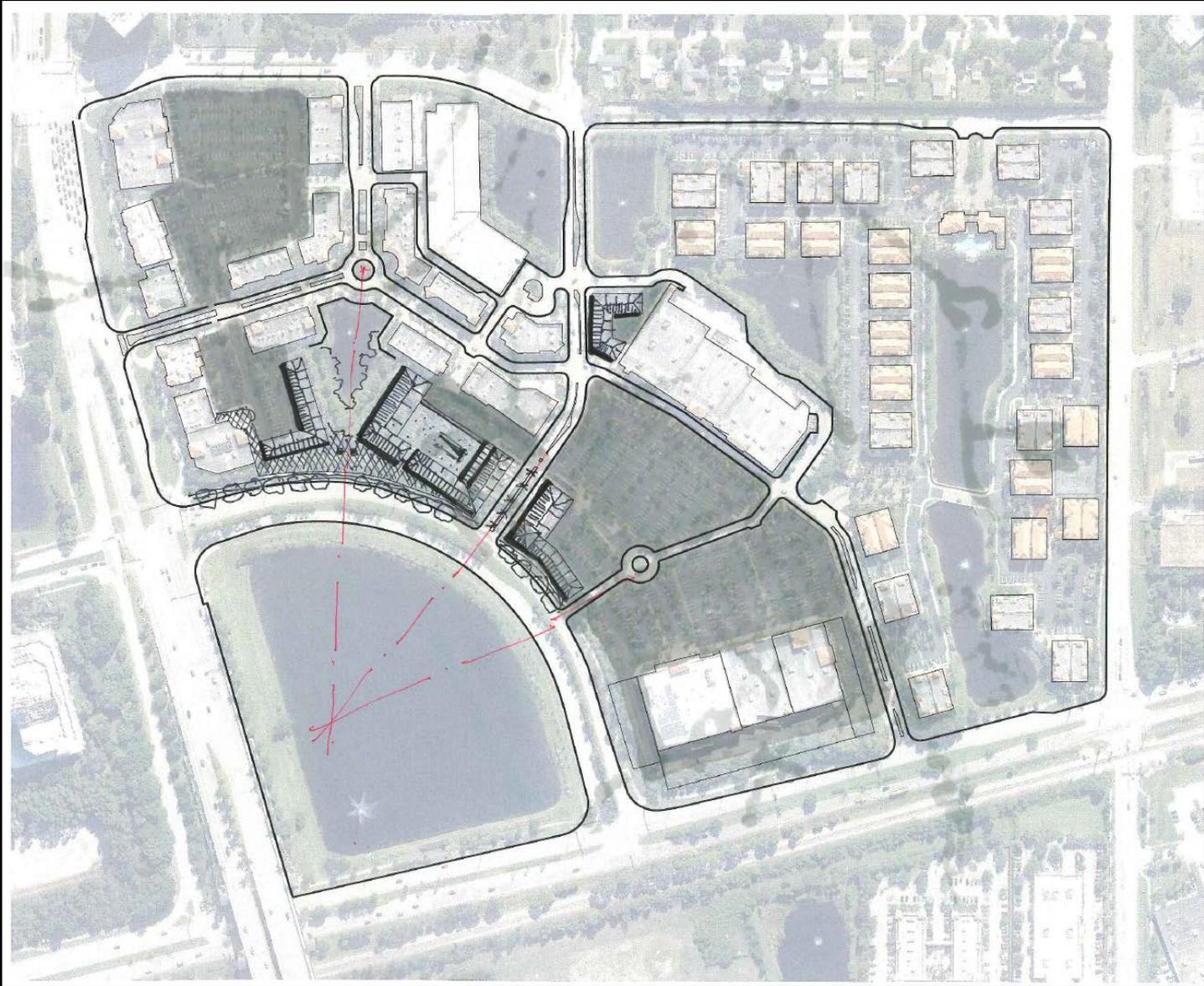
**Kyoto Gardens Drive (looking west) -- Transformation**



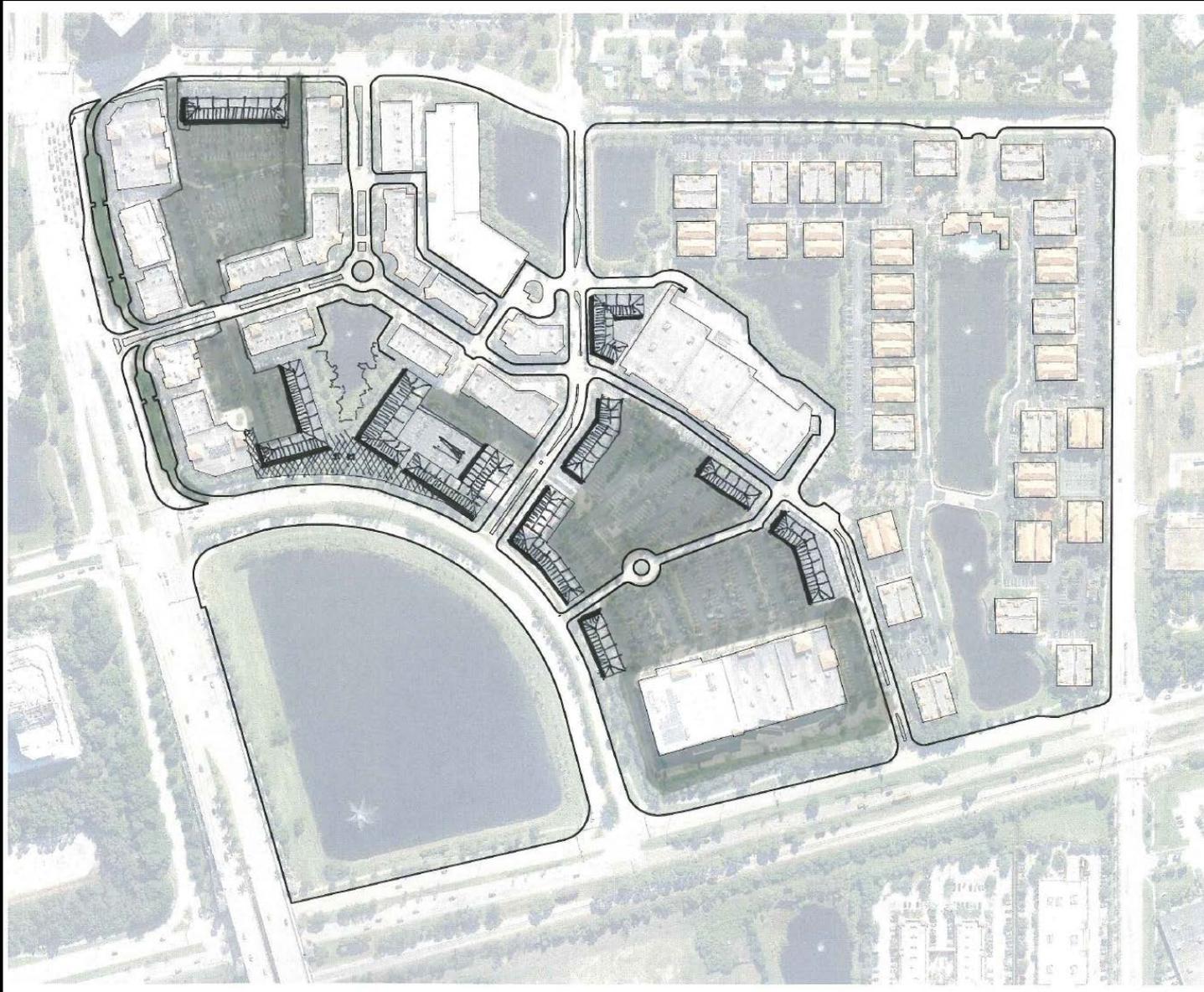
### Concept Details

- Addition of Hotel, Residential, Retail & Office
- Uses Internal Roadway Network
- Improves Pedestrian Connections for Adjacent Sites
- Adds Roundabout for Perimeter Road
- Adds Parking Structures to Address Demand

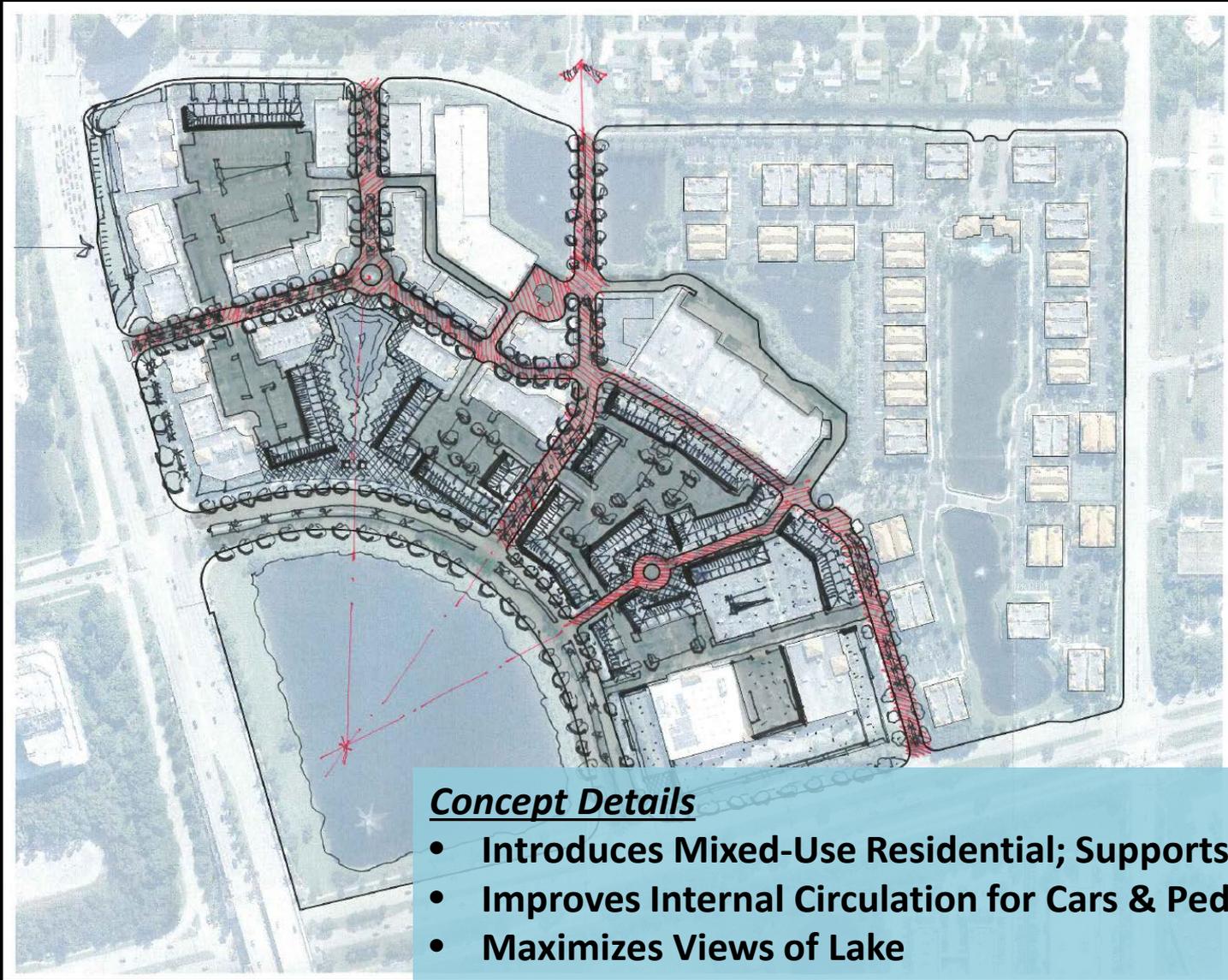
**Kyoto Gardens Drive (looking west) -- Transformation**



**Legacy Place - Transformation**



**Legacy Place - Transformation**

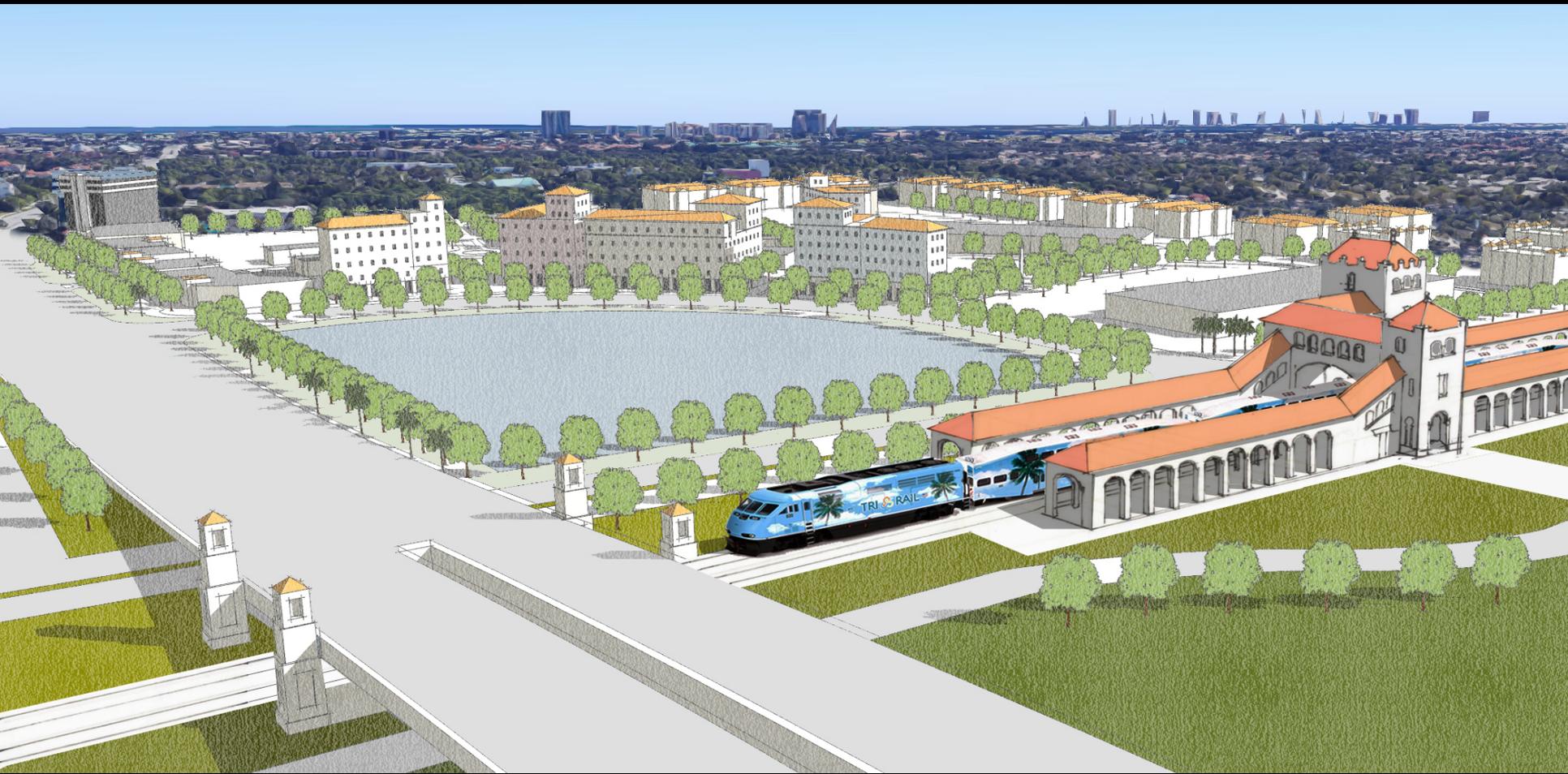


### **Concept Details**

- Introduces Mixed-Use Residential; Supports Retail
- Improves Internal Circulation for Cars & Pedestrians
- Maximizes Views of Lake
- Improves Visibility from PGA & A1A



**Legacy Place - Transformation**



Legacy Place - Transformation

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