

August 16, 2010

FOR INFORMATION

To: The Board of Governors of Exhibition Place

From: Dianne Young  
Chief Executive Officer

Subject: **Exhibition Place Parking Demand Analysis**

Summary:

At its meeting of July 23, 2010 the Board requested that staff provide a report outlining the amount of parking required for the operations within Exhibition Place. Staff has reviewed parking lot utilization over the past two years, with particular emphasis on major shows and on other dates when the core parking lots filled or were near full.

Although the amount of parking required for the operations within Exhibition Place has increased over the past few years, while supply has decreased slightly, it is the opinion of Exhibition Place staff that there is sufficient parking within easy access to the grounds to support the operations. However, it should be noted that not all of the spaces are within the control of Exhibition Place. Any decisions that may result in the loss of additional parking beyond what is identified in this report should be supported by measures that will secure alternate parking, or reduce the peak weekend parking demand through scheduling, or in the reduction of car trips per attendee.

Financial Implications:

There are no financial implications to this report.

Decision History:

At its meeting of July 23, 2010 the Board approved staff recommendations with respect to a Parking Rate Adjustment; and further, requested that staff provide a report outlining the amount of parking required for the operations within Exhibition Place.

At its meeting of April 23, 2010 the Board approved the 2010 Structure Plan which reads in part in Section 5.5 "*Conduct an analysis of parking inventory and service needs to ensure that there are sufficient parking facilities and open areas for service and marshalling to meet the present and future needs of trade and consumer shows, events and tenancies.*"

Issue Background:

Over the past 5 years Exhibition Place has created new opportunities for increased activity on the grounds, including long-term entertainment tenancies for underutilized buildings; construction of BMO Field; restoration and repurposing of the Coliseum and the Automotive Building; and refurbishment of the Better Living Centre. All of these developments, and future developments and expansion (ie the hotel), have the potential to bring additional cars onto the grounds. At the same time some developments result in a net loss of available parking during peak attendance days, typically Saturday afternoons.

### Comments:

This report focuses on parking demand for major shows outside of the annual CNE, recognizing that other factors such as the footprint of the Midway, and the availability of exterior lots such as Marilyn Bell Park will impact parking for the annual Fair. Obviously any reduction in the overall space available for the CNE Midway and for interior parking will reduce the net amount of parking for CNE attendees, but no attempt is made here to quantify that amount.

### Inventory:

Exhibition Place has just over 6,500 parking spaces available for year round use by tenants, show attendees, exhibitors and staff. Up to 500 of these spaces are used for the storage of trailers and campers during major shows. An additional 500 spaces are available for parking during the summer season, typically when core parking lots are being used to stage events. Overflow parking is also available at Ontario Place (1,700 spaces) and in public parking lots in Liberty Village just north of the GO Train Station (513 spaces in the City Parking lots). By comparison the International Centre has 5,000 parking spaces; the Toronto Congress Centre has 6,000 spaces; and the Metro Toronto Convention Centre has 1,700 spaces (plus access to other downtown parking).

### Occupancy:

In the 12 months ending July 2010 the core parking lots at Exhibition Place filled on 10 days, and exceeded 80% of capacity on an additional 7 days. During all of these days overflow parking was available at Ontario Place. On one day during the year (the second Saturday of the Royal Winter Fair) all lots, including Ontario Place, were near full. However, it is noted that during the RAWF up to 1,500 spaces at Exhibition Place and Ontario Place are occupied by horse trailers and campers. Although tenant activity in the west end of the Exhibition Place grounds is usually outside of peak times for shows, some space may be held in those lots to meet contractual obligations to tenants. When overflow cars are redirected to Ontario Place all Exhibition Place lots are deemed to be full.

### Propensity to Park:

An analysis of cars parked for major consumer and trade shows in 2008 and 2009, based on attendance figures provided by show management, shows that consumer shows attracted on average 3.5 cars per 10 attendees, and trade shows attracted 7 cars per 10 attendees. When exhibitor cars are added, the total number of cars parked per 10 attendees increases to 4 for consumer shows and 9 for trade shows. The RAWF has not been included in the analysis due to the high number of attendees who arrive by school bus during weekdays. Two consumer shows that were at Exhibition Place in 2009, but are no longer here, had much lower car ratios at 1.9 and 2.5 cars per 10 attendees.

When propensity to park is taken in conjunction with peak occupancy of parking lots, it is observed that space turnover is about 1.5 on a Saturday, and 1.4 on a Sunday. This is consistent with anecdotal evidence that lots fill at noon on peak days, and spaces become available one or two hours later. As expected, peak occupancy for consumer shows occurs more often, and for extended periods, when a show occupies the entire building versus several shows each occupying

a smaller space. This is the result of attendees spending more time on the show floor, and hence in the parking lot, at a large show such as the Home Show.

#### Future Planning:

This parking demand analysis provides some insight into current parking patterns at Exhibition Place, and offer areas of opportunity in future planning, consistent with the provisions of the 2010 Structure Plan. Some highlights are as follows:

- Overall, with the existing availability of parking areas at Ontario Place during the trade show season, there is no time when both the Exhibition Place and Ontario Place parking lots are completely full. While it may not be as convenient for our attendees to park at Ontario Place, we have not received many complaints as the Ontario Place parking rates are typically lower during the trade show season. However, if we had to depend more on the Ontario Place lots in the future, we could look at ways of making this easier with drop-off areas or shuttle transportation. The status of this comment though may change depending on the result of the future uses exercise that Ontario Place has launched.
- Parking lots currently reach capacity on 10 days per year. During construction of the hotel on the site of parking Lot 1, the 700 space reduction in available parking spaces will bring that number to 17. When the hotel opens this number will decrease with the new supply of hotel parking, providing guests using the hotel garage are the same guests who would have used a car to attend the show. In addition, since the spaces in the garage exceed the hotel needs on that day which is likely given that hotel will only have 325 guest rooms, there will be parking spaces available for show attendees. However, it is important that any future development plans for the second phase of the hotel or the expansion of the trade centre address additional underground parking to replace surface lot parking.
- The extension of Dufferin Street south to Lakeshore Boulevard West as shown in the 2010 Structure Plan, and the proposed extension of the Harbourfront LRT westward to Dufferin Street both have the potential to reduce parking supply in the west end of the grounds and replacement parking will need to be considered to service tenants in that sector.
- Both consumer shows and trade shows currently attract a very high number of cars per attendee. Consumer shows (at 3.5 cars per 10 attendees) attendees travel by car is more than twice that of attendees at a regular season soccer game at BMO Field, or at a hockey game at Ricoh. Trade shows (at 7 cars per 10 attendees). This suggests that not only are out-of-town visitors arriving in single occupant cars but those staying in local hotels may also be driving to the venue. These dynamics need to be considered when renting several buildings on a Saturday and Sunday. For example, booking a trade show on a Saturday or Sunday against a major consumer show, could place a strain on the parking supply. There is also an opportunity to influence peak parking demand through the timing of show features and through weekend parking pricing. This analysis also speaks to the need to actively engage local transit authorities to ensure they understand the needs of the trade and consumer show industry and to develop infrastructure and operating plans to address this sector.
- During major shows the Gore parking lot is used at no charge for dead storage of trailers, and reduced rate camper parking is permitted in Lot 2. So long as peak day overflow parking is available at Ontario Place this is an acceptable practice as the walking distance from Ontario Place for attendees is no more than from the Gore lot. However if parking demand increases

on the Grounds, or if any future development at Ontario Place reduces the amount of surplus parking during the Exhibition Place show season, then that practice should be revisited. Other facilities, such as the MTCC, that have less available parking spaces than Exhibition Place have had to address the issue of “offsite dead storage” and this may have to be part of the future considerations for Exhibition Place.

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