Mobility in the Gardens
Palm Beach Gardens ~ Station Area TOD Plan

Project Update
June 2018

Palm Beach Gardens Station Area

½ Mile Radius
City Mobility & Planning Highlights

1. **Miami-Link Segments**
   - 1A: Service into Downtown Miami
     - TIMING: Fall 2018
     - Service 2022?
   - 1B: Downtown Miami to Aventura
     - TIMING: Planning 2018
     - Service TBD

2. **Jupiter Extension Segment**
   - West Palm Beach to Jupiter
     - TIMING: Planning 2018
     - Service TBD

3. **Central Segment(s)**
   - West Palm Beach to Aventura
     - TIMING: Planning TBD
     - Service TBD
What is Transit Oriented Development (TOD)?

**TOD is ...**

- Development within ¼ to ½ 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**
  - Transit Oriented 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

- **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

Legend:

**TOTAL EMPLOYMENT INDUSTRIAL (2013 Employees)**
- 0 - 1,00
- 1,01 - 9,00
- 9,01 - 19,00
- 19,01 - 29,00
- 29,001 - 299,00

**TOTAL EMPLOYMENT MANUFACTURING (2013 Employees)**
- 0 - 1,00
- 1,01 - 9,00
- 9,01 - 19,00
- 19,01 - 29,00
- 29,001 - 299,00

**TOTAL EMPLOYMENT COMMERCIAL (2013 Employees)**
- 0 - 1,00
- 1,01 - 9,00
- 9,01 - 19,00
- 19,01 - 29,00
- 29,001 - 299,00

**Main Roads**

**Other Roads**

**PGB CBD Boundary**

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

23,000 +/- jobs

Source: InfoGroup 2013. Map prepared by Palm Beach MPO (Rev 2/5/2014)
City of Palm Beach Gardens
Station Area Plan
Market & Economic Analysis Overview

City Demographics

Total Population (2017): 54,700 residents (+19,600 since 2000 ... +2.65%)
Total Households: 27,600 households (+ 10,100 since 2000 ... +2.99%)
Largest Increase in Two Age Cohorts: 65-74 and 75+
Median age: 50.6 (rising to 51.8 by )
    (PB County is younger ... 45.5)
Average HH Income: $110,700/year (2017) rising to $123,000 (2022)
Average household size: 2.12
10-yr forecast: 6,400 new residents (7,700 new units)
Annual demand forecast: 770 units/year

Population Forecast:
Nearly 4,300 new residents in
1,960 new households by 2022
City Employment Base

- 39,600 jobs in 3,100 +/- registered businesses (5.6% of the 670,000 f/t jobs in PB County)
- Fair Share Growth: 4,600 new jobs (thru 2024)
- City still recovering from recession (-2,500 jobs)

Forecasts indicate declining # of employees in two key age groups

- **Ages 29 & younger:** -3.1%/year (-2,400 employees)
- **Ages 30-54 years:** -1.3%/year (-2,000 employees)
- **Ages 55+ years:** +3.4%/year (+1,800 employees)

Market Potentials: Workplace/Office

- **Citywide office space:** 2.5M SF (10.3% of County)
- Detailed survey of 25 office buildings in/around Core Area
- Trend towards declining vacancies (down to 15.6% in 2017)
- Overall absorption (2012-2017):
  - 76,700 SF/year City-wide
  - 14,000 SF/year in Core Area
- Reflects continued recovery from the recession
- **Net demand through 2024:** 282,000 SF
Market Potentials: Workplace/Office

- Considerable existing office entitlements City-wide (2.7M SF)
- Dispersed within Core Area (615,900 SF) plus western sites
- Pending FPL development likely to impact the Core Area
- May require focused economic development strategies to increase demand in Core Area

### CORE AREA

<table>
<thead>
<tr>
<th>Project</th>
<th>SF</th>
<th>Delivery Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gardens Corp. Ctr. (DeWaters)</td>
<td>223,943</td>
<td>Under Construction</td>
</tr>
<tr>
<td>Northcorp. Embassy/Freeport</td>
<td>50,000</td>
<td>Unknown</td>
</tr>
<tr>
<td>Northcorp. Lot 12 Vacant</td>
<td>4,000</td>
<td>Unknown</td>
</tr>
<tr>
<td>Nova SE University</td>
<td>75,000</td>
<td>Unknown</td>
</tr>
<tr>
<td>PBG Medical Ctr. Office</td>
<td>35,675</td>
<td>Unknown</td>
</tr>
<tr>
<td>PGA Station PUD</td>
<td>227,000</td>
<td>Unknown</td>
</tr>
<tr>
<td><strong>TOTAL (SF):</strong></td>
<td>615,908</td>
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</table>

Market Potentials: Retail

- Well-established regional retail destination
- Affluent population plus retail spending inflow supports retail core
- Inflow of retail $ creates opportunity to change retail mix/type
- Changing retail trends will demand evolution of retail types
  - Downtown/District redesign/rebranding
  - The Gardens Mall redesign opportunity

### CITY-WIDE RETAIL SPENDING STATISTICS

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>Average Annual HH Retail Spending</td>
<td>$25,400/year</td>
</tr>
<tr>
<td>Total City Annual HH Retail Spending</td>
<td>$650.9 Million/year</td>
</tr>
<tr>
<td>Annual Retail Spending Inflow</td>
<td>$470 Million/year</td>
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</table>
Market Potentials: Hotel

- Current City inventory is 1,625 rooms (9.6% of PBC) (9 different properties)
- 6-year trend = 75% occupancy → supports new hotel financing
- **Potential for up to 3-4 new hotels through 2026** (2 already proposed within study area)
- Hotel market strengthened from large-scale visitor events & strengthening commercial employment base
- Hotel sites enhanced by I95 visibility and proximity to future station

Market Potentials: Housing

- Average Value (2017) for all housing units; $429,800
- Seasonally-owned units: 2,700
- True vacancy (2010) = 1,404 units (5.1%)
- Housing Market is stabilized (5% is standard)
- Housing starts past 10 years = +2,196 units (220 units/year)
- **TOD Program: Up to 1,900-2,400 new units (25-30+ year buildout)**
- Considerable existing entitlements City-wide; may require infill strategies to accelerate residential financing in Core Area
Market Potentials: Housing

- Majority of new housing starts = single-family detached
- Trends towards loss of younger employees & increased inbound commuting reinforces development at western edge of City
- Opportunity to improve SF/MF balance with focus on “essential services” housing and continued diversification of housing type

<table>
<thead>
<tr>
<th>Single-Family Detached</th>
<th>Total Starts (2007-2016)</th>
<th>% of County</th>
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<tbody>
<tr>
<td>Boca Raton</td>
<td>988</td>
<td>5%</td>
</tr>
<tr>
<td>Delray Beach</td>
<td>669</td>
<td>3%</td>
</tr>
<tr>
<td>Jupiter</td>
<td>2354</td>
<td>4%</td>
</tr>
<tr>
<td>Palm Beach Gardens</td>
<td>1525</td>
<td>12%</td>
</tr>
<tr>
<td>West Palm Beach</td>
<td>610</td>
<td>3%</td>
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<table>
<thead>
<tr>
<th>Multi-Family</th>
<th>Total Starts (2007-2016)</th>
<th>% of County</th>
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<tbody>
<tr>
<td>Boca Raton</td>
<td>2589</td>
<td>17%</td>
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<tr>
<td>Delray Beach</td>
<td>1984</td>
<td>13%</td>
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<tr>
<td>Jupiter</td>
<td>1181</td>
<td>8%</td>
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<tr>
<td>Palm Beach Gardens</td>
<td>675</td>
<td>4%</td>
</tr>
<tr>
<td>West Palm Beach</td>
<td>1232</td>
<td>8%</td>
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Mobility in the Gardens
Palm Beach Gardens ~ Station Area TOD Plan

Station Area “Opportunity Tour”
Station & Parcel 5B Site Transformation (looking west)
Station & Parcel 5B Site 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

Station & Parcel 5B Site Transformation (looking west)

Loehmann’s Site Transformation (looking west)
Loehmann's Site 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

The Gardens Mall Access - Transformation
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

East End of The Gardens Mall, Transformation
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

Kyoto Gardens Drive Extension
Kyoto Gardens Drive (looking west) -- after

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) -- after
Legacy Place, Transformation

**Concept Details**
- Introduces mixed-use residential, supports retail
- Improves internal circulation for cars & pedestrians
- Maximizes views of (name of lake)
- Improves visibility from PGA & A1A
### Next Steps…

<table>
<thead>
<tr>
<th>Month</th>
<th>Event</th>
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<tbody>
<tr>
<td>June 2018</td>
<td>Additional Overview Presentations (as requested)</td>
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<tr>
<td>July/August 2018</td>
<td>Transmittal of Final Report &amp; Market Study</td>
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<td>Council Workshop (as requested)</td>
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Project Info Available:  www.tcrpc.org

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**FOR MORE INFORMATION:**

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