

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 of topics.

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

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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- 13 Parking Associations
 - Respondents from 21 countries
 - Survey translated into 5 languages

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**



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.”

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)



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

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

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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Most Impactful Trends - Ranking



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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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Most Impactful Trends - Ranking



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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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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

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

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)”

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



What Has Greatest Potential to Improve Sustainability?



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

What Has Greatest Potential to Improve Sustainability?



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

What Has Greatest Potential to Improve Sustainability?



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



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

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

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

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

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

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

Most Influential Societal Changes on Parking - Ranking



AUSTRALIA



BRAZIL



BRITAIN



CANADA



EPA



FINLAND



GERMANY



IRELAND



JAPAN



NORWAY



SPAIN



SWEDEN



USA

	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

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

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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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
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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
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*	-

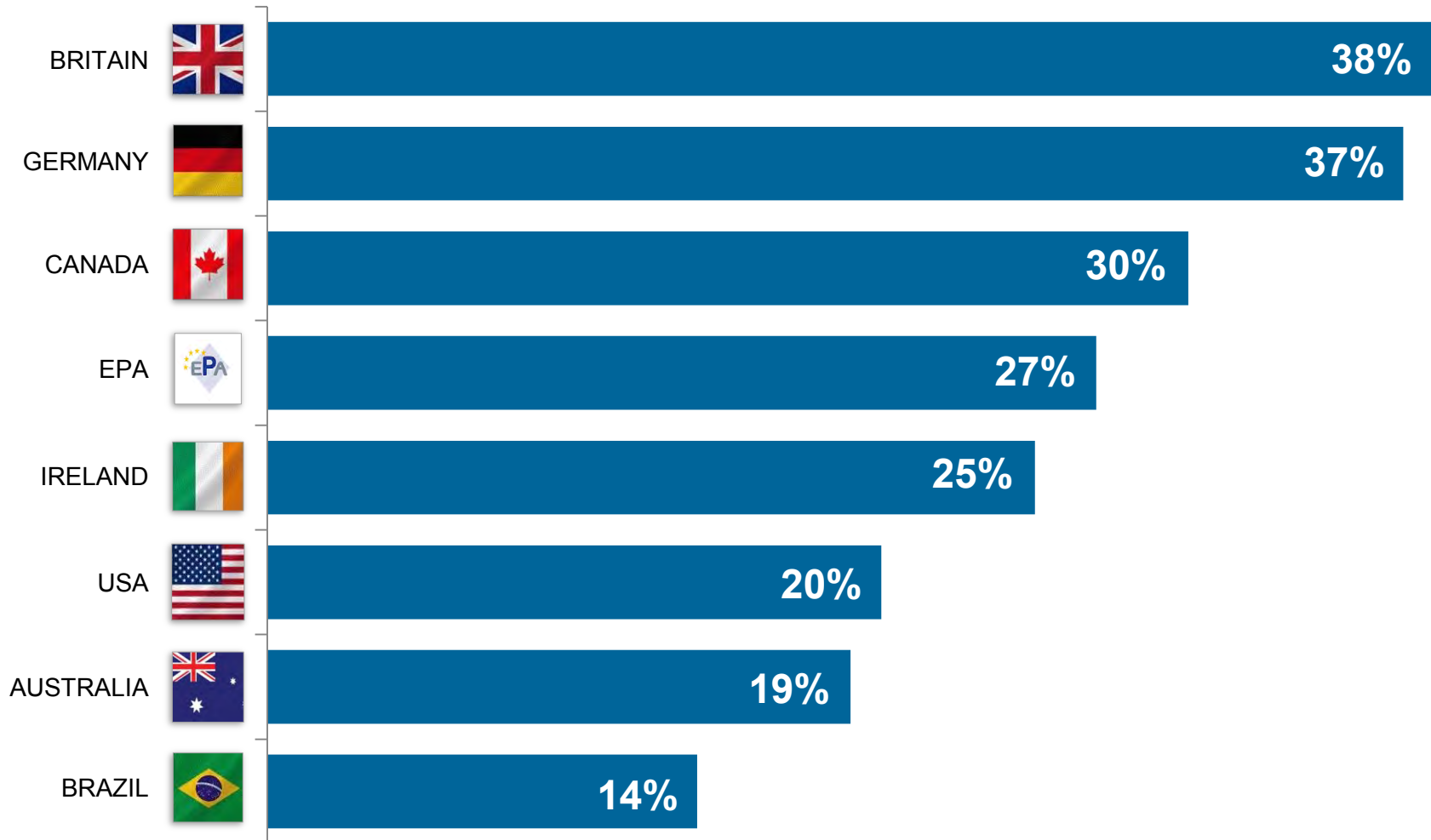
*Indicates a tie

Question 4: “Which ONE of the following groups do you believe should be the highest priority to educate about the value of parking expertise early in the planning process of any project?”

4

Highest Priority Group to Educate About Parking

Urban Planners



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

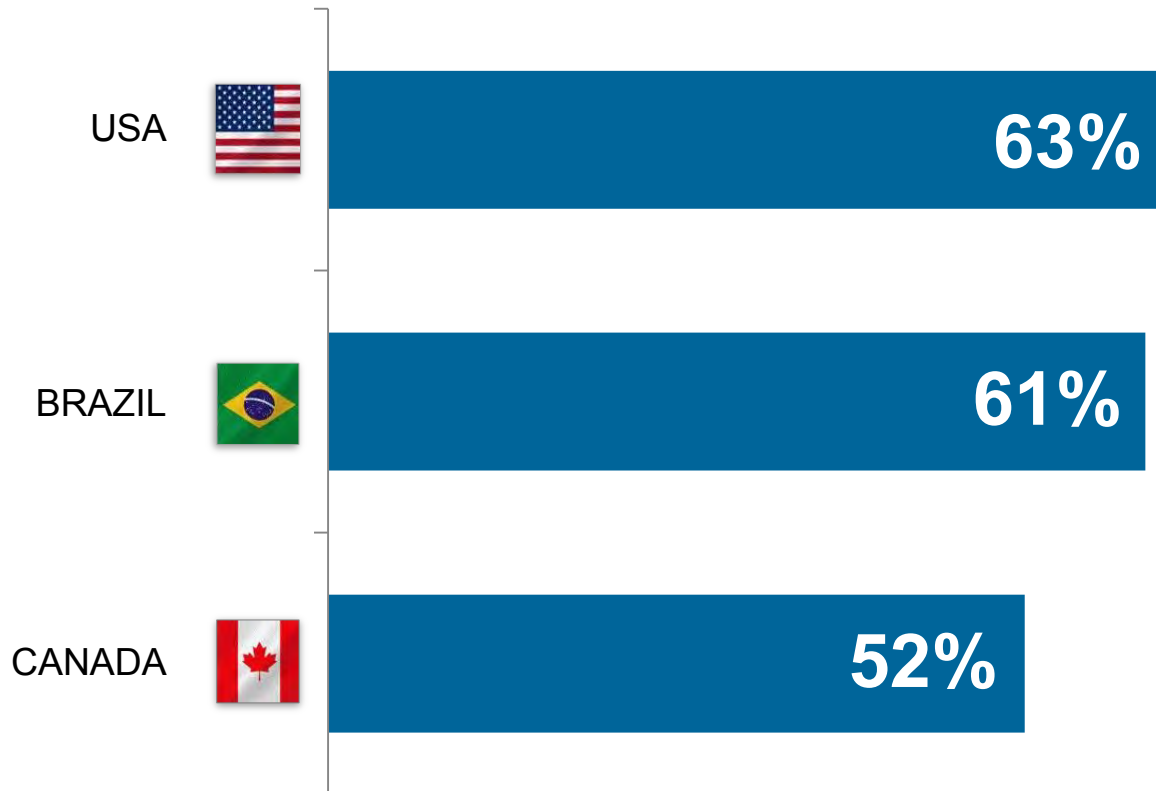
Property Owners & Developers

Architects

Transportation Officials

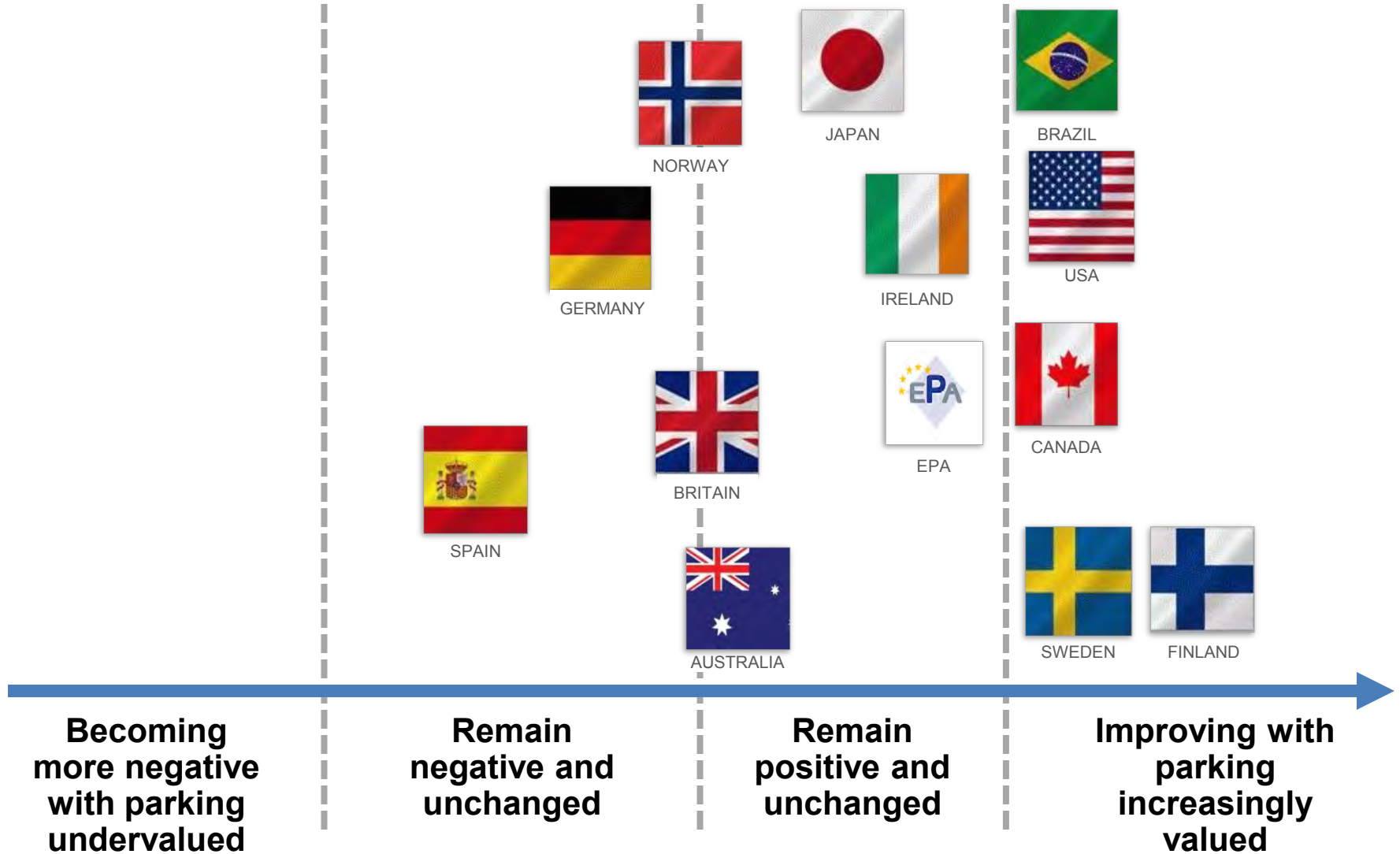
Question 5: “What statement best describes current attitudes among decision-makers such as city officials, planners, and developers about the role parking plays in contributing to transportation, urban mobility, and economic development solutions?”

Attitudes about parking are improving with parking considered increasingly important



5

Current Attitudes Among Decision-Makers About Parking



**GPALs Survey
Questions 6, 7 & 8**

Open-ended Questions

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.”

6

Top Trendsetting Cities In Parking



Question 7: “What research would be most valuable 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)

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?”

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**



GLOBAL PARKING ASSOCIATION LEADERS SUMMIT 2014 DALLAS

parking.org/GPALS

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

www.parking.org/GPALs



GLOBAL PARKING
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