

Soaring Sales of Larger Sport Utility Vehicles Are Changing Vehicle Mix

By Mary S. Smith

As part of the continuing effort to monitor vehicle sizes and their impact on parking design, Walker Parking Consultants annually evaluates the Automotive News Market Data for vehicle size trends. Using the Parking Consultants Council classification system, vehicles are classified by size, with Classes 5 through 7 being considered "small" and appropriate for parking in the traditional small-car-only (SCO) stall of 7'6" by 15' and Classes 8 through 11 being large vehicles. Design vehicles for determining impact on parking dimensions are defined as the 85th percentile vehicle in the range from smallest to largest.

In hindsight, the growing use of light trucks, vans, and sport utility vehicles for personal transportation combined with the decline in small car sales, is undoubtedly one of the most significant changes in the parking industry in the 1990s. Now, as we head into the new millennium, the public has caught on to that fact, made evident by the media attention paid to this issue in the last year. Among others, *The Los Angeles Times*, *The New York Times*, *The Wall Street Journal*, and the NBC news magazine "Turning Point" have all run "exposés" on the problem of parking stalls being too small for the vehicles now tooling around our cities.

Traditionally, the Federal government and automakers have considered vans, utility vehicles, and trucks as light commercial vehicles, under the umbrella term of light trucks. The safety and environmental regulations applied to cars generally do not apply to these vehicles;

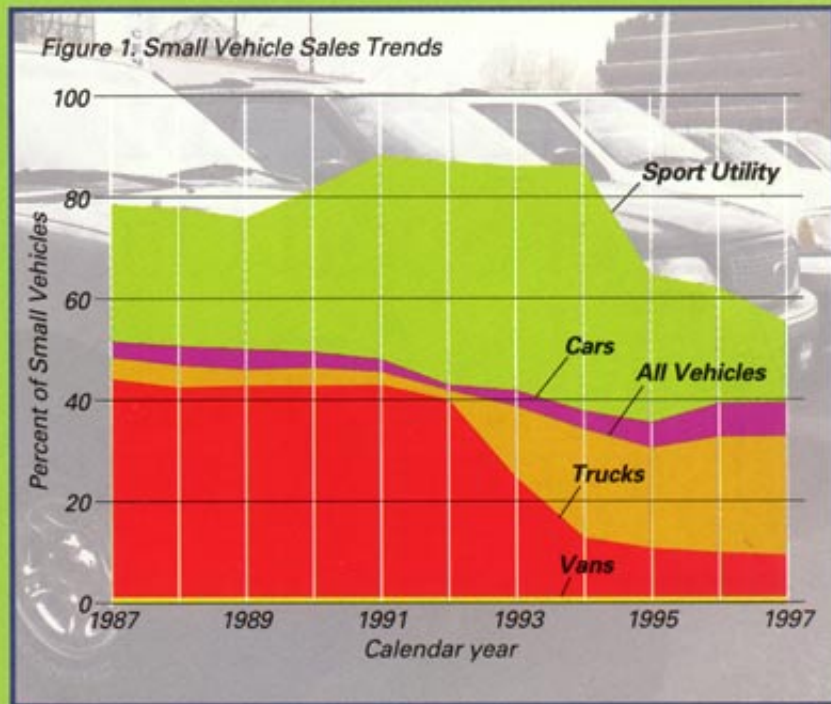
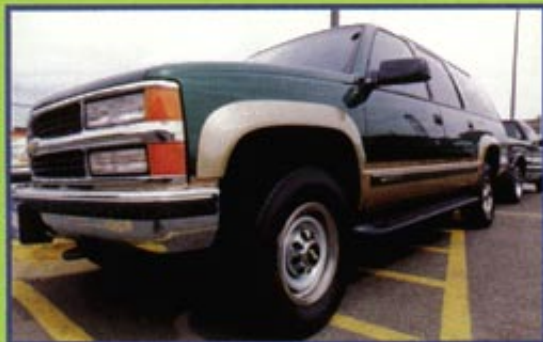


auto sales reports in the media likewise typically do not include vans and utility vehicles. The industry now uses the more accurate term "LTVU" (which stands for light trucks, vans, and utility vehicles) because vans and utility vehicles have become a significant portion of the sales in the "truck" category.

Before proceeding, let me make a personal confession. After several years of lobbying by assorted family members, I finally broke down and traded in my mini-van for a Ford Expedition. Little did I realize how portentous a choice it would be for a parking consultant. Read on to find out why.

1997 Vehicle Sales Report

Figure 1 presents the percent of passenger vehicles (including both cars and LTVUs) sold for calendar year 1997 which qualify as "small." The only significant shift in terms of small/large mix in vehicle sales is the drop in percent of small sport-utility vehicles from 62 percent in 1996 to 55 percent in 1997. This is attributable to the soaring sales of the new and larger "Utes"—Ford Expedition/Lincoln Navigator (Class 10), Lexus 450 (Class 9), Dodge Durango, Mercedes ML320, and Infiniti qx4 (all Class 8). The larger Utes single-handedly pulled down the percentage of small vehicles (including cars, light trucks, vans, and sport utility)



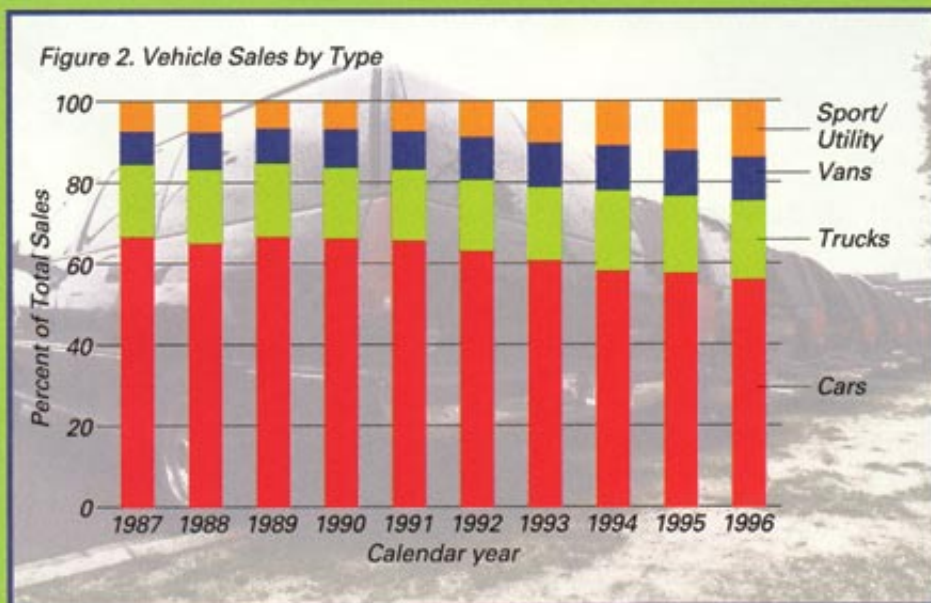
sold by 1 percent from 33 percent to 32 percent. Because most of these vehicles were new models that weren't even available for a full year, there almost certainly will be a little more decline next year. And Ford, at least, has enough confidence in the market for these vehicles to introduce an even larger one!

In 1997, the only significant growth area was sport utility vehicles. Utes climbed from 14 percent of vehicle sales in 1996 to 16 percent in 1997, dropping cars from 57 percent to 55 percent. The growth is even more startling over 5- and 10-year timeframes, with Utes comprising only 9 percent of the market in 1992 (see Figure 2).

The sales of small pick-up trucks continued its average 1 percent per year drop—10 percent in 1996 to 9 percent in 1997 after the big drop from 25 percent in 1993 to 14 percent in 1994. The percent of small cars sold remained at 39 percent after rebounding from the low of 35 percent in 1995. None of the vans on the market in the last 10 years qualify as small—so you could call that group quite stable at 0 percent.

Overall, LTVUs continued to climb as a percent of the overall market to 44.7 percent of the market—up from 36 percent in 1992 and 23 percent in 1982 (see Figure 3). There are indications that the rate of growth is slowing, but we certainly cannot predict where it might stabilize. Indeed, November 1998 was reportedly the first month

Figure 2. Vehicle Sales by Type



ever when there were more LTVUs sold than cars.

Design Vehicles

The trend to larger sport utility vehicles is indeed very significant in parking design in that the Ford Expedition at 6'7" by 17' also assumed the mantle of "design vehicle" for the sport-utility segment in 1997, adding three inches in width and a whopping 1'2" in length to the design vehicle from 1996 sales, the Toyota Land Cruiser (6'4" by 15'10"). While all other design vehicles remained the same, the increase in the Ute design vehicle increased the composite design vehicle two inches in length from 6'3" by 16'7" in 1996 to 6'3" by 16'9" in 1997.

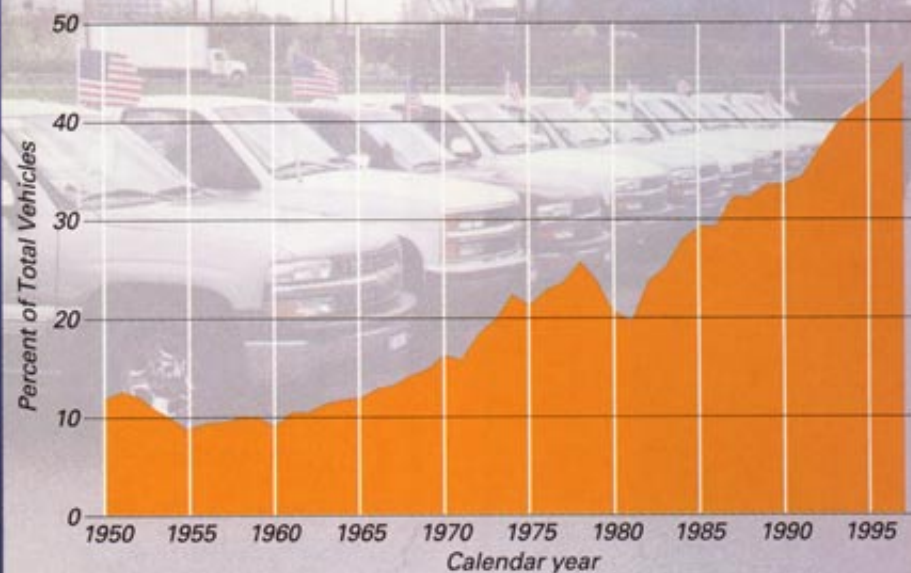
So, yes, I own the 85th percentile design vehicle for LTVUs—the Ford Expedition. And yes, I now daily test the ease of turning the thing into parking stalls from aisles of various (but all too often awfully tight) dimensions. At least I am not alone. More than 250,000 Expeditions and its sister vehicle, the Lincoln Navigator, were sold in 1997, the first year that it was available. At least now, since the recent announcement of the introduction of Ford's yet larger Excursion, I have the comfort of knowing that soon I will no longer be driving the largest Ford "truck" on the road!

Impact on Parking Geometrics

As reported last year, if your parking facility is designed with one-size-fits-all stalls that are 8'6" or wider, you are probably doing reasonably well. The overall design vehicle today is still smaller than the 6'4" by 17' design vehicle of 10 years ago. However, if you have a lot of small-car-only stalls, chances are you are feeling the heat. As noted previously, it would appear that the public backlash against those stalls is finally in full swing.

The problem with small-car-only stalls is that the only way to get rid of them is to give up parking stalls—and many of those who have

Figure 3. LTVU Market Share



small car stalls simply can't afford to do so. Unfortunately, even your friendly parking consultant can usually only minimize the loss of stalls with various layout tricks.

As noted in our last report (see "Car Sales Data," pg. 39, Oct/Nov 1997 issue of *PARKING* magazine) the City of Honolulu, which formerly had one of the most liberal small-car-only stall ordinances, went "cold turkey"—no more SCOs in new parking, period. While most localities cannot make you restripe to eliminate SCOs if they were legal when you put them in, it will be interesting to see just how much pressure is brought to bear on this issue. I'm sure other NPA members share my interest in hearing about any situations in which owners/operators feel compelled to eliminate SCO stalls. Please write or email the NPA office with your local experiences/problems and we will present them in a future issue. **P**



Mary Smith is vice president in the Indianapolis office of Walker Parking Consultants/Engineers, Inc. She has been monitoring trends in car sizes for the parking industry since 1983. The information presented here is the latest update on significant trends in the size of cars and light trucks, vans, and sport utility vehicles. For additional information, Mary Smith can be reached at 317/842-6890.

ANN ARBOR
(734) 663-1070

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