The size and shape of the UK parking profession

British Parking Association and Skyblue Research – April 2013

BPA
BRITISH PARKING ASSOCIATION

Introduction

As the largest professional association in Europe representing organisations involved in parking and traffic management, the British Parking Association (BPA) is frequently asked questions about the profession and its scope by media outlets and as part of government consultations

The BPA is therefore keen to be able to respond with greater clarity and with access to over 720 member organisations; our objective was to gather the information necessary to enable the creation of an overview of the parking profession, placing the BPA in an authoritative position to answer questions about it.

The BPA commissioned Skyblue in October 2011 to carry out a research project addressing a number of key questions in the UK's parking profession. These ranged from top-level estimates of turnover, workforce numbers and parking space numbers, to a more detailed understanding of the occupancy and turnover of parking spaces and collection rates for Penalty Charge Notices (PCNs). Many of these questions relate to a wider study being carried out by the European Parking Association (EPA)[1].

198 responses were received from a range of sources including local authorities, private sector parking management and enforcement companies, NHS trusts and universities with the following results emerging:

Parking Facilities	This research identified over 4,700 parking facilities across the UK, of which 48% are run by local authorities; this extrapolates upwards to an estimation of 17,000[2] facilities across the UK. Most parking facilities identified by this primary research (93%) are surface facilities. Of the multi-storey and underground facilities identified, more than 1 in 5 is over 40 years old.
Parking Spaces	This research has identified 1.2 million parking spaces across the UK, representing somewhere between 10% and 20% of the total parking in the UK. It is estimated that there are likely to be between 8 million and 11.3 million spaces in total.[3]

[1] *Parking Slots in Europe*, July 2011 – available from www.europeanparking.eu/Data-Collection

[2] It is worth noting that, at the time of the research being undertaken, there was a simultaneous study being researched into the scope of parking within the Healthcare and Higher Education sectors – due to this, many parking facilities related to Healthcare and Higher Education have not been included in these figures, to be considered when in comparison with the higher figure estimated by Parkopedia and Transport Direct (As referenced in *Spaced Out: Perspectives on Parking Policy*; Bates & Leibling, RAC Foundation, July 2012, p 13).

[3] This figure, however, is likely to under-represent the non-regulated parking which represents the majority of parking in the UK and for which few local authorities have information. It will also not include residential parking such as garages and driveways which *Spaced Out* estimates could include a further 17 million spaces

Disabled spaces	The research has identified that over 37,000 of the spaces named above are reserved for disabled motorists, representing between 12% and 18% of the UK's total disabled parking stock and suggesting between 200,000 and 300,000 regulated spaces.
Occupancy of parking spaces	Occupancy rates for car parking spaces appear to be lower among local authorities than other parking providers. Most local authorities operate between 50% and 80% occupancy whereas most other providers operate above 80%.
Parking tariffs	Across the country, most short-term parking (i.e. hourly) costs approximately £1 per hour. Whilst monthly parking permits are not commonly used, however, many private and public providers have annual permit schemes. Local authority permits for off-street parking tend to be more expensive than other providers' permits, but those provided for on-street use are significantly cheaper. Nearly half of all respondents charge for all of their off-street parking, while just under a sixth charge for none.
Employment	The profession employs approximately 82,000 people of whom the vast majority (72,000) are employed in the private sector[4]. This data, coupled with identifiable trends within the current research, suggests that potential growth within the profession will make a positive contribution to rebalancing the economy away from public sector towards private sector employment.
Qualifications	Data from the household survey demonstrates that the aggregate level of qualifications at trade apprentice and above is lower in the parking profession than in the overall population of working age. However, the BPA's workforce development survey suggests that the private parking sector has an almost equivalent proportion of its workforce qualified to level 3 and above as in the UK workforce overall. Demand for skills and qualifications will continue to be driven by technology and legislation but also by customer preference for parking and payment methods.
Turnover	Parking turnover within the local authority sector is estimated to be in the region of £1,500m per annum. Turnover figures from the private sector are not readily collated and are in any case not comprehensive for all non-local authority parking provision. The relative sizes of the public and private sectors suggest that private sector turnover will be higher than that of local authorities. Further research is needed to form a more authoritative overall turnover figure.

[4] BPA 2011 Workforce Survey Update; Pye Tait Consulting, p 5 – available from: www.britishparking.co.uk

Penalty Charge Notices	The collection rate for PCNs issued in England is 70%, with a lower rate in London than the rest of England; 64% in London and 72% in rest of England. Collection rates are lower for on-street parking in London compared to the rest of the UK, but higher for off-street parking. There would not appear to be data available to support a comparison for CCTV generated PCNs which also cover moving traffic offences, however, the BPA conducted a survey of its members and the analysis suggests that around 1.8 million parking charges are issued per year on private land of which 31% go unpaid, with a higher proportion of those issued via ANPR cameras unpaid compared to those issued via a ticket.
Drivers of parking demand	The primary driver of demand for car parking is the extent of car ownership and destination parking (most especially commuter parking, but also for shopping, leisure and related activities). In addition, travel (and parking) demand is affected by: demographics, economic activity, transport options, land use patterns, prices and, also, demand management strategies. In addition to the state of the economy, other main drivers of parking demand include commercial development, popularity and price of alternative transportation, the cost of parking, and changes in work practices such as flexible hours and home working.
Car parking and fuel prices	The volume of car parking, and revenue derived from car parking, would appear to be affected by a rise in fuel prices. Every 1% increase in the price of fuel reduced vehicle travel by 0.93% for lower income urban households, compared to 0.75% for middle income rural residents. The current research would suggest that discernible trends such as the increase in car sharing, car park clubs and, especially, park and ride facilities, will exacerbate any reduction in parking volumes and revenue driven by increasing fuel prices.
Foreign vehicles in the UK	At any one time there are 140,000 foreign registered vehicles in the UK and over 3 million foreign registered vehicles enter the UK each year.[5]

[5] A quantitative assessment of the extent of foreign vehicle activity in the UK Commissioned by the SPARKS Programme

Summary

While this research is useful and beneficial in helping us understand the size and shape of the UK parking profession, there are limitations and we recognise that further research is needed. The BPA is always keen to work with our members and other key stakeholders and research will continue to be a major focus as we strive to develop our membership and deliver better value and increased standards to the parking profession.

About Skyblue

Skyblue have been providing independent, professional market research and evaluation services for twenty years, and offer quantitative and qualitative research services, including economic, social, impact, cultural, customer and commercial research to name just a few of the specialist disciplines they offer. Their focus is on providing a research consultancy service with insight, practical advice and recommendations for actions that will work for your organisation and your customers in real life.

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