2016-2018 Downtown Access Study

Prepared by Buffalo Place Inc.

For the Access & Infrastructure Committee

1/3/2019

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We're Downtown!

2016 - 2018 Downtown Access Study

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Executive Summary

Introduction

Downtown building owners, managers, and employers report difficulty securing tenants, and housing employees due to an inability to identify available parking. Buffalo Place Inc. responded to this concern and kicked-off a focused review of downtown access in May of 2016. A committee of interested downtown stakeholders was formed, including property owners and managers, leasing agents, realtors, employers, parking, access and infrastructure providers including the City of Buffalo, Erie County, NFTA, NYS DOT, Thruway Authority, GBNRTC, Go Buffalo Niagara, BNMC, and private and not for profit parking operators.

The primary goal of this Downtown Access Study is to support increased occupancy, utilization and vitality of Downtown Buffalo. As determined by the land use inventory in this study, there are currently 5.7 Million square feet of vacant building space Downtown, more than 20% of building space. Of the vacant building square footage, 1.7 million is vacant Class A and B office space. Sufficient access is critical to fill these spaces.

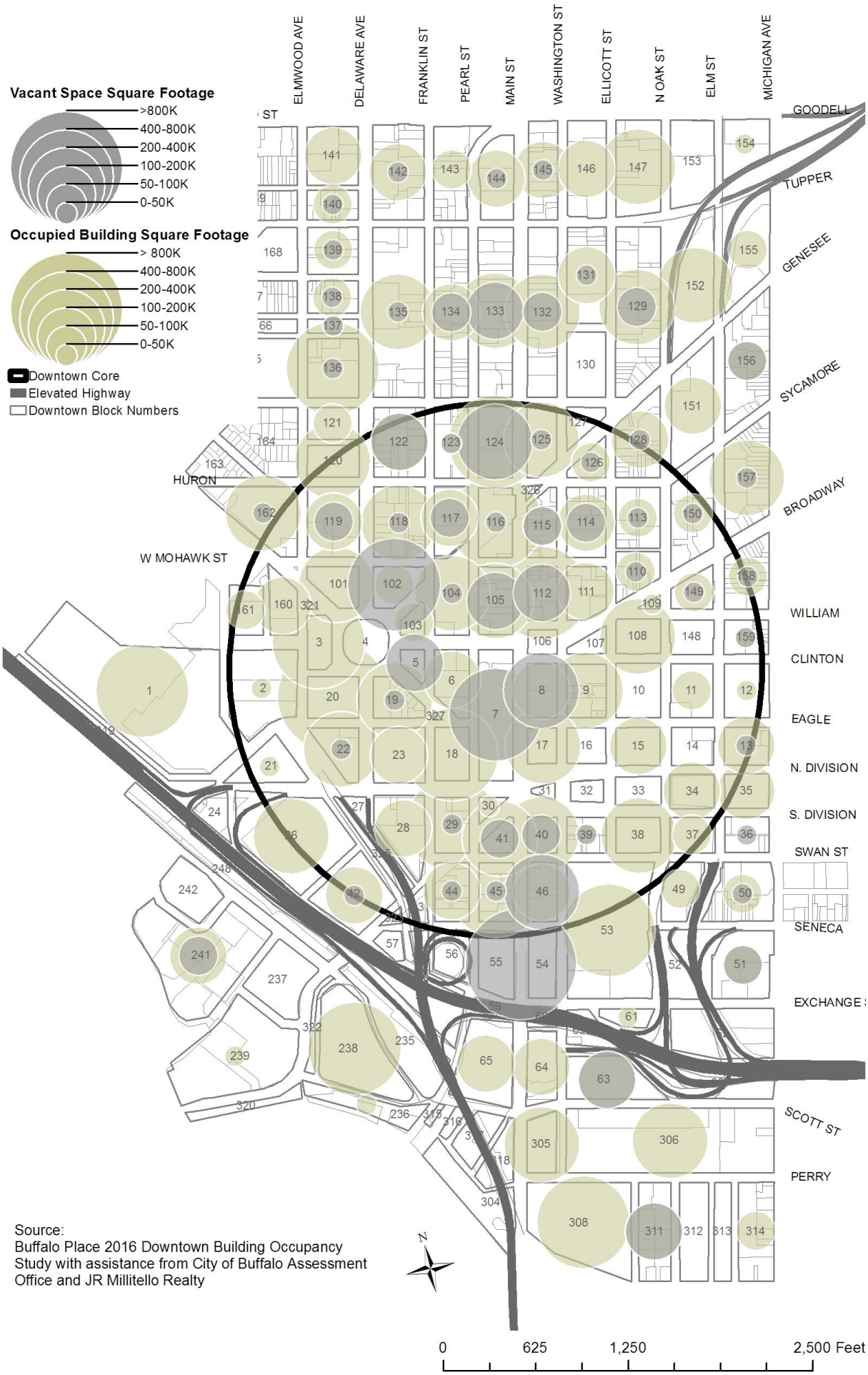
While building managers and realtors emphasized that lack of sufficient parking is an impediment to increasing activity in Downtown Buffalo, other partners encouraged greater utilization of alternate means of access including transit, bicycle travel, and shared automobile use. Using the 2000 Access and Infrastructure Task Group effort, *Destination Downtown Buffalo 2002,* as a model, the committee performed an in-depth dive into downtown access, capturing data on current and potential future demand, as well as access options and current utilization rates. The committee has been guided by the principles of smart design, the access recommendations of the *Queen City Hub Strategic Plan for Downtown Buffalo*, and the Buffalo Green Code.

The Access & Infrastructure Committee developed a list of concerns, desired outcomes and identified the information required to develop effective conclusions (Appendix A1 and A2). Staff proceeded to collect information and to present policy questions to the committee for discussion, evaluation and guidance.

The following map illustrates 2017 Downtown vacant and underutilized space per block in gray, identifying the major properties that motivate this Access initiative. The committee, with a goal of putting fallow space in downtown to work for the community, sought ways to improve downtown access, particularly in blocks where access was seen as a problem for putting to work nearby vacant space or for developing underutilized parcels.

The *Destination Downtown Buffalo 2002* report successfully accomplished its goals. The re-pricing of curb parking, creation of 532 curb spaces, and public investment in the expansion of two parking ramps (+1,400 spaces) set the stage for the last decade of downtown growth, including a 3.86 million increase in building square footage, and a 787,513 SF increase in occupied office space. The access improvements that were brought about by that study have now been fully absorbed. Additional capacity is required to facilitate another round of downtown private sector investment.

Building Occupancy and Vacancy



Source:
Buffalo Place 2016 Downtown Building Occupancy Study with assistance from City of Buffalo Assessment Office and JR Millitello Realty

0 625 1,250 2,500 Feet

Study Method

Access Study Parameters

Study Area

The study area is bounded by South Elmwood / Terrace/ Skyway on the west, Edward/Goodell on the north, Michigan on the east, and the river on the south. See map on page 32.

Peak Hour Study Period

The Access Study investigates Downtown during the Monday to Friday, daytime workweek, the peak time for downtown use of the parking supply and transit services. Downtown evening and entertainment uses on weekends are increasing, but do not approach the capacity issues of the workweek.

Downtown Population –

Estimate of Downtown Buffalo CBD Employment – 2018

Buffalo Place found that we had collected sufficient survey information during the Access Study to make a reasonable estimate of downtown employment. Based on the number of parked cars noted in the 2016 curb and off-street parking surveys, and the Downtown Buffalo 2018 Transportation Mode Survey completed by downtown employees, Buffalo Place estimates total downtown employment of 55,362. Of these downtown employees, 46,135 work during the weekday, peak-hour study period. Details can be found on page 26.

Estimate of Downtown Buffalo CBD Residents – 2018

Based upon the 2012-2016 US Census American Community Survey Five-Year Estimates, BUDC reported occupancy trends, and Buffalo Place's collected housing unit data, Buffalo Place estimates the population within the Central Business District (between Goodell/Edward Streets, Elmwood Avenue, the Michigan Avenue and Elmwood Avenue) to be 2,061 residents. Details can be found on page 28 and in Appendix D.

Estimate of Downtown Buffalo CBD Visitors – 2018

The estimate of downtown visitors during the weekday study period is based on the number of short-term parkers, both at the curb and in lots/ramps, the number of hotel guest based on number of rooms and hotel occupancy rates, and an approximate number of visitors who travel via Metro bus or rail. Buffalo Place estimates that in addition to the downtown workforce, approximately 4,230 people visit downtown each weekday. Details are on page 28 and in Appendix E.

Methodology

Current use of downtown access methods was documented, including:

- Supply and utilization survey of off-street parking
- Supply and utilization of on-street (curb) parking
- Transit ridership and use of pre-tax and corporate pass transit incentives
- Survey of Downtown Employee Transportation Mode
- Supply of public bicycle racks and Reddy Bikeshare facilities

Downtown land uses within the study area were documented. Current demand for parking was calculated for the major downtown land uses during the weekday study period. Demand factors were balanced until they reflected the existing use of downtown parking spaces.

Future development projects mentioned in local media were evaluated and, with the assistance of several downtown developers, a list of projects likely to occur within the next five years was developed, see page 69. The impact of these development projects on downtown parking supply and utilization was calculated.

Commercial office space was tracked over the previous decade to identify occupancy trends. Conservative, moderate and aggressive office-absorption rate trends were identified and applied to Class A and B office spaces with occupancies lower than 85%, the occupancy rate where buildings are essentially fully occupied within normally expected shifts of tenancies. The impact of these office absorption trends on parking utilization was calculated. See pages 72 through 79.

The Access & Infrastructure Committee reviewed projected estimates of parking utilization and determined that unused parking at the periphery of downtown does not address the persistent deficit in the core area, which is limiting building occupancy. The Access & Infrastructure Committee determined that at least 1,000 additional ways to access Downtown Buffalo would be needed to free up existing core parking areas, so that vacant core buildings could become occupied.

The availability and use of transit was documented (pages 87 through 99), as was the availability of bicycle faculties for employees (pages 100 through 104). Downtown Employees were surveyed about how they currently commute to Downtown for work, and their attitudes about different modes of travel. This helped to identify alternative options and incentives that could be considered for encouraging employees to commute without using limited core parking spaces (pages 105 through 128).

The Committee developed goals for 1,000 new ways to access downtown including: creation of new curb parking spaces, management of privately held parking, carpooling, converting parkers to transit, encouraging use of low-cost satellite parking facilities and price adjustments (page 132).

Finally, recent changes in the Downtown parking supply and in projected development projects and office absorption rates were reviewed. Projected Downtown parking supply and utilization was re-calculated. Additional solutions were recommended by the Access & Infrastructure Committee (page 135).

Key Findings

Initial Off-Street Parking Findings:

- There is a surplus of off-street parking in Downtown, but it is not located within walking distance of core employment.
- 59% of off-street parking is available to the general public, but 41% is held for private use by the owner and/or tenants.
- Parking available to the general public is used more intensely than private parking, with two Core districts over capacity and a third only 54 spaces from capacity.
- Privately held parking is less efficiently used, with a greater percentage of unused spaces.
- Privately held parking has been increasing in Downtown and parking available to the general public has been declining. Upcoming changes in ownership of two Buffalo Civic Auto Ramps will further reduce the portion of the parking supply that is available to the general public, and make it more difficult to create an efficient supply of parking that will meet the needs of Downtown business, but not overwhelm other uses.
- One solution to lack of available parking in the core is to find ways to utilize available periphery parking spaces.

Initial On-Street Parking Findings:

- Curb parking regulations and restrictions have generally been in place for ten years. This is a good time for review, and to identify if more spaces can be put to efficient use for short-term parkers who patronize downtown retail, restaurant and service businesses, or can be made available for longer duration parkers who work or live nearby.

- Curb parking availability is limited for the general public, especially short-term spaces. Longer duration parking at short-term meters and increased restricted parking contribute to this limitation.
- The above observation is supported by the Downtown Buffalo 2018 Transportation Mode Survey. 2% of respondents report regularly feeding a short duration meter for all day parking. The 47 respondents represent 752 Downtown employees. This removes 59% of the publicly available short duration downtown parking meters from use. If not occupied by all-day parkers, at least 3,000 short duration patrons would have used those 2 hour metered spaces each day.
- Restricted parking spaces have lower occupancy rates than curb parking available to the public. Perhaps some restricted parking could be freed up for use by the general public. There also is additional informal restricted parking usage with parked cars placing government department signs and restaurant menus on their dashboards, not all of which are authorized.
- Average duration of parked vehicles is over 2 hours, and most spaces are signed for 2 hour parking maximum. Parkers are returning to feed meters and staying for longer durations at short-term meters. Mid-range duration parkers needing 3 to 5 hours of parking seem to be feeding meters regularly. This may be due to increased pricing of off-street short-term parking.
- It may also be time to consider balancing curb-parking rates to make feeding meters less attractive. Most itinerant off-street parking rates result in parkers paying for a day of parking within 2 or 3 hours. If a parker needs 3 to 5 hours of parking, they must pay the full daily rate. Perhaps a possible solution could be tested at a public parking facility by increasing the number of hours of parking to five before charging the maximum daily rate.

Combined Parking Supply Findings:

- While there is a surplus of parking spaces in Downtown as a whole, spaces are not available close enough to demand in current Downtown Core districts, especially the historic Retail Core.
- The Downtown core area, including the historic Retail Core, Government, Main Genesee and Office districts, has 38% of downtown's parking spaces but contains 65% of the demand for parking with more consumer businesses and the 65% of Downtown's employees who work in the core.
- Thousands of core parkers currently walk to periphery parking, especially from the Government District, as documented in the employee survey and calculated demand estimation.
- The Office district contains the core-parking surplus with 838 surplus spaces of the net 808 Downtown Core surplus. At the time of the on and off-street parking surveys in 2016, six of the Office District building were in transition to new uses and were under construction.
- The development projects expected to occur over the next five years, combined with conservative office expansion following the 10-year trend, will put the Downtown Core into a 500-car deficit.
- The Core deficit expands to 630 and 760 if office growth is moderate or more aggressive
- As has been stated repeatedly by downtown employers and developers, tenants and employers must know that there is some available parking nearby before they will commit to sign a lease or move employees Downtown.
- Other access solutions can help, and should be aggressively pursued. GBNRTC and Go Buffalo Niagara are able to work with employers and landlords to identify and implement solutions
- Publicly managed, shared parking is the most efficient parking option. Private restricted facilities are less intensively used. If our goal is to minimize the amount of space dedicated to parking yet to provide sufficient supply to support occupancy of vacant buildings, then publicly managed, shared parking should be the preferred alternative.
- Structured parking is a much more efficient use of Downtown land to supply the parking spaces necessary for vacant buildings to become occupied. 37% of the current Downtown parking spaces are in ramps and garages, but they only take up 4% of the Downtown footprint and 13% of the total parking supply footprint.

- It is time to look at replacing some existing surface parking lots with more efficient structured parking. This will allow the supply of parking to increase while also freeing up new land areas available for development. Developers have noted that the supply of available building stock is diminishing, creating pressure, finally, for conversion of parking lots to development projects. The recent housing report by The Partnership advocates for use of surface parking lots as development sites.
- Green Code/ Unified Development Ordinance requirements for active uses at the street level of structured parking facilities have a positive effect on street life over existing open parking lots.
- There are other city models where a separate company manages surplus private parking spaces for owners, and makes them available to the general public.
- Moderate pricing changes should be considered as an option to promote helpful access behavior changes, e.g. preserving short-term curb-parking for short-duration visits to Downtown; use of low-cost satellite parking facilities for cost sensitive employees; converting parkers to transit; and encouraging carpooling, bicycling and walking. Moderately increased fees may be more acceptable to the public if they are dedicated to a fund that will reduce the cost of less convenient access options, with the purpose of making available priority core parking spaces needed to achieve increased building occupancy.
- Curb parking rate changes should be selected to support high occupancy of curb parking spaces while still leaving some spaces available for short duration parkers to cycle through. Rates that are perceived as too high will result in fewer parked cars, lower revenues and increased demand for expensive and difficult to provide off-street parking. When spaces do not generate enough income to cover meter and maintenance expenses, they should be put to work for downtown by providing free additional parking supply.
- Off-Street parking fee increases should be phased in over time so that employee dissatisfaction does not result in tenants relocating to available suburban space. Increased building vacancy is followed by reduced assessed values and lower property tax generation.

Transit Findings/Recommendations:

- Downtown is served by both Metro Rail and Metro Bus, with 9% of downtown employees reporting that they use transit for commuting.
- Use of Pre-tax flex benefits for purchase of transit passes by employees help make transit more competitive, but the logistics for employees to purchase passes are inconvenient due to IRS regulations and NFTA's use of PayPal for credit card processing. Employees often must go to NFTA's Cash Office at 181 Ellicott Street to purchase passes or the employer must purchase passes for the employee via invoice and company check. This difficulty will be mitigated when NFTA migrates to their new fare collection system.
- The new NFTA fare system will allow purchase and reloading of Metro Passes with pre-tax benefit debit cards eligible under IRS guidelines.
- Efforts to expand the use of pre-tax transit flex benefits should utilize the new fare collection system, rather than attempting to work around current logistics.
- NFTA's Corporate Pass Program, another excellent benefit option for employees, is currently being tested. This program includes a pre-tax purchase of transit passes component and requires a minimum employer contribution of $10 per month, combined with NFTA's volume discount of $10 per month. Transit passes could be reduced from $75 per month to approximately $48, depending on the employee's personal tax rate.
- NFTA is willing to offer the Corporate Pass volume discount to smaller employers if an "umbrella" organization organizes the Metro pass purchases. The BNMC is an excellent model of this in the Medical Campus area. This will be an important goal for downtown to encourage greater utilization

of transit for employee commuting. It will also be a way to offer the Corporate Pass discount to employers offering transit-benefit debit cards, who may be willing to contribute to employee monthly transit costs to match NFTA's discount.

- A goal for growth in use of Metro Perks and pre-tax transit benefits for Downtown Buffalo might be 1 % of downtown employees. This is based on the experience of a Downtown employer with offices in other regions where transit is more easily purchased with pre-tax income. The number of downtown employees has been calculated to be 55,362. One percent would be 553 people.

Bicycle Commute Findings

- 1% of Downtown employees report bicycle use as their primary mode of transportation for the commute between work and home. This equates to 515 downtown employees.
- When specifically asked how often they bicycle to work, 2% of employee survey respondents report daily and 2% report often. This equates to 2,000 committed bicycle commuters.
- 64% of employee respondents report owning a bicycle and 12% report that they have ridden to work at least once, establishing a pool of 4,464 potential bicycle riders.
- Based on the survey results, we can assume that 500 to 2,000 downtown employees are regular bicycle riders and that they need secure bicycle parking to avoid theft. Many may have access to indoor parking, but there is also a need for publicly provided, secure bicycle parking for committed riders.
- Plans to support growth of bicycle use are in place and should be supported. The *2016 Buffalo Bike Master Plan Update* identifies catalyst projects to be built over the next decade Downtown, to encourage additional bicycle use by less adventurous riders. These include: improvement of the Broadway Five-Point intersection at William and Ellicott to Michigan; and marked lane or cycle tracks on Church and Division between S. Elmwood and Michigan.
- The City of Buffalo plans additional separated bike lanes on S. Elmwood and Lower Terrace.
- Use of ReddyBike at large satellite parking lots was identified as another incentive to move parkers from core parking locations so they may "park and bike" to core work locations.
- Secure bicycle parking near bike-commuter employment areas to prevent theft is identified as an unmet need that would encourage more use of bicycle travel for commuting. Secure bicycle parking may be provided as an enclosed space, a lock-up cage, or as individual lockers. Individual lockers must have a transparent component so they will not become used for unrelated storage.

Downtown Buffalo 2018 Transportation Mode Survey Findings

- The number of people commuting to work by car has increased in the last 20 years and the number of people using public transit had declined. Survey responses indicated that 82% of Downtown employees are driving alone and 5% are carpooling.
- 2% of respondents, or between 752 to 886 1,100, employees, indicated that they are parking at 2-hour meters and paying the meter throughout the workday, leading to 59% to 69% of the short-term parking meters being used by employees and not available to short-term parkers and downtown visitors.
- Approximately 16% of respondents indicate that they have trouble finding parking. This equates to between 7,344 to 8,858 employees who are having trouble finding all day parking in Downtown.
- Many people are currently walking a distance to find parking. Approximately 19% of respondents, which represents 8,300 to 10,518 employees, are walking further than a 5-minute walk for parking. This corresponds to the parking demand conclusion generated from calculated land use that thousands of core area employees, particularly in the Government District, are already walking to periphery parking.

- Approximately 15,120 people who do not currently carpool indicated that they would be interested in carpooling if they knew someone to carpool with, had assistance finding a carpooling partner, had priority parking for carpoolers, or other incentives.
- About 10,032 employees ride transit from time to time, as opposed to daily or never. They are a potential target group for conversion to become daily transit riders.
- Employees who are given subsidies for parking are more likely to drive alone. Employees who are given subsidies for transit are more likely to use transit.

Parking as a Land Use Findings

- The volume of parking as a proportion of Downtown has been discussed at length with estimates as high as 50% of Downtown's land area being erroneously noted as parking in local media. The 2017 Land Use inventory, updated in 2018, found 10,374,942 square feet of parking of all types including ramps, lots, private and publicly available. Parking is 26% of the 39.6 million square feet of land and buildings in Downtown Buffalo. These parking areas cover 33% of the 19.7 million square foot surface footprint of Downtown.
- Consolidation of parking lots into efficient structured parking has been discussed as a goal since the *Queen City Hub Plan* for Downtown Buffalo was released in 2004. Ramps and garages make up 46% of Downtown's parking square footage, but take up only 4 % of the Downtown footprint and 13% of the total parking footprint. Parking lots make up 54% of parking square footage and 28% of the Downtown footprint.

2018 Update of 2016-2017 Analysis

Since the parking analysis work completed in 2017, several changes have occurred:

- In 2018, the Court/Franklin lot at 50 Court Street was converted from publicly available to private use for the Public Safety Campus. Occupancy of the Police and Fire Headquarters at the Michael J. Dillon Federal Court House brought new employees into the core. The use of the building was anticipated in our future development scenario; however, the employee only use of the parking lot was not included. This results in a loss of 65 parking publicly available spaces in the Core.
- The conversion of the One Seneca Ramp and Main Place Mall Ramp from public to private ownership will be occurring over the next year. Additional demand at the One Seneca Ramp was already included in our future development scenario with the development project occurring there. While the future operation of the ramp at Main Place is unknown, it is likely that more spaces will be dedicated to private use to provide for occupancy of upper floors at Main Place and the attached Liberty Building. Based on our estimates and the estimated parking demand factors to fill this space with tenants new to downtown, 389 spaces of the current parking supply at Main Place Ramp would no longer be publicly available within the Downtown Core.
- The expected development at 201 Ellicott Street (currently the Ellicott-Oak Lot) has progressed and the lot is expected to close in the spring of 2019 for brownfield remediation. As currently proposed, only fourteen parking spaces are to be included in the development. The result is a loss of 375 spaces within the Downtown Core not included in development forecasts, at the same time that the project adds demand for additional parking in the area from residential and other uses.

Projects in the future demand scenario seem to be on track as predicted, including:

1. Public Safety Campus – former Dillon Courthouse – opened summer 2018
2. Market Arcade Movie Theater – opened summer 2018
3. St Paul's Parish Commons Apartments – opened Spring 2018
4. 500 Pearl Street – to open winter 2018-2019

5. The Marin – former Marine Trust and Roblin Buildings – under construction
6. Explore and More Museum - Under Construction
7. Labatt's Warehouse – former High Temp Fabrication building –Restaurant opened Fall 2018
8. Seneca One – Under construction
9. The Antonio Retail Space Buildout – Theatre opened Oct 2018, retail space built
10. Alexandre Apartments – opened spring 2018
11. 523 Main Street – Restaurant space opened summer 2018
12. New Development Parcels at Canalside – Proposal Selected
13. Wyndham Hotel/restaurant – former AM&As – Construction underway

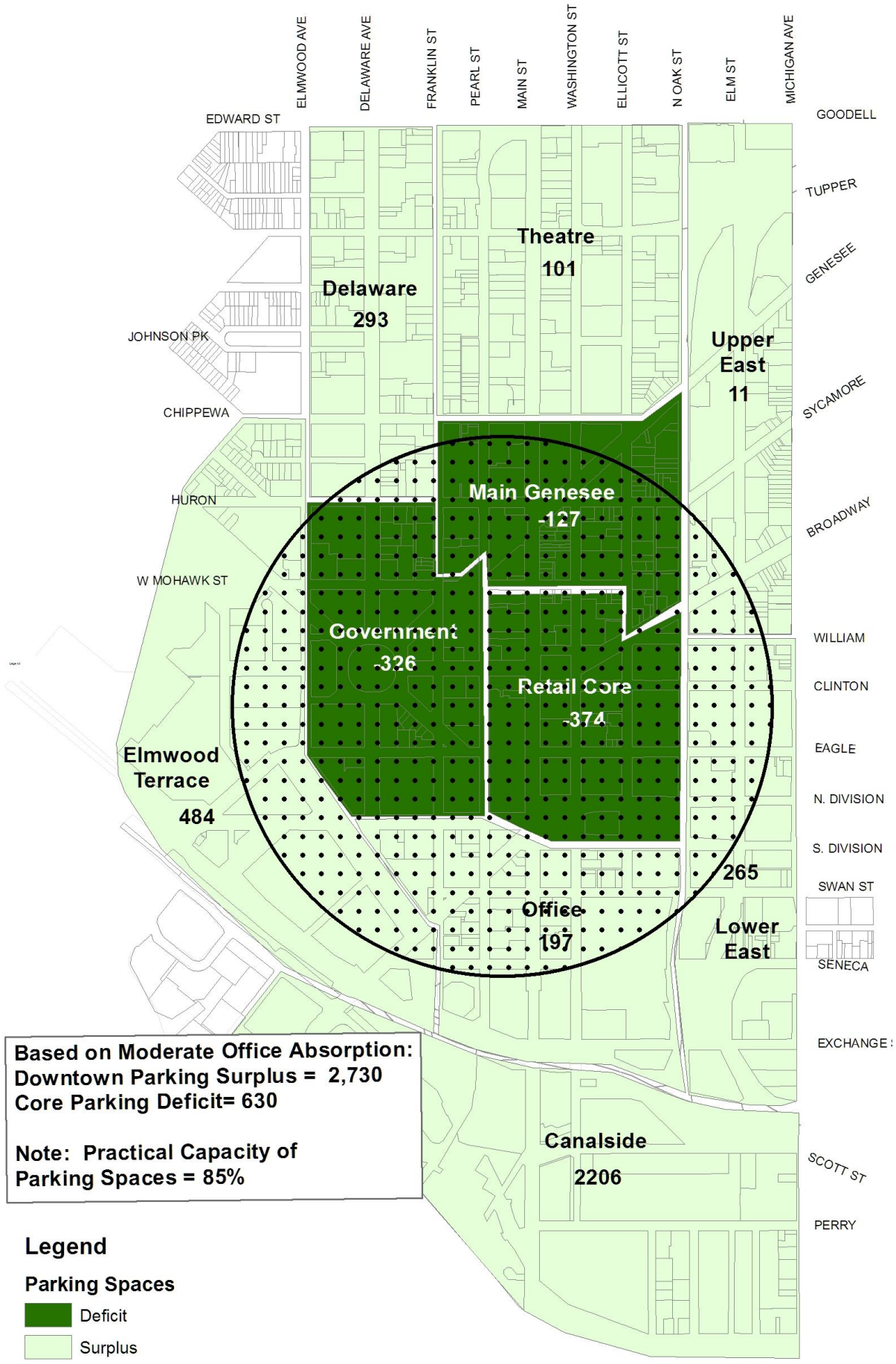
In total, a loss of an additional 829 spaces is expected within the Downtown Core because of these changes. When applied to the Moderate (2%) Office Absorption numbers previously calculated, the parking surplus for Downtown as a whole would drop from 2,730 to 1,901 spaces. The Core parking deficit would increase from 630 spaces to 1,459 spaces. While not yet included in these calculations, based on the preliminary design discussions, an additional 60 parking spaces will be needed in the historical Retail Core, during the workday, to provide parking for the residential units planned for 201 Ellicott Street. The 150 spaces needed by those residents in the off-peak evening and weekend hours are not considered in this analysis.

The following *Table: Updated 2018 Parking Surplus/Deficit* illustrates these changes.

District	**Surplus/Deficit Moderate Used in Study**	**Surplus/Deficit Moderate with 2018 Changes**
Delaware	293	293
Theatre	101	101
Upper East	11	11
Main Genesee	-127	-127
Elmwood/Terrace	484	484
Government	-326	-391
Retail Core	-374	-1138
Lower East	265	265
Office	197	197
Canalside	2206	2206
Total Surplus/Deficit	**2730**	**1901**
Core Surplus/Deficit	**-630**	**-1459**

The following maps illustrate the *Surplus/Deficit with Calculated Future Development and Moderate (2%) Office Absorption.* The 2016 map illustrates *Surplus/Deficit by District* and 2018 is displayed by *District and by Block* so the problem areas can be more easily identified.

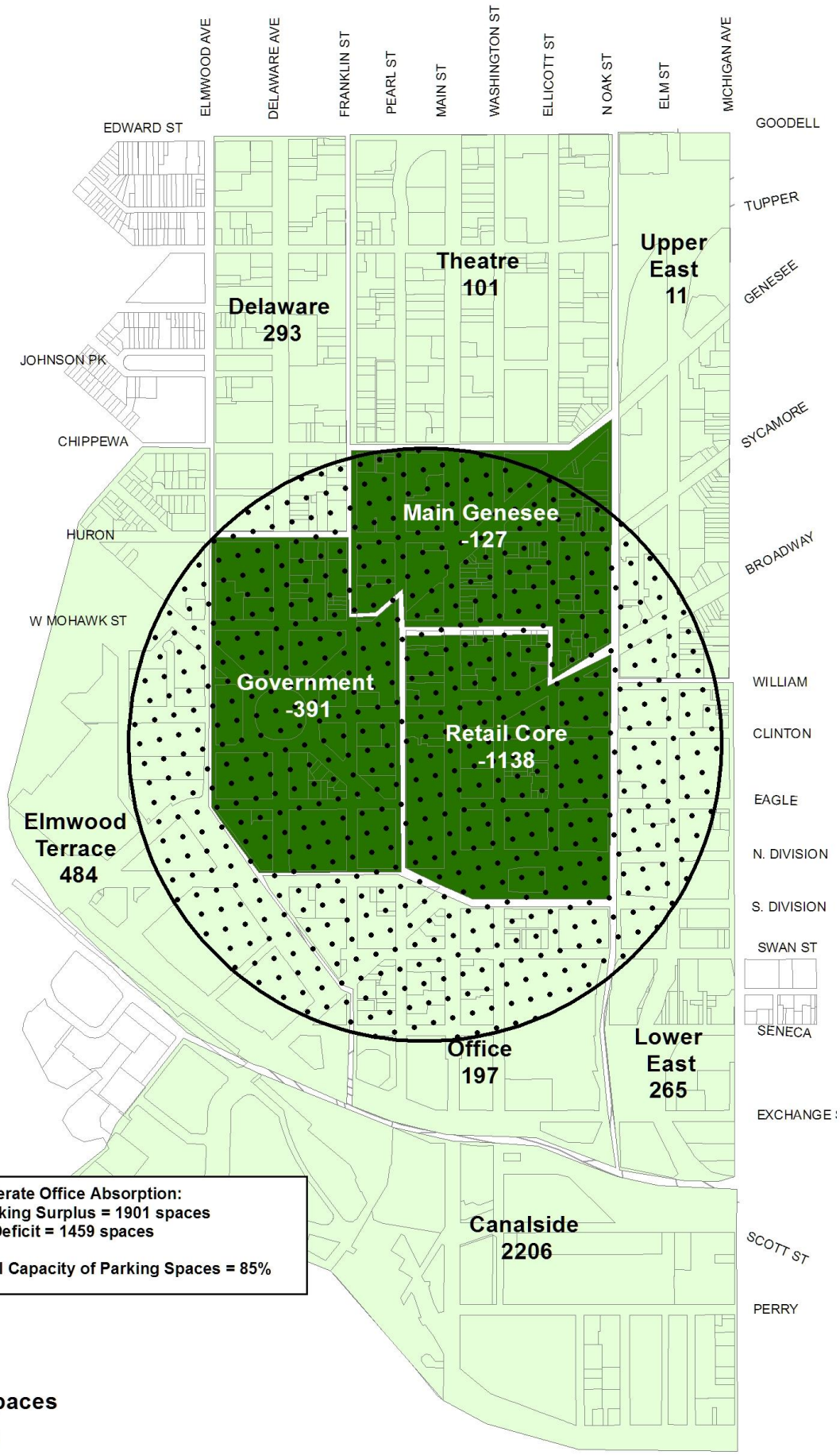
2016 Surplus/Deficit per District with Calculated Future Development and Moderate (2%) Office Absorption



June 6, 2017

AK-DC

2018 Updated Surplus/Deficit per District with Calculated Future Development, Moderate Office Absorption and New Changes



Based on Moderate Office Absorption:
Downtown Parking Surplus = 1901 spaces
Core Parking Deficit = 1459 spaces

Note: Practical Capacity of Parking Spaces = 85%

Legend

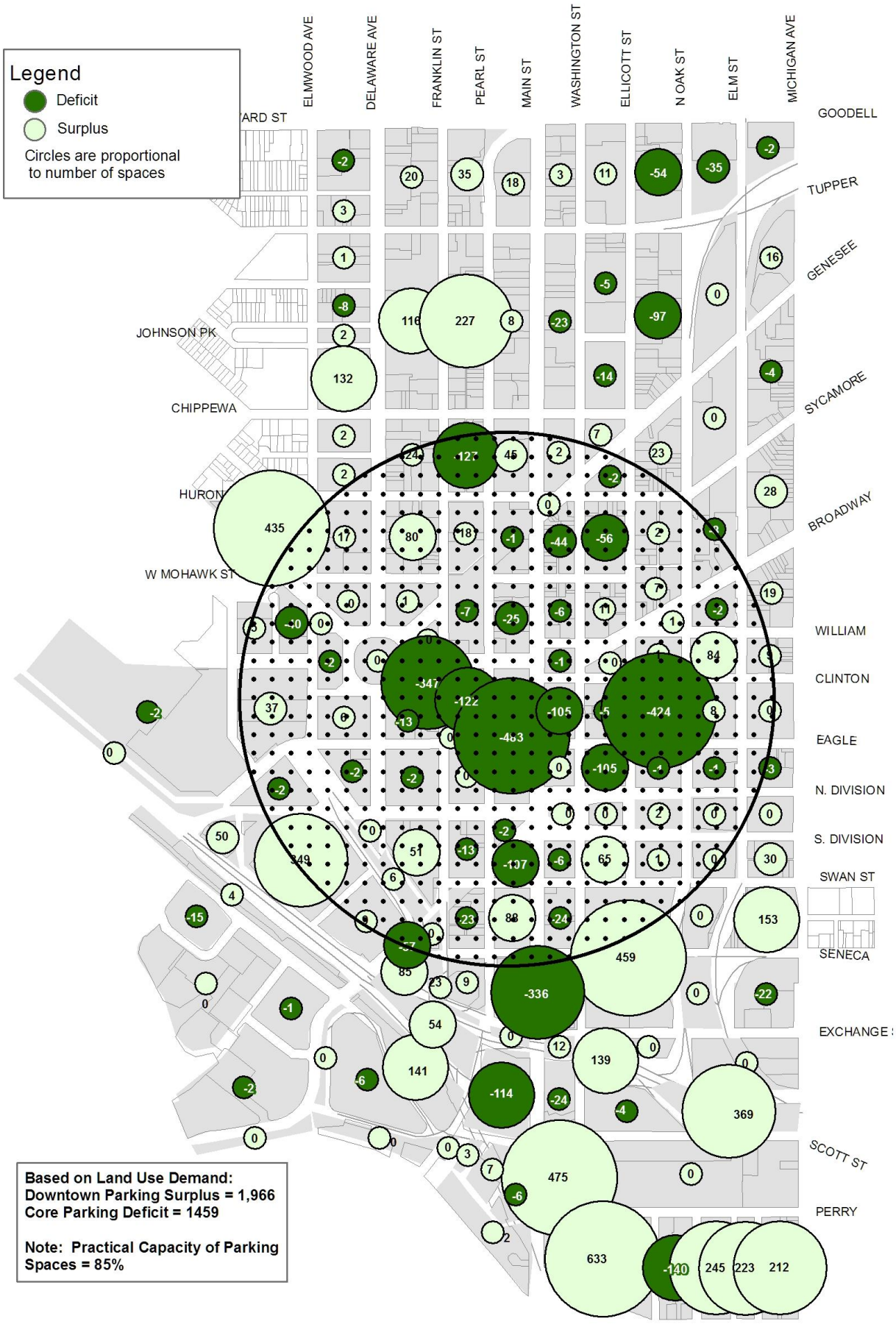
Parking Spaces

- Deficit
- Surplus

October 16, 2018

AK-DC

2018 Updated Surplus/Deficit per Block with Calculated Future Development, Moderate Office Absorption and New Changes



October 31, 2018

AK-DC

Recommendations

Identify 1,000+ New Ways to Access Downtown Buffalo.

The Access & Infrastructure Committee of Buffalo Place Inc. conducted a two-year study of Downtown Access with the goal of supporting occupancy, activity and health. The major study conclusion is that at least 1,000 additional ways to access downtown Buffalo will be necessary to facilitate expected development projects and to secure occupancy of vacant buildings.

Specific Recommendations for 1,000 New Ways to Access Downtown:

	Recommendation Summary	**1,000 New Ways to Access Downtown**
1	Create New Curb Parking Spaces	200
2	Convert Parkers to Transit	200
3	Use Price to Move Core Parkers to Satellite Parking Facilities	200
4	Offer Joint Management of Surplus Private Parking Spaces	100
5	Offer a BCAR Carpool Incentive Program for a Net Loss of Monthly Parkers	50
6	Use Price to Encourage Periphery Parking. Dedicate Moderately Increased Fees to support the Access Program of Non-traditional Transportation/ Parking Choices	250

Recommendation Details

1. Create 200 new curb parking spaces
    A. Staff identified some 300 potential spaces to be considered for additional parking. City of Buffalo Public Works and Parking Departments are reviewing the list to identify which spaces can be put in place and which may not be feasible. Details are in Appendix M.
        - 288 proposed spaces are under review,
        - 14 have been approved,
        - 10 were found not possible by City Public Works.
2. Convert 200 Parkers to Transit. Specific program ideas include:
    A. Offer a Free Try Out Transit Program to Downtown Employees who may not have experience riding Metro Bus or Rail.

    A limited version of this program was identified as eligible for funding under CMAQ and was included in a recent grant application by NFTA with GBNRTC. A reduced price metro pass ($35, a $40 deduction) in the month of May for participants who register for Air Quality Action Day updates in the Clean Air NY program. If this application is awarded, funding would be available for 500 participants to test lower cost transit during the three-year grant program.

    B. Market Try-Out Transit to BCAR parkers, for a two-month duration, offering no-risk return into the BCAR system. A similar program was effective in the late 1990s.

    A specific program for BCAR parkers would not be eligible for CMAQ funding as it targets a specific group. The month of May reduced price program described above can be marketed to BCAR monthly parkers along with the general population, and BCAR could allow any

participants a no-risk trial, if desired. This idea can be pursued if the CMAQ grant is awarded.

C. Encourage companies to offer pre-tax flex transit benefits to employees – Metro Perks program
   - Employees can save 10 – 37% of transit pass fees, depending on their personal tax rate. Most would save 22% or less, see page 98. Employers also save FICA on the tax savings.
   - The best timing for this option is after NFTA launches their new fare system, as logistics for purchase of Pre-Tax Metro passes are currently complicated.

D. Expand Corporate Pass Program ($10 volume discount to employees from NFTA if matched by an equal or greater contribution by the employer.)
   - Employee transit passes would be reduced to $55 per month before additional pre-tax savings are subtracted. Most employees would purchase passes for $43 to $50 per month, depending on their personal tax rate.
   - Market to large employers (NFTA requires 25+ participants per company to obtain the volume discount)
   - Find an umbrella organization to package and offer discounts to smaller companies as the BNMC is doing for the medical campus
   - Cover umbrella organization out of pocket expenses as part of overall access support program

3. Encourage 200 cost sensitive parkers to relocate from BCAR core spaces to underutilized periphery parking spaces by providing a group discount.
   - Requires funding to reduce parking fees sufficiently. The program offered by M&T Bank has attracted users at a rate of $19/month for KeyBank Arena ramp parking and $29/month for HarborCenter Ramp Parking, both less than posted monthly rates.
   - BCAR has allocated some funds to support satellite parking for 2018-9. Additional funding from the overall Access Program will be needed to reach the 200-car goal.
   - The future DL&W Metro Rail Station was thought to be a permanent solution for this option, but needs review now that a design concept is available. Current station access is oriented towards the foot of Main Street. This access path may be too far from the parking supply at Illinois (KeyBank Arena Ramp), Mississippi, Baltimore and Columbia Streets to attract users.
4. Open an additional 100 publicly available off-street parking spaces by offering joint management and marketing of surplus, privately held parking, currently reserved for use by the owner or tenants.
   - Attempt to make matches with a private parking operator to manage
   - If not adopted by a private owner, this would require an organization to operate with administrative expenses to be covered by the overall Access Program.
5. Create a Car Pool incentive program at BCAR facilities; offer the same program to private operators. Attract net loss of 50 cars.
   - A similar program offered by GoBNMC has been successful.
   - Incentives will be needed to make this system feasible, such as preferred parking locations near the exit, and a reduced parking fee from sharing one monthly parking rate, etc.
   - Will need to find ways to connect Carpoolers to those who live near them. There is a state website, but assistance through the parking operator will increase user friendliness.

- Funds to support this program in BCAR ramps were included in GBNRTC's application under NFTA for CMAQ funding including signage and advertising for carpooling of five spaces at five BCAR ramps (Augspurger, Mohawk, Main Place, Fernbach and Turner), for a total of 25 priority carpool parking spaces. An option to expand is available if there is demand for more carpool spaces.
- The Downtown Employee Transportation Mode Survey indicates interest by some 15,120 downtown employees in carpooling if provided assistance in finding carpool partners, or were offered incentives such as priority parking locations.

6. Use moderately higher prices at BCAR facilities to increase the differential cost and encourage use of less expensive parking in the periphery, freeing up 250 core spaces. Reserve new revenue to support the Downtown Access Program. Specifically:
    - Revenue to support lower cost periphery parking program – an outside contribution is required to price satellite parking at a low enough rate to be attractive to price sensitive parkers – M&T satellite parking pricing example.
    - Support Try –out Transit initiatives that are linked to BCAR monthly parkers
    - Provide Secure Bicycle parking options for frequent bike commuters – secure lock up rooms or lockers

The following Additional Recommendations are made due to the 2018 projected increase in the core parking deficit:

1. Insure adequate short-term curb parking by: Considering enforcement techniques and balancing pricing for long and short duration curb parking to lessen incentives for illegally feeding meters. If curb rates are to be moderately increased, dedicate increased revenues to an overall downtown Access Program to encourage alternative transportation choices including Try Out Transit and Low-Cost Satellite parking. Consider if all-day meter rates adequately cover meter collection and maintenance expenses.
2. Construction of structured parking to replace smaller facilities or inefficient lot parking in key demand areas. Prepare for losses in publicly available parking expected when the Court Franklin lot is dedicated to City employees, and Main Place and Seneca One Towers ramps revert to private owners, and become dedicated to those facilities.
    A. Preferred sites where new structured parking will support increased occupancy of vacant buildings:
        - 201 Ellicott
        - Mohawk Ramp Area
        - Court Street
    B. Interest in consideration/ study of building structured parking ramp spaces to support building occupancy and to free up low density parking lots for building development has been mentioned by:
        - BCAR – Concern regarding the prospective loss of 1,532 spaces in the publicly available system when Main Place and Seneca One Tower Ramps revert to the building owners and Court Franklin lot goes out of public service.
        - Ciminelli Development Planning group – The 210 Ellicott project motivates review of the downtown parking supply.
        - The Partnership's recent housing study supports use of current parking lots as development sites, and consolidating parking into fewer, more densely populated parking structures.
        - *Queen City Hub Strategic Plan for Downtown Buffalo* supports development of structured parking facilities to allow for development of surface parking lots.

C. Funding for ramp construction is an issue, especially since parking reserve funds have been allocated to the City General Fund. Some work is underway by BCAR to identify if private tax incentives may have a role.

3. Create an Access Program Fund to support less traditional transportation/ parking choices. Dedicate increased revenues from increased curb and BCAR public parking rates to these programs. (Builds on recommendation #6. Assumes management of a more comprehensive downtown access system.)
    A. Management/marketing and subsidy of periphery parking
    B. Try Out Transit pass program
    C. Convert BCAR parkers to transit with no-risk test passes
    D. Reduction of Carpool pass fee as an additional incentive to encourage carpooling at BCAR facilities.
    E. Umbrella agency for small businesses to participate in NFTA's corporate transit pass program
    F. Management of surplus, privately held off-street parking
    G. Provision of secure public bicycle storage in secure room/lock-ups or lockers to prevent bike theft for frequent riders.
4. Create a Shuttle system to encourage park and ride between the Canalside area at the south of Downtown, near KeyBank Arena, and Main Street corridor employment. Currently employees who park in the KeyBank Center and HarborCenter ramps use Metro Rail to travel to their workplace in the Downtown Core. A shuttle program would offer an additional higher level of customer service similar to the Park'n go Shuttle of the early 2000s. This and a low parking fee will motivate more employees to overcome the inconvenience and extra time required to use a satellite parking facility.

Introduction

Downtown building owners, managers, and employers report difficulty securing tenants, and housing employees due to an inability to identify available parking. Buffalo Place Inc. responded to this concern and kicked-off a focused review of downtown access in May of 2016. A committee of interested downtown stakeholders was formed, including property owners and managers, leasing agents, realtors, employers, parking, access and infrastructure providers including the City of Buffalo, Erie County, NFTA, NYS DOT, Thruway Authority, GBNRTC, Go Buffalo Niagara, BNMC, and private and not for profit parking operators.

The primary goal of this Downtown Access Study is to support increased occupancy, utilization and vitality of Downtown Buffalo. As determined by the land use inventory in this study, there are currently 5.7 Million square feet of vacant building space Downtown, more than 20% of building space. Of the vacant building square footage, 1.7 million is vacant Class A and B office space. Sufficient access is critical to fill these spaces.

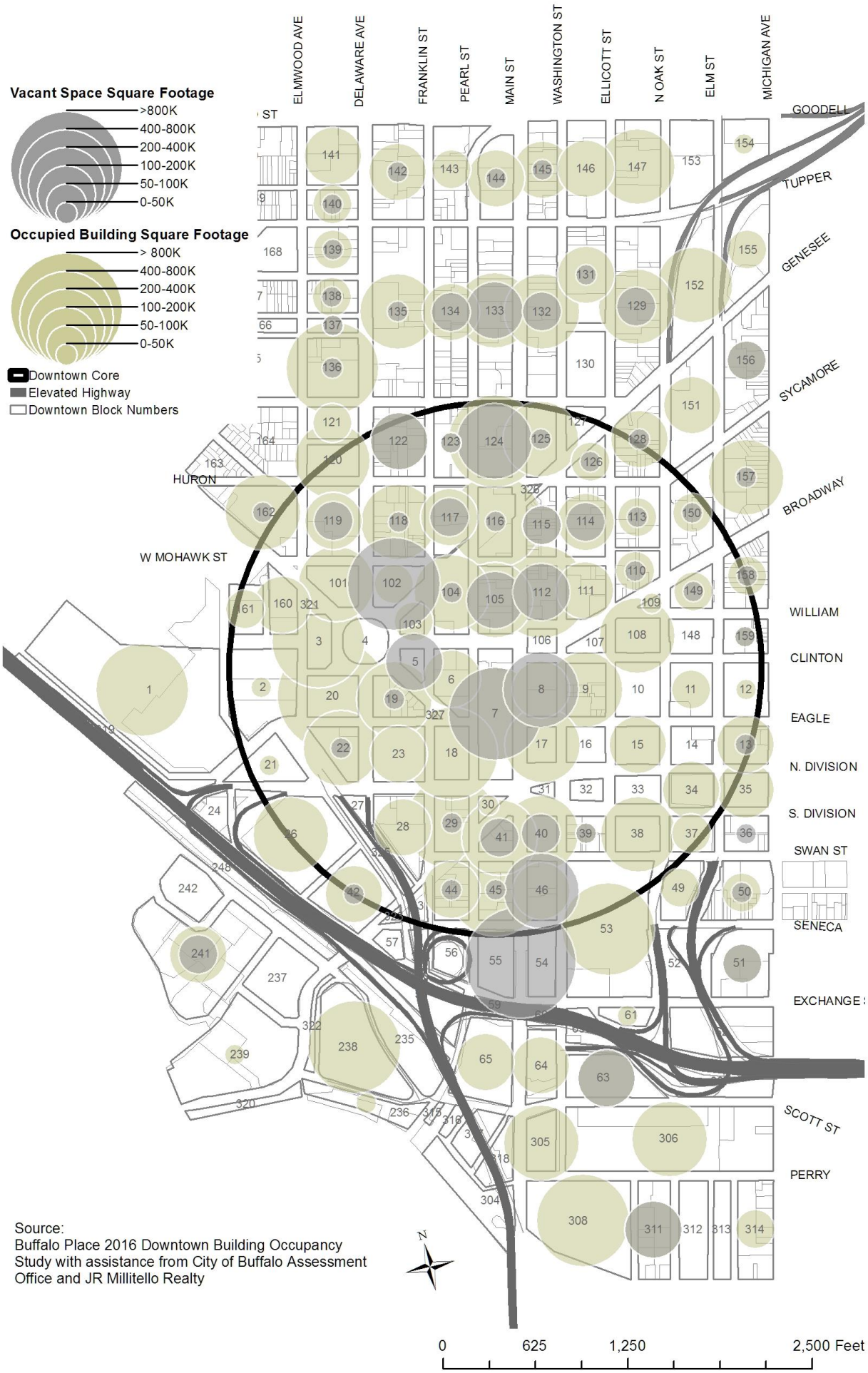
While building managers and realtors emphasized that lack of sufficient parking is an impediment to increasing activity in Downtown Buffalo, other partners encouraged greater utilization of alternate means of access including transit, bicycle travel, and shared automobile use. Using the 2000 Access and Infrastructure Task Group effort, *Destination Downtown Buffalo 2002,* as a model, the committee performed an in-depth dive into downtown access, capturing data on current and potential future demand, as well as access options and current utilization rates. The committee has been guided by the principles of smart design, the access recommendations of the *Queen City Hub Strategic Plan for Downtown Buffalo*, and the Buffalo Green Code.

The Access & Infrastructure Committee developed a list of concerns, desired outcomes and identified the information required to develop effective conclusions (Appendix A1 and A2). Staff proceeded to collect information and to present policy questions to the committee for discussion, evaluation and guidance.

The following map illustrates 2017 Downtown vacant and underutilized space per block in gray, identifying the major properties that motivate this Access initiative. The committee, with a goal of putting fallow space in downtown to work for the community, sought ways to improve downtown access, particularly in blocks where access was seen as a problem for putting to work nearby vacant space or for developing underutilized parcels.

The *Destination Downtown Buffalo 2002* report successfully accomplished its goals. The re-pricing of curb parking, creation of 532 curb spaces, and public investment in the expansion of two parking ramps (+1,400 spaces) set the stage for the last decade of downtown growth, including a 3.86 million increase in building square footage, and a 787,513 SF increase in occupied office space. The access improvements that were brought about by that study have now been fully absorbed. Additional capacity is required to facilitate another round of downtown private sector investment.

Building Occupancy and Vacancy



Source:
Buffalo Place 2016 Downtown Building Occupancy Study with assistance from City of Buffalo Assessment Office and JR Millitello Realty

Access & Infrastructure Committee Problem and Goal Statement

Problem Statement:

There is increased interest in downtown development, as a place to live, work and play. Access to and around downtown is essential to realize this new potential. Property owners, developers and realtors report difficulty securing tenant commitments without being able to identify parking and access solutions for potential users.

While there is acknowledged increased interest in downtown, there is also concern that without available access solutions, investment will occur elsewhere in the region instead of downtown.

Guiding principles:

Maximize downtown's potential as the center of our region, especially for employment, entertainment and civic services.

Additionally:

- Support building occupancy including active storefronts and occupied upper floors
- Support growth of downtown as a place to live
- Support density of the Central Business District
- Support downtown quality of life for employees, residents and visitors.
- Allow everyone to drive and park, ride the bus or train, bike or walk to take advantage of everything downtown has to offer

Quantify Baseline:

- Parking Supply and Utilization
- Bus and LRRT Level of Service
- Building Utilization and Occupancy
- Mode share for downtown travel

Goals:

- 85% Occupancy of Class A and B office space (consistent with earlier study goals)
- Parking space can be found by users = Less than 85% occupancy of parking facilities within downtown usage districts
- Increase percentage of travel to and from downtown via transit
- Increase percentage of travel to and from downtown via alternative transportation modes including: walking, biking, car-pooling, ride sharing
- Increase percentage of storefronts occupied with active uses

Projection of future building occupancy and development trends:

- Expected Development Projects
- Expected building occupancy and impact on downtown activity

Specific Performance Measures:

Identify specific performance goals based on the current downtown situation and the expected changes forecast to occur over the next five years.

Access Study Parameters

Peak Hour Study Period

The Access study investigates Downtown during the Monday to Friday, daytime workweek. This is the peak time for downtown use of the parking supply and transit services. Downtown evening and entertainment uses on weekends are increasing, but do not approach the capacity issues of the workweek. In addition, we did not have sufficient resources to document parking utilization overnight and on weekends.

Downtown Population –

Estimate of Downtown Buffalo CBD Employment – 2018

Downtown employee estimates vary between 34,639 to 67,156. This wide range was considered a problem and review uncovered problems with the sources. See Appendix B for additional information. Buffalo Place found that we had collected sufficient survey information to make a reasonable estimate of downtown employment. The table below illustrates the process resulting in a downtown employee estimate of 55,362. Of these downtown employees, 46,135 work during the weekday peak-hour study period.

The study area is South Elmwood / Terrace/ Skyway on the west, Edward/Goodell on the north, Michigan on the east, and the river on the south. See map on page 19.

Factor	Amount	Units
Buffalo Place Inc. 2016 Parking Study –parked cars in off street lots and at curb parking spaces. These vehicles were parked by downtown employees, residents and visitors	37,757	Parked Cars
Remove cars of Downtown Residents who work in the CBD but travel to work without using their car (they are counted in other travel modes) • 1,184 downtown employed downtown residents (=74 survey respondents X 16) • 83% Own a car (per 2016 US Census ACS) • 69% Do not drive to work (per survey)	-678	Parked Cars
Remove cars of downtown residents who do not work • 1,691 downtown residents x 30% not in workforce • 83% own a car	-421	Parked Cars
Remove cars of downtown hotel guests • 2,129 downtown hotel rooms per 2018 City and Buffalo Place • 86% average hotel occupancy in the City of Buffalo (smallest geography available) VBN • Downtown Hotels report that 20% of guests require parking (Buffalo Place phone survey)	-366	Parked Cars
Remove cars of downtown visitors parked at the curb • 6,792 curb parkers (Buffalo Place 2016 On-Street Parking) • 5,521 park for three hours or less (81% of all curb parkers) • There were 3,287 curbside spaces counted, 81% of them can be assumed to be used by a short-term visitor	-2672	Parked Cars

Remove Short Duration Off-Street Parkers who are likely visitors • 10-15% of BCAR Parkers park for 3 hours or less; use 12.5% • 9,371 off street parked cars in facilities offering short duration parking, less hotel parking	-1171	Parked Cars
Add 20% to remaining observed employee cars for employee vehicles not present on a daily basis - national standard of 20% overage sold for monthly parking passes in employee areas.	6,490	Parked Cars
Subtotal Cars Parked by Downtown Employees	38,938	Parked Cars
Determine number of employees represented by parked cars: • 82% of Downtown Employee respondents drive alone = 1 person/car • 5% of Downtown Employee respondents carpool with an average of 2.08 people/car. 2.4% of employees drive the carpool; 2.6% are passengers • 84.4% Employees (82% +2.4%) drove 100% of the parked cars. Parked Cars = Employee drivers	38,938	Employees Drivers
Add Carpool passengers (2.6% of Employees)	1,200	Carpool Passengers
Add Metro Bus Riders (5% of Employees)	2,307	Transit Users
Add Metro Rail riders (4% of Employees)	1,845	Transit Users
Add Pedestrians (2% of Employees)	923	Pedestrians
Add Bicyclists (1% of Employees)	461	Bicyclists
Add Park & Ride (.4% of Employees)	185	Park and Ride users
Add Other (.3% of Employees)	138	Other Employees
Add Ride Share (6 respondents, .2% of Employees)	92	Ride Share Patrons
Add Work from Downtown Home (.1% of Employees)	46	Work at Home
Subtotal: 100% of daytime weekday downtown employees	**46,135**	**Total Employees during daytime survey hours**
Add Off Peak Employees who work over night or evenings and weekends (Cleaners, restaurant, bar, entertainment) John Slenker, of the New York State Department of Labor cited a Bureau of Labor Statistics study in 2004 that 17.7% of employees work off peak hours. Since this percentage has increased, he recommends adding 20% to cover the number of off peak employees	9,227	Off Peak Hour Employees
Total Downtown Employment	**55,362**	**Total Downtown Employees**

Estimate of Downtown Buffalo CBD Residents – 2018

Based upon the 2012-2016 American Community Survey Five-Year Estimates, BUDC reported occupancy trends, and Buffalo Place's collected housing unit data, Buffalo Place estimates the population within the Central Business District (between Goodell/Edward Streets, Elmwood Avenue, the Michigan Avenue and Elmwood Avenue) to be 2,061 .

The CBD south of Tupper Street is within census tract 165. The ten CBD blocks between Tupper and Edward/ Goodell are in seven different census blocks. Buffalo Place used internal housing unit survey information and occupancy rates reported by BUDC, The Partnership and Buffalo Place for the population estimate, as well as the American Community Survey for CBD blocks north of Tupper Street.

The US Census American Community Survey underestimates both housing units and occupancy, reporting a CBD population in housing units of 1,277. Review of their detail confirmed several missing residential buildings, likely due to recent population changes and the small size and population of the study area. They also report only 75% of housing units are occupied in tract 165, but BUDC, The Partnership and Buffalo Place phone survey information indicates higher occupancy, up to 97%.

In addition to the CBD population living in households, the US Census American Community Survey also lists an additional 599 individuals living in group quarters at the Erie County Holding Center, 190 living at the City Mission and 30 at Harbor House. Immediately adjacent to the CBD is Census Tract 72.02, which includes the Marine Drive Apartments and Waterfront Village, with an additional 1,847 residents in housing units.

See Appendix D for details.

Estimate of Downtown Buffalo CBD Visitors – 2018

As this study deals with average daytime workweek population, visitor count does not include those coming for evening or weekend special events, sporting events, conferences, etc. Visitors counted here are those coming to Downtown for sightseeing, a meeting, a visit to a government office, restaurant or retailer. Many of the people who may be completing these tasks Downtown are already Downtown employees, and are not counted in our visitor count, so people are not counted twice. To find the number of Downtown visitors, Buffalo Place used the number of short-term parkers, both at the curb and in lots/ramps, the number of hotel guest based on number of rooms and hotel occupancy rates, and an approximate number of people who may be coming via Metro bus or rail. Buffalo Place estimates that approximately 4,230 people visit downtown each day.

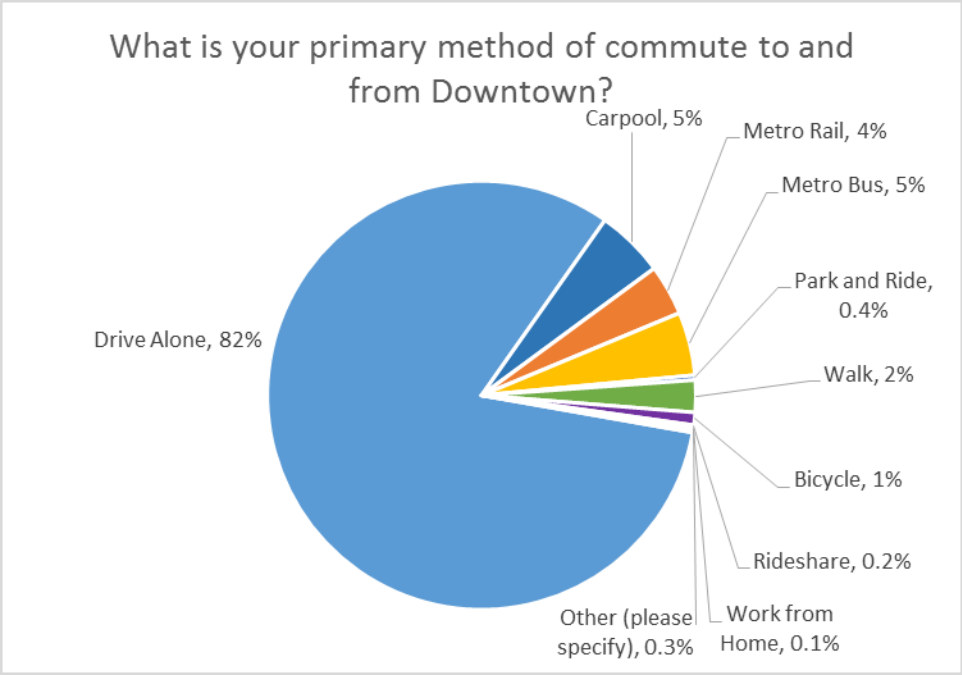
See Appendix E for details

Mode Split for Journey to Work

The following table shows how employees travel to downtown based on the Downtown Buffalo 2018 Transportation Mode Survey.

Table: Employee Method of Commute to and from Downtown

	Bicycle	Public Transportation	Private Vehicle	Walk	Worked at Home
# of Employees	515	4,871	47,365	1,313	50
Percent	1%	9.4%	87%	2%	0.1%



Change in Employee Travel Over Time

Chart: Change in Employee Travel

	1998 Buffalo Place Inc. Employee Survey	2016 Census* (2014)	2017 M&T Employee Survey	Downtown Buffalo 2018 Transportation Mode Survey
Metro/Bus	19%	12%	9.2%	9.4%
Walk Bike Taxi	1%	2%	4.7%	3.6
Personal Vehicle	80%	86%	86.8%	87%

* Review of employee locations illustrates concern about this data source. For example, fewer employees were reported in the Fountain Plaza area than the manager of 40-50 Fountain Plaza reported were in one of three buildings. See Appendix B for additional information on previous employee count sources.

When compared to 1998 information, it appears that more people are traveling to Downtown via personal vehicle, an increase of between 6 and 7%, which equates to approximately 3,070-3,577 more cars needing places to park Downtown. Fewer people seem to be taking public transit. More people appear to be walking and biking to work, likely a result of the emergence of Downtown residential housing.

Buffalo Place Inc. tracks the number of existing Downtown residential units and those proposed in new development projects. Since 2000, there have been 947 new residential units built in the CBD, bringing Downtown to 2,284 units. The rise of Downtown residential can be seen through the increase in the number of people walking to work in the mode split data. Based on survey responses, there are currently 1% of Downtown employees walking to work, which equates to 553 people walking, approximately one walker for every four residential units. Based on new development projects expected to occur within the next five years, there are 1,160 new residential units proposed. If the current ratio of walkers stands, this could result in approximately 290 more people walking to work.

While, rideshare options like Uber and Lyft were made available in Buffalo in summer of 2017, they do not seem to be widely utilized by Downtown employees as a way to get to work. Only 0.2% of survey respondents, equating to approximately 111 employees, currently commute by rideshare. Rideshare is important for entertainment trips and could have an important role in being the vehicle for guaranteed ride home programs to encourage employees to utilize non-traditional commutes via carpool, transit or other alternatives.

Parking Study

Study Area:

The study area is the downtown Buffalo Central Business District (CBD) including adjacent areas used for parking by CBD patrons. Boundaries include Goodell Street to the north, Michigan Street to the east, the Buffalo River to the South, and generally Elmwood Avenue to the west. Several mixed-use properties west of Elmwood Avenue are included because they function as part of the CBD parking supply. The study area is divided into 10 districts:

- Delaware,
- Theatre,
- Upper East,
- Main Genesee,
- Elmwood Terrace,
- Government,
- the historic Retail Core,
- Office,
- Lower East and
- Canalside.

The Downtown Core, shown as a black circle on the maps, generally consists of the Government, Main-Genesee, (historic) Retail Core, and Office districts.

Parking Supply:

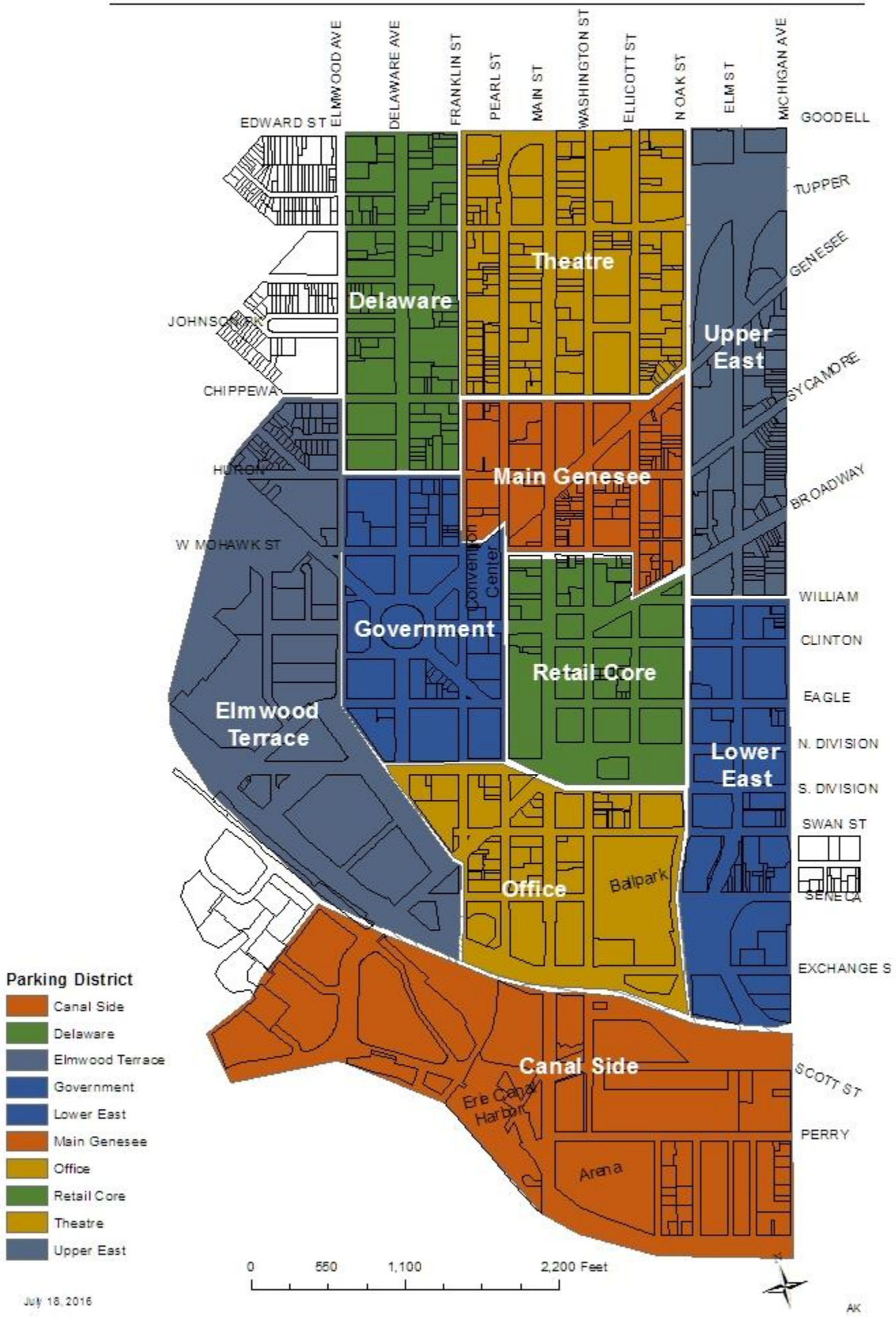
Publicly available parking is defined as spaces available to the general public, regardless of trip purpose. Private and/or restricted parking is only available to specific users. Off-street parking includes all public and private parking facilities while on-street parking consists of curbside spaces, including metered spaces, free spaces, and those reserved for authorized vehicles such as judges and police officers.

Table: Total Parking Supply

District	District Name	On-Street	Off-Street	Total Parking Supply
1	Delaware	349	2,663	3,012
2	Theatre	408	2,677	3,085
3	Upper East	174	2,241	2,415
4	Main/Genesee	299	3,352	3,651
5	Elmwood Terrace	322	4,571	4,893
6	Government	377	2,988	3,365
7	Retail Core	185	3,754	3,939
8	Lower East	175	2,916	3,091
9	Office	165	3,121	3,286
10	Canalside	339	6,451	6,790
	Total	**2,793**	**34,734**	**37,527**

The following map (updated in 2018) depicts the *Map: Parking Study Area and the Parking Districts.*

Downtown Parking Districts



Methodology:

Off-Street Parking Methodology:

Buffalo Place Inc. documents all off-street downtown parking in two reports that are available to the public: *Publicly Available Parking*, with pricing and management contact information; and *All Ramps and Lots*, with ownership, management, number of parking spaces and current utilization. Between May and July 2016, a survey of off-street parking facilities was conducted. Lots and ramps were visited between 10am and 2pm, which has been determined by previous studies to be the typical peak weekday period for off-street parking. Each parking facility was assigned a number. The number of spaces in each lot or ramp was inventoried, along with the number of cars parked at the time of the visit. The database of all parking facilities, ownership, management, public availability and pricing was updated. These *2016* reports are the basis of the analysis in the *2016-2018 Downtown Access Study* and are attached in Appendixes F1 and F2.

The off-street parking inventory was updated again in spring of 2018 and the *2018* reports are attached in Appendix F3 and F4.

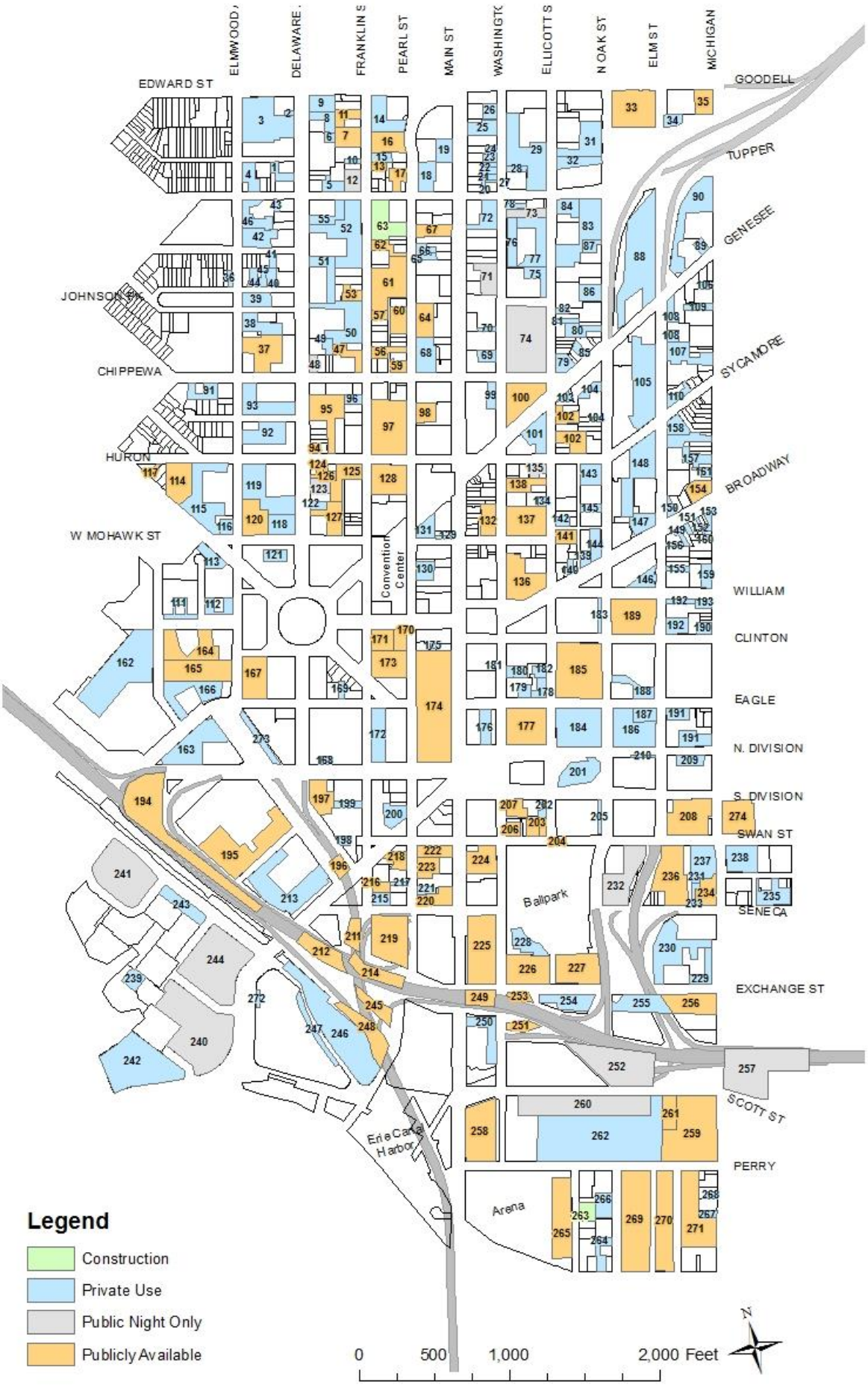
Downtown Buffalo includes 34,734 off-street parking spaces, of which 20,556 (59 %) are available to the general public. The remaining 14,178 spaces are in privately held facilities.

Table: Off-Street Public and Private Parking Supply

		Off-Street		Total Off-Street
District	**District Name**	**Public**	**Private**	**Parking Supply**
1	Delaware	889	1,774	2,663
2	Theatre	817	1,860	2,677
3	Upper East	380	1,861	2,241
4	Main/Genesee	2,888	464	3,352
5	Elmwood Terrace	2,130	2,441	4,571
6	Government	2,478	510	2,988
7	Retail Core	3,386	368	3,754
8	Lower East	823	2,093	2,916
9	Office	2,935	186	3,121
10	Canalside	3,830	2,621	6,451
	Total	**20,556**	**14,178**	**34,734**

The following, from the *Map: 2018 All Ramps and Lots* report shows the location of all off-street parking facilities. This is the updated 2018 version.

2018 Downtown Buffalo All Ramps and Lots



May 21, 2018

AK-DC

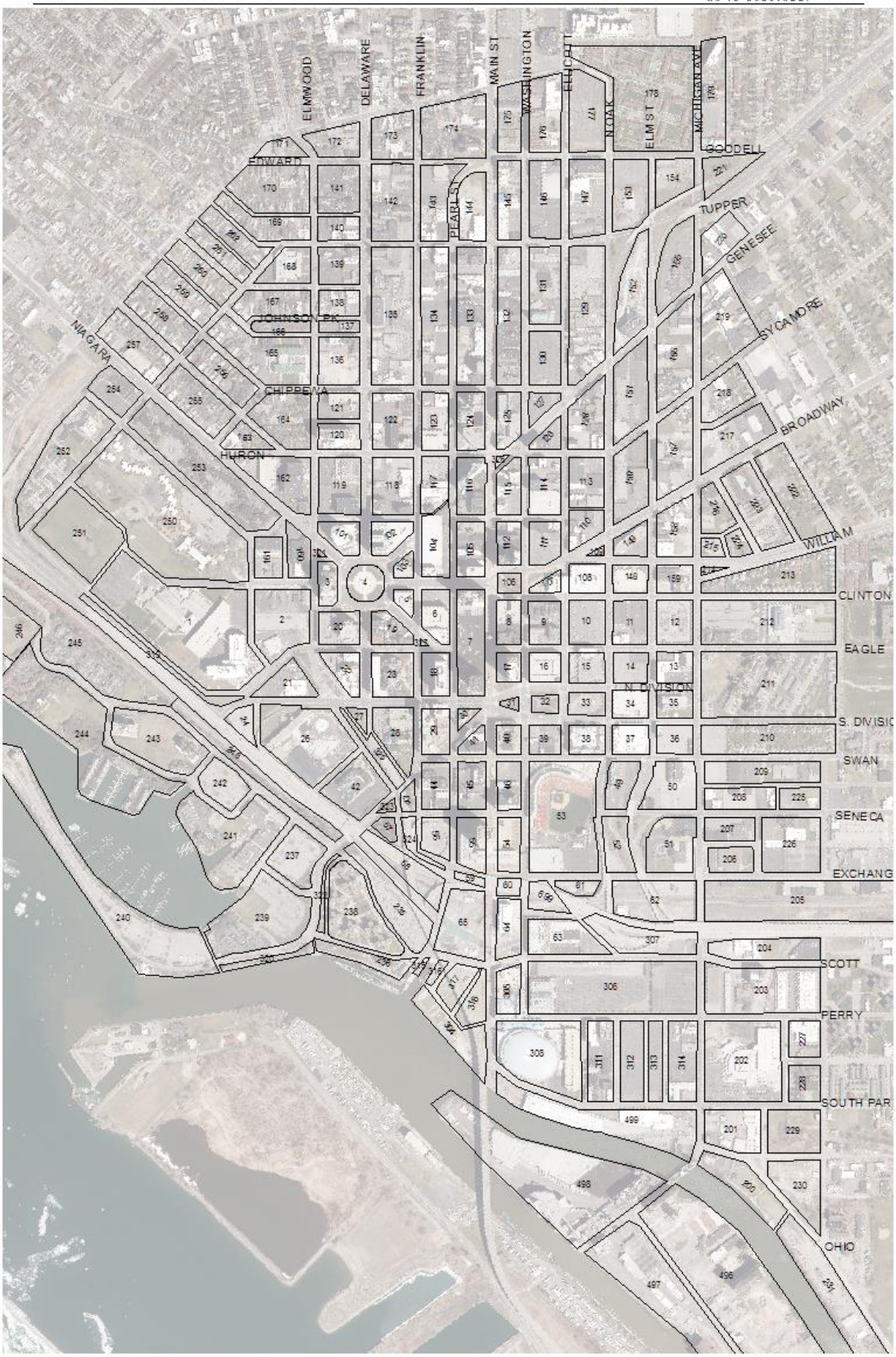
On-Street Parking Methodology:

Between July and September 2016, Buffalo Place managed a survey of on-street parking, with the assistance of a City of Buffalo Department of Parking Enforcement seasonal employee. The survey used license plate survey methodology. License plate numbers of all observed cars were documented, so that the parking duration and movement of specific vehicles could be determined. Data collectors observed on-street parking patterns on all downtown streets.

Each block within the study area was assigned an identification number, as well as block face numbers (1-north, 2-east, 3-south, and 4-west). Blocks with more or fewer sides were given the appropriate number of block faces. Irregularly shaped blocks were assigned face numbers in a clockwise direction starting with the block face closest to north.

The following map shows the location of each block within the downtown area – *Map: Downtown Buffalo Block Numbers.*

Downtown Buffalo Block Numbers



0 600 1,200 Feet

January 17, 2017

AK

Data collection sites were identified by block numbers and block face numbers. The data collectors surveyed parked cars during a 10-hour workday at one-hour intervals, between 8:00am and 6:00pm. Data collection occurred mid-week on Tuesdays, Wednesdays and Thursdays to control for lower summer-time downtown employee counts from long weekend vacations, etc. Data collectors recorded license plate numbers for each block face assigned for that day and walked their assigned route once per hour during the 10-hour study day. Information on parking duration, occupancy, turnover, and on-street regulations was collected. Information on illegally used spaces, loading zones and taxi stands was also collected.

Table: On-Street Parking Supply

District #	District Name	On-Street Supply Public	On-Street Supply Private	Total On-Street Supply
1	Delaware	336	13	349
2	Theatre	408	0	408
3	Upper East	174	0	174
4	Main/Genesee	292	7	299
5	Elmwood Terrace	264	58	322
6	Government	231	146	37
7	Retail Core	163	22	185
8	Lower East	152	23	175
9	Office	119	46	165
10	Canalside	339	0	339
	Total	**2,478**	**315**	**2,793**

There are 2,793 on-street parking spaces, which includes 43 disabled spaces. Additionally, 113 load zones and 381 Illegal spaces were documented, totaling 3,263 on-street parking spaces used throughout the day. Curb parking is broken into the following categories:

- Government/Restricted (Spaces limited to Government Officials, Judicial Court System, Police, Sheriff/Law Enforcement, Fire Department, NFTA) – 286 Spaces (10%)
- Short Term Parking – 1,284 spaces - generally metered at $1/hour for 2 hours maximum or less (49%)
- All-Day Metered Spaces – 342 Spaces (12%) – metered at $2/day –on streets where parking turnover is not needed, i.e. back offices, storage facilities, manufacturing
- Free Parking (29%) - mostly located in low demand, periphery areas, where meter fees would not generate sufficient revenue to cover the cost of parking meters and maintenance

The following map shows the *Curb Parking Regulations for Downtown Buffalo* during the summer of 2016.

Draft Downtown Buffalo Parking

November 7, 2016

AK

Parking Analysis:

Buffalo Place staff then analyzed the results of the On-Street and Off-Street Parking Surveys. A practical capacity was determined to measure the level of service of a parking facility. As occupancy rises within a parking facility or at the curb, drivers spend more time driving around looking for a parking spot. This is referred to as "cruising". Studies show that drivers tend to begin to "cruise" when only 15% of parking spaces remain. For this study, a practical capacity for each parking facility was set at 85%. Previous studies used a 90% rate; however, more recent standards from Urban Land Institute and other parking researchers, such as Donald Shoup, find the 85% standard to be more realistic. The Access & Infrastructure Committee of Buffalo Place Inc. determined at the April 19, 2017 meeting that the 85% standard for practical capacity of parking facilities should be used in this study.

Off-Street Parking Utilization

System wide, downtown off-street facilities were 63% occupied during the peak period, with 22,034 of 34,734 available spaces occupied, leaving a surplus of 7,490 spaces downtown wide. When focusing on the more congested Downtown Core, the off-street parking surplus shrinks to 886, with the Retail Core District having a deficit of 130 spaces and the Main/Genesee District having a surplus of only 18 spaces. The Office District, which is currently undergoing significant transition with six buildings being renovated, supplies the core surplus parking with 883 available spaces. This surplus will likely disappear after renovated buildings fill with tenants.

When looking at only publicly available off-street parking spaces, the downtown wide surplus drops to 4,258. Again, higher demand for parking in the Core is evident with less available publicly available parking, a surplus of only 739 spaces. Again, these surplus spaces are located in the Office District, where 831 surplus spaces currently exist. The Main/Genesee district has a deficit of 69 spaces and the Retail Core has a deficit of 215 spaces. Additionally, the Upper East district, with a small inventory of publicly available spaces, has a deficit of 24 spaces.

The following tables show the utilization data for public, private and total off-street parking spaces in each district.

Table: Total Off-Street Parking Utilization and Surplus/Deficit [1]

District #	District Name	Publicly Available	Private/ Restricted	Total Off-Street Parking Supply	Practical Capacity (85%)	Peak Occupancy	Percent	Surplus/ Deficit
1	Delaware	889	1,774	2,663	2,264	1,492	56%	772
2	Theatre	817	1,860	2,677	2,275	1,729	65%	546
3	Upper East	380	1,861	2,241	1,905	1,517	68%	388
4	Main/Genesee	2,888	464	3,352	2,849	2,831	84%	18
5	Elmwood Terrace	2,130	2,441	4,571	3,885	3,370	74%	515
6	Government	2,478	510	2,988	2,540	2,425	81%	115
7	Retail Core	3,386	368	3,754	3,191	3,321	88%	-130
8	Lower East	823	2,093	2,916	2,479	1,022	35%	1,457
9	Office	2,935	186	3,121	2,653	1,770	57%	883
10	Canalside	3,830	2,621	6,451	5,483	2,557	40%	2,926
	Total	**20,556**	**14,178**	**34,734**	**29,524**	**22,034**	**63%**	**7,490**

[1] Highlighted rows indicate districts considered full because parked vehicles exceed practical capacity

Table: Publicly Available Off-Street Parking Utilization [1]

District	District Name	Publicly Available Parking Supply	Practical Capacity (85%)	Peak Occupancy	Percent	Surplus/ Deficit
1	Delaware	889	756	576	65%	180
2	Theatre	817	694	485	59%	209
3	Upper East	380	323	347	91%	-24
4	Main/Genesee	2,888	2,455	2,524	87%	-69
5	Elmwood Terrace	2,130	1,811	1,222	57%	589
6	Government	2,478	2,106	2,052	83%	54
7	Retail Core	3,386	2,878	3,093	91%	-215
8	Lower East	823	700	401	49%	299
9	Office	2,935	2,495	1,664	57%	831
10	Canalside	3,830	3,256	851	22%	2,405
	Total	**20,556**	**17,473**	**13,215**	**64%**	**4,258**

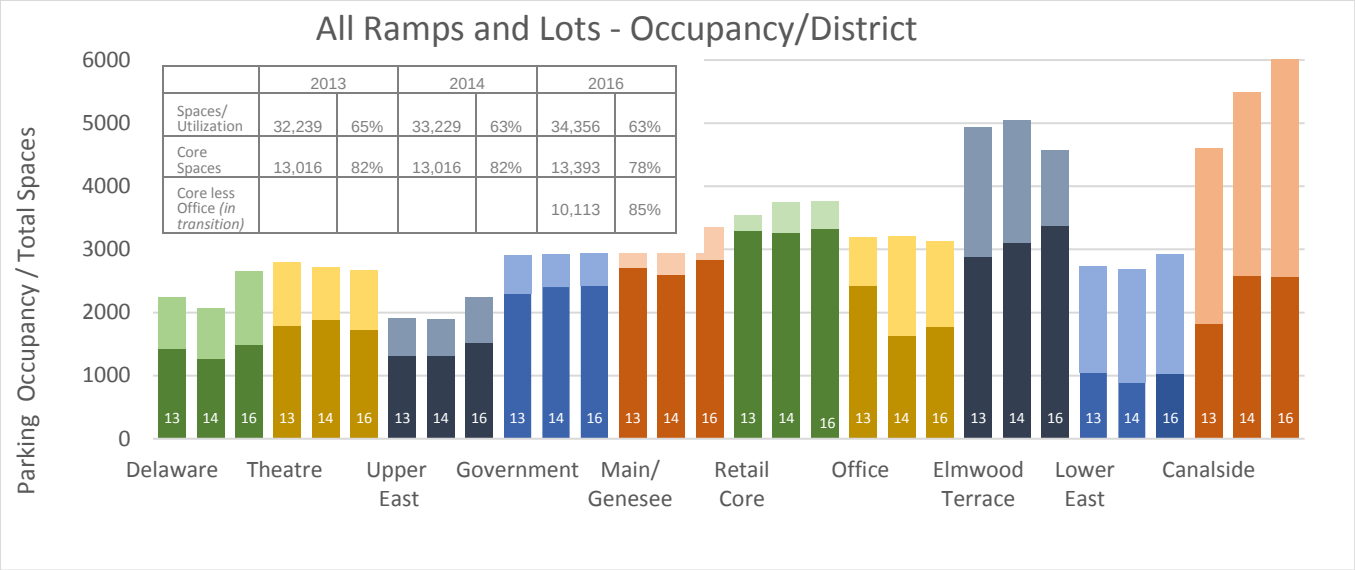
Table: Restricted Off-Street Parking Utilization[2]

	District Name	Private/Restricted Parking Supply	Practical Capacity (85%)	Peak Occupancy	Percent	Surplus/ Deficit
1	Delaware	1,774	1,508	916	52%	592
2	Theatre	1,860	1,581	1,244	67%	337
3	Upper East	1,861	1,582	1,170	63%	412
4	Main/Genesee	464	394	307	66%	87
5	Elmwood Terrace	2,441	2,075	2,148	88%	-73
6	Government	510	434	373	73%	61
7	Retail Core	368	313	228	62%	85
8	Lower East	2,093	1,779	621	30%	1,158
9	Office	186	158	106	57%	52
10	Canalside	2,621	2,228	1,706	65%	522
	Total	**14,178**	**12,051**	**8,819**	**62%**	**3,232**

The following *Charts: Compare Off-Street Parking In 2013, 2014 And 2016* for the total downtown supply and for publicly available off-street parking.

[1] Highlighted rows indicate districts considered full because parked vehicles exceed practical capacity

[2] Highlighted rows indicate districts considered full because parked vehicles exceed practical capacity



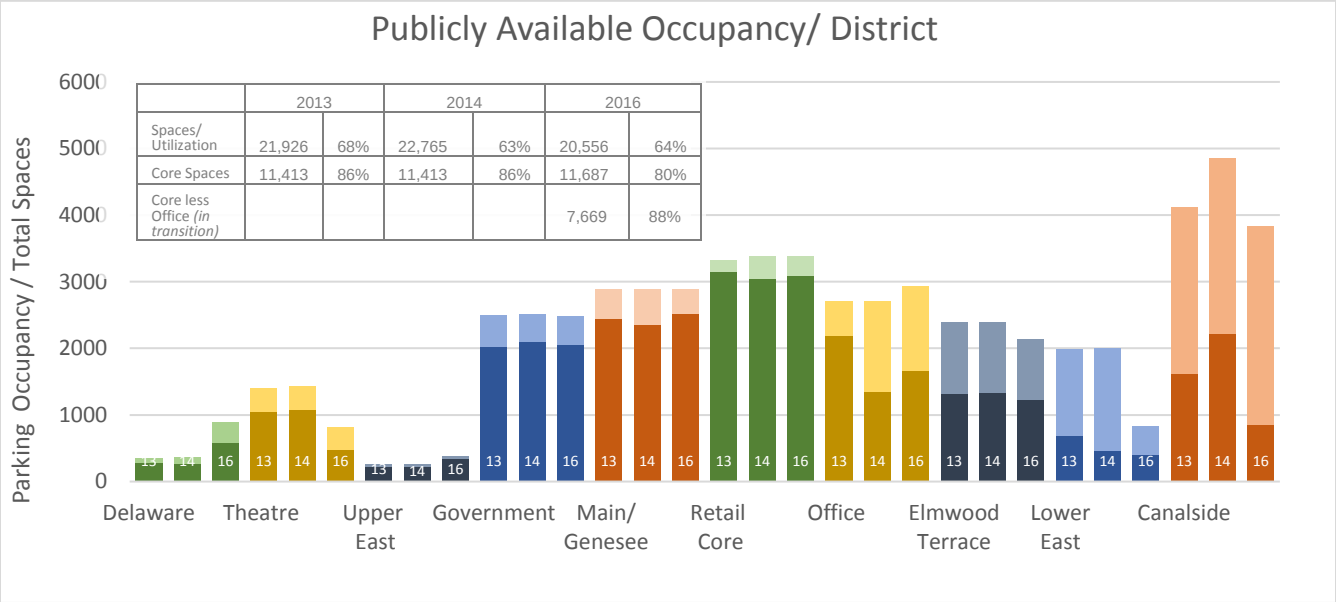


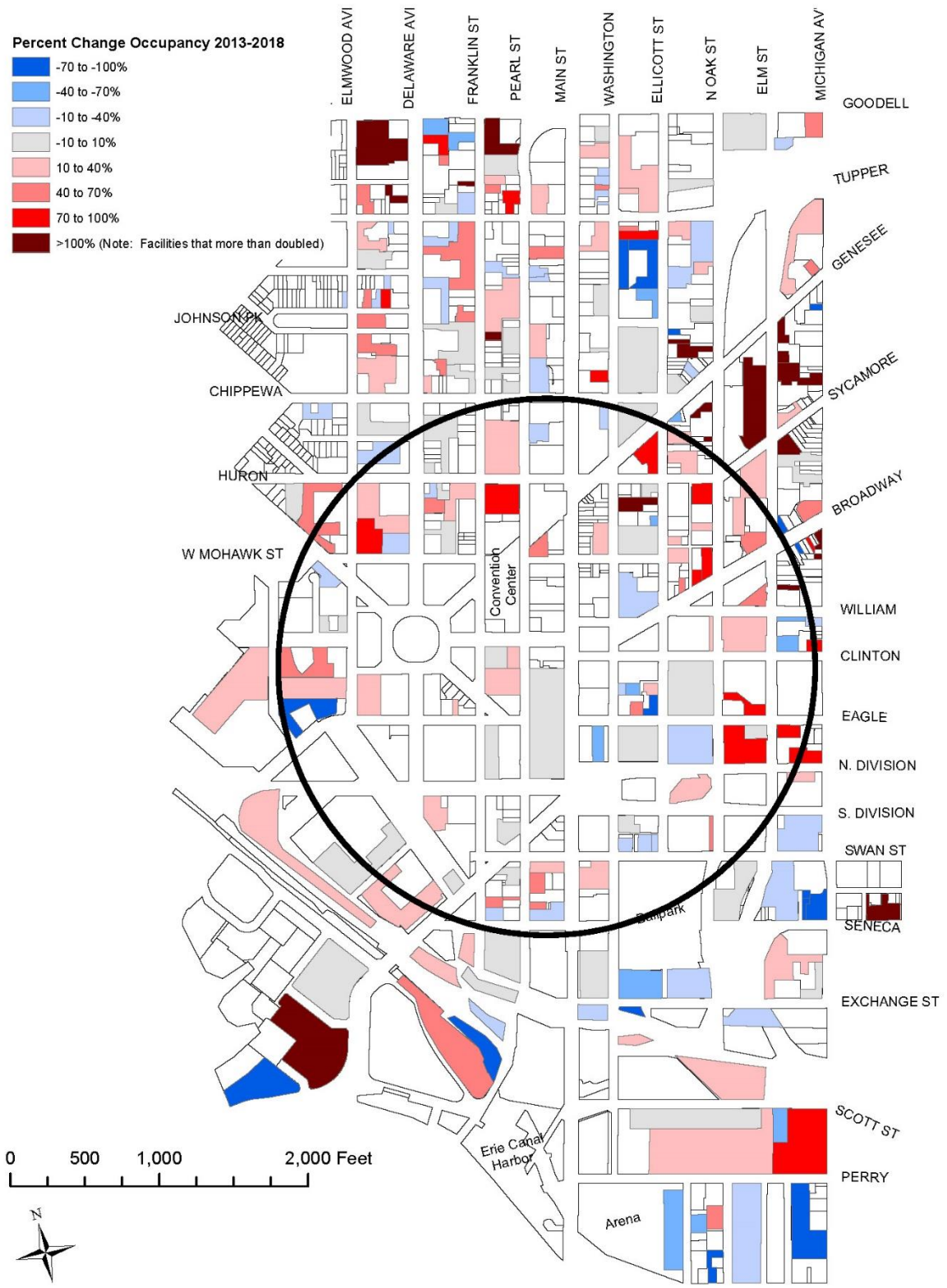
CHART NOTES:

- Total spaces available for each district in 2013, 2014 and 2016 are displayed
- The dark tone indicates occupied spaces, light tone shows remaining available spaces
- The Office District is in transition with six of 15 Office District facilities undergoing change, so utilization is displayed with and without the Office District

The overall supply of off-street parking has increased, but the increase has been in private restricted parking. Publicly available parking has declined over the last five years. The number of occupied parking spaces in the total and publicly available supply has been consistent. The chart depicts that the bulk of parking is taking place in the core, and shows how close to capacity the former Retail Core and Main/Genesee areas are, as well as the surplus of special event parking supply near the Arena and under the State highways.

The following maps illustrate the same changes in parking utilization (occupancy) over the last five years, and over the last two years since the Downtown Access Study started. While the number of parked cars has increased, it has been private restricted parking, not publicly available parking, that has increased. The following *Map: 2013 to 2018 Change in Parking Occupancy* shows an increase of 1,106 more parked cars in all parking facilities, but a loss of 76 parked cars in publicly available parking facilities over this five year period. The *Map: 2016 to 2018 Change in Parking Occupancy* documents changes that occurred during the Downtown Access Study. An additional 1,057 vehicles were documented as parking in downtown facilities, but the number of vehicles parked in publicly available parking facilities increased by 554.

2013 to 2018 Change in Parking Occupancy

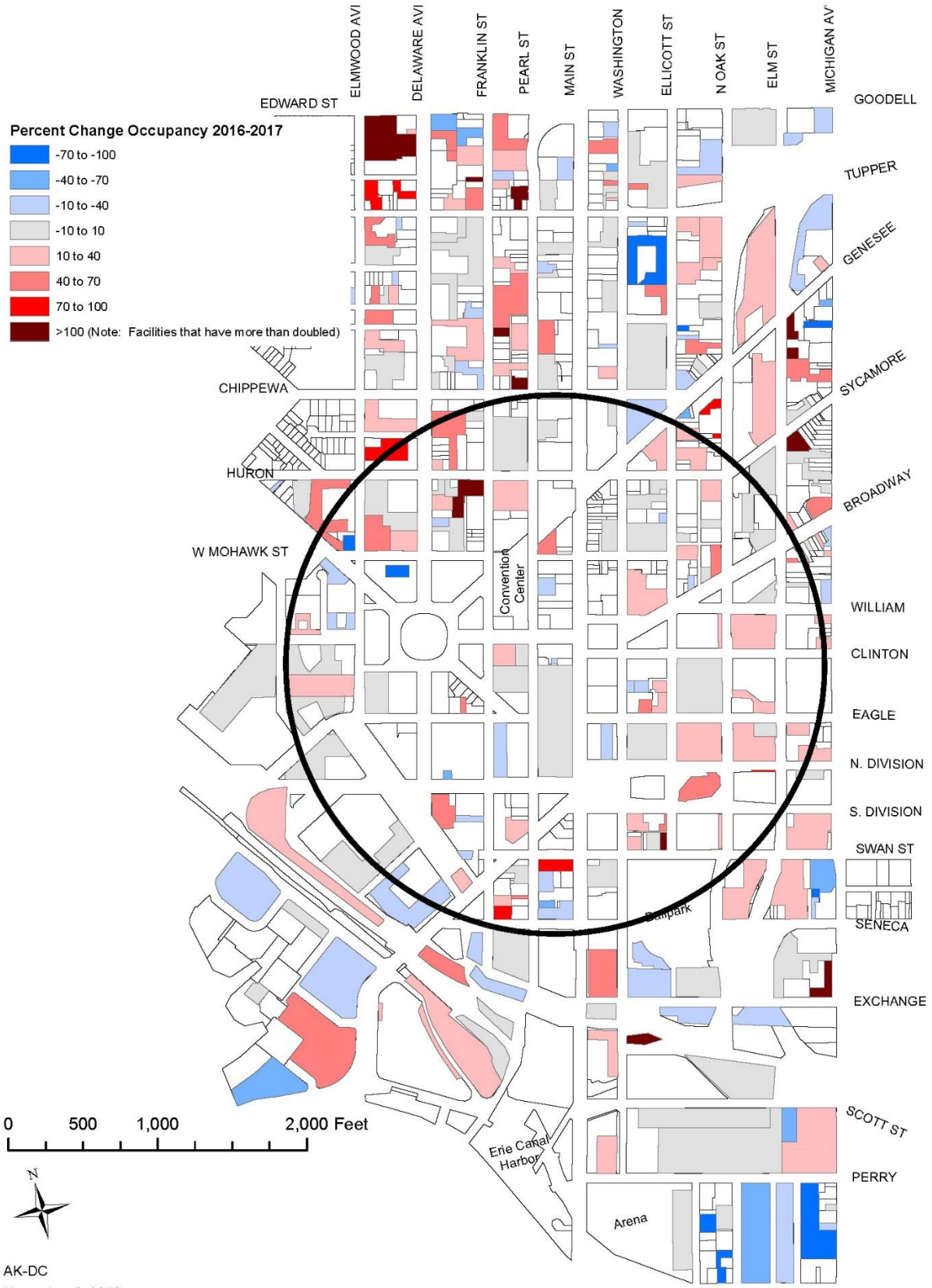


AK-DC

November 6, 2018

Increased # of Cars in the 134 Facilities with Increased Occupancy between 2013 & 2018	2924
Decreased # of Cars in the 94 Facilities with Decreased Occupancy between 2013 & 2018	-1818
Total Occupancy Increased 2013-2018	**1106**
Subtotal Increased # of Cars in the 41 Publicly Available Facilities with Increased Occupancy between 2013 & 2018	1256
Subtotal Decreased # of Cars in the 38 Publicly Available Facilites with Decreased Occupancy between 2013 & 2018	-1332
Subtotal Publicly Available Occupancy Decrease 2013-2018	**-76**
NOTE: This only includes lots that had parking in both 2013 and 2018	

2016 to 2018 Change in Parking Occupancy



AK-DC
November 6, 2018

Increased # of Cars in the 155 Facilities with Increased Occupancy between 2016 & 2018	2175
Decreased # of Cars in the 92 Facilities with Decreased Occupancy between 2016 & 2018	-1118
Total Occupancy Increased 2016-2018	**1057**
Subtotal Increased # of Cars in the 55 Publicly Available Facilities with Increased Occupancy between 2016 & 2018	1010
Subtotal Decreased # of Cars in the 25 Publicly Available Facilites with Decreased Occupancy between 2016 & 2018	-456
Subtotal Publicly Available Occupancy Increase 2016-2018	**554**
NOTE: This only includes lots that had parking in both 2017 and 2018	

Initial Off-Street Parking Findings:

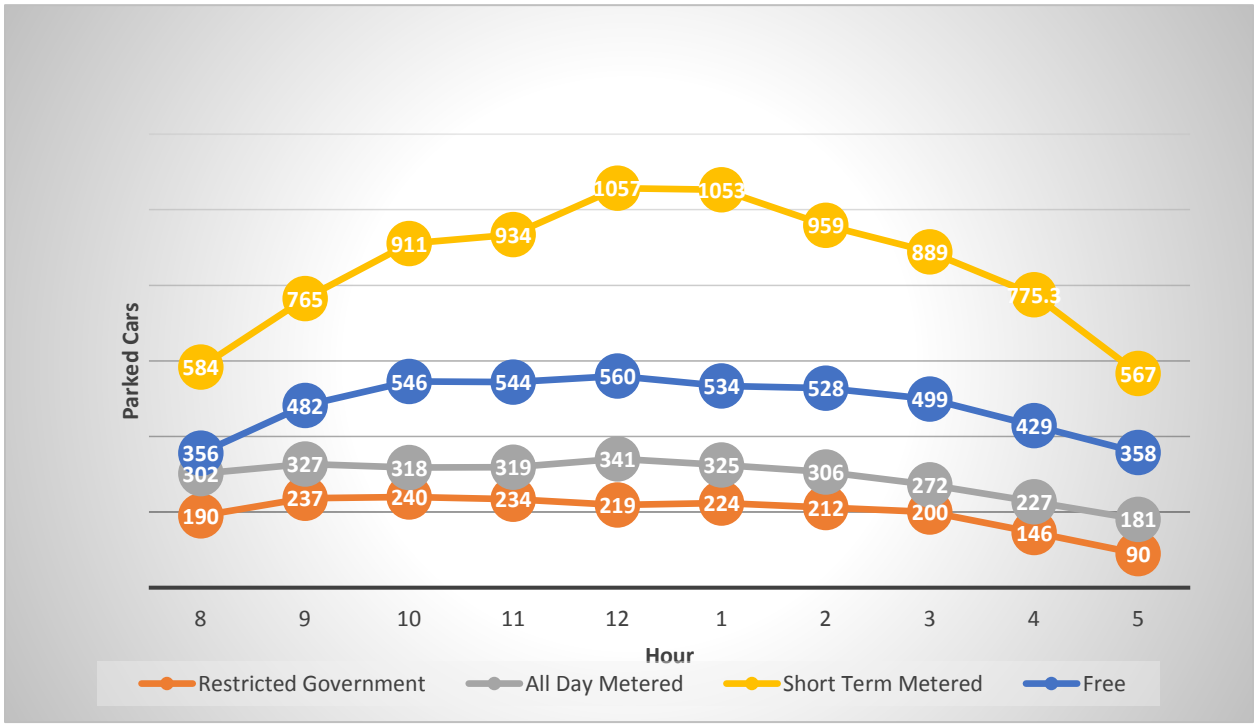
- There is a surplus of off-street parking in Downtown, but not located within walking distance of core employment.
- 59% of off-street parking is available to the general public, but 41% is held for private use by the owner and/or tenants.
- Parking available to the general public is used more intensely than private parking, with two Core districts over capacity and a third only 54 spaces from capacity.
- Privately held parking is less efficiently used, with a greater percentage of unused spaces.
- Privately held parking has been increasing in Downtown and parking available to the general public has been declining. Upcoming changes in ownership of two Buffalo Civic Auto Ramps will further reduce the portion of the parking supply that is available to the general public, increasing the difficulty of creating an efficient supply of parking that will meet the needs of downtown business, but not overwhelm other uses.
- One solution to lack of available parking in the core is to find ways to utilize available periphery parking spaces.

On-Street Utilization

Turnover and Occupancy

The survey found that 6,792 cars park in on-street spaces per day. Of those downtown curb parkers, 5,880 were in legal spaces, 695 were in illegal spaces and 165 were in loading zones. Although system-wide, 80% of available on-street spaces in Downtown Buffalo were occupied, each district experienced different utilization patterns during the peak period. At the peak hour, 6 out of 10 of the downtown districts were considered to be at high occupancy, with a surplus of only 130 spaces for all of Downtown Buffalo. Within the Core, there is a deficit of 78 spaces. Additionally, the Theatre District has a deficit of 14 spaces. This leads to an issue for short-term parking patrons. Turnover parking is necessary for retail stores, restaurants and business visitors.

Chart: Number of Cars Parked Per Hour

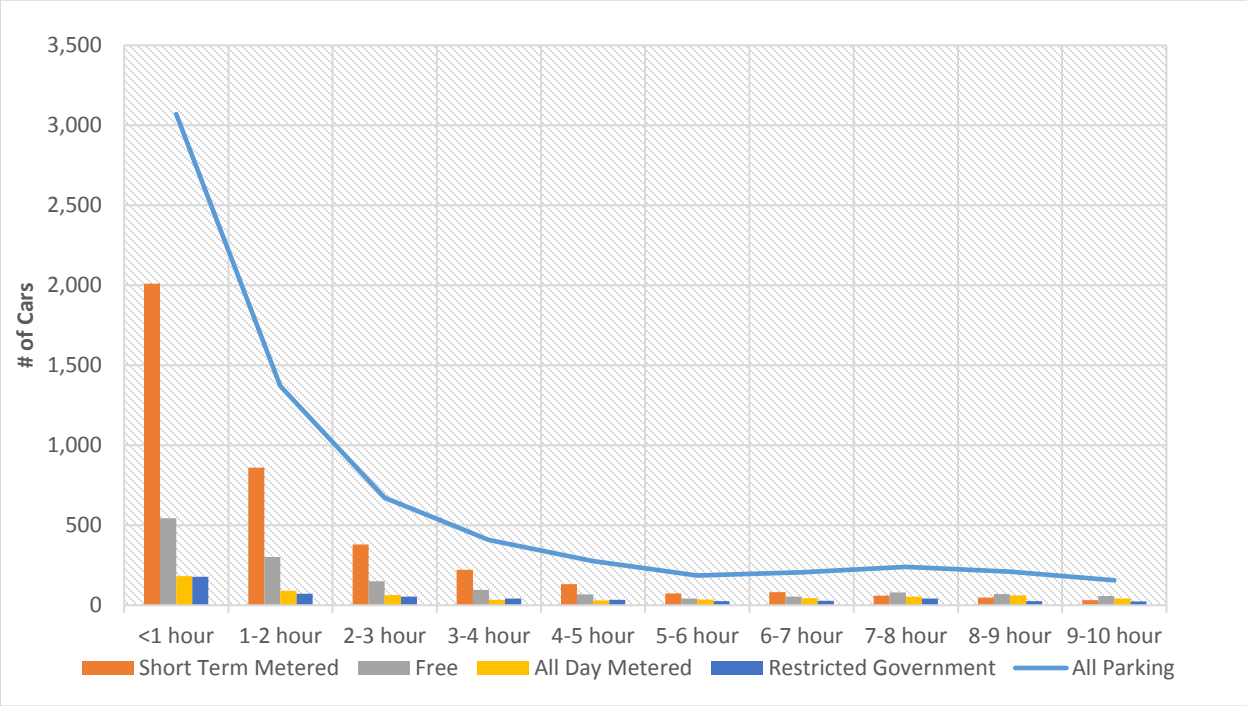


Looking at number of cars parked per hour, it was determined that the peak hour for curb parking was between 12 noon and 1pm.

The next issue examined was parking duration. The average overall duration for downtown curb parking was 2.26 hours. A study from the last decade showed the average parking duration was around 1 hour. It is difficult to provide the turnover parking needed to support downtown businesses when parkers return to add additional time to parking meters.

The following chart shows curb parking durations.

Chart: Curb Parking Duration



Buffalo Place staff looked at on-street parking to see what areas work and what areas could benefit from adjustment of parking duration, rates, restrictions or enforcement frequency. For short-term parking, areas that were working well had regular turnover of vehicles and were well used but had some spaces available (high turnover and high-occupancy). For long-term parking, areas that were working well had lower turnover and high occupancy. Overall, the survey found that parking works well on 52% of downtown blocks, and 48% should be reviewed to consider adjustment.

The following charts show thresholds for high, medium and low turnover and occupancy for short-term parking meters and all day parking meters.

Short-term parking locations with medium and low occupancy and turnover do not serve Downtown as well as desired. These locations may require changes in price, location or enforcement of regulations to become more efficient and serve as a resource to Downtown.

Long duration parking spaces with low occupancy may improve if pricing matches the market. If the market demand is so low that the daily fee does not cover the City's expense to collect parking fees and to purchase and maintain parking meters, then parking should be free. If turnover is medium and high, indicating demand for short-term parking, changes in parking duration should be made to support the nearby businesses generating turnover parking.

Chart: Parking Turnover and Occupancy for Short Term Parking

High Turnover, High Occupancy Turnover = 100– 85% Occupancy = 100-75%	Medium Turnover High Occupancy Turnover = 84-70% Occupancy = 100-75%	Low Turnover High Occupancy Turnover = Below 70% Occupancy = 100-75%
High Turnover, Medium Occupancy Turnover = 100– 85% Occupancy = 74-50%	Medium Turnover, Medium Occupancy Turnover = 84--70% Occupancy = 74-50%	Low Turnover, Medium Occupancy Turnover = Below 70% Occupancy = 75-50%
High Turnover, Low Occupancy Turnover = 100– 85% Occupancy= Below 50%	Medium Turnover, Low Occupancy Turnover = 84-70% Occupancy= Below 50%	Low Turnover, Low Occupancy Turnover = Below 70% Occupancy= Below 50%

Chart: Parking Turnover and Occupancy for All Day Parking

High Turnover, High Occupancy Turnover = >2 car/day Occupancy = 100-75% park ≤2 hours	Medium Turnover High Occupancy Turnover = 2 car/day Occupancy = 100-75% park ≤2 hours	Low Turnover High Occupancy Turnover = 1 car/day Occupancy = 100-75% park ≤2 hours
High Turnover, Medium Occupancy Turnover = >2 car/day Occupancy = 74-50% park ≤2 hours	Medium Turnover, Medium Occupancy Turnover = 2 car/day Occupancy = 74-50% park ≤2 hours	Low Turnover, Medium Occupancy Turnover = 1 car/day Occupancy = 74-50% park ≤2 hours
High Turnover, Low Occupancy Turnover = >2 car/day Occupancy= Below 50% park ≤2 hours	Medium Turnover, Low Occupancy Turnover = 2 car/day Occupancy= Below 50% park ≤2 hours	Low Turnover, Low Occupancy Turnover = 1 car/day Occupancy= Below 50% park ≤2 hours

Shaded = Parking Acceptable

Unshaded = Parking Adjustment May be Necessary

The following three *Maps: Turnover and Occupancy for Curb Parking* show areas where on-street parking is working and areas where parking adjustments may be necessary. The first two maps rank parking occupancy and turnover for short-duration and for all-day parking. The map translates the more complicated symbolism to simple green and red lines to identify which streets function as intended (green), and which streets could be improved with adjusted regulations (red). For short-term parking, our goal is for parking to be well used, with some spaces available, with regular turn over through-out the day. For all day parking, the goal is for parking be well used, with one or two cars parking a day. More frequent turnover in an all-day area indicates demand for short-term parking, which would be the priority for curb spaces.

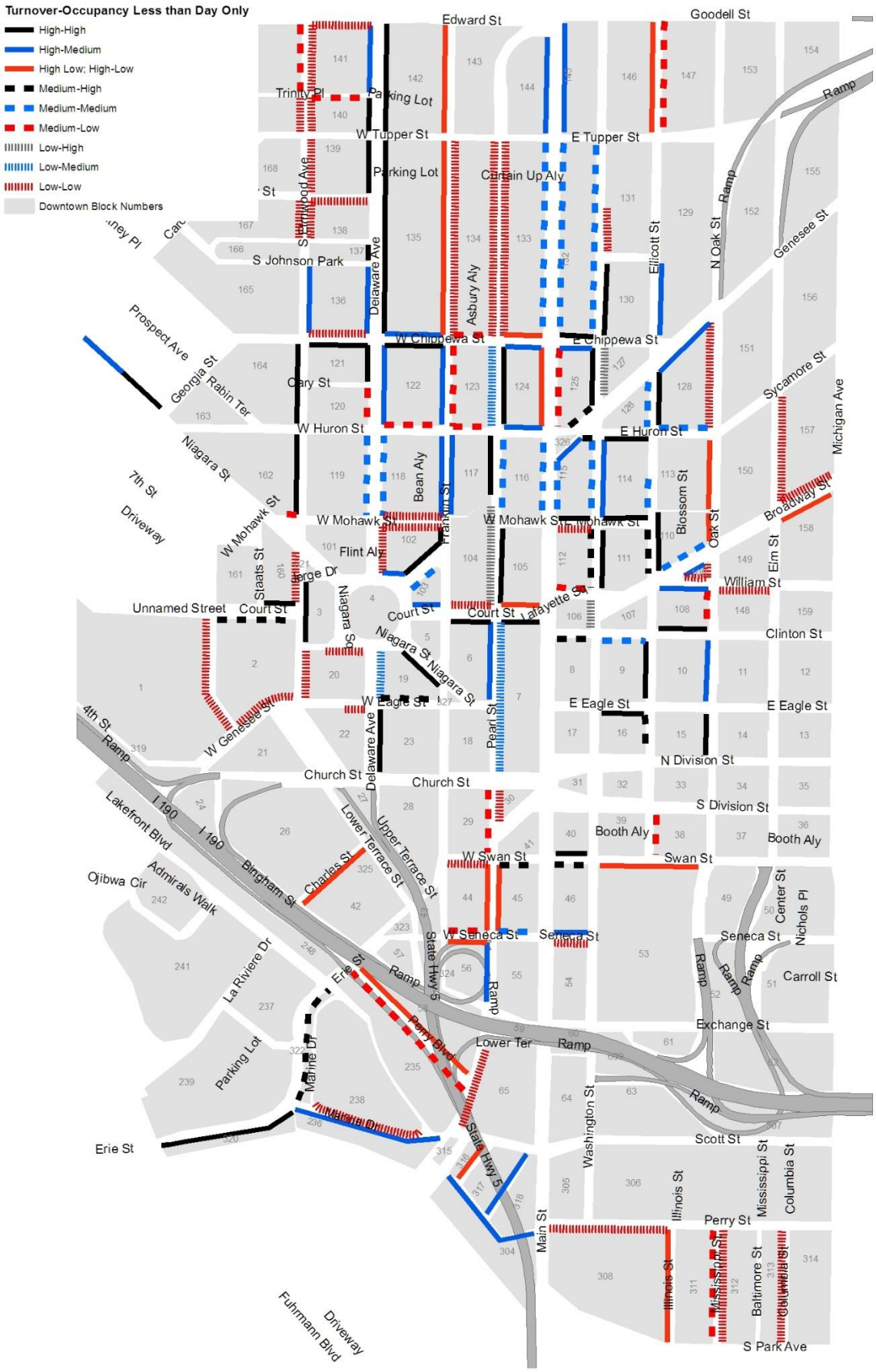
In the two *Turnover and Occupancy for Curb Parking* maps, parking duration and turnover is illustrated with solid lines and parking occupancy is illustrated with solid, dashed and dotted lines. Positive turnover is black, medium is blue and negative turnover is shown with red. For the short-term map, positive turnover is frequent and negative turnover is long duration parking, since we want many people to be able to park for two-hours or less. For the all-day map, positive turnover shown in black is low, with only one or two cars parked throughout the day. High parking occupancy is illustrated by solid lines, medium occupancy has a dashed line and low occupancy has at dotted line.

The third map identifies that 56% of on-street parking is working fine, illustrated in green. The 45% of curb-parking that is not working as intended is illustrated in red, and would benefit from changes in duration, moderate changes in fee, peak hour restrictions or other issues.

Based on these results, Buffalo Place Staff identified some 300 potential spaces to be considered for additional parking. The Committee reviewed and passed along the recommendations to the City of Buffalo Public Works and Parking Departments. City Departments are now reviewing the list to identify which spaces can be put in place and which may not be feasible. Details can be found in Appendix M. Of the changes recommended, the status is as follows:

- 288 proposed spaces are under review,
- 14 have been approved and implemented,
- 10 were found not possible by City Public Works.

2016 Downtown Buffalo Turnover/Occupancy - Short Term



December 12, 2018

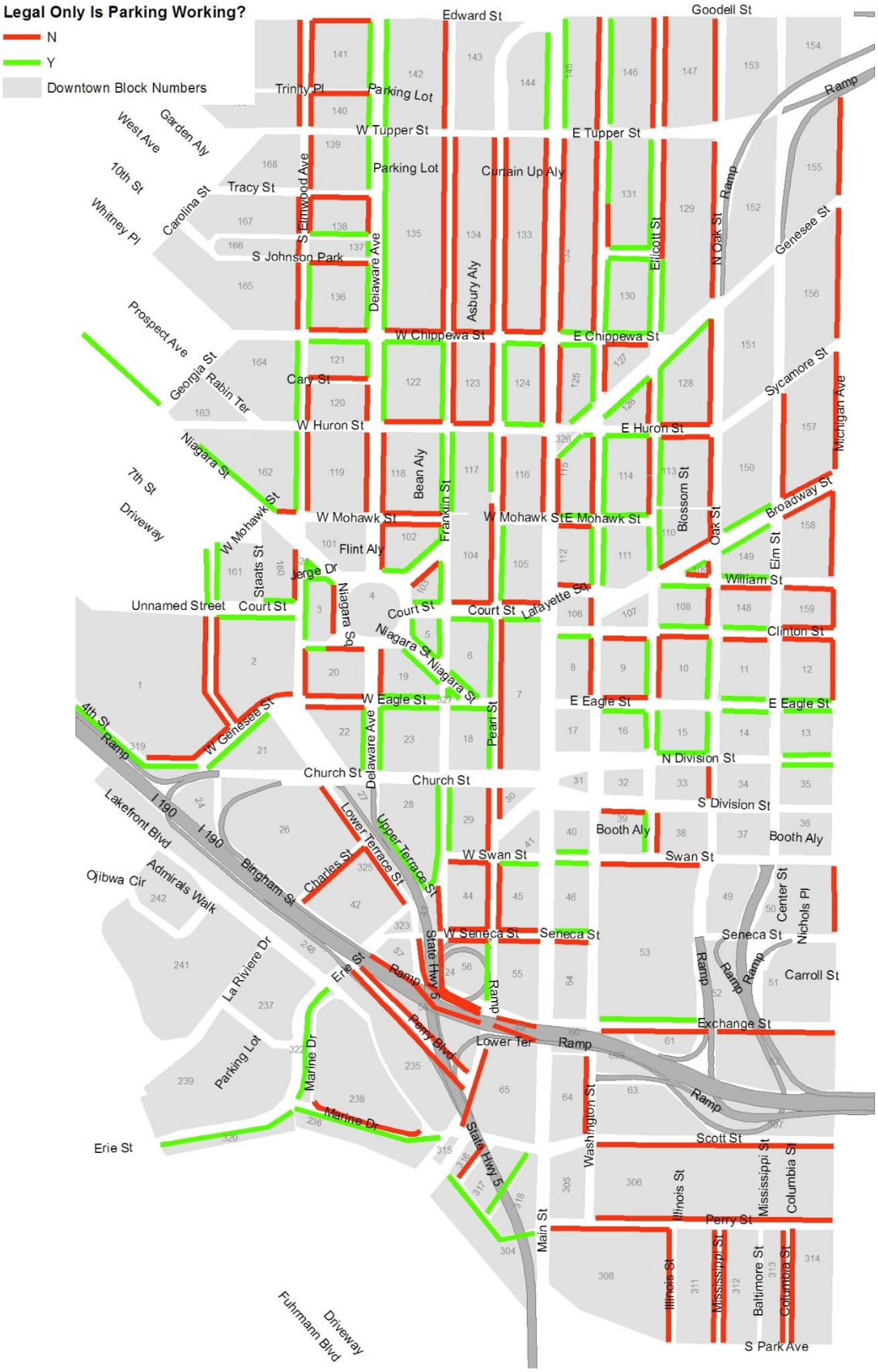
AK

2016 Downtown Buffalo Turnover/Occupancy - Day

December 12, 2018

AK

2016 Downtown Buffalo Is Parking Working?



December 12, 2018

AK

On-street parking overall had a utilization rate of 80% for Downtown, with five out of ten districts having a utilization rate of more than 85%. Within the Core, there is a deficit of 78 spaces. When looking at publicly available curb parking, six out of ten districts had a utilization rate of more than 85 percent, with the Core having a parking deficit of 95 spaces. Restricted curb parking had lower utilization, with only the Lower East district having a utilization of more than 85%.

The following tables summarize on-street parking utilization and the surplus/deficit for each district.

Table: Total On-Street Parking Utilization and Surplus/Deficit [1]

District #	District Name	On-Street Supply	Practical Capacity (85%)	Peak Occupancy	Percentage	Surplus/ Deficit
1	Delaware	349	297	243	70%	54
2	Theatre	408	347	361	88%	-14
3	Upper East	174	148	99	57%	49
4	Main/Genesee	299	254	253	85%	1
5	Elmwood Terrace	322	274	271	84%	3
6	Government	377	320	347	92%	-27
7	Retail Core	185	157	164	89%	-7
8	Lower East	175	149	124	71%	25
9	Office	165	140	185	112%	-45
10	Canalside	339	288	197	58%	91
	Total	**2,793**	**2,374**	**2,244**	**80%**	**130**

Table: Publicly Available On-Street Parking Utilization and Surplus/Deficit [2]

District #	District Name	On-Street Supply	Practical Capacity (85%)	Occupancy	Percentage	Surplus/ Deficit
1	Delaware	336	286	242	72%	44
2	Theatre	408	347	361	88%	-14
3	Upper East	174	148	99	57%	49
4	Main/Genesee	292	248	251	86%	-3
5	Elmwood Terrace	264	224	240	91%	-16
6	Government	231	196	227	98%	-31
7	Retail Core	163	139	153	94%	-14
8	Lower East	152	129	98	64%	31
9	Office	119	101	148	124%	-47
10	Canalside	339	288	197	58%	91
	Total	**2,478**	**2,244**	**2,016**	**81%**	**90**

[1] Highlighted rows indicate districts considered full because parked vehicles exceed practical capacity

[2] Highlighted rows indicate districts considered full because parked vehicles exceed practical capacity

Table: Restricted On-Street Parking Utilization and Surplus/Deficit [1]

District #	District Name	On-Street Supply	Capacity (85%)	Occupancy	Percentage	Surplus/ Deficit
1	Delaware	13	11	1	8%	10
2	Theatre	0	0	0	0%	0
3	Upper East	0	0	0	0%	0
4	Main/Genesee	7	6	2	29%	4
5	Elmwood Terrace	58	49	31	53%	18
6	Government	146	124	120	82%	4
7	Retail Core	22	19	11	50%	8
8	Lower East	23	20	26	113%	-6
9	Office	46	39	37	80%	2
10	Canalside	0	0	0	0%	0
	Total	**315**	**268**	**228**	**72%**	**40**

Initial On-Street Parking Findings:

- Curb parking regulations and restrictions have generally been in place for ten years. This is a good time for review, to identify if more spaces can be put to efficient use for short-term parkers who patronize downtown retail, restaurant and service businesses, or can be made available for longer duration parkers who work or live nearby.
- Curb parking availability is limited for the general public, especially short-term parking spaces. Longer duration parking at short-term meters and increased restricted parking contribute to this problem.
- The above observation is supported by the Downtown Buffalo 2018 Transportation Mode Survey. 2% of respondents report regularly feeding a short duration meter for all day parking. The 47 respondents represent 752 Downtown employees. This removes 59% of the publicly available short duration downtown parking meters from use. If not occupied by all-day parkers, at least 3,000 short duration patrons would have used those 2 hour metered spaces each day.
- Restricted parking spaces have lower occupancy rates than curb parking available to the public. Perhaps some restricted parking could be freed up for use by the general public. There also is additional informal restricted parking usage with parked cars placing government department signs and restaurant menus on their dashboards, not all of which are authorized.
- Average duration of parked vehicles is over 2 hours, and most spaces are signed for 2 hour parking maximum. Parkers are returning to feed meters and staying for longer durations at short-term meters. Mid-range duration parkers needing 3 to 5 hours of parking seem to be feeding meters regularly. This may be due to increased pricing of off-street short-term parking.
- It may also be time to consider balancing curb-parking rates to make feeding meters less attractive. Most itinerant off-street parking rates result in parkers paying for a day of parking within 2 or 3 hours. If a parker needs 3 to 5 hours of parking, they must pay the full daily rate. Perhaps a possible solution could be tested at a public parking facility by increasing the number of hours of parking to five before charging the maximum daily rate.
-

[1] Highlighted rows indicate districts considered full because parked vehicles exceed practical capacity

System-Wide Parking Utilization

The results of the On- and Off-Street Surveys were combined to look at system wide utilization. The following tables combine the on and off-street parking utilization summaries for each district. Overall, the study area is 65% utilized during the peak period, with a surplus of 7,620 spaces. Within the Core, the surplus shrinks to 808 spaces, with a deficit of 137 spaces in the Retail Core District.

Table: Total System-Wide Parking Utilization with Surplus/Deficit [1]

District	District Name	On-Street	Off-Street	Total Parking Supply	Practical Capacity (85%)	Total Peak Occupancy	% Utilization	Surplus /Deficit
1	Delaware	349	2,663	3,012	2,560	1,735	58%	825
2	Theatre	408	2,677	3,085	2,622	2,090	68%	532
3	Upper East	174	2,241	2,415	2,053	1,616	67%	437
4	Main-Genesee	299	3,352	3,651	3,103	3,084	84%	19
5	Elmwood Terrace	322	4,571	4,893	4,159	3,641	74%	518
6	Government	377	2,988	3,365	2,860	2,772	82%	88
7	Retail Core	185	3,754	3,939	3,348	3,485	88%	-137
8	Lower East	175	2,916	3,091	2,627	1,146	37%	1,481
9	Office	165	3,121	3,286	2,793	1,955	59%	838
10	Canalside	339	6,451	6,790	5,772	2,754	41%	3,018
	Total	**2,793**	**34,734**	**37,527**	**31,898**	**24,278**	**65%**	**7,620**

[1] Highlighted rows indicate districts considered full because parked vehicles exceed practical capacity

Table: Publicly Available System-Wide Parking Utilization with Surplus/Deficit

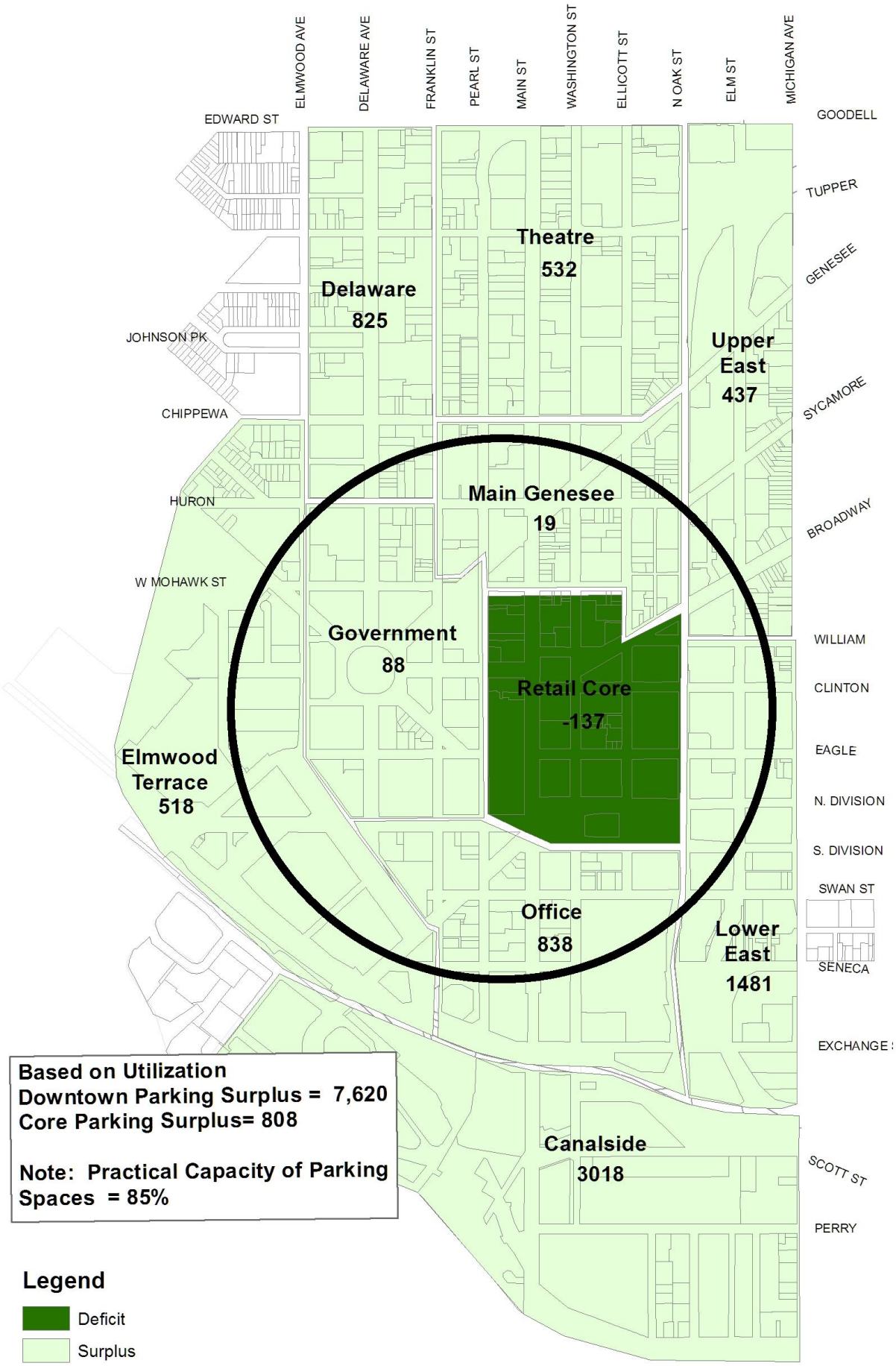
District	District Name	On-Street	Off-Street	Total Parking Supply	Practical Capacity (85%)	Total Peak Occupancy	% Utilization	Surplus /Deficit
1	Delaware	336	889	1225	1041	818	67%	223
2	Theatre	408	817	1225	1041	846	69%	195
3	Upper East	174	380	554	471	446	81%	25
4	Main-Genesee	292	2888	3180	2703	2775	87%	-72
5	Elmwood Terrace	264	2130	2394	2035	1462	61%	573
6	Government	231	2478	2709	2303	2279	84%	24
7	Retail Core	163	3386	3549	3017	3246	91%	-229
8	Lower East	152	823	975	829	499	51%	330
9	Office	119	2935	3054	2596	1812	59%	784
10	Canalside	339	3830	4169	3544	1048	25%	2,496
	Total	**2,478**	**20,556**	**23,034**	**19,579**	**15,231**	**65%**	**4,348**

Table: Private/Restricted System-Wide Parking Utilization with Surplus/Deficit

District	District Name	On-Street	Off-Street	Total Parking Supply	Practical Capacity (85%)	Total Peak Occupancy	% Utilization	Surplus /Deficit
1	Delaware	13	1,774	1,787	1,519	917	60%	602
2	Theatre	0	1,860	1,860	1,581	1,244	79%	337
3	Upper East		1,861	1,861	1,582	1,170	74%	412
4	Main-Genesee	7	464	471	400	309	77%	91
5	Elmwood Terrace	58	2,441	2,499	2,124	2,179	103%	-55
6	Government	146	510	656	558	493	88%	65
7	Retail Core	22	368	390	332	239	72%	93
8	Lower East	23	2,093	2,116	1,799	647	36%	1,152
9	Office	46	186	232	197	143	73%	54
10	Canalside	0	2,621	2,621	2,228	1,706	77%	522
	Total	**315**	**14,178**	**14,493**	**12,319**	**9,047**	**73%**	**3,272**

The next map illustrates *Map: Availability of Parking by District Based on the On-Site Survey*

2016 Surplus/Deficit Parking per District from On-Site Survey



Based on Utilization
Downtown Parking Surplus = 7,620
Core Parking Surplus= 808

Note: Practical Capacity of Parking Spaces = 85%

May 1, 2017

AK-DC

Land Use Based Parking Demand

The following analysis quantifies the relationship between land use activity and parking activity. Parking demand, as opposed to peak parking occupancy, relates to the statistical measure of need or desire, i.e. the number of people who would like to park underneath or next to their office building, retail center or destination. From a land use based demand perspective, a large office building without on-site parking would exhibit a high deficit figure, indicating that there is high demand without supply. Conversely, a stand-alone parking ramp would exhibit a high surplus figure, indicating there is high supply without demand. This allows for a measure of where people want to park and where the opportunity to park exists within Downtown Buffalo.

A detailed land use analysis was completed for all parcels within Downtown Buffalo. Data was collected from the City of Buffalo Assessment Department, realtors, building owners, and Buffalo Place survey and database. Land uses and associated building square footages were identified for each parcel and divided into the following categories:

- retail,
- restaurant,
- hotel,
- entertainment,
- office,
- residential,
- industrial/manufacturing,
- storage/warehouse,
- religious,
- charitable, and
- educational

The land uses were then compiled on a block-by-block basis.

The following chart and table show the breakdown of the 2017 Land Use Inventory.

See Appendix I2 to compare with the 2006 Land Use Inventory.

Chart: 2017 Parking Study Area - Uses in Buildings and Unimproved Lots

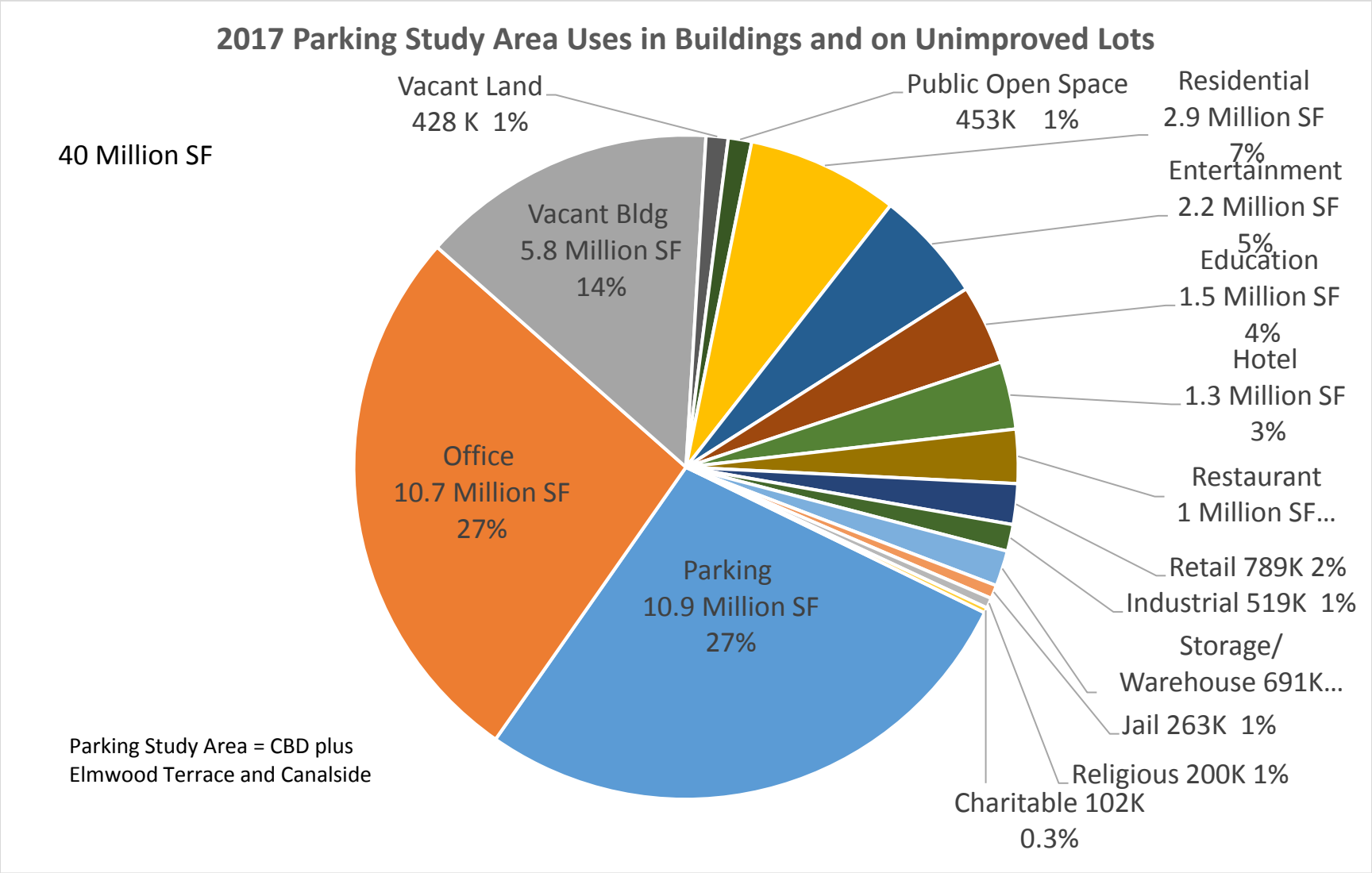


Table: Current Building Land Use Inventory by Square Feet (sf) by District

District Name	Retail sf	Restaurant sf	Hotel sf	Entertain-ment sf	Office sf	Residential sf	Industrial sf	Storage/ Warehouse sf	Jail sf	Education sf	Charitable sf	Religious sf	Vacant Building sf	Total Building sf
Delaware	56,600	173,894	382,428	127,425	822,274	269,762	900	7,423	0	68,233	15,837	22,382	286,974	2,234,132
Theater	162,193	119,656	22,808	229,810	489,616	398,272	137,572	71,625	0	236,700	20,360	72,300	433,125	2,394,037
Upper East	47,695	0	0	0	693,821	16,957	118,206	93,500	0	94,077	3,840	16,269	105,613	1,189,978
Main Genesee	74,891	146,444	255,691	17,725	1,180,997	266,504	11,425	96,411	0	0	34,322	0	563,170	2,647,580
Elmwood Terrace	104,509	33,148	217,202	0	1,372,439	55,848	0	29,241	0	421,210	8,607	11,906	86,078	2,340,188
Government	40,135	76,882	0	270,000	2,437,978	803,329	0	72,805	262,582	65,092	0	0	1,009,524	5,038,327
Retail Core	242,502	80,019	148,458	0	1,689,058	412,936	0	28,150	0	348,036	8,316	0	1,147,634	4,105,109
Lower East	10,686	2,500	0	69,000	387,176	141,160	0	21,697	0	59,780	0	0	199,802	891,801
Office	33,641	363,155	8,080	469,062	1,194,190	0	141,746	11,934	0	255,926	10,683	77,099	1,498,508	4,094,024
Canalside	15,754	52,287	248,721	980,430	417,815	576,173	109,031	257,650	0	0	0	0	422,488	3,080,349
Total	**788,605**	**1,047,985**	**1,313,388**	**2,163,452**	**10,685,364**	**2,940,941**	**518,880**	**690,436**	**262,582**	**1,549,054**	**101,965**	**199,956**	**5,752,917**	**28,015,525**
Percent	*3%*	*4%*	*5%*	*8%*	*38%*	*10%*	*2%*	*2%*	*1%*	*6%*	*0.4%*	*1%*	*21%*	

To determine parking demand, a parking demand factor was developed for each land use, and was multiplied by the square footage of each use in each block. Land use parking demand factors were developed using established standards collected by Urban Land Institute (ULI), Institute of Transportation Engineers (ITE), and from previous studies of Downtown Buffalo by Desman Associates and Buffalo Place Inc.

Table: Parking Land Use Demand Factors

Land Use Type	Spaces needed per 1000 sf	Peak Hour Parking Use Factor
Office	2.4	80%
Retail	1	25%
Restaurant	1.4	20%
Hotel	1.5	20%
Entertainment	0.25	5%
Residential	1	40%
Industrial	1	85%
Storage	0.4	100%
Charitable	0.4	100%
Educational	0.5	100%

The land use demand factors calculate the number of parking spaces required per 1,000 square feet of occupied space. The factor was adjusted to reflect how active the use is at our midday, weekday peak hour, and if the use generates new trips to Downtown or if they are combined with another primary trip purpose. For example, 75% of retail parking demand is either not during the peak hour of noon to 1:00pm on a weekday, or the parker is already Downtown for another use, for example, as an office worker. Similarly, very few entertainment patrons need to park at the mid-day, weekday peak hour, estimated at 5%. Rather, they need park in the evening and on weekends.

Parking demand factors were adjusted until the calculated demand for parking balanced with the same number of parked cars observed during the 2016 survey of Downtown parking. The final factors used resulted in a difference of only 72 fewer cars calculated than observed in the field.

Table: Comparison between Calculated Demand and Observed Occupancy

District Name	Calculated Parking Demand	Peak Occupancy	Difference
Delaware	1,911	1,735	176
Theatre	1,450	2,090	-640
Upper East	1,535	1,616	-81
Main/Genesee	2,572	3,084	-512
Elmwood Terrace	2,979	3,641	-662
Government	5,186	2,772	2,414
Retail Core	3,714	3,485	229
Lower East	842	1,146	-304
Office	2,683	1,955	728
Canalside	1,334	2,754	-1,420
Total	**24,206**	**24,278**	**-72**

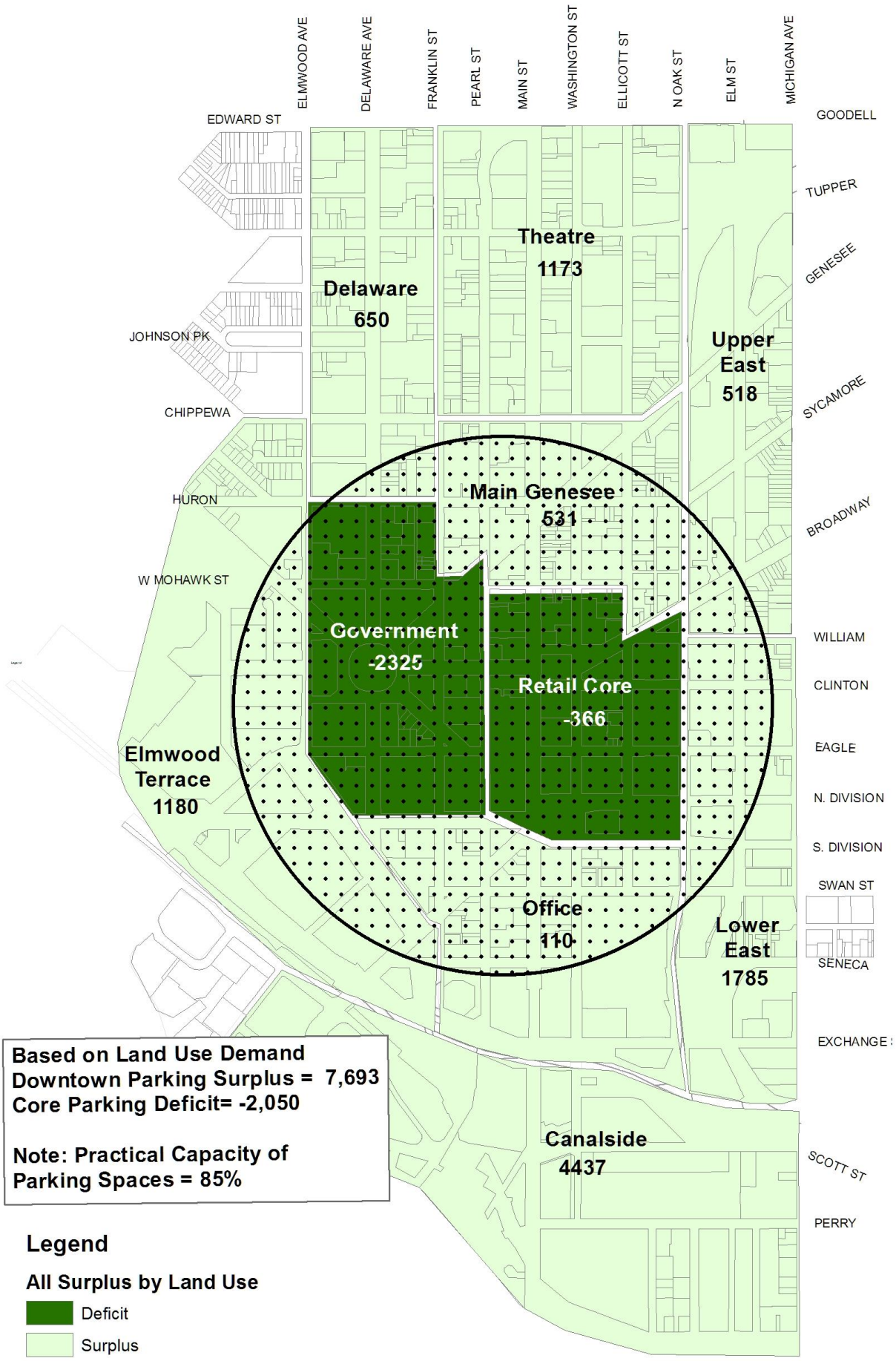
The following table and map shows the parking surplus/deficit based on calculated parking demand. This depicts where parkers would choose to park based on the land use associated with that block. The deficit of parking within the Core is more pronounced than that observed during the parking study, with a deficit of 2,050 spaces. This deficit indicates that a sizable group of Core parkers now travels to parking spaces at the periphery of downtown and walk into the Core.

Table: Surplus/Deficit Parking Based on Land Use Demand[1]

District	District Name	Total Parking Supply	Practical Capacity	Land Use Demand	Surplus/ Deficit
1	Delaware	3,012	2,560	1,911	650
2	Theater	3,085	2,622	1,450	1,173
3	Upper East	2,415	2,053	1,535	518
4	Main Genesee	3,651	3,103	2,572	531
5	Elmwood Terrace	4,893	4,159	2,979	1,180
6	Government	3,365	2,860	5,186	-2,326
7	Retail Core	3,939	3,348	3,714	-366
8	Lower East	3,091	2,627	842	1,785
9	Office	3,286	2,793	2,683	110
10	Canalside	6,790	5,772	1,334	4,437
	Total	**37,527**	**31,898**	**24,206**	**7,692**

[1] Highlighted rows indicate districts considered full because parked vehicles exceed practical capacity

2016 Surplus/Deficit per District from Calculated Land Use



April 28, 2017

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Additional Land Use Discussion

Parking as a Land Use

The volume of parking as a proportion of Downtown has been discussed at length with estimates as high as 50% of Downtown's land area. The 2017 Land Use inventory, updated in 2018, found 10,374,942 square feet of parking of all types including ramps, lots, private and publicly available. Parking is 26% of the 39.6 million square feet of land and buildings in Downtown Buffalo. These parking areas cover 33% of the 19.7 million square foot surface footprint of Downtown.

Consolidation of parking lots into efficient structured parking has been discussed as a goal since the *Queen City Hub* plan for Downtown Buffalo was released in 2004. Ramps and garages make up 46% of Downtown's parking square footage, but only take up 4 % of the Downtown footprint and 13% of the total parking footprint. Parking lots make up 54% of parking square footage and 28% of the Downtown footprint. Please note the * below on how footprint was calculated for parking ramps and garages, based on first floor use.

	Square Footage	Percent of Total Parking	Percent of Total Building Square Footage	Percent of Downtown Footprint
Total Downtown Building Square Footage	39,651,547		100%	
Total Downtown Footprint	*19,692,593*			*100%*
Total Parking Square Footage	**10,374,942**		**26%**	
Total Public Parking	5,601,145	54%	14%	
Total Private Parking	4,773,797	84%	12%	
Total Ramp Parking Square Footage	**4,766,916**	**46%**	**12%**	
Public Ramp	3,810,654	37%	10%	
Private Ramp	956,262	9%	2%	
Total Surface Lot Parking Square Footage	**5,608,026**	**54%**	**14%**	***28%***
Public Surface Lot	1,790,491	17%	5%	*9%*
Private Surface Lot	3,817,535	37%	10%	*19%*
Total Ramp Parking Footprint*	***810,104***			***4%***
*Private Ramp Parking Footprint**	*181,835*			*1%*
*Public Ramp Parking Footprint**	*628,269*			*3%*
Total Parking Footprint *	***6,418,130***			***33%***

*Parking Footprints for Parking Ramps are calculated based on first floor use. The footprint is listed as parking if that is the first floor use. It is not listed as parking when the first floor has another use, such as retail. For example, Adam Ramp is listed as parking, but Main Place Mall Ramp is not because the first floor is retail and vacant. Parking is below the building at the basement levels.

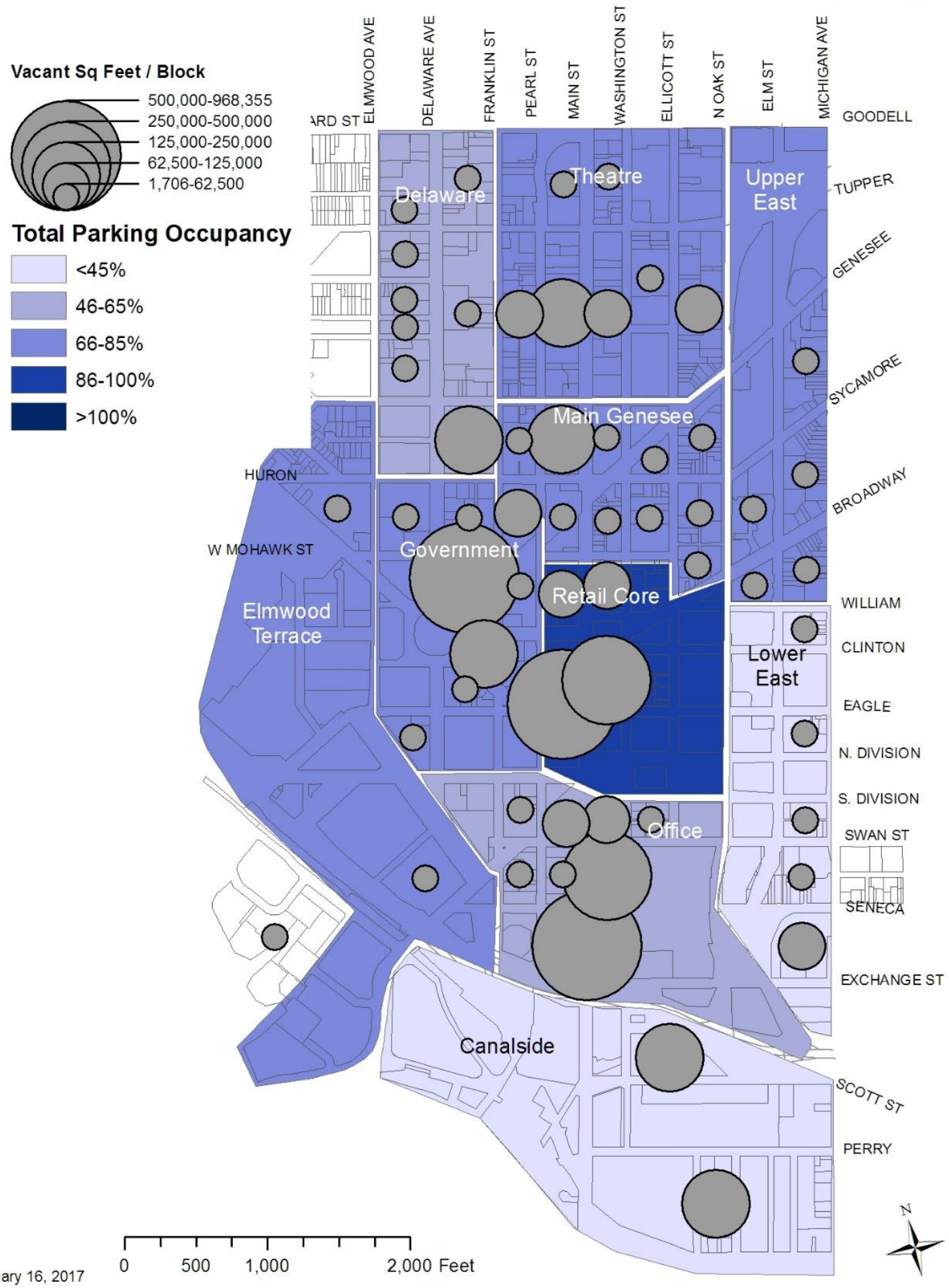
Vacant Building Space

Since a priority goal of this study is to support building occupancy, it is important to focus on vacant building spaces. There is currently 5.7 million square feet of vacant building space within the study area. The following map shows building vacancy per block in gray, displayed over off-street parking occupancy per downtown district. Areas currently over capacity, such as the former Retail Core and Main/Genesee districts are also the sites of large building vacancy.

The historic Office District is clearly in transition, with six major buildings being considered for development or under construction. Completion of the projects at these buildings will affect Downtown Core parking.

Occupancy of vacant building space is complicated by the lack of parking in the Downtown Core. Property owners, developers and realtors report difficulty securing tenant commitments without being able to identify parking and access solutions for potential users. Solutions are needed before the vacant space can become occupied, Illustrated in the Motivational Map on page 24.

2016 Parking Occupancy and Building Vacancy



January 16, 2017

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Future Parking Conditions

Future parking surplus/deficit conditions for Downtown Buffalo were forecasted by adjusting existing parking demand, by projections of the parking supply and demand expected from future development projects likely to be completed over the next five years, and from continued trends in office occupancy, the dominant Downtown land use. The same land-use demand factors developed for existing uses were applied to future projects.

Data on future projects was compiled by Buffalo Place using a variety of sources including the City of Buffalo Office of Strategic Planning, Buffalo Urban Development Corporation, Buffalo Rising, Buffalo News, Business First and interviews with developers who assisted with project details and likely timing. Given the speculative nature of some of the projects and lack of final design information, best guess assumptions were used. The expected parking demand generated by new projects and increased office occupancy was applied to the existing publicly available parking supply. While privately available parking is not fully used, it is reserved for use by the owner and tenants and is not generally available to satisfy new/additional demand.

The following table lists developments anticipated to occur over the next five years and estimates the peak parking demand based on future land use and parking ratios.

Parking Surplus/Deficits per Block from Likely Development Projects 2017 - 2022[1]

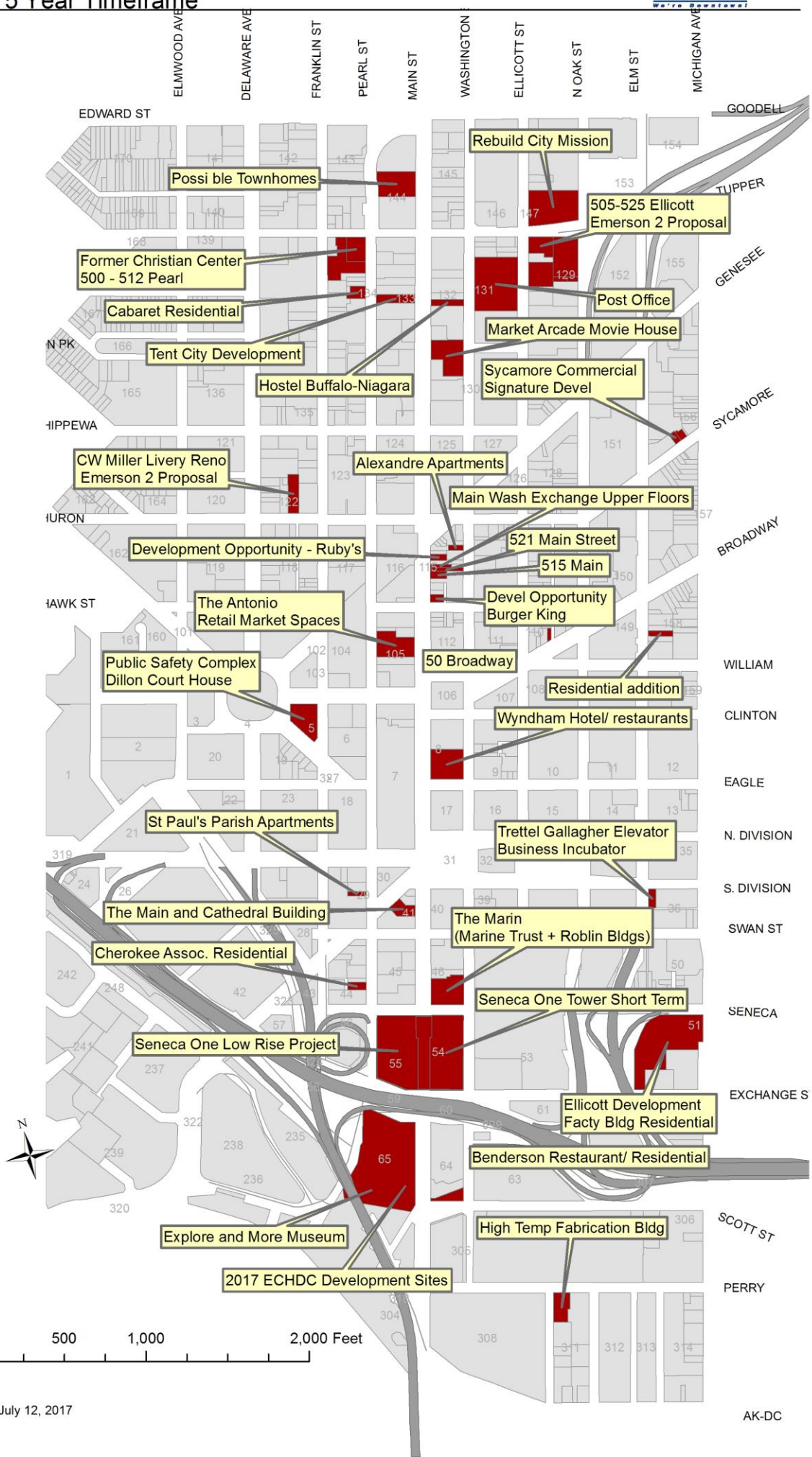
BLOCK #	Development Project	Sum of Peak Demand for Parking	Sum of New Parking Provided	Sum of Operational Capacity	Sum of Existing Parking Displaced	Sum of Peak Hour Surplus/ Deficit
5	Public Safety Complex - Dillon Court House	347	0	0	0	-347
8	Wyndham Hotel/restaurants	112	0	0	0	-112
29	St Paul's Parish Apartments	8	0	0	0	-8
36	Trettel Gallagher Elevator Incubator	41	0	0	0	-41
41	The Main and Cathedral Building	107	0	0	0	-107
44	Cherokee Assoc. Residential	6	0	0	0	-6
46	The Marin (Marine Trust /Roblin Bldgs.)	66	37	31	0	-34
51	Ellicott Development Factory Building Residential	23	0	0	0	-23
64	East Canal Restaurant/Residential	24	0	0	0	-24
65	Explore and More Museum	51	0	0	0	-51
	2017 ECHDC Devel Parcels (2)	67	0	0	0	-67
105	The Antonio - Retail Market Spaces	5	0	0	0	-5

[1] Highlighted rows indicate Development project results in increased parking deficit

Parking Surplus/Deficits per Block from Likely Development Projects 2017 – 2022 continued[1]						
BLOCK #	Development Project	Sum of Peak Demand for Parking	Sum of New Parking Provided	Sum of Operational Capacity	Sum of Existing Parking Displaced	Sum of Peak Hour Surplus/ Deficit
110	50 Broadway	2	0	0	0	-2
115	515 Main	8	0	0	0	-8
	521 Main Street	7	0	0	0	-7
	Alexandre Apartments	8	0	0	0	-8
	Development Opportunity - Ruby's	9	0	0	0	-9
	523 Main/500 Washington Upper Floors	2	0	0	0	-2
	Development Opportunity Burger King	2	0	0	0	-2
122	CW Miller Livery Reno- Emerson 2 Proposal	46	0	0	0	-46
129	505-525 Ellicott Emerson 2 Proposal	246	408	347	202	-101
131	Ellicott Post Office Reuse	0	0	0	0	0
132	Hostel Buffalo-Niagara Building	3	0	0	0	-3
	Market Arcade Movie House	1	0	0	0	-1
133	Tent City Development	9	20	17	0	8
134	Cabaret Residential	4	0	0	0	-4
	Former Christian Center (w/ 500 Pearl)	18	0	0	0	-18
	500 Pearl - Ellicott Development Project	129	390	332	109	93
144	Possible Townhomes 700 Block	8	20	17	0	9
147	Rebuild City Mission	65	38	32	38	-71
156	Sycamore Commercial Signature Devel	18	0	0	0	-18
158	Residential Addition Elm Street	8	25	21	0	13
311	High Temp Fabrication Building	145	0	0	0	-145
399	Seneca One Ancillary Building	86	0	0	0	-86
	Seneca One Tower Short Term Project	288	0	0	0	-288
Grand Total		**1,970**	**938**	**797**	**349**	**-1,522**

[1] Highlighted rows indicate Development project results in increased parking deficit

2017 Likely Development Projects
5 Year Timeframe



July 12, 2017

AK-DC

The following table presents future development based parking surplus/deficits and their impact on existing public parking within each district and for the study area as a whole.

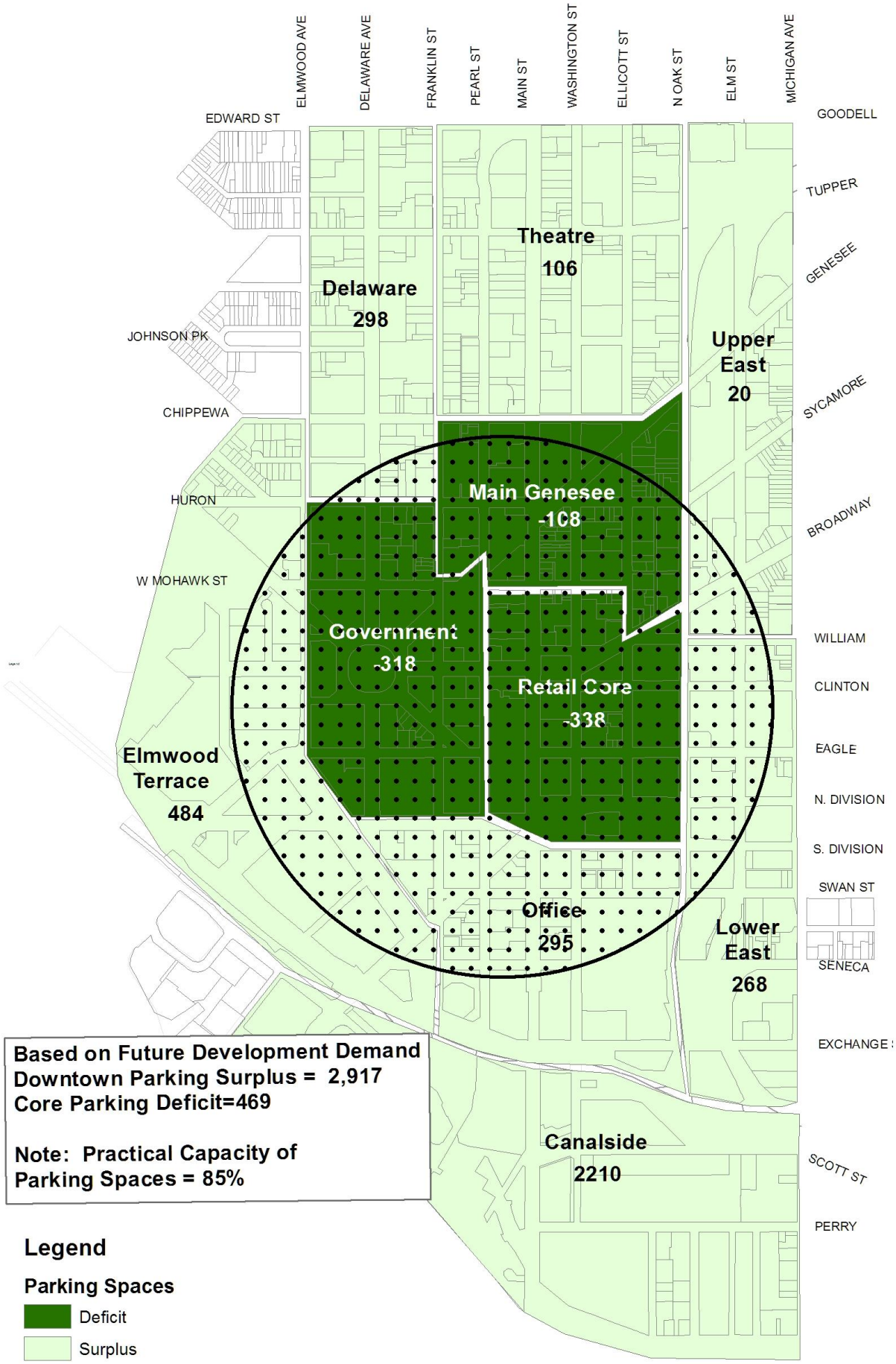
Table: Future Surplus/Deficit Conditions [1]

District	District Name	Publicly Available Parking Supply	Practical Capacity	Peak Occupancy	Existing Surplus Deficit	Development Impact	Future Surplus/ Deficit
1	Delaware	1,192	1,013	669	344	-46	298
2	Theater	1,225	1,041	846	195	-89	106
3	Upper East	554	471	446	25	-5	20
4	Main Genesee	3,180	2,703	2,774	-71	-37	-108
5	Elmwood Terrace	2,289	1,946	1,462	484	0	484
6	Government	2,707	2,301	2,272	29	-347	-318
7	Retail Core	3,549	3,017	3,238	-221	-117	-338
8	Lower East	965	820	488	332	-64	268
9	Office	3,047	2,590	1,766	824	-529	295
10	Canalside	4,169	3,544	1,048	2,496	-286	2,210
	Total	**22,877**	**19,445**	**15,009**	**4,436**	**-1,520**	**2,916**

System-wide, there will be a surplus of 2,916 spaces, although three of the districts are expected to have a parking deficit in the future. The largest impacts will be felt in the core districts, Main-Genesee, Government and Retail Core, which will experience a shortage of 108 spaces, 318 and 338 spaces respectively.

[1]Highlighted rows indicate districts considered full because parked vehicles exceed practical capacity

2016 Surplus/Deficit per District from Calculated Future Development



June 6, 2017

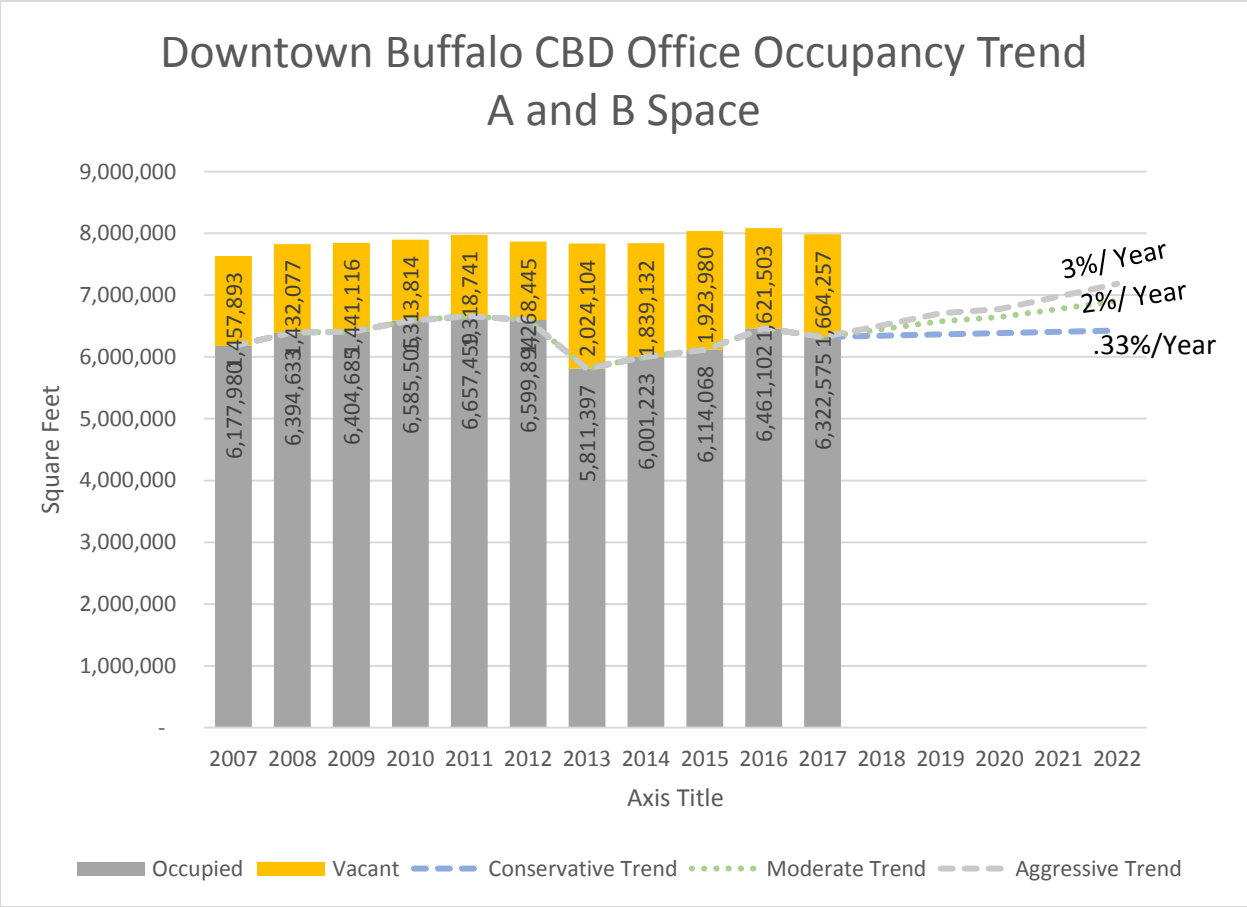
AK-DC

Office Absorption

In addition to incorporating the impacts of likely new development into future surplus/deficit conditions, office absorption was also projected for Downtown Buffalo. As in previous studies, only Class A and B office space was reviewed. Vacant Class C space is thought to be more likely to become occupied through development projects, such as those discussed above, rather than from growth in occupied Class C office space. Office occupancy trends were determined based on the annual office occupancy survey of over 80 CBD properties conducted by JR Militello Realty and from other public records. Trends for central business district buildings were separated from larger survey districts and were reviewed by Access & Infrastructure Committee members. The recommended annual trends are as follows:

- Conservative – 0.33% - which is equal to the combined A and B office occupancy trend over the last 10 years including the recession years and the vacancy of Seneca One Tower.
- Moderate – 2% - which is equal to the annual growth in occupied A and B office space since 2013 when Seneca One Tower became vacant.
- Aggressive – 3% - a 1% increase over recent trends

Chart: Office Occupancy Trend over time.



The conservative, moderate and aggressive trends were applied to existing office space until each building reached 85% occupancy, the level determined in previous studies to be essentially full. Once again, occupied space was reported for each downtown block, and then parking demand was calculated by applying the parking demand land use factor for office space.

The impact of office occupancy trends on parking demand is described in the following

Table: Office Absorption Impact on Parking Surplus/Deficit

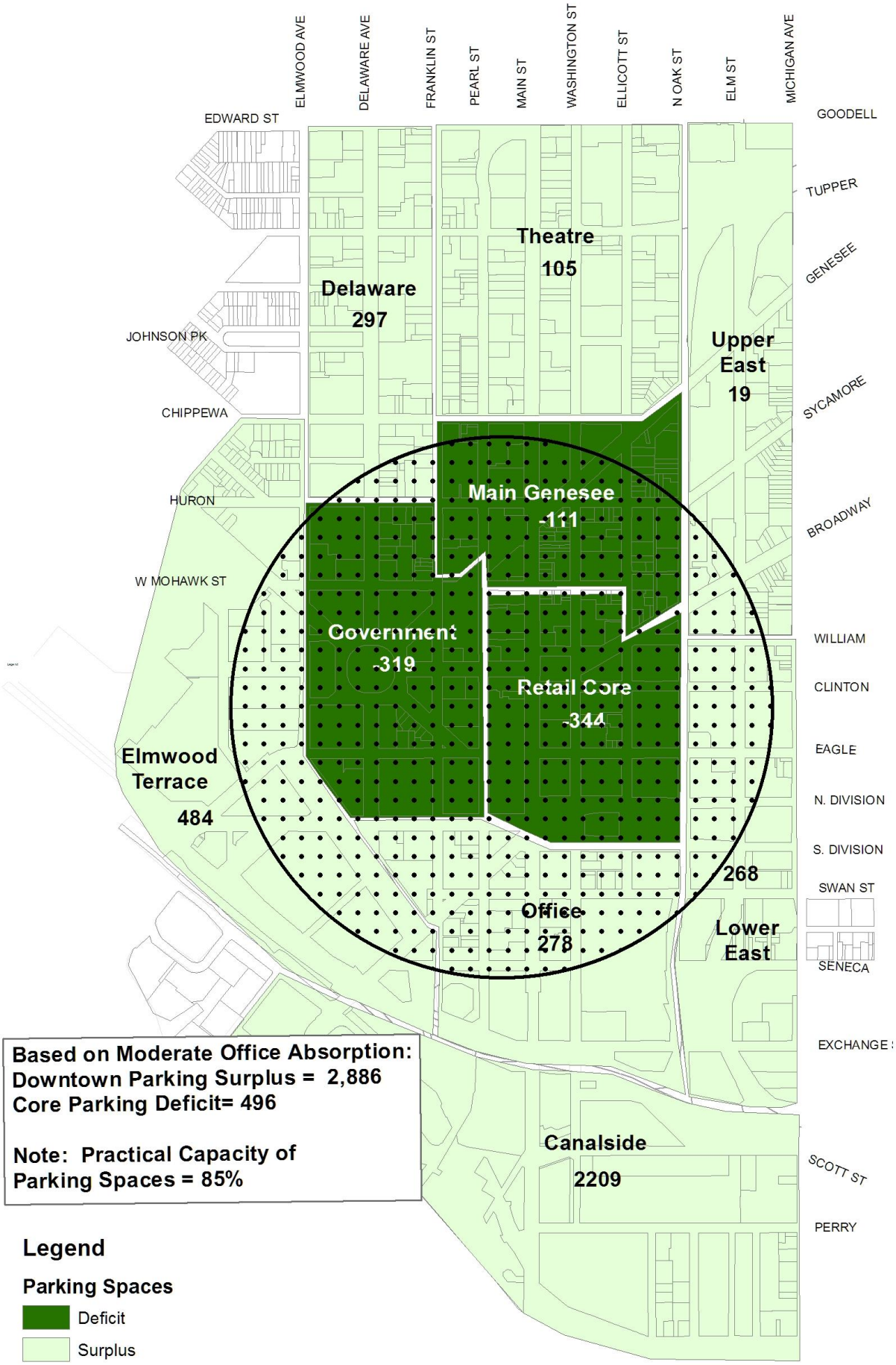
Category	Assumption	Building Square Footage	Calculated # Parking Spaces Needed to Support Office Use
Total Downtown Building Supply	Total Study Area Building Square Footage	28,015,525	
	Total Study Area Occupied Square Footage	22,262,608	
	Total Study Area Vacant Building Square Footage	5,752,917	
	Percent Vacant Building in Study Area = 21%		
	If 100% of Vacant Building Space in Study Area is Filled with Office		11,046
	If Goal of 85% Occupied Space is Met in Study Area (adding 6% Occupancy)	1,680,932	3,227
	If 0.33% Conservative Office Absorption Over Five Years	94,923	182
	If 2% Moderate Office Absorption Over Five Years	575,292	1,105
	If 3% Aggressive Office Absorption Over Five Years	862,938	1,657
Class A & B Office Supply	Total Class A & B Office Supply	8,587,459	
	Total Occupied A & B Office Supply	6,793,938	
	Total Vacant A & B Office Supply	1,793,521	
	Percent Vacant A & B Office Supply = 21%		
	If 100% of A & B Office Supply is Filled With Office		3,444
	If Goal of 85% A & B Office Space is Met (adding 6% Occupancy)	515,248	989
	If 0.33% Conservative Office Absorption in A & B Space is Met	29,593	57
	If 2% Moderate Office Absorption in A & B Space is Met	179,352	344
	If 3% Aggressive Office Absorption in A & B Space is Met	269,028	517

Table: Surplus/Deficit with Conservative Office Absorption [1]

District	District Name	Publicly Available Parking Supply	Practical Capacity	Peak Occupancy	Existing Surplus Deficit	Development Impact	Conservative Office Absorption	Conservative Surplus Deficit
1	Delaware	1192	1013	669	344	-46	-1	297
2	Theater	1225	1041	846	195	-89	-1	105
3	Upper East	554	471	446	25	-5	-1	19
4	Main Genesee	3180	2703	2774	-71	-37	-3	-111
5	Elmwood Terrace	2289	1946	1462	484	0	0	484
6	Government	2707	2301	2272	29	-347	-1	-319
7	Retail Core	3549	3017	3238	-221	-117	-6	-344
8	Lower East	965	820	488	332	-64	0	268
9	Office	3047	2590	1766	824	-529	-17	278
10	Canalside	4169	3544	1048	2496	-286	-1	2209
	Total	22877	19445	15009	4436	-1520	-31	2885

[1] Highlighted rows indicate districts considered full because parked vehicles exceed practical capacity

2016 Surplus/Deficit per District with Calculated Future Development and Moderate (2%) Office Absorption



June 6, 2017

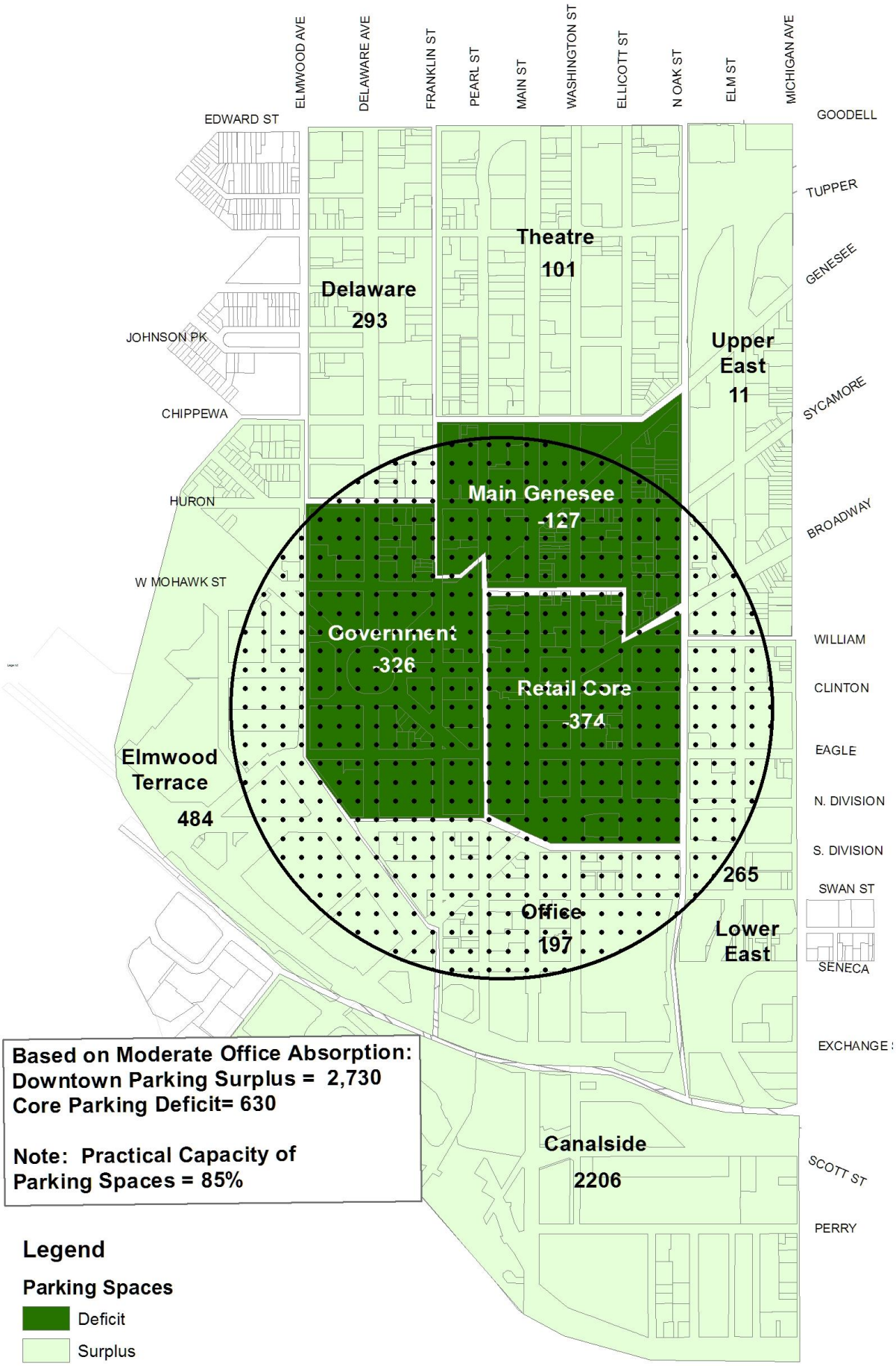
AK-DC

Table: Surplus/Deficit with Moderate Office Absorption [1]

District	District Name	Publicly Available Parking Supply	Practical Capacity	Peak Occupancy	Existing Surplus Deficit	Development Impact	Moderate Office Absorption	Moderate Surplus Deficit
1	Delaware	1192	1013	669	344	-46	-5	293
2	Theater	1225	1041	846	195	-89	-5	101
3	Upper East	554	471	446	25	-5	-9	11
4	Main Genesee	3180	2703	2774	-71	-37	-19	-127
5	Elmwood Terrace	2289	1946	1462	484	0	0	484
6	Governme nt	2707	2301	2272	29	-347	-8	-326
7	Retail Core	3549	3017	3238	-221	-117	-36	-374
8	Lower East	965	820	488	332	-64	-3	265
9	Office	3047	2590	1766	824	-529	-98	197
10	Canalside	4169	3544	1048	2496	-286	-4	2206
	Total	**22877**	**19445**	**15009**	**4436**	**-1520**	**-187**	**2729**

[1] Highlighted rows indicate districts considered full because parked vehicles exceed practical capacity

2016 Surplus/Deficit per District with Calculated Future Development and Moderate (2%) Office Absorption



June 6, 2017

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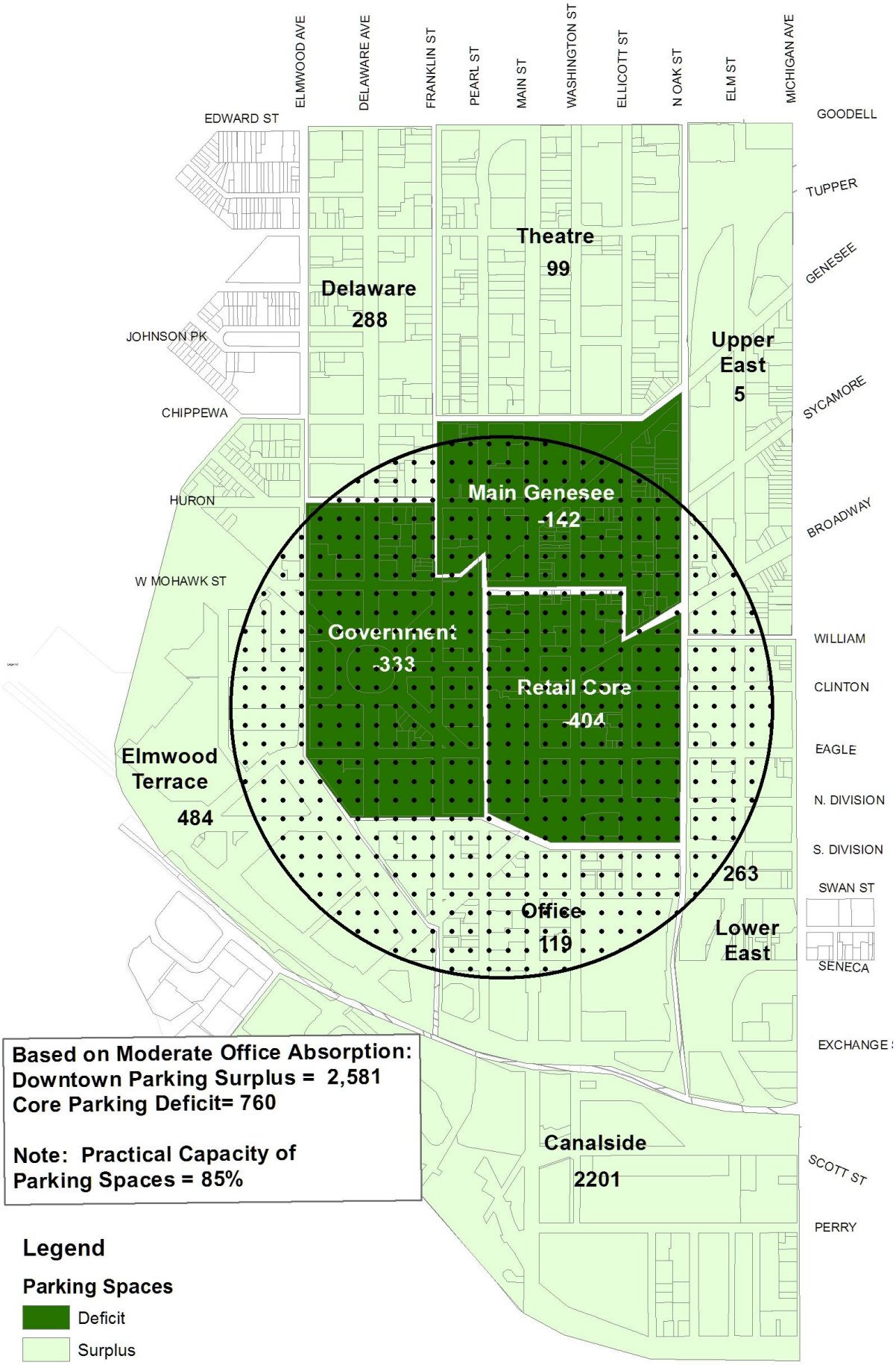
Table: Surplus/Deficit with Aggressive Office Absorption 1

District	District Name	Publicly Available Parking Supply	Practical Capacity	Peak Occupancy	Existing Surplus Deficit	Developmen t Impact	Aggressive Office Absorption	Aggressive Surplus Deficit
1	Delaware	1192	1013	669	344	-46	-10	288
2	Theater	1225	1041	846	195	-89	-7	99
3	Upper East	554	471	446	25	-5	-15	5
4	Main Genesee	3180	2703	2774	-71	-37	-34	-142
5	Elmwood Terrace	2289	1946	1462	484	0	0	484
6	Government	2707	2301	2272	29	-347	-15	-333
7	Retail Core	3549	3017	3238	-221	-117	-66	-404
8	Lower East	965	820	488	332	-64	-5	263
9	Office	3047	2590	1766	824	-529	-176	119
10	Canalside	4169	3544	1048	2496	-286	-8	2202
	Total	**22877**	**19445**	**15009**	**4436**	**-1520**	**-336**	**2580**

[1] Highlighted rows indicate districts considered full because parked vehicles exceed practical capacity

2016 Surplus/Deficit per District with Calculated Future Development and Moderate (2%) Office Absorption



June 6, 2017

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Parking Rates

On Street Parking Rates:

On Street parking in the study area is $1/hour for the majority of metered spaces (1,349 spaces). An additional 342 curb spaces are metered at $2/day in areas where turnover is not needed. Newly created all day spaces on Chippewa Street and a few other locations adjacent to off-street parking facilities are metered at $3/day. An additional 804 curb spaces are free, in the periphery of Downtown, where generally, the volume of parked cars is low and revenue from meters would not cover the cost to install and maintain a meter. The remaining 286 curb spaces are government restricted.

Parking before 9am and after 5pm is free on most Downtown streets, with the exception of Erie Street, Pearl Street and Perry Boulevard near Canalside, where parking is metered until 9pm Monday-Fridays in an effort to provide more event parking.

Off Street Parking Rates:

There are 85 publicly available parking facilities within the Downtown Buffalo Study Area, with 41 in the Downtown Core. Parking is available on an hourly, daily or monthly basis with additional evening, weekend, and event rates. The following table shows the number of facilities and type of parking rates for the facilities.

Table: Number of Facilities Offering Hourly, Daily and Monthly Parking

Parking Rate	Number of Facilities Downtown	Number of Facilities in Core
Hourly	42	31
Daily	71	37
Monthly	75	34

Hourly parking facility rates in Downtown and within the Downtown Core range from $1.75 an hour to $10 an hour. Day parking rates Downtown rage from $2 a day to $20 a day. Within the Downtown Core, the range is from $5 a day to $15 a day. Monthly parking rates downtown range from $20 a month to $225 a month. Within the Downtown Core, monthly rates range from $60 a month to $225 a month.

Parking rates are higher within the Downtown Core. The table on the next page shows the average rate per facility, and the average rate per occupied space to control for the varying size of parking facilities. In general, the average size of parking facilities is higher within the core, due to the core being the location of the BCAR ramps. The table also compares the number of hours or days it takes to cover the daily or monthly rates. This measure indicates when rates for a specific parking duration have increased proportionately more than the rates for other duration.

The number of hours of parking needed to reach the daily maximum rate has decreased by one hour in the last ten years and now averages between 2 and 4 hours to reach the daily rate. When averaging the number of hours by the number of facilities it only takes 2 hours to pay for a day of parking in the core area – an indication of how hourly rates have increased more than daily rates. Within the whole downtown area, it takes 2.8 hours to pay for a day. If the hourly rates are averaged by the number of occupied spaces, in an effort to equalize this calculation between small and large facilities, daily maximum rates are reached within 3.4 hours in the whole study area, and in 3.8 hours within the Downtown Core. The number of hours to pay for a day is mitigated by longer durations required to pay for a day at the larger BCAR and private ramp parking facilities, where it generally takes 3.75 – 5 hours to reach the daily maximum rate. The low number of hours required to pay for the day in off-street facilities is likely the reason so many medium duration parkers (3-5 hours) choose to feed parking

meters rather than to find an off-street parking space. This issue is a problem which should be on our list for recommending solutions to improve overall downtown access.

The average of 13.4 daily parking fees to pay for a month of parking is essentially the same as in 2007 when this calculation was also reviewed.

Table: Parking Rates - Hourly, Daily and Monthly Rates

Parking Rate	Downtown Average Rate Per Facility	Core Average Rate Per Facility	Downtown Average Rate Per Occupied Space	Core Rate Per Occupied Space
Hourly	$4.34	$4.38	$2.92	$2.86
Daily	$7.58	$8.99	$7.60	$8.15
Monthly	$91.28	$109.06	$87.96	$90.67
# Hours Pay for a Day	2.8	2	3.4	3.8
# Days pay for a Month	13.4	12.7	11.9	11.4

Occupancy rates across Downtown are highest within facilities that offer hourly parking. Within the Downtown Core, occupancy for all three types of parking is high with 85% occupancy for each type of parking duration. (85% full is the occupancy rate where parkers perceive facilities as full since they must circle around to find an available space.) This could be contributing to the perception of "there's nowhere to park Downtown". The following table shows occupancy rates for the different duration parking rates.

Table: Parking Availability - Hourly, Daily and Monthly

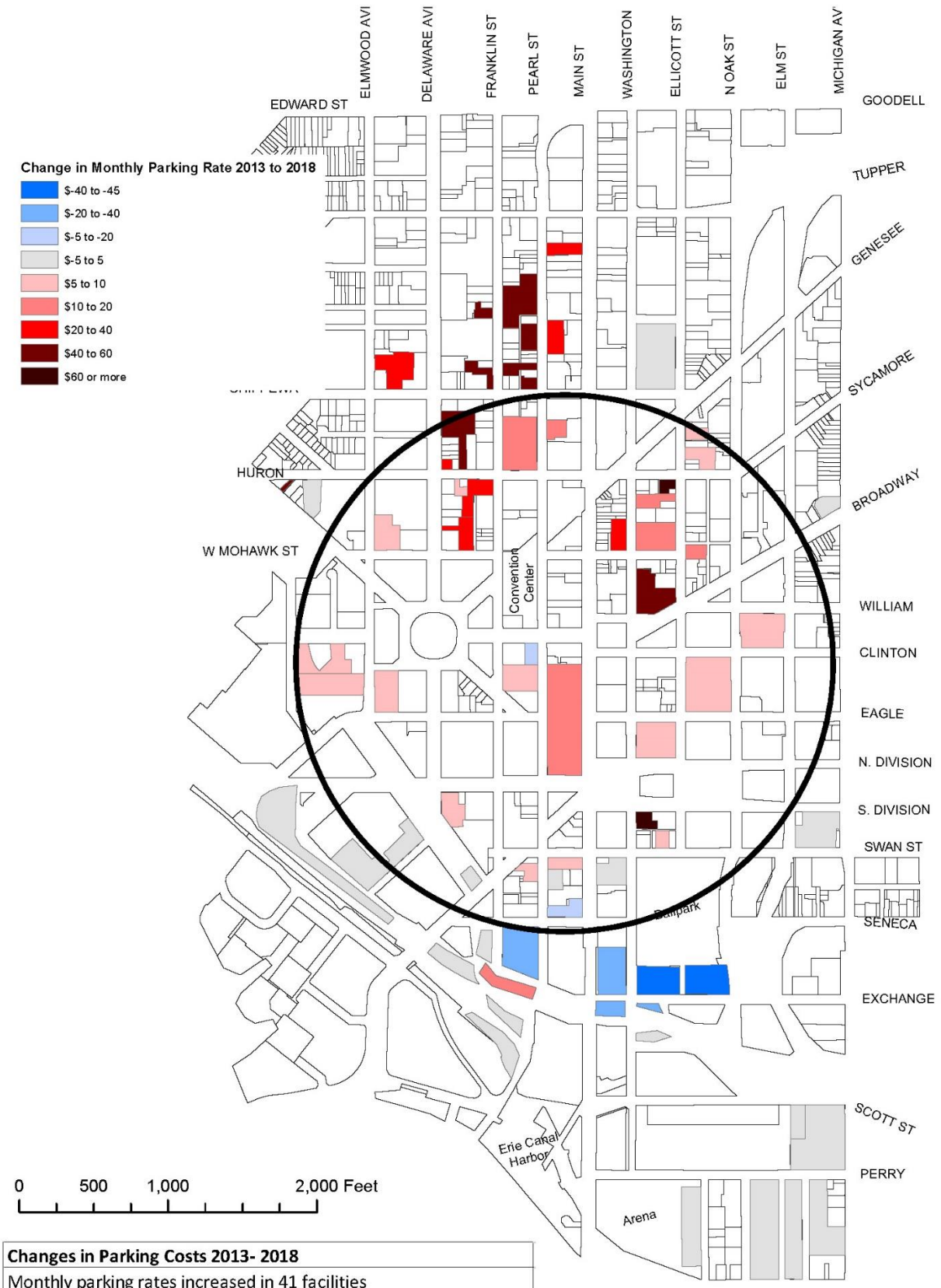
Parking Rate	Downtown Occupancy	Core Occupancy
Hourly	84% (High)	85% (High)
Daily	67% (Medium)	85% (High)
Monthly	69% (Medium)	85% (High)

Change in Off-Street Parking Rates 2013 – 2018

Downtown parking rates have increased over the last five years, with the exception of the few facilities near Seneca One Tower. Monthly rate increases occurred at 41 facilities by an average of $5 per year. Rates were unchanged at 13 facilities and rates near Seneca One Tower fell by an average of $31 per month at 8 facilities. See the *Map: 2013 to 2018 Change in Monthly Parking Rate* that follows.

Hourly parking rates increased at 18 facilities by an average of $1.79 per hour. Rates remained the same at five facilities and they declined by $1 or $2 per hour at two facilities near Seneca One Tower. See the *Map: 2013 to 2018 Change in Hourly Parking Rate* which follows.

2013 to 2018 Change in Monthly Parking Rate



Changes in Parking Costs 2013- 2018
Monthly parking rates increased in 41 facilities
Increase in monthly prices ranges from $0.75 to $100
The average monthly price increase per facility is $25.50 ($5/year)
Monthly parking rate remained stable at 13 facilities
Monthly parking rates decreased in 8 facilities (near Seneca One)
Decrease in monthly prices range from $5 to $45
Average facility decrease is $30.96
Average overall change in monthly rate is an increase of $16.61

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November 6, 2018

2013 to 2018 Change in Hourly Parking Rate

Changes in Parking Costs 2013 - 2018
Hourly parking rates increased in 18 facilities
Increases in hourly prices ranged from $0.50 to $8
Average hourly price increase per facility is $1.79
Hourly parking rates remained stable at 5 facilities
Decreases in hourly parking rates in two facilities
Decrease in hourly prices ranged from $1 to $2
Average overall change in hourly rate is an increase of $1.19

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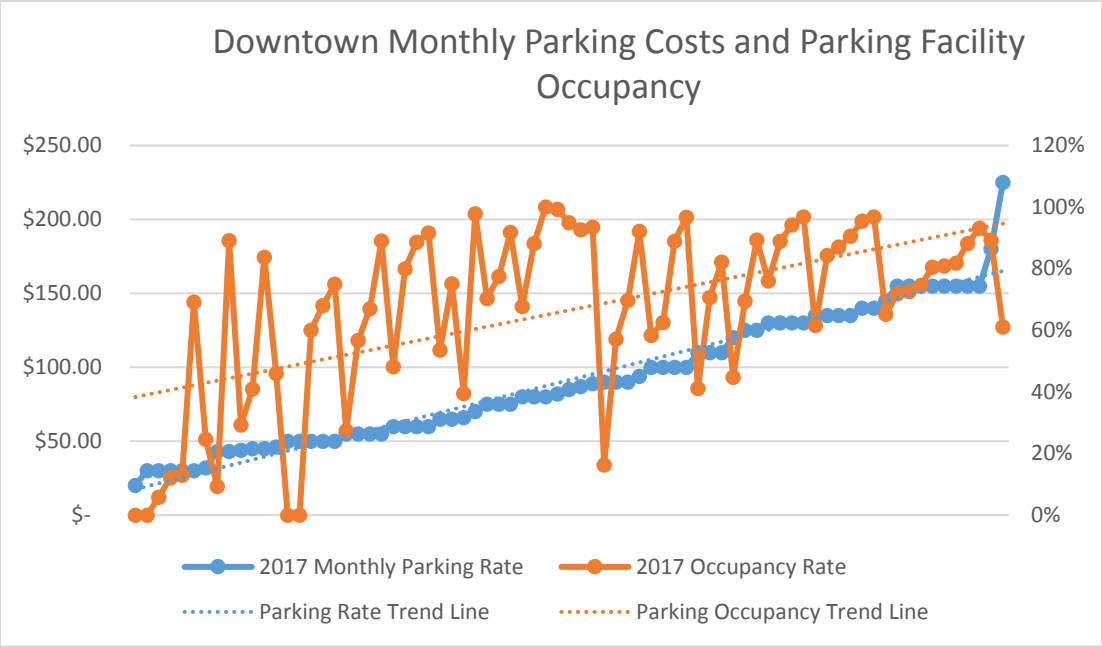
When comparing monthly cost and occupancy, cost appears to increase when occupancy increases. There is a positive correlation coefficient of r=0.50, with a statistical significance at p<0.05. The following *Chart: Downtown Monthly Parking Costs and Parking Facility Occupancy* tracks parking costs and parking occupancy.

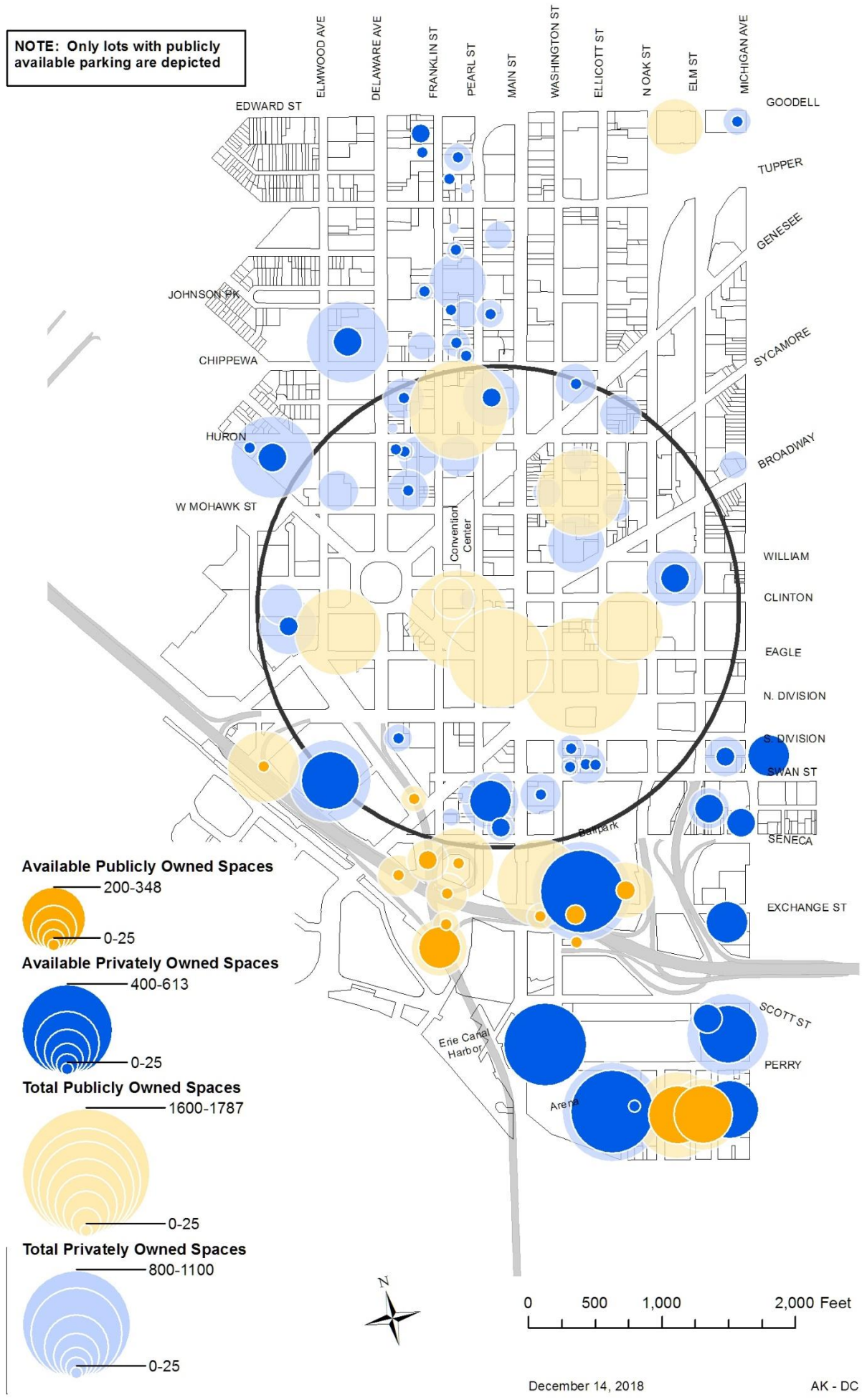


Within the Downtown Core, there is a slight negative correlation, where occupancy decreases when cost increases. However, this is also a weak relationship and not a statistically significant result.

As restricted privately owned parking has grown, it has influenced the quantity of publicly available parking in Downtown, in both publicly and privately owned facilities. Within privately owned facilities, there is a surplus of 3,389 spaces downtown wide. Within the core, the surplus in publicly available spaces that are privately owned facilities drops to only 275 spaces. In publicly owned facilities, there is a surplus of only 188 spaces publicly available downtown wide. In the core, publicly available parking within publicly owned facilities is at a deficit of 646 spaces.

The following *Map: 2018 Spaces Available in Privately Owned vs Publicly Owned Facilities* depicts the lack of publicly available parking in both the Downtown Core and in the northern part of Downtown. Privately owned parking is less readily available for downtown monthly parkers, as the parking fees in those facilities are higher, facilities are often subject to reduced availability or higher peak-pricing adjustments during special events, and the hours when public parking is available may be limited, further restraining access for those with off-peak work schedules.

2018 Spaces Available in Privately Owned Vs Publicly Owned Facilities



December 14, 2018

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Combined Parking Supply Findings:

- While there is a surplus of parking spaces in Downtown as a whole, spaces are not available close enough to demand in current Downtown Core districts, especially the historic Retail Core.
- The Downtown core area including the historic Retail Core, Government, Main Genesee and Office districts, has 38% of downtown's parking spaces but contains 65% of Downtown's employees.
- Thousands of core parkers now walk to periphery parking, especially from the Government District.
- The Office district contains the core-parking surplus with 838 surplus spaces of the net 808 Downtown Core surplus. At the time of the on and off-street parking surveys in 2016, six of the Office District building were in transition to new uses and were under construction.
- The development projects expected to occur over the next five years, combined with conservative office expansion following the 10-year trend, will put the Downtown Core into a 500-car deficit.
- The Core deficit expands to 630 and 760 if office growth is moderate or more aggressive
- Downtown employers and developers report that tenants and employers must know that there is some available parking nearby before they will commit to sign a lease or move employees Downtown.
- Other access solutions can help and should be aggressively pursued. GBNRTC and Go Buffalo Niagara are able to work with employers and landlords to identify and implement solutions
- Publicly managed, shared parking is the most efficient parking option. Private restricted facilities are less intensively used. If our goal is to minimize the amount of space dedicated to parking yet to provide sufficient supply to support occupancy of vacant buildings, then publicly managed, shared parking should be the preferred alternative.
- Structured parking is a much more efficient use of Downtown land to supply the parking spaces necessary for vacant buildings to become occupied. 37% of current Downtown parking spaces are in ramps and garages, but they only take up 4% of the Downtown footprint and 13% of the total parking supply footprint.
- It is time to look at replacing some existing surface parking lots with more efficient structured parking. This will allow the supply of parking to increase while also freeing up new land areas available for development. Developers have noted that the supply of available building stock is diminishing, creating pressure, finally, for conversion of parking lots to development projects. The recent Housing report by The Partnership advocates for use of surface parking lots as development sites.
- Green Code requirements for active uses at the street level of structured parking facilities have a positive effect on street life over existing open parking lots.
- There are other city models where a separate company manages surplus private parking spaces for owners, and makes them available to the general public.
- Moderate pricing changes should be considered as an option to promote helpful access behavior changes, e.g. preserving short term curb parking for short duration visits to Downtown; use of satellite parking facilities; converting parkers to transit; and encouraging carpooling, bicycling and walking. Increased fees may be more acceptable to the public if they are dedicated to a fund that will reduce the cost of less convenient access options with the purpose of freeing up priority core parking spaces needed to achieve increased building occupancy.
- Curb parking rate changes should be selected to support high occupancy of curb parking spaces while still leaving some spaces available for short duration parkers to cycle through. Rates that are perceived as too high will result in fewer parked cars, lower revenues and increased demand for expensive and difficult to provide off-street parking. When spaces do not generate enough income to cover meter and maintenance expenses, put them to work for downtown by allowing free parking.
- Moderate Off-Street parking fee increases should be phased in over time so that employee dissatisfaction does not result in tenants relocating to available suburban space. Increased building vacancy is followed by reduced assessed values and lower property tax generation.

Transit

Transit Supply and Utilization

NFTA Routes:

Downtown is well served by transit, with 39 routes running through the downtown study area. This is 61 percent of NFTA's 64 system-wide routes. Nineteen of the routes run on a local schedule, and fourteen run express service. Local routes run throughout the entire service day; express routes generally make a few runs during morning commute and a few during evening commute. Four of the downtown routes are seasonal running on school days only. Metro Rail runs aboveground on Main Street Downtown, within a free fare zone. Metro Rail stops within the study area include Fountain Plaza (between Chippewa and Huron), Lafayette Square (between Mohawk and Lafayette Square/Court), Church Street, Seneca Street, and Erie Canal Harbor (between Exchange/Upper Terrace and Scott). The Special Events station is only open during events at the arena/Canalside area, which are typically outside of the normal weekday timeframe of this study.

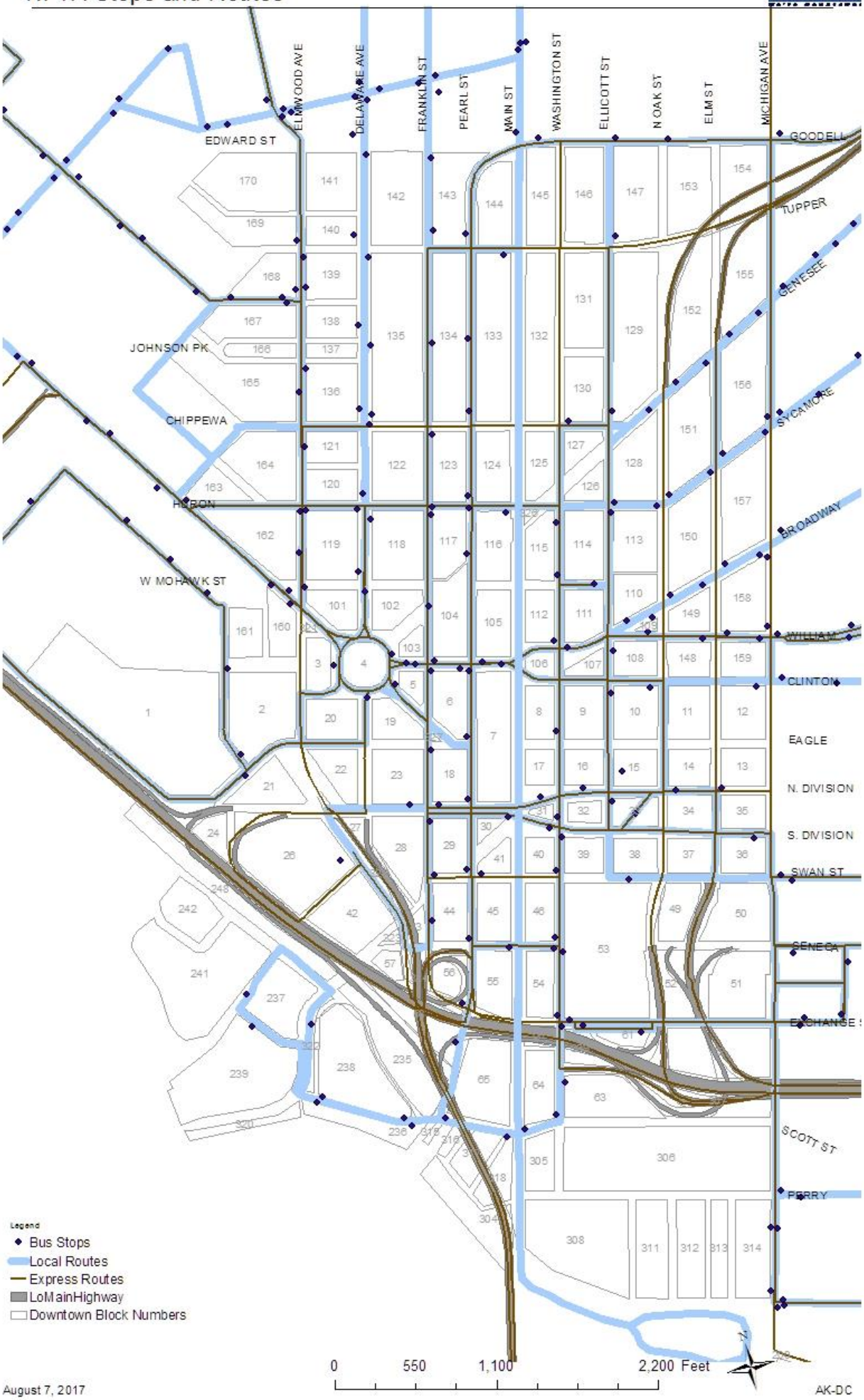
Below is a *List: NFTA Routes Within Downtown Buffalo*.

Service Type	Routes
Local	1 - William
	2 - Clinton
	3 - Grant
	4 - Broadway
	5 – Niagara-Kenmore
	6 – Sycamore
	7 – Baynes-Richmond
	8 - Main
	11 – Colvin
	13 – Kensington
	14 - Abbott
	15 – Seneca
	16 – South Park
	19 – Bailey
	20 - Elmwood
	24 – Porter-Best
	25 – Delaware
	36 – Hamburg
	40 – Buffalo/Niagara Falls

Service Type	Routes
Express	60 – Niagara Falls Express
	61 – North Tonawanda
	64 – Lockport Express
	66 - Williamsville
	67 – Cleveland Hill
	68 – George Urban
	69 - Alden
	70 – East Aurora
	72 – Orchard Park
	74 - Hamburg
	75 – West Seneca
	76 – Lotus Bay
	79 – Tonawanda
	81 – Eastside
	204 – Airport Express
Seasonal School Service	101 – North-South
	102 – Bailey-East
	106 – South-Suburban
	111 – South-Michigan
Metro Rail	145 – Metro Rail

Map: NFTA Stops and Routes follows on the next page.

NFTA Stops and Routes



August 7, 2017

AK-DC

Table: Bus Stops:

Downtown is also well served by bus stops, with 165 within the downtown study area. The following table lists the number of bus stops per district.

District	Number of Stops
Delaware	18
Theater	13
Upper East	21
Elmwood/Terrace	9
Main/Genesee	15
Government	22
Retail Core	17
Office	19
Lower East	11
Canalside	20

NFTA Fares:

To ride the bus, individual fare and day passes can be purchased when boarding the bus. Exact fare is required as operators are unable to make change. Ticket vending machines are also available at all Metro Rail Stations, the Metropolitan Transportation Center (MTC – 181 Ellicott Street), Portage Road Transportation Center and Niagara Falls Transportation Center. The machines accept Metro tokens and cash only. Purchase of standard fare, day passes, weekly passes or a 30-day pass is available at the ticket vending machines. Monthly passes can also be purchased online or at Tops, Dash's Market and Parkside Pharmacy. Reduced fares (50% off) are available for children 5-11, seniors 65 and older, disabled and Medicare users.

Table: NFTA Fares

Type of Fare	Fare Cost
Standard Fare	$2
Day Pass	$5
7 Day Pass	$25
30 Day Pass	$75
Monthly Pass	$75

Bus Ridership:

NFTA measures the number of arrivals and departures at each bus stop. Based on July 2017 numbers, 10,012 people arrive Downtown by bus each day by bus. Arrivals range from 0 to 822 people per bus stop per day. Daily bus departures total 9,962 people, with departures ranging from 0 to 921 people per bus stop per day. These bus riders include all users including students with annual bus passes, and riders with monthly or 30 Day, 7 Day, Day or standard fare single trip passes.

Metro Rail Ridership:

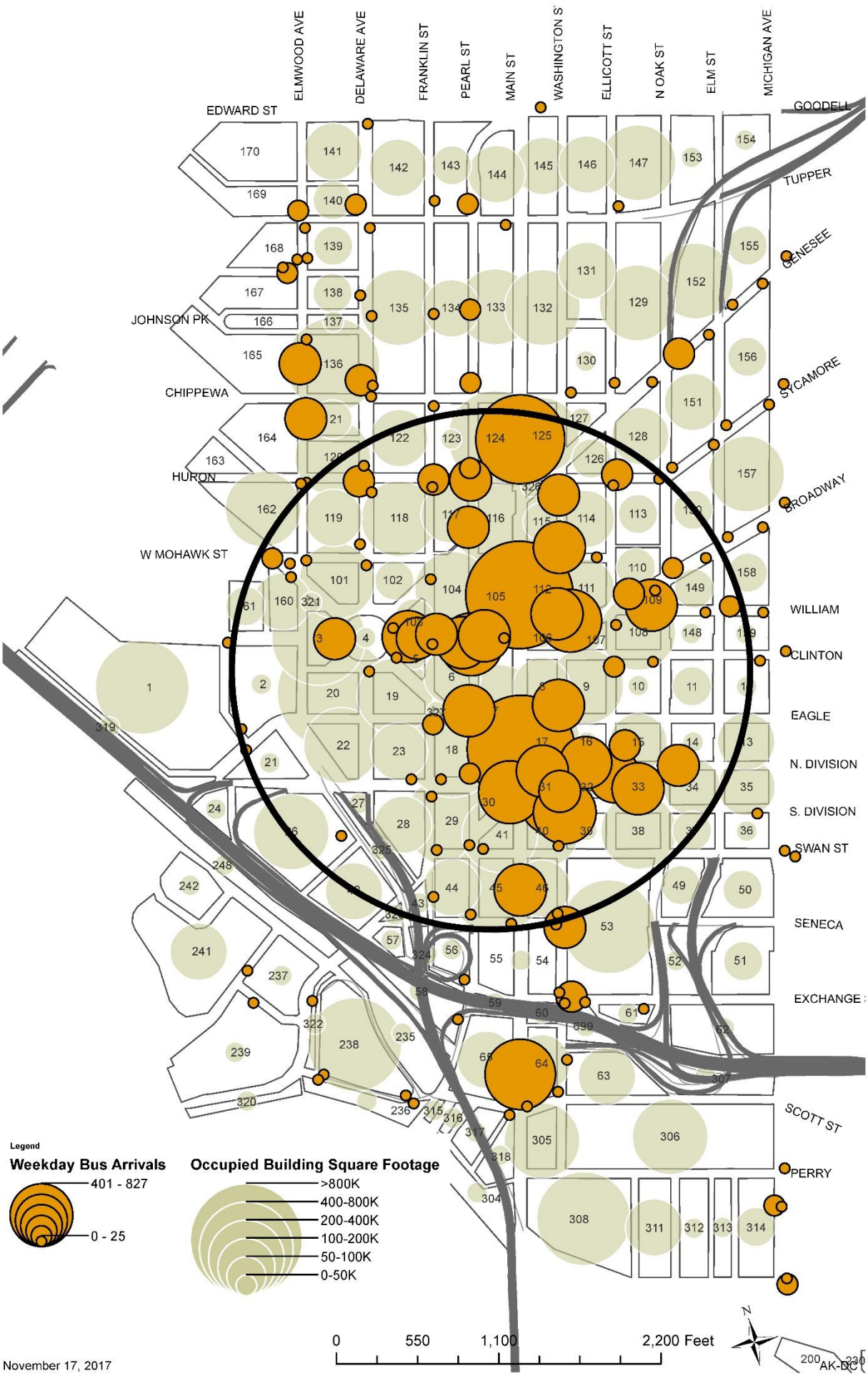
NFTA measures the number of arrivals and departures at each metro rail stop. Based on July 2017 numbers, 6,266 people arrive by metro rail each day, once again including the full variety of pass types. Departures via metro rail total 6,103 people daily. Church Street and Lafayette Square stations are the most used station within the downtown study area, which are both located with the Downtown Core area. Additionally, Church Street station is the second most used station within the Metro Rail system as a whole, second only to University Station, the first station on the northern end of the route.

*T*able: Metro Rail Ridership

Station	**Arrivals**	**Departures**
Fountain Plaza	1,549	1,421
Lafayette Square	1,703	1,811
Church Street	1,980	1,982
Seneca Street	385	3,68
Erie Canal Harbor	649	521
Total	**6,266**	**6,103**

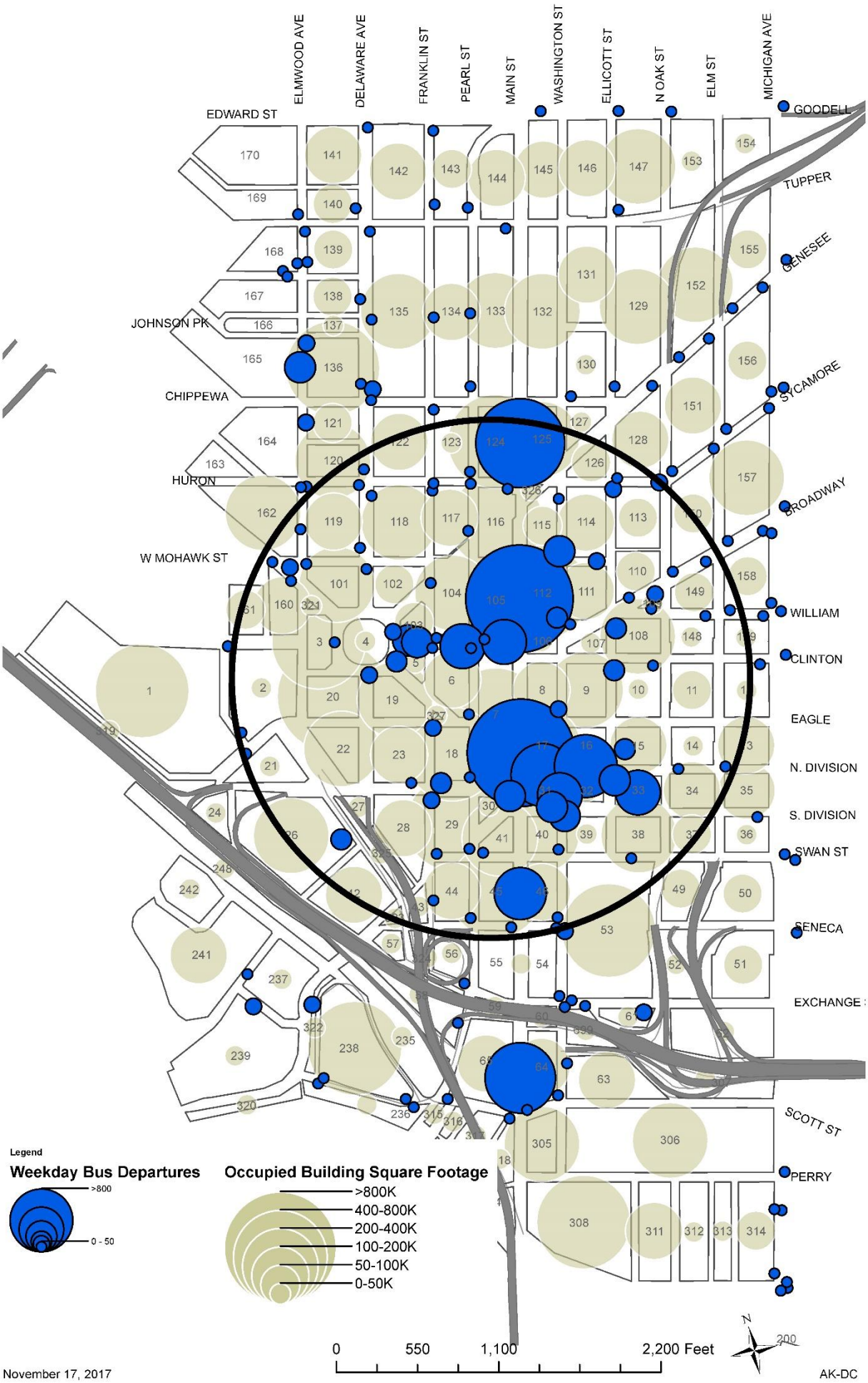
The following *Maps: Number of Arrivals and Departures by Bus and Rail Per Stop*. As shown on the maps, ridership is concentrated within the Downtown Core area.

Weekday Bus and Metro Train Arrivals to Downtown and Occupied Building Square Footage



November 17, 2017

Weekday Bus and Metro Rail Departures from Downtown and Occupied Building Square Footage



November 17, 2017

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NFTA Plans for Service Improvements 2018 - 2020

1. NFTA plans to implement the recommendations of the 2016-7 region wide bus route study in 2018 and 2019. This will include:
    - Streamlining downtown bus routes to increase efficiency and reduce travel time through Downtown.
    - Streamline express route downtown stops to reduce bus travel times and simplify the complicated system.
    - Increase bus frequency on high volume bus routes (goal of every 10 minutes)
    - Provide patron amenities at more centralized stops - seating and perhaps shelters
2. A new fare system is in development and will include establishment of commuter accounts and personal fare cards. The new system will allow credit card purchases at fare machines to refill fare cards, and will allow automatic upgrades to daily, weekly and 30-day pass rates if used frequently enough to be eligible for that fare category. The new system will resolve issues preventing users from easily purchasing transit passes with pretax flex benefit cards at fare machines or online. Employers will be able to offer pretax transit as a flex benefit the same way that health and parking flex benefits are now offered to employees, often with use of a dedicated debit or credit card.

    The fare system must be securely and carefully designed, and it involves new procedures at every NFTA point of sale. Testing and implementation will take some time to complete. The new system will likely be tested in late 2019 and will be available to assist employees wishing to obtain transit pre-tax flex benefits and Corporate Pass transit rates later in 2020.

Capital Projects Underway

1. DL&W Rail Station project – NFTA has been awarded $36 million from New York State for extension of Metro Rail along South Park Avenue to a new station on the Riverwalk side of the DL & W Train Shed. The entire project is estimated to cost $46 million to extend the rail, build out a station inside the DL&W and link to KeyBank arena. NFTA is seeking additional grant funds to complete project funding, most notably a BUILD Discretionary Grant from Federal DOT. NFTA is interested in private sector participation to link the new station directly to KeyBank Arena.

    This project includes rail yard reconfiguration, and a new rail crossover in the yard to replace the crossover on Main between Exchange and Scott Streets. Rail-yard reconfiguration and the procurement of the track and switches has been bid. It will take one year for fabrication and delivery of parts. The DL&W Station is 70% designed. Construction preparation work will begin between fall of 2019 and spring of 2020, and the station and crossover will be complete in fall of 2021.
2. Transit Car Rebuild - $40 million “mid-life rebuild” program aiming to keep the 27-car Metro Rail fleet on the tracks for years to come. This project has been underway for several years and 21 of the Metro Rail cars have been completed. The remaining six cars are at the Dansville rebuild facility and are expected to be complete, tested and accepted by 2021.
3. Capital Repair of Metro Rail – After 34 years of operation, much of the Metro Rail system is in need of capital reconstruction, including replacement of rail, the catenary power system, train control and communication systems, station escalators and elevators. The Cars Sharing Main Street project includes rebuilding many of these facilities in the LRRT surface section, but

underground sections also are being renewed. This project became active several years ago and is steadily progressing with most parts on the schedule for full completion:

- The underground Metro Station escalator rebuild/ replacement project has been underway for three years. Allen, Delavan and Amherst Stations have been completed. LaSalle and Utica Stations are now underway. They and the Humboldt and Summer/Best stations will be completed in the next two years.
- Underground station elevators are being rebuilt; University and Amherst have been completed and the other stations will be done over the next four years.
- Underground catenary replacement is underway. One quarter has been completed, with the most critical sections to be completed in the next two years. Remaining sections showing less wear will be scheduled over the longer term.
- Underground train control replacement will begin following completion of the Lower Main Street project in 2022.
- Underground rail replacement is a long-range project. The outbound rail is underway with sections scheduled in alternate years. The inbound rail will be addressed in the next decade, also with new sections scheduled in alternate years.
- Rail, trackbed, catenary, train control and communication system updates in the Metro Rail surface section are being completed as part of the Cars Sharing Main Street project. Theatre and Fountain Plaza are completed and Lower Main Street is underway. Interim station repair has been completed at Canalside, Lafayette and Church stations and at Seneca inbound. Seneca outbound is scheduled for 2019, coordinating with City efforts on the Seneca Station walkway. The Canalside stations will be refurbished and re-dedicated as the "Seneca Creek at Canalside Station" in 2019.
- The City of Buffalo Cars Sharing Lower Main Street project will rebuild the trackbed, rail, communication, catenary and train control equipment as well as redo Main Street sidewalks and streetscape between Exchange and Scott Streets, in coordination with the new Metro Rail crossover in the DL&W rail yard. This project started in summer of 2018 and will be complete in fall of 2022, following completion of the new rail crossover.
- Surface section rail repairs are made as needed until sections are rebuilt as part of the Cars Sharing Main Street project. NFTA estimates 10-20 repairs per year, as the end of life-cycle rail is changed out.

4. Amherst-Buffalo Light Rail Extension $1 billion construction. A $4.8 million contract award has been made to WSP Inc. for the rail extension's environmental studies and preliminary design. Construction is expected in the next decade with completion around 2026.

Feasibility of Transit/Bus Park and Ride Between Employment and Available Periphery Parking

The idea of expanding Downtown park and ride discussed at the Access & Infrastructure meeting on June 7, 2017 was investigated. The committee asked if Metro Rail and Bus could be used to link daytime downtown employees to unused periphery parking.

Parking in the Canalside area at the south of Downtown, near KeyBank Arena, has been discussed and has been used for park and ride. Currently M&T Bank and the Buffalo Sabres are coordinating employee parking in this area. Employees use Metro Rail to travel to their workplace in the Downtown Core. Buffalo Place organized the Park'n Go Shuttle used by some 1,800 downtown employees in the early 2000s. This program started with shuttle buses on Main Street and evolved to use an NFTA Shuttle bus

route and Metro Rail. Both of these programs have established that a group of core employees is willing to park and ride, but they are motivated by price. Fees for park and ride must be in the $20 - $30 per month range to overcome the inconvenience and extra time required to use a satellite parking facility.

Committee members asked if parking on the east side of Downtown could be utilized and if Metro Buses could be used for travel to work, similarly to Metro Rail for the Arena facilities.

Buffalo Place started by mapping parking facilities with unused spaces at the noon, weekday peak-hour. Facilities with over 100 spaces were labeled with the number of open spaces. Bus routes were added to the map and NFTA staff were asked for advice on bus directions, frequency and ridership availability. The *Map: Available Parking & Transit Near Development Potential f*ollows

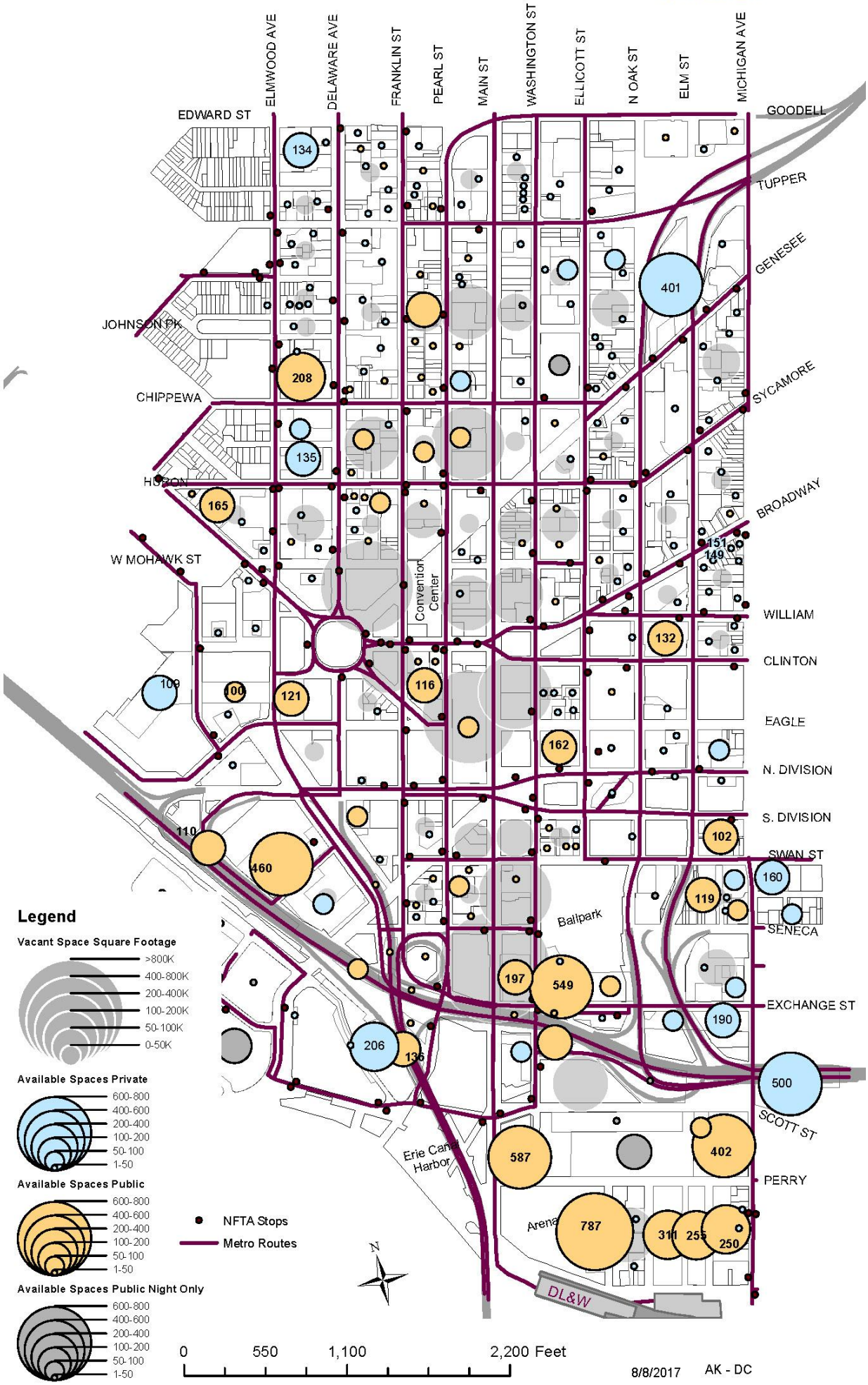
NFTA Metro staff discussed upcoming projects planned to improve Metro Bus service including review of express bus routes Downtown with an intention of simplifying the streets used for bus stops. This would centralize riders and allow NFTA to provide transit amenities such as bus shelters and benches.

In reviewing the map showing the locations of bus routes and surplus parking, there are bus stops near parking to the east of the Downtown Core, but the buses do not travel between those parking facilities and the Downtown Core, they tend to move north south along Michigan and parallel streets. We did not identify a way to bring monthly costs down to the levels needed to encourage use of park and ride. We discussed use of large satellite parking facilities near highway exits, but did not identify feasible options for consideration.

The one opportunity that became obvious is Canalside/KeyBank Arena parking near the DL&W station. Some 2,000 unused parking spaces are within an easy walk to the DL&W station. This site has been selected as a transit station on the extended free fare zone, and has received a funding award from New York State. The cost, parking availability and convenience problems of park and ride can be solved at this site once NFTA is able to extend Metro Rail. NFTA is in the process of securing matching funds for this project.

On May 24, 2018, Access and Infrastructure Committee members asked if shared bicycles could be used for employees to move between underutilized east side of Downtown parking and employment in the core. This idea is being investigated with possible grant funds being requested for placement of ReddyBike racks near an underutilized parking supply

Available Parking & Transit Near Development Potential



8/8/2017 AK - DC

Use of Pre-Tax Transit Benefits and NFTA's Metro Perk Program

IRS regulations allow employees to purchase Metro Passes with pre-tax earnings. This is a cost savings for both employers and employees. Employees can save 10% to 37% of the $75 per month Metro Pass fee, depending on their annual tax rate, bringing real costs for monthly transit passes to the $67.50 to $59 per month range. (The median household income in Western New York of $66,830 would be eligible for a 22% pre-tax savings. Household income would need to be over $164,000 to be eligible for 24% and over $600,000 to be eligible for the full 37% pretax savings.) Employers save payroll expenses, which is often more than a benefits administration company would charge to manage the program.

The IRS also allows pre-tax income to be spent on parking and vanpool commuting expenses. Unfortunately, there are fewer restrictions on how these programs can operate than for transit pre-tax reimbursement. Employees enrolled in pre-tax parking and vanpool-commuting programs can submit cash receipts for reimbursement. Transit passes must be purchased according to several regulations which currently limit utilization in Buffalo and nationally. A large private sector employer in Downtown Buffalo, for example, has experienced a 27% loss, nationally, of pre-tax transit benefit participation since the IRS prohibited use of cash reimbursements in 2016.

IRS requirements for purchase of transit passes with pre-tax income:

- Smartcards may be used by employers to provide employees access to the transit system
    - A Smartcard includes a chip that uniquely identifies the card and its stored value.
    - Can be used either as a Metro Pass or to purchase a Metro Pass (and for no other purpose).
    - NFTA does not yet have smartcard Metro Passes but a new system is being designed. Estimates are that this technology will be available for testing in fall of 2019. They may be up and running in time for employee open enrollment periods in the fall of 2019 benefits, and will certainly be in place for 2020.
- A *Terminal-restricted* Debit Card can be issued to employees that can only be used to purchase transit passes and can only be used at locations where only Metro Passes are sold. The NFTA Transportation center second floor cash office meets this requirement and is the place where current pre-tax debit cardholders are purchasing Metro passes. This restriction precludes use of pre-tax income for purchase of Metro Passes at participating retailers, such as Tops Markets.
- The debit card must also be restricted so that the Metro Pass seller does not have any other merchandise to sell other than transit passes. This is the current problem with use of benefit debit cards for online purchases at NFTA. NFTA uses PayPal to process their on-line credit card purchases, invalidating them under IRS regulations for pre-tax purchases because PayPal can be used for many different vendors and purchases beyond transit passes
- Employers or benefit providers can purchase monthly passes on behalf of employees, pay NFTA directly, and distribute monthly Metro Passes to employees. This is the Metro Perks program. NFTA's enrollment form and monthly order form is attached. This option works well for employers who wish to manage transit benefits in-house, or have a relationship with a benefit provider willing to provide direct purchase of Metro Passes (Wired Commute and Wage Works now do this). This option can be problematic at organizations without sufficient personnel to distribute monthly passes to employees, and is the reasons Erie County has not yet implemented a pre-tax transit benefit to employees. The new fare system being designed will simplify these direct purchases, and make this option more attractive to employers.

Current users of NFTA's Pre-Tax Metro Perk program, where employers purchase Metro Passes and distribute them to employees:

- 88 companies and two flex benefit providers

- 695 Metro Passes purchased monthly in 2017 with pre-tax income (Metro Flex + Benefits)
- For comparison, 12,000 – 13,000 monthly passes are purchased each month.
- Current use of Metro Perk and pretax transit benefits are estimated in the .6% of Monthly passes range

NFTA is currently testing a **Corporate Pass Program** for companies that purchase 25 or more Metro Passes per month:

- The purpose of the program is to increase ridership, utilization of Park and Ride lots, productivity of NFTA's fixed assets, and to create a lower price point for non-traditional commuters
- NFTA offers a bulk-purchase $10 monthly discount per pass, if matched by the employer
- NFTA will allow umbrella organizations to manage this program so that smaller businesses will be eligible to participate. Go BNMC currently does this the Medical Campus area and has 200 participants.
- Companies must enroll in the Metro Perks program for purchase of passes, resulting in employee and employer savings through use of pre-tax income.
- Employee Metro Pass expense is reduced to $49.50 to $34.65 per month, depending on the employee's tax rate. (Median households would pay $42.90. Metro passes could range from $41.80 to $34.65 for incomes over $164,000.)
- The program will be evaluated in December 2018 to consider if it has been effective and if it should continue.

Transit Findings:

1. Assure that the new NFTA fare system allows purchase and reloading of Metro Passes with pre-tax benefit debit cards eligible under IRS guidelines. (Already underway)
2. Retain NFTA Corporate Pass Program for use or testing following implementation of the new fare collection system. Determine if there is a way to offer NFTA the time savings of bulk transit pass purchase from employees at companies whose benefit provider issues individual benefit debit cards. Employers offering transit benefit debit cards may also be willing to contribute to employee monthly transit costs to match NFTA's discount. Could there be a way for them to be eligible for NFTA's corporate purchase $10/month discount? The lower price point will certainly make transit ridership more attractive.
3. Develop and distribute marketing materials to inform employers and employees of how easy and cost effective it can be to offer/use pre-tax transit benefits
4. Identify potential umbrella organizations who might be willing to consolidate Metro Pass purchase and distribution for smaller companies, so they will also be eligible for NFTA's $10 per pass, bulk-purchase discount.
5. A goal for growth in use of Metro Perks and pre-tax transit benefits for Downtown Buffalo might be 1 % of downtown employees. This is based on the experience of a Downtown employer with offices in other regions where transit is more easily purchased with pre-tax income. The number of downtown employees has been calculated to be 55,362. One percent would be 554 people.

Bicycle Travel

Bicycle use for the trip to work is increasing; mode share between 2000 and 2010 increased Citywide from 0.4% of commuters to 1.7%. The City of Buffalo is working to support bike commuting with additional facilities including marked bike lanes (+ 90 miles Citywide as of 2016), bike racks and future priority projects designed to increase safe bicycling options. The Buffalo Bike Master Plan Update, completed in 2016, identifies types of bicycle riders to be encouraged and recommended priority facilities to be built over the next decade. While bicycle commuting is currently a small proportion of the Downtown trip to work, it is growing and can be encouraged with less expense facilities then required by most other options.

Existing Bike Routes and Racks

Within Downtown Buffalo, marked bike lanes can be found on Niagara Street north of Niagara Square, on Delaware Avenue north of Niagara Square, on Pearl Street between Seneca Street and Tupper Street, and on Main Street between Chippewa and Edward/Goodell Streets. West Chippewa Street between Main Street and South Elmwood Avenue is marked with sharrows for shared car and bicycle traffic.

New York State Bicycle Routes 5 & 517 traverse Downtown on Washington Street. Route 5 is an on-road bicycle route that extends 365 miles from Niagara Falls across New York State to the Massachusetts state line. Route 517 is an on-road bicycle route that extends 90 miles from the Pennsylvania State line near Jamestown to the Hamlet of Olcott on Lake Ontario. The Niagara Shoreline Trail runs along the southern edge of Downtown, along the riverfront. The Shoreline Trail is a series of multi-use trails that runs along Lake Erie and the Niagara River within Erie and Niagara Counties.

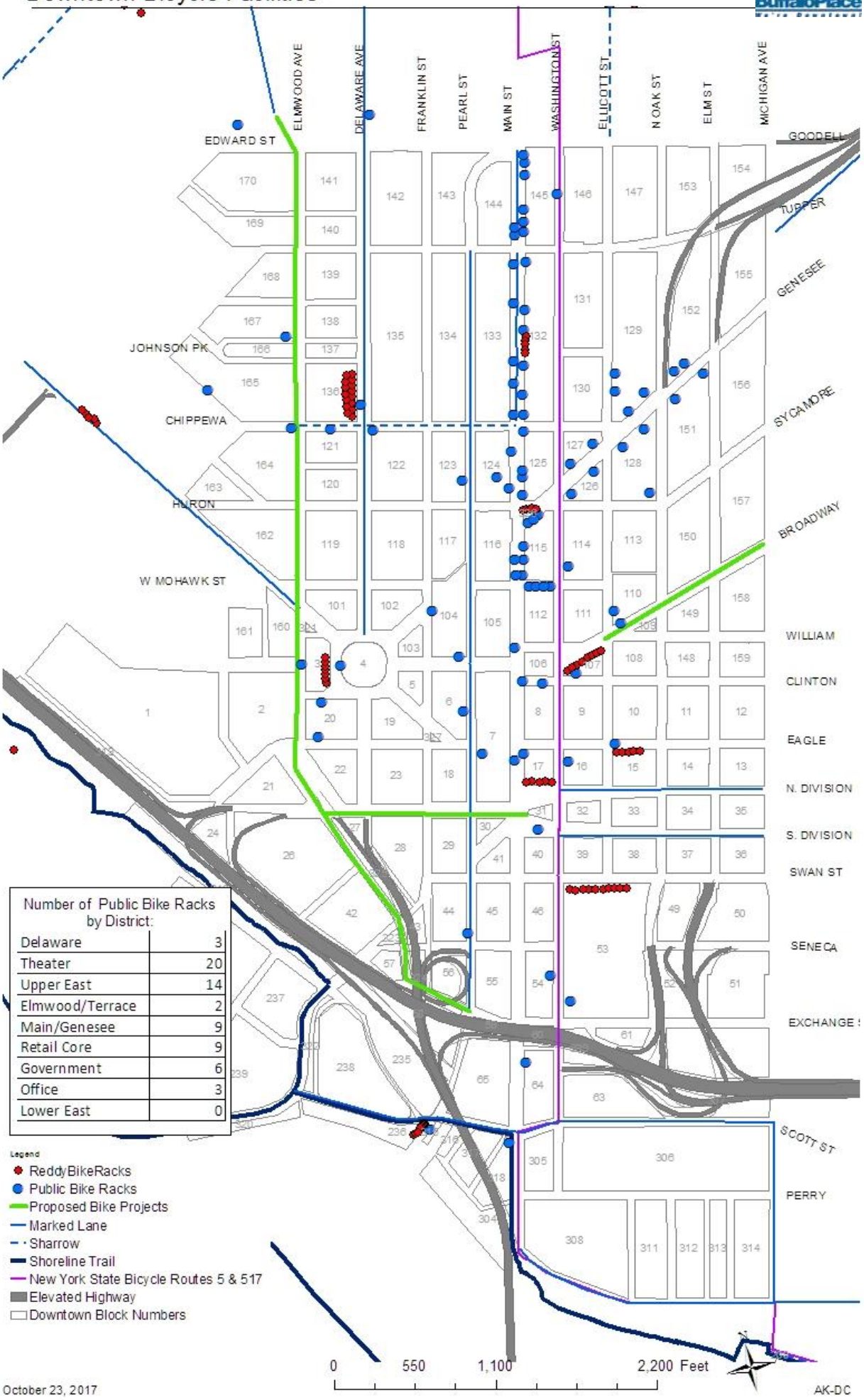
As of 2017, Downtown had 69 public bike racks within the city right of way, and within the publicly owned Buffalo Civic Auto Ramps operated parking facilities. Additional new public bike racks have been added in summer of 2018. The table below shows the breakdown of number of racks by district:

Table: Number of Public Bike Racks by District

Delaware	3	
Theater	20	
Upper East	14	
Elmwood/Terrace	2	
Main/Genesee	9	
Retail Core	9	
Government	6	
Office	3	
Lower East	0	

The following *Map: Downtown Bicycle Facilities* identifies bike projects, marked lanes, trails and bike rack locations

Downtown Bicycle Facilities



Number of Public Bike Racks by District:	
Delaware	3
Theater	20
Upper East	14
Elmwood/Terrace	2
Main/Genesee	9
Retail Core	9
Government	6
Office	3
Lower East	0

October 23, 2017

AK-DC

Reddy Bikeshare

Reddy Bikeshare is Buffalo's bike sharing organization, operated by Shared Mobility, Inc and launched during summer of 2016. The system operates throughout the City of Buffalo with 240 bikes and 35 station hubs. Twelve of the hubs are located within Downtown. The system runs on GPS-enabled "smart bikes" which do not need to be parked within a hub. This flexibility makes Reddy bikes available throughout Downtown, particularly within the Main Street corridor where parking is free for Reddy Bikes at any public bike rack. Two of the most popular Downtown hub locations for Reddy Bikes are at Canalside at the corner of Marine Drive and Commercial Street, and at the corner of Delaware Avenue and West Chippewa Street. The system currently has approximately 4,000 members.

Downtown catalyst projects recommended in the Buffalo Bike Master Plan Update, 2016

Two Downtown catalyst projects are included in the Buffalo Bike Master Plan Update:

1. Broadway Five-Point Intersection - This project links Broadway between Ellicott Street and Michigan Avenue. In particular, the project seeks to improve the intersection of Broadway/William/Ellicott Street, which is currently difficult to navigate via bicycle.
2. Church Street Cycle Track – This project was proposed for Church Street between South Elmwood and Main Street and North and South Division Streets between Main Street and Michigan Avenue. Church Street would be converted from a six or seven lane road to five lanes with a one-way cycle track on each side. North Division and South Division Streets would be converted from four lane roads in each direction to three lane roads with a one-way cycle track.

   North and South Division Streets were modified in 2017 with lane reductions and a one-way stripe-separated bike-lane on either side, as part of a NYSDOT project.

Additional future Bike Route Improvements planned by the City of Buffalo:

1. Marked bike lane and future Cycle Track on the west side of Elmwood from Niagara to Virginia Streets
2. Lower Terrace Bike lane - to connect from South Elmwood to Canalside

Bicycle Requirements in the Buffalo Green Code

The Buffalo Green Code has established standards for the number of bicycle parking spaces required for development of a new building or expansion by 2,500 sf or more.

Table: Bike Parking Requirements by Land use:

Residential	1 per 5 units
Offices	1 per 10000 sf gross floor area
Open Space	2 per acre
School	2 per classroom
Hotel	1 per 20 rooms
Entertainment	1 per 3000 sf
Restaurant	1 per 3000 sf
Retail	1 per 3000 sf
Industrial	1 per 10000sf
Warehouse	1 per 25,000sft
Metro Rail	20 per station
Parking	1 per 20 units
Passenger Terminal	1 per 10,000sf
Cultural Facility	1 per 10,000sf

A minimum of two bicycle parking spaces must be provided for each principal use where bike parking is required. After the first 20 bicycle parking spaces, no additional bicycle parking is required for a

principal use. When there is more than one use on site, required parking is the sum of required parking for the individual uses.

Buffalo Place Inc. calculated the individual property bicycle-storage requirement for each Central Business District (CBD) property. These are summed below for each Downtown district. If built new under new Greencode regulations, the CBD would need to contain bicycle parking for 3,954 bicycles, 1,252 in long-term, most likely interior locations; and 2,702 in outdoor, publicly accessible locations.

This quantity of outdoor bike parking seems high for the CBD, but since requirements are activated by new construction or significant remodeling of a largely developed area, the full volume is unlikely to be implemented. The list will help to identify locations that would benefit from publicly provided bicycle parking, including individual secure bicycle parking facilities desired by frequent riders. Because of their regular habits, frequent riders are at risk for bike theft.

Table: Sum of Individual Property Bicycle Storage Requirement per District

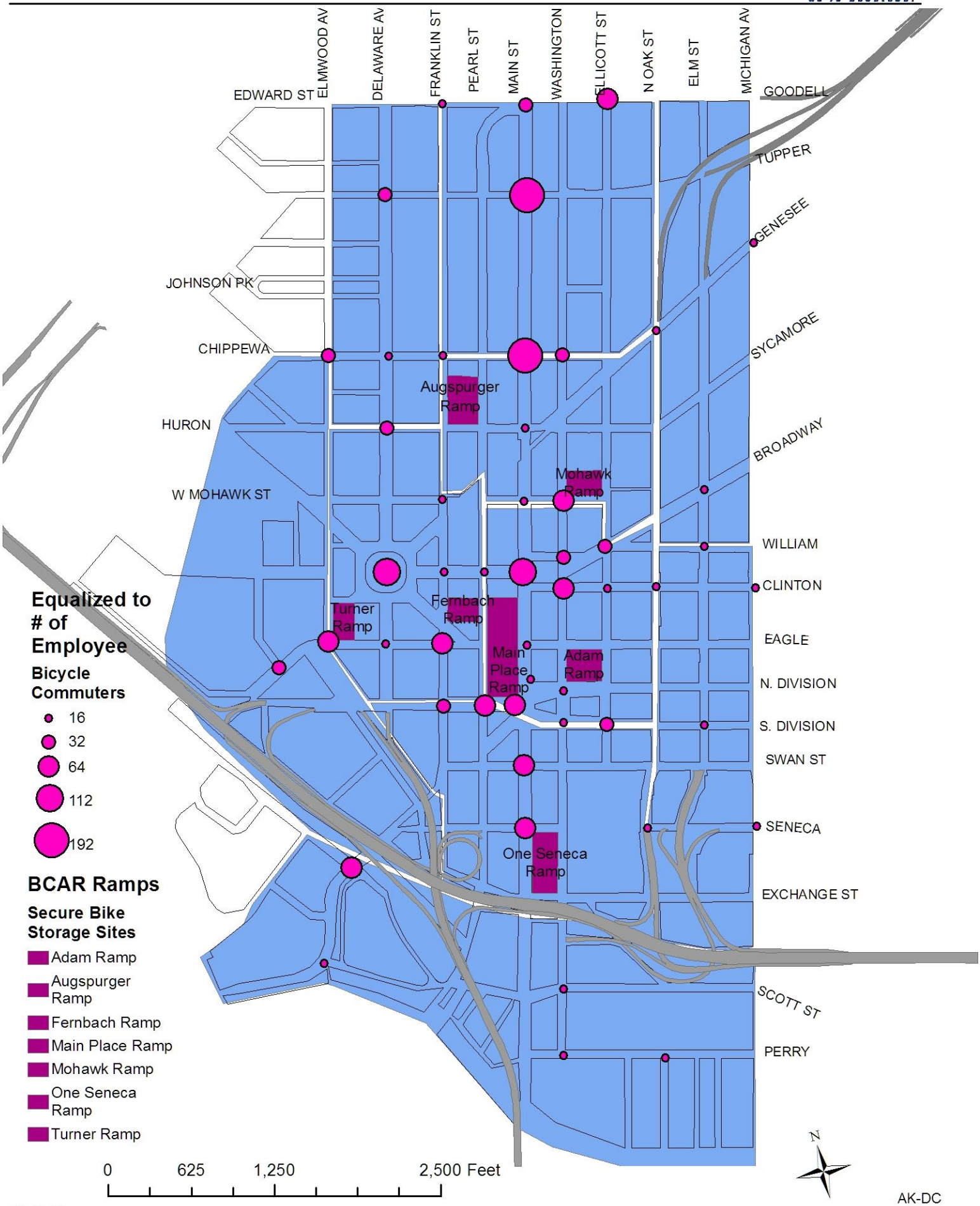
Downtown District	Calculated Bike Spaces Needed Per Green Code	Calculated Bike *Long-Term* Spaces Needed Per Green Code	Calculated Bike *Short-Term* Spaces Needed Per Green Code
Delaware	478	155	323
Theater	615	185	430
Main Genesee	394	138	256
Government	430	176	254
Retail Core	480	195	285
Elmwood Terrace	258	70	188
Office	482	118	364
Upper East	234	72	162
Lower East	219	65	154
Canalside	364	78	286
Total	3,954	1,252	2,702

The following *Map: Work Location of Employees Who Commute by Bicycle Daily or Often*, also assists in identifying locations for placement of secure, long-term bike storage. BCAR is considering placing a bike storage facility in one or more core area parking ramps. Private corporations were also willing to provide locations for long-term bike storage, also assists in identifying locations for placement of secure, long-term bike storage. BCAR is considering placing a bike storage facility in one or more core area parking ramps. Private corporations were also willing to provide locations for long-term bike storage

Recommendation to Support Bicycle Commuting.

- City and *2016 Buffalo Bike Master Plan Update* plans to support growth of bicycle use are in place and should be supported including projects to encourage additional bicycle use by less adventurous riders. These include: the Broadway Five-Point intersection at William and Ellicott to Michigan, and marked lane or cycle tracks on Church and Division between S. Elmwood and Michigan, S. Elmwood between Niagara and Virginia and Lower Terrace between S. Elmwood and Canalside.
- One needed item to support regular bicycle commuting would be external bicycle storage near bike commuter employment areas – in cages, secure rooms or lockers, to prevent theft. Bike lockers must be secure but have transparency for security reasons.
- Use of ReddyBike at large satellite parking lots for park and bike to core work locations.

Downtown Employee Survey Work Location
Respondents Who Commute to Work By Bicycle Daily or Often



June 18, 2018

AK-DC

Downtown Buffalo 2018 Transportation Mode Survey

Survey Distribution:

A survey of downtown employees was developed to better understand transportation habits and trends. A Downtown Buffalo Transportation Mode Survey was created on Survey Monkey and rolled out on Wednesday February 28, 2018. The survey was sent to Buffalo Place Board of Directors, Friends of the Board, and Retailers lists. Recipients were asked to forward to colleagues and interested parties. It was posted on the Buffalo Place Website and in our weekly newsletter from March 1 until April 19.

Articles were published in Buffalo News, Buffalo Business First, Buffalo Rising, WBFO, and WKBW-Channel 7. Posts were placed on Buffalo Reddit page and on the NextDoor App.

Posts were placed on Buffalo Place social media channels and by many of our partners, including GBNRTC, Invest Buffalo Niagara, GoBike Buffalo, Buffalo News, Business First, Working for Downtown, BUDC, NFTA, 500 Block of Main Street, CRTC, and others. Email invitations were forwarded to BCAR's list of parkers and Buffalo Library's patrons.

The Buffalo Place database was used to reach out via phone or email to downtown employers to ask them to forward along to their employees. More than 600 individual businesses and agencies were contacted.

A flyer was developed to hang throughout the community. Approximately 100 flyers were distributed to two dozen locations, such as coffee shops, Expo, the library, and popular lunchtime spots. Flyers were also distributed to the hotels and to larger restaurants, where employees are not desk-oriented, to request staff to place flyers near their timeclock to encourage their employees to take the survey as well.

An A-frame sign was placed on the street at several high pedestrian intersections, such as Lafayette Square, Main and Seneca, and Fountain Plaza.

The survey was closed on Monday May 7, 2018.

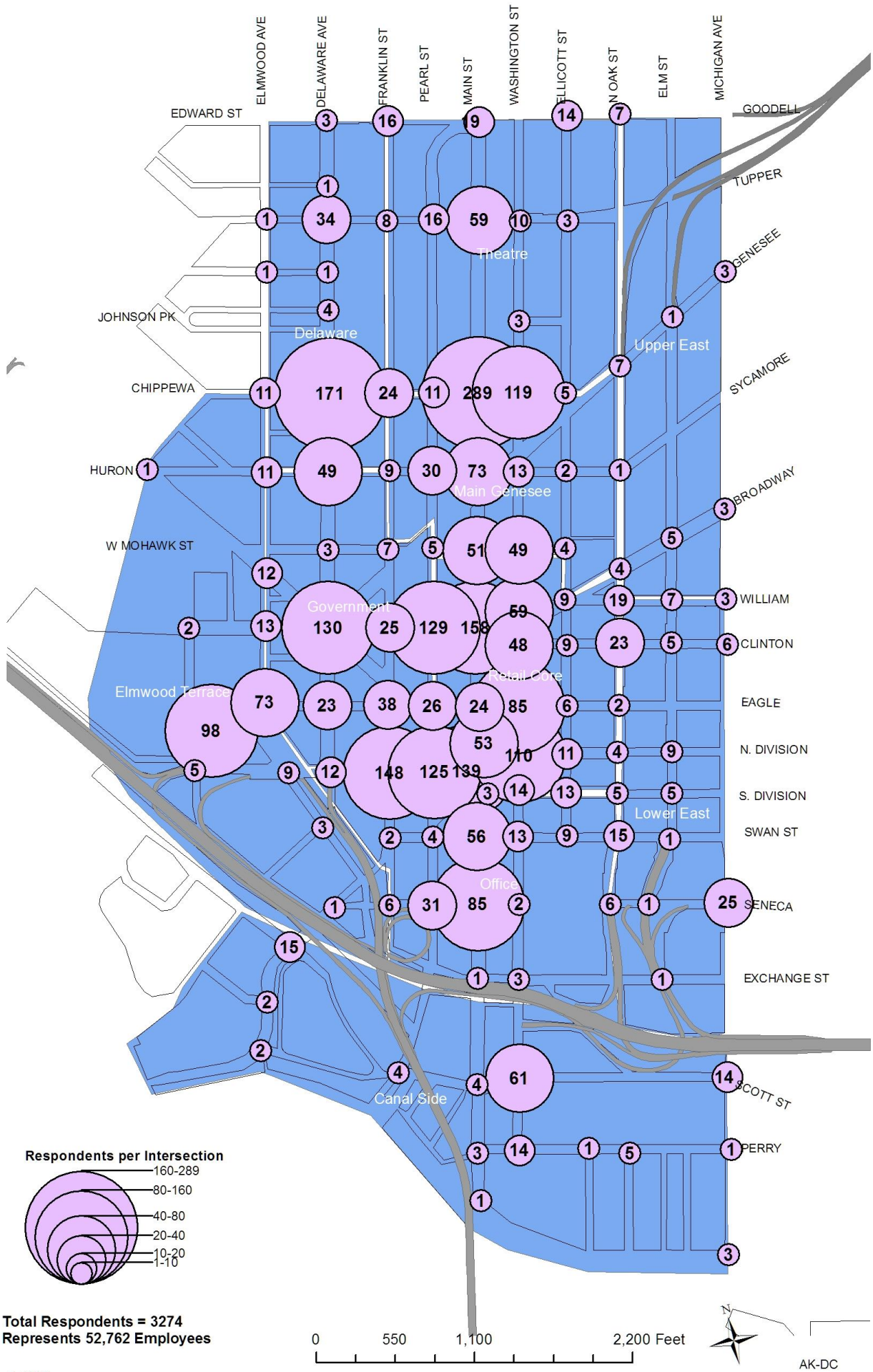
Survey Analysis:

Survey boundary area was same as our Access Study – Goodell/Edward to the north, South Elmwood to west, the water to the south, and Michigan to the east. Each intersection within the district was assigned a number. Responses were assigned an intersection number as they came in to determine if the individual worked within the study area. We had 4,044 total responses. Of those responses, 3,273 worked at a downtown intersection. Our current Buffalo Place estimate for employees is 55,362. This means we had responses from approximately 6% of downtown employees. Each survey result represents 16 employees. Of the other respondents, we had 349 who worked in Allentown/BNMC, 160 who worked in Larkin and 261 who either worked outside of Downtown or left employment location blank. Responses from those who did not work within our study area have not been tabulated.

Where Do Employees Work?

There were responses for employees who work at 120 out of 150 downtown intersections. The following map shows the number of people who responded at each intersection.

Downtown Employee Survey
Respondents Work Location



May 7, 2018

Where do Downtown Employees Live?

Of those who worked Downtown, 74 responses were from those who also live Downtown. An additional 85 Downtown employees live in areas around Downtown (i.e. Larkin, Lower West Side, Allentown). Responses were tabulated from Downtown employees from 93 zip codes, 9 New York State Counties and Canada.

Table: Number of Employees per Zip Code (3,250 responses):

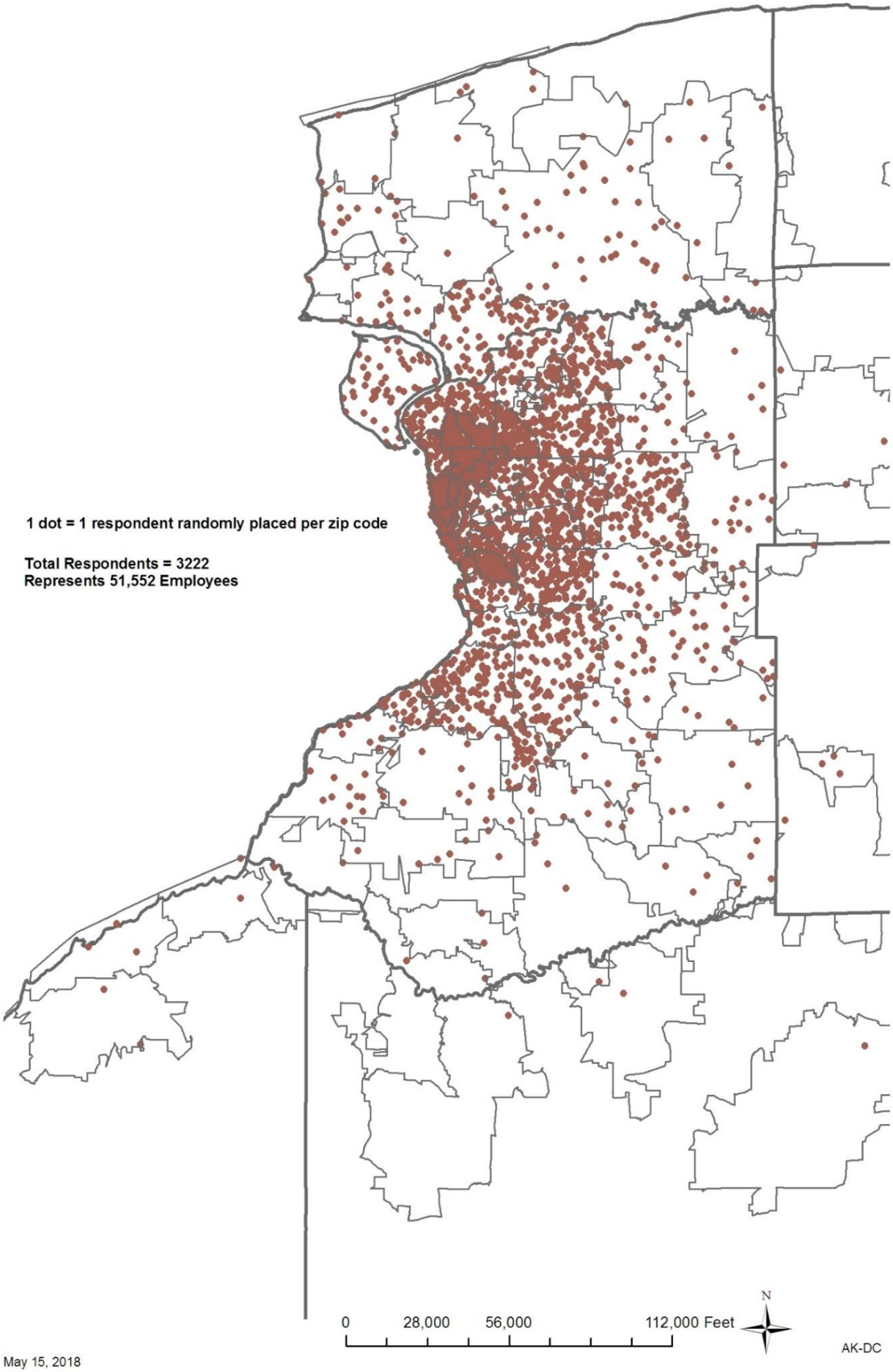
County	Number	Percent
Erie	3038	94%
Niagara	174	5%
Chautauqua	8	0.25%
Genesee	7	0.22%
Monroe	6	0.18%
Wyoming	5	0.15%
Cattaraugus	4	0.12%
Orleans	1	0.03%
Yates	1	0.03%
Canada	6	0.18%

The highest responses were from the following zip codes:

- 14216 – North Buffalo(175 responses)
- 14075 – Hamburg(172 responses)
- 14224 – West Seneca(149 responses)
- 14221 – Williamsville (148 responses)
- 14226 – Amherst (142 responses)

The following maps show the distribution of respondent's home addresses by home intersection and by zip code.

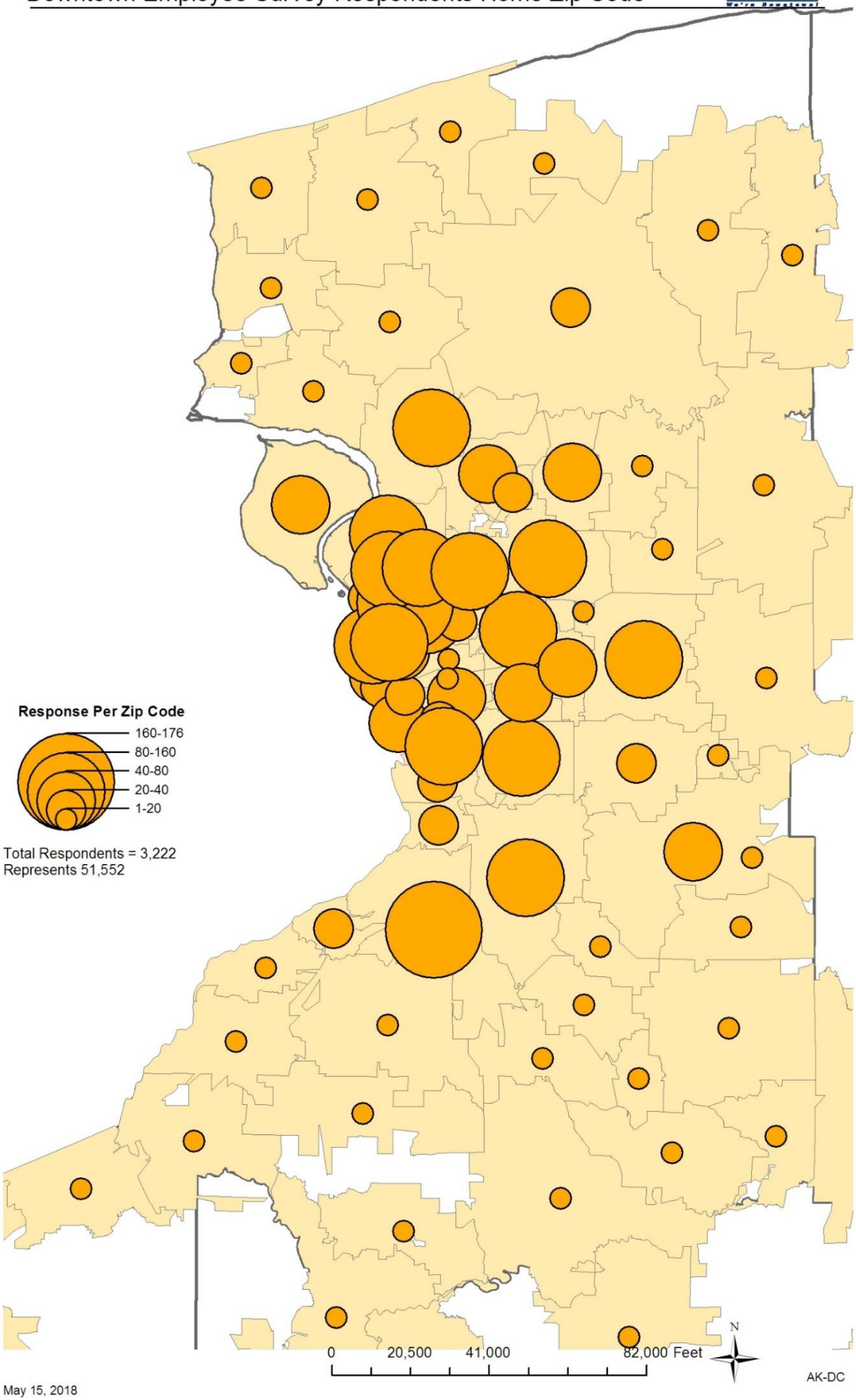
Downtown Employee Survey Respondents Home Location



May 15, 2018

AK-DC

Downtown Employee Survey Respondents Home Zip Code

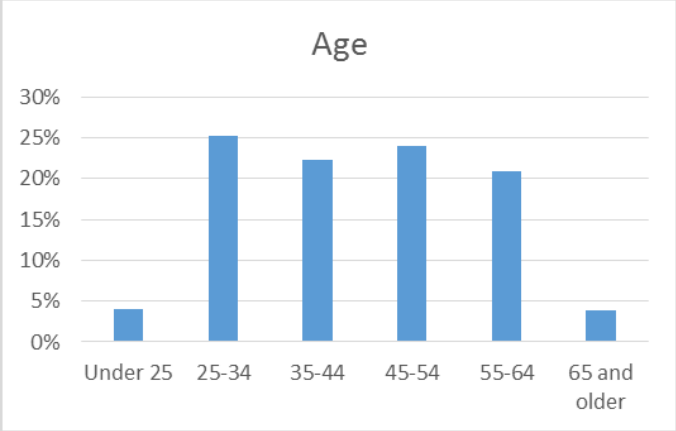


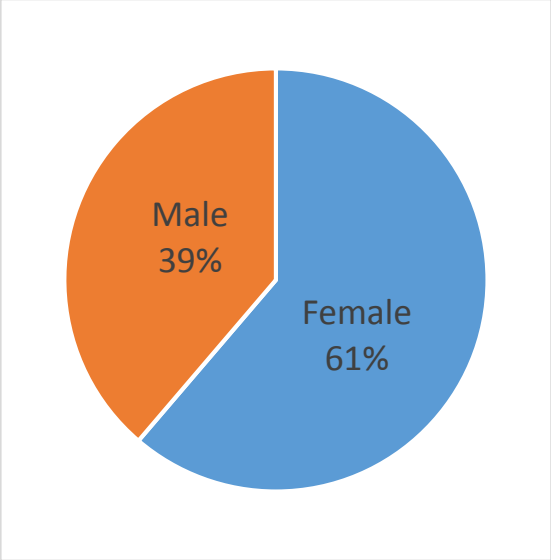
May 15, 2018

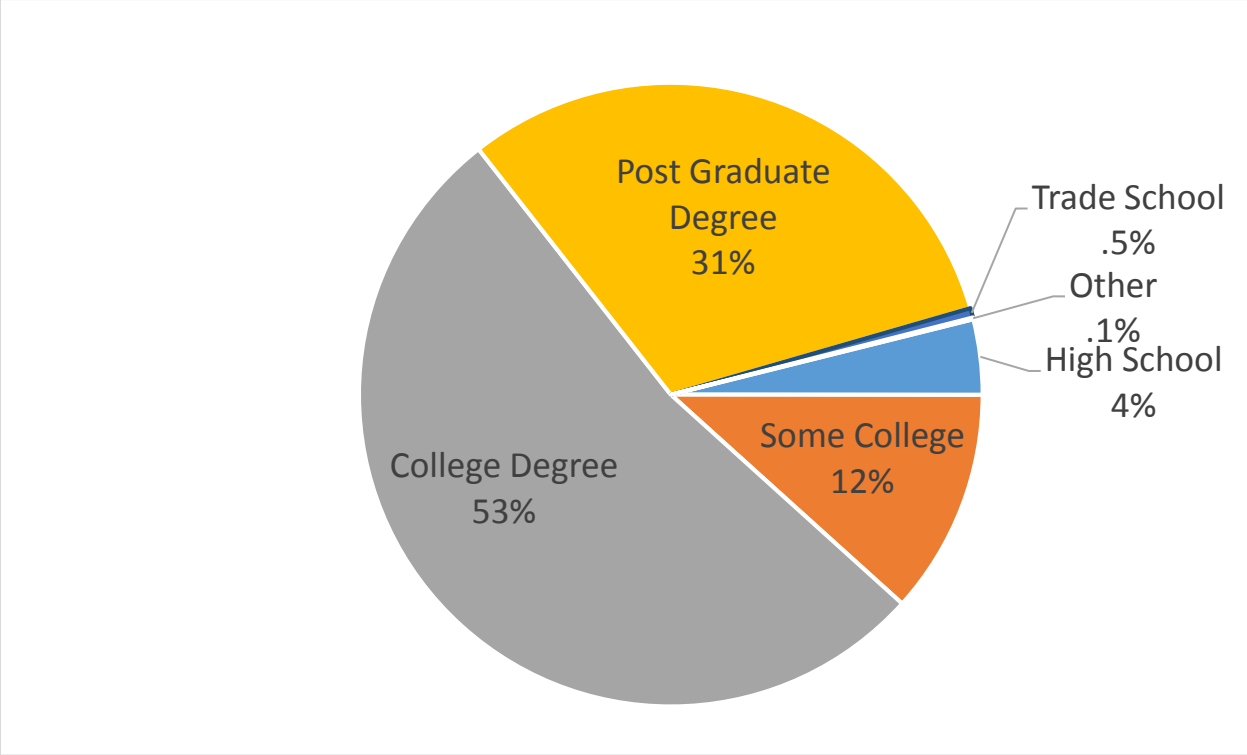
AK-DC

Who are Downtown Employees?

As the following charts show, respondents were relatively evenly distributed for age. More females took the survey than males. Downtown employees are highly educated, with 84% having a college degree or higher.

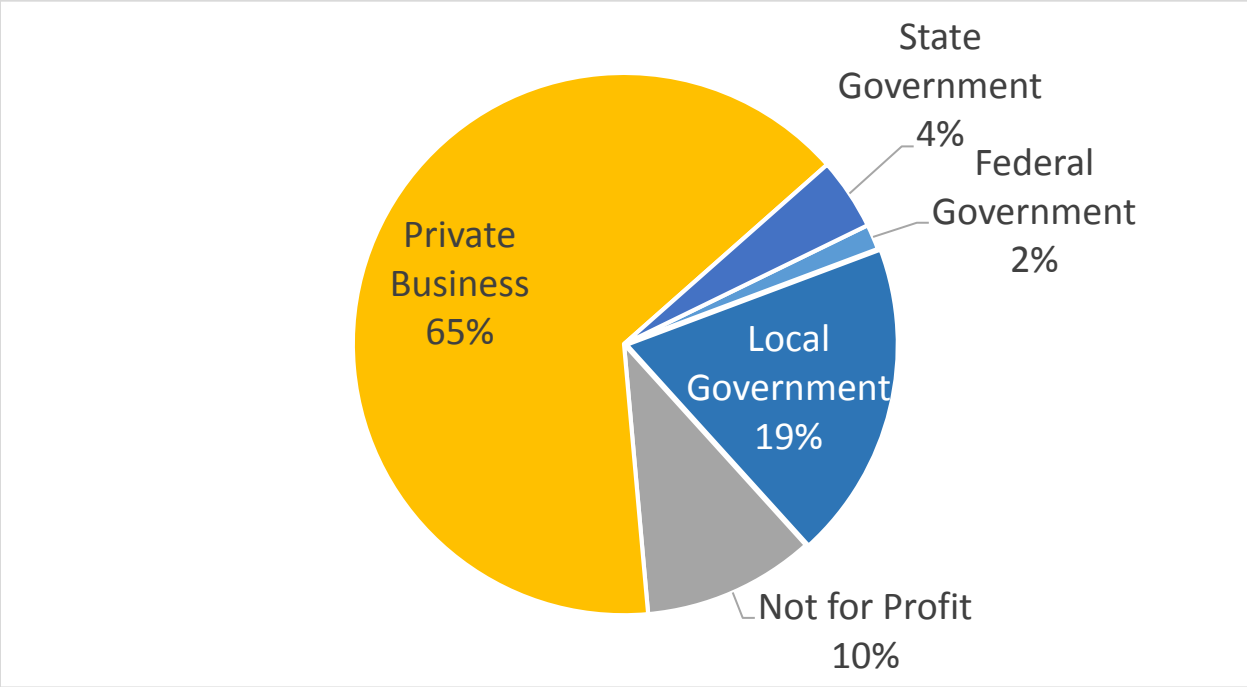




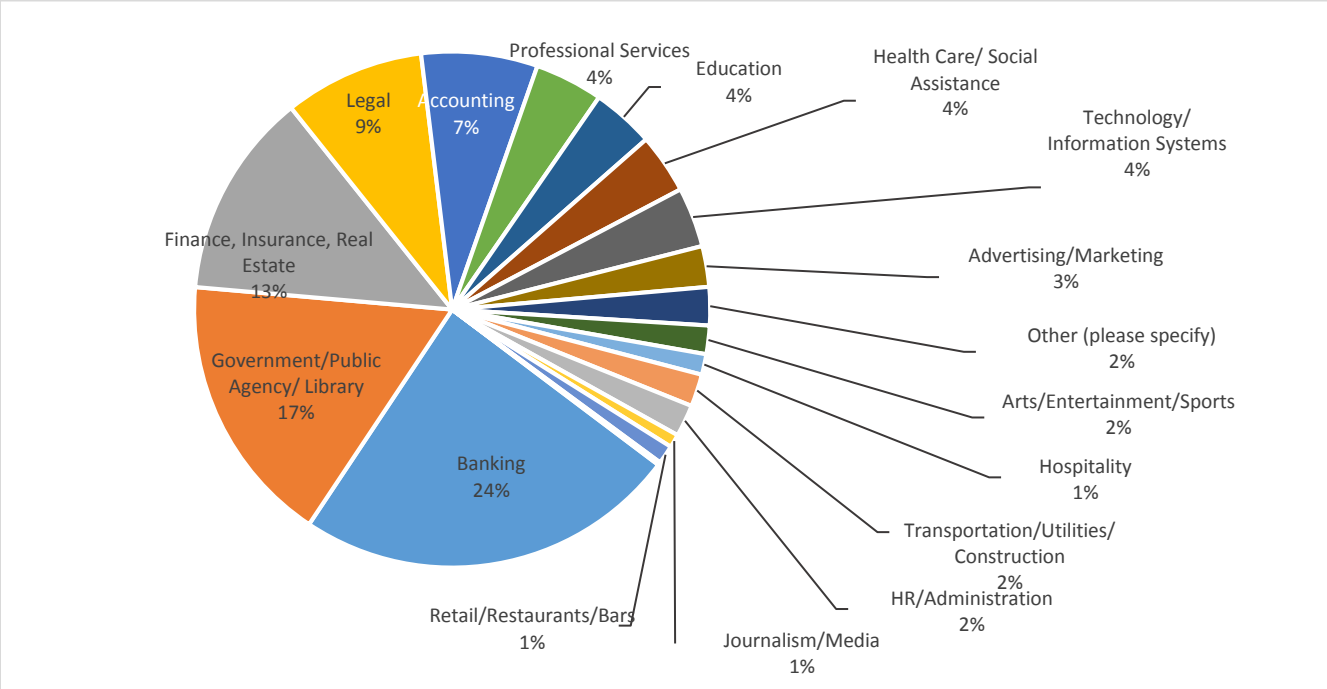


Where do Downtown Employees Work?

Most employees (65%) work for private businesses. Ten percent work in the nonprofit sector. The remaining 25% work for the public sector, with a mix of federal, state, and local government employees.

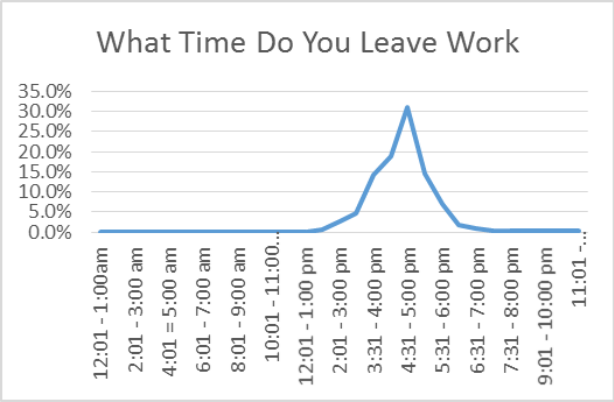


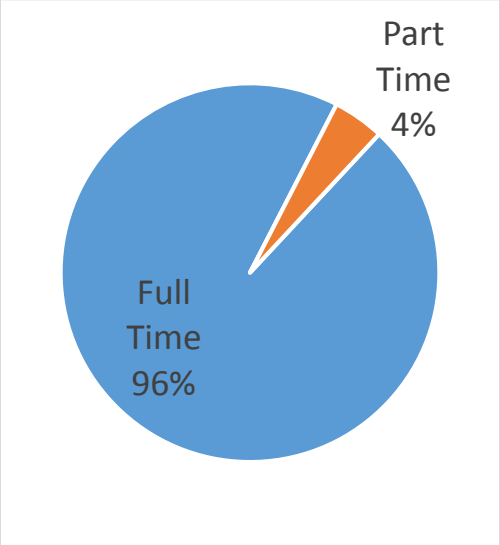
The following chart shows common occupations for Downtown employees.

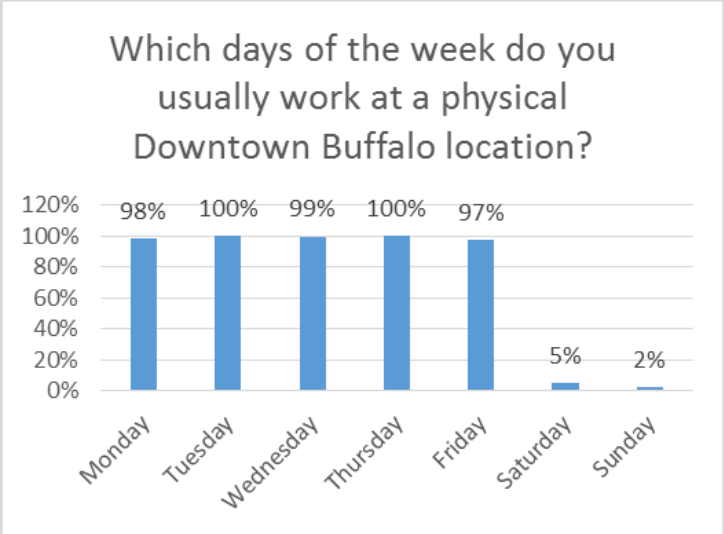


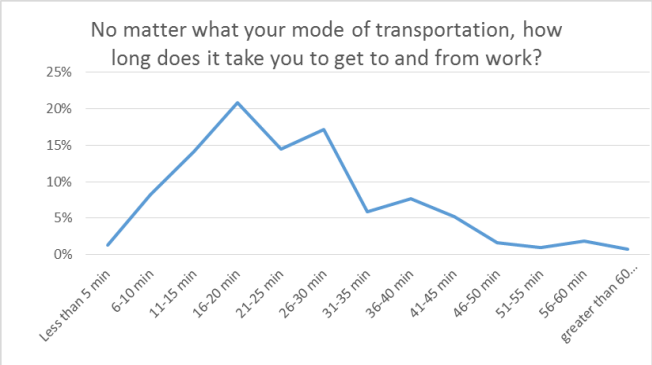
When are employees commuting to Downtown?

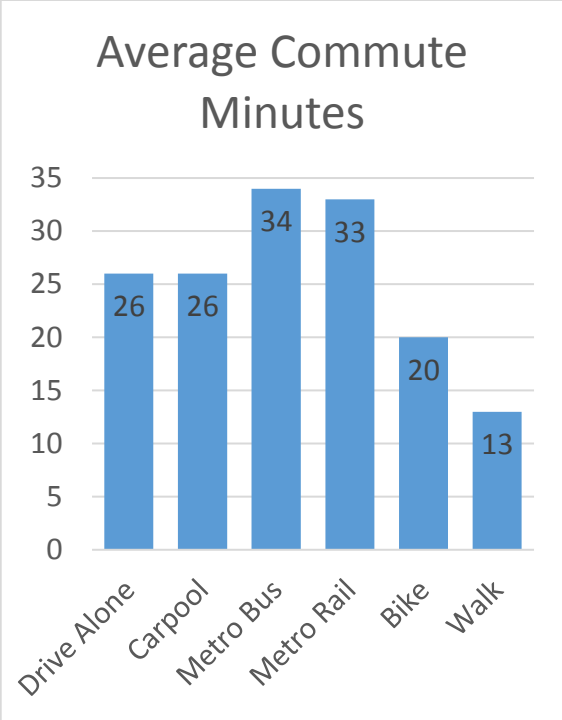
Flextime appears to have increased over the last 19 years. This has particularly affected morning commute times. Currently, 85% of Downtown employees arrive between 7 am and 9 am. On previous survey, the response was 95% during the same time. For evening commute, 90% leave between 3pm and 6pm. On previous survey, 93% left work during that time. The majority of respondents are full time employees, with only 4% working part time. People are mostly still working a five-day workweek, with the majority (100%) of people working on Tuesdays and Thursdays. Commute times on average range from 13 minutes for walkers to 34 minutes for bus riders. Average commute times for those in personal vehicles average 26 minutes. The following charts show survey responses.





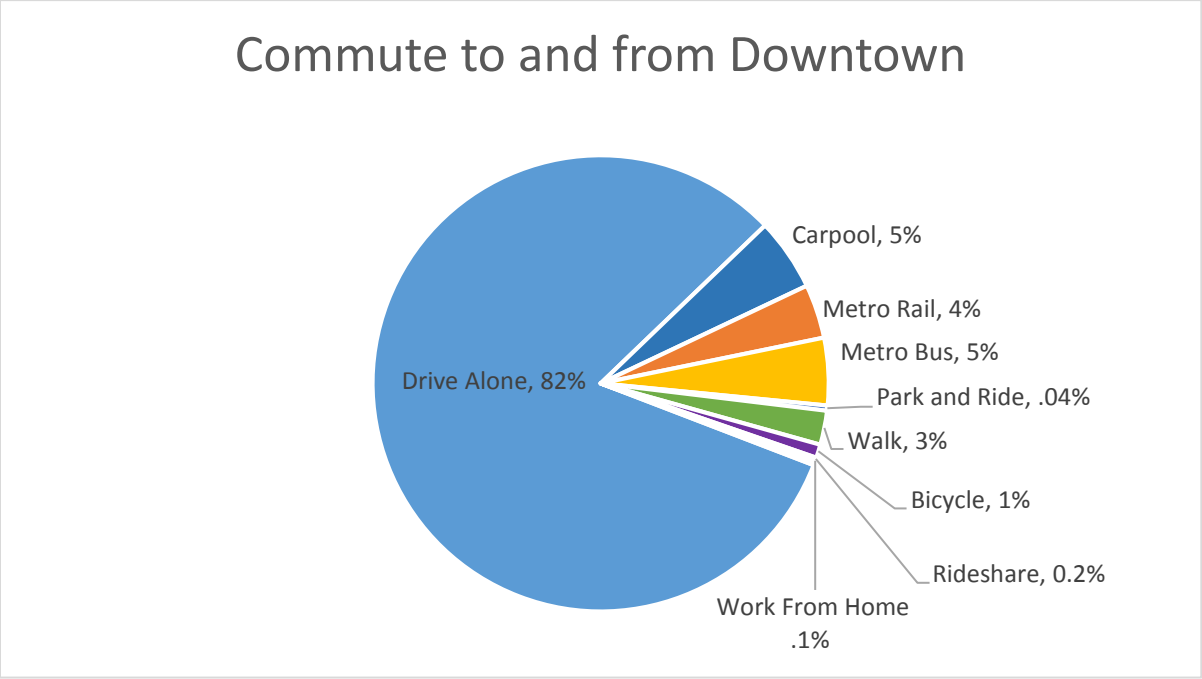



No matter what your mode of transportation, how long does it take you to get to and from work?
25%
20%
15%
10%
5%
0%
Less than 5 min
6-10 min
11-15 min
16-20 min
21-25 min
26-30 min
31-35 min
36-40 min
41-45 min
46-50 min
51-55 min
56-60 min
greater than 60...


Average Commute Minutes
35
30
25
20
15
10
5
0
26
26
34
33
20
13
Drive Alone
Carpool
Metro Bus
Metro Rail
Bike
Walk

How Do Employees Get to Downtown?

Most employees (87%) drive to work, with 82% driving alone and 5% carpooling. This number appears to be growing. The 1998 Buffalo Place survey had only 80% of respondents driving to work. While a greater percentage are now walking (3%) and biking (1%), it appears that fewer people are taking Metro Rail and Bus to get to work. Responses in 2018 indicate that 9% currently use transit, while in 1998, 19% used transit.



As the table below shows, when the mode split was calculated by gender, it appears that women tended to be more likely to use a private vehicle to arrive at work, while men were slightly more likely to walk or bicycle.

	Everyone who answered question (3238 Responses)	Men (1248 Responses)	Women (1984 Responses)
Drive Alone	82%	80%	83%
Carpool	5%	4%	6%
Metro Rail	4%	4%	3%
Metro Bus	5%	5%	5%
Park and Ride	0.3%	1%	0.2%
Walk	2%	3%	2%
Bicycle	1%	2%	0.4%
Rideshare	0.2%	0.2%	0.2%
Work from Home	0.1%	0	0.1%
Other	0.3%	0.3%	0.3%

Note: Highlighted cell shows where number is higher than the general population's response.

When mode split was divided by age, it appeared that those who are under 25 or between 35 and 54 are more likely to use a private vehicle to commute to work. Those 55 and over appear to be more likely to carpool or use public transportation. Younger people, under the age of 44, and those over 65 appear to be more likely to walk to work. Those between 25 and 35 seem slightly more likely to ride a bike to work.

The table below shows the mode split by age.

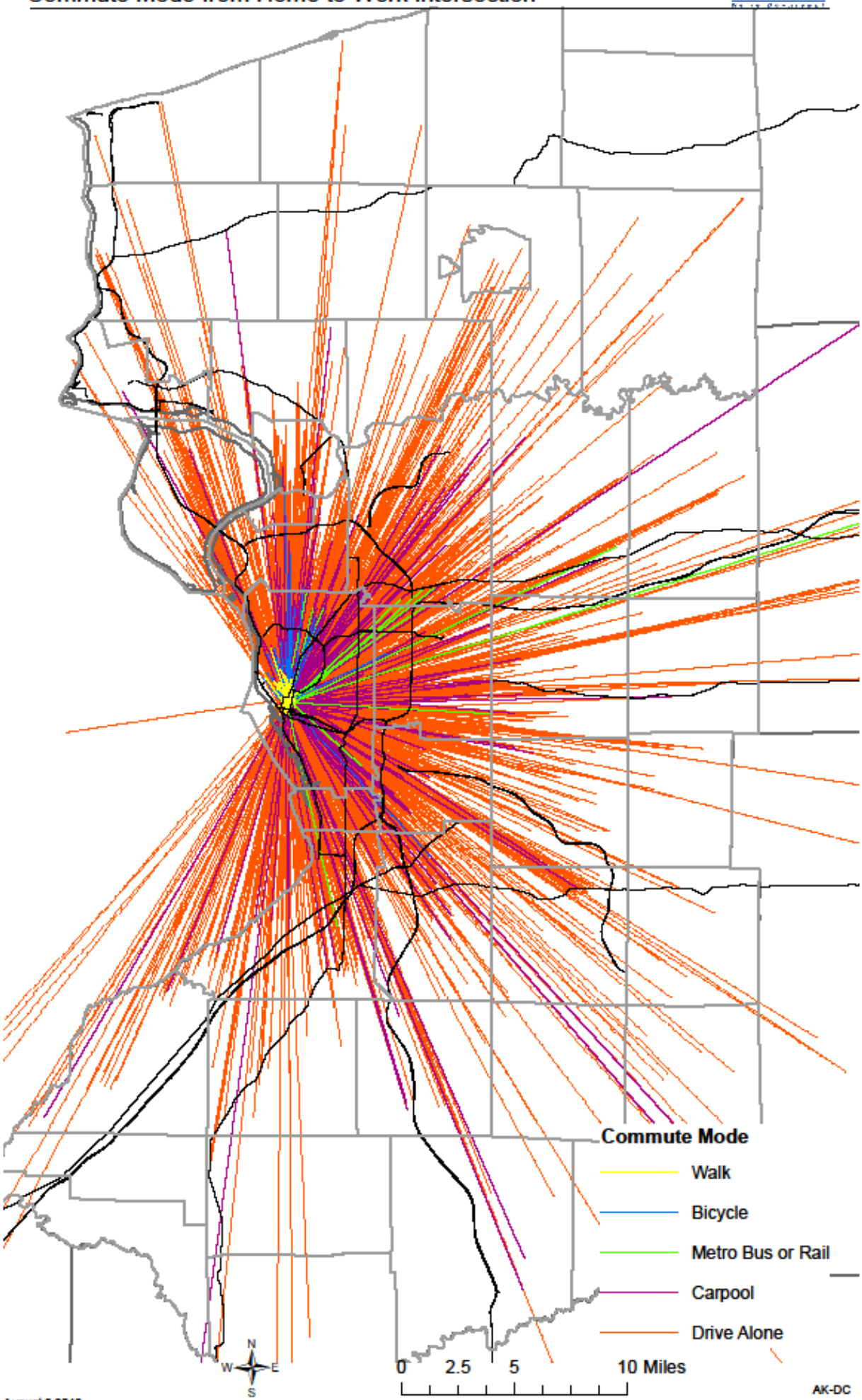
	Everyone who answered question (3256 responses)	Under 25 (119 responses)	25-34 (821 responses)	35-44 (727 responses)	45-54 (781 responses)	55-64 (681 responses)	65 and older (127 responses)
Drive Alone	82%	84%	79%	83%	87%	79%	80%
Carpool	5%	5%	5%	4%	5%	6%	6%
Metro Rail	4%	3%	5%	4%	2%	5%	6%
Metro Bus	5%	3%	4%	5%	4%	6%	10%
Park and Ride	0.3%	1%	0.5%	0.1%	0.3%	0.3%	1%
Walk	2%	4%	4%	3%	1%	1%	3%
Bicycle	1%	0%	2%	1%	1%	1%	0%
Rideshare	0.2%	0%	0%	0.4%	0.1%	0.1%	1%
Work from Home	0.1%	0%	0%	0%	0%	0%	0%
Other	0.3%	0%	0%	0%	0%	1%	0%

Note: Highlighted cell shows where number is higher than the general population's response.

The next three maps show the following:

1. A line between the work and home intersections of all respondents
2. Home intersections of respondents who Drive Alone and Carpool,
3. Home intersections of respondents who Ride Metro Rail or Bus, and
4. Home intersections of respondents who Bicycle, Walk or Work from Home.

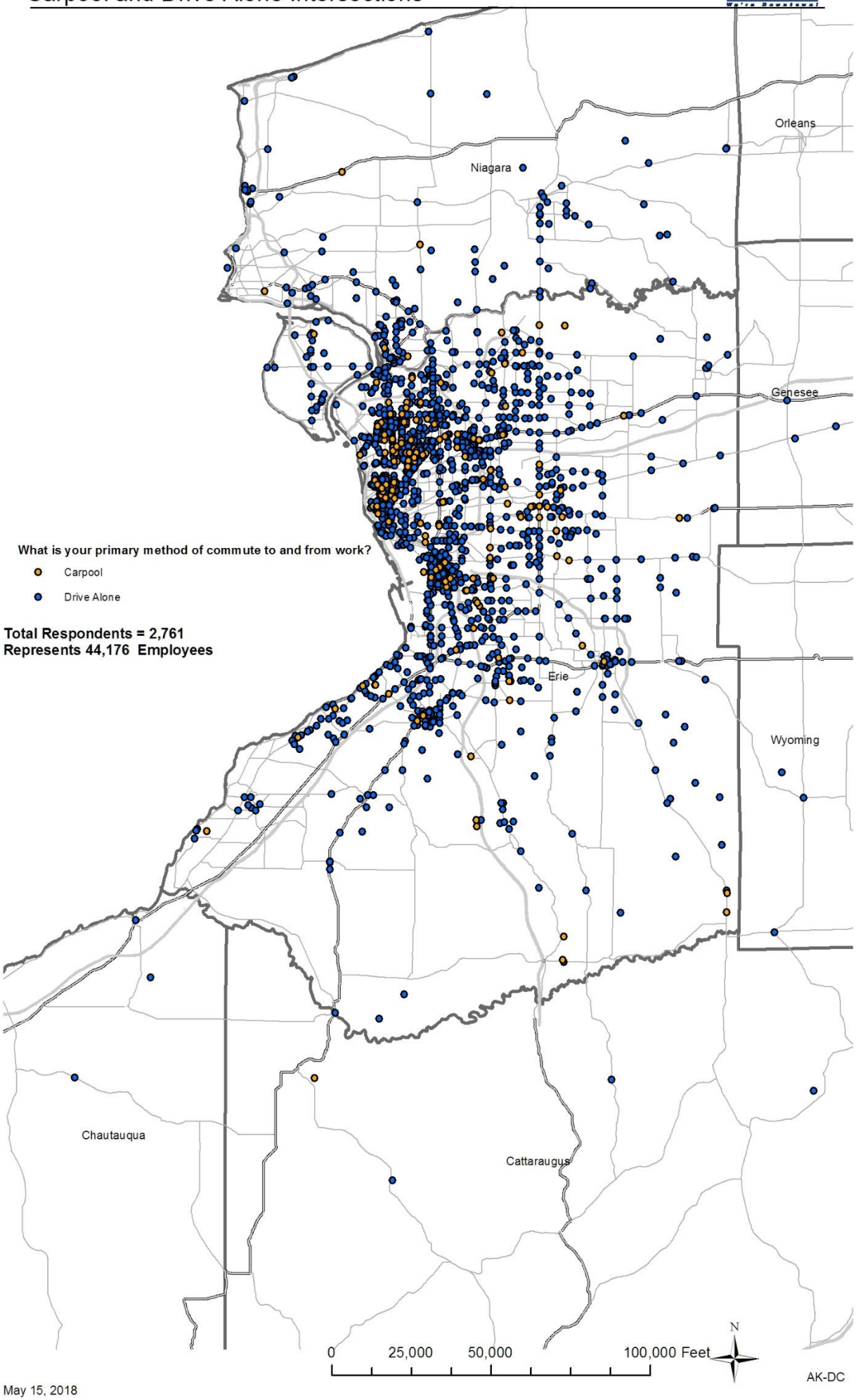
Downtown Employee Survey
Commute Mode from Home to Work Intersection



August 8 2018

AK-DC

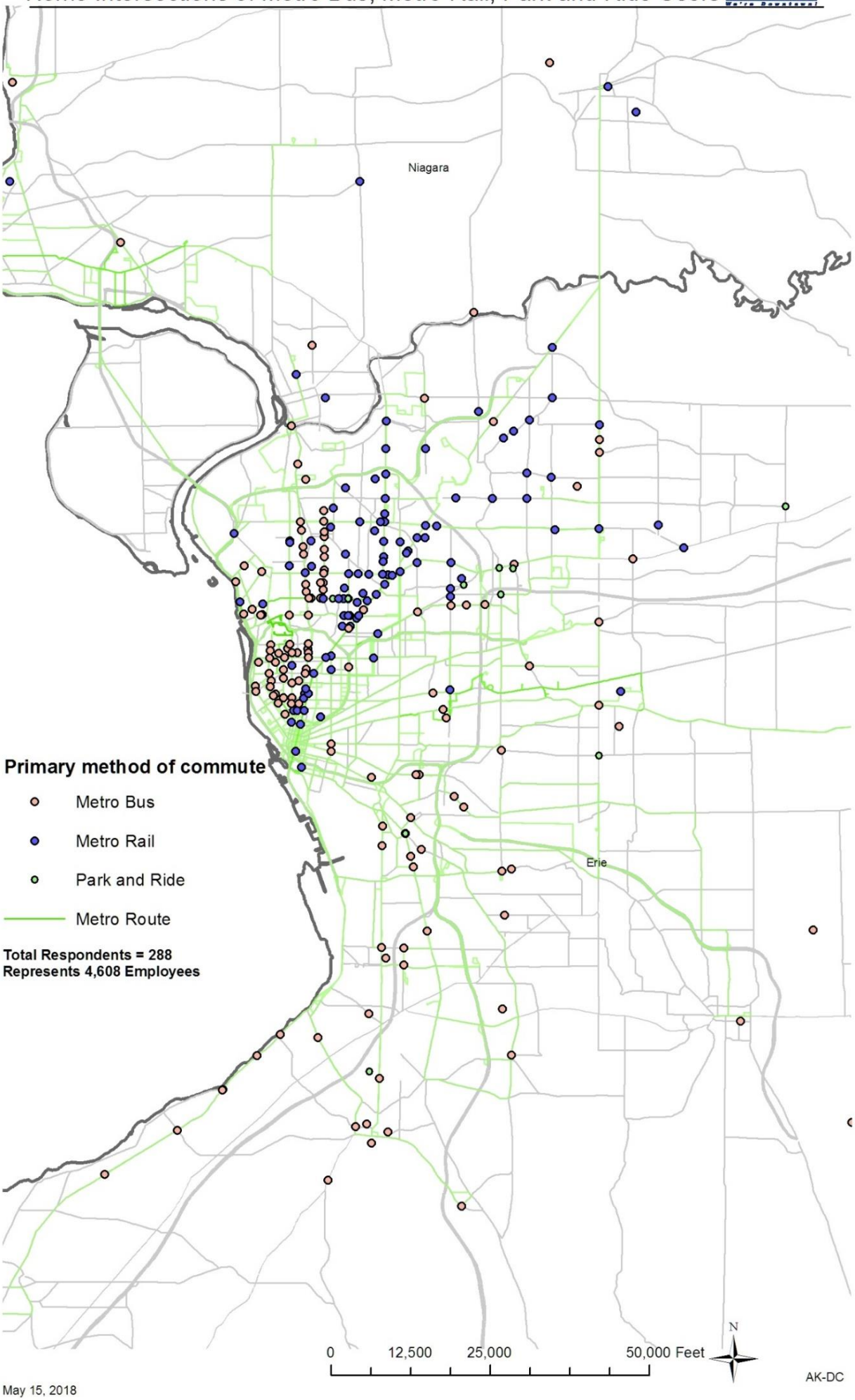
Downtown Employee Survey Responses
Carpool and Drive Alone Intersections



May 15, 2018

AK-DC

Downtown Employee Survey Respondents
Home Intersections of Metro Bus, Metro Rail, Park and Ride Users



May 15, 2018

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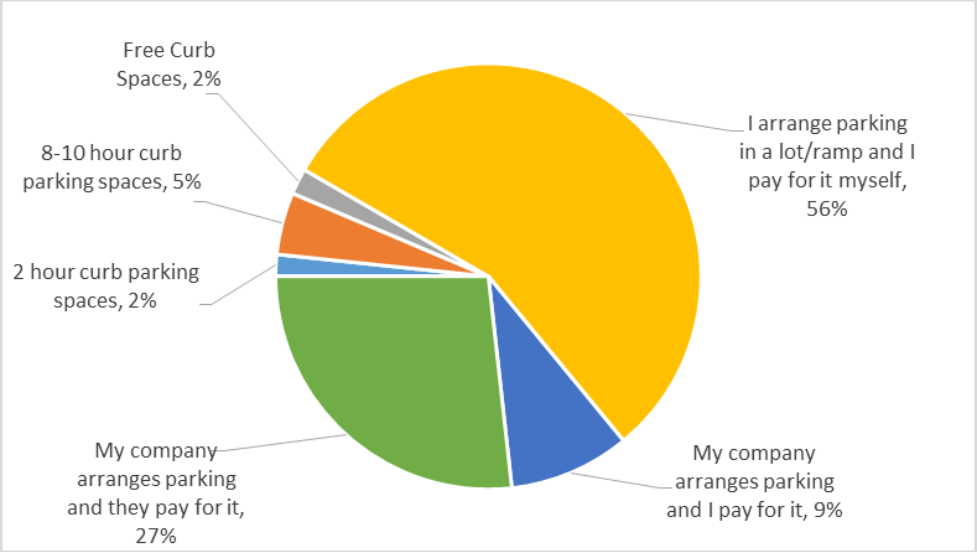
Downtown Employee Survey Responses
Walk, Bike and Work from Home Intersection

May 15, 2018

AK-DC

Where Do Downtown Employees Park?

The majority of Downtown employees (65%) pay for parking that they or their company arranges. For 27% of employees, their employer pays for parking, either in a lot the company owns or the company arranges for the space in a shared facility. Five percent of employees find all day parking at the curb, which may include government restricted curb parking and free spaces on periphery, in addition to the all-day meters on the street. Two percent, or 47 respondents, are parking at 2-hour meters. This equates to between 752 and 886 people in Downtown. While this may not seem like a lot, there are only 1,284 2-hour meters in Downtown Buffalo, therefore 59% to 69% are being used by employees, illegally for long duration parking. If they were left open for short-term users, as they are designed, 3,008 to 3,544 vehicles could park each day for the average 2-hour duration. It would cost those visitors only $4, as opposed to the higher rates in off-street facilities. Research regarding the value of a prime parking space outside of a retail business is approximately $150-300/day. When business owners and retail employees park in these spaces, it can equate of a yearly loss of $45,000-$90,000 a year for those businesses.

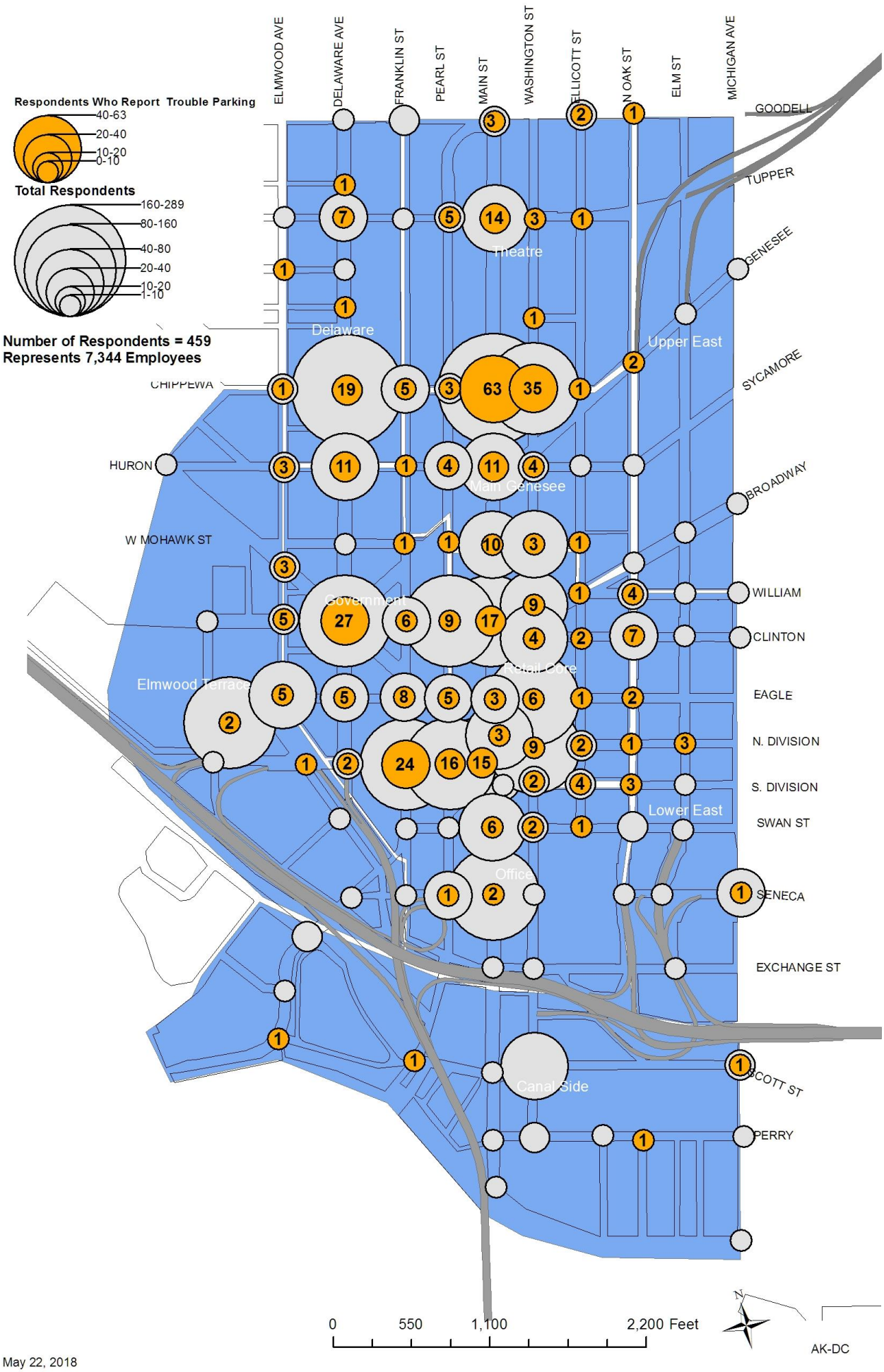


How Far Away Do Downtown Employees Park?

Employees were asked if they have trouble finding parking for work. While 84% said no, 16% said yes. This translates to between 7,344 and 8,858 Downtown employees who have trouble finding parking for work. The first map below identifies locations where people indicated trouble finding parking. The greatest percentages were located within the Downtown Core and the northern section of Downtown.

Almost half (48%) of Downtown employees are parking a 0-2 minute walk from their office. Research indicates that employees prefer no more than a 1/4 to 1/3 mile walk from their car to the office. This equates to a 4-5 minute walk, as people tend to walk about 300 feet per minute. Currently, 19% of Downtown employee survey-respondents walk further than this comfortable distance from their car to their office. This equates to more than 8,300 people who currently park further from work than desired, or is found optimal in our downtown. The second map below shows the number of people at downtown intersections who currently park further than a 5 minute walk from their office. They are generally located in the Downtown Core, where parking supply is tightest. A table showing the travel time between work and parking follows.

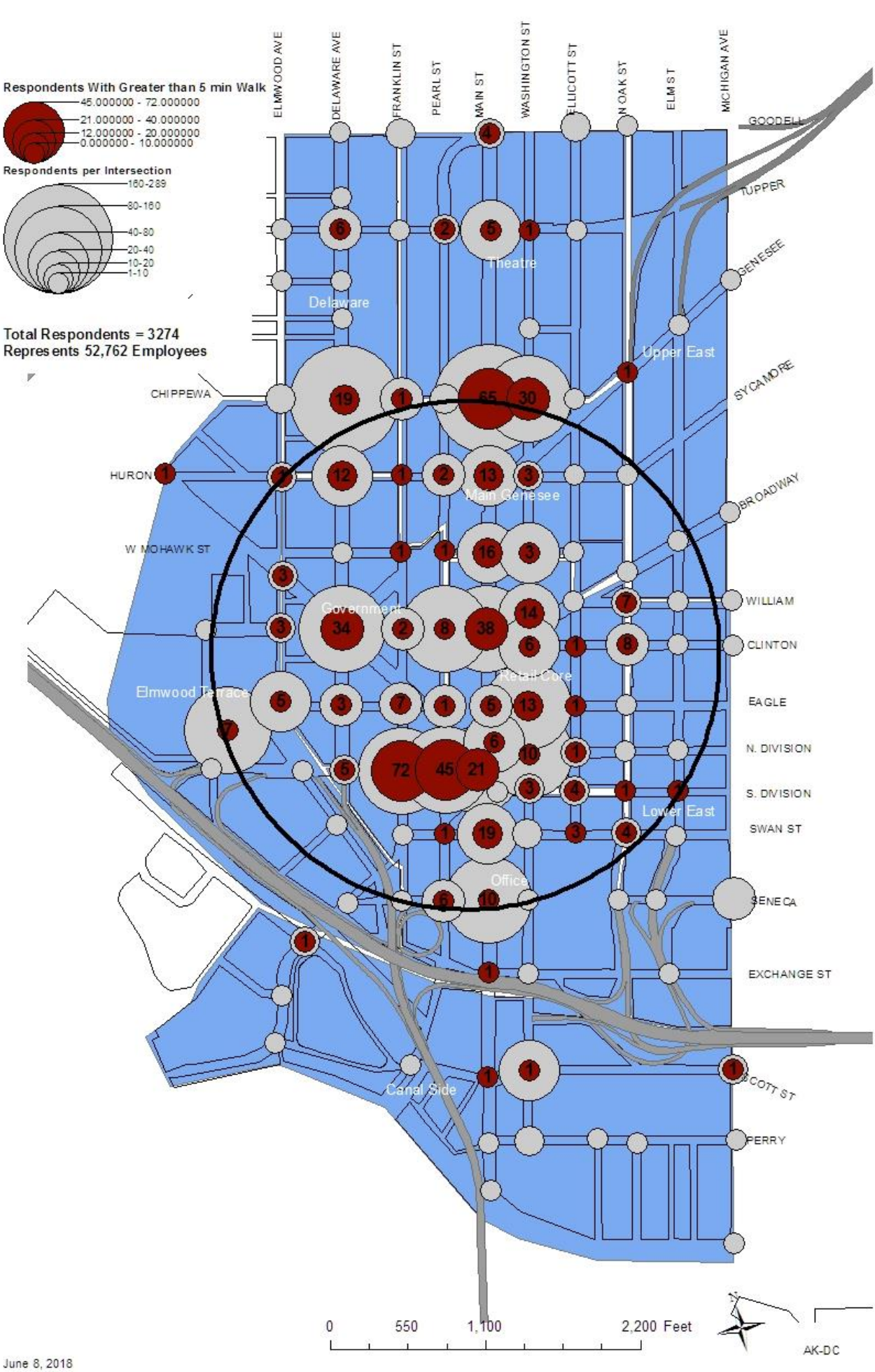
Downtown Employee Survey
Respondents Who Have Trouble Finding Parking



May 22, 2018

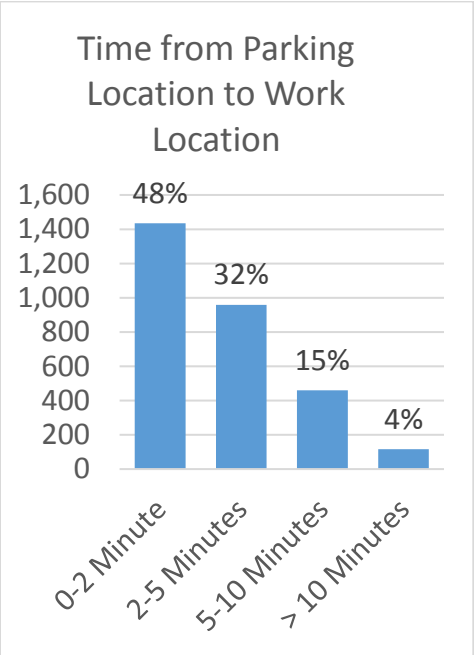
AK-DC

Downtown Employee Survey Work Location
Respondents Who Park Further than 5 min From Work



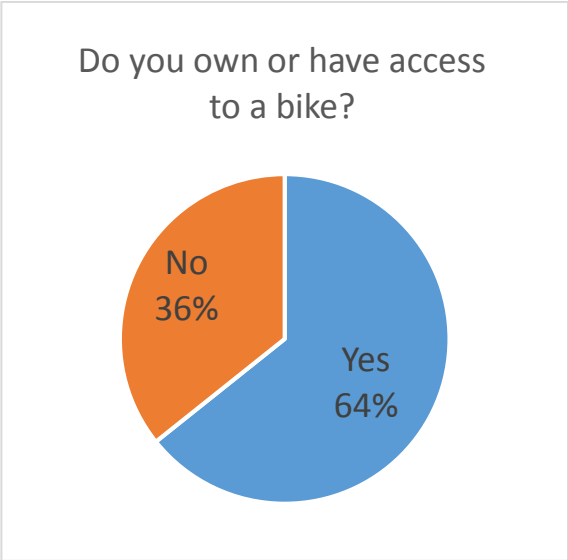
June 8, 2018

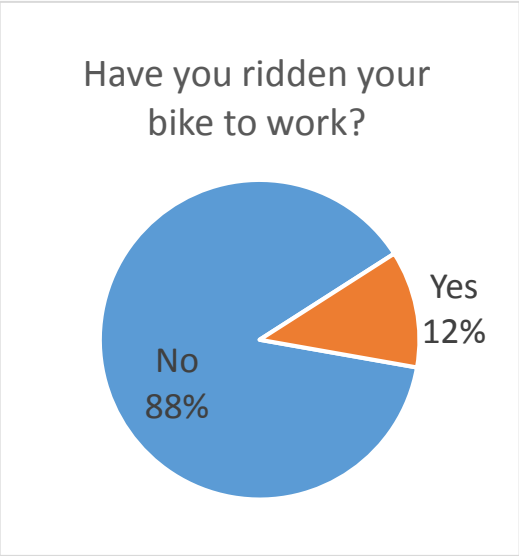
The following chart shows the amount of time respondents said that it took them to walk from their parking facility to their office.

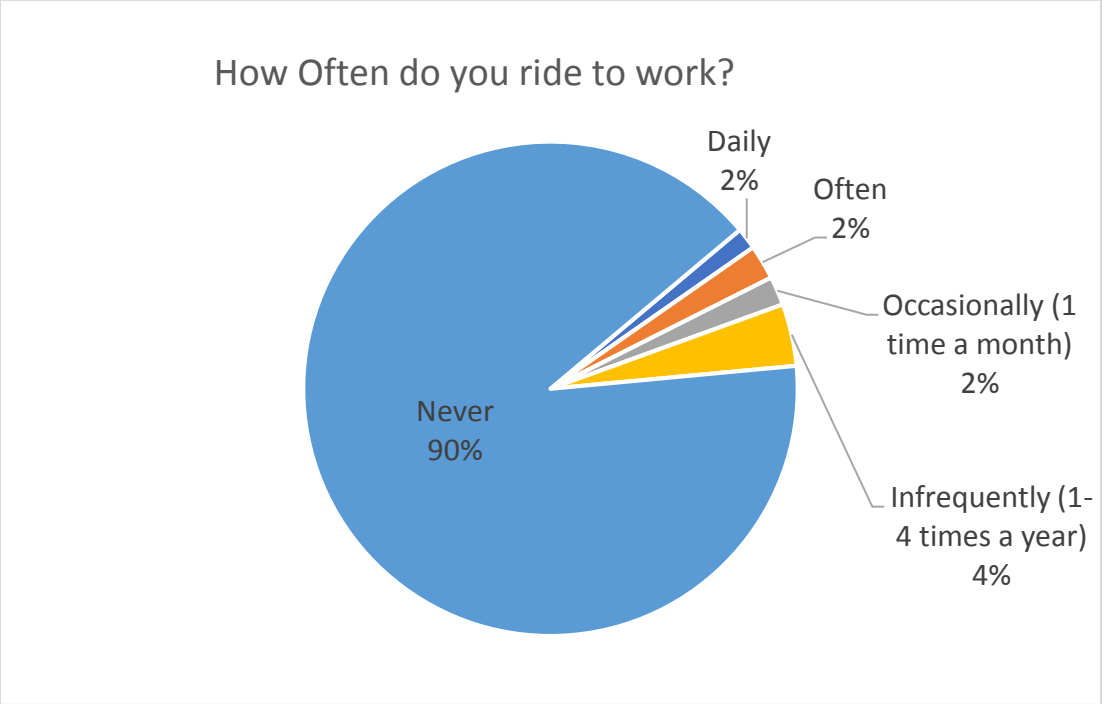


Could You Travel to Work By Bicycle?

64% of employees said that they own a bicycle and 12% said that they have ridden their bicycle to work. This equals 4,464 employees who have ever ridden their bicycle to work. This is the target group for increased bicycle commuting. Of those who ride to work, 1% ride daily and 2% ride often (1-2 times a week), equaling 1872 committed bicyclists. This is equal to the number of commuters utilizing a large parking ramp. At a development cost of $30,000 per space, it represents a savings of $56 million not spent to provide downtown parking.

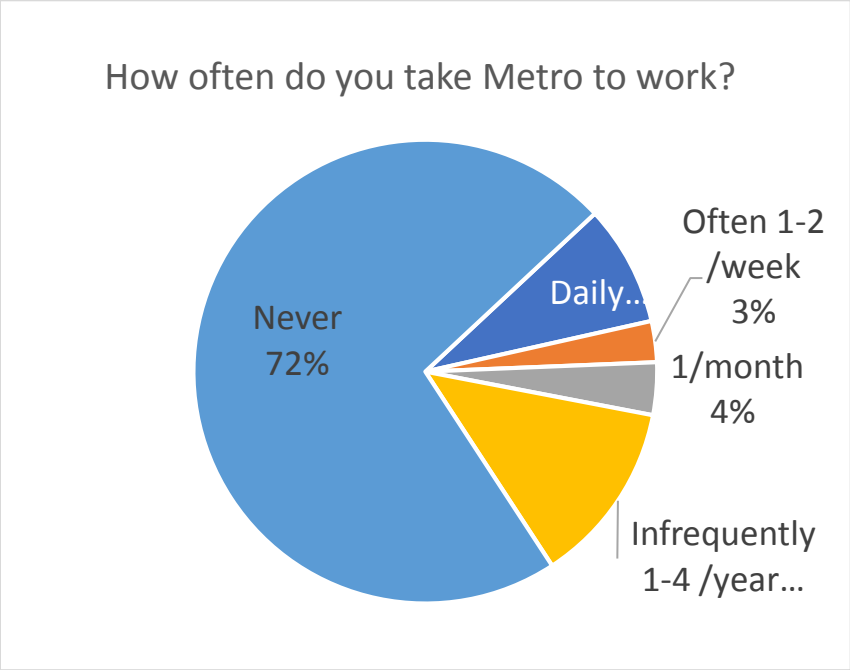




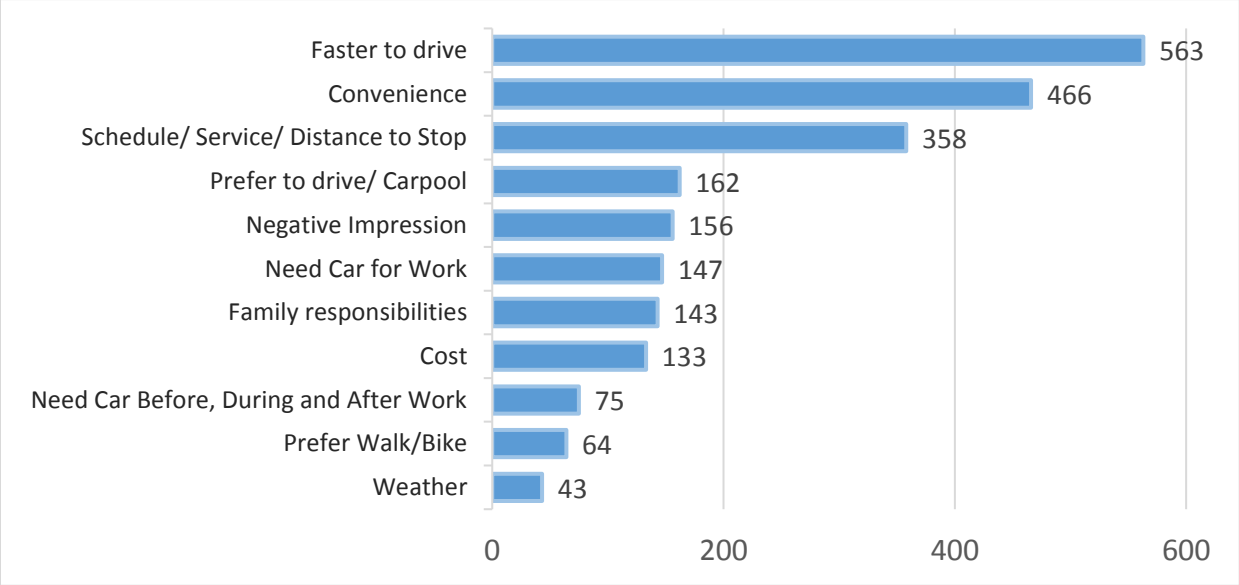


Could You Travel to Work Via Transit?

64% of Downtown employees said that they could use Metro Bus or Rail to get to work. This equates to 28,800 people. Currently 8% of respondents use public transit daily and 20% use transit from time to time. 20% equates to 10,032 employees who use transit from time to time. They are the potential target group for conversion from parking to become regular transit users.



When asked why they do not ride Metro Rail or Bus to get to work, the following answers were given:



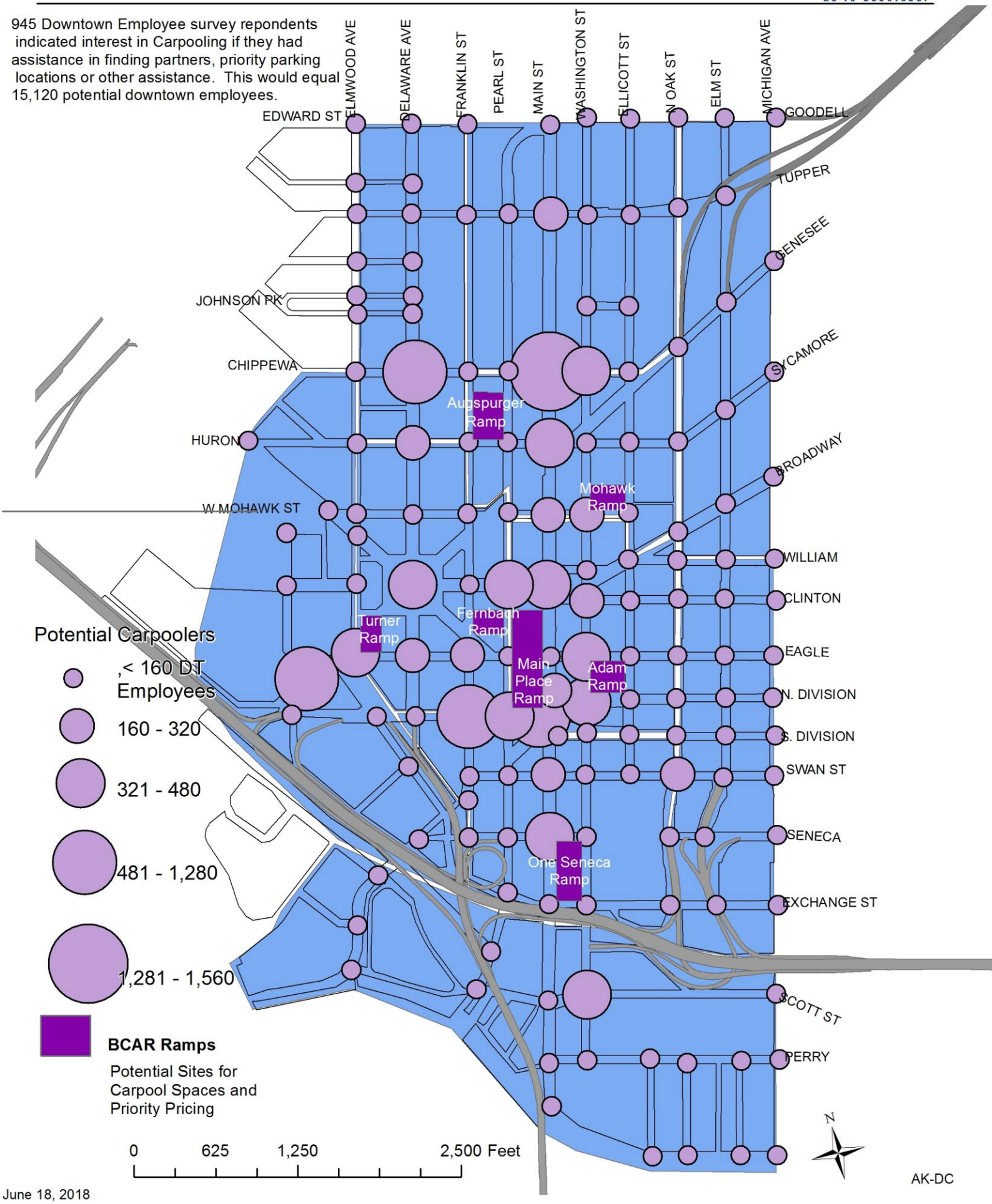
Could you Travel to Work by Carpool?

Based on survey responses, there are approximately 2,768 employees who currently carpool. 945 survey respondents indicated that they would be interested in Carpooling if they had someone to carpool with, or if they had assistance in finding partners with whom, to carpool, or priority parking spaces when arriving to Downtown by carpool. This could equal 15,120 potential downtown employees.

The following two maps show the work locations of those interested in carpooling and the home intersections of those same people.

Downtown Employee Survey Work Location
Respondents Who Would Carpool with Support

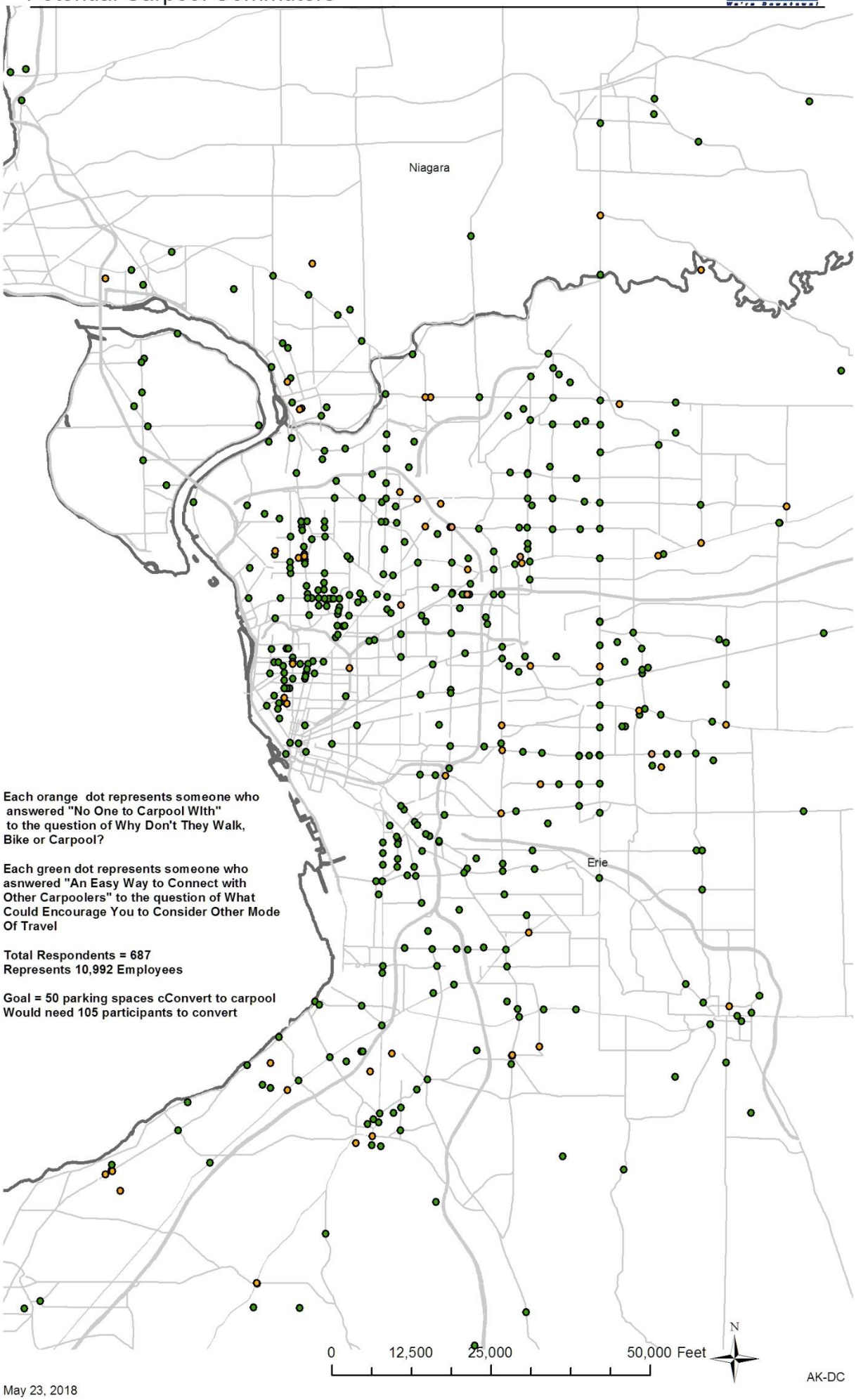
945 Downtown Employee survey repondents indicated interest in Carpooling if they had assistance in finding partners, priority parking locations or other assistance. This would equal 15,120 potential downtown employees.



June 18, 2018

AK-DC

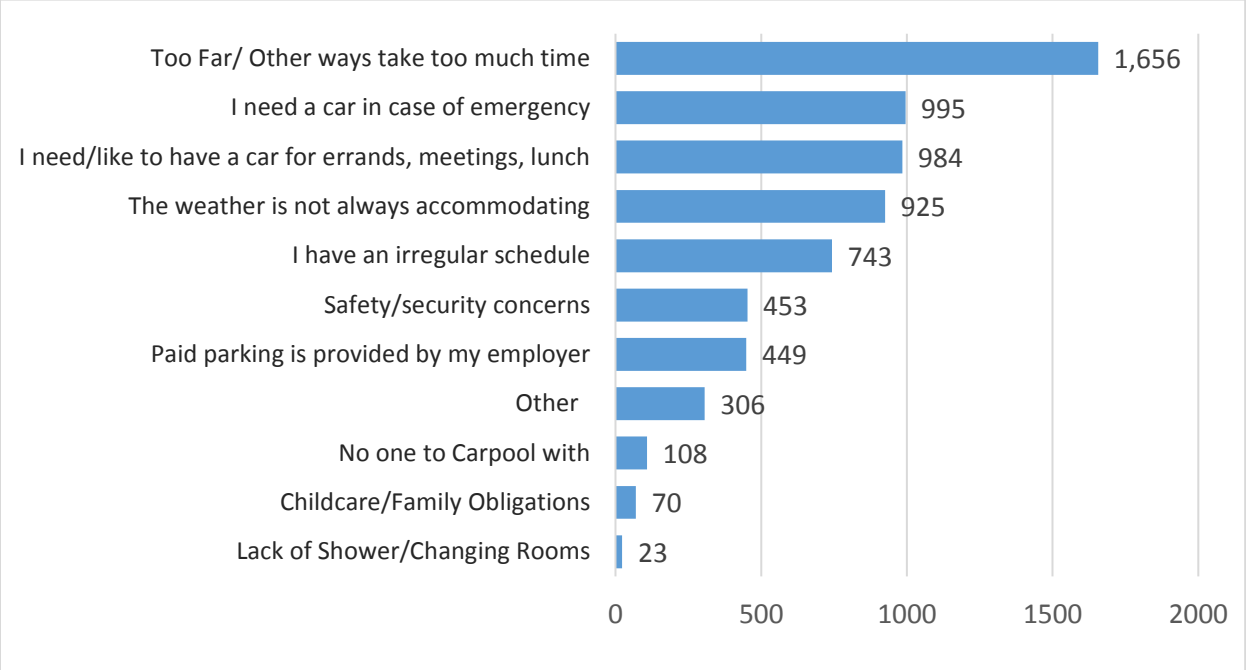
Downtown Employee Survey Respondents
Potential Carpool Commuters



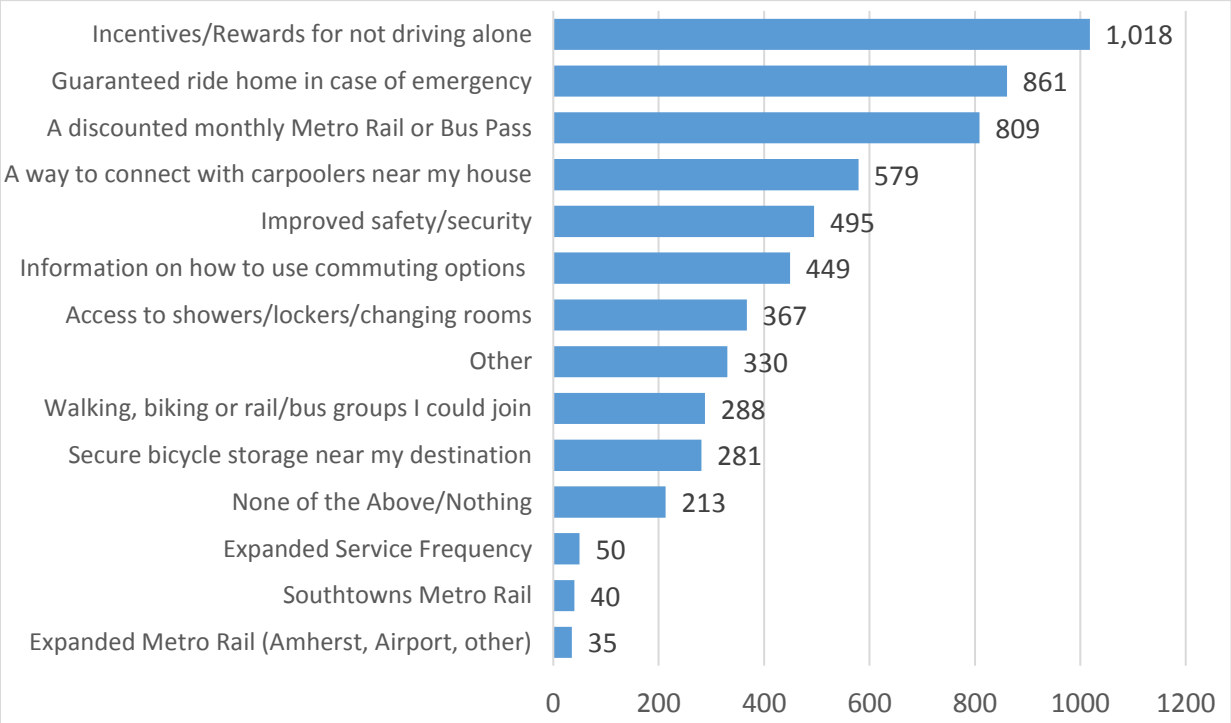
May 23, 2018

AK-DC

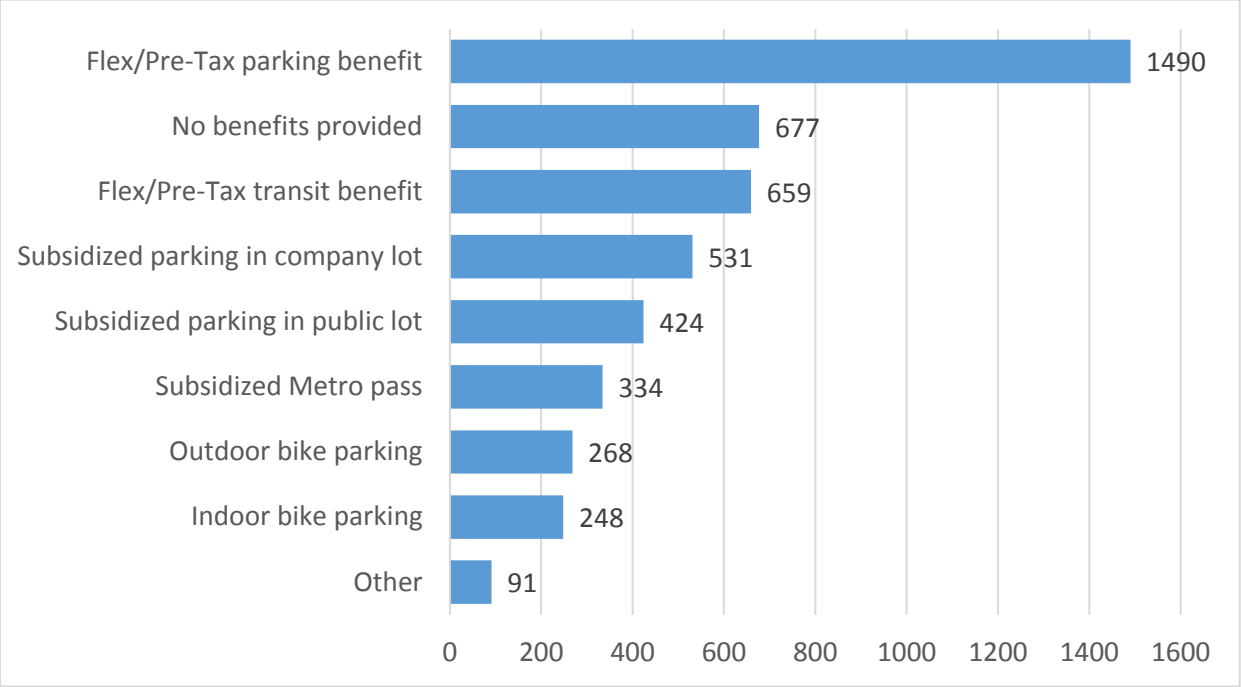
When asked why people do not walk, bike or carpool the following answers were given:



When asked what would encourage people to consider other modes of travel, the following answers were given:



When asked what transportation benefits were provided by employers, the following answers were given:



The mode split of those with parking and transit benefits was calculated. The availability of subsidized or pre-tax parking increased the likelihood of employees driving alone. For example, when subsidized parking was provided, 90% to 95% of the respondents drove alone to get to work, as opposed to 83% of the general population who answered this question. Similarly, when Metro passes are subsidized or available pre-tax to employees, the employees were more likely to use the bus or rail. The following tables show the mode split for selected transportation benefits.

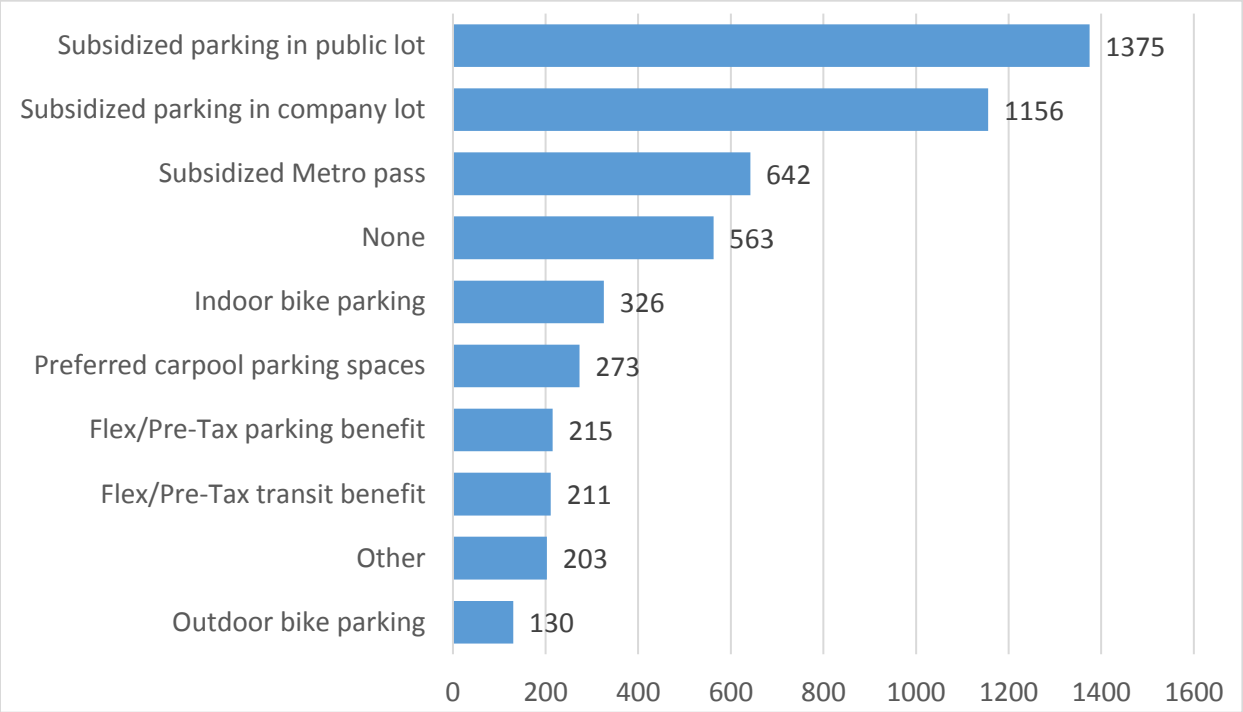
Mode	Everyone Who Answered Question – 3172 Responses	No Benefits Received - 666 Responses	Subsidized Parking in Public Lot (may have other answers) 434 Responses	Subsidized Parking in Public Lot as Only Benefit – 203 Responses	Subsidized Parking in Company Lot (may have other answers) 531 Responses	Subsidized parking in Company Lot as only benefit – 273 Responses	Flex/Pre Tax Parking Benefit (may have other answers) – 1490 Responses	Flex/Pre Tax Parking as Only Benefit- 763 Responses
Carpool	5%	6%	4%	2%	4%	3%	6%	5%
Drive Alone	83%	81%	83%	89%	90%	95%	86%	90%
Metro Bus	5%	5%	5%	3%	1%	0%	3%	1%
Metro Rail	4%	3%	3%	1%	2%	1%	3%	2%

Note: Highlighted cell shows where number is higher than the general population's response.

Mode	Everyone Who Answered Question – 3172 Responses	Subsidized Metro Pass (may have other answers) 334 Responses	Subsidized Metro Pass is only benefit – 67 Responses	Flex/Pre Tax Transit Benefit (May have other answers) -659 Responses	Flex/Pre Tax Transit only benefit --55 Responses
Bicycle	1%	0%	0%	1%	0%
Carpool	5%	4%	1%	7%	4%
Drive Alone	83%	65%	46%	73%	33%
Metro Bus	5%	16%	25%	8%	29%
Metro Rail	4%	11%	24%	7%	27%

Note: Highlighted cell shows where number is higher than the general population's response.

What asked what transportation benefits they would like their employer to provide, the following answers were given:



Recommendations

The guiding principle that shaped these recommendations is to maximize Downtown's potential as the center of our region, especially for employment, entertainment and civic services. This supports building occupancy including active storefronts and occupied upper floors, the growth of downtown as a place to live, the density of the Central Business District, and allow everyone to drive and park, ride the bus/train, bike or walk to take advantage of everything Downtown has to offer.

Some of the questions that guided the development of these recommendations include the following:

- How do we increase the percentage of Downtown patrons who are able to travel to Downtown without driving and parking?
- Can we increase or reprogram curb parking spaces to reduce demand for more off-street parking
- Are there effective techniques to encourage even more core employees to make use of the available periphery parking supply
- Would the City recover the costs of providing structured parking or non-parking access solutions with gains in tax revenue from currently vacant properties?
- Should the role of BCAR expand to include support for the goals of an overall Downtown Access System?

Identify 1,000+ New Ways to Access Downtown Buffalo.

The major study conclusion is that at least 1,000 additional ways to access downtown Buffalo will be necessary to facilitate expected development projects and to secure occupancy of vacant buildings.

Table: Specific Recommendations for 1,000 New Ways to Access Downtown:

	Recommendation Summary	**1,000 New Ways to Access Downtown**
1	Create new Curb Parking Spaces	200
2	Convert Parkers to Transit	200
3	Use Price to Move Core Parkers to Satellite Parking Facilities	200
4	Offer Joint Management of Surplus Private Parking Spaces	100
5	Offer a BCAR Carpool Incentive Program for a Net Loss of Monthly Parkers	50
6	Use Price to Encourage Periphery Parking. Dedicate Increased Fees to support the Access Program of Non-traditional Transportation/ Parking Choices	250

Recommendation Details

1. Create 200 new curb parking spaces
    A. Staff identified some 300 potential spaces to be considered for additional parking. City of Buffalo Public Works and Parking Departments are reviewing the list to identify which spaces can be put in place and which may not be feasible. Details are in Appendix M.
        - 288 proposed spaces are under review,
        - 14 have been approved,
        - 10 were found not possible by City Public Works.

2. Convert 200 Parkers to Transit. Specific program ideas include:
   A. Offer a Free Try out Transit Program to Downtown Employees who may not have experience riding Metro Bus or Rail.

      A limited version of this program was identified as eligible for funding under CMAQ and was included in a recent grant application by NFTA with GBNRTC. A reduced price metro pass ($35, a $40 deduction) in the month of May for participants who register for Air Quality Action Day updates in the Clean Air NY program. If this application is awarded, funding would be available for 500 participants to test lower cost transit during the three-year grant program.

   B. Market Try-Out Transit to BCAR parkers, for a two-month duration, offering no-risk return into the BCAR system. A similar program was effective in the late 1990s.

      A specific program for BCAR parkers would not be eligible for CMAQ funding as it targets a specific group. The month of May reduced price program described above can be marketed to BCAR monthly parkers along with the general population, and BCAR could allow any participants a no-risk trial, if desired. This idea can be pursued if the CMAQ grant is awarded.

   C. Encourage companies to offer pre-tax flex transit benefits to employees – Metro Perks program
      - Employees can save 10 – 37% of transit pass fees, depending on their personal tax rate. Most would save 22% or less, see page 98. Employers also save FICA on the tax savings.
      - The best timing for this option is after NFTA launches their new fare system, as logistics for purchase of Pre-Tax Metro passes are currently complicated.
   D. Expand Corporate Pass Program ($10 volume discount to employees from NFTA if matched by an equal or greater contribution by the employer.)
      - Employee transit passes would be reduced to $55 per month before additional pre-tax savings are subtracted. Most employees would purchase passes for $43 to $50 per month, depending on their personal tax rate.
      - Market to large employers (NFTA requires 25+ participants per company to obtain the volume discount)
      - Find an umbrella organization to package and offer discounts to smaller companies as the BNMC is doing for the medical campus
      - Cover umbrella organization out of pocket expenses as part of overall access support program

3. Encourage 200 cost sensitive parkers to relocate from BCAR core spaces to underutilized periphery parking spaces.
   - Requires funding to reduce parking fees sufficiently. The program offered by M&T Bank has attracted users at a rate of $19/month for KeyBank Arena ramp parking and $29/month for HarborCenter Ramp Parking, both less than posted monthly rates.
   - BCAR has allocated some funds to support satellite parking for 2018-9. Additional funding from the overall Access Program will be needed to reach the 200-car goal.
   - The future DL&W Metro Rail Station was thought to be a permanent solution for this option, but needs review now that a design concept is available. Current station access is oriented towards the foot of Main Street. This access path may be

too far from the parking supply at Illinois (KeyBank Arena Ramp), Mississippi, Baltimore and Columbia Streets to attract users.

- See page 95 for a discussion of use of Metro Rail for park and ride between satellite parking and employment.
- Options that are attractive because of price breaks or subsidy, or high customer service lose effectiveness if subsidies or customer service are discontinued. An example is the decline of ridership in the Park'n Go shuttle following increases in cost, and finally in loss of customer service when management transferred to the private sector.

4. Open an additional 100 publicly available off-street parking spaces by offering joint management and marketing of surplus, privately held parking, currently reserved for use by the owner or tenants.
    - Attempt to make matches with a private parking operator to manage
    - If not adopted by a private owner, this would require an organization to operate with administrative expenses to be covered by the overall Access Program.
    - See pages 137 and 138 for maps illustrating where available private parking spaces are located. Unfortunately, the 241 private spaces available in the core are secure inside parking or associated with housing, and are unlikely to be available for this use.

5. Create a Car Pool incentive program at BCAR facilities; offer the same program to private operators. Attract net loss of 50 cars.
    - A similar program offered by GoBNMC has been successful.
    - Incentives will be needed to make this system feasible, such as preferred parking locations near the exit, and a reduced parking fee from sharing one monthly parking rate, etc.
    - Will need to find ways to connect Carpoolers to those who live near them. There is a state website, but assistance through the parking operator will increase user friendliness.
    - Funds to support this program in BCAR ramps were included in GBNRTC's application under NFTA for CMAQ funding including signage and advertising for carpooling of five spaces at five BCAR ramps (Augspurger, Mohawk, Main Place, Fernbach and Turner), for a total of 25 priority carpool parking spaces. An option to expand is available if there is demand for more carpool spaces.
    - See page 126 for Carpool discussion and maps.
    - New York State has a Free rideshare website for potential Car poolers to find each other: https://511nyrideshare.org/web/statewide-511ny-rideshare .

6. Use higher prices at BCAR facilities to increase the price differential and encourage use of less expensive parking in the periphery and free up 250 core spaces. Reserve new revenue to support the Downtown Access Program. Specifically:
    - Revenue to support lower cost periphery parking program – an outside contribution is required to price satellite parking at a low enough rate to be attractive to price sensitive parkers – M&T satellite-parking pricing is a good example.
    - Support Try-Out Transit initiatives that are linked to BCAR monthly parkers
    - Provide Secure Bicycle parking options for frequent bike commuters – secure lock-up rooms or lockers

Additional Recommendations are made in response to the 2018 projected increase in the core parking deficit to -1,459 spaces:

1. Insure adequate short-term curb parking by: Considering enforcement techniques and balancing pricing for long and short duration curb parking to lessen incentives for illegally feeding meters. If curb rates are to be moderately increased, dedicate increased revenues to the overall downtown Access Program to encourage alternative transportation choices including Try Out Transit and Low-Cost Satellite parking. Consider if all-day meter rates adequately cover meter collection and maintenance expenses.

2. Construction of structured parking to replace smaller facilities or inefficient lot parking in key demand areas. Prepare for losses in publicly available parking expected when the Court Franklin lot is dedicated to City employees, and Main Place and Seneca One Towers ramps revert to private owners, and become dedicated to those facilities. See page 138.
    A. Preferred sites where new structured parking will support increased occupancy of vacant buildings:
        - 201 Ellicott
        - Mohawk Ramp Area
        - Court Street
    B. Interest in consideration/ study of building structured parking ramp spaces to support building occupancy and to free up low density parking lots for building development has been mentioned by:
        - BCAR – Concern regarding the prospective loss of 1,532 spaces in the publicly available system when Main Place and Seneca One Tower Ramps revert to the building owners and Court Franklin lot goes out of public service.
        - Ciminelli Development Planning group – The 210 Ellicott project motivates review of the downtown parking supply.
        - The Partnership's recent housing study supports use of current parking lots as development sites, and consolidating parking into fewer, more densely populated parking structures.
        - *Queen City Hub Strategic Plan for Downtown Buffalo* supports development of structured parking facilities to allow for development of surface parking lots.
    C. Funding for ramp construction is an issue. Some work is underway by BCAR to identify if private tax incentives may have a role.

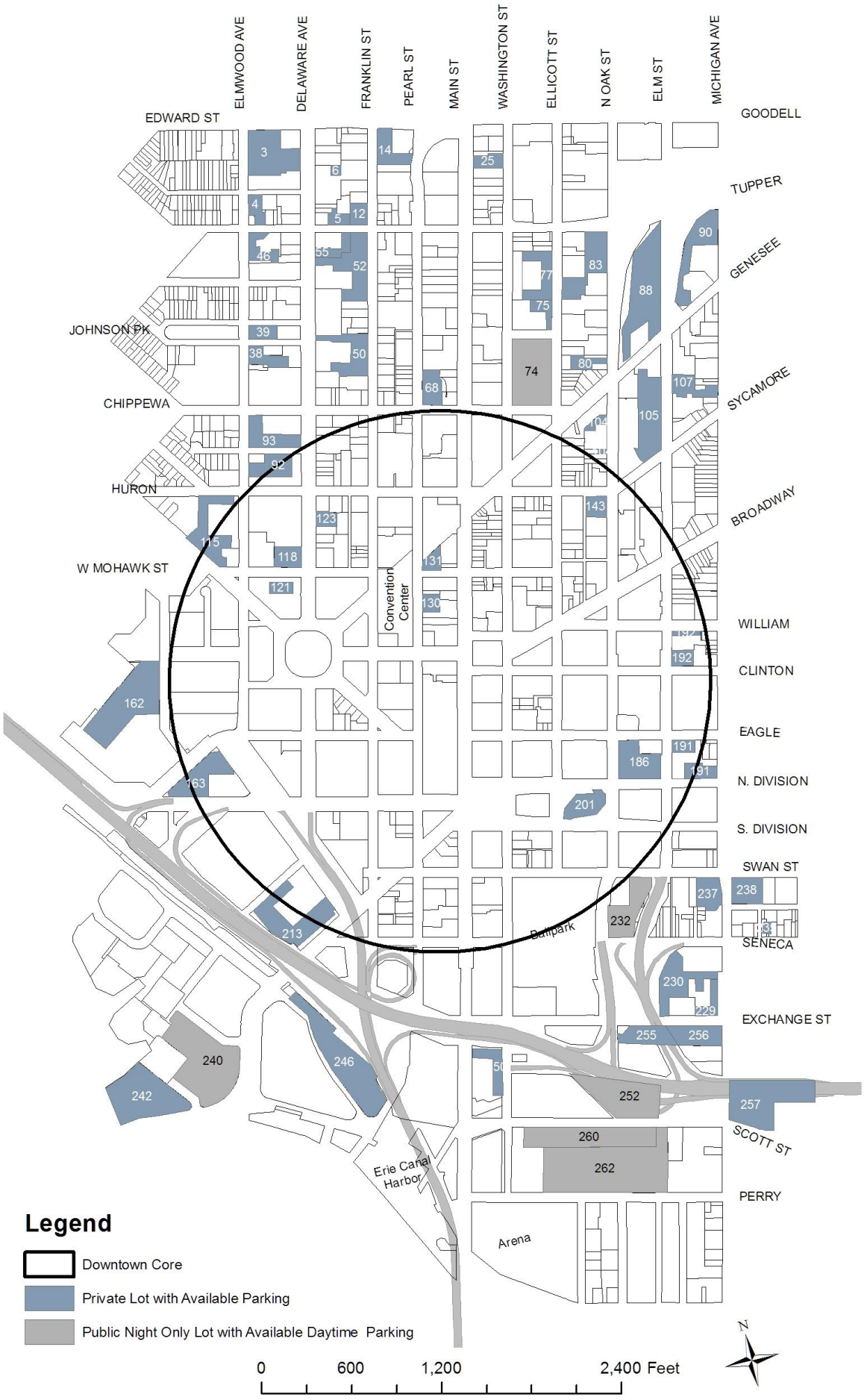
3. Create an Access Program Fund to support less traditional transportation/ parking choices. Dedicate increased revenues from increased public parking rates to these programs. (Builds on recommendation #6. Assumes management of a more comprehensive downtown access system.)
    A. Management/marketing and subsidy of periphery parking
    B. Try Out Transit pass program
    C. Convert BCAR parkers to transit with no-risk test passes
    D. Reduction of Carpool pass fee as an additional incentive to encourage carpooling at BCAR facilities.
    E. Umbrella agency for small businesses to participate in NFTA's corporate transit pass program

F. Management of surplus, privately held off-street parking
G. Provision of secure public bicycle storage in secure room/lock-ups or lockers to prevent bike theft for frequent riders.

4. Create a Shuttle system to encourage park and ride between the Canalside area at the south of Downtown, near KeyBank Arena and Main Street corridor employment. Currently employees who park in the KeyBank Center and HarborCenter ramps use Metro Rail to travel to their workplace in the Downtown Core. A shuttle program would offer an additional higher level of customer service similar to the Park'n go Shuttle of the early 2000s. This and a low parking fee will motivate more employees to overcome the inconvenience and extra time required to use a satellite parking facility.

Maps illustrating the potential for joint management of surplus private parking spaces follow.

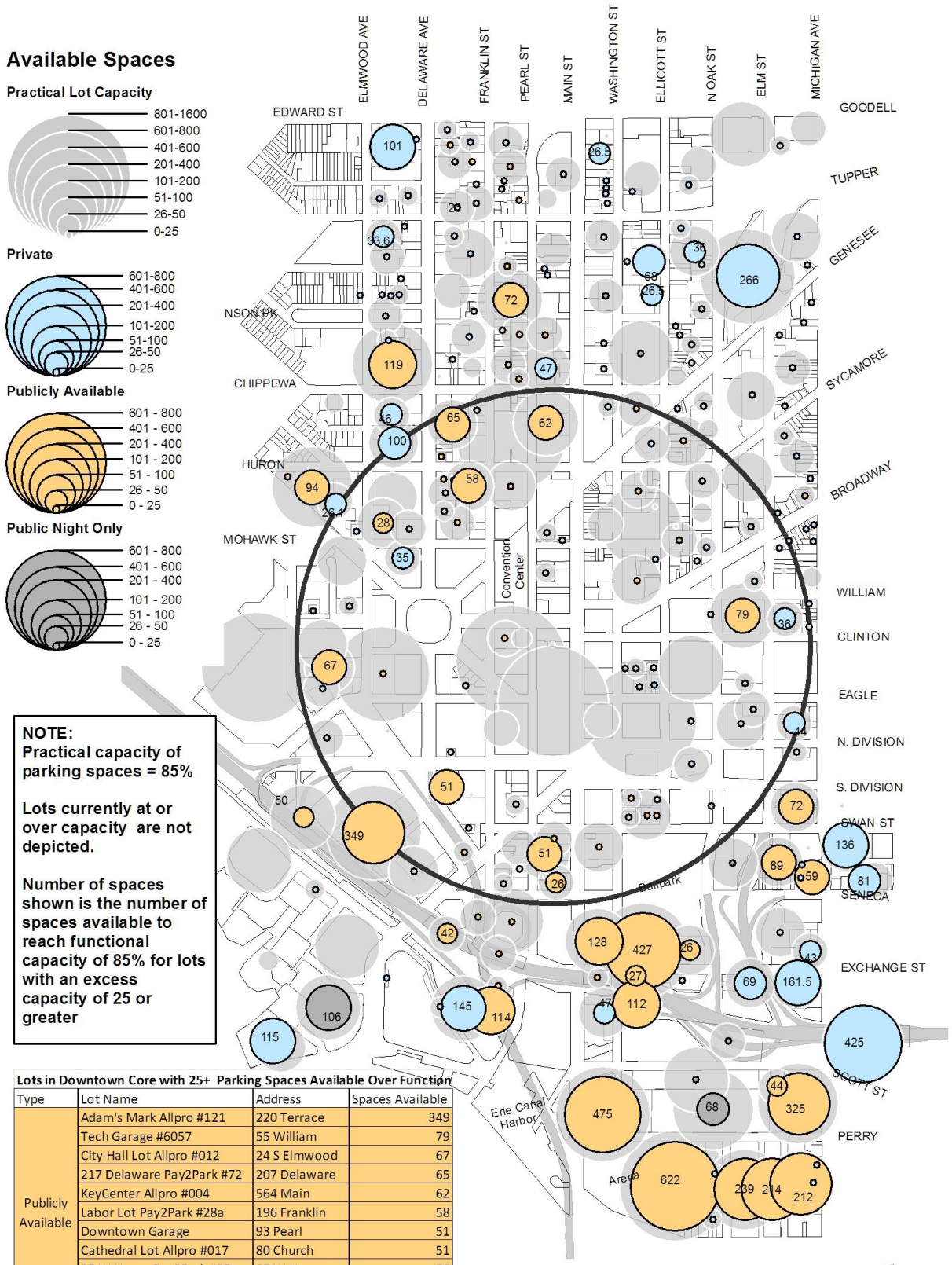
Private Lots with Available Parking
(25+ Unused Spaces)



December 5, 2017

AK - DC

2018 Current Off-Street Parking Spaces Available Over Functional Capacity



NOTE:
Practical capacity of parking spaces = 85%

Lots currently at or over capacity are not depicted.

Number of spaces shown is the number of spaces available to reach functional capacity of 85% for lots with an excess capacity of 25 or greater

Lots in Downtown Core with 25+ Parking Spaces Available Over Function

Type	Lot Name	Address	Spaces Available
Publicly Available	Adam's Mark Allpro #121	220 Terrace	349
	Tech Garage #6057	55 William	79
	City Hall Lot Allpro #012	24 S Elmwood	67
	217 Delaware Pay2Park #72	207 Delaware	65
	KeyCenter Allpro #004	564 Main	62
	Labor Lot Pay2Park #28a	196 Franklin	58
	Downtown Garage	93 Pearl	51
	Cathedral Lot Allpro #017	80 Church	51
	85 W Huron Pay2Park #25	85 W Huron	28
	Main Seneca Lot Allpro #002	234 Main	26
		Total Public	**836**
Private	Avant	184 Delaware	100
	Lofts @ 136	136 N Division	44
	Planing Mill	456 Michigan	36
	Federal Courthouse	2 Niagara Sq	35
	Niagara Center Lot	130 S Elmwood	26
		Total Private	**241**

There are an additional 205 spaces available to the public within the Downtown Core that are spread among 19 additional facilities

November 1, 2018

AK - DC

Access & Infrastructure Committee Members:

Buffalo Place wishes to thank the Access & Infrastructure Committee members for your time, thoughtfulness and assistance during this project.

Name	Affiliation
Craig Barber	All Pro Parking LLC
Keith Belanger	M&T Bank
Gary Bennett	Niagara Frontier Transit Authority
Justin Booth	GoBike Buffalo
Joe Buffamonte	New York State Department of Transportation
Chris Catanzaro	Erie Canal Harbor Development Corporation
Debra Chernoff	Buffalo Place, Inc
Mike Christner	New York State Department of Transportation
Mark Croce	Pay2Park
Bill Cusella	Buffalo Police Traffic Bureau
Kelly Dixon	Greater Buffalo Niagara Regional Transportation Council
Mike Farley	Buffalo Police – B District
Michael Finn	City of Buffalo Department of Public Works
Stephen Fitzmaurice	Buffalo Grand Hotel
Rebecca Gandour	City of Buffalo Office of Strategic Planning
Thomas George	Niagara Frontier Transit Authority
Joseph Gramaglia	Buffalo Police
Thea Hassan	Go Bike Buffalo
Ron Hayes	New York State Department of Transportation
Kevin Helfer	City of Buffalo Parking Enforcement Division
Sam Iraci	Buffalo Civic Auto Ramps
Angela Keppel	Buffalo Place, Inc
Bob Knoer	Knoer Group
Paul Kolkmeyer	Priam Enterprises LLC
Frederick Krajacic	M&T Bank
Bonnie Lockwood	Congressman Brian Higgins' Office
Stan Makowski	KeyBank Center/HarborCenter
Mike Manning	Main Place Liberty Group
Brandye Merriweather	Buffalo Urban Development Corporation
James Militello	JR Militello Realty, Inc

Name	Affiliation
Carl Montante, Jr.	Uniland Development Company
Tom Moore	New York State Thruway Authority
James Morell	Niagara Frontier Transportation Authority
Hal Morse	Greater Buffalo Niagara Regional Transportation Council
Katie O'Sullivan	Go Buffalo Niagara
William Paladino	Ellicott Development Company
Joe Puinno	Pay2Park
Steven Ranalli	Erie Canal Harbor Development Corporation
Mark Rountree	Erie County Department of Environment and Planning
James Sandoro	The Buffalo Transportation/Pierce Arrow Museum
Robert Schell	Pyramid Brokerage Company
Michael Schmand	Buffalo Place, Inc
Rick Serra	All Pro Parking LLC
W. Morgan Smith	Buffalo Place, Inc
Bill Smith	Buffalo Niagara Medical Campus
Kenneth Swanekamp	Department of Environment and Planning
Rocco Termini	Signature Development
Doug Tokarczyk	New York State Thruway Authority