Safer Parking Report 2017
EXECUTIVE SUMMARY

Executive Summary

This report contains the key findings from research into the attitudes and perceptions of car park operators and motorists towards the Safer Parking Scheme and Park Mark. During October to December 2017 phone interviews were conducted with 108 operators who are members of the Safer Parking Scheme. At the same time face-to-face interviews were conducted with 1,481 motorists in 24 car parks holding the Park Mark. Responses are representative of the scheme membership by region and market sector.

Award Holder Satisfaction

Overall, operators are highly satisfied with the Safer Parking Scheme and intend to continue their membership.

Achieving a quality standard recognised within the parking industry and accreditation by police officers are the main reasons operators join the Safer Parking Scheme and apply for Park Mark awards. Improving security and improving customer services were also important reasons for joining.

Membership of the scheme has not had an impact on criminal activity and anti-social behaviour in the majority of car parks as crime was already low in those that have been included in the scheme.

Over three quarters of operators agree that their investment in the scheme and Park Mark is good value for money, with almost all saying their organisation will be continuing its membership.

Most operators are highly satisfied with the contact they have with their area manager, police assessor and the membership team administering the scheme. In comparison with the other regions, there is a noticeable level of dissatisfaction with the BPA in one region; this is being investigated to understand and respond to the root causes.

Operators display Park Mark branding in their parking facilities and promote their membership of the Safer Parking Scheme in a variety of ways. Most popular are on their website, and with posters, stickers and metal signs in their car parks. Parking teams are responsible for publicising their organisation’s scheme membership in half of operators; in the remainder marketing/PR or sales teams have this responsibility.

The majority of operators say customer comments and feedback are unchanged since they gained the Park Mark, indicating customers were already satisfied with the high standard of facilities and features in these car parks.

Motorist Satisfaction

Motorists using Park Mark awarded facilities are highly satisfied with their car park and with the services provided by operators.

People are loyal to their favourite car park and use it when they are in the locality, whether this is daily, weekly, fortnightly, monthly, or less often. Of those who said they were not in their favourite place, the majority did not have a preference in the area.

Location near to their destination and ease of navigation were the main reasons people chose their car park. Park Mark features, such as lighting, cleanliness, security and safety, were of lesser importance.

However, when they were asked to rate the features of their car park, lighting, cleanliness, surveillance and safety scored highly – indicating users do value the assessment criteria used in the Safer Parking Scheme.

Awareness of the Safer Parking Scheme and Park Mark remain low, but there is significant variation by region and market sector across the United Kingdom. The correlation between brand recall and signage is evident in the Park & Ride sector for example, where award holders were more likely to say they do not display Park Mark branding and brand recall by motorists was lowest. However, once motorists were aware the car park had Park Mark, they said they were much more likely to use an awarded car park in the future. Small numbers of motorists say that they have interacted with Park Mark via social media including Facebook, Twitter and YouTube. The more established online channels have greater interaction, indicating that interaction will increase in the future as motorists become accustomed to the channels.
Changes Over Time

Operators are more satisfied with the Safer Parking Scheme and more likely to continue their membership, while motorists more highly value the facilities in their Park Mark-awarded car parks.

When comparing responses for 2017 with the previous research in 2014, there are slight changes in reasons operators join the Safer Parking Scheme. Police-accreditation and industry recognition remain equally important, while improving customer service, improving publicity and gaining more customers are dropping in importance as reasons for joining the scheme.

The percentage of operators saying they have seen an increase in criminal activity in their car parks has more than halved, from 51 per cent in 2014 to 23 per cent in 2017.

Despite this, there have been slight dips in the ratios of operators saying membership of the scheme is good value for money for their organisation and saying they are satisfied with area manager contact. In contrast, satisfaction with police assessor contact has risen noticeably.

Also noticeable is the acceptance of their responsibility for publicising their scheme membership. In 2014 the majority of operators believed the BPA was primarily responsible for publicity, now the majority say internal teams are responsible.

Posters, stickers and metal signs in parking facilities continue to be how operators display their Park Mark awards, with their websites becoming increasingly important.

Overall satisfaction with the way the Safer Parking Scheme is run and intention to continue membership both remain very high over time.

In 2017, motorists were more likely to be first time or occasional users and less likely to be regular users of Park Mark car parks. However, they are more positive about the car parks, rating them more highly on the scheme criteria – cleanliness, lighting, surveillance, management and safety – as well as other criteria such as location, tariffs, spaces and payment methods.

Awareness of Park Mark remains low, with similarly high numbers saying they are likely to use the car park in the future now they know it has achieved the award.
SAFER PARKING REPORT 2017

SECTION ONE: OUR REMIT

The British Parking Association commissioned Sweeney Communications to research attitudes and perceptions among car park operators who are members of the Safer Parking Scheme and among users of parking facilities that have attained the Park Mark.

This research was carried out between October to December 2017 to evaluate levels of knowledge, perceptions and behaviours of Park Mark award holders and the parking public across Scotland, England and Wales.

1.1 BPA’s Desired Results

The BPA asked for a programme of research to evaluate levels of knowledge, perceptions and behaviours of Park Mark award holders and of drivers who use their car parks.

The research will be conducted during the autumn 2017 across England, Scotland and Wales.

Outputs and recommendations will be used to shape public relations activities and improve its service to members and motorists.

Research was previously conducted in 2014.

1.2 Research Objectives

This research aims to develop understanding about:

- Award holders’ expectations and perceptions of the Park Mark scheme;
- Award holders’ perceptions of Park Mark publicity activities;
- Award holders’ business objectives, marketing strategies and publicity opportunities;
- The criteria UK drivers use when choosing where to park their vehicles;
- Awareness of the scheme and Park Mark among the general public;

1.3 Target Audiences

Key audiences for the research are:

- Owners and operators of private and public car parks with the Park Mark award.
- Drivers who park in Park Mark-awarded car parks.
SECTION TWO: VIEWS OF PARK MARK AWARD HOLDERS

2.1 Key Findings

Overall, operators are highly satisfied with the Safer Parking Scheme and intend to continue their membership.

Respondents understand why their organisation has joined the scheme and gone through the accreditation process to gain a Park Mark award. They recognise the value of being part of an industry-recognised scheme that accredits high standards of personal and vehicle safety. They also value assessments carried out by independent police assessors. Joining the scheme and making the investment required to gain the Park Mark are a good investment for their organisation, respondents believe.

The majority say customer feedback and comments are unchanged since they joined the scheme. However, many car park users are not noticing Park Mark signage and therefore any potential correlation between safer parking scheme membership and customer satisfaction measurement is potentially being missed. However, scheme members do not survey their customers and therefore satisfaction rates have never been measured for direct comparison. Despite this, our findings reveal customer ratings for the scheme criteria have risen since we visited in 2013/14.

Further, respondents say joining the Safer Parking Scheme and achieving the Park Mark has not had an impact on criminal activity and anti-social behaviour in the majority of car parks because crime was already low in those they have included in the scheme.

Reasons for joining the scheme vary by region and by market sector; these are detailed in section 3.2.

Scheme members highly value the personal contact they have with police assessors and area managers: highest satisfaction is with police assessors. Most have the level of contact they want with BPA area managers, scheme administrators and police assessors. Dissatisfaction with area manager contact in Midlands & Oxfordshire region (at 23%) and with police assessors in the South East (at 12.5%) should be investigated and resolved.

Operators recognise they are responsible for publicising their membership of the Safer Parking Scheme and Park Mark awards locally and to customers. The majority display the Park Mark brand in those car parks that have achieved the award; indicating they value holding the Park Mark and want car park users to know they have achieved the standards required for cleanliness, lighting, security and management.

Parking services teams are responsible for publicising their scheme membership in over half of operators. Marketing and PR teams have this responsibility in just over a quarter of operators, and sales teams are responsible in a small number of organisations.

Operators are satisfied with how the Safer Parking Scheme is run and the vast majority do not believe improvements are needed. They say the BPA is doing a good job of administering the scheme, managing assessments, support around assessments and raising awareness with the driving public.

This high satisfaction with the scheme means that virtually all operators are intending to continue their membership and 82% are willing to recommend the Safer Parking Scheme and Park Mark to others.
BPA Regions:

Region 1: North East (Cleveland, Co Durham, Humberside, North Lincs, Northumberland, South Yorks, West Yorks, Tyne & Wear)

Region 2: North West (Derbyshire, Cheshire, Greater Manchester, Lancashire, Merseyside, Tameside, North Wales)

Region 3: Midlands & Oxfordshire (Berks, Leics, Oxon, Shropshire, Staffs, Warks, West Mids, Worcs)

Region 4: South (SW London, Surrey, Sussex & Hants)

Region 5: South West (Avon, Cornwall, Devon, Dorset, Glos, Somerset, Wilts & South Wales)

Region 6: Scotland (plus Northern Ireland & Cumbria)

Region 7: South East (SE London, Kent & Essex)

Region 8: East Anglia (Beds, Cambs, Lincs, Norfolk, Northants, Notts, Suffolk)

Region 9: North London, Herts, & Bucks
2.2 Award Holders

Why join the Safer Parking Scheme

Achieving a quality standard recognised within the parking industry and accreditation by police officers are the main reasons operators join the scheme and apply for Park Mark awards. When asked why their organisation had joined the Safer Parking Scheme, 91 percent said that it was to gain a police-accredited award and 90 percent said to gain an industry-recognised award.

The second most important reasons were improving security and customer services according to 75% of respondents, which was followed by attracting customers and improving publicity.

Competing locally with other car park operators was the least important factor in their organisation’s decision to join the scheme; just 45 percent said that this was important.

Improving security was a very important reason for joining the scheme for a minority of respondents in each region, except in Scotland where three-quarters said that it was very important.

Attracting more customers and competing locally were very important joining reasons for a minority of respondents in most of the regions. Again, Scotland along with South London, Surrey & Hants, were the exceptions. In each of these, more than half of respondents said attracting more customers was a very important reason for joining.

Police accreditation was also very important to three-quarters of respondents in five sectors; the market sectors are not the same as those for industry recognition.

Improving security was considered as very important to operators in the airports sector, as was attracting more customers.

Customer service was viewed as very important to operators in the airports, leisure and park & ride sectors.

Improving publicity was very important to more than two-thirds of respondents in airports.

The education sector is an anomaly; each of the joining criteria was ranked as very important by a minority of respondents. This may be because education car parks are provided for staff and students and are not open to the public.
2.2.2 Reductions in Criminal Activity & Anti-social Behaviour

When asked if achieving the Park Mark award had reduced criminal activity and anti-social behaviour in their car parks, 36 percent of respondents said these had reduced, 35 percent said crime remained unchanged, and 29 percent said that crime had not been an issue in the car parks when they achieved the Park Mark.

Respondents were most likely to notice significant improvements in criminal activity after they joined the scheme in the North West & North Wales (15%), North London, Herts & Bucks (11%) and in the education (33%), rail station (14%) and airport (11%) categories.

Respondents in South West & Wales (67%) and North London, Herts & Bucks (56%) were most likely to say crime was not an issue before they joined the scheme.

Over half of respondents in Southern (54%) said that criminal activity and anti-social behaviour was unchanged in their car parks.

2.2.3 Increases in Criminal Activity

Overall, 70 percent of respondents said there had been no increase in criminal activity in their car parks during the previous three years.
2.2.4 Investment Required to Maintain Accreditation

Investment is Good Value for Money

77 percent agreed this was good value for money for their organisation, just 7 percent felt the investment was poor value. Respondents were most likely to strongly agree in the North West & North Wales (69%), Southern (61%) and in the airport (67%), leisure (82%) and town centre (67%) sectors.

They were most likely to disagree in the Midlands & Oxfordshire (31%) and South West & Wales (17%) and in the education sector (22%).

2.2.5 Satisfaction with Contact

2.2.5.1 Contact with BPA Area Manager

Seventy nine percent of respondents said that they were satisfied or very satisfied with the level of contact with area managers. Seven percent said that they were dissatisfied or very dissatisfied.

Highest satisfaction was in North West & North Wales (92%), East Anglia & East Midlands (93%) and stations (100%).

Highest dissatisfaction was in Midlands & Oxfordshire (23%), airports (22%), surface rural (33%) and underground (20%).
2.2.5.2 Contact with Safer Parking Scheme Administrators

Satisfaction with Safer Parking Scheme Administrator Contact

Sixty four percent of respondents were satisfied or very satisfied with their contact with scheme administrators. Just five percent were dissatisfied or very dissatisfied.

Satisfaction was highest in North West & North Wales (85%), Southern (85%), East Anglia & East Midlands (87%), North London, Herts & Bucks (100%), hospitals (89%) and stations (86%).

Dissatisfaction was highest in Scotland (17%), and underground (20%).

2.2.5.3 Contact with the Assessor

Satisfaction with Police Assessor Contact

Highest satisfaction with police assessor contact was in the South West (100% very satisfied or satisfied) and in the airport (100%) and station (100%) market sectors.

Satisfaction with assessor contact was also high across the other regions. More than 80 percent said they were satisfied or very satisfied in Midlands & Oxfordshire, South East, East Anglia & East Midlands and North London, Herts & Bucks.

Respondents were most likely to say they were dissatisfied with police assessor contact in the South East (12%); and in education (11%), park & ride (11%), and underground (20%).
2.3 Publicising the Scheme

2.3.1 Displaying Park Mark Branding

Eighty-six percent of respondents said that their organisation displays Park Mark branding in its parking facilities, and just five percent said that their organisation did not do so.

All respondents in the South East, airport, public and station sectors said that their organisation displays the Park Mark in their car parks.

More than 90 percent do so in North West & North Wales, South West & Wales and leisure facilities.

Highest numbers of respondents who said their organisation did not display Park Mark branding in its car parks were in North London (11%), as well as the hospitals (11%) and park & ride (11%) sectors.

Highest numbers of respondents who said they did not know if their organisation displays the Park Mark in its car parks were in the North East (15%) and education (11%).
2.3.2 Promoting Park Mark Awards

Operators promote their membership of the Safer Parking Scheme and Park Mark awards in a variety of ways. Most popular are on their website and with posters in their parking facilities.

Stickers on payment machines and metal signs at vehicle and pedestrian entrances, lift lobbies and walkways as well as other strategic locations are also popular with almost half of operators.

The backs of parking tickets are the least likely place for Park Mark information.

Operators in the South West & Wales, South East, East Anglia & East Midlands and North London, Herts & Bucks used the greatest variety of publicity methods (eight); while those in Midlands & Oxfordshire used the fewest methods (five).

Highlights include:
- South West & Wales had high numbers of operators using each publicity method except posters
- North West & North Wales operators were high poster users
- Midlands & Oxfordshire were high users of stickers and the website
- East Anglia & East Midlands operators were high users of posters and stickers
- North London, Herts & Bucks operators were significant users of the website and stationery.

Respondents in the leisure sector were most likely to publicise their Park Mark awards and use a wide variety of publicity methods. In comparison, respondents in the park & ride sector were least likely to publicise Park Mark and used the least range of publicity methods.
2.3.3 Responsibility for Publicity

In 55 percent of organisations surveyed, the parking services teams are responsible for publicising the Safer Parking Scheme and Park Mark to users. Marketing and PR departments are responsible in 28 percent of organisations and the sales team in six percent.

2.4 Customer Satisfaction

2.4.1 Changes in Customer Comments & Feedback

The majority of respondents (82%) said customer comments and feedback were unchanged since they gained the Park Mark award for their car parks. Just 16 percent said customers were more positive and less than one percent said that they had got worse.

Respondents were most likely to say comments and feedback had improved in the North West & North Wales (23%), East Anglia & East Midlands (20%) and North London, Herts & Bucks (22%). Respondents said that comments had got worse in South West & Wales (8%).
Respondents in all market sectors apart from hospital reported improved customer comments since joining the Safer Parking Scheme.

**2.5 Satisfaction with the Scheme**

**2.5.1 Park Mark Services**

When asked how much they valued the range of services provided by the Safer Parking Scheme, members were most likely to say they highly valued Park Mark accreditation (86%) and assessment by accredited police officers (96%). Consultation services from BPA area managers were valued by just over half of respondents. Least valued are the newer digital channels including Facebook and YouTube videos.
2.5.2 Other Benefits for Members

When asked what other benefits they would like to see as a member of the Safer Parking Scheme, just two percent of respondents made suggestions. In total they made 16 different suggestions. Most frequently mentioned were:

- More publicity (10 people)
- Cheaper membership rates or freebies (3 people)
- Police officer to come with the assessor, or to reinstate contact with the police (2 people)
- More advice on insurance claims and on preparing for the annual assessment (2 people)

All the other suggestions were mentioned by one person each, they were:

- Better communication
- Support
- Consistency
- Sector standards
- Fresh ideas
- Higher profile for the scheme
- Benchmarking exercise
- Provide promotional signage
- Quality rating
- Accreditation
- Increased customer awareness

2.5.3 Satisfaction with Administration

Figure 14

Overall, 87 per cent of respondents were positive about how the British Parking Association runs the Safer Parking Scheme. Just two percent said that they were dissatisfied.

Highest satisfaction was in Scotland (100%), East Anglia & East Midlands (93%), North West & North Wales (92%), Southern (92%), South West & Wales (91%), leisure (91%), stations (100%) and town centres (100%).

Highest dissatisfaction was in the North East (8%), Midlands (8%), education (11%) and park and ride (11%).
2.5.4 Continuing Membership

Ninety-seven percent of respondents said their organisation would be continuing its membership. The two people who said their company would not be continuing were in the North East and Midlands & Oxfordshire regions. One respondent in the North West & North Wales did not know if their organisation would be continuing with membership.

2.5.5 Recommending to Others

Eighty three percent of respondents said that they would recommend the Safer Parking Scheme to others. Two percent said they would not do so. They were least likely in the South East (62%) and Midlands & Oxfordshire (69%).

Recommendations were most likely in North London, Herts & Bucks (100%), South West & Wales (100%) and Scotland (92%).
2.5.6 Improvements

When asked to name one thing that would improve the Safer Parking Scheme and Park Mark for them and their organisation, three percent (43 respondents) made a total of 16 suggestions. Most frequently mentioned were:

- More publicity including more national media coverage (19 people)
- Clearer communications (5 people)
- Cheaper scheme membership fees (5 people)
- More policing of the rules and stricter adherence to them so that other car park operators did not lower the scheme’s standards (2 people)

The other improvements were mentioned by one person each, they were:

- Better assessments
- Improve the assessment form so it is more user friendly
- Proactive renewal
- Better auditing and better screening
- Consultation outside the accreditation process
- Communications directed at facility owners
- Consistency
- More contact with BPA staff
- More customer awareness
- An online app
SECTION THREE: VIEWS OF CAR PARK USERS

3.1 Key Findings

Users of Park Mark awarded facilities are highly satisfied with their car park and with the services provided by operators.

Respondents are loyal users of their car parking facility, and park there when they are in the locality whether it is daily, weekly, fortnightly, monthly or less often. Of those who said they were not in their favourite car park, for the majority this was because they did not have a preference in the area.

Location was the number one reason drivers chose their car park, either closeness to their destination, convenience from where they began their journey, or both. Second most important reason was how easy it was to navigate around the car park and find a vacant parking space. Very small numbers of respondents said that other factors influenced their parking choice.

The majority of respondents rated their car park highly for location, management, personal safety, cleanliness, lighting and a safe environment – the criteria on which the Park Mark is awarded. They believe their car park is safe for them, their passengers and vehicle and that they are unlikely to be the victim of crime while using the facility.

Operators are ensuring their parking facilities are clean and graffiti-free, including pedestrian areas, entrances, exits, lift lobbies and stairwells, to the satisfaction of most users. Levels of lighting are adequate, enabling users to see clearly and reducing any dark areas linked to fear of crime. There is sufficient surveillance, via CCTV, staff patrols and open sightlines, to deter criminals and reduce the fear of crime.

A majority of respondents are also satisfied with the number of spaces in their car park, indicating they believe they will easily be able to find a space for their vehicle whenever they wish to park. However, when asked what would improve their car park, the most frequent request was for more spaces. This was mentioned by 16 percent of respondents at 15 of the car parks.

Respondents were also satisfied with tariffs in their car park, suggesting that drivers do expect to pay for parking facilities and believe they are charged a fair rate to use their preferred local car park. Satisfaction with the variety of payment methods on offer was high across the car parks, indicating operators are offering the methods users want.

Awareness of the Safer Parking Scheme and Park Mark remain low across the United Kingdom. However, once they are aware, drivers say they are much more likely to use an accredited car park in the future. Operators who publicise their awards, in theory, should see an increase in repeat and first-time visits to their awarded facilities, which is supported by motorists recalling the Park Mark brand in car parks that used prominent signage.

National publicity via social media is beginning to increase awareness; this is most marked in areas where the bus adverts ran and the body art campaign was filmed. Respondents are interacting with the online car park finder, Facebook pages and videos on You Tube.
3.2 Frequency of Parking

Across all the car parks, frequent and infrequent usage was evenly balanced. Thirty-five per cent of respondents said that they used their car park daily or weekly, compared to thirty-nine per cent who said they parked in theirs monthly or less often.

Fifteen per cent of respondents were using their car park for the first time.
When analysed by market sector variations emerge. Respondents in airports, hospitals, retail and stations were more likely to use their car park infrequently.

Respondents in leisure, park & ride and public were more likely to use their car parks frequently.

Highest frequencies of first time users were in airports and education.

### 3.3 Parking Preferences

![Preferred place to Park by Region](image)
Across all the car parks, 67 percent of respondents said that they were using their preferred place to park. Fourteen percent said they were not in their preferred car parking place and the remaining 18 percent didn’t have a preference in the area.

When these figures were analysed by region and market sector it emerged that respondents were most likely to be in their preferred place to park in the Midlands, South West, Scotland, East Anglia, North London, leisure, public, retail and station car parks.

### 3.4 Factors Influencing Choice

When asked their main reason for choosing the car park, over half of respondents said because it was near their destination. Second most common reason was because the car park was easy to navigate.

Less than five per cent of respondents said that personal safety, safe environment, variety of payment methods, parent/child friendly or disabled friendly was their main reason for choosing their car park that day.

Variations emerge when responses are compared by region and market sector. Location was a much stronger reason in the North East, South West and East Anglia, and in public and town centre car parks.

The type of car park or its primary use may influence respondents; e.g. hospital car parks in different locations produced responses either evenly spread or focused in a couple of areas, whereas all the town centre car parks predominantly focused on location.

Variety of payment methods and safe environment were more important to respondents using retail car parks.
3.5 Car Park Rating

When respondents were asked to rate their car park across a range of facilities more than three-quarters gave a good or very good rating for the Park Mark criteria – cleanliness, lighting, safe environment, management and personal safety. Just under 70% highly rated their car park for CCTV or other surveillance.

Respondents also rated their car park highly for location.

3.6 Park Mark Awareness

Heard of Park Mark by Region

Figure 23

Figure 24
3.7 Park Mark’s Impact on Usage

Figure 25
Awareness of Park Mark remains low but with significant variations by region and market sector; Overall 9% of respondents said they had heard of the Park Mark and knew their car park had reached the standards required to receive the award.

Awareness was highest in the North East, East Anglia, North London, leisure and station car parks.

When comparing recall against award holder responses to marketing, Park Mark recall by the public was strongest where signage was prominent or visits were more frequent.

Figure 26

More likely to Park in Future by Region

Heard of Park Mark by Market Sector
Across the car parks as a whole, 60 percent of respondents said that they are more likely to use their car park in future now they know that it has the Park Mark and is safer for users.

Just 23 percent said that knowing this would not make them more likely to use the car park and 18 per cent said they were not sure if it would make them more likely to park there in the future.

When comparisons are made by region and market sector, we see that respondents in the North East and the education and retail sectors are most likely to say they will use their car park knowing it has the Park Mark.

### 3.8 Publicity Awareness

![Search for Park Mark Online by Region](image_url)

**Figure 28**

The graph shows the search for Park Mark online by region, with Region 1 having the highest search rate.
Overall, three per cent of respondents said that they had searched online for a Park Mark car park and 49 percent said they had not done so. They remainder did not remember doing so.

Respondents were most likely to have searched online for a car park with the Park Mark award in the North East, South East, airport, hospital and leisure sectors.

No respondent in the Midlands or in retail had searched online for a Park Mark car park.

### 3.9 Social Media Views of Park Mark Publicity

Small numbers of respondents said that they had interacted with Park Mark via social media including the Perfect Parker Facebook quiz, Park Mark Facebook page, Park Mark Twitter account and three You Tube videos — The Cost of Vehicle-related Crime, How to Find the Perfect Parking Spot and The Art of Safer Parking.
Regionally, respondents were most likely to interact with Park Mark via Facebook and Twitter in East Anglia; and to watch Park Mark YouTube videos in East Anglia, the North West and North London.

By market sector, respondents were most likely to interact with Park Mark via Facebook and Twitter in the leisure, public, station and town centre sectors, and via YouTube in leisure and town centres.

There is an anomaly in the data, in that four respondents in the airport sector said that they interacted with Park Mark via all the channels used in national publicity.
Park Mark advertisements were displayed on the back of buses in Manchester and Norwich.

### 3.10 Improvements

**Frequently Requested Improvements**

When respondents were asked to name one thing that would improve their car park, 1,091 people (73%) made suggestions. Figure 34 above shows total number.

More spaces was the improvement mentioned most frequently. This was mentioned by 243 (16%) of respondents. Second most frequently mentioned improvement was bigger bays. This was mentioned by 103 (7%) respondents. Reduced tariffs were also mentioned by 103 respondents.

Five percent suggested more payment options like contactless, online, cash and cards (71 people) and improved lighting (71 people).

Four percent suggested more parent child spaces (61 people) and improvements to CCTV and security (60 people).

Three percent (45 people) asked for more disabled spaces.
4.1 Key Findings

Overall, operators’ satisfaction with the Safer Parking Scheme and Park Mark is increasing. Industry recognition and independent police assessment are more highly valued compared to 2014, investment to maintain accreditation is considered good value for money, satisfaction with area manager and police assessor contact has increased and operators are putting more resources into publicising their awards locally. More operators intend to continue their membership and recommend the scheme to others.

Twice as many car park users were surveyed in 2017 compared to 2014. Users rated Park Mark car parks more highly in 2017 than they did in earlier research for the criteria that the Park Mark is awarded on – management, lighting, cleanliness and surveillance – as well as location, availability of spaces, payment methods and tariffs. The percentage of motorists who said they would more likely use a Park Mark facility in the future was fairly static (66% in 2014 and 60% in 2017).

4.2 Qualitative Audit A: Park Mark Award Holders

4.2.1 Park Mark Scheme

4.2.1.1 Why Organisations Joined the Safer Parking Scheme

Reasons for joining Safer Parking Scheme

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<td>Industry-recognised award</td>
<td>100%</td>
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<tr>
<td>Police-accredited award</td>
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<tr>
<td>Improve security</td>
<td>80%</td>
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<tr>
<td>More customers</td>
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<td>Complete locally</td>
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<td>Customer service</td>
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<tr>
<td>Improve publicity</td>
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4.2.1.2 Increase in Criminal Activity

![Reduction in Criminal Activity](image)

Figure 36

Crime saw an increase in 2014, which is in line with national figures. The decline in 2017 is not in line with overall vehicle related crime figures but is in line with statistics for car parks. This indicates the trend for on-street vehicle crime is continuing and that the Safer Parking Scheme is successful in deterring crime and the fear of crime in car parks.

4.2.1.3 Investment Required to Maintain Accreditation

![The investment is good value for money](image)

Figure 37
4.2.1.4 Satisfaction with Contact

![Satisfaction with BPA Contact](image)

**Figure 38**

4.2.2 Publicising the Scheme

4.2.2.1 Displaying Park Mark Branding

![Is Park Mark displayed in parking facilities](image)

**Figure 39**
4.2.2.2 Promoting Park Mark Awards

Operators’ understanding of their responsibilities in promoting their membership of the Safer Parking Scheme and Park Mark awards has changed dramatically in the last three years. In 2014 most believed publicity was the responsibility of the BPA, in 2017 they recognise it is also their responsibility.

Figure 40

4.2.2.2 Promoting Park Mark Awards

Who has responsibility for publicity

Figure 41
4.2.3 Customer Satisfaction

4.2.3.1 Changes in Customer Comments & Feedback

Perception of the value of Park Mark services has dropped slightly over time. Falls in the numbers of operators saying they value accreditation and police assessment are insignificant.

4.2.4 Satisfaction with the Scheme

4.2.4.1 Park Mark Services that are valued

Perception of the value of the Park Mark website, brand manual, marketing and ezine have all fallen. This is despite a significant increase in marketing activities by the BPA public affairs team.
4.2.4.2 Overall Satisfaction

Figure 44
Satisfaction with the way the Safer Parking Scheme is run remains high over time; dissatisfaction is a tiny proportion and continues to fall.

4.2.4.3 Continuing Membership

Figure 45
Numbers of respondents saying they will continue membership has grown from 93% in 2014 to 97% in 2017, while at the same time the numbers planning to cancel their membership had dropped to less than two percent.


### 4.2.4.4 Recommending to Others

In contrast, members’ willingness to recommend the Safer Parking Scheme to others has dropped from 92 percent in 2014 to 82 percent in this latest research.

When the data is analysed by region we see:

All respondents in South West & Wales and North London, Herts & Bucks continue to be willing to recommend the scheme to others.

Willingness to recommend has increased in the Southern region.

Willingness to recommend has dropped significantly in Midlands & Oxfordshire, South East, and East Anglia & East Midlands regions.

### 4.2.4.5 Improvements

When given the opportunity to suggest improvements to the Safer Parking Scheme operators were far less likely to do so; they made 87 suggestions in 2014 compared to 43 in 2017.

 Particularly noticeable are the falls in requests for reduced charges and more publicity.
4.3 Qualitative Audit B: Car Park Users

4.3.1 Frequency

Results indicate drivers are less likely to be regular car park users and more likely to be occasional users; the ratio of first time car park users has also increased.

4.3.2 Parking Preferences

Although the rate is still high, fewer people are parking in their preferred location, likely because they are first time or occasional users and do not yet have a preferred car park.
4.3.3 Car Park Rating

Figure 50
Park Mark car parks scored more highly in 2017 on each of the key features of the Safer Parking Scheme – management, lighting, cleanliness, safe environment and personal safety.

4.3.4 Park Mark Awareness

Figure 51
There is no significant statistical difference in Park Mark awareness (11% awareness amongst 642 car park users in 2014 compared to 9% amongst 1,481 car park users in 2018).
4.3.5 Park Mark’s Impact on Usage

Will use car park knowing it has Park Mark award

![Bar chart showing increase in awareness of Park Mark award from 2014 to 2017](image)

Figure 52
Awareness of Park Mark continues to influence drivers’ choice of where to park.

4.3.6 Online Searches

Searched for a Park Mark car park online

![Bar chart showing increase in online searches from 2014 to 2017](image)

Figure 53
People searching online for a Park Mark car park has increased by ten percent over the last three years, while the number who say they have not done so has dropped significantly.
SECTION FIVE: CONCLUSIONS

High satisfaction with the industry recognition the scheme brings operators, and the police assessment, means these should continue as the primary focuses of publicity designed to attract operators not currently in the scheme and to encourage current members to bring more of their car parks into the scheme.

Reasons for joining vary by region and these variations should also be taken into account in publicity activities. Over half of respondents in each region said the following were important reasons for their organisation joining the Safer Parking Scheme:

- North East: industry recognition
- North West & North Wales: police accreditation, customer service
- Midlands & Oxfordshire: industry recognition, police accreditation
- Southern: industry recognition, police accreditation, customer service
- South West & Wales: industry recognition, police accreditation
- Scotland: security, customer service
- South East: industry recognition, police accreditation, security, more customers, customer service
- East Anglia & East Midlands: industry recognition, police accreditation
- North London, Herts & Bucks: industry recognition, police accreditation

Operators appear not to join the scheme as a way of tackling criminal activity and anti-social behaviour. Instead they use the scheme to demonstrate that their parking facilities are free from such activities and therefore safe for users and their vehicles.

There are some issues in the Midlands & Oxfordshire region where 31 percent disagreed or strongly disagreed that maintaining accreditation is good value for money, 23 percent were dissatisfied or very dissatisfied with area manager contact, and eight percent were very dissatisfied with SPS administrator contact. This region also had the lowest satisfaction with how the Safer Parking Scheme is run.

Operators are meeting the standards of the Safer Parking Scheme and drivers are noticing that facilities have good surveillance, are well managed, clean and well illuminated – however the majority do not realise this is necessarily because of the Park Mark award.

Awareness that a car park is Park Mark awarded remains low amongst car park users, even though operators say that they are promoting their awards within their parking facilities, although in reality this varies across region and type of facility. However, Park Mark recall was strongest where signage was prominent or visits were more frequent.

Potential causes could be:

- Park Mark branding is a minor part of signage in car parks and users are paying more attention to the other information on signs, which fits well with first time or less frequent users who will be concentrating on navigation
- The Park Mark logo has low awareness with the driving public
- Telling users their car park has the Park Mark award does significantly increase the likelihood they will use it in future. Making operators aware of this could potentially increase the chances of them including other car parks in the scheme and increasing publicity of their awards in existing scheme car parks.

National publicity via social media to raise car park users’ awareness of Park Mark should continue and be expanded to reach more car park users with the Park Mark and Safer Parking Scheme messages. The online calls to action to visit the Park Mark website have resulted in marked increases in the numbers of people searching online for the Park Mark brand and people going directly to the site.

Contact should be made with operators of the car parks in Brent Cross, Chichester, Glasgow and Sale, where no respondents were aware the facility had the Park Mark, to see how they publicise their awards and to offer advice on ways to raise awareness in their car parks.
SECTION SIX: OUR APPROACH

6.1 Methodology

Research commenced in October and was conducted by interviewers managed by Roger Withers of TPM Childwise. Data has been analysed, and recommendations given, by Jo Ann Sweeney of Sweeney Communications.

6.1.2 Views of Park Mark Award Holders: Qualitative Audit A

This research was conducted as a telephone survey of a sample of car park operators holding the Park Mark award. The sample was representative by region, market sector and number of spaces. In total 108 award holders participated in the research ensuring that responses are representative of the overall scheme membership.

Twenty-five questions covered the following areas:

- Benefits of the scheme
- How award holders publicise the scheme
- Scheme satisfaction
- Relationship with the BPA and police assessors

### By sector

<table>
<thead>
<tr>
<th>By sector</th>
<th>By region</th>
</tr>
</thead>
<tbody>
<tr>
<td>9 Airport</td>
<td>13</td>
</tr>
<tr>
<td>9 Education</td>
<td>13</td>
</tr>
<tr>
<td>9 Hospital</td>
<td>13</td>
</tr>
<tr>
<td>11 Leisure</td>
<td>13</td>
</tr>
<tr>
<td>9 Park &amp; ride</td>
<td>12</td>
</tr>
<tr>
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<td>7 Station</td>
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<tr>
<td>12 Town Centre</td>
<td>9</td>
</tr>
<tr>
<td>11 Other</td>
<td></td>
</tr>
</tbody>
</table>

- 1=North East
- 2=North West
- 3=Midlands
- 4=Southern
- 5=South West & Wales
- 6=Scotland
- 7=South East London, Essex & Kent
- 8=East Anglia & East Midlands
- 9=North London, Herts & Bucks

6.1.2 Views of Car Park Users: Qualitative Audit B

Short face2face interviews with car park users were conducted in a representative sample of car parks holding the Park Mark award. In total 1,481 car park users in 24 parking facilities participated in the research. Again, this ensured that the responses are representative of the driving public who use Park Mark accredited car parks.

Questions covered the following areas:

- Awareness of the Park Mark scheme
- Awareness of national publicity campaigns
- How often use car park
- Factors that influence choice when parking
- Satisfaction with car park features and services
- Potential improvements
Car parks were segmented by market sector and area. Respondent breakdowns are below:

<table>
<thead>
<tr>
<th>Code</th>
<th>Market Sector</th>
<th>Location</th>
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<tr>
<td>68</td>
<td>Airport, Southern</td>
<td>Gatwick Airport</td>
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<td>116</td>
<td>Education, North East</td>
<td>University of Leeds</td>
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<td>24</td>
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<td>Fountain Park Entertainment Centre, Edinburgh</td>
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<td>58</td>
<td>Public, North East</td>
<td>Mill Road Car Park, Gateshead</td>
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</table>

6.1.3 Publicity Activities 2014-2017

In response to the 2014 Safer Parking Scheme research, the British Parking Association public affairs team and Sweeney Communications developed a range of marketing and publicity collateral, plus a range of creative publicity campaigns.

This 2017 research assessed awareness, perceptions and impact of the following activities on both operators and the driving public, including:

- Printed materials including posters and leaflets
- Online quiz
- Videos on YouTube
- Bus advertising in Manchester and Norwich
- Camouflage body art campaign
- E-newsletter
- Park Mark website and car park finder
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In addition, we are grateful to the following people for their support in arranging interviews with car park users:

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