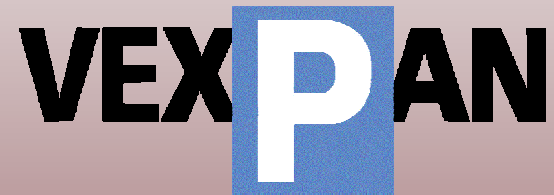


Vexpan Customer Parking Survey 2010



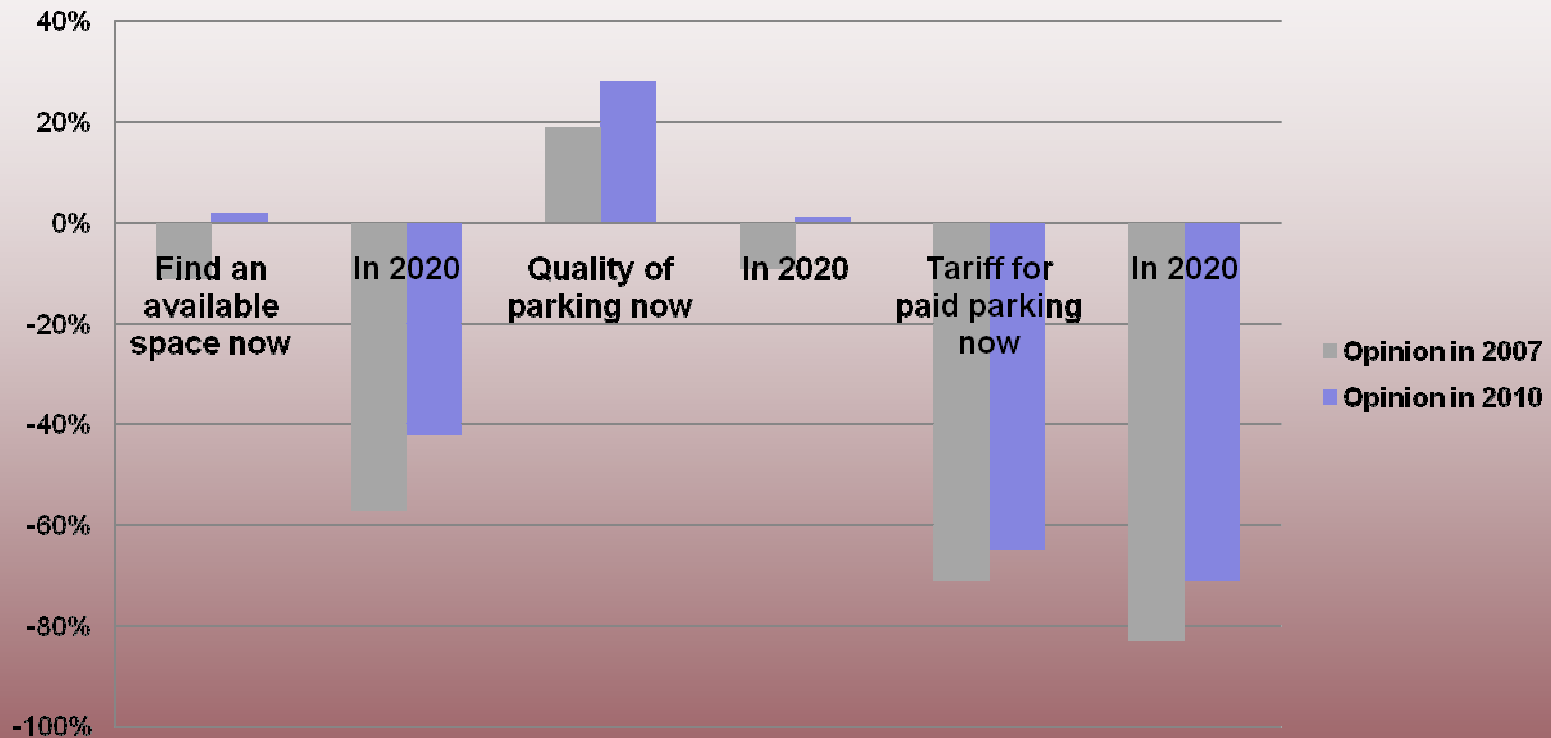
Approach

- Execution by survey agent Trendbox
- Partially new, partially comparison with 2007
- Internet panel
- Statistical representation
- Persons owning a car
- Net 504 questionnaires

Content

- Satisfaction and comparison with 2007
- Use and attitude
- Requirements for parking
- Parking dilemmas
- Parking propositions
- If parking is getting too expensive.....
- Tariff stimulus
- Payment per minute

Rating and comparison with 2007



Ratio = % good & very good -/- % poor & very poor

Rating and comparison 2007

- Availability and quality better rated than in 2007
- Future is considered less negative
- Even tariffs are rated milder, even though parking rates increased more than inflation

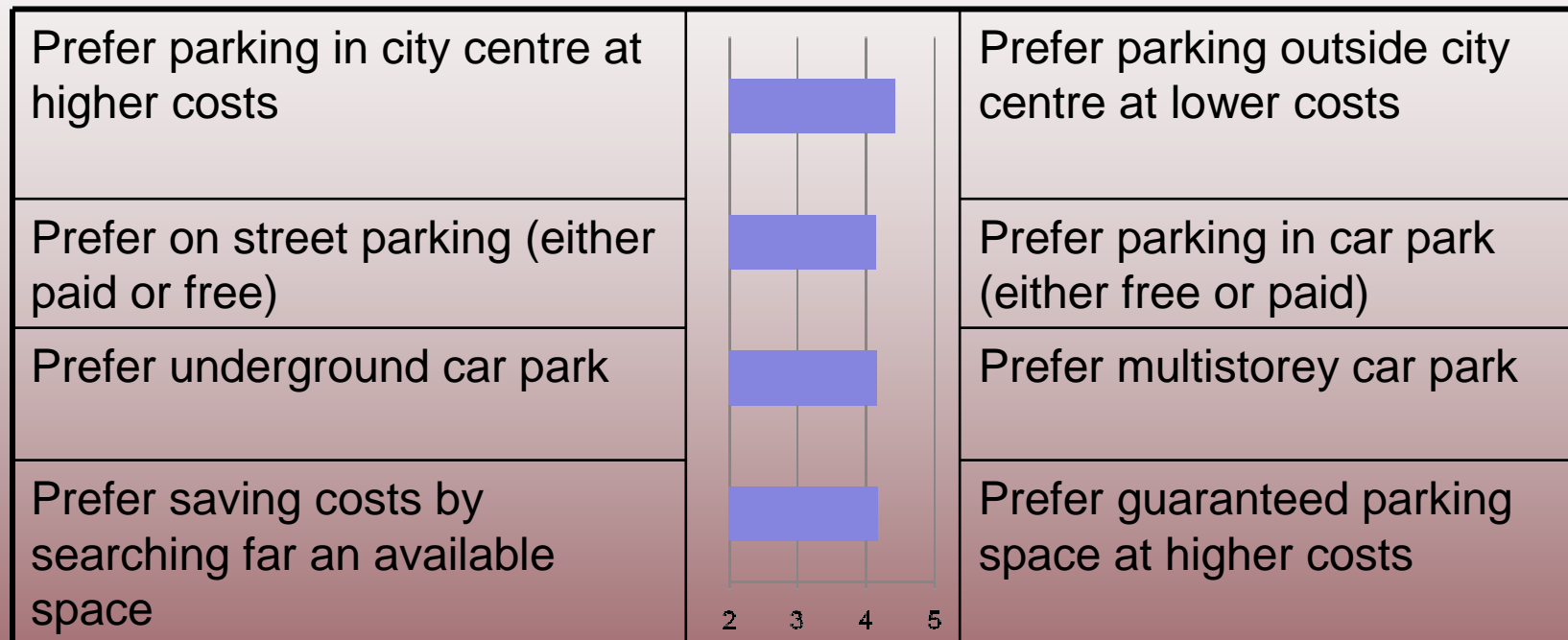
Use of parking and attitude

- Paid parking most used at shopping and leisure
- Here parking is most frequent rated as too expensive
- Tarrifs are no bigger dissatisfier than in 2007
- Over 50% of the respondents do not know the cost of parking at residential or working place
- While shopping an hourly rate of €1.50 is more or less acceptable

Requirements for parking

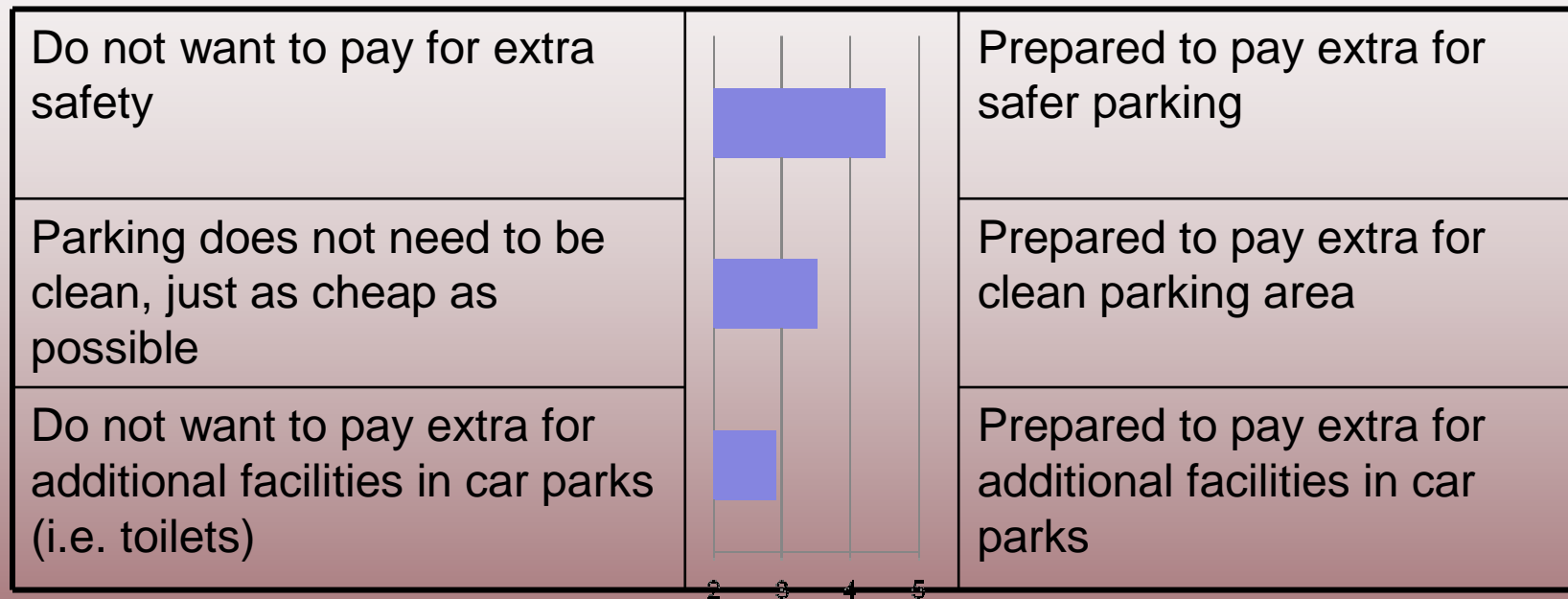
At residential, work, family & friends	Free, always available, close and safe
At run shopping	Close, free, always available, safe and easy parking bays
At shopping, leisure and business	Safe, always available, close, easy parking bays, easy payment Free outside top ten requirements
Residents in large cities value free parking more than safe & clean.	

Parking Dilemmas - 1



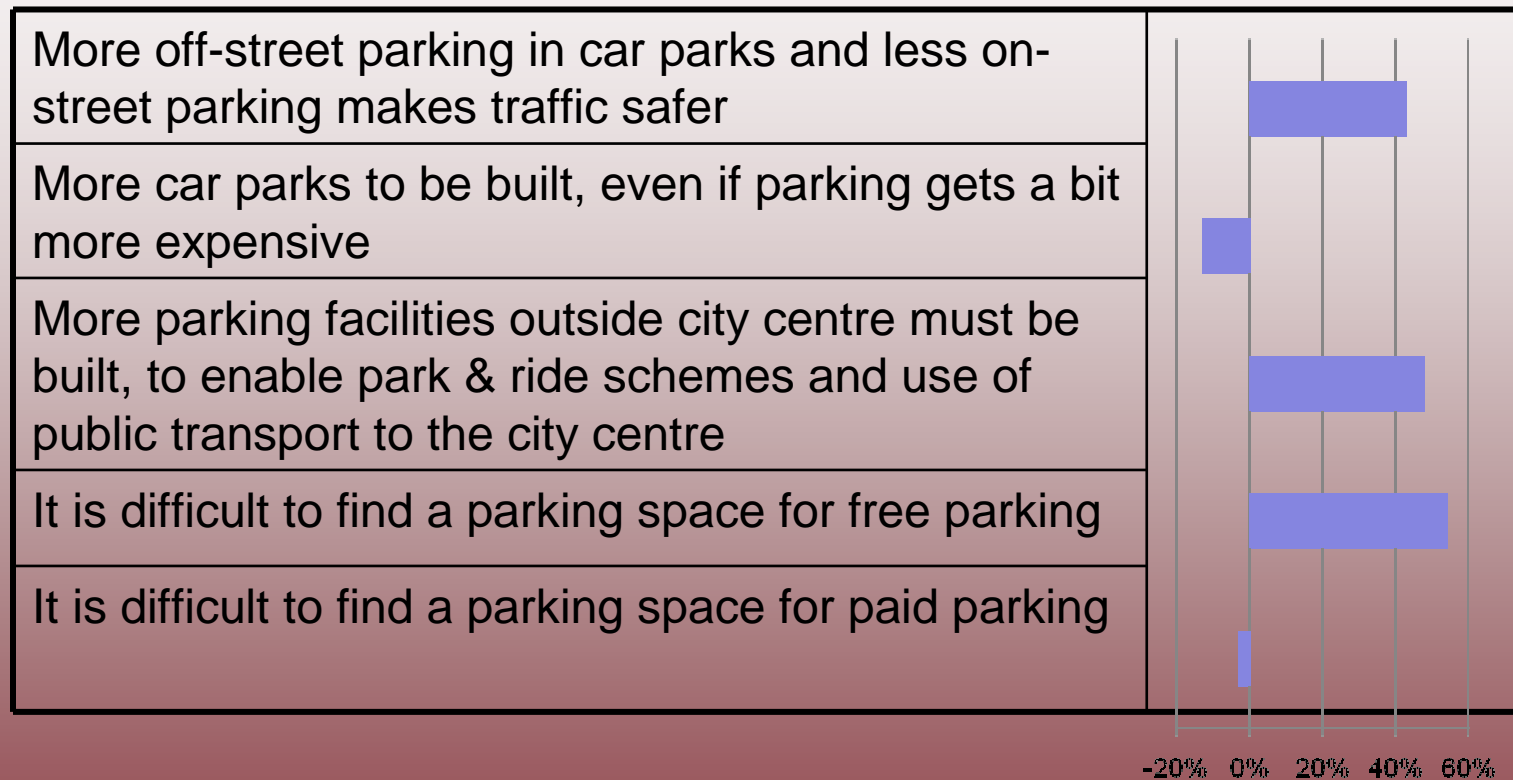
Averages on a scale 1 – 7, 4 is indifferent.

Parking Dilemmas - 2



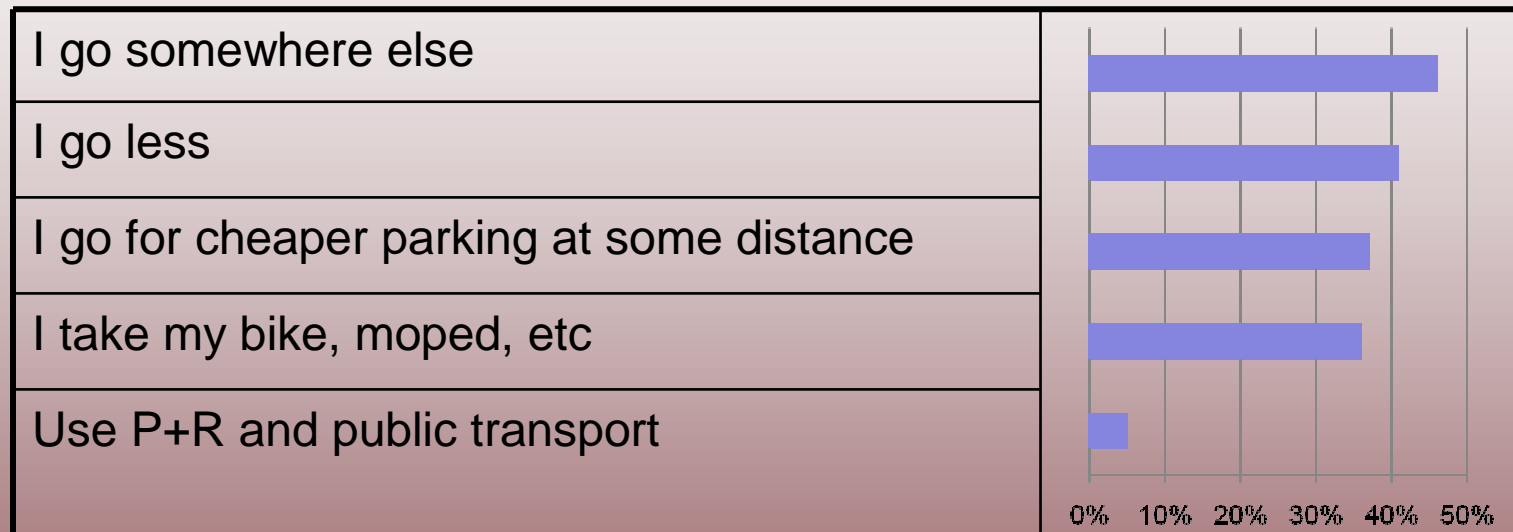
Averages on a scale 1 – 7, 4 is indifferent.

Parking Proposals



Ratio = % agree -/- % disagree

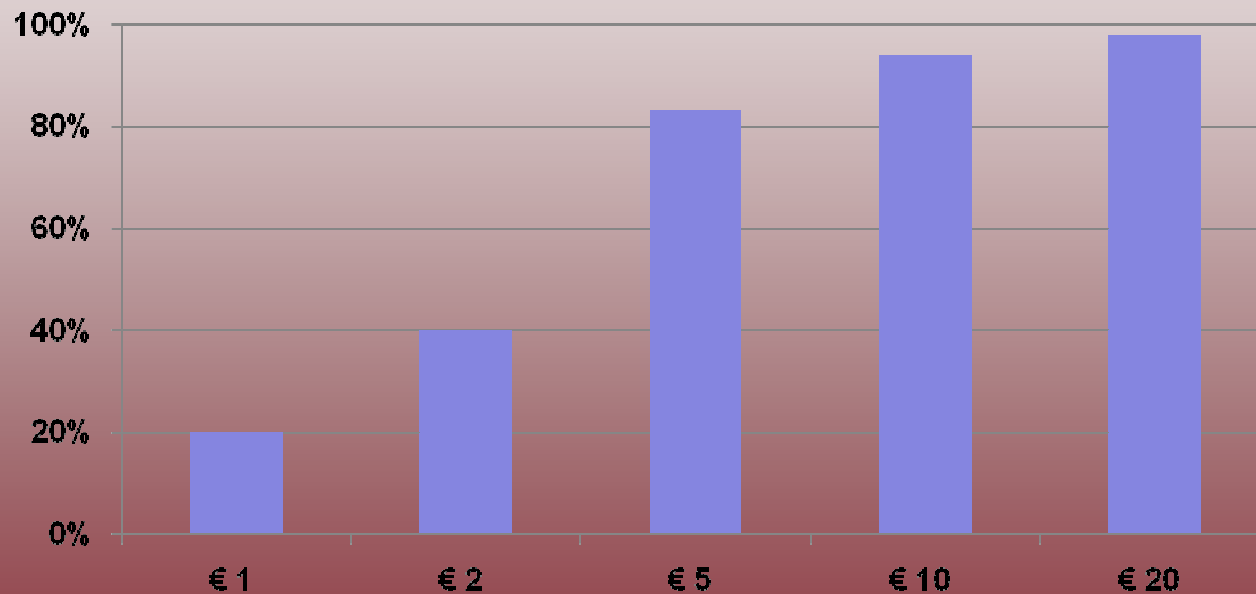
If parking is getting too expensive.....



Ratio = agree -/- % disagree

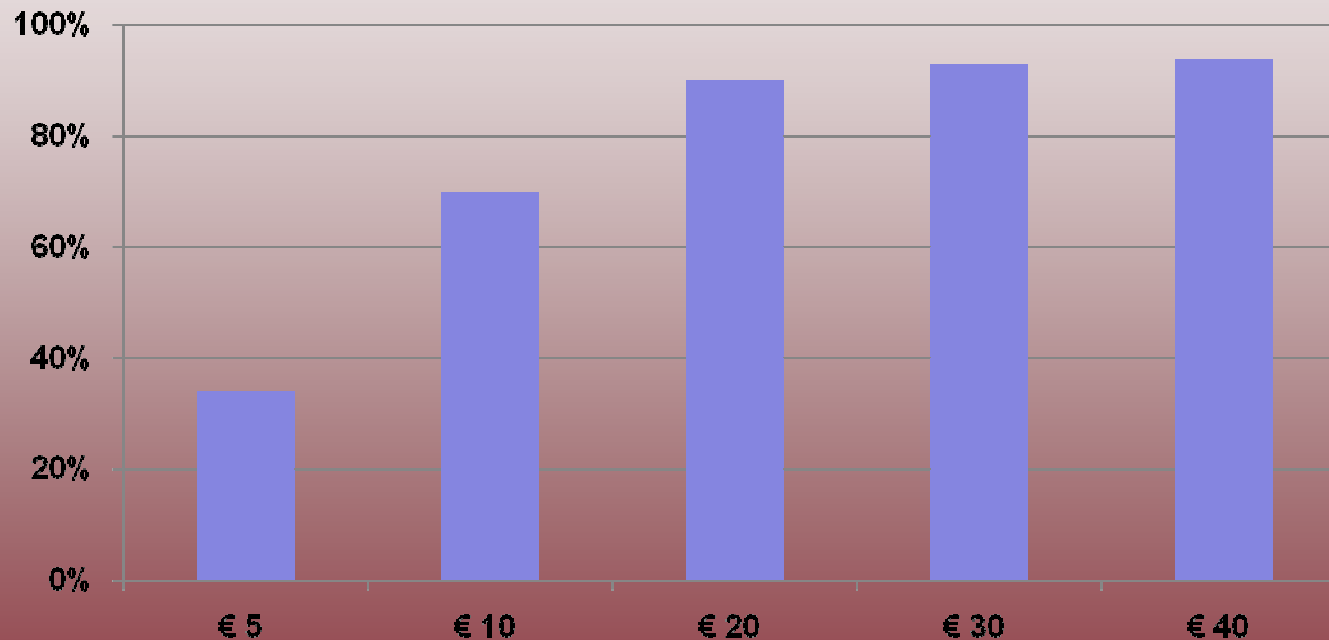
Tariff Stimulus 1

- I will choose cheaper parking at about 1 kilometre (15 minutes walking distance) at a price difference of:



Tariff Stimulus 2

- If I go to the city centre I will take public transport if a day parking costs more than:



Payment per minute

- Which payment method do you prefer?
 - € 1.00 per hour: 21%
 - € 0.02 per minute: 79%
- And what if tariffs are on a higher level?
 - € 3.00 per hour: 17%
 - € 0.06 per minute: 83%

