



BPA

BRITISH PARKING ASSOCIATION

PUBLIC PERCEPTIONS OF PARKING

A research report into the attitudes and behaviour of the parking public



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FOREWORD



The BPA has always been eager to transform perceptions of parking. To provide some balance to the media portrayal of the sector, the association wanted to provide deeper insights that will help our members improve the parking experience, change public attitudes and bust some myths.

That's why we commissioned ICM Unlimited to conduct a groundbreaking piece of research to find out what the public really think about parking. It's pleasing then that it reveals the majority of people recognise and understand why parking needs to be managed and the associated community and societal benefits this brings.

Throughout, the findings paint a broadly positive picture of our sector, with the majority of participants agreeing that parking tickets are effective in deterring drivers from not observing a car park's rules. This is also reflected by the three quarters of those surveyed having not received a ticket during the past three years.

Of course frustrations were cited, but some of the strongest feelings were towards the selfish parking behaviour of others which people felt is not being sufficiently dealt with. This contrasts with the media narrative which often suggests parking management is overzealous.

As well as charting public perceptions of how parking is managed and enforced, there is a wealth of new information provided in this research to guide the sector for years to come, from breaking down the time spent looking for spaces by destination type, to attitudes and take up of different parking technologies.

As I write this foreword, we are moving into a new era due to the Covid-19 pandemic where there are new pressures on parking, as on street bays are repurposed for pedestrians and cyclists. Furthermore as people's mobility needs evolve, these findings provide a baseline for measuring our progress as a sector and an opportunity to use the insights to enable real change. They also provide our members with the evidence to effectively communicate why parking management is so vital to deliver a cleaner, safer and less congested world.

CONOR GREELY
**CHAIR OF THE BPA TECHNOLOGY,
INNOVATION AND RESEARCH BOARD**

December, 2020

INTRODUCTION

This report presents the findings from a research project exploring public attitudes towards parking. The research was conducted by ICM Unlimited on behalf of the British Parking Association (BPA) and provides an authoritative assessment of public opinion towards parking management with a further exploration of the reasons why these views are held.

The findings are based on two strands of research: six face-to-face qualitative discussion groups with the public and a robust quantitative survey with a nationally representative sample of 3,007 UK adults aged 18+. The qualitative research was conducted in August 2019 and the online survey in November 2019.

RESEARCH METHODOLOGY

QUALITATIVE PHASE: FOCUS GROUPS

ICM carried out six face-to-face qualitative discussion groups with members of the UK public in August 2019. A total of 36 people participated, six individuals per group. Across all six groups ICM ensured a broad mix in terms of gender, age, socio-economic status and ethnicity. One group was held exclusively with non-drivers, and all participants were over 17 years old. The qualitative findings broadly supported and provided more depth to the survey findings.

QUANTITATIVE PHASE: ONLINE SURVEY

ICM interviewed a nationally representative sample of 3,007 GB adults aged 18+ using an online methodology, between 15 and 25 November 2019. The sample was stratified as follows to ensure a robust sample in each nation:

- England – 2,052 responses
- Scotland – 504 responses
- Wales – 350 responses
- Northern Ireland – 101 responses

Demographic quotas by age, gender, work status and region (in England) were set to ensure a representative sample in each UK nation. At the analysis stage, data was weighted to the profile of all adults aged 18+ in each country and according to each nation's share of the UK total.



GENERAL ATTITUDES TOWARDS PARKING AND MOBILITY

KEY TAKEAWAYS

- ✓ Positive about supermarket/leisure destinations
- ✓ Support measures to reduce congestion and pollution
- ✓ Encouraged by active travel policies

Public attitudes towards parking spaces are generally mixed, with fewer than half of the population favourable towards off-street and on-street parking in their local area. However, people are more positive towards specific types of parking, notably those in supermarkets, leisure/sports/recreation centres, retail parks, and the area where they live.

These high ratings contrast with the low perceptions of parking in hospitals and local high streets, both partially driven by concerns around cost and time spent looking for spaces. It is logical that people are happy about parking where it tends to be readily available, cheaply or free (supermarkets) versus where it is not (high streets and hospitals).

Our research found there is good public support for measures which help reduce congestion and pollution. Indeed, over half of those surveyed said they would be

prepared to walk 5 – 10 minutes between a parking place and the high street, indicating there is already a good level of acceptance towards policies that encourage active travel and more walking and cycling as part of a journey's 'last mile'.

This bodes well as more local authorities implement schemes that support more active travel policies in the wake of the Covid-19 pandemic, by encouraging more people to park, walk and cycle and use peripheral parking sites that are cheaper and more accessible.

Park Active is a new initiative which we are leading with input from stakeholders and support from government to achieve this aim and help reduce traffic and congestion, improve air quality in town and city centres and provide more space for social distancing and freedom of movement.



LOCATION, LOCATION, LOCATION

KEY TAKEAWAYS

- ✓ Convenient parking close to destination favoured
- ✓ Majority find parking within five minutes
- ✓ Lack of spaces and size of bays causes frustration

It is clear that the general public considers a wide range of priorities when deciding where to park, with the single most important attributes being cost, proximity of the parking bay to the destination, safety and the size of the parking bay.

Indications are that the public favours parking which is convenient and in close proximity to their destination. This supports earlier research conducted in 2014 with users of Park Mark car parks (part of the [Safer Parking Scheme](#)) where almost 5,000 car parks are assessed based on personal safety, low crime and overall safer parking environments.

A lack of spaces is the most common reason why people are dissatisfied with parking overall in their local area, while cost and the size of parking spaces also drive negative perceptions.

Motorists talk most positively about parking at supermarkets, retail parks and the area where they live. Conversely, car parks in local high streets and, in particular, hospitals are poorly rated.

Overall, the majority of people find a parking space within five minutes, regardless of the venue or area where they are parking. However, over a third of people spend longer than ten minutes finding a parking space in local high streets.



PAYING FOR PARKING

KEY TAKEAWAYS

- ✓ Cost is not the main driver when choosing parking
- ✓ Recognition that well managed parking costs money
- ✓ Abuse of rules must be managed effectively

Our research reveals a nuanced picture regarding the cost of parking and the key drivers of dissatisfaction.

A significant number of people recognise that plentiful, safe, secure and spacious parking costs money and often, those who are accustomed to paying to park are more positive than those who are not.

Frustrations run high where the cost is seen to be disproportionate and unfair, especially with workplace parking and at hospitals, with the latter having an unrivalled ability to aggravate the public.

Whilst important, cost is not the single most important driver, with the public also prioritising the availability and size of parking spaces. And when it comes to specific improvements to parking management, prominent issues to be addressed include dealing effectively with the abuse of parking rules and enhancing security and safety.

In terms of methods of payment, the vast majority of people who pay for parking do so using cash via a parking payment terminal. This is more than double the proportion who use a parking payment terminal but pay with a credit/debit card. However since Covid-19, payment preferences may already have moved on significantly due to changing public attitudes to handling cash and touching buttons or screens.



ENABLING TECHNOLOGY TO SUPPORT AN INCREASINGLY MOBILE SOCIETY

KEY TAKEAWAYS

- ✓ Technology playing a leading role
- ✓ User experience generally favourable
- ✓ Wider adoption has potential to enhance public perceptions

Each day millions of vehicles make journeys that begin and end in parking and people want journeys to be seamless, and the parking experience to be memorably stress-free and efficient.

The impact of Covid-19 has further shifted behavioural change and exposed the urgency to better manage journeys and destinations in a smarter and more holistic way.

Our research shows that new technology in parking management has been positively received by those who have used it. For each of the forms of parking technology

researched, a greater proportion of people are satisfied than dissatisfied. Favourability is highest with barrier-free Automatic Number Plate Recognition (ANPR), parking payment terminals which require entering a full number plate, and barriers where payment requires using tickets or tokens.

Rolling out these smarter and more effective management tools to more users has the potential to enhance public perceptions of a rapidly evolving sector, ensure a better experience for motorists, greater availability of parking spaces, and a more mobile society.



MAKING PARKING BETTER FOR EVERYONE

KEY TAKEAWAYS

- ✓ Desire to see many forms of anti-social parking addressed
- ✓ Outside schools, on pavements and obstruction all cited as problem areas
- ✓ Recognition that well managed parking can have a positive impact

During our focus groups, participants were presented with seven aspects of parking and asked to rank them in order of how urgently they think they need to be tackled. Outcomes indicated that the public prioritise multiple areas for improvement rather than just one or two dominant issues which they feel need to be addressed.

In general, most people think that congestion caused by the school run is the most urgent issue that needs to be addressed, with just under a quarter highlighting this as an issue. However, this is only marginally ahead of several issues which command the support of around one in six people including pavement parking, parking too close at junctions, criminal activity and parking across more than one parking space.

Addressing parking which obstructs entrances and exits is seen as a problem to be solved but it is regarded as much less urgent, as is congestion caused by cars moving slowly to find a parking space.

The BPA has long campaigned for a change in the law to tackle obstructive and dangerous pavement parking and welcomes government's consultation with options put forward to deal with this.

Many people acknowledge the societal and economic benefits of parking to their local area, as well as the positive impact on their quality of life.

THE VOICE OF REASON SINCE THE BEGINNING

The Daily Times

TODAY
IS THE
DAY

FAKE NEWS

DON'T READ ALL ABOUT IT. STOP. USE REASON.
IT'S ALL ABOUT THINKING. CHECK YOUR SOURCES AND DO YOUR HOMEWORK BEFORE YOU BELIEVE OR REACT.

BUSTING MYTHS

Generally, the public is three times more likely to describe the stories they have heard about parking in the media as negative rather than positive with a third believing that media stories about parking accurately represent their own personal experience.

The main sources of news stories about parking are friends and family followed by colleagues, social media and local/regional sources such as newspapers, TV and radio. This shows how important it is for the sector to inform the media proactively with messaging and how initiatives such as the BPA supported Positive Parking Agenda have a key role to play to change the conversation.

Confirming the hypothesis underpinning this research, it is evident that most people are ill-informed about parking management. Arguably one of the principle findings is the existence of widespread and commonly held myths about parking and parking management by the population. A series of statements were presented to participants to measure how much their own experiences of parking matched reality.

FALSE Over half believed that some Parking/Traffic Attendants and Civil Enforcement Officers work to strict targets.



FACT Legislation and associated guidance clearly states that this practice is unlawful and unacceptable.

FALSE Just under half of people thought that there isn't a 10-minute grace period in addition to the parking period before enforcement can take place.*



FACT Both public sector and private parking mandates this in some way in Statutory Guidance and Codes of Practice respectively.
**applicable where parking is invited.*

FALSE

38%

Over a third thought that all the money gained from hospital car park charges goes to private companies.

FACT

The share that an operator receives for managing a hospital car park is generally determined through a robust competitive tendering process, ensuring that services are provided at the market rate and the hospital trust generates income that can be invested back into the car park / hospital.



FAIRNESS IN PARKING MANAGEMENT AND ENFORCEMENT

KEY TAKEAWAYS

- ✓ Majority agree parking tickets are an effective deterrent
- ✓ Language used on tickets is easy to understand
- ✓ Ticketing and appeals process generally well received

Our research shows that overall the public is more likely to agree than disagree that parking tickets are necessary and effective in deterring drivers from breaking the rules at the place of parking.

Of those who have received a parking ticket, the majority describe the language on the ticket as easy to understand.

Parking Attendants and Civil Enforcement Officers (CEO) receive considerable criticism from those who have received a parking ticket. Yet for all the claims of unfairness and a perceived victimisation of motorists, the overall ticketing and appeals process is generally well-received.

The launch in 2012 of an independent appeals service for tickets issued by BPA members on private land has been well received. And with the advent of a new single appeals service for the sector, perceived fairness is likely to increase yet further as more people become aware of the service and access it to challenge their tickets.



LOOKING TO THE FUTURE

Our research reinforces the sense that parking can be a highly frustrating issue for drivers and non-drivers alike but crucially, there is recognition that parking plays an important part in people's lives, with many holding strong views and caring deeply about the subject.

Conducted just prior to the Covid-19 nationwide restrictions on movement, the findings represent a valuable benchmark for comparisons in years to come. How parking is delivered in the future will undoubtedly evolve, and it's possible there could be more demand for parking because less people use public transport. Conversely, we could see less demand if more people continue to work from home.

Will 75% of the public continue to pay for parking in cash as the survey revealed, or will we see a shift to more contactless payment and fully automated systems due to changing attitudes and the evolution of new technology?

Attitudes towards congestion, safety and the environment will be important to track as they all relate to parking. For example, we may see a greater take up of out of town parking as more of us engage in active travel for our final mile of commute.

NEXT STEPS

These insights are invaluable for informing the development of a sustainable, customer focused parking sector. The BPA will harness the findings to support its campaigning and lobbying, including initiatives such as the [Positive Parking Agenda](#) and [Park Active](#), which provide an opportunity for the sector to use its insights to enable real change.

There is a clear role for the BPA and wider parking sector to do more to communicate the reasons why parking is managed, the associated individual and community benefits and that enforcement is sometimes necessary.

We also need to emphasise that those who manage parking in our communities and car parks are ensuring that streets and spaces are free from obstruction and in doing so perform an important function that allows everyone to park and go about their day.

CONTACT

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