2013 GLOBAL PARKING SURVEY

Report on Surveys Conducted by the Global Parking Association Leaders

GLOBAL PARKING ASSOCIATION LEADERS SUMMIT 2013 DUBLIN

Presented at 16th EPA Congress
September 11, 2013

What is GPALS?

GLOBAL PARKING ASSOCIATION LEADERS SUMMIT 2013 DUBLIN

The Global Parking Association Leaders Summit (GPALS) is an annual gathering of parking association leaders from around the world. Established by the International Parking Institute in 2012, the GPALs Summit is a unique opportunity for those leaders to gather, share information, and learn from each other in a friendly forum that encourages discussion and dialogue on a wide range from topics.

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17 GPALs Associations

1. Parking Association of Australia Inc.
2. Parking Association of Brazil (Abrapark)
3. The British Parking Association
4. Canadian Parking Association
5. Croatian Parking Association
6. European Parking Association
7. Finnish Parking Association
8. German Parking Association
9. International Parking Institute
10. Irish Parking Association
11. Israel Parking Association
12. Italian Parking Association (AIPARK)
13. Japan Parking Association
14. New Zealand Parking Association
15. Norwegian Parking Association
16. Parking Association of Spain (ASESGA)
17. Swedish Parking Association

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13 Survey Participants

1. Parking Association of Australia Inc.
2. Parking Association of Brazil (Abrapark)
3. The British Parking Association
4. Canadian Parking Association
5. European Parking Association
6. Finnish Parking Association
7. German Parking Association
8. International Parking Institute
9. Irish Parking Association
10. Japan Parking Association
11. Norwegian Parking Association
12. Parking Association of Spain (Asesga)
13. Swedish Parking Association

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Background

- **Based on IPI's *Emerging Trends In Parking* Survey**
  - Conducted annually – Statistically valid

- **Research subcommittee adapted for GPALs:**
  - **Keith Gavin**, Ireland
  - **Nick Lester**, EPA
  - **Patrick Troy**, UK
  - **Larry Schneider**, Australia
  - **Carole Whitehorne**, Canada
  - **Andre Piccoli**, Brazil
  - **Helen Sullivan**, USA
  - **Giuliano Mingardo**, Netherlands

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Background

- **Online survey of 10 questions**
- **Each association surveyed their own members/stakeholders**
- **Fielded during July-August 2013**
- **Each country's parking association to publicize their own study results**
- **Many issues/perceptions in common; some differences**

Disclaimer

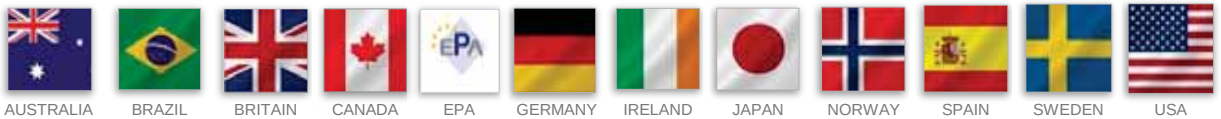
- **First year**
- **Excellent collaborative effort**
- **Individual country surveys vary widely**
- **Market research firm assisted**
- **“Snapshot,” not a statistically projectable study**

Question 1: "From the list below, please select a maximum of FIVE trends you believe are having the greatest effect on the parking industry or profession."

1 Most Impactful Trends (1 of 2)

Move toward innovative technology to improve parking management (i.e. sensor technology, mobile phones, etc.)

Demand for electronic (cashless) payment



Need for more collaboration between parking, transportation, and decision-makers

Need for green/sustainable solutions

Determine parking's role and responsibilities to accommodate electric vehicles

Demand from politicians/businesses for inexpensive or free parking

Parking taxes and levies to support sustainable mobility practices (i.e. cycling and transit)

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1 Most Impactful Trends (2 of 2)

Need to improve facility security


GERMANY


JAPAN


SWEDEN

Move toward more public-private partnerships


BRAZIL


FINLAND


SPAIN

Resistance to enforcement operations from motorists/politicians


BRITAIN


IRELAND

Need for improved visual appeal/aesthetics of parking facilities


GERMANY


SPAIN

Parking taxes and levies to support infrastructure development


CANADA

Shortage of qualified employees


BRAZIL

Demand for more transparency about the use of parking revenue

EPA

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1 Most Impactful Trends - Ranking

	AUSTRALIA	BRAZIL	BRITAIN	CANADA	EPA	FINLAND	GERMANY	IRELAND	JAPAN	NORWAY	SPAIN	SWEDEN	USA
Innovative Technology	1	1	1	1	1	1*	2	1	In top 5	2	1	1*	1
Electronic Payment	3	2	4*	2	3	-	4*	4	In top 5	2*	5*	1*	2
Need for Collaboration	2	-	2	3	2	2*	-	5	-	1	2	3	3
Sustainable Solutions	4	5	-	4	4	1*	-	-	In top 5	-	-	4	-
Accommodating EVs	-	-	-	-	-	-	4*	-	In top 5	4	3*	-	-
Inexpensive/Free Parking	-	-	3	-	-	2*	-	3	-	-	5*	-	-
Taxes for Sustainable Mobility	5	-	-	5*	-	2*	-	-	-	4*	-	-	-
Improve Facility Security	-	-	-	-	-	-	1	-	In top 5	-	-	5	-
Public-private Partnerships	-	4	-	-	-	2*	-	-	-	-	5*	-	-
Resistance to Enforcement	-	-	4	-	-	-	-	2	-	-	-	-	-
Improved Visual Appearance	-	-	-	-	-	-	3	-	-	-	3*	-	-
Infrastructure Development	-	-	-	5*	-	-	-	-	-	-	-	-	-
Shortage Qualified Employees	-	3	-	-	-	-	-	-	-	-	-	-	-
Greater Transparency	-	-	-	-	5	-	-	-	-	-	-	-	-

*Indicates a tie

GLOBAL PARKING ASSOCIATION LEADERS SUMMIT 2013 DUBLIN

1 Most Impactful Trends - Ranking

	AUSTRALIA	BRAZIL	BRITAIN	CANADA	EPA	FINLAND	GERMANY	IRELAND	JAPAN	NORWAY	SPAIN	SWEDEN	USA
Innovative Technology	1	1	1	1	1	1*	2	1	In top 5	2	1	1*	1
Electronic Payment	3	2	4*	2	3	-	4*	4	In top 5	2*	5*	1*	2
Need for Collaboration	2	-	2	3	2	2*	-	5	-	1	2	3	4
Sustainable Solutions	4	5	-	4	4	1*	-	-	In top 5	-	-	4	-
Accommodating EVs	-	-	-	-	-	-	4*	-	In top 5	5	3*	-	-
Inexpensive/Free Parking	-	-	3	-	-	2*	-	3	-	-	5*	-	-
Taxes for Sustainable Mobility	5	-	-	5*	-	2*	-	-	-	4*	-	-	-
Improve Facility Security	-	-	-	-	-	-	1	-	In top 5	-	-	5	-
Public-private Partnerships	-	4	-	-	-	2*	-	-	-	-	5*	-	-
Resistance to Enforcement	-	-	4	-	-	-	-	2	-	-	-	-	-
Improved Visual Appearance	-	-	-	-	-	-	3	-	-	-	3*	-	-
Infrastructure Development	-	-	-	5*	-	-	-	-	-	-	-	-	-
Shortage Qualified Employees	-	3	-	-	-	-	-	-	-	-	-	-	-
Greater Transparency	-	-	-	-	5	-	-	-	-	-	-	-	-

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Sustainable Solutions	4	5	-	4	4	1*	-	-	In top 5	-	-	4	-
Accommodating EVs	-	-	-	-	-	-	4*	-	In top 5	5	3*	-	-
Inexpensive/Free Parking	-	-	3	-	-	2*	-	3	-	-	5*	-	-
Taxes for Sustainable Mobility	5	-	-	5*	-	2*	-	-	-	4*	-	-	-
Improve Facility Security	-	-	-	-	-	-	1	-	In top 5	-	-	5	-
Public-private Partnerships	-	4	-	-	-	2*	-	-	-	-	5*	-	-
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Greater Transparency	-	-	-	-	5	-	-	-	-	-	-	-	-

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Sustainable Solutions	4	5	-	4	4	1*	-	-	In top 5	-	-	4	-
Accommodating EVs	-	-	-	-	-	-	4*	-	In top 5	5	3*	-	-
Inexpensive/Free Parking	-	-	3	-	-	2*	-	3	-	-	5*	-	-
Taxes for Sustainable Mobility	5	-	-	5*	-	2*	-	-	-	4*	-	-	-
Improve Facility Security	-	-	-	-	-	-	1	-	In top 5	-	-	5	-
Public-private Partnerships	-	4	-	-	-	2*	-	-	-	-	5*	-	-
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Sustainable Solutions	4	5	-	4	4	1*	-	-	In top 5	-	-	4	-
Accommodating EVs	-	-	-	-	-	-	4*	-	In top 5	4*	3*	-	-
Inexpensive/Free Parking	-	-	3	-	-	2*	-	3	-	-	5*	-	-
Taxes for Sustainable Mobility	5	-	-	5*	-	2*	-	-	-	4*	-	-	-
Improve Facility Security	-	-	-	-	-	-	1	-	In top 5	-	-	5	-
Public-private Partnerships	-	4	-	-	-	2*	-	-	-	-	5*	-	-
Resistance to Enforcement	-	-	4*	-	-	-	-	2	-	-	-	-	-
Improved Visual Appearance	-	-	-	-	-	-	3	-	-	-	3*	-	-
Infrastructure Development	-	-	-	5*	-	-	-	-	-	-	-	-	-
Shortage Qualified Employees	-	3	-	-	-	-	-	-	-	-	-	-	-
Greater Transparency	-	-	-	-	5	-	-	-	-	-	-	-	-

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1 Most Impactful Trends - Ranking

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Inexpensive/Free Parking	-	-	3	-	-	2*	-	3	-	-	5*	-	-
Taxes for Sustainable Mobility	5	-	-	5*	-	2*	-	-	-	4*	-	-	-
Improve Facility Security	-	-	-	-	-	-	1	-	In top 5	-	-	5	-
Public-private Partnerships	-	4	-	-	-	2*	-	-	-	-	5*	-	-
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Shortage Qualified Employees	-	3	-	-	-	-	-	-	-	-	-	-	-
Greater Transparency	-	-	-	-	5	-	-	-	-	-	-	-	-

*Indicates a tie

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Question 2: "Thinking about the benefits of sustainability to the environment, which of the following do you believe has the greatest potential to improve sustainability in parking? (Top 3 choices)"
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2013 DUBLIN

2 What Has Greatest Potential to Improve Sustainability?

On-and-off street guidance systems that enable drivers to find parking faster, reducing carbon emissions

Encouraging alternative travel through availability of bike storage, car share/bike share, access to transit

Energy-efficient lighting

Increased use of transportation demand management (i.e. pricing, etc.)

Installing renewable energy technology (solar, wind, etc.)

Facilitating electric vehicles

Automating payment processes

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2 What Has Greatest Potential to Improve Sustainability?

	AUSTRALIA	BRAZIL	BRITAIN	CANADA	EPA	FINLAND	GERMANY	IRELAND	JAPAN	NORWAY	SPAIN	SWEDEN	USA
On-and-off street guidance systems that enable drivers to find parking faster, reducing carbon emissions	1	2	1*	1	1	1	2*	1	In top 3	2*	1*	1*	1
Encouraging alternative travel through availability of bike storage, car share/bike share, access to transit	2	3	1*	2	-	2*	2*	2	-	1	-	2*	3
Energy-efficient lighting	3	1	-	-	2	-	1	3*	In top 3	-	1*	2*	2
Increased use of transportation demand management (i.e. pricing, etc.)	-	-	3	3	-	2*	-	-	-	2*	-	1*	-
Installing renewable energy technology (solar, wind, etc.)	-	-	-	-	-	2*	-	3*	-	-	2*	-	-
Facilitating electric vehicles	-	-	-	-	-	2*	-	-	-	-	2*	-	-
Automating payment processes	-	-	-	-	3	-	-	-	-	-	-	-	-

*Indicates a tie

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2 What Has Greatest Potential to Improve Sustainability?

	AUSTRALIA	BRAZIL	BRITAIN	CANADA	EPA	FINLAND	GERMANY	IRELAND	JAPAN	NORWAY	SPAIN	SWEDEN	USA
On-and-off street guidance systems that enable drivers to find parking faster, reducing carbon emissions	1	2	1*	1	1	1	2*	1	In top 3	2*	1*	1*	1
Encouraging alternative travel through availability of bike storage, car share/bike share, access to transit	2	3	1*	2	-	2*	2*	2	-	1	-	2*	3
Energy-efficient lighting	3	1	-	-	2	-	1	3*	In top 3	-	1*	2*	2
Increased use of transportation demand management (i.e. pricing, etc.)	-	-	3	3	-	2*	-	-	-	2*	-	1*	-
Installing renewable energy technology (solar, wind, etc.)	-	-	-	-	-	2*	-	3*	-	-	2*	-	-
Facilitating electric vehicles	-	-	-	-	-	2*	-	-	-	-	2*	-	-
Automating payment processes	-	-	-	-	3	-	-	-	-	-	-	-	-

*Indicates a tie

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2 What Has Greatest Potential to Improve Sustainability?

	AUSTRALIA	BRAZIL	BRITAIN	CANADA	EPA	FINLAND	GERMANY	IRELAND	JAPAN	NORWAY	SPAIN	SWEDEN	USA
On-and-off street guidance systems that enable drivers to find parking faster, reducing carbon emissions	1	2	1*	1	1	1	2*	1	In top 3	2*	1*	1*	1
Encouraging alternative travel through availability of bike storage, car share/bike share, access to transit	2	3	1*	2	-	2*	2*	2	-	1	-	2*	3
Energy-efficient lighting	3	1	-	-	2	-	1	3*	In top 3	-	1*	2*	2
Increased use of transportation demand management (i.e. pricing, etc.)	-	-	3	3	-	2*	-	-	-	2*	-	1*	-
Installing renewable energy technology (solar, wind, etc.)	-	-	-	-	-	2*	-	3*	-	-	2*	-	-
Facilitating electric vehicles	-	-	-	-	-	2*	-	-	-	-	2*	-	-
Automating payment processes	-	-	-	-	3	-	-	-	-	-	-	-	-

*Indicates a tie

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2 What Has Greatest Potential to Improve Sustainability? - Ranking

	AUSTRALIA	BRAZIL	BRITAIN	CANADA	EPA	FINLAND	GERMANY	IRELAND	JAPAN	NORWAY	SPAIN	SWEDEN	USA
On-and-off street guidance systems that enable drivers to find parking faster, reducing carbon emissions	1	2	1*	1	1	1	2*	1	In top 3	2*	1*	1*	1
Encouraging alternative travel through availability of bike storage, car share/bike share, access to transit	2	3	1*	2	-	2*	2*	2	-	1	-	2*	3
Energy-efficient lighting	3	1	-	-	2	-	1	3*	In top 3	-	1*	2*	2
Increased use of transportation demand management (i.e. pricing, etc.)	-	-	3	3	-	2*	-	-	-	2*	-	1*	-
Installing renewable energy technology (solar, wind, etc.)	-	-	-	-	-	2*	-	3*	-	-	2*	-	-
Facilitating electric vehicles	-	-	-	-	-	2*	-	-	-	-	2*	-	-
Automating payment processes	-	-	-	-	3	-	-	-	-	-	-	-	-

*Indicates a tie

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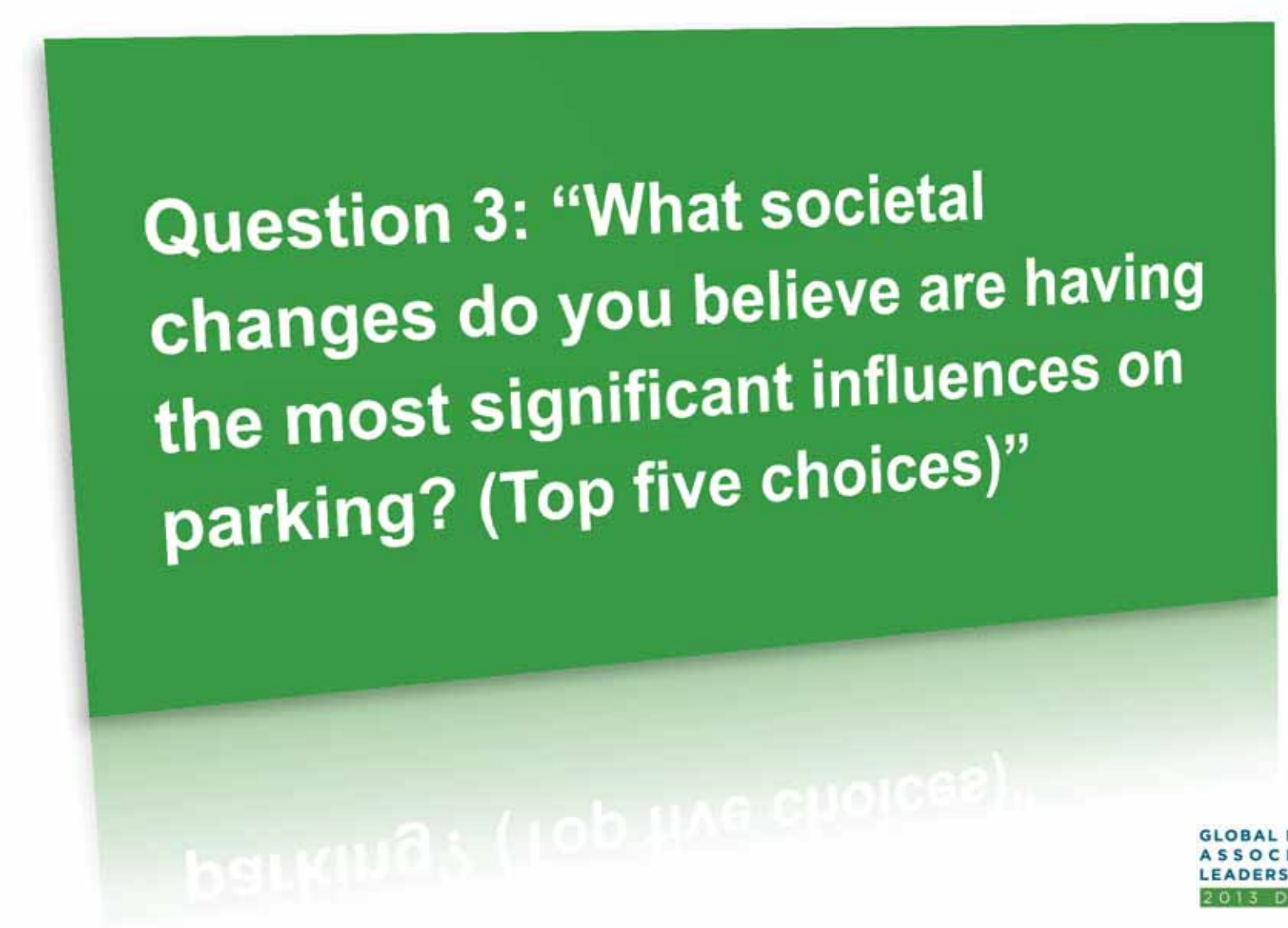

Question 3: “What societal changes do you believe are having the most significant influences on parking? (Top five choices)”

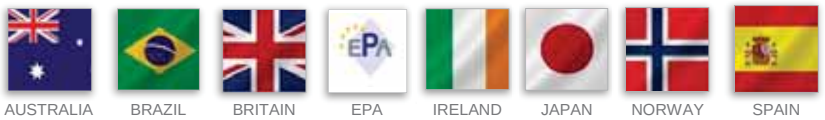
3 Most Influential Societal Changes on Parking (1 of 2)

Increased traffic congestion

Increased fuel prices

Increased use of mass transit for commuting/traveling

Economic pressures on retailers, particularly in main/high streets and traditional town centers*



Focus on environment and sustainability

Desire for more liveable, walkable communities

Aging population

*Not included in USA survey

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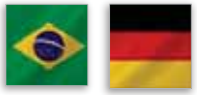
3 Most Influential Societal Changes on Parking (2 of 2)

Increased migration from suburban to urban areas


BRAZIL FINLAND NORWAY SWEDEN

Concerns about safety


BRAZIL GERMANY

Increased use of bicycles for commuting/travelling


BRITAIN IRELAND

More aggressive lobbying from drivers/motorists


BRITAIN SPAIN

Increased work flexibility so parking demand is spaced out


IRELAND SPAIN

Increased number of alternative fuel vehicles on the road


SWEDEN

Desire for more aesthetic design


SWEDEN

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3 Most Influential Societal Changes on Parking - Ranking

	AUSTRALIA	BRAZIL	BRITAIN	CANADA	EPA	FINLAND	GERMANY	IRELAND	JAPAN	NORWAY	SPAIN	SWEDEN	USA
Increased Traffic Congestion	1	2	2	1	1	4*	2	4	-	3*	3*	-	1
Increased Fuel Prices	2	-	3	3	3	-	3	2	In top 5	-	1*	-	2
Increased use of mass transit	3*	-	-	5	4*	4*	-	5*	In top 5	3*	3*	5*	-
Economic pressures	3*	4	1	-	2	-	-	1	In top 5	3*	1*	-	Not asked in USA survey
Focus on sustainability	5	5	-	2	4*	1*	-	-	-	1*	-	1	4*
Desire for walkable communities	-	-	-	4	-	1*	4*	5*	In top 5	1*	-	2*	3
Aging population	-	-	-	-	-	1*	1	-	In top 5	-	-	-	5
Increased migration to urban areas	-	3	-	-	-	4*	-	-	-	3*	-	5*	-
Concerns about safety	-	1	-	-	-	-	4*	-	-	-	-	-	-
Increased use of bicycles	-	-	5	-	-	-	-	3	-	-	-	-	-
Aggressive lobbying from motorists	-	-	4	-	-	-	-	-	-	-	3*	-	-
Increased work flexibility	-	-	-	-	-	-	-	5*	-	-	3*	-	-
Increased number of alternative fuel vehicles	-	-	-	-	-	-	-	-	-	-	-	2*	-
Desire for more aesthetic design	-	-	-	-	-	-	-	-	-	-	-	2*	-

*Indicates a tie

GLOBAL PARKING ASSOCIATION LEADERS SUMMIT 2013 DUBLIN

3 Most Influential Societal Changes on Parking - Ranking

	AUSTRALIA	BRAZIL	BRITAIN	CANADA	EPA	FINLAND	GERMANY	IRELAND	JAPAN	NORWAY	SPAIN	SWEDEN	USA
Increased Traffic Congestion	1	2	2	1	1	4*	2	4	-	3*	3*	-	1
Increased Fuel Prices	2	-	3	3	3	-	3	2	In top 5	-	1*	-	2
Increased use of mass transit	3*	-	-	5	4*	4*	-	5*	In top 5	3*	3*	5*	-
Economic pressures	3*	4	1	-	2	-	-	1	In top 5	3*	1*	-	Not asked in USA survey
Focus on sustainability	5	5	-	2	4*	1*	-	-	-	1*	-	1	4*
Desire for walkable communities	-	-	-	4	-	1*	4*	5*	In top 5	1*	-	2*	3
Aging population	-	-	-	-	-	1*	1	-	In top 5	-	-	-	5
Increased migration to urban areas	-	3	-	-	-	4*	-	-	-	3*	-	5*	-
Concerns about safety	-	1	-	-	-	-	4*	-	-	-	-	-	-
Increased use of bicycles	-	-	5	-	-	-	-	3	-	-	-	-	-
Aggressive lobbying from motorists	-	-	4	-	-	-	-	-	-	-	3*	-	-
Increased work flexibility	-	-	-	-	-	-	-	5*	-	-	3*	-	-
Increased number of alternative fuel vehicles	-	-	-	-	-	-	-	-	-	-	-	2*	-
Desire for more aesthetic design	-	-	-	-	-	-	-	-	-	-	-	2*	-

*Indicates a tie

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3 Most Influential Societal Changes on Parking - Ranking

	AUSTRALIA	BRAZIL	BRITAIN	CANADA	EPA	FINLAND	GERMANY	IRELAND	JAPAN	NORWAY	SPAIN	SWEDEN	USA
Increased Traffic Congestion	1	2	2	1	1	4*	2	4	-	3*	3*	-	1
Increased Fuel Prices	2	-	3	3	3	-	3	2	In top 5	-	1*	-	2
Increased use of mass transit	3*	-	-	5	4*	4*	-	5*	In top 5	3*	3*	5*	-
Economic pressures	3*	4	1	-	2	-	-	1	In top 5	3*	1*	-	Not asked in USA survey
Focus on sustainability	5	5	-	2	4*	1*	-	-	-	1*	-	1	4*
Desire for walkable communities	-	-	-	4	-	1*	4*	5*	In top 5	1*	-	2*	3
Aging population	-	-	-	-	-	1*	1	-	In top 5	-	-	-	5
Increased migration to urban areas	-	3	-	-	-	4*	-	-	-	3*	-	5*	-
Concerns about safety	-	1	-	-	-	-	4*	-	-	-	-	-	-
Increased use of bicycles	-	-	5	-	-	-	-	3	-	-	-	-	-
Aggressive lobbying from motorists	-	-	4	-	-	-	-	-	-	-	3*	-	-
Increased work flexibility	-	-	-	-	-	-	-	5*	-	-	3*	-	-
Increased number of alternative fuel vehicles	-	-	-	-	-	-	-	-	-	-	-	2*	-
Desire for more aesthetic design	-	-	-	-	-	-	-	-	-	-	-	2*	-

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Desire for walkable communities	-	-	-	4	-	1*	4*	5*	In top 5	1*	-	2*	3
Aging population	-	-	-	-	-	1*	1	-	In top 5	-	-	-	5
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Concerns about safety	-	1	-	-	-	-	4*	-	-	-	-	-	-
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Increased number of alternative fuel vehicles	-	-	-	-	-	-	-	-	-	-	-	2*	-
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Aging population	-	-	-	-	-	1*	1	-	In top 5	-	-	-	5
Increased migration to urban areas	-	3	-	-	-	4*	-	-	-	3*	-	5*	-
Concerns about safety	-	1	-	-	-	-	4*	-	-	-	-	-	-
Increased use of bicycles	-	-	5	-	-	-	-	3	-	-	-	-	-
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Increased number of alternative fuel vehicles	-	-	-	-	-	-	-	-	-	-	-	2*	-
Desire for more aesthetic design	-	-	-	-	-	-	-	-	-	-	-	2*	-

*Indicates a tie

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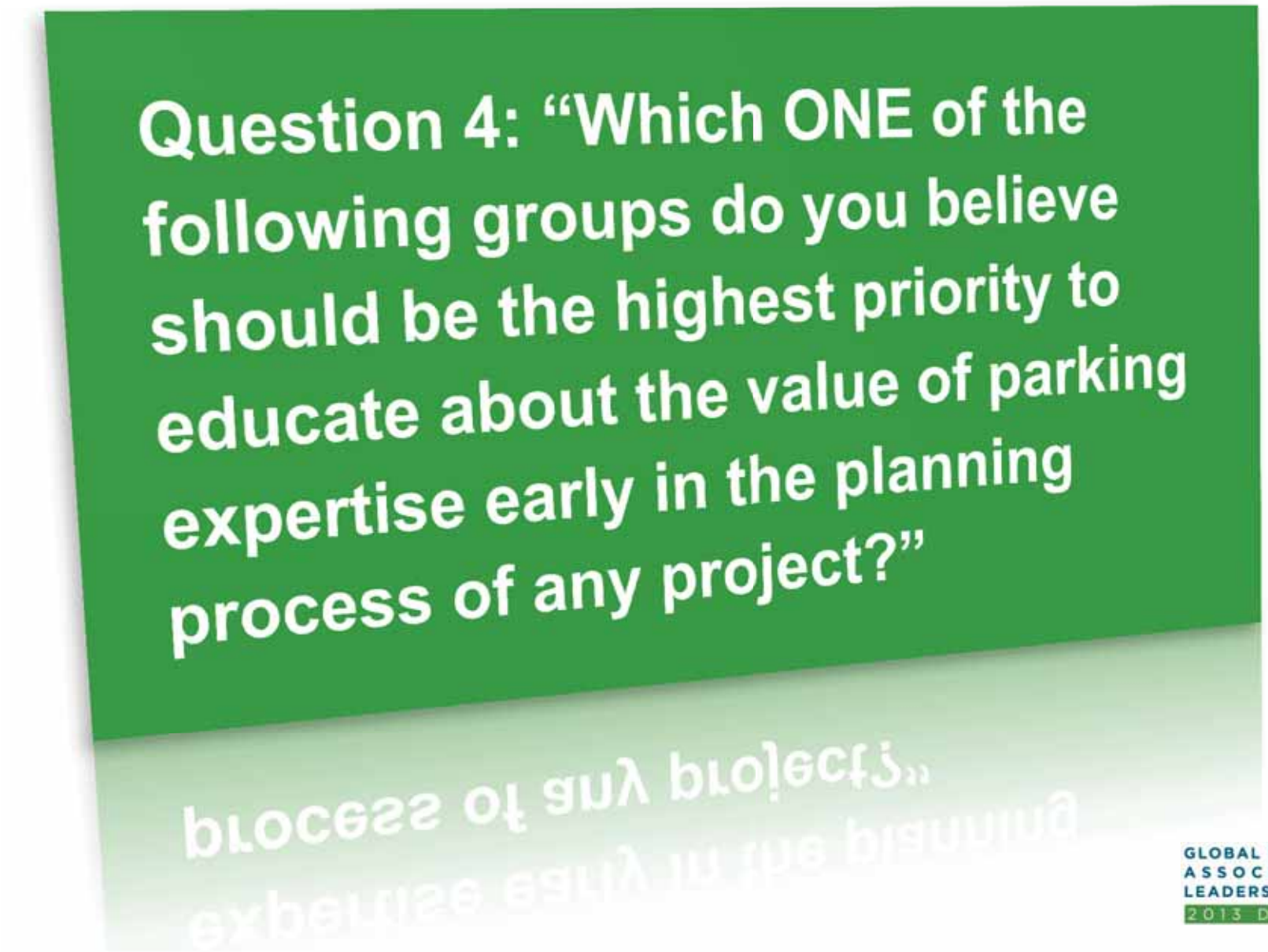
TARGETS FOR EDUCATION



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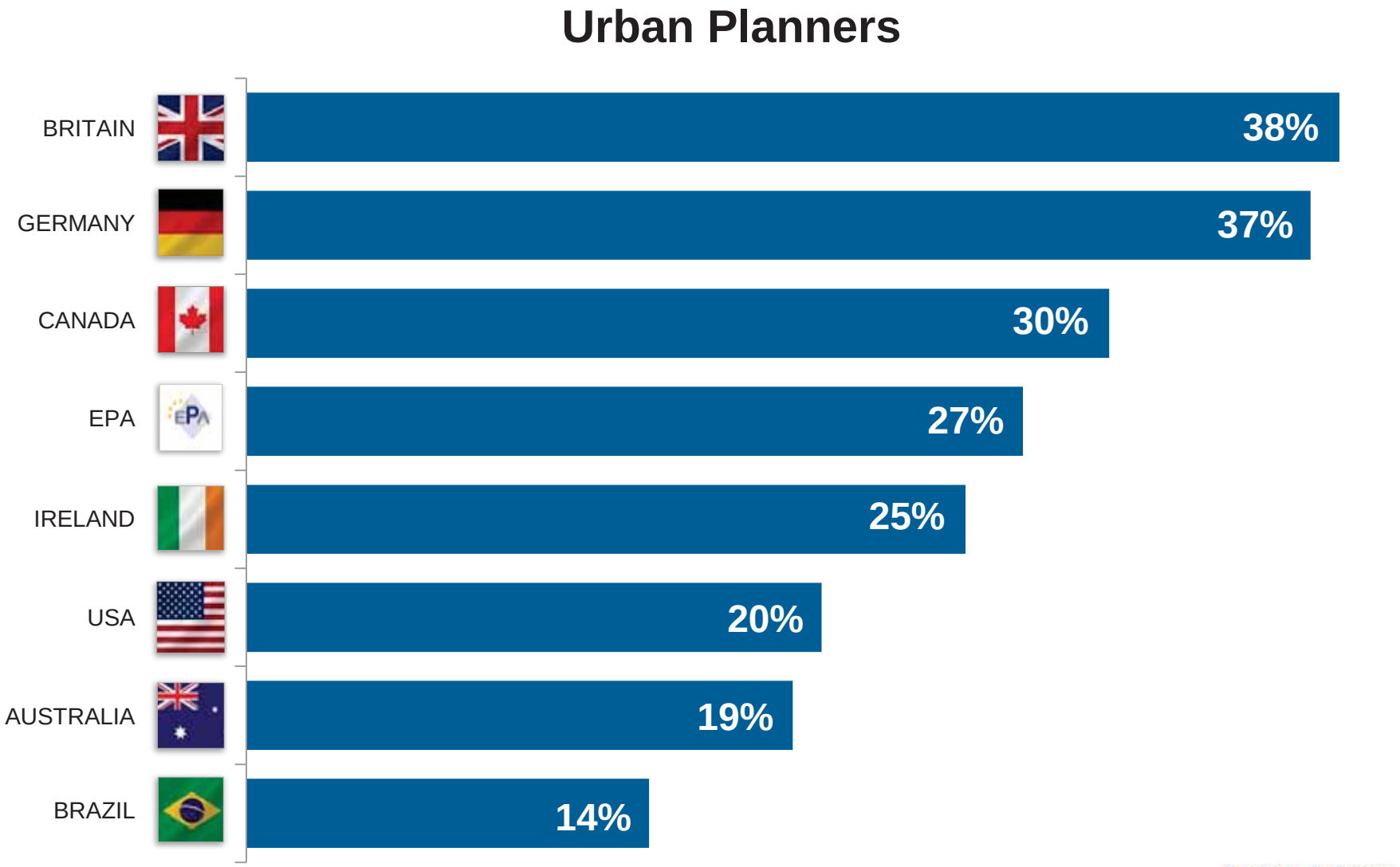
4 Highest Priority Group to Educate About Parking



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4 Highest Priority Groups to Educate About Parking

Size and order of groups denotes how respondents emphasized importance

Urban Planners

Local Government Officials

Facility Managers

Politicians

Property Owners & Developers

Architects

Transportation Officials

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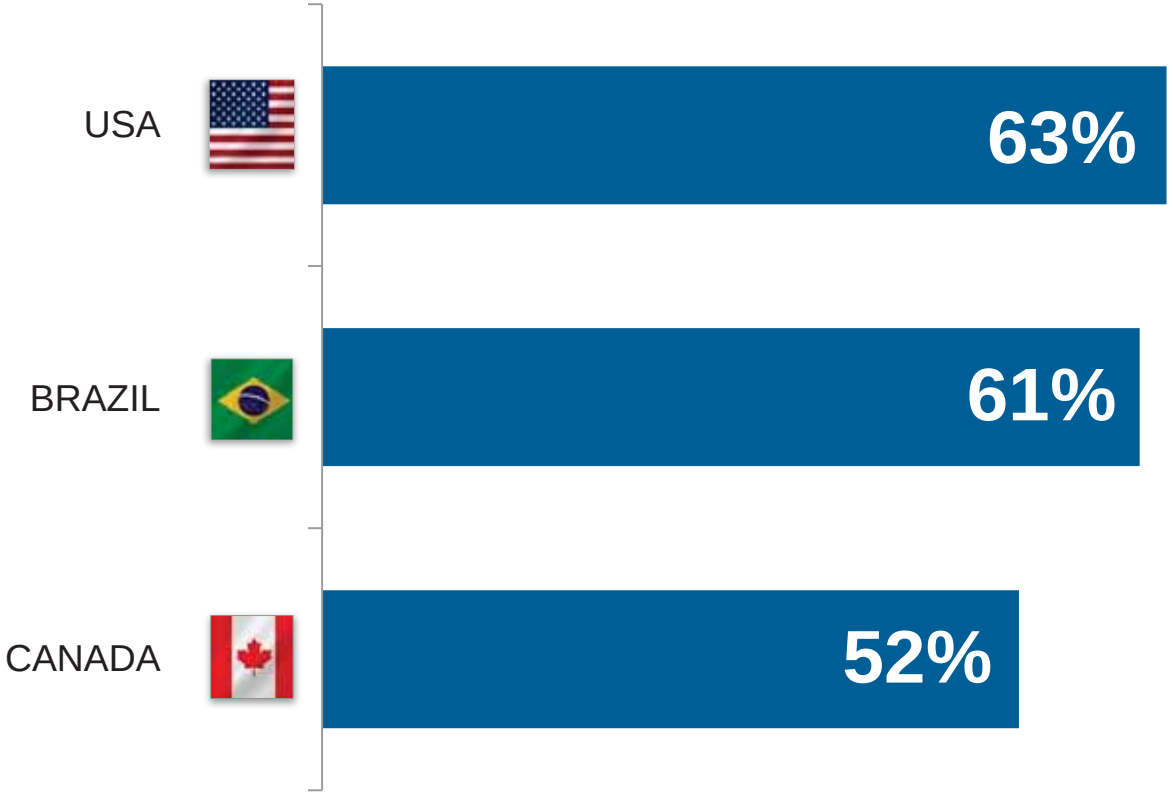
Question 5: "What statement best describes current attitudes among decision-makers such as city officials, planners, and developers about the role parking plays in contributing to transportation, urban mobility, and economic development solutions?"

5 Current Attitudes Among Decision Makers About Parking

Attitudes about parking are improving with parking considered increasingly important



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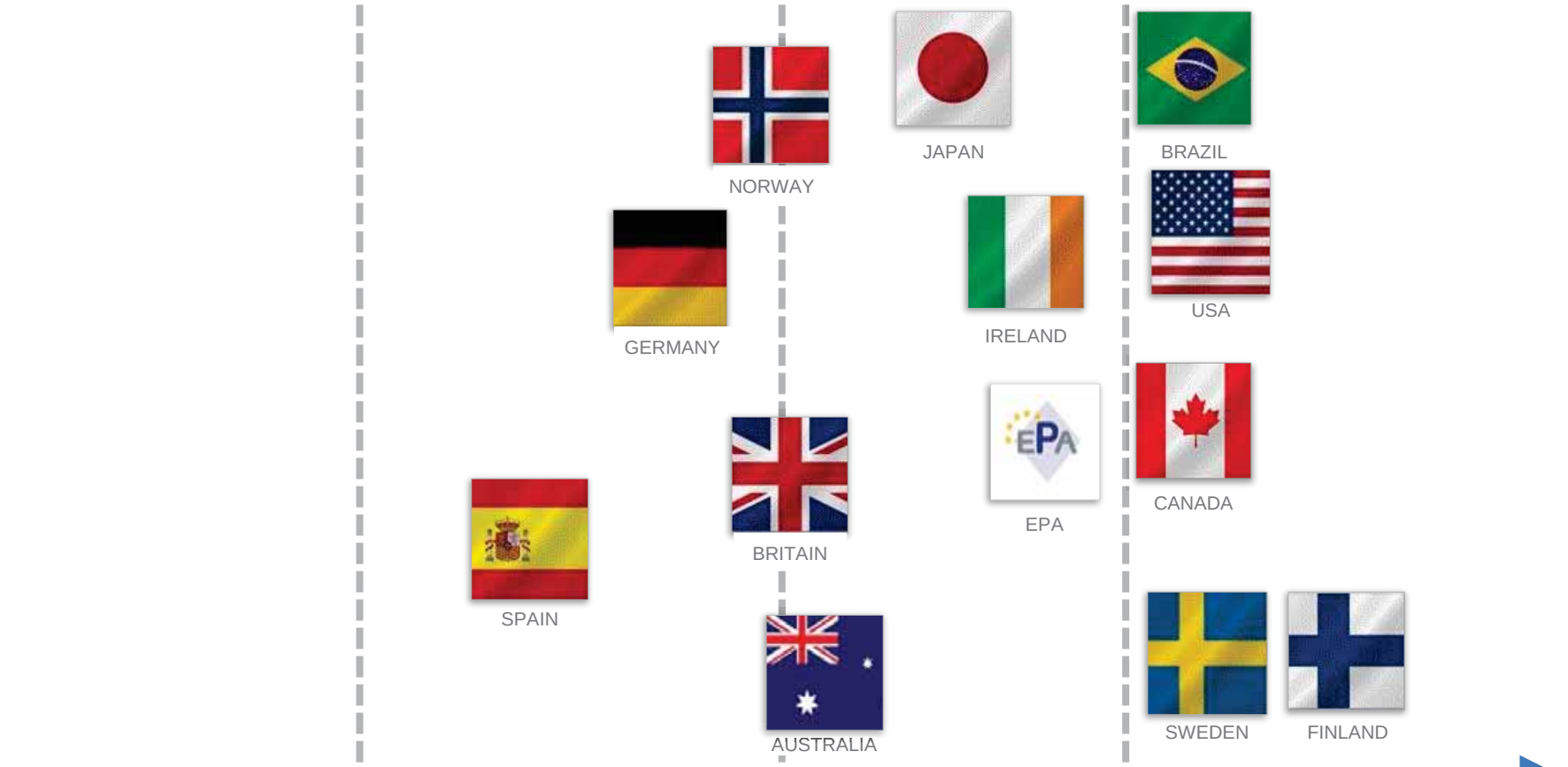
5 Current Attitudes Among Decision-Makers About Parking



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GPALs Survey
Questions 6, 7 & 8

Open-ended Questions

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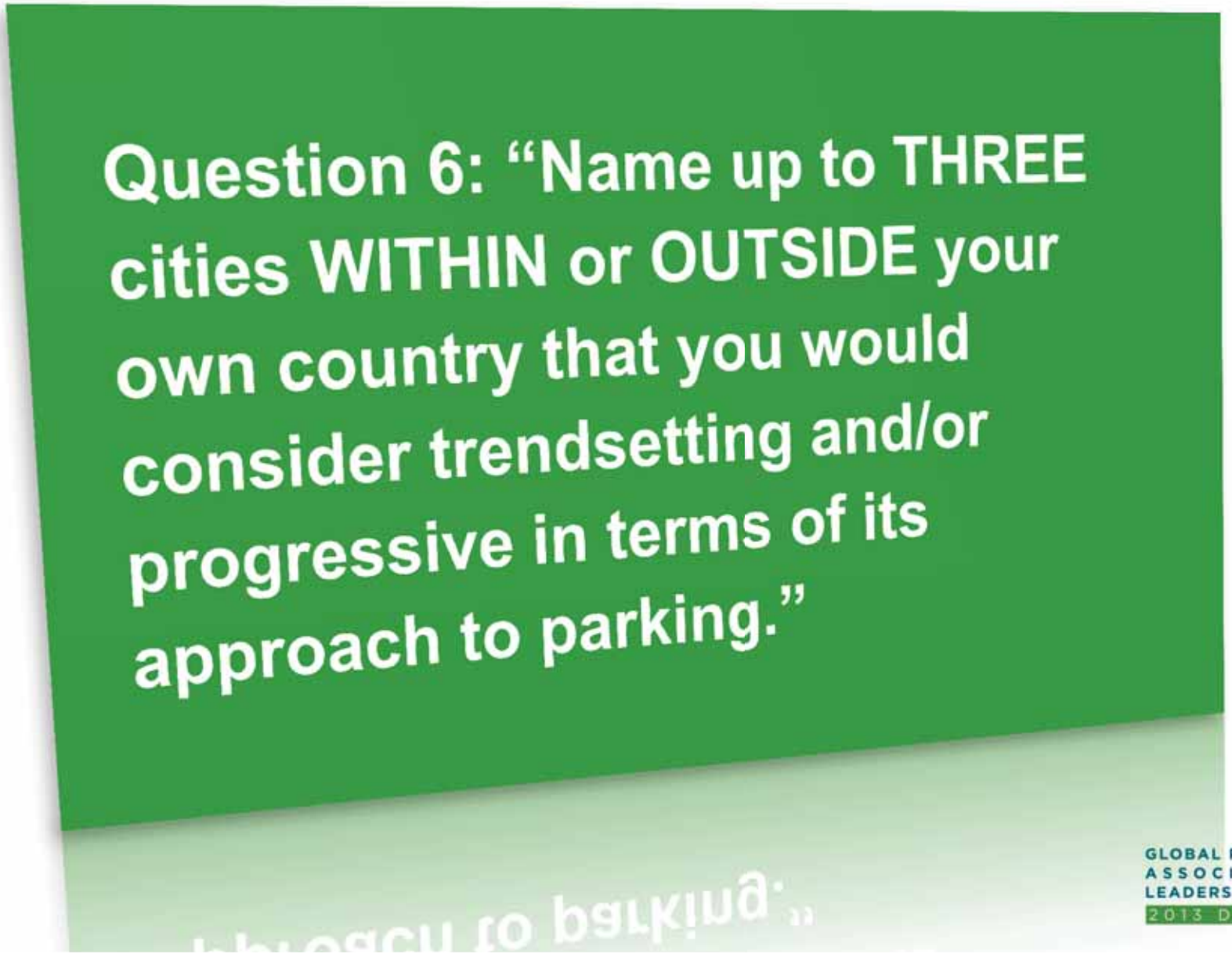
Question 6: “Name up to THREE cities WITHIN or OUTSIDE your own country that you would consider trendsetting and/or progressive in terms of its approach to parking.”
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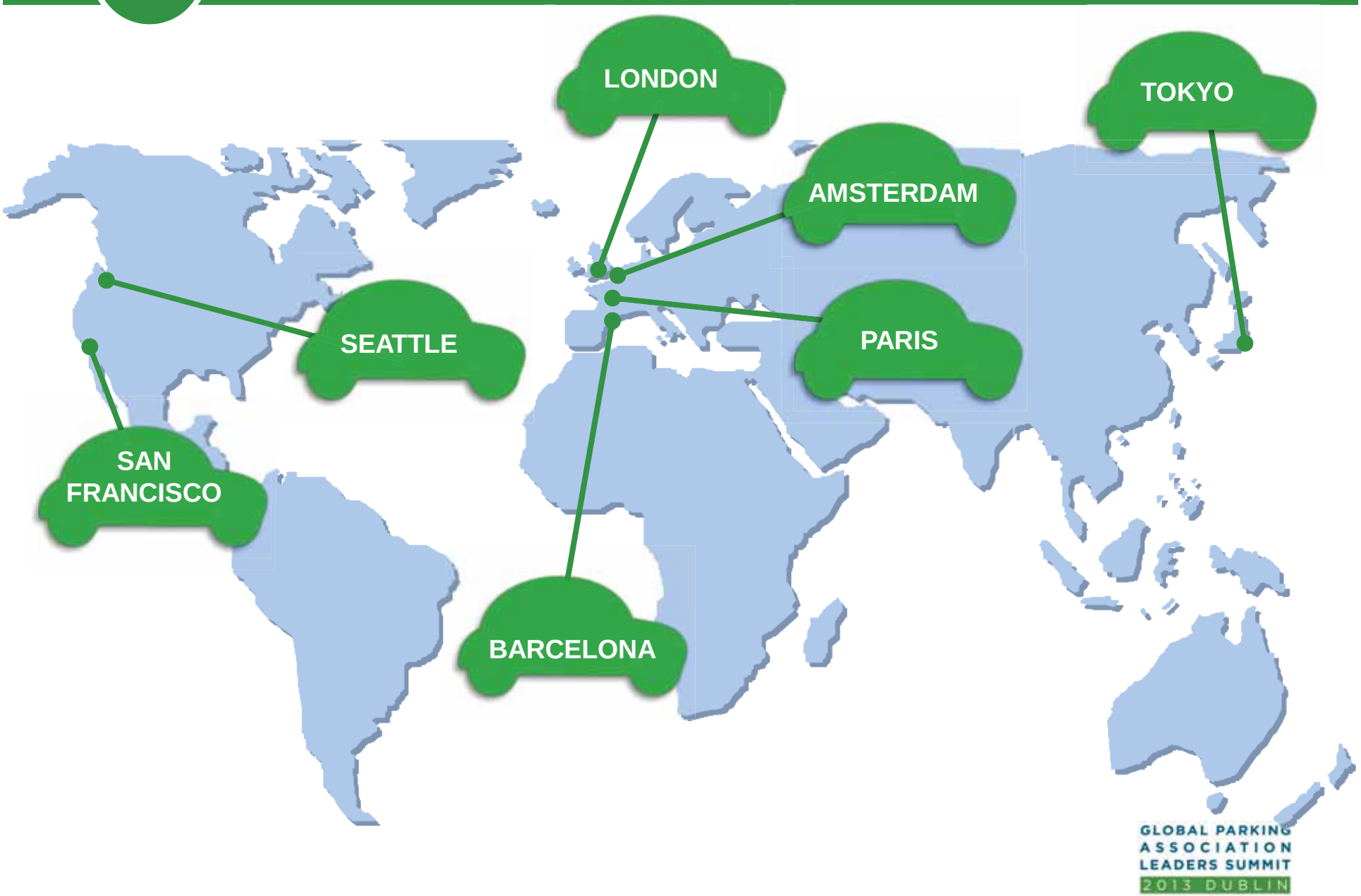
6 Top Trendsetting Cities In Parking



Question 7: “What research would be most valuable to conduct?”

7 Most Valuable Research to Conduct

- **The functioning of parking [parking economics and TDM]: 43%**
- **Impact of parking on urban mobility, sustainability and Quality of Life: 23%**
- **New technological issues: 11%**
- **Image/Perception of parking for other urban actors: 8%**
- **Focus on customers needs: 8%**
- **Relationship between parking and retail: 4%**
- **Impact of major societal changes [i.e. demographics,…] on parking: 3%**

✓**No major differences among countries**

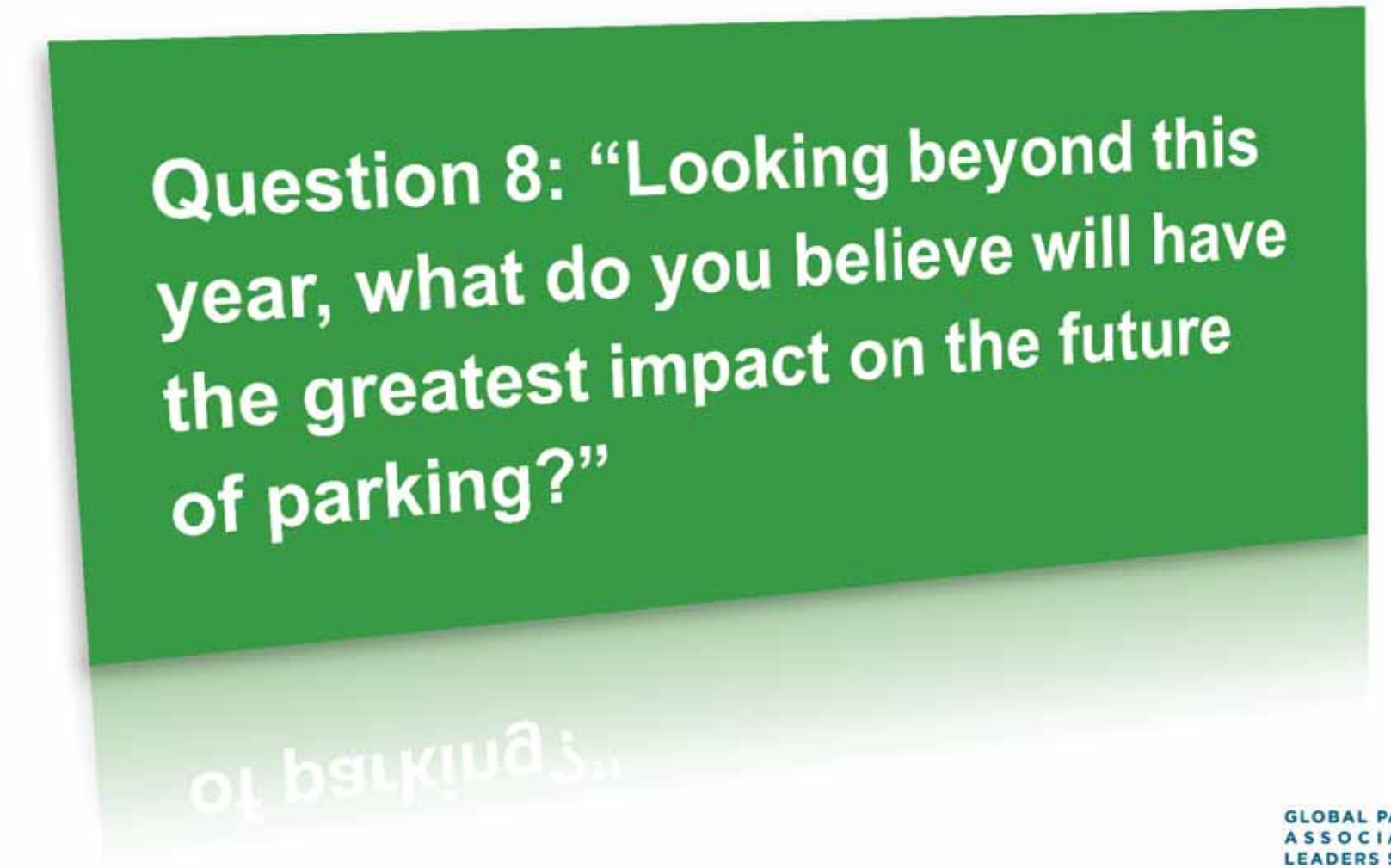
✓**Retail issue more important in Europe (especially UK)**

7 Most Valuable Research to Conduct

The functioning of parking [parking economics and TDM]: 43%

Some examples:

- **Economics of parking and ROI to cities;**
- **Utilization on street and turnover of spaces;**
- **Why drivers pass by empty car parks and waste time circulating the High Street for a space?**
- **The effects private parking for employees have on the transportation system**


Question 8: “Looking beyond this year, what do you believe will have the greatest impact on the future of parking?”

8 Greatest Impact on the Future of Parking

Total sample:

- **Technology: 33%**
- **Dealing with scarcity of space and resources and rising mobility costs in urban areas: 33%**
- **Full integration of parking in sustainable urban mobility: 21%**
- **Major societal changes [i.e. demographics, culture,…]: 11%**
- **Need for good labour force: 2%**

✓ **No major differences among countries;**

✓ **European countries seem more interested in major societal changes**


The Big Picture

MOVING FORWARD…TOGETHER

- ✓ **Many common issues**
- ✓ **Technology is transforming parking**
- ✓ **Perceptions are improving**
- ✓ **Opportunities for collaboration**

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2014 DALLAS

parking.org/GPALS

IPI Conference & Expo June 1-4, 2014 – GPALS June 1, 2014

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16th EPA Congress

16th EPA Congress
DUBLIN 2013
IRELAND September 11th-13th 2013