



2011 Workforce Survey Update

Final Report

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Executive Summary

Overview

The objectives of the 2011 Workforce Survey Update were to:

1. Determine an accurate and up-to-date profile of the UK parking sector and its workforce;
2. Establish the impact of the 2007 UK Parking Sector Skills Strategy (UK PSSS);
3. Provide recommendations for the future role and direction of the BPA in relation to the skills and professionalism agenda.

The research involved three core strands of activity which were carried out between March and May 2011:

- Survey of employers (200 unique employer respondents across a targeted range of turnover bands);
- Interviews with employees (24 telephone/3 face to face completions);
- Focus group as part of the BPA's own Learning and Development Network Forum (14 participants).

Workforce survey - headline findings

- The parking sector is estimated to consist of **927 organisations** (542 private sector organisations and 385 public sector organisations);
- The parking sector workforce is estimated to consist of **82,000 direct employees** (72,000 private sector workers and 10,000 public sector workers);
- The workforce is **larger than previously estimated** – this can be explained by improvements in sector intelligence, coupled with the robust methodology applied by the survey. The findings do not purport to show that the sector has grown in numbers since previous estimates were published;
- Each parking organisation employs an **average of 81.8 staff** (132.5 in the private sector and 25.6 in the public sector);
- Just over **two thirds of employees are male** and **85% work in full-time positions**;

- The workforce now appears to be **slightly better qualified** than reported by Asset Skills/BPA in the 2010 Sector Skills Assessment (SSA) for the parking sector, although currently below UK averages:
 - 39% hold their highest qualification at Level 2;
 - 5.6% hold no formal qualifications – a slight reduction 8% as reported in the SSA;
 - the parking sector is currently less highly qualified than the UK averages; 39.1% of the parking workforce hold their highest qualification at minimum Level 3, compared with a UK average of 51% across all sectors.

- The **three greatest challenges** facing parking sector employers are: external economic factors; customers demanding more from parking; Protection of Freedoms Bill (proposed ban on clamping on private land);

- Employers are generally in agreement that the issues facing the sector will result in the need for **more job-specific learning and development**.

Impact of the UK Parking Sector Skills Strategy (UK PSSS)

Employers were asked to rate on a scale of 1 to 10 (with 1 being ‘no improvement’ and 10 being ‘significant improvement’), the extent to which the parking sector has improved over the last five years according to eight specific contributory factors; these factors represent the BPA’s key areas of work within the remit of the UK PSSS and the results are presented below:

Factor	Overall Rating	Public Sector Rating	Private Sector Rating
Public perceptions of the parking sector	4.6	4.7	4.4
Workforce demand for L&D	5.1	5.3	4.9
Opportunities for L&D	5.3	5.6	5.1
Quals and learning relevant/fit for purpose	5.0	5.6	4.4
Consistency in standards and competence	5.4	5.6	5.3
Opportunities for career progression	4.2	3.9	4.5
Overall job satisfaction	5.9	6.0	5.8
Overall professionalism of the sector	6.7	7.0	6.3

Average improvement rating by employers where 1 = no improvement and 10 = significant improvement

Range of ratings given: 1 to 10

Base: 167-188 respondents (not all respondents rated each factor)

It is clear that some progress has been made across all areas of work although there is still room for improvement. The BPA appears to have made **most progress in relation to ‘overall professionalism of the sector’**, with the most challenging area being ‘opportunities for career progression’.

Skills considered to be most lacking within the existing workforce include written and verbal communication; knowledge of the parking sector (including legislation); as well as management and leadership.

Significant barriers to employer participation in learning and development include cost; time to train; and relevance of learning to business needs.

Impact of the Institute of Parking Professionals (UK PSSS)

Approximately **one third of employers currently ‘recognise’ the IPP** by paying for or encouraging membership among the workforce – presently one fifth of employers pay for membership on behalf of their workforce on an on-going basis.

Employers who currently recognise’ the IPP were asked to rate the extent to which each of the IPP’s core services is valued. The average rating in respect of each factor is summarised below where 1 = ‘not at all valuable’ and 10 = ‘extremely valuable’.

Factor	Overall Rating	Public Sector Rating	Private Sector Rating
Acquiring Member or Fellow Status	5.8	5.4	6.2
Recognition of quals and experience	7.0	7.1	6.9
Networking opportunities	6.5	7.0	5.8
CPD – including support and advice	6.7	7.0	6.2
Updates on sector news/legislation	7.3	7.7	6.9
Careers information	5.9	6.3	5.4
Access to member-only section of website	5.9	6.0	5.8
Overall professionalism of the sector	7.4	7.5	7.3

Value rating by employers where 1 = not at all valuable and 10 = extremely valuable

Base: 68 respondents (that recognise the IPP)

There is considerable **positivity in respect of most services**, with ‘updates on sector news/legislation’ of particular value, as well as the IPP’s contribution to the overall professionalism of the parking sector.

Headline conclusions and recommendations

Key successes in the parking sector over the last five years:

- ✓ An improvement in skills and professionalism;
- ✓ A better qualified and more diverse workforce;
- ✓ The Institute of Parking Professionals is generally well regarded.

Headline conclusions:

- ❖ The parking sector workforce is larger than previously estimated;
- ❖ A case exists to raise the profile of the BPA and its services;
- ❖ Inconsistencies exist between local authority parking services;
- ❖ The parking sector is less highly qualified than the UK average/there is evidence of insufficient awareness of the range of parking-related qualifications;
- ❖ Professional development is largely reactive to change (such as legislation);
- ❖ Employees do not generally recognise parking sector career opportunities;
- ❖ Technological change is going to continue to drive change in the sector;
- ❖ A case exists to raise the profile of the Institute of Parking Professionals.

Headline recommendations:

Recommendation 1:

Enhance the marketing and communications strategy to further raise the profile of the parking sector and the services offered by the BPA.

Recommendation 2:

Improve employer/employee awareness of the range and benefits of parking qualifications.

Recommendation 3:

Improve employer commitment to skills enhancement as well as Continuing Professional Development (CPD).

Recommendation 4:

Improve information available to employees on parking sector careers.

Recommendation 5:

Support employers to adapt to on-going technological change facing the parking sector.

Recommendation 6:

Further develop and promote the benefits of IPP member services both to existing as well as current non-members.

1. Introduction

1.1 Research background

There are currently over 31 million cars on UK roads. Slightly more than one car for every two members of the population.

Even though the total declined in 2010 - for the first time since World War Two - it still represents a major challenge for those supplying parking places for citizens on the move. In spite of the Government's successful car-scrappage scheme and the increased use of public transport in recent years, all the evidence points not to a significant reduction in the numbers of cars but to a subtle shift towards smaller, more efficient and greener vehicles.

Parking activities will, therefore, remain an extremely important function of local government and private sector organisations and will continue to have a significant impact on everyday life in towns and cities across the UK.

The British Parking Association (BPA) is the largest professional association in Europe representing organisations in the parking and traffic management sector¹. Its growing membership consists of over 700 organisations including local authorities², manufacturers and suppliers, car park operators, debt recovery services (parking), as well as specialist learning providers and consultants. The vast majority of these organisations are responsible for enforcement on either public land, private land or both.

One important aim of the BPA is to increase the profile and professionalism of the sector. In 2006 the BPA commissioned the first Workforce Survey across the parking sector and this became the starting point for the development of the UK Parking Sector Skills Strategy (UK PSSS), published in 2007. The UK PSSS was designed to improve the skills, knowledge, qualifications and professionalism of the sector's workforce and to create a learning culture. The UK PSSS informed the BPA's five-year strategy document covering the period 2007-2012.

¹ The BPA's membership consists primarily of UK organisations and includes a small number of overseas businesses and affiliates.

² In Northern Ireland parking is managed by the Department for Regional Development.

Since the publication of the UK PSSS, the BPA has gone on to:

- elect an active Skills and IPP³ Board (SKIPP);
- establish a strong relationship with Asset Skills⁴;
- produce functional and occupational maps with requisite national occupational standards;
- develop a qualifications framework for the benefit of individuals working in the sector;
- establish the Institute of Parking Professionals (IPP) to represent and assist individuals working in the sector.

During 2011, many aims of the UK PSSS will have been completed. The BPA decided, therefore, that it would be appropriate and valuable to assess the impacts of the strategy to date, in order to inform the next phase of the skills and professionalism agenda and the BPA's next five-year strategy. To achieve this it is necessary to have an up to date and reliable profile of the parking workforce in the UK, as well as feedback from the sector on the impact of the UK PSSS over the last five years.

The 2011 Workforce Survey Update was commissioned from Pye Tait Consulting to address this need, the findings of which are presented within this report.

1.2 Changes affecting the parking sector

A number of changes have impacted upon the parking sector over the last five years and will continue to drive the skills needed by the workforce in the months and years to come. In the 2010 Sector Skills Assessment⁵ for the parking sector – Asset Skills and the BPA outlined the most significant drivers as summarised below:

- **Shape of the economy**
The impact of the recent recession and cuts to the public purse combine to highlight the importance of leadership skills, customer relationship management, financial and strategic planning as well as innovation;
- **Sustainability and regeneration**
The drive towards social, environmental and economic sustainability will make the planning and management of sustainable resources more important;

³ SKIPP was formed from combining the Skills Board and the Institute of Parking Professionals (IPP) Board in October 2009 in order to combine two closely linked work-streams within the BPA

⁴ The Sector Skills Council (SSC) for facilities management, housing, property, planning, cleaning and parking

⁵ The SSA was developed by Asset Skills and the BPA to contribute meaningful labour market and skills information for the Parking Sector – one of the key sectors as part of Asset Skills' footprint.

➤ **Legislation and regulation – in particular:**

Traffic Management Act 2004 (came into force 31st March 2008) – Additional powers to local authorities to manage the movement of traffic, better manage parking policies and scope to take over the enforcement of driving and parking offences from the police; guidance has been issued on the operation of Civil Parking Enforcement (CPE) including standards required for learning, professionalism and compliance;

Protection of Freedoms Bill (awaiting parliamentary approval/excluding Northern Ireland) – Proposed ban of clamping, immobilisation and towing of vehicles on private land;

Approved Contractor (Operator) Schemes – Operational and performance standards for suppliers of private security services; the BPA has set up an Approved Operator Scheme (AOS) and any organisation involved in off-street parking enforcement and wishing to join the BPA must also join the AOS;

➤ **Growing sophistication of consumers and increasingly demanding customers**

Competitive tendering processes mean that private contractors are under increasing pressure to succeed in meeting contractual requirements of local authorities; active media interest in the parking sector has led to consumers asking more questions and becoming more aware of their rights and responsibilities; these factors combine to place ever-increasing importance on customer service and communication skills, as well as tendering and contract management skills;

➤ **Increasing use of technology**

Increasing use of hand-held devices for recording and communications, cashless parking schemes, as well as electronic payment processing and real-time incident reporting, will drive the need for specialist skills to develop, install and maintain these services; however advances in technology are expected to pre-empt a marked reduction in demand for Civil Enforcement Officers (and equivalent roles).

1.3 Defining the parking sector

As was the case in 2006 when the first workforce survey was carried out - the parking sector is not clearly represented by the UK Standard Industrial Classification (SIC) system. This means that datasets produced using this system, such as those made available by the Office for National Statistics (ONS) do not provide meaningful metrics on the size and shape of the parking sector.

The diverse nature of parking activities, particularly in both public and private sector operating environments, means that parking activities are embedded within several SIC codes amongst other activities completely unrelated to parking, notably operation of rail, freight and bus facilities. As a result, the datasets produced using these codes are not wholly relevant to parking.

Updates to the SIC system

Previous research into the size and shape of the parking sector referred to SIC (2003) code 63.21 – ‘Other supported land transport activities’ as the most appropriate code for capturing parking activities.

The SIC system was updated in 2007 although this did not feed immediately into national datasets. The most appropriate code is now SIC (2007) 52.21 ‘Service activities incidental to land transportation’. It should be noted that both of the 2003 and the 2007 codes exclude local authority activities which are classified elsewhere, again without explicit reference to parking.

The activities classified within SIC code 52.21 are:

52.21 Service activities incidental to land transportation

- 52.21/1 Operation of rail freight terminals;***
- 52.21/2 Operation of rail passenger facilities at railway stations;***
- 52.21/3 Operation of bus and coach passenger facilities at bus and coach stations;***
- 52.21/9 Other service activities incidental to land transportation, n.e.c.⁶ (not including operation of rail freight terminals, passenger facilities at railway stations or passenger facilities at bus and coach stations).***

This subclass includes:

- operation of roads, bridges, tunnels, car parks or garages, bicycle parks, winter storage of caravans;
- towing and road side assistance;
- switching and shunting;
- other activities related to land transport of passengers, animals or freight.

Source: SIC 2007

While the challenge of producing reliable data for the parking sector cannot be immediately overcome due to deficiencies within the SIC system, the methodology employed by the 2011 Workforce Survey Update aims to provide the most comprehensive picture to date as explained in the sections that follow.

⁶ NEC = Not elsewhere classified

2. Research Objectives

2.1 Research Objectives

The objectives of the 2011 Workforce Survey Update were to:

1. Determine an accurate and up-to-date profile of the UK parking sector and its workforce;
2. Establish the impact of the 2007 UK Parking Sector Skills Strategy (UK PSSS);
3. Provide recommendations for the future role and direction of the BPA in relation to the skills and professionalism agenda.

The evidence is required to help the BPA to understand:

- How the size and shape of the sector has changed within the last five years;
- The impact of legislative, economic, technological and other drivers of change;
- How public and media perceptions of the parking sector have changed;
- Knowledge, skills and qualifications levels among the workforce;
- Suitability of current learning and development provision, including recognised qualifications;
- Career aspirations and progression opportunities for individuals;
- What the BPA could consider doing to meet the needs of the parking sector over the next five years.

3. Methodology

In order to meet the project objectives, the research involved three core strands of activity which were carried out between March and May 2011:

- Survey of employers (200 respondents) - around 30% of member organisations;
- Interviews with employees (24 telephone/3 face to face completions);
- Focus group as part of the BPA's own Learning and Development Network Forum (14 participants).

3.1 Survey of employers

3.1.1 Survey strengths

The survey of employers was constructed to provide the most accurate and reliable profile of the parking sector to date, including the size and characteristics of the workforce. The main differences between this, and the 2006 survey, are as follows:

- ✓ Targeting 'organisational' rather than 'individual' responses; i.e. obtaining data in respect of the entire parking-related workforce of each organisation rather than merely the individual respondent;
- ✓ Targeting one response per organisation, thereby ensuring a larger number of distinct organisations consulted (200 unique organisations surveyed as opposed to 164 in 2006);
- ✓ Targeting respondents with appropriate seniority and experience to collate data on behalf of the entire parking-related workforce of their organisation, as well as respond on behalf of their organisation;
- ✓ Targeting a specific number of **public and private sector organisations** as well as **organisations of different sizes (in terms of parking turnover)**; the survey targets were based on the types and sizes of organisations within the BPA member list;
- ✓ Targeting a mix of employers across the **four nations of the UK** and ensuring responses from England, Scotland, Wales and Northern Ireland;

- ✓ Telephone-based approach so that completions could be actively managed in line with targets and the sample frame;
- ✓ Offering a two-stage approach (via repeat telephone call or an option to provide information to the researchers via email) where respondents stated they were unable to provide requested information immediately.

3.1.2 Sample frame

The survey set out to achieve responses from 175 employers (however, 200 completions were obtained). The sample frame was governed by two principal variables:

- Parking-related turnover;
- Public/private sector⁷.

In addition to these two principal variables, the survey also sought to ensure representation from employers across the four UK nations.

Due to significant deficiencies in the UK Standard Industrial Classification (SIC) system for defining the parking sector (see section 1.2) it would not have been possible to rely solely on business population data produced by ONS, and linked to SIC, to inform the sample frame.

Instead, the BPA's membership database was used as a more reliable proxy for the sector, and hence, the sample frame. This database represents two thirds (66.02%) of the parking sector, consisting of 612 public and private sector organisations out of an estimated 927 public and private sector organisations involved in parking in the UK as a whole.

NB: The 2011 workforce estimate is explained in more detail in section 4.2.

The sample frame used for the survey is set out below:

⁷ Consideration was given to setting the sample frame by employee size band (total employees) but this information was not available from the database of employer contacts supplied by the BPA and considered to provide the most appropriate cross-section of parking-related activities.

Table 1 - Breakdown of BPA member organisations

(#Total exceeds 100% due to rounding)

Turnover (£K)	Count	%
Private sector organisations:		
0-69	16	3%
70-249	159	26%
250-999	71	12%
1,000-4,999	61	10%
5,000-19,999	27	4%
20,000+	10	2%
Subtotal	344	57%
Public sector organisations:		
0-1,999	120	20%
2,000-6,999	111	18%
7,000-19,999	29	5%
20,000+	8	1%
Subtotal	268	44%
Total	612	100%#

Table 2 - Survey sample frame

Turnover (£K)	Target interviews	%	Achieved interviews*	%
Private sector organisations:				
0-69	5	3%	20	10%
70-249	45	26%	27	13%
250-999	20	12%	22	11%
1,000-4,999	17	10%	18	9%
5,000-19,999	8	4%	8	4%
20,000+	3	2%	8	4%
Unknown	-	-	1	1%
Subtotal	98	56%	104	52%
Public sector organisations:				
0-2,000	34	20%	39	19%
2,000-6,999	32	18%	42	21%
7,000-19,999	8	5%	11	5%
20,000+	2	1%	3	2%
Unknown	-	-	1	1%
Subtotal	76	44%	96	48%
Total	175	100	200	100%

3.1.3 Acquiring contacts and questionnaire development

Contacts for the survey were acquired from the BPA's membership database of 612 organisations (made up of 344 private organisations and 268 local authorities). An additional list of 437 non-member organisations was also supplied by the BPA and used to supplement the achievement of each element of the sample frame where required. The BPA's own contacts were used for the survey as they were considered to provide the most appropriate cross-section of parking-related activities rather than the purchase of independently sourced commercial contacts (which would have depended upon SIC codes).

The questionnaire developed for the 2006 survey was used as a basis for the 2011 survey update - this was to ensure that comparisons could be made to identify progress in key areas of interest for the BPA. The 2011 questionnaire incorporated a number of new elements designed to assess the impact of the 2007 UK Parking Sector Skills Strategy (UK PSSS) and included a mix of both quantitative and qualitative questions to gather statistical as well as attitudinal information.

3.2 Telephone interviews with employees

During the survey, employers were asked to nominate one or more employees to contribute to an onward telephone interview. The purpose of these employee interviews was to expand on the employer perspective and explore the individual views of employees in respect of the following key areas:

- The nature of their job role; what aspects they prefer and find less pleasing; changes that have impacted on their job role over the last five years;
- Learning and development, including perceived accessibility and suitability of qualifications relating to parking;
- Career opportunities within parking.

A total of 24 telephone interviews were completed and three face to face interviews at the Parkex Exhibition in Birmingham on 30th March 2011.

The employee interviews captured the views of employees operating in a wide variety of parking-related occupations, as set out below:

Table 3 - Employee interviews - occupations held

Account Manager	CEO x 3	Senior CEO
Administration Assistant	CEO Supervisor x 3	Senior Technical Administrator
Administration Supervisor	Notice Processor	Supporting Contract Manager
Deputy Team Manager	Notice Processing Supervisor	Technical and Monitoring Officer
Business Development Manager	Prosecutions Office Supervisor	Training Consultant
Court Appointed Bailiff	Revenue Protection Officer	Training Officer
Customer Services Officer	Sales Executive	
	Senior Appeals Officer	

3.3 Focus Group – Learning & Development Network Forum

Pye Tait Consulting facilitated a focus group as part of the BPA’s Learning & Development Network Forum, held at the Institution of Highways and Transportation on 10th May 2011. The focus group was attended by 14 participants, as well as observers from the BPA, Asset Skills and City & Guilds. Participants included representatives from local authorities, private sector employers as well as learning providers and learning consultants.

The focus group provided the opportunity to present an overview of the research, headline findings from the employer survey and employee interviews, as well as explore the following key themes as part of in-depth discussion:

- What it’s like to work in the parking sector, including challenges, drivers of change and their impact on skills needs over the last five years;
- Demand for learning and development and the accessibility/suitability of learning and development, including recognised qualifications, relating to parking;
- How standards of professionalism in the parking sector have changed over the last five years;
- The role and value placed on the Institute of Parking Professionals (IPP);
- Key messages that the BPA needs to take forward as part of the next five-year strategy.

4. Workforce Profile

This section compares previous estimates of the size of the parking sector workforce with the new 2011 workforce estimate determined as a result of this research.

4.1 Previous workforce estimates

In recent years, the BPA has sought to achieve the closest possible estimate for the size of the parking sector workforce and these previous estimates are outlined below. **It should be noted that variations in workforce estimates in recent years have resulted from new developments in sector intelligence and do not purport to show the sector has changed in size.**

2006

As a result of the first Parking Workforce Survey carried out in 2006, the size of the workforce was estimated to consist of approximately 60,341 individuals⁸, although a breakdown of the estimated public/private sector totals was not provided. The task of estimating the size of the sector was made particularly difficult by there being no appropriate Standard Industrial Classification (SIC) code for parking and no way (for similar reasons) of using the Standard Occupational Classification (SOC).

2008

In 2008 the BPA published the Skills Needs Assessment for the parking sector. This report contained an alternative estimate of the size of the sector at 68,089 individuals⁹, based on Annual Business Inquiry data relating to SIC 2003 code 63.21 – Other supporting land transport activities. This SIC code does not provide coverage of the public sector, therefore the report also estimated 7,450 individuals working within local government¹⁰. The latter was calculated using revenue outturn data supplied by three local authorities.

2010

In 2010, the BPA and Asset Skills published a Sector Skills Assessment for the parking sector. This report sought to provide a closer estimate of the size of the sector by calculating that only 40% of businesses within the most appropriate SIC code were, in fact, relevant to parking. The revised estimate was that the UK parking workforce consisted of approximately 28,100 individuals, although this may be considered a misleading estimate since it is based solely on national data that does not relate specifically to the parking sector.

⁸ Turquoise Thinking Ltd. (2006) Parking Workforce Survey

⁹ Based on Annual Business Inquiry data in respect of SIC 2003 code 63.21 – Other supporting land transport activities

¹⁰ Asset Skills/BPA (2008) Skills Needs Assessment for the Parking Sector (p.53).

4.2 Workforce estimate 2011

4.2.1 Average staff per organisation

Table 4 shows the average number of directly employed parking staff per organisation and compares the 2011 and 2006 figures.

Based on the latest understanding of the parking sector, and using the robust methodology applied for the survey (section 3.1), the public and private sector direct staff figures are now reported as lower than in 2006. Despite these differences, the calculation of the overall average remains the same at just over 80 staff. This is due to differences in the weighting of public and private sector survey respondents in 2011 compared with 2006. The latest research is based on a more 'balanced' survey across the public and private sectors which represents the current mix within the BPA's membership. In 2006 a much higher proportion of survey respondents (three quarters) originated from the public sector¹¹.

Table 4 - Average no. parking staff per organisation¹²

Sector	2011 survey – direct staff	2006 comparison – direct staff
All	81.8	80.6
Public sector	25.6	39.9
Private sector	132.5	213.3

Base: 194 respondents

In order to provide an up-to-date estimate for the UK parking sector workforce, a separate calculation is required for both the private and public sectors.

¹¹ Note that in the case of the private sector, the average staff figure of 132.5 is skewed by a small (but otherwise valid) proportion of some of the largest UK parking employers that contributed to the research, including four employers each with over 1,000 staff. With those four employers excluded – the average no. staff per private sector organisation is 40.5 individuals.

¹² This table uses figures for directly employed staff (rather than including subcontracted staff) as this prevents double-counting where subcontractors may have also responded to the survey.

4.2.2 Private sector workforce estimate

There are estimated to be 1,355 organisations in the UK within SIC code 52.21 – ‘activities incidental to land transportation’¹³.

By applying the ‘40% calculation’ (used in the 2010 Sector Skills Assessment) to the ONS figure of 1,355, an estimate of 542 private sector parking organisations in the UK can be calculated.

A basis for the private sector workforce may therefore be calculated as 542 (parking organisations) x 133 (average private sector staff per organisation) = **72,086 private sector parking employees**.

4.2.3 Public sector workforce estimate

At the time of writing there are 384 local authorities in Great Britain (England, Wales and Scotland) responsible for parking-related activities. Taking into account the Northern Ireland Department for Regional Development, the figure becomes 385 public sector authorities responsible for parking in the UK.

Based on the 2011 survey results from 96 local authorities there is an average of 26 directly employed parking-related staff per local authority parking department¹⁴ giving a public sector workforce of 385 (local authorities) x 26 (average public sector staff per organisation) = **10,010 local authority parking employees**.

4.2.4 Total workforce estimate

Based on the above calculations, the total parking sector workforce may be calculated as:

72,086 private sector employees + 10,010 public sector employees =

82,096 total parking employees.

The latest parking workforce estimate is noticeably larger than previously thought. As indicated above, this can be explained by improvements in sector intelligence, coupled with the robust methodology applied by the survey. The findings do not purport to show that the sector has grown in number since previous estimates were published.

¹³ ONS UK Business Activity, Size and Location Guide 2010 (table B3.4)

¹⁴ This compares with an estimated 40 parking-related employees per public sector organisation as determined by the 2006 workforce survey.

4.2.5 Workforce comparison (2011 and 2008)

The table below draws a comparison between the latest workforce estimate and the 2008 estimate taken from the BPA Skills Needs Assessment (both studies incorporated private and public sector totals). Despite the latest workforce total being found to be higher – the split of the public and private sector workforce in percentage terms is almost the same in 2011 as 2008.

	2011 vol.	2011 %	2008 vol.	2008%
Total workforce	82,096		75,450	
Private sector	72,086	87.8%	68,089	90.2%
Public sector	10,010	12.2%	7,450	9.8%

5. Main Survey Findings

A total of 200 employers participated in the survey: 96 from the public sector and 104 from the private sector.

Based on the workforce estimates presented in section 4.2:

- 96 public sector respondents represents 25% of the 385 public sector organisations responsible for parking in the UK;
- 104 private sector respondents represents 19% of the 542 private sector organisations estimated to be responsible for parking in the UK.

Where appropriate and meaningful, the results are cross-tabulated by organisation 'category' (i.e. public/private sector). An additional set of tables and charts are provided in Appendix 1 that cross-tabulate the results by type of land enforcement (i.e. public land; private land; both; neither) carried out by the employer.

Throughout this section, cells within tables that offer significant data are shaded grey – typically the highest response value for 'all', 'public sector' and 'private sector' respectively.

A note on comparisons:

- Direct comparisons between the findings from this research and the first workforce survey carried out in 2006 are included wherever possible;
- Additional comparisons against national published data are included in respect of workforce characteristics and highest level of qualification level held.

5.1 Composition of survey respondents

The section presents data on the composition of respondents to the 2011 parking sector workforce survey according to a number of variables, including:

- Size of area covered (public sector organisations only);
- Region/s in which respondent organisations operate;
- Turnover (£) from parking related activities in the last 12 months.

Figure 1 - Population of area covered [public sector organisations only]

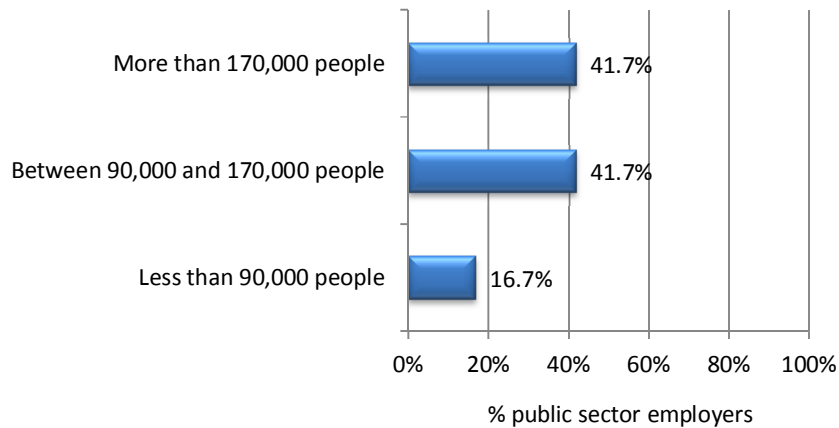


Table 5 illustrates the composition of survey respondents based on which region (or regions) they operate from in the UK. The table shows the breadth of coverage across the nine regions of England as well as Scotland, Wales and Northern Ireland.

Table 5 - Region/s in which respondent organisations operate

Region	All	Public sector	Private sector
Base respondents	200	96	104
London	64	8	56
East of England	54	10	44
North East	47	8	39
North West	50	8	42
South East	81	23	58
South West	55	10	45
East Midlands	47	5	42
West Midlands	55	11	44
Yorkshire and the Humber	49	9	40
Scotland	38	7	31
Wales	45	9	36
Northern Ireland	27	-	27
Europe (beyond UK)	10	-	10

Includes all regions out of which each employer operates

The composition of survey respondents based on each organisation's turnover from parking-related activities within the last 12 months can be seen in Table 6.

Table 6 - Turnover (£) from parking-related activities within last 12 months

Turnover (£)	All	Public sector	Private sector
Base respondents	200	96	104
Less than £70,000	23	3	20
£70,000 to £249,000	31	4	27
£250,000 to £999,999	33	11	22
£1,000,000 to £1,999,999	35	21	14
£2,000,000 to £4,999,999	35	31	4
£5,000,000 to £6,999,999	13	11	2
£7,000,000 to £19,999,999	17	11	6
More than £20,000,000	11	3	8
No comment	2	1	1

5.2 Types of parking activities undertaken

Respondents were asked to indicate what types of parking activities they undertake including:

- Type of land enforcement;
- Mix of parking activities undertaken;
- Principal parking activity undertaken.

Table 7 shows the type of land enforcement operated by respondents. Almost all local authorities responding to the survey participate in some form of enforcement activity, with a fifth operating on private as well as public land. In the private sector by way of contrast - 40% of employers are not involved in any enforcement activities at all. This highlights the significance of 'non-enforcement' activities undertaken by private employers involved with parking.

Table 7 - Type of land enforcement

Type of enforcement	All	Public sector	Private sector
Enforcement on public land/ highways only	37.7%	70.8%	6.7%
Enforcement on private land only	24.1%	2.0%	44.7%
Both	16.1%	21.9%	10.7%
No involvement in enforcement	22.1%	5.3%	37.9%

Base: 199 respondents

While two thirds of local authorities define 'parking enforcement' as their principal activity – a wider range of activities are considered key to the business in the private sector, notably the manufacture and supply of parking equipment and systems (Table 8).

Table 8 - Principal parking activity undertaken

Principal parking activity undertaken	All	Public sector	Private sector
Design and build of parking facilities	2.5%	-	4.9%
Manufacture and supply of parking equipment & systems	8.1%	-	15.5%
Engineering and maintenance	3.0%	3.2%	2.9%
Managing and operating parking facilities (incl. call centres)	22.2%	24.2%	20.4%
Parking enforcement (issuing notices/vehicle immobilisation/removal)	48.5%	65.3%	33.0%
Parking support services (handling enquiries/progressing cases/processing payments)	3.5%	3.2%	3.9%
Debt recovery services (parking notices)	3.5%	1.1%	5.8%
Fraud investigation	0.0%	-	-
Consultancy services (specialist parking advice)	3.0%	-	5.8%
Recruitment services (parking personnel)	1.0%	-	1.9%
Learning and development provision	0.5%	1.1%	-
Other	4.0%	2.1%	5.8%

% respondents

Base: 199 respondents

Table 9 shows the overall range (or 'mix') of parking activities undertaken by employers, without accounting for the weight or importance of any one type of activity over another. The relatively low contribution of parking enforcement within this table highlights the broad range of other activities undertaken and, consequently, the broad range of skills and knowledge likely to be required.

Table 9 - Mix of parking activities undertaken

Mix of parking activities	All	Public sector	Private sector
Design and build of parking facilities	8.1%	8.7%	6.9%
Manufacture and supply of parking equipment & systems	2.9%	0.2%	8.4%
Engineering and maintenance	11.2%	12.8%	8.0%
Managing and operating parking facilities (incl. call centres)	15.9%	15.9%	16.0%
Parking enforcement (issuing notices/vehicle immobilisation/removal)	17.0%	15.9%	19.3%
Parking support services (handling enquiries/progressing cases/processing payments)	14.9%	15.7%	13.1%
Debt recovery services (parking notices)	7.7%	7.6%	8.0%
Fraud investigation	2.8%	3.4%	1.5%
Consultancy services (specialist parking advice)	4.5%	2.0%	9.5%
Recruitment services (parking personnel)	6.4%	8.7%	1.8%
Learning and development provision	7.2%	8.5%	4.7%
Other	1.3%	0.5%	2.9%

% total responses

Base: 828 responses from 199 respondents

5.3 Workforce characteristics

Where the characteristics of the parking sector workforce are concerned we asked a number of questions including:

- Average no. total staff (direct and subcontracted) employed in different parking-related occupations;
- Variation in total staff within the last 12 months;
- Perceptions on staff turnover within the last 12 months;
- Gender/full-time or part-time/age bands/ethnic groups;
- Average no. migrant workers employed in parking-related occupations;
- Highest qualification levels held.

The estimated number of total staff (direct and subcontracted) employed in different parking-related occupations is presented in both Table 10 (average per organisation) and Table 11 (total UK).

The job role of PA/TA/CEO* is most common and there are approximately 8 employees in this role to every one PA/TA/CEO Supervisor. With an average of only 2.5 supervisors per local authority compared with 8 in the private sector – the opportunities for progression may appear more limited in the public sector.

Table 10 - Average no. total staff by occupation (per organisation)

Occupation	All	Public sector	Private sector
Strategic Managers/Directors	1.0	0.6	1.4
Parking Managers	1.0	1.0	1.0
Contract Managers	1.1	0.1	1.9
Notice Processing/Debt Recovery Managers	0.5	0.4	0.7
Car Park Managers	0.2	0.4	0.1
General business managers (inc. HR/Sales/Finance/Marketing)	1.8	0.5	2.9
All other managerial roles	1.3	0.4	2.1
Contract Compliance Officers	0.1	0.2	0.0
Notice Processing Officers	5.2	3.3	6.9
PA/TA/CEO Supervisors*	5.5	2.5	8.2
All other supervisory roles	0.8	0.6	1.0
PA/TA/CEOs*	41.7	15.4	65.6
Vehicle Immobilisation and removal Officers	2.4	0.9	3.8
CCTV Enforcement Officers	1.0	0.4	1.5
All other customer facing roles	3.3	0.4	5.9
All other administrative roles	4.5	3.6	5.4
Other technical	1.9	0.5	3.2
Other	3.5	0.3	6.4

*Parking Attendant (Scotland)/Traffic Attendant (NI)/Civil Enforcement Officer (England & Wales)

Base: 193 respondents

Appendix 2 lists those occupations classified by survey respondents as either 'Other technical' or 'Other'.

Table 11 - Average no. total staff by occupation (UK totals)

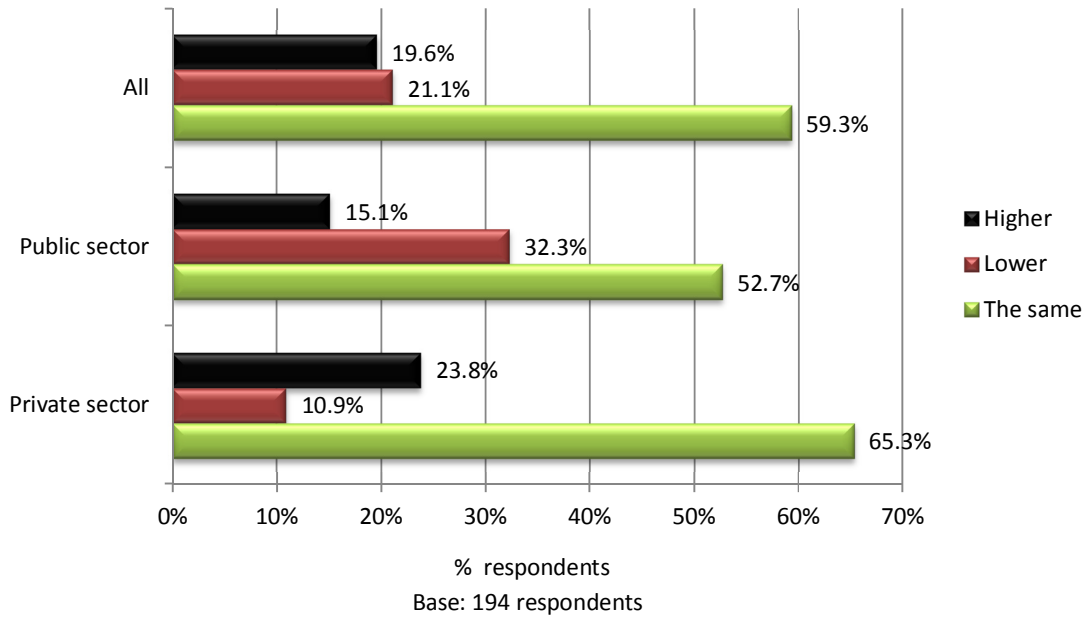
Occupation	All	Public sector	Private sector
Strategic Managers/Directors	954.8	223.3	780.5
Parking Managers	899.2	385.0	514.9
Contract Managers	1001.2	53.9	1046.1
Notice Processing/Debt Recovery Managers	491.3	146.3	363.1
Car Park Managers	222.5	142.5	70.5
General business managers (inc. HR/Sales/Finance/Marketing)	1631.5	181.0	1593.5
All other managerial roles	1177.3	150.2	1121.9
Contract Compliance Officers	92.7	69.3	16.3
Notice Processing Officers	4792.6	1266.7	3723.5
PA/TA/CEO Supervisors*	5080.0	970.2	4428.1
All other supervisory roles	741.6	211.8	558.3
PA/TA/CEOs*	38646.6	5936.7	35566.0
Vehicle Immobilisation and removal Officers	2224.8	338.8	2048.8
CCTV Enforcement Officers	889.9	161.7	791.3
All other customer facing roles	3031.3	142.5	3203.2
All other administrative roles	4180.8	1382.2	2899.7
Other technical	1752.0	184.8	1718.1
Other	3235.2	100.1	3485.1

*Parking Attendant (Scotland)/Traffic Attendant (NI)/Civil Enforcement Officer (England & Wales)

Base: 193 respondents

While the majority of employers across both the private and public sectors have not seen a change in the numbers of parking staff in the past 12 months – the public sector has instigated more cuts. Just under a third of local authorities report a cut in the numbers of parking staff within the last 12 months, as opposed to just 11% in the private sector (Figure 2).

Figure 2 - Variation in total staff within last 12 months



There is less movement both into and out of parking-related roles within local authorities than in the private sector. This is likely to be caused, in part, by a freeze on external recruitment instigated through the public sector spending cuts (Table 12).

In addition, and taking into account the fact that a broader range of 'principal activities' are prevalent in the private sector, including design, manufacture and consultancy (see Table 8), the data suggest a greater degree of fluidity and transfer of skills both into and out of parking within the private sector.

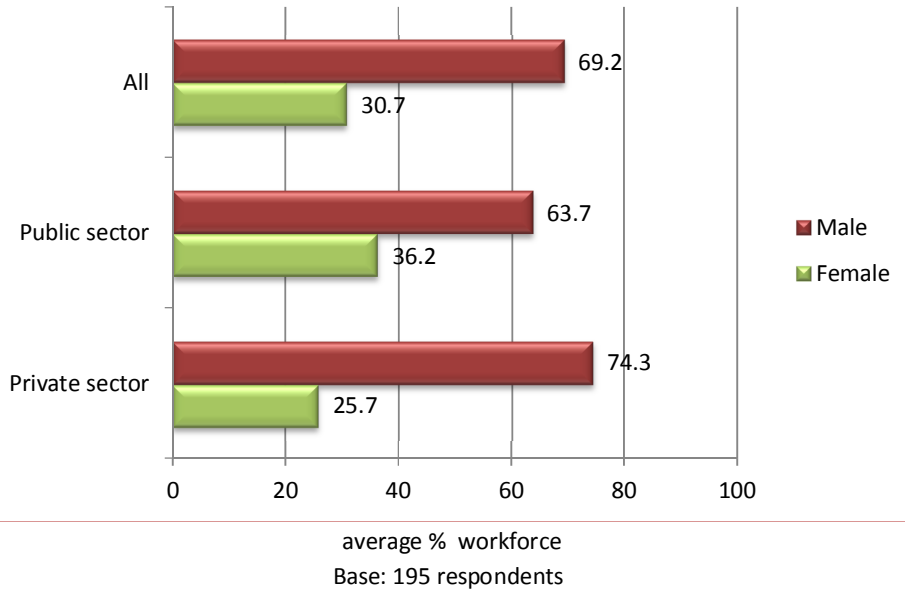
Table 12 - Staff turnover within last 12 months

Staff turnover	All	Public sector	Private sector
Very high	0.5%	1.1%	-
High	4.1%	1.1%	6.8%
Neither high nor low	12.8%	9.8%	15.5%
Low	16.9%	17.4%	16.5%
Very low	24.6%	33.7%	16.5%
None	41.0%	37.0%	44.7%
Don't know	0.0%	-	-

Base: 195 respondents

The gender mix of the parking workforce as reported by employers is two-thirds male, with the private sector consisting of an even higher proportion of male workers.

Figure 3 - Gender



Comparison with the 2006 workforce survey

The gender mix is identical to the findings from 2006, when 69.4% of the workforce were reported to be male and 30.6% female.

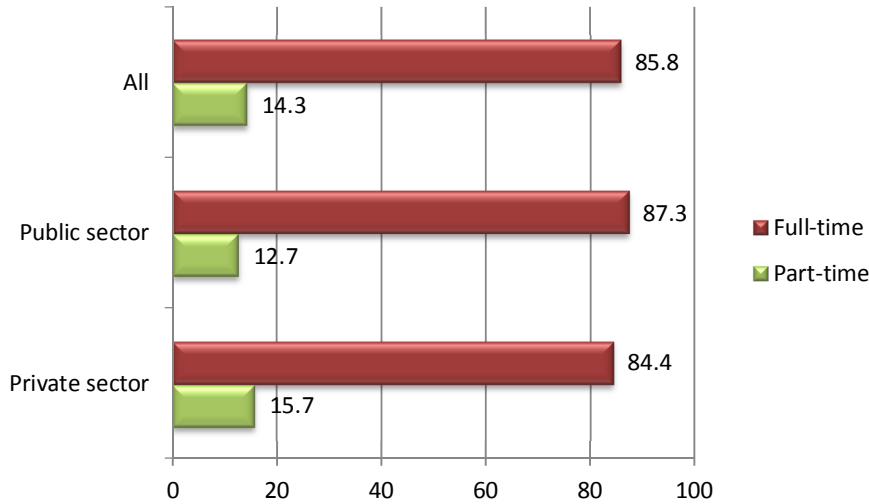
Comparison with UK labour force data (March to June 2011)

Overall, the parking sector contains a higher proportion of male employment than the UK averages which are 54% males and 46% females.

Source: ONS Statistical Bulletin – Labour Market Statistics (June 2011)

The majority of parking-related occupations are full-time positions (86%), with marginally more part-time positions operating in the private sector than the public sector.

Figure 4 - Full Time/Part time



average % workforce
Base: 194 respondents

Comparison with the 2006 workforce survey

In the 2006 survey, 96% of respondents were reported as being employed in full-time positions, suggesting that there are now more flexible working opportunities than in previous years.

Comparison with UK labour force data (March to June 2011)

Overall, the parking sector contains a higher proportion of full-time workers than the national averages which are:

Full-time employment: 73%

Part-time employment: 27%

Source: ONS Statistical Bulletin – Labour Market Statistics (June 2011)

Over a third of parking sector employees are aged over 50. The private sector appears to be more attractive to the younger labour market, with over a fifth of employees aged under 30.

Table 13 - Age bands

Age Band	All	Public sector	Private sector
16-17	0.1%	0.0%	0.2%
18-24	5.5%	4.9%	6.1%
25-29	12.9%	10.2%	15.2%
30-39	26.4%	23.8%	28.6%
40-49	25.7%	26.7%	24.9%
50-59	21.2%	26.3%	16.7%
60-64	5.8%	6.0%	5.6%
65+	2.5%	2.2%	2.8%

average % workforce

Base: 194 respondents

Comparison with the 2006 workforce survey

On average, 6% of the workforce are aged under 25 which is an increase from the figure of 2.3% reported in the 2006 survey. This suggests that the parking sector has increased the volume of young/new industry entrants within the last five years.

Comparison with UK labour force data (February to April 2011)

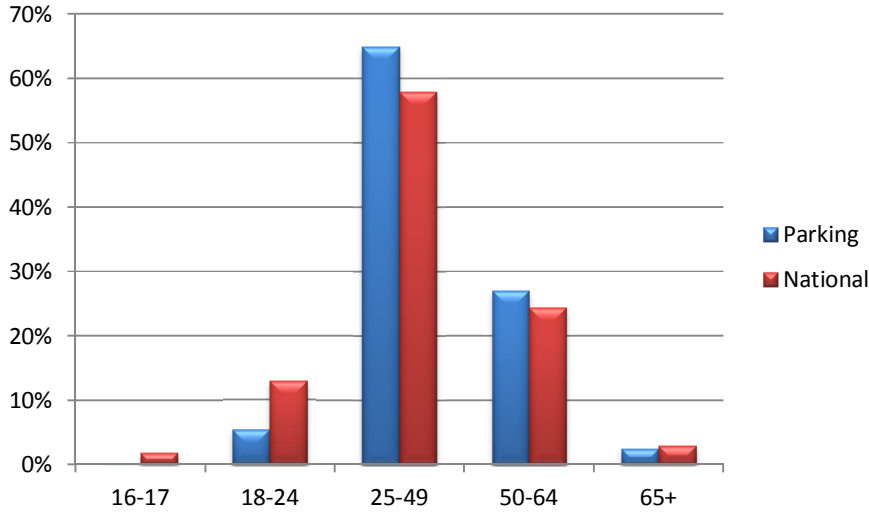
The proportion of under-25 year olds employed in the parking sector is almost a third that of the UK working average, while the proportion of the parking workforce aged over 50 is in line with the UK average. Figure 5 compares the findings from this research with the national averages.

UK

- 16-17: 1.8%
- 18-24: 12.9%
- 25-34: 22.2%
- 35-49: 35.8%
- 50-64: 24.4%
- 65+: 2.9%

Source: ONS Statistical Bulletin – Labour Market Statistics (June 2011)

Figure 5 - Age Bands (Parking sector and UK comparison)



The parking workforce is 88% white, with ethnic minority individuals primarily located in the private sector (Table 14).

Table 14 - Ethnic groups

Ethnic Group	All	Public sector	Private sector
White	87.5%	91.9%	83.4%
Mixed	1.8%	1.4%	2.1%
Asian or Asian British	4.6%	2.4%	6.7%
Black or Black British	4.2%	3.1%	5.4%
Chinese	0.3%	0.1%	0.4%
Other	1.9%	1.4%	2.3%

average % workforce

Base: 188 respondents

Comparison with the 2006 workforce survey

In the 2006 survey, 95% respondents stated that their ethnic origin was white, suggesting that the parking sector has increased its proportion of ethnic minority employment by 7.5% within the last five years.

Comparison with England & Wales resident population data (2009)

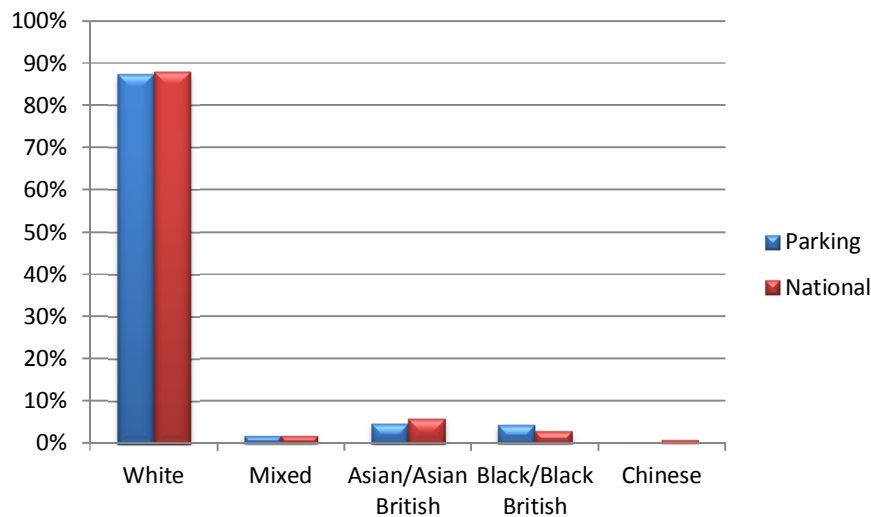
The ethnic mix of the parking sector workforce is roughly in line with the ethnic mix of the UK population as at 2009. Figure 6 compares the findings from this research with the national averages.

England & Wales

- White: 88.0%
- Mixed: 1.8%
- Asian or Asian British: 5.8%
- Black or Black British: 2.8%
- Chinese: 0.8%
- Other: 0.8%

Source: ONS Table EE1 – Estimated resident population by ethnic group and sex, mid-2009

Figure 6 - Ethnic Groups (Parking sector and UK comparison)



Migrant workers from the EU and beyond currently account for a very small minority of the workforce across both the public and the private sectors (Tables 15 and 16). The parking sector appears to employ a lower proportion of EU and non-EU migrant workers than the UK average.

Table 15 - Migrant workers from the EU

All	2.2%
Public sector	2.1%
Private sector	2.2%
UK average (January to March 2011) ¹⁵	4.5%

average % total workforce

Base: 187 respondents

Table 16 - Migrant workers from outside the EU

All	1.5%
Public sector	0.8%
Private sector	2.1%
UK average (January to March 2011) ¹⁶	5.5%

average % total workforce

Base: 187 respondents

¹⁵Source: ONS Statistical Bulletin – Labour Market Statistics (June 2011)

¹⁶Source: ONS Statistical Bulletin – Labour Market Statistics (June 2011)

The parking sector workforce now appears to be slightly better qualified than reported by Asset Skills/BPA in the 2010 Sector Skills Assessment (SSA) for the parking sector (see Table 17 and subsequent comparison).

There is a slight reduction in the numbers of parking sector employees holding no formal qualifications – reported at 5.6% in the latest research compared with 8% in the SSA. Despite this improvement, over a fifth of the overall workforce remain qualified below Level 2 (including no formal qualifications), with this issue being most noticeable within the public sector. This could be due to a wide variety of reasons, such as: the opportunity to participate in vocational learning; the degree to which there is reliance on experience as opposed to formal qualifications; and the propensity for an individual to progress in their chosen career for which qualifications may be considered valuable.

The parking workforce is currently less highly qualified than the UK average across all sectors; 39.1% of the parking workforce hold their highest qualification at minimum Level 3 compared with 51% across all sectors in the UK as reported by the 2010 SSA.

Table 17 - Highest qualification level held

Highest Qualification Level (QCF)	All	Public sector	Private sector
Levels 5 and above (foundation degree/HND and above)	5.2%	1.4%	8.6%
Level 4 (certificate of higher education/HNC equiv)	13.5%	8.5%	17.9%
Level 3 (A-level equiv)	20.4%	15.7%	24.6%
Level 2 (GCSE/O level A-C equiv)	39.0%	45.2%	33.4%
Level 1 (GCSE/O level D-G equiv)	16.9%	25.4%	9.6%
No qualifications held	5.6%	5.0%	6.2%

average % workforce

Base: 172 respondents

Comparison with UK Annual Population Survey data (2009)

The information from this table was published in the BPA/Asset Skills 2010 Sector Skills Assessment for the parking sector. No previous information had been collected in relation to highest qualification levels held within the parking sector.

UK

Highest Qualification Level	Parking	Asset Skills all sectors	All UK sectors
Level 4 and above	19%	22%	35%
Level 3	16%	12%	16%
Trade Apprenticeship	7%	3%	5%
Level 2	21%	15%	16%
Below Level 2	15%	17%	12%
Other quals	12%	11%	8%
No quals held	8%	21%	8%

Source: Annual Population Survey, 2009

5.4 Drivers of change

The exploration of change impacting on the parking sector addresses the following:

- Issues expected to face employers over the next five years;
- Issue expected by employers to have the single biggest impact within the next five years;
- Impact of future issues on meeting skills needs.

The most important issues expected to impact on employers in the next five years are ‘customers demanding more from parking’ and ‘external economic factors’ (Figure 7). Perhaps unsurprisingly in the current era of spending cuts, ‘external economic factors’ is of greatest concern within the public sector, with 37.5% of local authorities citing this as the most important issue, as compared with 20.8% of private sector employers.

Figure 7 - Issues expected over the next five years

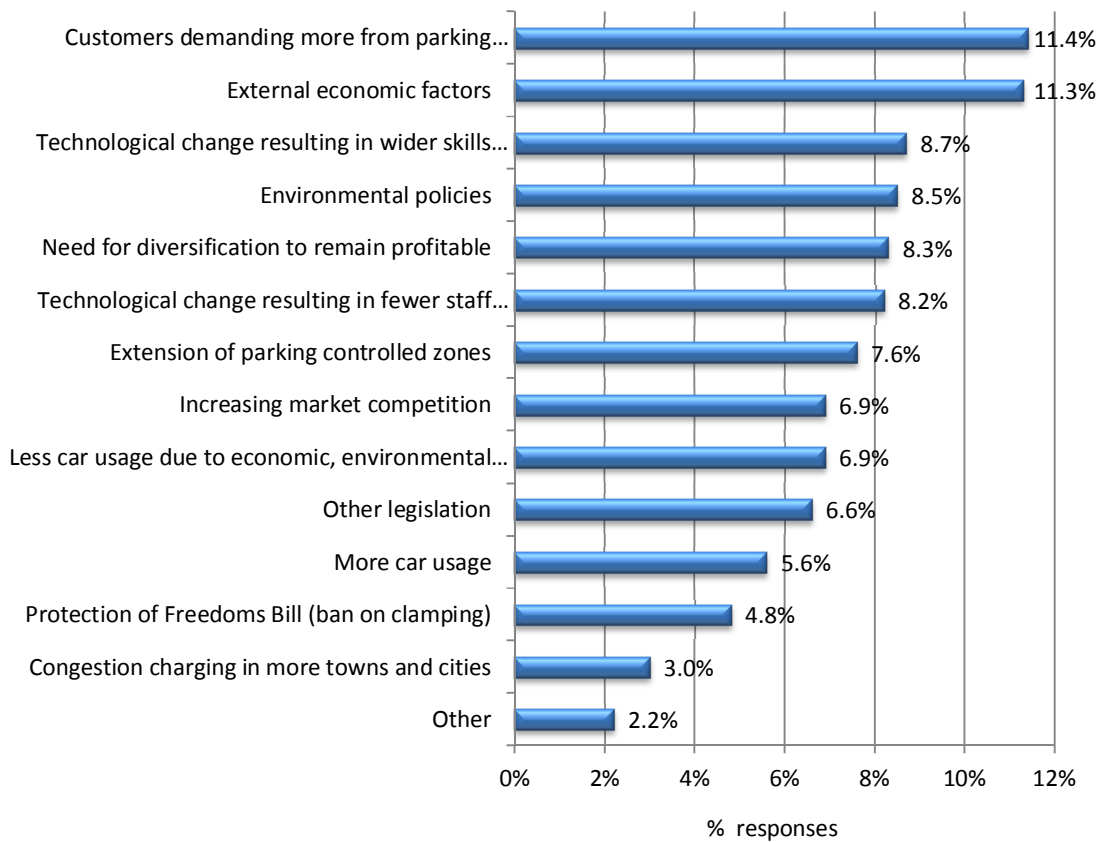
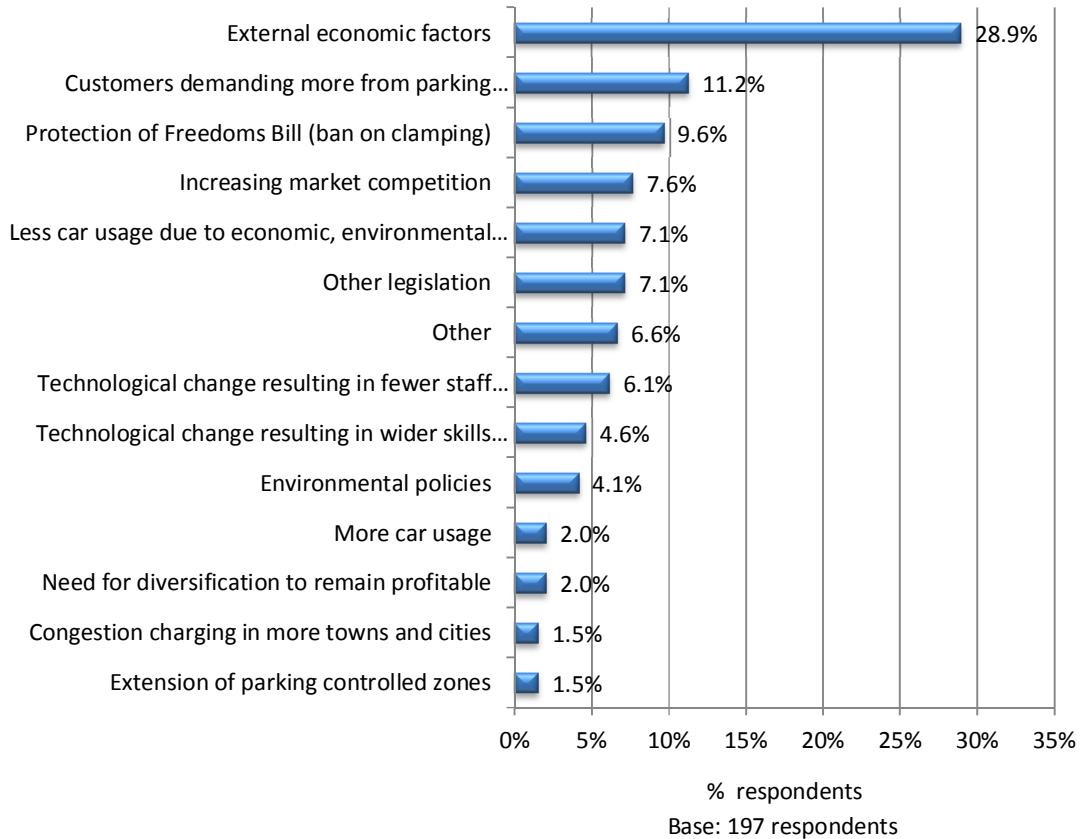


Figure 8 - Single issue that will have greatest impact over next five years



Comparison with 2006 workforce survey

In 2006 the top issues reported to be facing the sector were: ‘congestion charging’; ‘customers demanding more from parking services’; ‘the changing role of the parking attendant’; and ‘greater car usage’. Only one of these issues (‘customers demanding more from parking services’) remains a key issue in 2011.

In sharp contrast to the findings from 2006 – ‘less car usage’ as opposed to ‘more car usage’ now presents a greater issue. Rising fuel prices, increased use of shared and public transport, greater awareness among the public about minimising CO2 emissions, and the tightening of purse strings during the recession may all be factors. It is perhaps not surprising that ‘external economic factors’ did not feature as an issue facing the parking sector back in 2006 – this is very much a new and on-going challenge.

Impact of the Traffic Management Act (2004) on skills needs:

As part of the current research, employers were asked to comment on the impact of the Traffic Management Act on their organisation’s skills needs, following its full implementation on 31st March 2008.

The majority of public sector respondents stated that the Act had impacted upon their organisation, requiring top-up learning (such as via short courses) to ensure staff knowledge was up to date, along with making some operational changes and updating documentation. In some cases local authorities had already invested in training of CEOs following decriminalisation of parking activities and a minority of local authorities commented specifically that they had gone on to invest in learning relating to conflict management, including qualifications awarded by City & Guilds.

Of all local authorities in England and Wales who responded to this question (89 respondents), just over a fifth stated or suggested that the Act had not impacted on their organisation’s skills needs.

Employers are particularly keen to access more job-specific learning and development, i.e. that which is better tailored to their individual business needs (Table 18).

Table 18 - Impact of future issues on meeting skills needs

Impact on meeting skills needs	All	Public sector	Private sector
Need for greater investment in learning and development	20.7%	22.6%	18.2%
Need for better structured learning and development	19.3%	22.6%	14.9%
Need for more job-specific learning and development	24.9%	25.6%	24.0%
Need for more varied and flexible learning tools, such as e-learning	17.6%	18.1%	16.9%
No change	14.7%	9.5%	21.4%
Other	2.8%	1.5%	4.5%

% total responses

Base: 353 responses from 189 respondents

5.5 Impact of the UK Parking Sector Skills Strategy (UK PSSS)

Employers' feedback on specific aspects of the UK Parking Sector Skills Strategy enable an assessment of the impact and success of the strategy, as part of the on-going journey to improve skills and professionalism in the parking sector.

Employers were asked to rate on a scale of 1 to 10 (with 1 being 'no improvement' and 10 being 'significant improvement'), the extent to which the parking sector has improved over the last five years according to eight specific contributory factors. These factors represent the BPA's key areas of work within the remit of the UK PSSS.

The average rating in respect of each factor is summarised in Table 19.

In surveys of this nature a reasonable benchmark is considered to be a score of '7' – this rating is usually granted by survey respondents to express conditional approval but with a degree of caution where all the facts may not be in the possession of the respondent.

It is clear that some progress has been made across all areas of work although, overall, this falls short of the benchmark of '7' in all areas. The BPA appears to have made most progress in relation to 'overall professionalism of the sector', with the most challenging area being 'opportunities for career progression'.

Across most factors, local authorities have provided marginally higher ratings than private sector employers, indicating either that improvements have not been realised to the same extent in the private sector, or that private sector employers are currently less engaged with these areas of work.

Table 19 - Rating of parking sector improvements in the last five years

Factor	Overall Rating	Public Sector Rating	Private Sector Rating
Public perceptions of the parking sector	4.6	4.7	4.4
Workforce demand for L&D	5.1	5.3	4.9
Opportunities for L&D	5.3	5.6	5.1
Quals and learning relevant/fit for purpose	5.0	5.6	4.4
Consistency in standards and competence	5.4	5.6	5.3
Opportunities for career progression	4.2	3.9	4.5
Overall job satisfaction	5.9	6.0	5.8
Overall professionalism of the sector	6.7	7.0	6.3

Average improvement rating by employers where 1 = no improvement and 10 = significant improvement

Range of ratings given: 1 to 10

Base: 167-188 respondents (not all respondents rated each factor)

Employers were asked to provide reasons for the ratings given in respect of each factor. As might be expected the views vary considerably and a snapshot of comments reflecting recurring themes and divergent opinions for each of the factors are presented below.

Public perceptions of the parking sector

"The public's awareness has improved and the industry is better regulated than it used to be"
"The public is more aware through the BPA, television and internet"
"It has got worse as the public want more and more from the parking sector"

Workforce demand for learning and development

"The staff are very proactive with training which is good for the hospital"
"It's not just about the workforce's demand for training; external legislation pushes for qualifications"
"The workforce needs a push to learn new skills, they are happy just doing the basics"

Opportunities for learning and development

"There have been vast improvements in courses and availability"
"The BPA has made it much easier to get qualifications in the public sector, City & Guilds etc."
"It is difficult with the council's budget; there is no training or recruitment at the moment"

Qualifications and learning that are relevant and fit for purpose

"They are better targeted to the needs of the job with good support."
"City & Guilds 'Notice Processing' course is now much more readily available"
"I am not aware of any"

Consistency in standards and competence

"TMA 2004 has raised awareness of training needs"
"The consistency is improving with the standards, but the industry can still get a lot better"
"There are huge variations between boroughs; one will allow an appeal where others won't"

Opportunities for career progression

"Not locally but there are nationally if you want to move on"
"Historically people have just fallen into parking within the council"
"There is not enough staff turnover to generate progression"

Overall job satisfaction

"There is more training and a supportive management"

"This has gone down mainly from outside influences, such as council cut backs"

"It depends on the job; CEO's don't like the public abuse they receive"

Overall professionalism of the sector

"It is very good; the BPA has helped by getting more information onto news channels"

"The public expectation has pushed us to become a much more professional industry"

"It is legislation driven"

In respect of occupations that are hard to recruit for because of a shortage of skills, Table 20 shows that a quarter of survey respondents believe one or more specific job roles are hard to recruit for this reason. Of those that responded from the public sector, this applies most notably in respect of PAs/TAs/CEOs, whereas in the private sector a wider range of specific occupations and job titles were cited.

This question attracted a limited number of responses and three quarters of respondents did not state any occupations which they find hard to recruit for because of a shortage of skills.

Table 20 - Occupations hard to recruit for because of a shortage of skills

Occupations	All	Public sector	Private sector
Strategic Managers/Directors	1.6%	3.8%	-
Parking Managers	6.3%	7.7%	5.4%
Contract Managers	3.2%	3.8%	2.7%
Notice Processing/Debt Recovery Managers	1.6%	3.8%	-
Car Park Managers	7.9%	7.7%	8.1%
General business managers (inc. HR/Sales/Finance/Marketing)	3.2%	-	5.4%
All other managerial roles	0.0%	-	-
Contract Compliance Officers	0.0%	-	-
Notice Processing Officers	4.8%	7.7%	2.7%
PA/TA/CEO Supervisors	3.2%	-	5.4%
All other supervisory roles	1.6%	-	2.7%
PA/TA/CEOs	20.6%	42.3%	5.4%
Vehicle Immobilisation and Removal Officers	4.8%	-	8.1%
Civil Enforcement Officers	0.0%	-	-
CCTV Enforcement Officers	0.0%	-	-
All other customer facing roles	3.2%	-	5.4%
All other administrative roles	3.2%	-	5.4%
Other technical	15.9%	11.5%	18.9%
Other:	19.0%	11.5%	24.3%

% total responses

Base: 63 responses from 51 respondents

Just under a third of survey respondents identified that one or more skills are lacking within their workforce, with the highest ranked skills gaps across both the public and private sectors provided below.

Table 21 - Highest ranked skills lacking within the existing workforce

Public sector	Private sector
Written communication	Written communication
Verbal communication	Verbal communication
Knowledge of the parking sector, including legislation	IT – general skills
Management and leadership	Knowledge of the parking sector, including legislation
IT – general skills	Customer service

As is common across other industry sectors, generic and transferrable skills such as written communication and verbal communication are clearly very important to employers in the parking sector. IT skills are also notable for their deficiencies among some private sector employers – perhaps not surprising as technological change is bearing an increasing influence on the activities of employers. Finally, the importance of knowledge about the parking sector and associated legislation should not be underestimated in light of increasing regulation.

Table 22 - Skills lacking within the existing workforce

Skills	All	Public sector	Private sector
Verbal communication	14.2%	14.1%	14.3%
Written communication	17.5%	20.3%	14.3%
Numeracy	5.8%	4.7%	7.1%
English for speakers of other languages	4.2%	4.7%	3.6%
IT - technical support	5.8%	6.3%	5.4%
IT - general skills	13.3%	9.4%	17.9%
Customer service	5.8%	3.1%	8.9%
Conflict management	6.7%	6.3%	7.1%
Knowledge of the parking sector, including legislation	13.3%	14.1%	12.5%
Health and Safety awareness	2.5%	1.6%	3.6%
Management and leadership	8.3%	14.1%	1.8%
Don't know	-	-	-
Other	2.5%	1.6%	3.6%

% total responses

Base: 120 responses from 59 respondents

Comparison with the 2006 workforce survey

The 2006 survey reported that 47% of respondents felt that ‘good communication skills’ were lacking among the overall workforce – primarily cited by respondents in a management position. While communication skills are still lacking today, the extent of these gaps appears to be somewhat reduced given that only one third of employers reported one or more skills lacking among the workforce.

Various approaches have been used by employers in the last two years to enable the workforce to access learning and development¹⁷. Almost all employers responded to this question, with at least three different approaches to learning and development used by each employer on average. This illustrates that some degree of learning and development is facilitated across almost all parking sector organisations.

Table 23 - Top 5 approaches used for accessing learning and development in the last two years

Public sector	Private sector
On-the-job learning (including job shadowing)	On-the-job learning (including job shadowing)
Private learning provider courses	Courses or seminars run by your own staff
Courses or seminars run by your own staff	Self-learning (using books, manuals, CD-Roms or other materials)
Self-learning (using books, manuals, CD-Roms or other materials)	Private learning provider courses
Professional/trade body events	Professional/trade body events

¹⁷ A period of two years was selected to ensure recent and up-to-date learning approaches were reported.

The most popular approach to delivery of learning and development is ‘on-the-job’, followed by other internal or self-directed learning. This is particularly noticeable in the private sector, with these employers less inclined than their public sector counterparts to access learning through external learning providers and other events.

Table 24 - Approaches used for accessing learning and development in the last two years

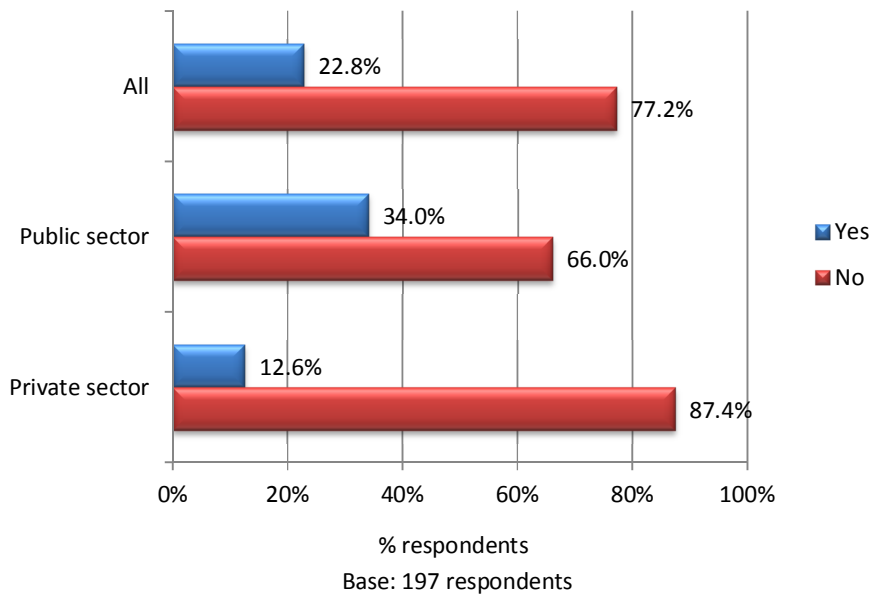
Approaches to L&D	All	Public sector	Private sector
On-the-job learning (including job shadowing)	24.4%	21.3%	29.0%
Courses or seminars run by your own staff	16.7%	14.8%	19.5%
Self-learning (using books, manuals, CD-Roms or other materials)	14.9%	13.3%	17.1%
College courses	6.4%	6.6%	6.1%
Private learning provider courses	13.3%	16.2%	9.2%
University courses	2.1%	1.9%	2.4%
Professional/trade body events	10.4%	12.4%	7.5%
Externally run conferences	10.0%	11.9%	7.2%
Don't know	0.4%	0.5%	0.3%
Other	1.4%	1.2%	1.7%

% total responses

Base: 720 responses from 190 respondents

The majority of employers have not experienced issues accessing qualifications, learning and development in the last five years (Figure 9), however there is a marked difference between public and private sector employers in that just over a third of public sector respondents report issues as opposed to 13% of private employers.

Figure 9 - Any issues accessing qualifications, learning & development in the last five years



A range of barriers have impeded employers from accessing qualifications in the last five years. The most significant barrier is 'cost', particularly among public sector employers, followed by 'too time-consuming'. Private employers are also less convinced about the relevance of qualifications to their business needs.

Table 25 - Top 5 barriers preventing access to qualifications in the last five years

Public sector	Private sector
Too expensive	Too expensive
Too time-consuming	Learning and qualifications are not relevant to business needs
Learning and qualifications are not relevant to business needs	Too time-consuming
No local providers	No local providers/not suitable
Course dates and times not convenient	Course dates and times not convenient

Table 26 - Barriers preventing access to qualifications in the last five years

Barriers	All	Public sector	Private sector
No local providers	7.1%	7.6%	6.3%
Local providers are not suitable	3.1%	1.5%	6.3%
Course dates and times not convenient	6.1%	6.1%	6.3%
Learning and qualifications are not relevant to business needs	13.3%	10.6%	18.8%
Difficult to get information about courses	4.1%	3.0%	6.3%
Too expensive	31.6%	36.4%	21.9%
Too time-consuming	14.3%	15.2%	12.5%
Previous negative experiences of learning	2.0%	1.5%	3.1%
Staff reluctant to be trained	1.0%	1.5%	-
Staff fully proficient	3.1%	3.0%	3.1%
Don't know	1.0%	-	3.1%
Other	13.3%	13.6%	12.5%

% total responses

Base: 98 responses from 62 respondents

Qualifications, learning and development needs that are hard to source:

Respondents were asked to provide specific details relating to any qualifications, learning and development needs that they find hard to source. A small minority of employers provided details and their responses are provided below:

"Notice Processing"

"Civil Parking Enforcement"

"More managerial and supervisory qualifications"

"Certificate/Diploma/Degree level qualifications in parking management"

"Single day courses at parking management level to give people an overview of the sector"

"City & Guilds Level 2 Parking Attendant"

"CCTV course"

"CCTV training that is Security Industry Authority (SIA) approved"

"More off-street parking attendant training"

"Customer service in parking"

"Event traffic and parking courses"

"Complaint procedures – how to handle appeals and irate calls"

"Marketing and sales knowledge"

"Parking sector design courses"

5.6 Impact of the Institute of Parking Professionals (IPP)

Employers' feedback on the activities of the Institute of Parking Professionals (IPP) was explored in relation to the following key areas:

- How employers currently recognise the IPP;
- Value of services offered by the IPP;
- Whether employers would like to receive further information about the IPP.

Recognition of the IPP refers to any method used by employers to encourage or incentivise membership of the IPP among their workforce.

As illustrated by Table 27, around a third of employers currently recognise the IPP, with just over a fifth paying for membership of their workforce on an on-going basis. This is even more the case within the public as opposed to the private sector.

Around two thirds of employers do not currently encourage or incentivise membership of the IPP.

Table 27 - Recognition of the IPP

Type of recognition	All	Public sector	Private sector
Pay for staff membership in full and on-going	21.2%	25.3%	17.5%
Pay for staff membership for a limited period	1.0%	0.0%	1.9%
Encourage staff to join at own expense	12.1%	14.7%	9.7%
Currently don't recognise the IPP (i.e. none of the above)	65.7%	60.0%	70.9%

% respondents

Base: 198 respondents

Employers who currently 'recognise' the IPP were asked to rate on a scale of 1 to 10 (with 1 being 'not at all valuable' and 10 being 'extremely valuable'), the extent to which each of the IPP's core services are valued. The average rating in respect of each factor is summarised in Table 28.

As explained in respect of Table 19, a reasonable benchmark is considered to be a score of '7'. There is considerable positivity in respect of most services, with 'updates on sector news/legislation' of particular value, as well as the IPP's contribution to the overall professionalism of the parking sector.

With respect to most services, local authorities have provided higher ratings than private sector employers, indicating a higher degree of engagement with the IPP by employers in the public sector.

Table 28 - Rating of services offered by the IPP

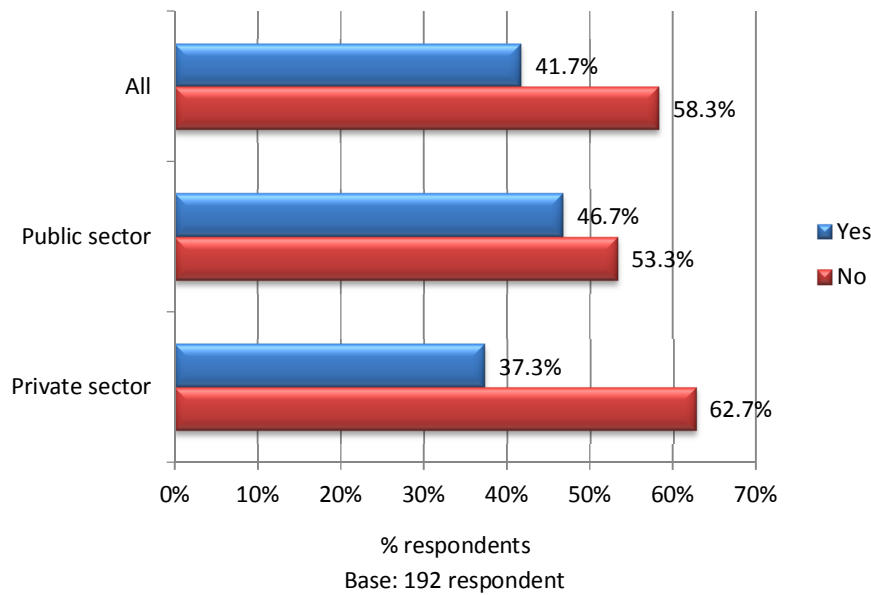
Factor	Overall Rating	Public Sector Rating	Private Sector Rating
Acquiring Member or Fellow Status	5.8	5.4	6.2
Recognition of quals and experience	7.0	7.1	6.9
Networking opportunities	6.5	7.0	5.8
CPD – including support and advice	6.7	7.0	6.2
Updates on sector news/legislation	7.3	7.7	6.9
Careers information	5.9	6.3	5.4
Access to member-only section of website	5.9	6.0	5.8
Overall professionalism of the sector	7.4	7.5	7.3

Value rating by employers where 1 = not at all valuable and 10 = extremely valuable

Base: 68 respondents (that recognise the IPP)

All survey respondents were asked whether they would like to receive further information about the IPP. As shown in Figure 10, some 42% of employers have expressed interest in finding out more about the IPP, with slightly more interest among local authorities.

Figure 10 - Further information about the IPP?



What else should the IPP offer?

Respondents were asked to provide their views on what else they would like to see offered by the IPP. A very small minority of respondents provided specific suggestions – these are presented below which also serve to illustrate respondents’ understanding of what the IPP currently offers and what they consider to be within the remit of the IPP:

“The BPA needs to open up to operational staff; it tends to be just for managers”

“Progression to fellowship without having to travel to London [for interviews] – It should be localised”

“An opportunity to share knowledge and significant change would be a good idea”

“IPP membership levels should reflect the degree of training held”

“Improve awareness among CEOs”

“Cheaper courses”

“IPP specific seminars that reflect the issues/concerns of its members”

“More networking opportunities; the IPP needs to advertise itself more and persuade employers to use it”

“It needs to be about pushing the Government and lobbying for changes”

“Arrange meetings so members can share their experiences and knowledge”

“Cheaper insurance for members”

“Clearer information on the benefits of membership”

“Monthly direct debits to assist with the cost of membership”

6. Qualitative Research – Key Themes and Issues

This section outlines the key themes and issues emerging from the 25 qualitative interviews with employees, as well as the focus group as part of the Learning and Development Network Forum.

6.1 Positives and negatives about working in the parking sector

On the whole, employees value the variety of work that goes with working in the parking sector, in terms of the tasks undertaken and the fact that each day can be different when working directly with the general public. Job satisfaction is ultimately gained from being able to provide helpful and accurate information and advice to better inform the general public.

Job satisfaction among employees continues to be adversely affected by having to deal with aggression and abuse from members of the public, as well as the burden of legislation that can sometimes make the job difficult, particularly in a back-office role.

Employees generally support the issues raised by employers that there are limited opportunities for career progression within parking, particularly within a local authority environment. Career blockages exist particularly due to high volumes of operatives (such as CEOs and Notice Processing Officers) and a comparably small number of supervisor or specialist positions.

The challenge associated with career progression needs to be counter-balanced with the fact that the majority of employees interviewed, particularly those in operative roles, are happy in their roles and do not necessarily want to move on.

Several employees stated aspects of working in the parking sector that they would like to change, including the following main points:

- *Main issue is still negative public perceptions about the parking sector;*
- *Tender specifications ought to be less prescriptive;*
- *The parking service ought to be better integrated with the rest of the council;*
- *Communication levels within the parking department ought to improve;*
- *There should be better standardisation in the application of parking rules across different localities.*

6.2 Impact of change affecting the parking sector

Change in the parking sector is primarily driven by legislation, in particular the Traffic Management Act 2004, the Protection of Freedoms Bill (proposed ban on private clamping) and Codes of Practice such as the Approved Operator Scheme (AOS). Legislative change goes hand in hand with the need for employees to demonstrate a greater degree of specialist knowledge, particularly in relation to the debt recovery and appeals process. The degree of technical specificity goes hand in hand with the need for strong customer service and communication skills (both written and oral).

The degree to which these changes have impacted on parking sector organisations varies considerably, although the impact has been felt most significantly among local authorities. Some employers stated that they have been proactive in identifying and responding to legislative change, whereas others have been more reactive as a result of the TMA 2004. Anecdotal evidence from the focus group suggests that some private organisations still do not operate in full compliance with AOS at all times, which poses wider reputational risks for the sector.

Technological change provides more opportunities for private sector organisations to develop business opportunities with local authorities, such as cashless parking solutions, photo-imaging and remote-sensor parking bays. These developments are not going to be appropriate in all local settings and there is some uncertainty and concern around the likely impact of automation on the size of the future workforce, particularly in respect of frontline enforcement roles.

Employees generally feel that legislative change, technological change and more learning and development opportunities within the last five years have had a positive impact on their job roles. According to those Civil Enforcement Officers interviewed as part of the research, their role is now much more broadly encompassing, including the provision of information and advice to the general public, as well as educating the public about the importance of parking legally.

6.3 Learning and development

Employees are generally positive about the value of parking-related qualifications; the main reasons being to understand more about regulations that affect parking and how to deal effectively with confrontational situations. Some employees commented that short top-up learning is equally important, as is the value of experience and generic skills such as effective communication.

Learning and development (including qualifications) are generally perceived by employees to be good and worthwhile, particularly the C&G Level 2 Award for Civil Enforcement Officers. Some employees commented that CEO qualifications covered ground that they already knew but it was useful to reinforce and build on that knowledge.

Employees feel that learning and development is relatively easy to access, particularly online learning modules, however they were less sure about whether accessibility to qualifications had improved in the last five years. A recurring barrier among employees is whether the employer is prepared to pay for courses.

Focus group participants highlighted a number of inconsistencies among local authorities relating to their appetite for, and application of, qualifications:

- Firstly, some local authorities are reluctant to invest in qualifications to build the specialist knowledge requirements of back office staff, e.g. Notice Processors; this is believed to be due to local authority leaders' lack of recognition around the specific knowledge requirements of these staff, in some cases perceiving the role to be predominantly administrative;
- Secondly, local authorities' individual interpretation of parking contraventions, coupled with their own organisational policies, may mean that knowledge gained through Vocationally Related Qualifications (VRQs) needs to be further contextualised in the workplace;
- Thirdly, there are concerns that NVQ qualifications focussed on assessing competence rather than teaching new skills and knowledge are not seen as cost-effective by local authorities.

Despite the issues raised during the focus group discussion - evidence from the survey highlights that most local authorities believe changes are required in relation to learning and development, such as better structured learning and more job-specific content (Table 17). Indeed focus group participants argued that the BPA's commitment to learning and development needs to continue, including more qualifications aimed at parking managers.

These issues highlight the importance of a balanced perspective when considering future developments relating to learning and development, i.e. by taking on board the qualitative issues raised whilst also listening to what employers would like to see changed.

6.4 Local authority engagement with parking services

Approximately 65% of local authorities are members of the BPA, highlighting the potential to engage with the remaining 35% of local authorities that are not currently members.

Focus group participants raised concerns that some local authority leaders do not regard parking as a key commercial operation despite it being a high revenue earner. Strategic changes within parking services are generally formed from reactive responses to negative press or as part of pre-election tactics, rather than as part of a defined strategy with measurable key performance indicators. Furthermore, not all local authority leaders appear to be fully informed in relation to the skills and knowledge required by specialist parking staff, particularly Notice Processing Officers who are often perceived as ‘administrators’.

6.5 Context in which the Institute of Parking Professionals (IPP) operates

While the employer survey yielded a number of positive messages about the services offered by the IPP (see section 5.6), the focus group highlighted several challenges for the future.

The parking sector does not require IPP membership as a licence to practise, in contrast to recognised ‘professions’ such as accountancy. Exacerbating this issue is the fact that parking may be secondary to core activity (e.g. Bailiffs), thereby limiting the appetite of these roles to join the IPP in favour of one or more other organisations.

Discussion around these issues at the focus group called into question the meaning of ‘profession’ and ‘professionals’. The parking sector may be considered a profession in the same way as ‘health’ or ‘teaching’, i.e. some but not all individuals working within may be considered ‘professionals’ who require a licence to practise.

Other issues affecting the IPP include those relating to cost and career development. The current economic situation acts as an inhibitor to the funding of IPP membership, i.e. available funding is allocated to other priority areas, while membership of the IPP was considered by focus group participants to be less attractive for individuals without a clear parking career plan.

7. Conclusions

7.1 Key Successes

1. Improvements to skills and professionalism

Feedback from employers has generally been positive, indicating the BPA is carrying out the right kinds of activities to help improve the skills and professionalism of the sector. The ratings given by employers in respect of each area of the UK Parking Sector Skills Strategy (UK PSSS) show that progress has been made in some areas more than others, with a particular strength being 'overall professionalism of the sector' for which employers rated improvement at 6.7 out of 10.

Relevant report section: 5.5; Table 19

2. Better qualified and more diverse workforce

Evidence suggests that the parking sector workforce is becoming more qualified, with a slight reduction in the numbers of employees with no formal qualifications (from 8% in 2009 to 5.6% in 2011). The sector now reports more flexible part time working arrangements (14.3% part time employment compared with 4% in 2006); there appear to be more young people entering the sector (approximately 6% of the workforce fall into the 16-24 age bracket compared with 2.3% in 2006); and there is a wider base of ethnic minorities (12.5 % compared with 5% in 2006).

Relevant report section: 5.3 (in particular Figures 4 – 6 and Table 17)

3. Institute of Parking Professionals is generally well regarded

Among those employers that recognise (promote and incentivise) membership of the Institute of Parking Professionals among their workforce, the average 'value' ratings given for each of the IPP's services range from between 5.9 and 7.4 out of 10. A key challenge for the IPP going forward will be wider and more effective promotion of membership benefits, given that the majority of employers surveyed were either not aware, or did not currently recognise the IPP.

Relevant report sections: 5.6 (in particular Table 28); 6.5

7.2 General Conclusions

The general conclusions and subsequent recommendations are based upon the findings from all aspects of the research, including the employer survey, telephone interviews with employees as well as the focus group. It should be noted that the latter involved significant discussions around public sector/local authority issues deemed to be of particular significance, although the potential relevance of some of these issues in respect of the private sector should not be discounted.

4. A larger than previously estimated sector

New calculations in respect of the size of the parking sector suggest the total workforce is much larger than previously thought – consisting of approximately 82,000 individuals across both the public and private sectors. The latest estimate can be explained by improvements in sector intelligence, coupled with the robust methodology applied by the survey. As such the findings do not purport to show that the sector has grown in number since previous estimates were published.

The latest estimate is based on the average number of staff per organisation (using data from the survey) multiplied by the estimated number of UK public and private sector parking sector organisations (using national data). The figures are the most reliable to date for these reasons:

- the survey targeted one response per organisation and sought total workforce information from a business owner/manager (this differs from 2006 where a random sample approach was used and, in some cases, multiple responses were yielded from a single organisation);
- the survey achieved a representative sample of public and private sector organisations (in 2006 the survey was biased more towards the public sector);
- the total workforce calculation in respect of local authority parking employment is the most comprehensive to date, using the public sector workforce average from the survey multiplied by the total number of relevant local authorities across the UK.

Relevant report section: 4.2

5. A case to raise the profile of the BPA and its services

Ratings provided by employers concerning the impact of the UK Parking Sector Skills Strategy (UK PSSS) indicate the BPA could do more to better communicate its role and the services it has already developed. Indeed, 35% of UK local authorities (and an even greater proportion of private parking organisations) are not currently members of the BPA, pointing to untapped markets.

The sector is enduring the pressures from the recent recession, with this being the biggest single issue reported by employers in 2011. Feedback has highlighted that spending cuts are impacting job satisfaction in the public sector particularly, making it important for the BPA to help raise the profile and perceived importance of parking services within local authorities.

Relevant report sections: Section 3.1.2; Table 18; Table 19 (and subsequent justifications)

6. Inconsistencies across local authority parking services

The findings from the focus group highlighted a concerning issue that some local authority parking services lack strategic direction, with missing or inadequate KPIs to measure the success of their parking activity. This leads to inconsistencies between local authorities and could have a knock-on impact on the experiences and perceptions of the general public about parking services.

Relevant report section: 6.4

7. Parking sector less highly qualified than the UK average/insufficient awareness of the range and benefits of parking-related qualifications

Despite the BPA's work to develop a range of parking-related qualifications, the sector remains less highly qualified than UK average across all sectors, with 39.1% of the parking workforce holding their highest qualification at minimum Level 3, compared with the UK average of 51%. Furthermore, around a fifth of the parking workforce is still qualified below Level 2 (including no formal qualifications). This appears to be a more prevalent issue in the public sector.

Whilst employees are generally positive that parking-related qualifications are worthwhile and provide valuable knowledge, employers have highlighted examples of qualifications, learning and development that they find hard to source – some of which have already been developed in conjunction with the BPA. Furthermore, there is sufficient evidence from employers that the BPA needs to work harder to make learning and development more job-specific and accessible, such as through a wider range of bite-size qualifications or by showing employers how to implement the skills and knowledge gained by learners within their work environments.

Relevant report sections: Table 17 and subsequent comparison; Table 18; Table 25; Section 6.3

8. Reactive approach to professional development

Employer investment in learning and development is largely in response to legislative change rather than being driven by a proactive desire to enhance skills and individual professional development. Increased levels of media attention given to parking matters such as enforcement and clamping mean that the public are more aware of their rights and responsibilities; as such it is more important than ever that staff involved in 'customer-facing' roles such as enforcement and notice processing, have appropriate specialist knowledge and the right types of skills.

At present, customer service in the parking sector is suffering from continuing skills gaps relating to written and verbal communications, knowledge of the parking sector (including legislation) as well as general IT skills. There is also a need to encourage further professional development of managerial staff following the roll-out of qualifications aimed specifically at parking managers.

Relevant report sections: Table 21; Table 22; 6.3

9. Limited recognition of parking sector career opportunities

In relation to the UK PSSS, the BPA has made least progress against their objective to promote opportunities for career progression. In the public sector – the opportunities to move up from operative level are considered to be limited due to the high ratio of operatives to supervisors, and while this is not something the BPA can change, the sector as a whole would benefit from more information about the types of career paths available, setting career objectives, and planning for their own professional development to make their goals a reality.

Relevant report section: 6.1

10. Increasing importance of technological change

New and alternative parking solutions such as remote payment services are becoming increasingly available to the public, coupled with more sophisticated equipment in operation by enforcement as well as back office staff. Employers across both the public and private sectors need to maintain an up-to-date understanding of the benefits of these new technologies and ensure the workforce develops the requisite skills.

Technological change will lead to improved flexibility and convenience of parking services but will also raise public expectations. As such, it is important that new technologies are embraced as widely as possible across UK parking services.

Relevant report sections: 5.4 (in particular Figure 7); 6.2

11. A case to raise the profile of the Institute of Parking Professionals (IPP)

Those employers that 'recognise' the IPP (defined in terms of paying for staff membership or encouraging staff to join at their own expense) are generally positive about the value of services offered, particularly within the public sector. As such, a sound basis exists to undertake profile-raising activities targeted at the 65% of employers who do not currently recognise the IPP. The range and volume of employers' suggestions about additional services the IPP could offer, highlights some confusion between the work of the BPA and the IPP and indicates gaps in knowledge among employers around the IPP's current offer.

Evidence: 5.6 (in particular Table 28); 6.5

8. Recommendations

8.1 Summary of recommendations

The BPA's commitment to developing and maintaining standards and qualifications needs to keep pace with new challenges and opportunities that face the sector. The already-established partnerships, networks and forums will continue to help guide and inform future activities.

There are six core recommendations that build upon the conclusions in the previous section. Each recommendation contains a number of specific action points and is followed by the impact that its achievement will have.

The six core recommendations are as follows:

Recommendation 1 (supported by conclusions 4 - 6)

Enhance the marketing and communications strategy to further raise the profile of the parking sector and the services offered by the BPA.

Recommendation 2 (supported by conclusion 7)

Improve employer/employee awareness of the range and benefits of parking qualifications.

Recommendation 3 (supported by conclusion 8)

Improve employer commitment to skills enhancement as well as Continuing Professional Development (CPD).

Recommendation 4 (supported by conclusion 9)

Improve information available to employees on parking sector careers.

Recommendation 5 (supported by conclusion 10)

Support employers to adapt to on-going technological change facing the parking sector.

Recommendation 6 (supported by conclusion 11)

Further develop and promote the benefits of IPP member services both to members as well as current non-members.

8.2 Detailed recommendations

Recommendation 1:

Enhance the marketing and communications strategy to further raise the profile of the parking sector and the services offered by the BPA.

Actions:

- 1.1 Review membership records to identify duplications, missing information or potentially out-of-date information.
- 1.2 Enhance the member database into an effective Customer Relationship Management (CRM) system that includes data on existing members and new member 'prospects'; data for existing members should include up-to-date contact name/turnover/when last contacted/needs established/information provided/future contact requirements.
- 1.3 Develop and implement a new member recruitment strategy linked to the CRM system; consider a telephone-based approach to identify key business contact information and follow this up with a pre-member 'warm-up pack'; continue to use face to face events such as Parkex to raise awareness about the work of the BPA and ensure follow-up calls are undertaken.

The shape of the new member recruitment strategy may be impacted by any future changes to BPA/IPP membership structures (cf. recommendations 6.3-6.6)
- 1.4 Develop a business case to present to local authorities delivering parking services in-house – to help embed more effective approaches to operational control. This should involve enhancing the existing model contract to include KPIs relating to internal operations, for:
 - Customer (e.g. fluctuations in good/bad press; customer service surveys);
 - People (e.g. uptake of recognised qualifications);
 - Process (e.g. fluctuations in no. parking challenges/response times);
 - Finance (e.g. parking revenue trends).
- 1.5 Consider kite-marking the internal operations aspect of the model contract so that local authorities gain recognition from the BPA for achieving and being audited on minimum standards achieved. This would require local authorities to submit a self-assessment return to the BPA with supporting evidence (e.g. on an annual basis) and the BPA using defined criteria to audit performance against minimum benchmark standards.
- 1.6 Continue to lobby the Office for National Statistics for a SIC code that represents the parking sector – the case may be enhanced by the revised estimate of the size of the parking workforce.
- 1.7 Replicate labour market intelligence and skills research in future years to maintain currency of understanding in relation to the size, shape and changing needs of the parking sector.

Impact:

- Establishment of a more comprehensive Customer Relationship Management (CRM) system that enables the BPA to strategically plan for, and respond to, the needs of individual public and private sector members.
- Up-to-date records of members and turnover band information that can be processed quickly and will ensure correct membership fees are paid.
- The means to capture and review at any time an understanding of the current/topical drivers of change affecting employers' skills, learning and development needs.
- A more effective approach to help with the activity of expanding BPA membership.
- Local authority parking departments operate more robust performance management systems, with greater consistency between local authorities.
- By maintaining up to date intelligence relating to the parking sector, the BPA will be able to ensure its services are more closely aligned to the needs of employers.

Recommendation 2:

Improve employer/employee awareness of the range and benefits of parking qualifications.

Actions:

- 2.1. Continue existing work to develop and enhance the framework of parking-related qualifications by involving employers, learning providers and awarding organisations, including the BPA's existing networks and forums with the aim of encouraging wider promotion.
- 2.2. Consider developing a matrix that maps a list of specific knowledge and skills to a range of parking-related job roles, indicating for each knowledge and skills element whether required/recommended (optional) or not required for the role; each role can then be underpinned by 'solutions' in the form of qualifications. The matrix should be publicised to members through BPA-hosted events, e-communications and through existing networks and forums. **(See Appendix 2 for further details and an example template).**
- 2.3. Consider developing an employees' guide to parking-related qualifications for member employers to disseminate; tailor the guide to the needs of the employee, by highlighting steps they can take to build and develop their career, including enhancing their professional development using CPD.
- 2.4. Approach employers about sharing positive testimonials from employees that have undertaken qualifications; stimulate interest on the basis that it will provide positive publicity for the organisation; testimonials should use media such as web articles, video blogs and Parking News magazine.

Impact:

- Employers and employees will be more informed about the features and benefits of parking-related qualifications available.
- Employers will be better informed to identify where investing in specific qualifications will add value to the organisation and to the individual.

Recommendation 3:

Improve employer commitment to skills enhancement as well as Continuing Professional Development (CPD).

Actions:

- 3.1 Encourage employers to use CPD for developing and maintaining knowledge of legislation and codes of practice, as well as enhancing core relevant skills such as conflict management.
- 3.2 Continue to develop, promote and review qualifications aimed specifically at parking supervisors and managers.
- 3.3 Provide clear guidance to employers on how CPD can be implemented and effectively measured.

Impact:

- Skills and knowledge levels among the parking workforce will be enhanced by a more continual commitment to learning and development.

Recommendation 4:

Improve information available to employees on parking sector careers.

Actions:

4.1 Develop an interactive and visual careers map aimed at employees that enables individuals to plot a career within parking according to their current position and goals. The careers map should link occupations to recommended qualifications and show both vertical and lateral progression opportunities. Once complete, the map should be made available on the BPA/Asset Skills websites and potentially as a simplified/hard copy 'tree' diagram.

An example of an interactive employee-focussed careers map developed by the Sector Skills Council for building services engineering, is available to view via the URL below:

<http://www.summitskills.org.uk/careersmap/map.html>.

4.2 Develop core job profile information and carry out interviews with employees who have progressed through the parking sector. These interviews could act as testimonials to support the careers map and to enrich information that is currently available in respect of parking sector job roles.

4.3 Develop support materials to guide and assist employers as part of employee performance management. Tools should include guidance for carrying out effective appraisals, template appraisal forms, as well as tools to help employees identify their own performance strengths and development needs.

Impact:

- Employees will be better informed to identify parking as a sector in which to develop a future career.
- Employees will be better enabled to plan career goals; discuss development needs with employers (e.g. at appraisals) that can be supported by CPD activities and qualifications.

Recommendation 5:

Support employers to adapt to on-going technological change facing the parking sector.

Actions:

- 5.1 Continue to bring together 'Super' Special Interest Groups to cross-communicate information about new technology developments, including the opportunities/threats associated with their uptake by employers.
- 5.2 Continue to develop features and case studies within Parking News documenting the opportunities and issues associated with the implementation of new technologies.
- 5.3 Continue to encourage manufacturers and suppliers to sponsor events and conferences.

Impact:

- Employers will be more informed to plan for and respond to technological change.
- Wider adoption of new technologies, supported by appropriate skills development, will lead to more consistent operation of parking service operations that in turn meet the increasing expectations of the public.

Recommendation 6:

Further develop and promote the benefits of IPP member services both to members as well as current non-members.

Actions:

- 6.1 Identify clear and distinct benefits of IPP membership compared with BPA membership.
- 6.2 Identify the Unique Selling Points of the IPP compared with other professional institutions of relevance to job roles connected with the parking sector (such as Bailiffs).

The outcomes of recommendations 6.1 and 6.2 may require refinement of subsequent recommendations 6.3-6.6:

- 6.3 Develop an IPP-specific marketing and communications strategy aimed at increasing IPP membership and raising awareness about the services and benefits offered to members; use the supplied list of 2011 survey respondents who requested more information about the IPP for this purpose (cf. Annex 1).
- 6.4 Consider a specific and detailed survey of IPP members to explore the issues and concerns that the IPP can address as part of member seminars; as well as what additional benefits members would like to receive from the IPP.
- 6.5 Determine a budget/available financial resources to support more networking events and seminars across the country; host events aimed at members and non-members (including employees), to promote and advocate the benefits of professionalisation and IPP membership; consider using a mix of speakers including representatives from the IPP as well as employers who have benefited from membership of the IPP.
- 6.6 Tailor information about the benefits of joining the IPP to individuals working in different types of roles; this should be publicised in printed literature as well as online and could be supported by short filmed interviews with members.

Impact:

- Clear identity for the IPP achieved through a greater perceived distinction between its activities and those of the BPA.
- Improved awareness among employers of the range of services and benefits offered by the IPP.
- Increased membership levels.

8.3 Suggested priorities and responsibilities

Priority	Recommendation No.	Brief description	Responsibilities
SHORT TERM Task-based Fulfilment 2011-2012	1.1	Review and update membership records	Communications Team
	1.2	Enhance the member database into an effective CRM system	Communications Team
	1.3	Develop and implement BPA member recruitment strategy <i>Also listed in the 'long term' section in view of possible future changes to BPA/IPP membership structures</i>	Communications Team
	2.2	Develop a knowledge and skills matrix relevant to all parking sector job roles	BPA in conjunction with awarding organisations/Asset Skills
	2.3	Develop employee-focussed guide to qualifications and CPD	SKIPP Board and Professional Development Team in conjunction with Asset Skills
	2.4	Develop and publish employer testimonials following uptake of parking-related qualifications	SKIPP Board and Professional Development Team

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8. Recommendations - 8.3 Suggested priorities and responsibilities



	3.3	Provide guidance to employers on how CPD can be implemented and effectively measured	SKIPP Board and Professional Development Team
	4.1	Develop interactive and visual parking sector careers map	SKIPP Board, Professional Development Team and Communications Team in conjunction with Asset Skills
	4.2	Develop core job profile documents to support career development	SKIPP Board and Professional Development Team in conjunction with Asset Skills
	4.3	Develop support materials to assist employers with performance management	SKIPP Board and Professional Development Team
	6.1	Identify distinct benefits of IPP and BPA memberships <i>Outcomes of this element may require refinement of long-term recommendations 6.3-6.6</i>	SKIPP Board and Futures Group
	6.2	Identify USP of IPP compared with other relevant professional institutions <i>Outcomes of this element may require refinement of long-term recommendations 6.3-6.6</i>	SKIPP Board and Futures Group

<p>MEDIUM TERM</p> <p>Continuation and enhancement of existing strategy</p> <p><i>Up to 2013/2014</i></p>	1.4	Enhance existing local authority model contract to embed measures for improved operational control	BPA SKIPP Board and Professional Development Team
	1.5	(Linked to 1.4) Consider kite-marking internal operations aspect of model contract	BPA SKIPP Board and Professional Development Team
	2.1	Continue to develop and enhance parking-related qualifications	SKIPP Board and Professional Development Team in conjunction with Asset Skills and awarding organisations
	3.1	Encourage employers to make the most of CPD opportunities	SKIPP Board and Professional Development Team
	3.2	Continue to develop, promote and review qualifications specifically aimed at parking supervisors and managers	SKIPP Board and Professional Development Team in conjunction with Asset Skills and awarding organisations
	5.1	Continue to bring together Super Special Interest Groups to help promote new technologies and associated business opportunities	Communications Team
	5.2	Continue to promote new technologies within Parking News	Communications Team
	5.3	Continue to encourage manufacturers and suppliers to sponsor events and conferences	Communications Team

<p>LONG TERM</p> <p>Strategic planning and development work</p> <p><i>Up to 2015/2016</i></p>	1.3	<p>Develop and implement BPA member recruitment strategy</p> <p><i>Takes into account possible future changes to BPA and IPP structures</i></p>	Communications Team
	1.6	<p>Continue to lobby ONS for a SIC code for Parking</p>	Asset Skills supported by BPA Senior Management Team
	1.7	<p>Replicate LMI and skills research to maintain up-to-date knowledge</p>	Professional Development Team in conjunction with Asset Skills
	6.3-6.6	<p>Develop marketing and Communications Team strategy for the IPP, including researching needs of members, increased networking events and tailoring of IPP benefits to individuals in different types of job roles</p> <p><i>Takes into account possible future changes to BPA and IPP structures</i></p>	SKIPP Board and Futures Group

Appendix 1. Employer Survey – Additional cross-tabulations

This section cross-tabulates all the main survey questions by type of enforcement operation (public land; private land; both; no involvement in enforcement).

Table A1: Principal parking activity undertaken

	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
Design and build of parking facilities	2.5%	-	-	3.1%	9.3%
Manufacture and supply of parking equipment & systems	8.1%	-	-	3.1%	34.9%
Engineering and maintenance	3.0%	-	-	3.1%	11.6%
Managing and operating parking facilities (incl. call centres)	21.8%	27.0%	27.1%	18.8%	9.3%
Parking enforcement (issuing notices/vehicle immobilisation/removal)	48.7%	63.5%	62.5%	56.3%	2.3%
Parking support services (handling enquiries/progressing cases/processing payments)	3.6%	2.7%	4.2%	3.1%	4.7%
Debt recovery services (parking notices)	3.6%	2.7%	2.1%	3.1%	7.0%
Fraud investigation	-	-	-	-	-
Consultancy services (specialist parking advice)	3.0%	2.7%	-	3.1%	7.0%
Recruitment services (parking personnel)	1.0%	-	-	-	4.7%
Learning and development provision	0.5%	-	-	3.1%	-
Other:	4.1%	1.4%	4.2%	3.1%	9.3%

% respondents

Base: 199 respondents

Table A2: Mix of parking activities undertaken

	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
Design and build of parking facilities	8.1%	8.1%	5.3%	8.9%	11.1%
Manufacture and supply of parking equipment & systems	2.9%	0.2%	2.0%	1.1%	20.0%
Engineering and maintenance	11.2%	11.8%	5.3%	11.7%	17.8%
Managing and operating parking facilities (incl. call centres)	15.8%	15.9%	21.3%	15.1%	7.8%
Parking enforcement (issuing notices/vehicle immobilisation/removal)	17.0%	16.9%	28.0%	15.6%	2.2%
Parking support services (handling enquiries/progressing cases/processing payments)	14.9%	16.2%	16.0%	14.0%	8.9%
Debt recovery services (parking notices)	7.7%	7.6%	9.3%	8.4%	4.4%
Fraud investigation	2.8%	2.5%	2.7%	5.0%	-
Consultancy services (specialist parking advice)	4.5%	1.5%	5.3%	5.6%	14.4%
Recruitment services (parking personnel)	6.4%	9.6%	-	6.1%	3.3%
Learning and development provision	7.3%	9.1%	3.3%	7.8%	4.4%
Other:	1.3%	0.7%	1.3%	0.6%	5.6%

% total responses

Base: 828 responses from 199 respondents

Table A3: Average no. directly employed staff per organisation

	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
How many staff (of the total in Q9) are directly employed	75.03	37.28	22.91	314.9	21.51

Base: 194 respondents

Table A4: Average no. directly employed staff in different parking occupations

	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
Strategic Managers/Directors	1.0	0.6	0.9	1.8	1.4
Parking Managers	1.0	1.0	0.9	2.2	0.1
Contract Managers	1.0	0.2	0.0	5.3	0.5
Notice Processing/Debt Recovery Managers	0.5	0.8	0.4	0.7	0.0
Car Park Managers	0.2	0.5	0.2	0.1	0.0
General business managers (inc. HR/Sales/Finance/Marketing)	1.0	0.8	0.7	0.6	1.9
All other managerial roles	1.0	0.5	0.3	3.7	0.6
Contract Compliance Officers	0.1	0.2	0.0	0.2	0.0
Notice Processing Officers	5.2	8.3	0.2	11.7	0.6
PA/TA/CEO Supervisors*	5.4	2.7	7.2	16.3	0.2#
All other supervisory roles	0.8	1.2	0.6	0.8	0.4#
PA/TA/CEOs*	37.4	16.2	13.5	176.4	1.3#
Vehicle Immobilisation and removal Officers	2.4	0.6	0.2	13.5	0.2
CCTV Enforcement Officers	0.9	0.4	0.4	3.7	0.2
All other customer facing roles	2.6	0.2	0.1	0.9	11.1
All other administrative roles	4.4	6.5	1.2	5.0	3.9
Other technical	1.9	0.6	0.0	2.7	5.8
Other	3.0	0.4	0.7	11.0	4.5

*Parking Attendant (Scotland)/Traffic Attendant (NI)/Civil Enforcement Officer (England & Wales)

Base: 195 respondents

Figures denoted with a '#' should be treated with caution

Table A5: Variations in total staff within last 12 months

	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
Higher	19.7%	19.2%	27.7%	15.6%	14.6%
Lower	20.7%	27.4%	6.4%	31.3%	17.1%
The same	59.6%	53.4%	66.0%	53.1%	68.3%

% respondents

Base: 194 respondents

Table A6: Perceptions on staff turnover within last 12 months

	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
Very high	0.5%	-	-	3.1%	-
High	3.6%	1.4%	2.1%	6.3%	7.3%
Neither high nor low	12.9%	13.5%	14.9%	12.5%	9.8%
Low	17.0%	20.3%	17.0%	12.5%	14.6%
Very low	24.7%	31.1%	21.3%	25.0%	17.1%
None existent	41.2%	33.8%	44.7%	40.6%	51.2%
Don't know	-	-	-	-	-

% respondents

Base: 195 respondents

Table A7: Gender

	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
Male	69.1	64.3	76.1	64.6	73.2
Female	30.8	35.5	23.9	35.4	26.8

average % workforce
Base: 195 respondents

Table A8: Full time/part time

	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
Full-time	85.8	84.8	81.0	87.8	91.4
Part-time	14.3	15.2	19.0	12.2	8.9

average % workforce
Base: 194 respondents

Table A9: Age bands

	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
16-17	0.1	0.0	0.3	0.0	0.0
18-24	5.5	4.5	6.2	4.0	7.5
25-29	12.9	12.7	12.7	8.3	16.4
30-39	26.4	26.3	31.9	26.4	20.7
40-49	25.7	25.3	19.2	27.7	32.0
50-59	21.2	23.2	22.1	22.7	16.1
60-64	5.8	6.0	4.8	6.5	5.9
65+	2.5	2.1	3.1	4.5	1.2

average % workforce

Base: 194 respondents

Table A10: Ethnic Groups

	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
White	87.5	89.6	82.7	89.0	88.0
Mixed	1.8	1.7	2.8	1.0	1.3
Asian or Asian British	4.6	2.8	7.8	3.4	5.4
Black or Black British	4.2	4.4	5.5	4.5	2.4
Chinese	0.3	0.1	0.3	0.7	0.2
Other	1.9	1.9	1.2	1.8	2.7

average % workforce

Base: 188 respondents

Table A11: Migrant workers from the EU

All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
2.2	2.6	2.0	0.8	2.5

average % workforce

Base: 187 respondents

Table A12: Migrant workers from outside the EU

All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
1.5	0.9	1.4	1.3	2.8

average % workforce

Base: 187 respondents

Table A13: Highest qualification level held

	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
Levels 5 and above (postgraduate)	5.2	1.9	2.1	3.4	15.3
Level 4 (degree equiv)	13.5	9.1	12.7	15.0	20.4
Level 3 (A-level equiv)	20.4	14.9	23.8	16.0	28.7
Level 2 (GCSE/O level A-C equiv)	39.0	42.4	43.2	45.8	23.9
Level 1 (GCSE/O level D-G equiv)	16.9	27.0	10.1	16.6	8.5
No qualifications held	5.6	5.9	8.6	3.6	3.3

average % workforce

Base: 172 respondents

Table A14: Impact of future issues on meeting skills needs

	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
Need for greater investment in learning and development	20.9%	23.1%	16.7%	19.7%	21.3%
Need for better structured learning and development	19.1%	22.4%	15.3%	18.0%	16.4%
Need for more job-specific learning and development	24.9%	27.6%	22.2%	26.2%	19.7%
Need for more varied and flexible learning tools, such as e-learning	17.4%	17.3%	8.3%	23.0%	23.0%
No change	14.9%	9.0%	31.9%	9.8%	14.8%
Other	2.9%	0.6%	5.6%	3.3%	4.9%

% total responses

Base: 353 responses from 189 respondents

Table A15: Rating of parking sector improvements in the last five years

Factor	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
Public perceptions of the parking sector	4.6	4.7	4.0	4.5	5.0
Workforce demand for L&D	5.1	5.2	4.8	5.3	5.2
Opportunities for L&D	5.3	5.4	4.6	5.8	5.7
Quals and learning relevant/fit for purpose	5.0	5.7	4.1	5.4	4.1
Consistency in standards and competence	5.4	5.6	5.2	5.5	5.4
Opportunities for career progression	4.2	4.2	4.1	4.2	4.5
Overall job satisfaction	5.9	5.4	6.1	6.9	5.7
Overall professionalism of the sector	6.7	6.9	6.6	6.9	6.3

Average improvement rating by employers where 1 = no improvement and 10 = significant improvement

Range of ratings given: 1 to 10

Base: 167-188 respondents (not all respondents rated each factor)

Table A16: Occupations hard to recruit for because of a shortage of skills

	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
Strategic Managers/Directors	1.6%	-	-	11.1%	-
Parking Managers	6.5%	4.0%	13.3%	11.1%	-
Contract Managers	3.2%	4.0%	-	11.1%	-
Notice Processing/Debt Recovery Managers	1.6%	4.0%	-	-	-
Car Park Managers	8.1%	4.0%	13.3%	22.2%	-
General business managers (inc. HR/Sales/Finance/Marketing)	3.2%	-	-	-	15.4%
All other managerial roles	0.0%	-	-	-	-
Contract Compliance Officers	0.0%	-	-	-	-
Notice Processing Officers	4.8%	8.0%	-	11.1%	-
PA/TA/CEO Supervisors	3.2%	-	-	11.1%	7.7%
All other supervisory roles	1.6%	-	6.7%	-	-
PA/TA/CEOs	21.0%	44.0%	6.7%	-	7.7%
Vehicle Immobilisation and removal Officers	4.8%	4.0%	13.3%	-	-
Civil Enforcement Officers	0.0%	-	-	-	-
CCTV Enforcement Officers	0.0%	-	-	-	-
All other customer facing roles	1.6%	-	-	-	7.7%
All other administrative roles	3.2%	4.0%	6.7%	-	-
Other technical	16.1%	12.0%	-	11.1%	46.2%
Other:	19.4%	12.0%	40.0%	11.1%	15.4%

% total responses

Base: 63 responses from 51 respondents

Table A17: Skills lacking within the existing workforce

	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
Verbal communication	13.9%	10.0%	9.5%	17.4%	23.8%
Written communication	17.4%	20.0%	9.5%	17.4%	19.0%
Numeracy	6.1%	8.0%	4.8%	8.7%	-
English for speakers of other languages	4.3%	8.0%	4.8%	-	-
IT - technical support	6.1%	4.0%	14.3%	4.3%	4.8%
IT - general skills	13.0%	16.0%	19.0%	-	14.3%
Customer service	6.1%	4.0%	4.8%	8.7%	9.5%
Conflict management	6.1%	6.0%	4.8%	8.7%	4.8%
Knowledge of the parking sector, including legislation	13.0%	12.0%	19.0%	13.0%	9.5%
Health and Safety awareness	2.6%	2.0%	4.8%	4.3%	-
Management and leadership	8.7%	10.0%	-	17.4%	4.8%
Don't know	0.0%	-	-	-	-
Other	2.6%	-	4.8%	-	9.5%

% total responses

Base: 120 responses from 59 respondents

Table A18: Approaches used for accessing learning and development in the last two years

	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
On-the-job learning (including job shadowing)	24.5%	22.9%	33.6%	19.4%	25.0%
Courses or seminars run by your own staff	16.6%	15.9%	19.2%	15.8%	16.9%
Self-learning (using books, manuals, CD-Roms or other materials)	14.8%	12.7%	19.2%	14.4%	16.2%
College courses	6.3%	5.1%	4.8%	9.4%	7.4%
Private learning provider courses	13.3%	16.2%	11.2%	12.9%	8.8%
University courses	2.1%	1.3%	1.6%	2.9%	3.7%
Professional/trade body events	10.5%	12.4%	4.0%	10.8%	11.8%
Externally run conferences	10.1%	11.4%	5.6%	11.5%	9.6%
Don't know	0.4%	0.3%	0.8%	0.7%	-
Other	1.4%	1.9%	-	2.2%	0.7%

% total responses

Base: 720 responses from 190 respondents

Table A19: Any issues accessing qualifications, learning and development in the last five years

	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
Yes	22.4%	28.4%	14.6%	35.5%	11.6%
No	77.6%	71.6%	85.4%	64.5%	88.4%

% respondents

Base: 197 employers

Table A20: Barriers preventing access to qualifications in the last five years

	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
No local providers	7.3%	7.3%	5.6%	4.3%	14.3%
Local providers are not suitable	3.1%	-	5.6%	4.3%	7.1%
Course dates and times not convenient	6.3%	4.9%	5.6%	4.3%	14.3%
Learning and qualifications are not relevant to business needs	13.5%	12.2%	16.7%	13.0%	14.3%
Difficult to get information about courses	4.2%	4.9%	11.1%	-	-
Too expensive	31.3%	31.7%	22.2%	39.1%	28.6%
Too time-consuming	13.5%	14.6%	11.1%	13.0%	14.3%
Previous negative experiences of learning	2.1%	-	5.6%	4.3%	-
Staff reluctant to be trained	1.0%	-	-	4.3%	-
Staff fully proficient	3.1%	4.9%	5.6%	-	-
Don't know	1.0%	-	-	4.3%	-
Other	13.5%	19.5%	11.1%	8.7%	7.1%

% total responses

Base: 98 responses from 62 respondents

Table A21: Recognition of the IPP

	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
Pay for staff membership in full and on-going	21.3%	30.7%	14.6%	19.4%	14.0%
Pay for staff membership for a limited period	1.0%	0.0%	0.0%	3.2%	2.3%
Encourage staff to join at own expense	11.7%	16.0%	8.3%	16.1%	4.7%
Currently don't recognise the IPP	66.0%	53.3%	77.1%	61.3%	79.1%

% respondents

Base: 198 respondents

Table A22: Rating of services offered by the IPP

	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
Acquiring Member or Fellow Status	5.8	5.3	7.3	5.7	6.4
Recognition of qualifications and experience	7.0	6.9	7.4	7.1	7.2
Networking opportunities	6.5	6.7	5.6	6.7	6.6
CPD – including support and advice	6.6	6.9	6.2	6.2	6.8
Updates in sector news and legislation	7.4	7.6	7.4	7.5	6.4
Careers information - to assist with progression	5.9	5.9	6.6	5.5	5.8
Access to the member-only section of the website	5.9	6.0	6.0	5.4	6.1
Overall professionalism of the sector	7.4	7.4	7.3	7.5	7.6

Value rating by employers where 1 = not at all valuable and 10 = extremely valuable

Base: 68 respondents (that recognise the IPP)

Table A23: Further information about the IPP?

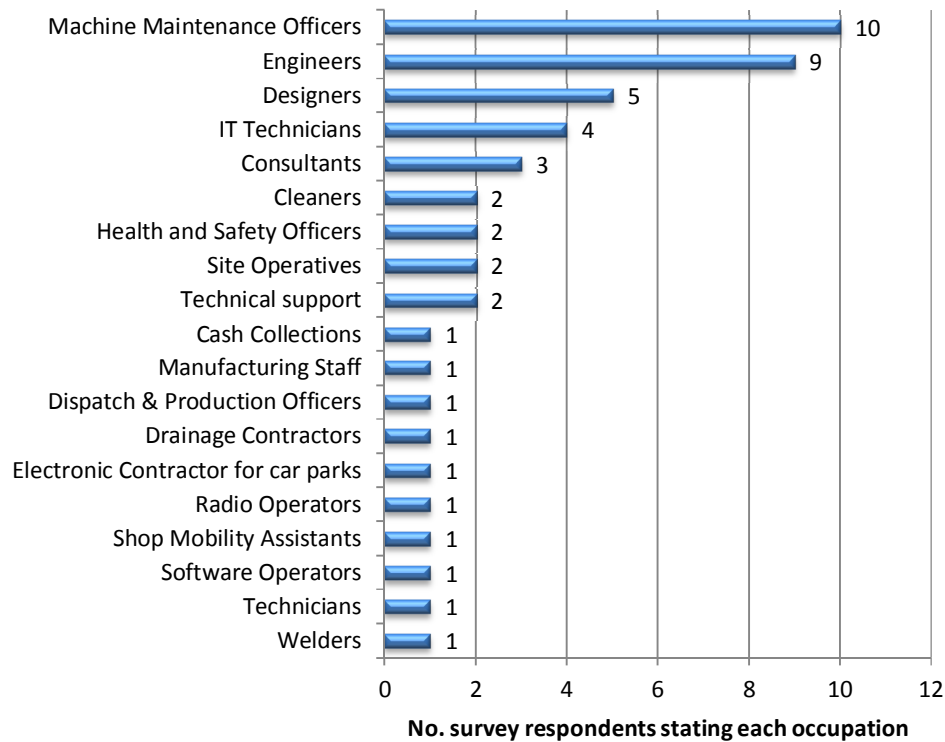
	All	Enforcement on public land and highways only	Enforcement on private land only	Both	No involvement in enforcement
Yes	41.9%	38.6%	50.0%	44.8%	36.4%
No	58.1%	61.4%	50.0%	55.2%	63.6%

% respondents

Base: 192 respondents

Appendix 2. Occupations classified as 'Other'

The chart below lists occupations cited by parking sector employers as 'Other' in relation to total staff employed across different occupational groups. The chart refers to the number of survey respondents who stated they employ staff in each occupation.



Appendix 3. Exemplar skills and knowledge matrix

The following exemplar skills and knowledge matrix relates to recommendation 2.2 (see section 8.2). The matrix below could be adapted for the parking sector to show the range of knowledge and skills considered to be a) required; b) optional/recommended and c) not required for a range of specific job roles. The job roles could also be colour coded according to each Level of the QCF at which relevant professional development should be attained, with a list of qualifications ‘solutions’ appropriate to each job role.

A matrix in this style will enable individuals to first identify the knowledge and skills they require for their job role, followed by an appropriate professional development solution– as opposed to simply providing a list of qualifications without first highlighting the requirements of the role.

	Reliability and PdM Professionals	Lubrication Technicians	Laboratory Oil Analysts	Mechanics and Craftsmen	Operators	General Managers and Supervisors
Lube Storage and Inspection	■	▲	■	■	■	●
Lubrication Fundamentals	▲	▲	■	▲	■	■
Contamination Control	▲	▲	■	▲	■	■
Sampling Techniques	▲	▲	▲	■	■	●
Lubrication Health Monitoring and Analysis	▲	■	▲	■	■	■
Contamination Monitoring	▲	■	▲	■	■	■
Wear Debris Detection and Analysis	▲	■	▲	■	■	■
Instrument Use, Care and Calibration	■	●	▲	●	●	●
Laboratory QC and Management	■	●	▲	●	●	●
Lube Team Management	■	▲	●	●	●	▲
Performance Trending and Financial Benefits	▲	■	■	●	▲	▲

Legend: ▲ Required ■ Optional ● Not Required