Review of Parking Rules on Private Property
Quantitative Report

ADVANIS for Edmonton

January, 2019

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Background, Objectives & Methodology

Background & Objectives

Project Background

- How parking is provided and managed plays a powerful role in shaping how communities are built and how residents get around.
- Many of Edmonton's existing Zoning Bylaw rules for parking on private property were put in place in the 1970's. Edmonton has changed considerably since then and the rules need to be updated to make sure they make sense for today while also considering future planning.
- The City's goal is to make sure parking regulations are meeting the current needs of Edmontonians and that businesses and homeowners have flexibility and choice in how on-site parking on private property is provided and used. If new rules are approved by Council, the changes to on-site parking for homes and businesses will happen gradually over time as new buildings are built and properties are redeveloped.

Project Objectives

1. Gauge everyday parking attitudes and needs
2. Evaluate residential parking preferences, choices, and rules
3. Determine how varying residential parking needs and situations can be addressed
4. Evaluate commercial parking preferences, choices, and rules
5. Gauge preferences for trade-offs between various potential solutions

Project Phases

Project Planning Meeting

- At the outset of the project, Advanis and the City conducted a project kickoff meeting over the phone. This meeting gave both Advanis and the City a chance to introduce the project teams, review the project background, objectives, scope and timeline, and discuss immediate next steps

Qualitative Phase: Focus Groups & In-depth Interviews

- Focus groups and in-depth interviews were conducted with the general public, businesses, and developers to understand their opinions, and perceived benefits and barriers on the various parking regulation options.
  - Four 1.5 hour focus groups were conducted with the general public
  - Two 1.5 hour focus groups were conducted with businesses
  - Ten 30-60 minute in-depth interviews were conducted with residential and commercial developers
- Results from the qualitative phase were utilized when designing the survey for the quantitative phase.

Quantitative Phase: Surveys

- A random, telephone survey was conducted with Edmonton residents aged 18+. An identical open, online survey was also made available to City residents.

Project Planning Meeting

Qualitative Phase

- Focus groups with the general public and businesses
- In-depth interviews with residential and commercial developers

Quantitative Phase

- Random telephone survey
- Online open -link survey

Methodology

Qualitative Phase: Focus Groups & In-depth Interviews

General Public:

- Study participants were recruited from Core/Mature and Established/ Developing neighbourhoods. Separate groups were held with those who live in single family homes and those who live in multi-family homes.
- In order to get participants thinking about the issues prior to coming to the focus groups, they were asked to observe and record examples of parking that affects their daily lives throughout the week prior to the groups. They were also asked to note the type of parking they are using, and why it is a good example of parking regulations or a bad example of parking regulations.
- The groups employed a mix of self-completion questionnaires, small group team exercises, and group discussion to understand attitudes, recommendations, and trade-offs.
- Study participants were paid a $75 cash incentive in order to ensure a good show rate, and to compensate them for any travel expenses.

Businesses:

- Small business/franchise owners were recruited from Core/Mature and Established/Developing neighbourhoods. A mix of business types (e.g., retail, restaurants, services) were represented in each group.
- The groups employed a mix of self-completion questionnaires, small group team exercises, and group discussion to understand attitudes, recommendations, and trade-offs.
- Study participants were paid a $100 cash incentive in order to ensure a good show rate, and to compensate them for any travel expenses

Residential and Commercial Developers:

- The City provided lists and sent emails to developers to introduce the people involved in this study and ask for their participation. No incentives were paid to these participants.

Methodology

GENERAL PUBLIC: Random telephone survey

- The target population is Edmonton residents aged 18 and older.
- **801** completed surveys were collected, achieving a margin of error of **±3.1**% (19 times out of 20) for aggregate results.
  - Hard quota targets were set for neighbourhood types:
    - *Core and mature neighbourhoods: minimum of 300 completes*
    - *Established and developing neighbourhoods: minimum of 300 completes*
  - Soft quotas were set by age (18-34, 35-54, and 55 or older), gender, and quadrant to ensure a representative mix of respondents from all across Edmonton.
- Advanis targeted 30-40% of the total surveys from landline sample and 60%-70% from cell phone sample.
  - 39% of Albertans do not have a landline phone according to the 2016 Stats Canada Survey of Household Spending, which explains why we propose to call relatively more wireless sample.
  - Advanis weighted results to match the most recent Statistics Canada age/gender figures for Edmonton and phone type usage (landline only, wireless only, or both). Households with both landline and wireless phones will have a greater chance of being surveyed. The weighting approach addressed that.
- **Throughout the report, the number of individuals who answered each question are shown (i.e., the base size), while the percentages are based on the weighted results.**

Methodology

OPEN SURVEY: Non-random online open-link survey

- An open-link online survey was also made available to Edmonton residents aged 18 and older.
- **796** completed surveys were collected. Since the sample is non-random, a margin of error cannot be stated. The data has not been weighted and are not representative of the Edmonton general public. *These results should be interpreted with caution.*
- The open survey was completed by a population that notably differs from the telephone survey respondents in the following ways, in terms of demographics:
  - More likely to be 35-54;
  - More likely to own their current residence;
  - More likely to live in multi-family homes;
  - More likely to have obtained an undergraduate, post-graduate, or professional school degree;
  - More likely to be employed full-time and less likely to be unemployed or retired;
  - Has fewer people living in household;
  - Less likely to have people under 18 (minors) in household;
  - Less likely to be male;
  - More likely to live in a mature/core neighbourhood;
  - More likely to rely on a sustainable mode of transportation as their primary mode of transportation.
- Due to demographic differences – and the nature of how the survey was made available – it is reasonable to expect open survey results to reflect a more engaged and informed segment of Edmontonians.

Key Findings

Key Findings: Parking Behaviors & Attitudes

Explore the details starting on page 16

- Nearly every household that participated in the survey had at least one car.
- Driving is the primary mode of transportation for about eight-in-ten survey respondents.
  - Vehicle ownership is lower and primary use of a sustainable mode of transportation is higher among those who live in a multi-family home, rent, and have lower levels of household income.
  - Vehicle ownership is lower among those who are 55+, while the primary use of sustainable modes of transportation is higher among those who are 18 to 34 years old.
- Survey respondents generally have little difficulty finding a place to park at home, while shopping or running errands, and at work. However, over half have difficulty finding a place to park while attending events.
  - Those who typically park their car on the street when at home are more likely to report having difficulty finding a place to park at home.
- Although respondents generally do not have difficulty finding places to park (with the previously noted exception of parking at special events), there is not a strong perception that excessive parking spots exist. Only a third of residents reported often see empty parking lots around Edmonton.

- There is near unanimous agreement among respondents that buildings should be allowed to share parking spaces, and high agreement that the availability of sidewalks in large parking lots makes it easier/safer
- There is a strong preference for parking lot over street parking at businesses/restaurants.
  - Limited parking deters two-thirds from visiting restaurants, while over half would be deterred from driving to work if they had to pay to park.
- Only one-third of respondents are aware that the City Zoning Bylaw sets the minimum number of required parking spaces for new homes and businesses, and a similar proportion believe the City should be responsible for these decisions for businesses and households.
  - Approximately two-thirds believe these decisions should be made by someone other than the City with 45% favouring the owner or occupants for decisions regarding residential parking.

Key Findings: Parking Regulations Scenarios

Explore the details starting on page 25

- Survey respondents were presented with three different parking scenarios and asked to rank them in their order of preference.
- Two scenarios were ranked number one by an equal proportion of respondents: *mix of free and paid parking* and *free abundant surface parking* (each ranked #1 by 39%). When taking into consideration the second most preferred scenario, the *mix of free and paid parking* scenario dominates on aggregate (79% vs. 65% for the *free abundant surface parking* scenario).
  - Diversity in scenario preferences can be found when viewing preferences by various segments.
  - Those who are 35+, males, living in established/developing neighbourhoods, primarily drive, and living in duplex/semi-detached houses prefer the *free abundant surface parking* scenario over the other two scenarios.
  - The *free abundant surface parking* scenario is favoured because it accommodates easy-to-navigate surface parking over underground parking, due to personal preference, and because of the space it would provide.
- The *mix of free and paid parking* scenario is favoured because it allows for a balance of various transportation methods, fits into people’s lifestyle, the fairness of offering both paid and free parking, and its overall convenience.
- The *mainly paid underground parking* scenario is the least preferred. Respondents generally find surface parking easier to navigate than underground parking, although those who are 55+ appreciate the security features that underground parking can offer.

Key Findings: Parking Regulations Outcomes

Explore the details starting on page 34

- When considering different outcomes related to parking, survey respondents are most concerned with the availability of personal parking when needed (both at home and at shops/businesses). In addition, having walkable neighbourhoods with options to get around is also perceived to be very important.
  - The most important parking outcomes to survey respondents are:
    - The availability of parking at home;
    - Being able to park on the street in front of their house;
    - Having options to get around (e.g., transit, biking, walking);
    - Walkable neighbourhoods; and
    - The availability of parking at shops and businesses.
- Respondents are least concerned with the reduction in parking regulations.
  - The least important parking outcomes to survey respondents are:
    - Businesses can choose how much parking they need for their customers;
    - Reducing Edmonton's reliance on vehicles;
    - Less red tape for businesses wanting to open in Edmonton;
    - Homeowners can choose how many parking spaces they need; and
    - Lower costs for home and apartment/condo construction.
- Respondent preferences aside, when examining the alignment of parking outcomes with each scenario, the *mix of free/paid parking* scenario comes out on top as it addresses many different needs. Of the 14 outcomes tested, 13 of these outcomes will be met at least somewhat by this scenario – nearly double the number of outcomes that would be addressed by each of the other two scenarios tested.

Key Findings: Demographics

Explore the details starting on page 49

- Nearly three-quarters of survey respondents own their own residence, and 68% live in a standalone single family dwelling. On average, survey respondents have lived in their current residence for 12.5 years, and have lived in Edmonton for 28.2 years.
- On average there are 3.1 people per household among survey respondent, with 64% of survey participating households including individuals who are under 18.
- Approximately half of survey respondents have a household income that is less than $100,000, and 49% are employed full-time. Just over half have completed college/technical school or have an undergraduate degree.
- Access to public transit is rated as good by 62% of survey respondents.

Key Findings: Survey Comparison

GENERAL PUBLIC vs. **OPEN SURVEY**

- The results presented for those completing the open link online survey have not been adjusted to reflect the actual Edmonton population. As such, key demographic differences among those completing the open online survey are noted:
  - Over two-thirds completing the open survey are located in mature/core neighbourhoods;
  - They tend to be slightly older and are less likely be male than the general public;
  - They are more likely to own their residence, have higher household income, and are more highly educated than the general public; and
  - The size of household tends to be smaller than the general public, and less likely to include someone under 18 years of age.
- The most significant difference between the telephone survey respondents and those completing the open survey is their reliance on vehicles. Those completing the open survey are less reliant on vehicles than the general public.
  - Although a similar proportion of households in both samples have at least one vehicle, fewer vehicles are associated with each household on average among those completing the open online survey.
  - Similarly, driving as the primary mode of transportation is less prevalent among those completing the open online survey (65% vs. 79%), while a much larger proportion rely on a sustainable mode of transportation (29% vs. 14%).

Key Findings: Survey Comparison

GENERAL PUBLIC vs. **OPEN SURVEY**

- The lower reliance on vehicles found among those completing the open online survey is evident when examining their parking scenario preferences and importance ratings for regulation outcomes.
  - Half ranked the *mix of free and paid parking* scenario first. Those who did were drawn to this scenario because it offers a choice of transportation modes and encourages walking/more active lifestyle.
  - The two remaining scenarios were about equally preferred among those completing the open survey.
  - The two most important parking outcomes to those completing the open survey were walkable neighbourhoods and having non-vehicle options for getting around. These were more important to those completing the open survey than to the general public.
    - The availability of parking at home is still important to those completing the open online survey, however it ranks third in importance overall.
    - Reducing Edmonton's reliance on vehicles is another top concern to those completing the open online survey (ranks 4^{th}), more so than the general public.
- Those taking the open online survey tend to believe that businesses are best suited to make parking decisions, but are split on whether the owner/occupant or the City is best suited to make parking decisions for households. Awareness of City Bylaws related to the minimum required parking spaces is very high (79%).
- People completing surveys online tend to have lower levels of agreement than those completing surveys over the telephone, so it is not a surprise that agreement is lower for many of the attitude statements among those completing the survey online.

Key Findings - Qualitative Phase

The public opinion research for this project entailed multiple phases including focus groups, in-depth interview, and surveys. The surveys were designed based on the learnings from the focus groups. This report focuses on the findings of the surveys. Below are a few highlights of what we learned from the focus groups and in-depth interviews.

Note: Focus groups and in-depth interview discussions are exploratory in nature with the flexibility to uncover and examine topics and issues relevant to project objectives. Due to the limited number of respondents, results cannot be generalized or quantified, but rather are to be considered in a qualitative frame of reference.

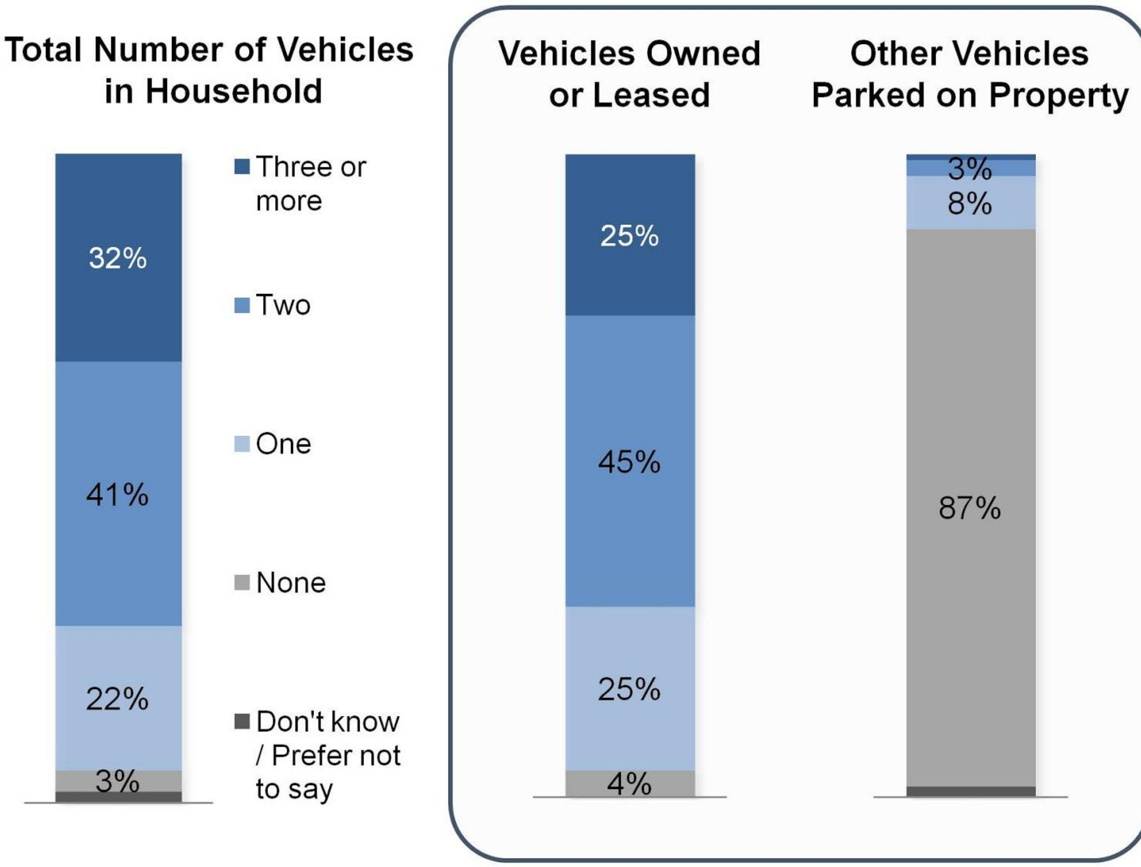
Key Themes from Businesses and Developers Focus Groups & Interviews

- Parking concerns among businesses include lack of availability and the high costs of parking.
- General feeling that businesses know best how many parking spaces they require, but regulations still necessary to ensure that a business' lack of parking does not negatively impact surrounding neighbourhoods.
- Developers represented a range of types of development, from small residential, to communities, to large, mixed-use developments. Attitudes about Edmonton's parking regulations ranged depending on the type of development. In general, developers want consideration for projects on a case-by-case basis.
- Relaxed parking regulations may contribute to more creative and attractive landscapes and amenities.
- People trust the City of Edmonton to ensure projects adhere to standards that protect citizens and contribute to the appeal of the city.

Detailed Findings:
Parking Behaviours & Attitudes

Number of Vehicles per Household

- Nearly all survey respondents come from households that have at least one vehicle.
- The vast majority of household vehicles are either owned or leased.

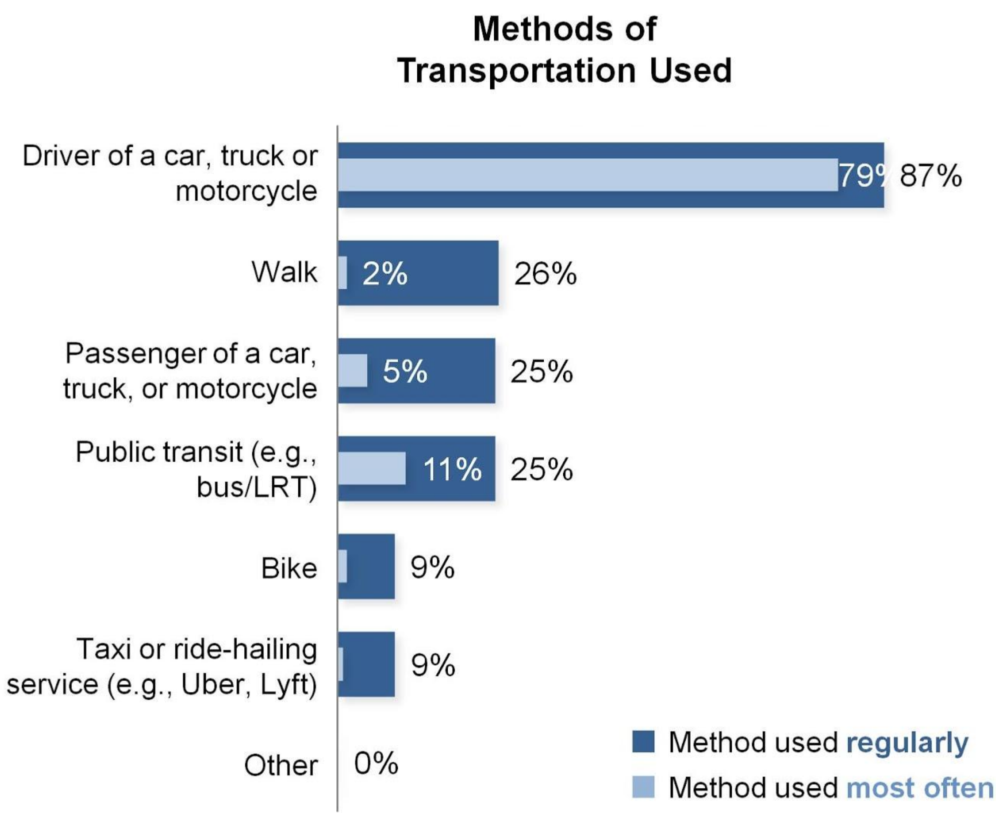


Those more likely to have 2 or more vehicles in their household include:
- ✓ *Males*
- ✓ *18 to 54 year olds*
- ✓ *Household incomes of $100,000 or higher*
- ✓ *Standalone single family homes*
- ✓ *Own their residence*
- ✓ *Established/Developing neighbourhoods*
- ✓ *Primary mode of transportation is as a driver of a car, truck, or motorcycle*

A2a -- How many vehicles does your household own or lease? Base: All respondents (n=801)
A2ba – How many other vehicles park on your property or are associated with someone living on your property (for example a company vehicle or tenant)? Base: All respondents (n=801)

Methods of Travelling

- Driving a car dominates as the most used mode of transportation among survey respondents.
- Sustainable transportation modes (public transit, biking, walking) are more prevalent among those who live in multi-family homes, those living in a Mature/Core neighbourhood, those who rent their residence, and those who are 18 to 34 years old.



Those more likely to primarily be DRIVERS include:

- ✓ *Males*
- ✓ *Standalone single family home, duplex, or townhouse*
- ✓ *Own their residence*
- ✓ *Household incomes of $100,000+*
- ✓ *Developing/established neighbourhoods*

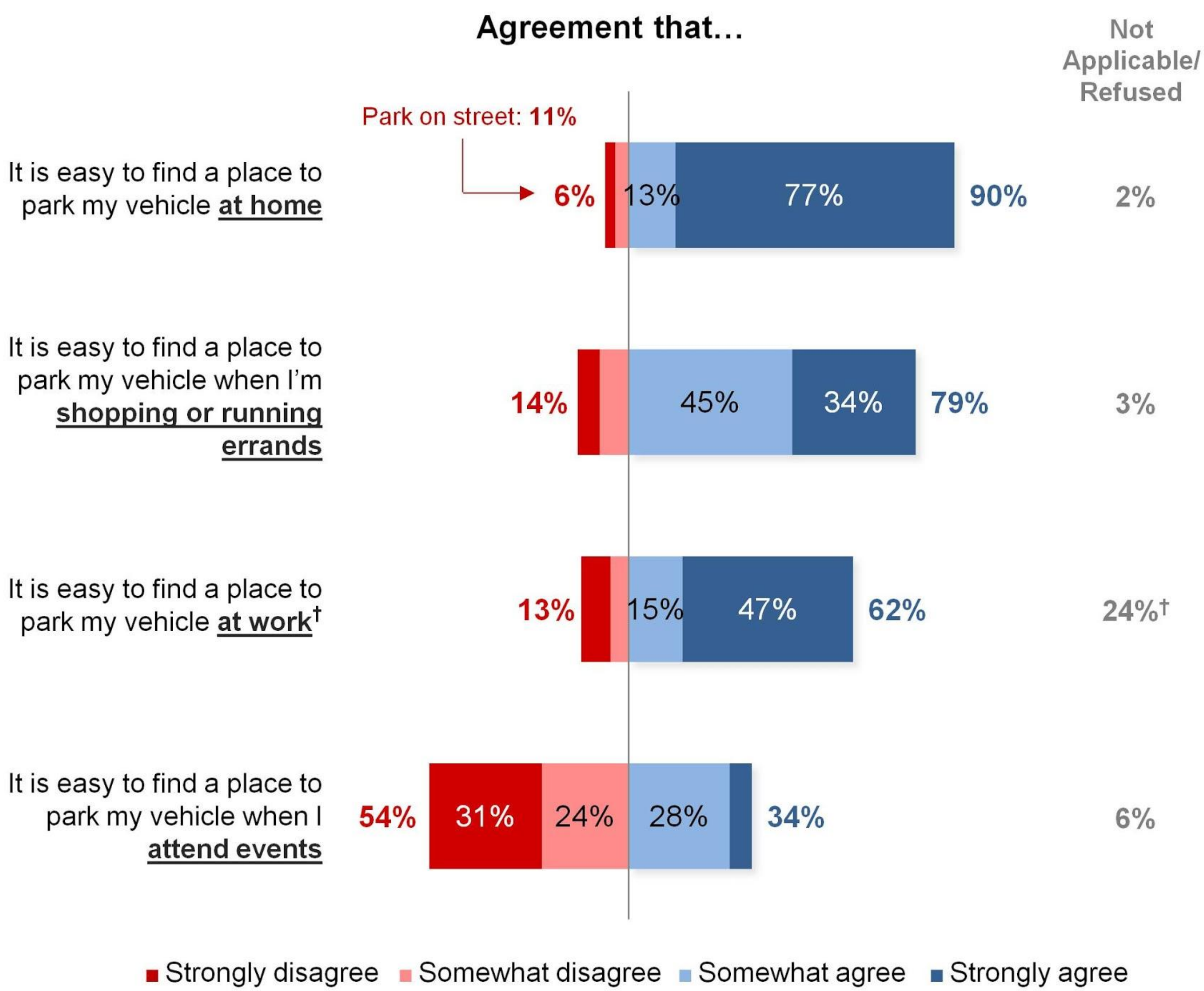
Those more likely to primarily use ANY SUSTAINABLE MODE (public transit / bike / walk) include:

- ✓ *18 to 34 year olds*
- ✓ *Multi-family homes*
- ✓ *Rent their residence*
- ✓ *Mature/core neighbourhoods*

A3 -- Which of the following methods of travelling do you regularly use? Base: All respondents (n=801)
A3a – Which method of travelling do you use the most or more often than the others? Base: All respondents (n=801)

Ease of Parking in Edmonton

- Survey respondents find it easy to find a place to park at home, when shopping/running errands (although less so among older residents), and at work (among those who work).
- On the other hand, finding parking when attending events is widely considered difficult.



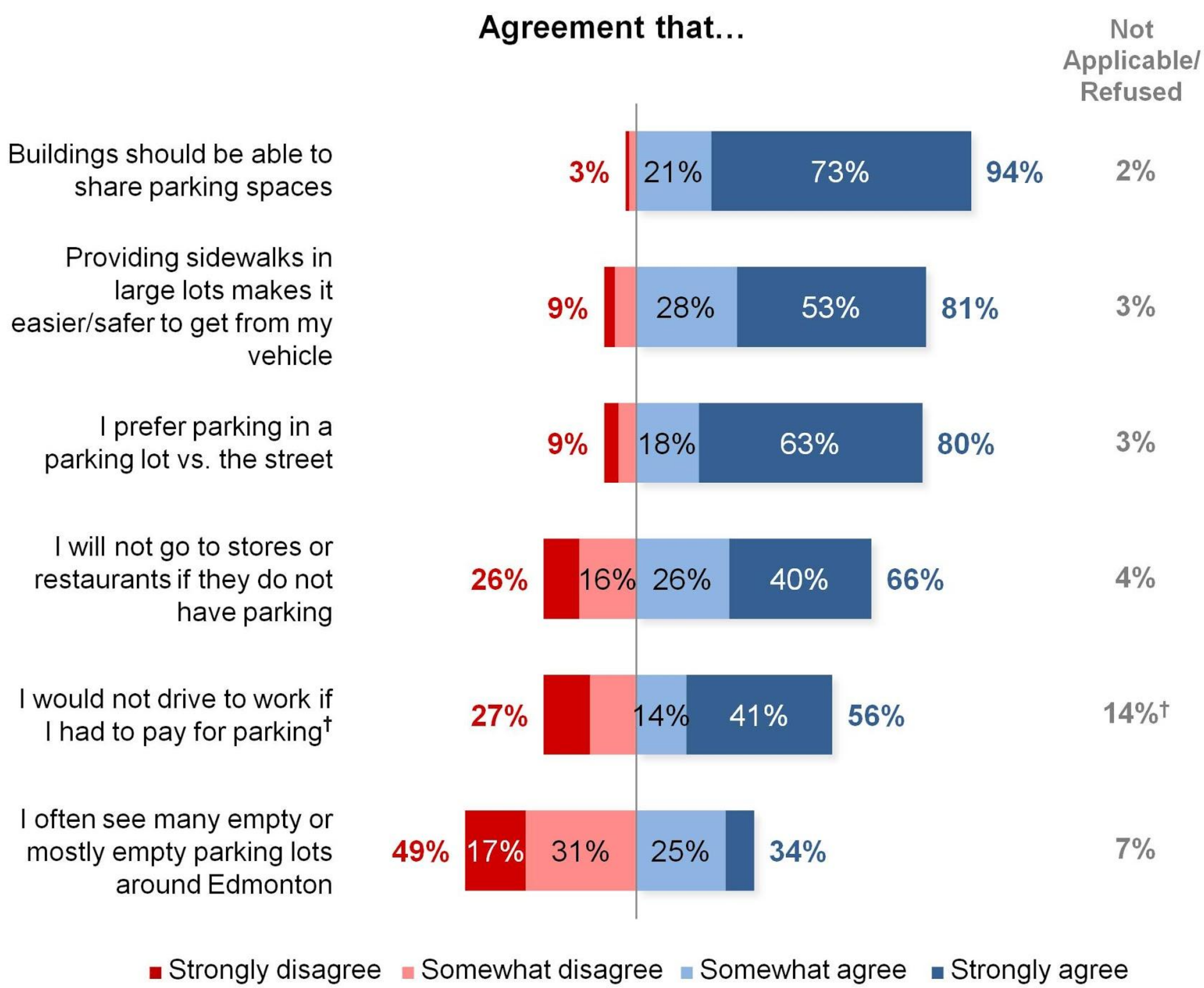
Values less than 10% are not shown on charts

† **Indicates that no answer level(s) (e.g., prefer not to disclose) sum to 10% or more**

A4 -- Please indicate whether you … Base: All respondents (n=801)

Other Thoughts About Parking in Edmonton

- Most survey respondents agree that buildings should sharing parking spaces, availability of sidewalks in large parking lots makes it easier/safer to get to car, and that they prefer parking lots over street parking for businesses/restaurants.
- Limited parking deters people from visiting restaurants and having to pay to park would deter about half from driving to work.
- Half do not perceive that parking lots are many or mostly empty in Edmonton.



Values less than 14% are not shown on charts

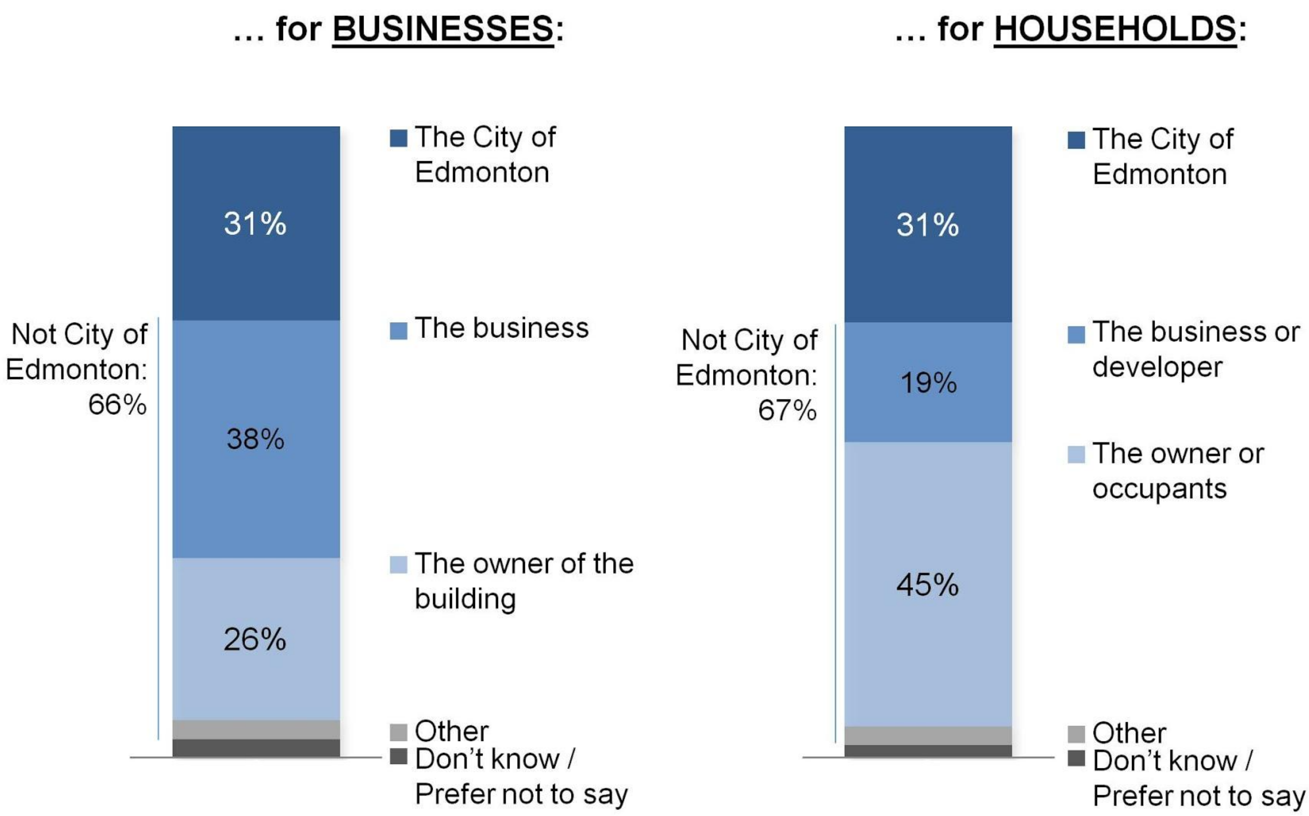
† **Indicates that no answer level(s) (e.g., prefer not to disclose) sum to 10% or more**

A4 -- Please indicate whether you … Base: All respondents (n=801)

Best Situation to Determine Parking Spaces

- Opinions vary regarding who should decide how many parking spaces are needed for businesses with nearly 2-in-5 believing this should be the business.
- Nearly half believe that the owner/occupant should make this decision for households.

Who is best situated to decide how many parking spaces …



Those more likely to indicate the business or developer include:
- ✓ *18 to 34 year olds*
- ✓ *Established neighbourhoods*

Those more likely to indicate the owner or occupants include:
- ✓ *Standalone single family home*

Those more likely to indicate the City of Edmonton include:
- ✓ *Developing neighbourhoods*
- ✓ *Mature/core neighbourhoods*
- ✓ *35+ years old*

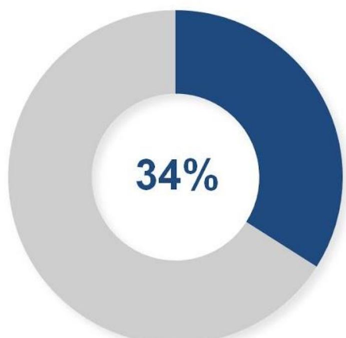
A5a -- Who is best situated to decide how many parking spaces businesses must have to serve their customers? This would not include any parking that may be available on the street. Base: All respondents (n=801)

A5b -- Who is best situated to decide how many parking spaces each household should have available on private property? This would not include any parking that may be available on the street. Base: All respondents (n=801)

Awareness of Minimum Parking Regulations

- About 3-in-10 believe that the City should make these decisions and only one-third are aware that the City has a parking bylaw that sets the minimum number of parking spaces.

Aware that City Zoning Bylaw sets minimum number of required parking spaces:



Those more likely to be aware include:

- ✓ *Males*
- ✓ *55 years old or older*
- ✓ *Those who own their residence*
- ✓ *Those with post-secondary education*
- ✓ *Primary transportation is driving*
- ✓ *Household income of $150k or more*

A7 -- Were you aware that the City of Edmonton's Zoning Bylaw sets a minimum number of required parking spaces that must be provided with new homes and businesses? Base: All respondents (n=801)

Parking Behaviours and Attitudes:
General Public vs. Open Survey

	General Public	Open Survey
***Number of Vehicles per Household** (mean)*		
Total Number of Vehicles in Household	**2.2↑**	2.0
Vehicles Owned or Leased	**2.1↑**	1.8
Other Vehicles Parked on Property	0.2	0.2
Primary Method of Travelling		
Driver	**79%↑**	65%
Passenger	5%	6%
Walk	2%	**8%↑**
Public transit	11%	12%
Bike	1%	**9%↑**
Best Situation to Decide Parking for Businesses		
The business	38%	**44%↑**
The owner of the building	**26%↑**	9%
The City of Edmonton	31%	34%
Best Situation to Decide Parking for Households		
The business or developer	**19%↑**	9%
The owner or occupants	45%	41%
The City of Edmonton	31%	**42%↑**
Awareness of City Bylaw Setting Minimum # of Spaces		
Aware	34%	**79%↑**

Parking Behaviours and Attitudes:
General Public vs. Open Survey

	General Public	Open Survey
Agreement with ... *(NET Agree)*		
It is easy to find a place to park my vehicle **at home**	**90%↑**	84%
It is easy to find a place to park my vehicle when I'm **shopping or running errands**	**79%↑**	68%
It is easy to find a place to park my vehicle **at work**†	**62%↑**	45%
It is easy to find a place to park my vehicle when I **attend events**	34%	37%
Buildings should be able to share parking spaces	94%	95%
Providing sidewalks in large lots makes it easier/safer to get from my vehicle	**81%↑**	67%
I prefer parking in a parking lot vs. the street	**80%↑**	44%
I will not go to stores or restaurants if they do not have parking	**66%↑**	50%
I would not drive to work if I had to pay for parking†	**56%↑**	43%
I often see many empty or mostly empty parking lots around Edmonton	34%	**47%↑**

† Indicates that no answer level(s) (e.g., prefer not to disclose) sum to 10% or more

Detailed Findings:
Parking Regulations Scenarios

Preferred Parking Scenario Descriptions

*Respondents were presented with three different parking scenarios – **(1)** free abundant surface parking, **(2)** mix of free and paid parking, and **(3)** mainly paid underground parking – then were asked to rank the scenarios in order of their preference:*

1. There is free abundant surface parking

Businesses and homes are located further apart, which makes neighbourhoods less walkable and creates longer drives to work or errands. The construction cost of new homes and businesses is relatively low.

This scenario would be similar to an area like South Edmonton Common or a condo complex with a large surface parking lot.

2. There is a mix of free and paid parking

Some businesses have surface parking lots, others have underground parking, and some have no parking at all. Large families may have three parking spaces at home, while a single senior may have none. Businesses and homes are located closer together and neighbourhoods are more walkable. Commutes and errands can be done by walking, transit, or short drives. The cost of construction for new homes and businesses is moderate.

This scenario would be similar to the Whyte Avenue or 124th Street area.

3. There is mainly paid underground parking

Businesses and homes are located close together and neighbourhoods are very walkable. The cost of construction for new homes and businesses is relatively high. Commutes and errands can be done by walking, transit, or short drives.

This scenario would be similar to Downtown or the Oliver neighbourhood.

Preferred Parking Scenario

- The *free abundant surface parking* and *mix of free and paid parking* scenarios are preferred as the number one scenario by two-fifths of survey respondents.
- When taking into consideration the second choice, the *mix of free and paid parking* is the most preferred scenario.
- The scenario with mainly paid underground parking is the least preferred by survey respondents.

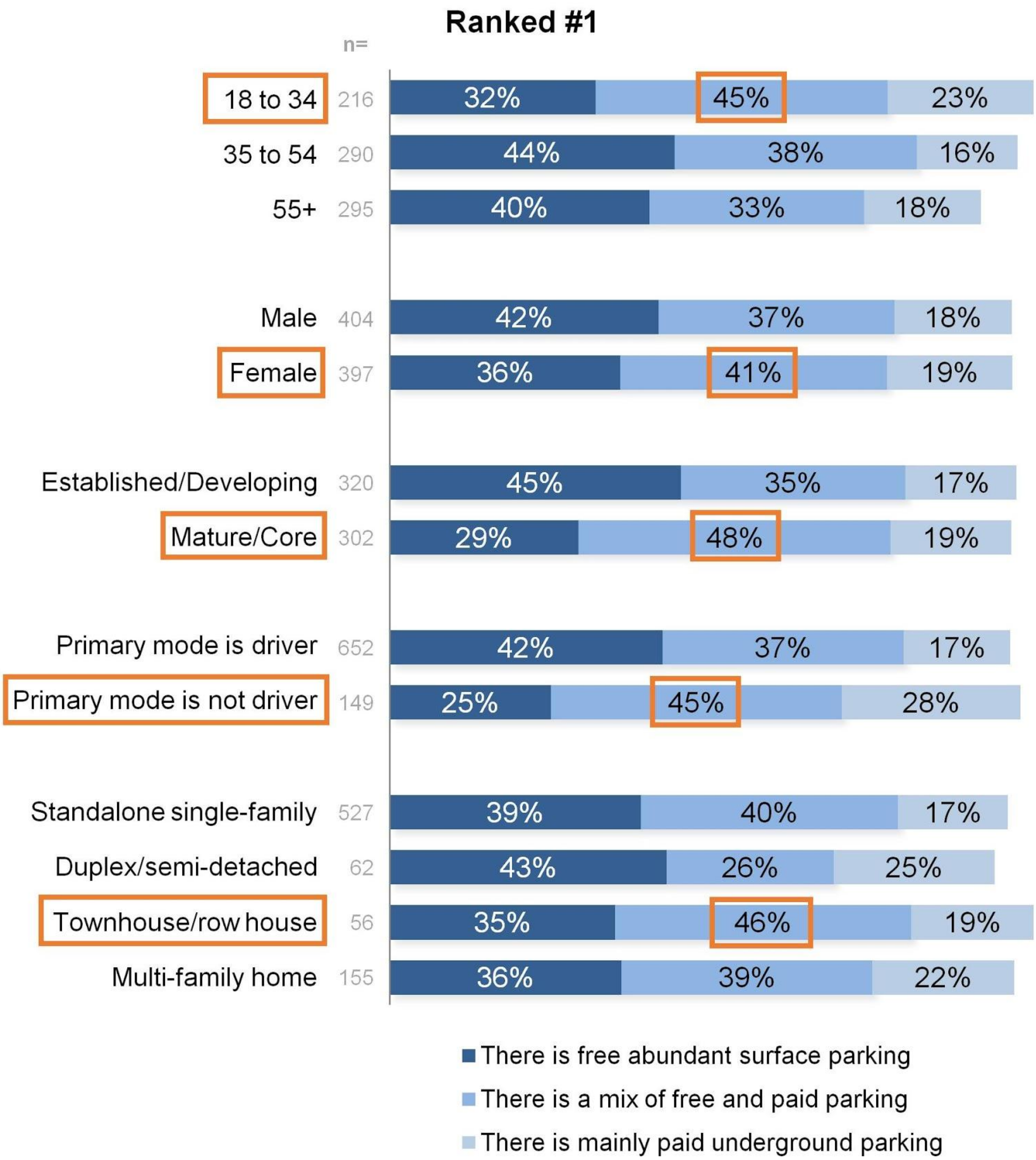
- A majority of individuals that selected the *free abundant surface parking* or *mainly paid underground parking* scenario as their first choice chose the *mix of free and paid parking* as their second choice.

	Abundant Surface Parking Ranked #1	Mix of Free/ Paid Parking Ranked #1	Mainly Paid Underground Parking Ranked #1
Abundant surface parking ranked #2	-	49%	36%
Mix of free/paid parking #2	**71%**	-	**64%**
Mainly paid underground parking #2	29%	51%	-
	n=321	*n=292*	*n=158*

B1 -- Thinking about how Edmonton should look and feel overall, I would like you to rank them from 1 to 3, with 1 being the most desirable. Base: All respondents (n=801)

Preferred Parking Scenario by Segment

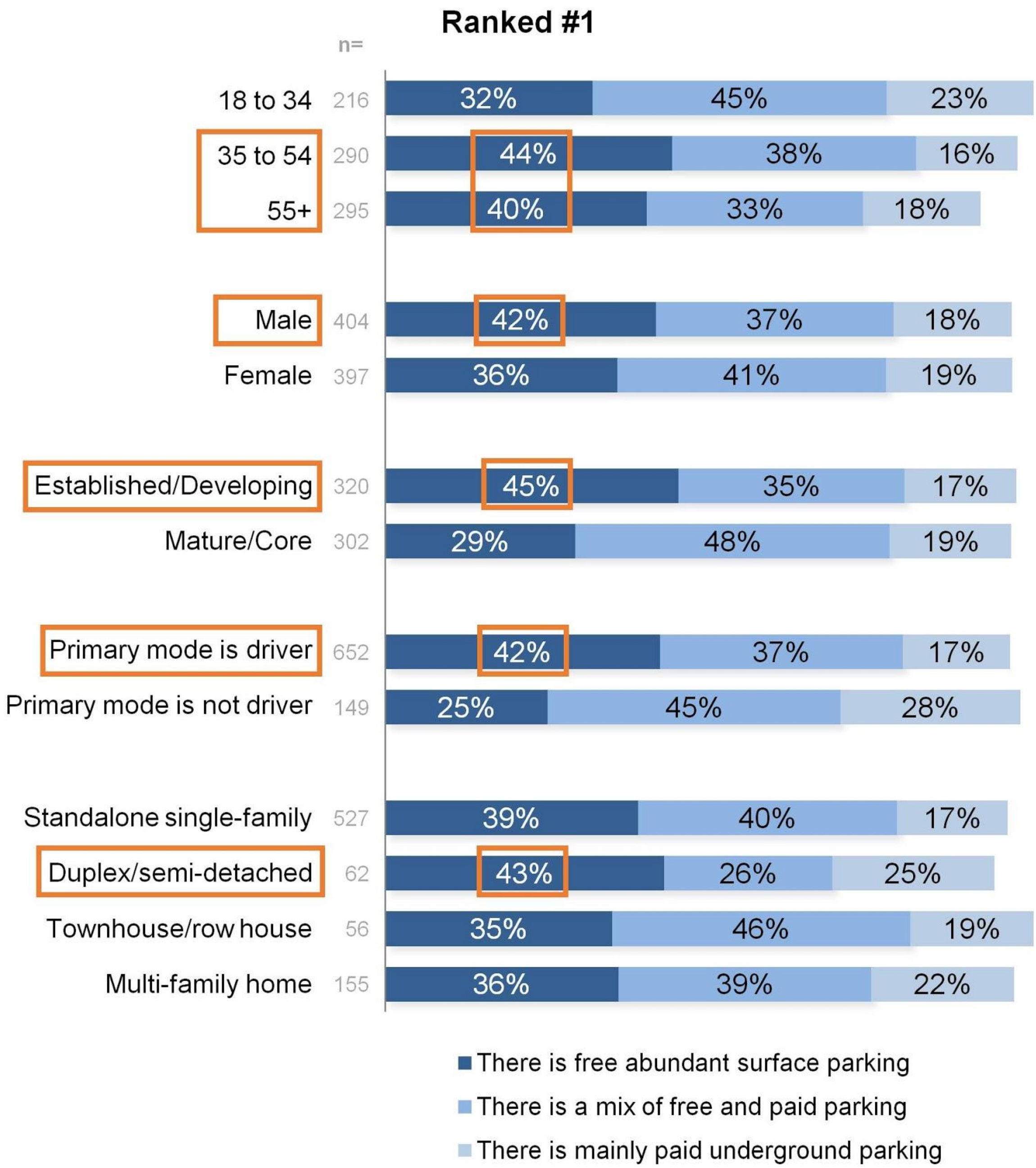
- Although the *free abundant surface parking* and *mix of free and paid parking* scenarios are each ranked first by the same proportion of survey respondents on aggregate, there are differences in scenario preference by segment.
- The *free and paid parking* scenario is preferred by those who are 18 to 34, female, live in a Mature/Core neighbourhood, do not drive as their primary mode of transportation, and/or live in a townhouse/row house.



B1 -- Thinking about how Edmonton should look and feel overall, I would like you to rank them from 1 to 3, with 1 being the most desirable. Base: All respondents (varies, see above)

Preferred Parking Scenario by Segment

- Although *mix of free and paid parking* is the most preferred parking scenario overall (looking at top 2 ranking), the *free abundant surface parking* scenario is preferred by those who are 35+, male, live in an Established/Developing neighbourhood, drive as their primary mode of transportation, and/or live in a duplex/semi-detached home .

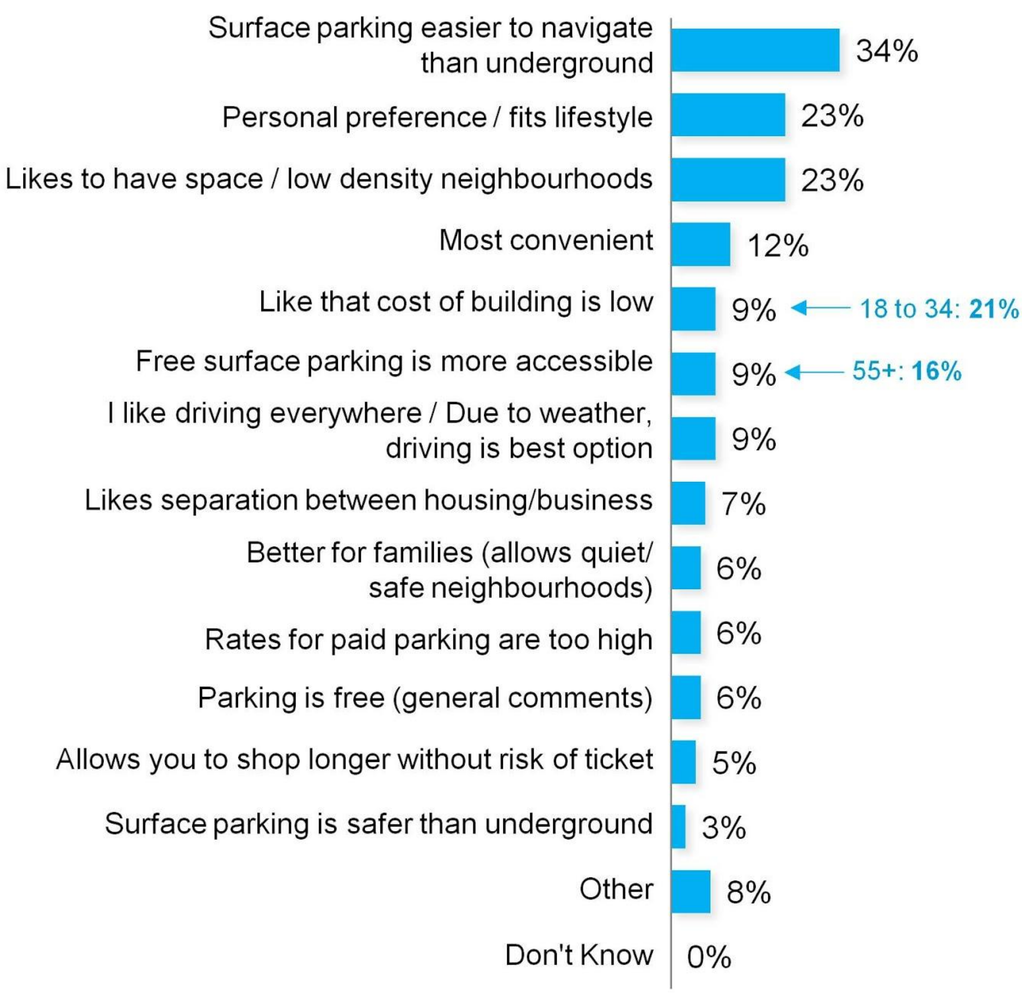


B1 -- Thinking about how Edmonton should look and feel overall, I would like you to rank them from 1 to 3, with 1 being the most desirable. Base: All respondents (varies, see above)

Reasons for Preferring Scenarios: *Free abundant surface parking*

- Those preferring the *free abundant surface parking* scenario do so because they prefer the easy-to-navigate surface parking over underground parking, due to personal preference, and because of the space it would provide.

Reasons Why Scenario is Most Desirable



There is free abundant surface parking. Businesses and homes are located further apart, which makes neighbourhoods less walkable and creates longer drives to work or errands. The construction cost of new homes and businesses is relatively low.

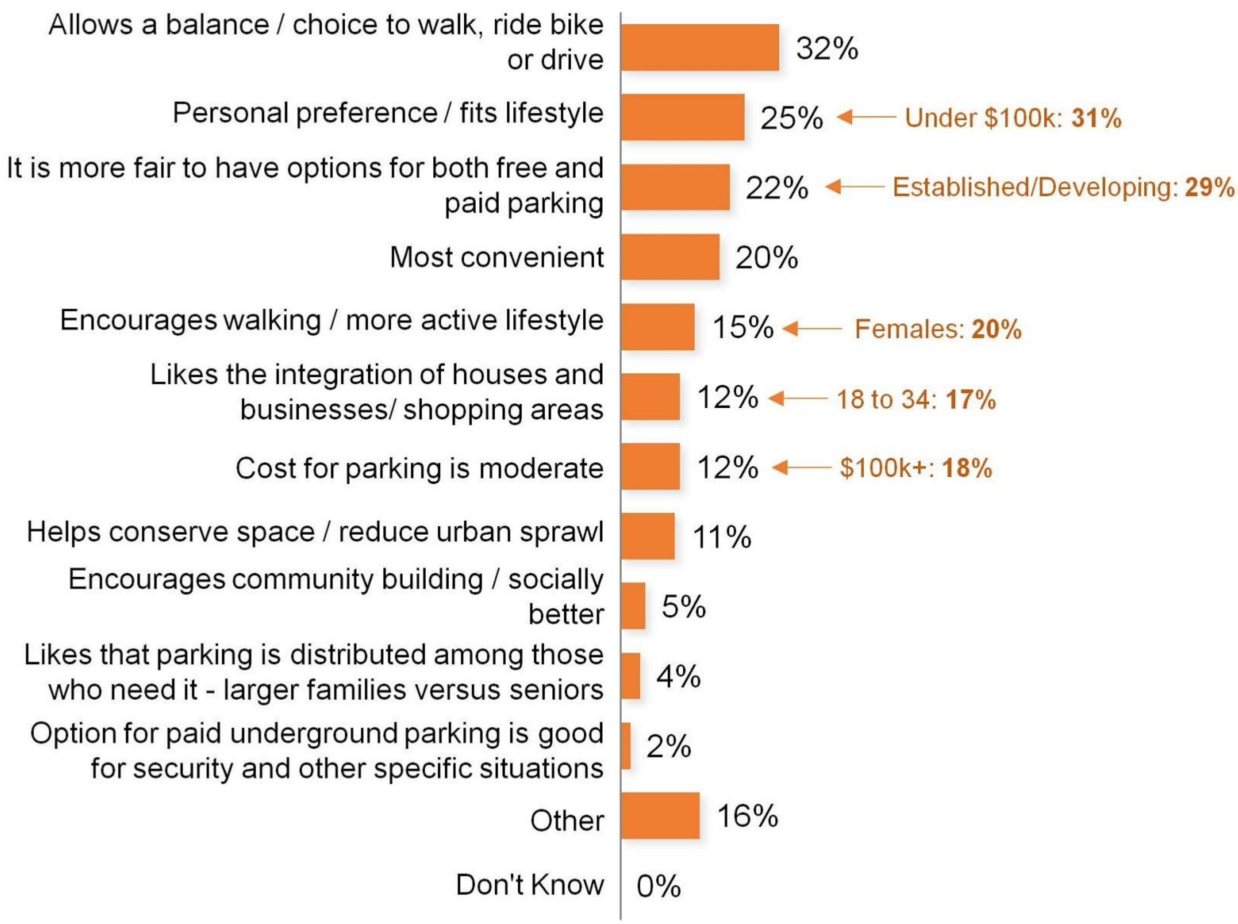
This scenario would be similar to an area like South Edmonton Common or a condo complex with a large surface parking lot.

B2_1 -- (There is free abundant surface parking...) Why did you select this scenario as being most desirable? Base: Ranked scenario 1st (n=313)

Reasons for Preferring Scenarios:
Mix of free and paid parking

- Those preferring the *mix of free and paid parking* scenario do so because it allows for a balance between modes of transportation, personal preference, the fairness that having paid and free parking available, and the overall convenience of the scenario.

Reasons Why Scenario is Most Desirable



There is a mix of free and paid parking. Some businesses have surface parking lots, others have underground parking, and some have no parking at all. Large families may have three parking spaces at home, while a single senior may have none. Businesses and homes are located closer together and neighbourhoods are more walkable. Commutes and errands can be done by walking, transit, or short drives. The cost of construction for new homes and businesses is moderate.

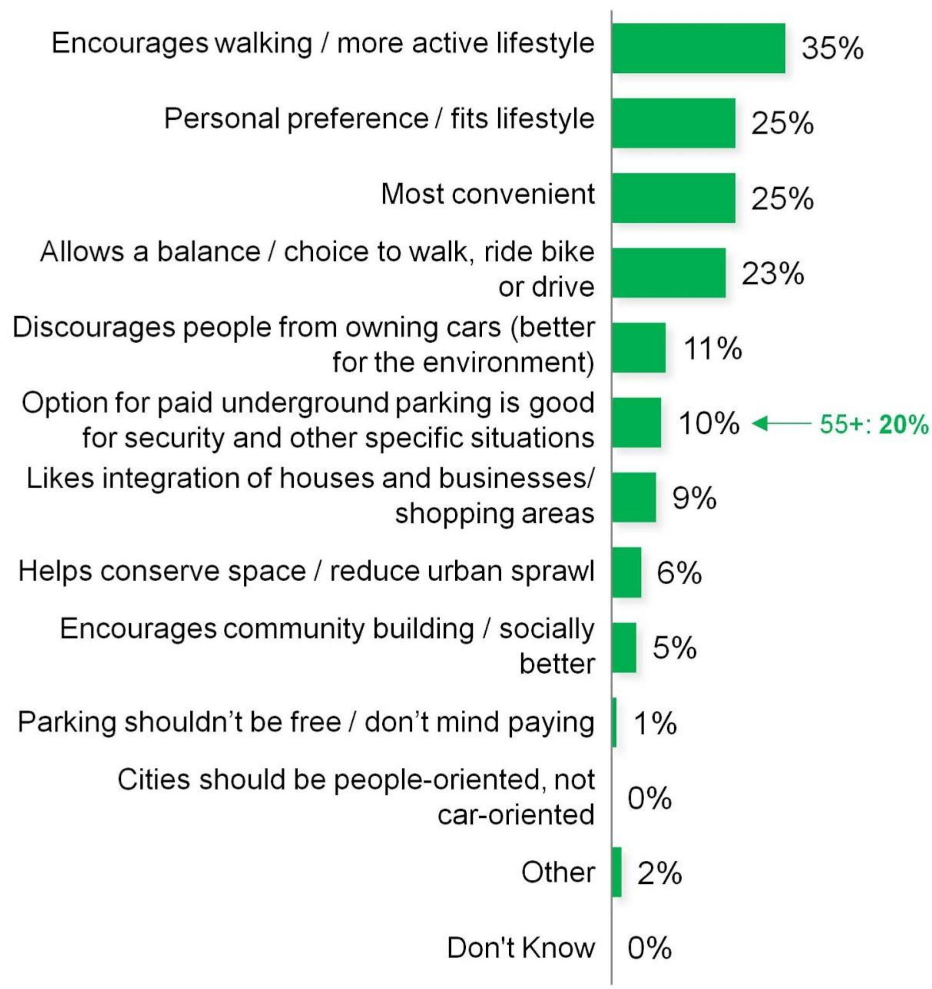
This scenario would be similar to the Whyte Avenue or 124th Street area.

B2_2 -- (Mix of free and paid parking...) Why did you select this scenario as being most desirable? Base: Ranked scenario 1st (n=288)

Reasons for Preferring Scenarios: *Mainly paid underground parking*

- Those preferring the *mainly paid underground parking* scenario do so because it would encourage people to walk more as a mode of transportation, due to personal preference, convenience, and because it offers a balance between modes of transportations.

Reasons Why Scenario is Most Desirable



There is mainly paid underground parking. Businesses and homes are located close together and neighbourhoods are very walkable. The cost of construction for new homes and businesses is relatively high. Commutes and errands can be done by walking, transit, or short drives.

This scenario would be similar to Downtown or the Oliver neighbourhood.

B2_1 -- (Mainly paid underground parking...) Why did you select this scenario as being most desirable? Base: Ranked scenario 1st (n=152)

Parking Regulations Scenarios:
General Public vs. Open Survey

	General Public	Open Survey
Parking Scenario Ranking *(Ranked 1st)*		
There is free abundant surface parking	**39%↑**	22%
There is a mix of free and paid parking	39%	**52%↑**
There is mainly paid underground parking	19%	**26%↑**
Reasons Why "Free Abundant Surface Parking" is Most Desirable		
Surface parking easier to navigate than underground	**34%↑**	8%
Parking is free (general comments)	6%	**24%↑**
I like driving everywhere / due to weather, driving is only option	9%	**18%↑**
Reasons Why "Mix of Free and Paid Parking" is Most Desirable		
Allows a balance / choice to walk, ride bike or drive	32%	**49%↑**
Encourages walking / more active lifestyle	15%	**30%↑**
Most convenient	**20%↑**	4%
Cost for parking is moderate	**12%↑**	5%
Likes that parking is distributed among those who need it - larger families versus seniors	4%	**11%↑**
Encourages community building / socially better	5%	**9%↑**
Reasons Why "Mainly Paid Underground Parking" is Most Desirable		
Encourages walking / more active lifestyle	35%	**52%↑**
Helps conserve space / reduce urban sprawl	6%	**25%↑**
Most convenient	**25%↑**	5%
Encourages community building / socially better	5%	**19%↑**
Parking shouldn't be free / don't mind paying for parking	1%	**9%↑**
Other	2%	**15%↑**

Detailed Findings:
Parking Regulation Outcomes

Note on Importance of Outcomes

Respondents were presented with a subset of different outcomes that are influenced by parking and asked to indicate their preferred outcome. The ranking of outcomes shown on the next page is a ratio scale.

Respondents were first asked to rate the importance of each parking outcome individually (i.e., 5-point scale of Not at all important to Very important). This is there their stated importance. They were then presented with a sets of three outcomes and asked to select the most important of those three outcomes. This information is the derived importance.

This report focuses on the derived importance, as this analysis forces people to prioritize their preferences and displays the magnitude of preference for one outcome over another.

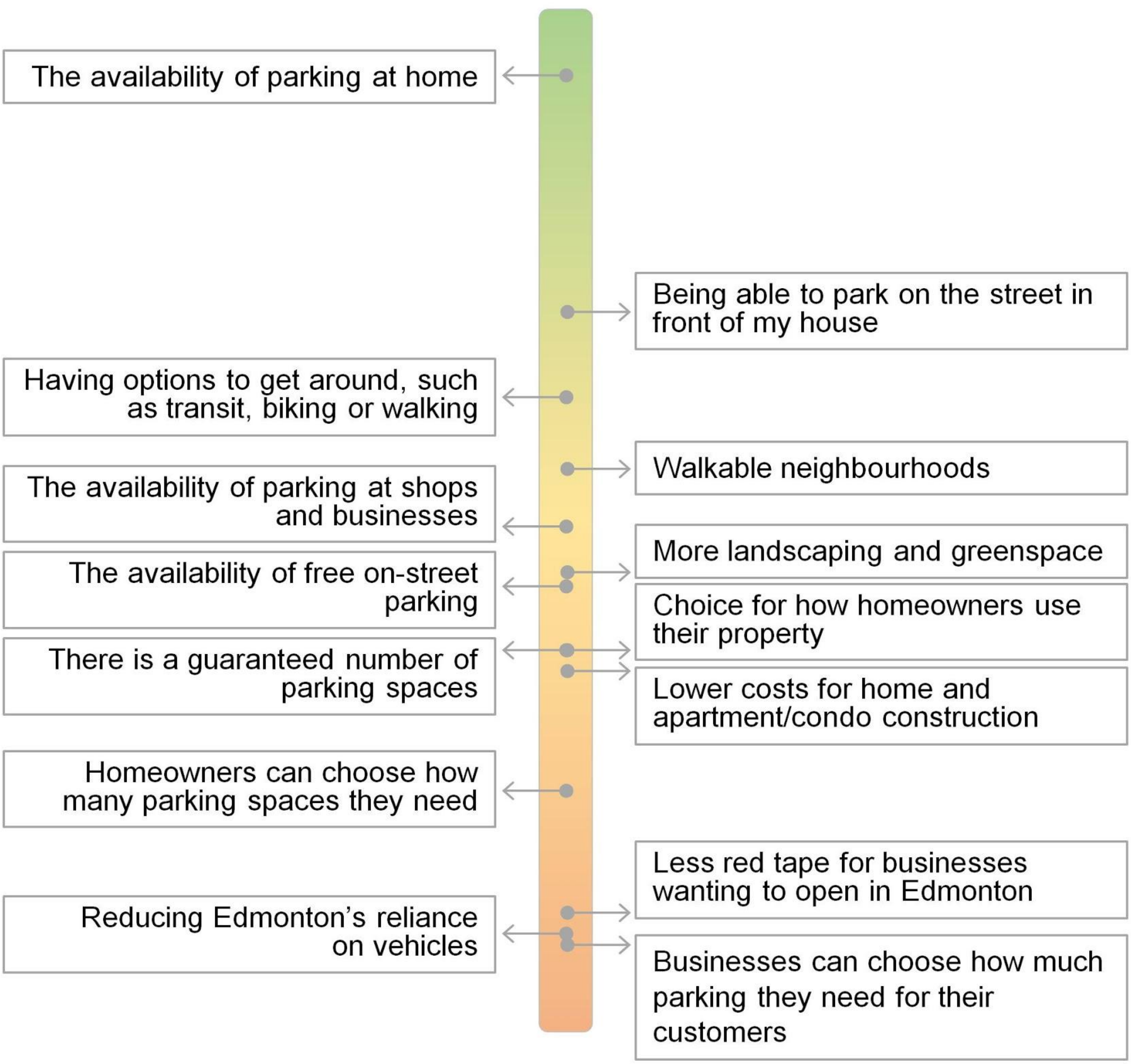
With stated importance, individuals can provide the same stated importance rating to multiple outcomes, which does not provide relative information about how important an outcome is compared to others. Individuals can also differ in their interpretation of the stated importance scale - for example, one person's very important might be simply important to someone else. These are additional reasons why the focus in this report is on the derived importance over stated importance.

The derived importance results are not percentages, but reflect the points on a relative scale. The difference between two derived importance values reflects the magnitude of greater importance placed on one parking outcome compared to another.

Derived Importance of Outcomes

- Survey respondents are most concerned with the availability of parking at home. Other important regulation outcomes are being able to park on the street at home, having transportation options, and walkable neighbourhoods.
- Outcomes that are less important to survey respondents include businesses being able to choose how much parking to offer, reducing the reliance on vehicles, and reducing red tape faced by new businesses.

Importance of Each Parking Regulation Outcome



B3 -- Tell me how important each outcome or result is to you. Base: All respondents (n=801)

Derived Importance of Outcomes: Scenario Preference

- Preferences for parking scenarios generally align with preferences for parking regulation outcomes.
- Having options to get around and walkable neighbourhoods are more important to those favouring the *mix of free/paid parking* and *mainly paid underground parking* scenarios, and less important to those who favour the *abundant surface parking* scenario.
- On-street parking is less important to those favouring the *mainly paid underground parking* scenario.

	Abundant Surface Parking #1	Mix of Free/Paid Parking #1	Mainly Paid Underground Parking #1
Importance of Each Parking Regulation Outcome			
The availability of parking at home	55	56	57
Being able to park on the street in front of my house	46	48	38
Having options to get around, such as transit, biking or walking	34	49	47
Walkable neighbourhoods	29	47	46
The availability of parking at shops and businesses	39	37	30
More landscaping and greenspace	36	31	40
The availability of free on-street parking	39	32	27
Choice for how homeowners use their property	34	27	30
There is a guaranteed number of parking spaces	33	30	29
Lower costs for home and apartment/condo construction	33	29	28
Homeowners can choose how many parking spaces they need	28	22	23
Less red tape for businesses wanting to open in Edmonton	21	21	20
Reducing Edmonton's reliance on vehicles	11	25	29
Businesses can choose how much parking they need for their customers	18	17	22
	n=321	*n=292*	*n=158*

Most Important ← → Least Important

B3 -- Tell me how important each outcome or result is to you. Base: All respondents (n=801)

Derived Importance of Outcomes: Neighbourhood

- There are few differences in the preference of parking regulations across neighbourhoods – with the exception that walkable neighbourhoods has greater appeal among those living in Mature/Core areas.

Importance of Each Parking Regulation Outcome	Established/ Developing	Mature/Core	Other/ Industrial
The availability of parking at home	58	54	52
Being able to park on the street in front of my house	42	48	47
Having options to get around, such as transit, biking or walking	40	45	40
Walkable neighbourhoods	35	43	37
The availability of parking at shops and businesses	37	35	37
More landscaping and greenspace	37	32	34
The availability of free on-street parking	35	32	34
Choice for how homeowners use their property	34	29	30
There is a guaranteed number of parking spaces	33	30	29
Lower costs for home and apartment/condo construction	33	29	29
Homeowners can choose how many parking spaces they need	25	23	30
Less red tape for businesses wanting to open in Edmonton	22	18	21
Reducing Edmonton's reliance on vehicles	19	21	17
Businesses can choose how much parking they need for their customers	18	18	22
	n=320	*n=302*	*n=179*

Most Important ← → Least Important

B3 -- Tell me how important each outcome or result is to you. Base: All respondents (n=801)

Derived Importance of Outcomes: Age

- Parking outcome preferences differ somewhat by age. Availability of parking at home is particular important to those who are 35 to 54 (and least important to those who are 55+), while the availability of parking at businesses is more important to those who are 55+ than their younger counterparts.
- Increased landscaping/greenspace and reducing reliance on vehicles is more important to those who are 18 to 34 and less important to those who are 55+.

	18 to 34	35 to 54	55+
Importance of Each Parking Regulation Outcome			
The availability of parking at home	55	62	48
Being able to park on the street in front of my house	43	45	47
Having options to get around, such as transit, biking or walking	46	42	38
Walkable neighbourhoods	42	36	39
The availability of parking at shops and businesses	32	32	43
More landscaping and greenspace	40	36	29
The availability of free on-street parking	31	33	37
Choice for how homeowners use their property	34	33	27
There is a guaranteed number of parking spaces	31	29	34
Lower costs for home and apartment/condo construction	32	35	24
Homeowners can choose how many parking spaces they need	26	27	23
Less red tape for businesses wanting to open in Edmonton	19	19	22
Reducing Edmonton's reliance on vehicles	28	20	13
Businesses can choose how much parking they need for their customers	14	20	22
	n=216	*n=290*	*n=295*

Most Important ← → Least Important

B3 -- Tell me how important each outcome or result is to you. Base: All respondents (n=801)

ADVANIS

Derived Importance of Outcomes: Gender

- The top parking regulation outcomes are valued similarly by both males and females.
- The choice for how homeowners use their property and the desire for less red tape for businesses wanting to open in Edmonton are more important to Males than their Female counterparts.

	Male	Female
Importance of Each Parking Regulation Outcome		
The availability of parking at home	54	56
Being able to park on the street in front of my house	44	46
Having options to get around, such as transit, biking or walking	38	45
Walkable neighbourhoods	38	40
The availability of parking at shops and businesses	36	37
More landscaping and greenspace	35	34
The availability of free on-street parking	34	34
Choice for how homeowners use their property	35	27
There is a guaranteed number of parking spaces	30	33
Lower costs for home and apartment/condo construction	29	32
Homeowners can choose how many parking spaces they need	27	23
Less red tape for businesses wanting to open in Edmonton	25	15
Reducing Edmonton's reliance on vehicles	18	21
Businesses can choose how much parking they need for their customers	20	18
	n=404	*n=397*

Most Important ←→ Least Important

B3 -- Tell me how important each outcome or result is to you. Base: All respondents (n=801)

Derived Importance of Outcomes: Primary Driver

- Survey respondents who do not primarily drive place greater importance on having options to getting around. The next most important outcome to this group is walkable neighbourhoods.
- This differs from primary drivers who tend to value available parking at home, as well as street parking in front of their home.

	Primarily Driver	Primarily NOT Driver
Importance of Each Parking Regulation Outcome		
The availability of parking at home	58	41
Being able to park on the street in front of my house	47	37
Having options to get around, such as transit, biking or walking	35	70
Walkable neighbourhoods	37	48
The availability of parking at shops and businesses	38	30
More landscaping and greenspace	34	38
The availability of free on-street parking	36	24
Choice for how homeowners use their property	33	23
There is a guaranteed number of parking spaces	31	33
Lower costs for home and apartment/condo construction	30	33
Homeowners can choose how many parking spaces they need	27	19
Less red tape for businesses wanting to open in Edmonton	21	15
Reducing Edmonton's reliance on vehicles	17	31
Businesses can choose how much parking they need for their customers	21	12
	n=652	*n=149*

Most Important ⟷ Least Important

B3 -- Tell me how important each outcome or result is to you. Base: All respondents (n=801)

Derived Importance of Outcomes: Dwelling

- The most important outcomes to those living in multi-family homes are having a variety of choices to get around, parking at home, and walkable neighbourhoods.
- The choice of how homeowners use their property is most important to those living in standalone single family dwellings.

	Standalone single family	Duplex/semi-detached	Multi-family home
Importance of Each Parking Regulation Outcome			
The availability of parking at home	55	63	50
Being able to park on the street in front of my house	50	42	32
Having options to get around, such as transit, biking or walking	38	37	58
Walkable neighbourhoods	37	38	46
The availability of parking at shops and businesses	37	31	39
More landscaping and greenspace	35	35	31
The availability of free on-street parking	34	32	36
Choice for how homeowners use their property	36	24	20
There is a guaranteed number of parking spaces	30	33	34
Lower costs for home and apartment/condo construction	28	36	34
Homeowners can choose how many parking spaces they need	28	29	14
Less red tape for businesses wanting to open in Edmonton	20	18	25
Reducing Edmonton's reliance on vehicles	16	26	27
Businesses can choose how much parking they need for their customers	20	20	15
	n=527	*n=118*	*n=155*

Most Important ↔ Least Important

B3 -- Tell me how important each outcome or result is to you. Base: All respondents (n=801)

Derived Importance of Outcomes:
General Public vs. Open Survey

Importance of Each Parking Regulation Outcome	General Public	Open Survey
The availability of parking at home	55	47
Being able to park on the street in front of my house	45	37
Having options to get around, such as transit, biking or walking	42	50
Walkable neighbourhoods	39	51
The availability of parking at shops and businesses	36	31
More landscaping and greenspace	34	31
The availability of free on-street parking	34	30
Choice for how homeowners use their property	31	24
There is a guaranteed number of parking spaces	31	28
Lower costs for home and apartment/condo construction	30	22
Homeowners can choose how many parking spaces they need	25	24
Less red tape for businesses wanting to open in Edmonton	20	23
Reducing Edmonton's reliance on vehicles	19	38
Businesses can choose how much parking they need for their customers	19	23
	n=801	*n=796*

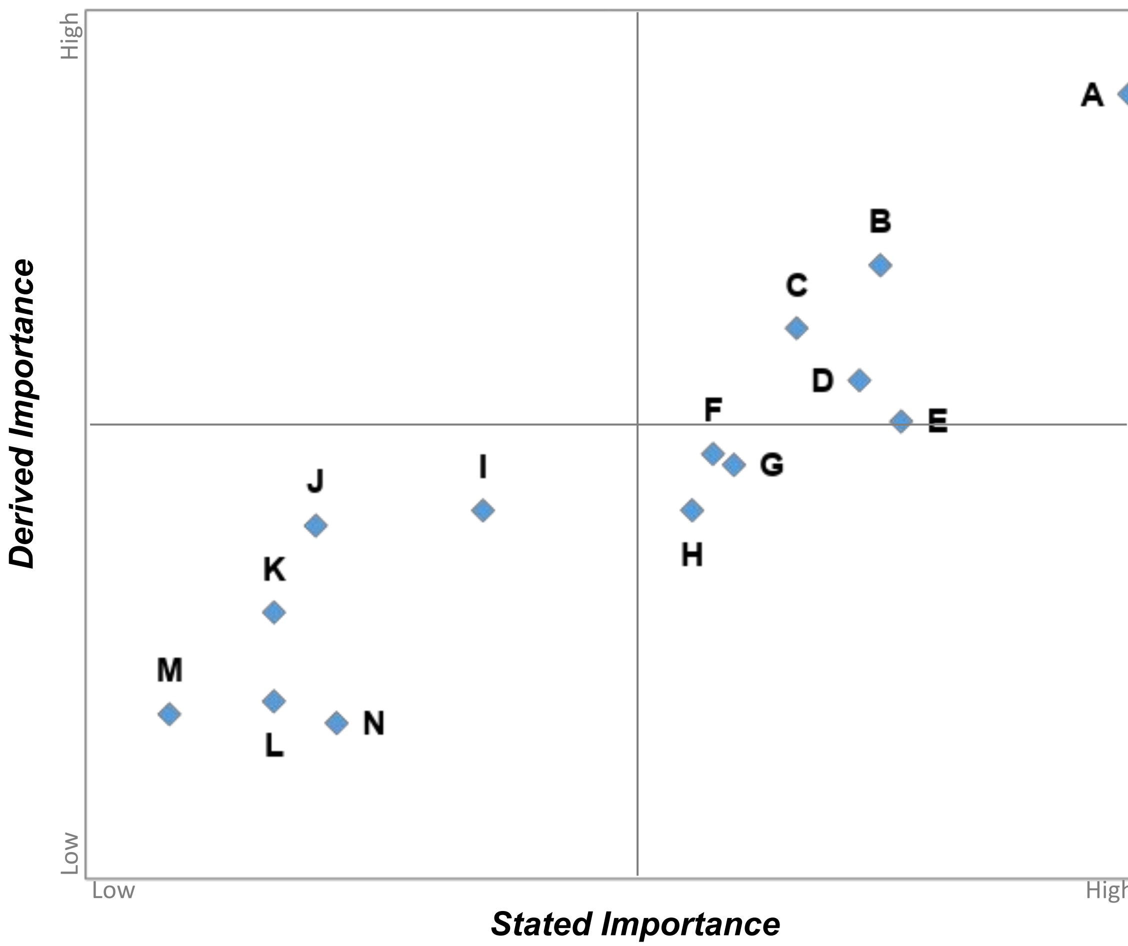
Most Important ↔ Least Important

B3 -- Tell me how important each outcome or result is to you. Base: All respondents (General Public n=801; Open Survey n=796)

Appendix

Comparison of Derived Importance and Stated Importance of Outcomes

- The order of parking outcomes is similar when comparing the derived importance results with the stated importance results.



A - The availability of parking at home	**H** - Choice for how homeowners use their property
B - Being able to park on the street in front of house	**I** - There is a guaranteed number of parking spaces
C - Having options to get around	**J** - Lower costs for home and apartment/condo construction
D - Walkable neighbourhoods	**K** - Homeowners can choose how many spaces they need
E - The availability of parking at shops /businesses	**L** - Less red tape for businesses wanting to open
F - More landscaping and greenspace	**M** - Reducing Edmonton's reliance on vehicles
G - The availability of free on-street parking	**N** - Businesses can choose how much parking they need

B3 -- Tell me how important each outcome or result is to you. Base: All respondents (n=801)

Stated Importance of Outcomes: General Public vs. Open Survey

	General Public	Open Survey
Importance of Each Parking Regulation Outcome		
The availability of parking at home	**90%↑**	74%
The availability of parking at shops and businesses	**79%↑**	57%
Being able to park on street in front of my house	**78%↑**	56%
Walkable neighbourhoods	77%	76%
Having options to get around, such as transit, biking or walking	74%	76%
The availability of free on-street parking	**71%↑**	55%
More landscaping and greenspace	70%	70%
Choice for how homeowners use their property	**69%↑**	54%
A set number of parking spaces are provided for all homes and businesses	**59%↑**	39%
Businesses can choose how much parking they need for their customers	52%	47%
It costs less to build new homes, apartments, and condos	**51%↑**	36%
Homeowners can choose how many parking spaces they need	49%	45%
Less red tape for businesses wanting to open in Edmonton	49%	54%
Reducing Edmonton's reliance on vehicles	44%	**55%↑**
	n=801	*n=796*

B3 -- Tell me how important each outcome or result is to you.

Demographics

The following tables show the demographic breakdown of the general public respondents and open survey respondents.

	General Public	Open Survey
Can you please tell me which of the following age categories you fall into?		
NET 18-34	**35%↑**	28%
NET 35-54	35%	**42%↑**
NET 55+	30%	27%
18 to 24	**10%↑**	4%
25 to 34	25%	24%
35 to 44	17%	**26%↑**
45 to 54	17%	16%
55 to 64	13%	**19%↑**
65 or older	**17%↑**	8%
DK/Refused	0%	3%
With which gender do you identify?		
Male	**50%↑**	41%
Female	50%	54%
Other	0%	0%
DK/Refused	0%	5%
Do you own or rent your current residence?		
Own	73%	**81%↑**
Rent	**26%↑**	17%
DK/Refused	1%	**2%↑**
	n=801	*n=796*

Int5b -- Can you please tell me which of the following age categories you fall into?
Int6 -- With which gender do you identify?
C4 – Do you own or rent your current residence?

Demographics

	General Public	Open Survey
How would you rate the access to public transit where you live?		
NET Poor	15%	17%
NET Good	62%	57%
1 - Little to no public transit service in my area	5%	5%
2	10%	12%
3	18%	**23%↑**
4	24%	27%
5 - Very good public transit service in my area	**39%↑**	31%
DK/Refused	4%	3%
What type of home do you live in?		
Standalone single family	68%	67%
Multi-family home (apartment or condo building)	18%	**23%↑**
Duplex / semi-detached	7%	6%
Townhouse or row house	**6%↑**	4%
Other	0%	0%
DK/Refused	0%	0%
	n=801	*n=796*

C1 -- How would you rate the access to public transit where you live?
C2 – What type of home do you live in?

Demographics

	General Public	Open Survey
How many years have you lived in your current residence?		
Mean (years)	12.5	11.0
5 or fewer years	40%	44%
6 to 10 years	16%	16%
11 to 20 years	24%	21%
21 or more years	19%	16%
DK/Refused	0%	4%
Including yourself, how many people are in your household?		
Mean (people)	**3.1↑**	2.7
One	14%	14%
Two	29%	**38%↑**
Three	18%	18%
Four	**22%↑**	14%
Five	**8%↑**	5%
Six or more	**7%↑**	3%
DK/Refused	0%	**6%↑**
Are there any people in your household who are less than 18 years old?		
Yes	**36%↑**	29%
No	64%	65%
DK/Refused	0%	**6%↑**
Are you a business owner with a shop front?		
Yes	3%	5%
No	**97%↑**	95%
DK/Refused	0%	1%
	n=801	*n=796*

C8_total -- Total number of people in household.
C8a – And how many people are there in your household who are less than 18 years old?
C6 – Are you a business owner with a shop front?

Demographics

	General Public	Open Survey
How long have you lived in Edmonton?		
Mean (years)	28.2	28.4
5 or fewer years	8%	9%
6 to 10 years	12%	10%
11 to 20 years	**21%↑**	16%
21 to 30 years	21%	18%
31 or more years	36%	41%
Prefer not to say	2%	**5%↑**
Which of the following categories best describes your total household income in 2017 before taxes?		
<$50k	**19%↑**	6%
$50k to $99,999	**30%↑**	25%
$100,000 to $149,999	19%	23%
$150,000+	15%	**22%↑**
DK/Refused	16%	**23%↑**
	n=801	*n=796*

C5 -- How long have you lived in Edmonton?
C10 – Which of the following categories best describes your total household income in 2017 before taxes?

Demographics

	General Public	Open Survey
What is the highest level of education you have completed?		
Elementary/grade school	**3%↑**	0%
High school	**26%↑**	7%
College/technical school	**27%↑**	20%
Undergraduate degree	27%	**39%↑**
Post-graduate degree	11%	**22%↑**
Professional school	3%	**6%↑**
DK/Refused	2%	**5%↑**
What is your current employment status?		
Employed full-time	49%	**62%↑**
Employed part-time	**12%↑**	6%
Self-employed	9%	8%
On contract	1%	2%
On leave	3%	2%
Unemployed	**7%↑**	2%
Retired	**17%↑**	12%
DK/Refused	1%	**6%↑**
	n=801	*n=796*

C11 -- What is the highest level of education you have completed?
C12 – What is your current employment status?

Demographics

	General Public	Open Survey
How many individuals in your household have a valid driver's license?		
Mean (individuals)	2.1	2.0
None	**2%↑**	1%
One	21%	21%
Two	49%	**57%↑**
Three or more	**27%↑**	17%
DK/Refused	0%	**4%↑**
Do you yourself have a valid driver's license?		
Yes	93%	94%
No	**7%↑**	2%
DK/Refused	0%	**4%↑**
	n=801	*n=796*
Where does your household most often park your vehicles?		
In your garage	57%	54%
On your driveway	**41%↑**	28%
On the street	**37%↑**	31%
Your assigned parking space	19%	21%
Other	**2%↑**	0%
Prefer not to say	0%	0%
	n=776	*n=770*

C9 -- How many individuals in your household have a valid driver's license? Please include yourself.
C9a – Do you yourself have a valid driver's license?
A2c – Where does your household most often park your vehicles?

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