

CAR GUARD / WATCH INDUSTRY
CONSUMER SURVEY

2018



PSiRA
Private Security Industry Regulatory Authority

CAR GUARD / WATCH INDUSTRY CONSUMER SURVEY
MARKET RESEARCH REPORT 2018

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Contents

1.	Introduction	1
1.1	Project Brief	1
1.2	Project Outline	1
1.3	Approach	1
1.3.1	Research Approach.....	1
1.3.2	Report Outline.....	2
2.	Car Guarding Concept.....	3
2.1	What is a car guard?.....	3
2.2	Who employs a car guard?	3
2.3	The reasons for car guarding?	3
3.	Survey Sample	4
3.1	Sampling Technique	4
3.2	Sampling Methodology	4
3.3	Research Limitations	5
3.3.1	Adequacy of the sample	5
3.3.2	Research Approach.....	6
3.4	Research Questions.....	6
3.5	Research Respondents	7
3.5.1	Group One Respondents: Ordinary Consumers.....	8
3.5.2	Group Two Respondents: Centre Managers.....	13
3.5.3	Groups Three Respondents: Municipalities.....	15
4.	Survey Findings.....	16
4.1	Group One: Ordinary Consumers.....	16
4.1.1	PSIRA Registration Awareness	16
4.1.2	Name Tags with Registration Details.....	17
4.1.3	Citizenship of Car Guards.....	17
4.1.4	Tipping of Car Guards	18
4.1.5	Harassment by Car Guards	20
4.1.6	Perceived Risk Posed by Car Guards.....	22
4.1.7	Involvement of Car Guards in Crime	24
4.1.8	Differentiation of services.....	25
4.1.9	Consumer Suggestions.....	26
4.2	Group Two: Shopping Centre Managers	29
4.2.1	PSIRA Registration Awareness	29



4.2.2 Name Tags with Registration Details..... 30

4.2.3 Citizenship of Car Guards..... 30

4.2.4 Reports of harassment 31

4.2.5 Reports of Perceived Risk Posed by Car Guards..... 33

4.2.6 Reports of the Involvement of Car Guards in Crime 34

4.2.7 Additional Centre Management Inputs 35

4.2.8 Managers Suggestions 36

4.3 Group Three: Municipalities 38

4.3.1 Awareness of PSiRA 39

4.3.2 Reports against Car Guards..... 39

4.3.3 By-Laws Related to the Control of Parking Attendants/ Car Guards..... 39

5. Summary 41

6. Overall Recommendations 44

6.1 Further Research..... 44

References 45



List of Tables

Table 1-1: Approach	2
Table 1-2: Report Outline	2
Table 3-1: Research Respondents Per Province	7
Table 3-2: Group One Respondents	8
Table 3-3: Group Two Respondents	14
Table 3-4: Group Three Respondents.....	15
Table 4-1: Overview of consumer comments	37
Table 4-2: Summary of Group Three Responses.....	38
Table 6-1: Overall Survey Recommendations	44

List of Figures

Figure 3-1: Customer Classification	4
Figure 3-2: Overview of Group One Respondents	9
Figure 3-3: Geography Type.....	10
Figure 3-4: Age Distribution	11
Figure 3-5: Race Distribution	12
Figure 3-6: Car Ownership	13
Figure 3-7: Overview of Group Two Respondents	14
Figure 4-1: Awareness of Car Guard Registration by Consumers	16
Figure 4-2: Display of Name Tags	17
Figure 4-3: Citizenship of Individuals Providing Car Guarding Service	18
Figure 4-4: Tipping of Car Guards.....	19
Figure 4-5: Tipping Amount per Province.....	20
Figure 4-6: Subjected to Harassment by Car Guard	21
Figure 4-7: Harassment by Car Guard	22
Figure 4-8: Perception of Risk Posed by Car Guards	23
Figure 4-9: Occurrence of Crimes by Car Guards	25
Figure 4-10: Ability to Differentiate Between Personnel	26
Figure 4-11: Awareness of Car Guard Registration by Managers	29
Figure 4-12: Display of Name Tags	30
Figure 4-13: Citizenship of Individuals Providing Car Guarding Service	31
Figure 4-14: Repots of Harassment.....	32
Figure 4-15: Steps Taken by Managers to Address Harassment.....	33
Figure 4-16: Reports of Perceived Risk Posed by Car Guards	34
Figure 4-17: Reports of the Occurrence of Crimes by Car Guards	35

List of Diagrams

Diagram 5-1: Summary of Consumers Surveyed	41
Diagram 5-2: Summary of Ordinary Consumers Surveyed	42
Diagram 5-3: Summary of Shopping Centre Managers Surveyed.....	43



1. Introduction

Urban-Econ Development Economists were commissioned by the Private Security Industry Regulatory Authority (PSiRA) to conduct a survey of consumers throughout South Africa that utilise car guard or watch services and entities that employ car watch services at their facilities.

The purpose of the research study is to survey the consumers of the car guard or car watch industry in terms of the level of satisfaction for services rendered, their knowledge of the requirements of compliance and the impact this has on their safety and security. The research findings are based on primary data collected during the surveys, from which certain recommendations have been provided for the PSiRA and the security industry.

1.1 Project Brief

The outcome of the study is focused on providing an analysis of consumer knowledge regarding the security compliance requirements by PSiRA and the overall impact that car guards have on safety and security. Therefore, in order to obtain relevant information, questionnaires were circulated to consumers that utilise car guard/ watch services throughout South Africa to gain valuable input from these individuals or entities.

1.2 Project Outline

The research is a questionnaire-based study that includes the following components:

- Identification of consumers
- Research questions
- Research findings
- Infographic summary
- Recommendations and conclusions

1.3 Approach

The study is based on quantitative research gathered from both telephone and electronic questionnaires completed by the respondents. The findings have been interpreted from the responses given in the questionnaires and the recommendations are informed by this data.

1.3.1 Research Approach

The research findings are presented according to the different consumers of car guard or car watch services that were approached to participate in the study. The consumers were grouped into different categories to provide various perspectives from individuals and entities that make use of such services throughout the country.

The research approach that was applied in this study consist of the following steps as illustrated in Table 1-1.



Table 1-1: Approach

Steps	Description
Step 1: Introduction and project overview	The proposed project and the purpose of the study is explored.
Step 2: Consumer identification and classification	The consumers that utilise car guard / watch services throughout South Africa are identified and categorised into certain groups.
Step 3: Sampling method	The method utilised for sourcing the various consumers and entities that were approached to participate in the survey is explained.
Step 4: Survey results	An overview an analysis of the car guard/ watch services consumer survey is provided.
Step 5: Study recommendations	The final conclusions and recommendations are conveyed to inform the most optimal way forward.

1.3.2 Report Outline

Table 1-2 presents an overview of the structure of the report.

Table 1-2: Report Outline

Section	Description
Section 1: Introduction and overview	This section provides an introduction and purpose of the study.
Section 2: Car guarding concept	This section provides a brief explanation into car guarding in the context of South Africa
Section 3: Consumer identification and sampling	This section identifies the consumers approached to form part of the study and provides insight into the rational and type of questions posed to the different groups.
Section 4: Survey results	This section provides a detailed analysis of the findings of the survey conducted, based on the different consumers of car guard or watch services.
Section 5: Summary	This section provides an infographic summary of the overall findings.
Recommendations and conclusions	This section provides conclusions and recommendations for the most optimal way forward for the Private Security Industry Regulatory Authority.



2. Car Guarding Concept

The research study examines the overall awareness of the Private Security Industry Regulatory Authority and perception of car guards by consumers and entities that have either experienced or made use of such services in the context of South Africa.

2.1 What is a car guard?

According to Sanders and Lynn, 2010 car guarding is the act of watching over or guarding a car at a public parking space in the driver's absence. An individual providing such a service would potentially act as a deterrent to potential car thieves and vehicle-related crimes. Although the main purpose of a car guard is to watch or guard cars, the car guard may also provide additional services such as pointing drivers to empty parking space, assisting with the loading of packages, returning trolleys, directing parking manoeuvres, and assisting with the control of traffic in these parking spaces.

2.2 Who employs a car guard?

Car guarding as an industry can be categorised as a formal and informal system. Therefore, car guards can be formally employed by a security company where they are registered and have uniform with a name tag. On the other hand, car guards can work informally and in the context of South Africa, car guarding is often considered an informal industry that emerged as a result of the country's high unemployment rate and poverty levels (Steyn, et al., 2015; McEwen & Leiman, 2008).

2.3 The reasons for car guarding?

Car guarding pertains to protective measures, providing a safe environment for consumers and workers and assisting to reduce negative behaviour or activities (such as loitering and vagrants). Therefore, car guards are mostly located at public spaces, including shopping centres, office complexes, central business districts, various institutions and occasionally at recreational areas and sports facilities where drivers park their cars.

Over the last two decades car guarding have has evolved from previously being an uncontrolled informal activity to a more organised response to vehicle-related crimes at shopping centres across South Africa. A number of shopping centre managers and business owners have intervened to provide or employ car guards formally by providing them with a uniform and name tag and ensuring that they are registered with the Private Security Industry Regulatory Authority. However, car guarding to a large extent remains an informal practice taking place informally in public streets and major city centres.

This research study is centred around the consumers of the car guard or watch industry and understanding the issues related to car guards. The next section provides an understanding into the types of consumers approached to form part of the study and provides the rational and type of questions posed to the different groups.



3. Survey Sample

In order to gauge the perception and level of satisfaction for car guard or watch services rendered, the knowledge of the requirements of compliance and the overall impact on the safety and security of customers in South Africa, a certain number of consumers had to be identified who would form part of the survey. The research respondents were categorised into three main consumer groups, as illustrated in Figure 3-1. **Group one** consists of the everyday consumers including people who own cars and utilise car watch services at shopping centres and office complexes. **Group two** includes entities which employ car watch services shopping centres such as property developer or owners and property management agencies. **Group three** includes certain municipalities that employ car watch services at their municipal offices.

Figure 3-1: Customer Classification



3.1 Sampling Technique

For the purpose of this study a quantitative research approach was adopted. A probability sampling method was applied to the sample population, where a simple random sampling technique was utilised to select the consumers to be surveyed. The selected consumers had the option of completing an electronic questionnaire or completing the questionnaire over the telephone. The responses were recorded and collated to form the basis of this research. In order to gain more informed responses, questionnaires were given to the three different groups.

3.2 Sampling Methodology

The consumers of car guard or car watch industry survey was conducted from October to November 2018, by Urban-Econ researchers. A national sample was drawn from a database of different consumers within South Africa. It is important to note that not all consumers within South Africa utilising car guard or watch services could form part of the research, therefore a sample size of between 200 - 300 respondents were initially selected. The respondents were identified and categorised into the different groups as explained below.

- Group One: Ordinary Consumers

A random sampling method was used to acquire everyday consumers listed on the South African Telephone Directory. The majority of the sample size would consist of everyday consumer including people who own cars and utilise car watch services at shopping centres or office complexes. Initially, the study aimed to have roughly 25 - 30 people per province which would provide roughly 225 - 270 people who would complete the survey either telephonically or electronically. However, there were



some limitations in obtaining the desired sample size per province, which is explained in the research limitations.

- **Group Two: Centre Management**

A random sampling method was used to obtain various entities and their centre managers listed on the Southern African Shopping Centre Directory published by the South African Council of Shopping Centres. Approximately 15% of the sample size consisted of entities which employ car watch services at shopping centres such as property developer or owners and property management agencies. In each province, three to four shopping centre managers, adding up to roughly 27 - 36 entities that were initially approached to complete the survey either telephonically or online.

- **Group Three: Municipalities**

A database of metropolitan, district and local municipalities sourced from the government website, was used to obtain the contact details of different municipalities in South Africa. From the database, six municipalities were selected and approached to participate in the survey as these municipalities were known to have employed car guard / watch services at their offices.

Overall the analysis of the primary data for this research was gathered from the selected consumers, shopping centre managers and municipal representatives who participated in the survey.

3.3 Research Limitations

The research limitations are mainly centred around the unequal provincial distribution of the respondents and the somewhat limiting nature of a quantitative based study.

3.3.1 Adequacy of the sample

The limitations of the research and the data can be seen in the instances of over and under representation in terms of geographical location and demographic characteristics of the survey sample. In group one, the initial target of between 25 -30 ordinary consumers could not be achieved in the following provinces Northern Cape (10), Limpopo (17), Free State (18) and Mpumalanga (21).

The main reasons that could have attributed to being unable to meet target vary, some of which may be related to the following:

- **Language:** The survey questions were only presented in English and not translated in any other official language in South Africa. This may have limited the responses as individuals were not able to complete the survey in their preferred language. Specially in Northern Cape and Free State where the predominant language spoken is Afrikaans. The same may be said for Limpopo where the predominant language is Sesotho.
- **Voluntary nature of survey:** Given that participation in the survey was voluntary and a number of individuals opted not to participate in the survey, which may have influenced the response rates.
- **Different population densities:** the population density per provinces differs significantly, as some have higher population densities, specifically in the metropolitan areas. Whereas other provinces, specifically Northern Cape have lower population densities. Therefore, the low response rates may be a result of their being fewer people these provinces.



The overall findings are based on the responses given by the respondents in this survey, and therefore cannot constitute all consumers in South Africa. The respondents make up 0.006% of the total number of households in South Africa that own vehicles or computers.

In group two, the initial target of between 27 -36 entities represented by shopping centre managers or security managers was surpassed. However, in group three the initial target of six municipal representatives could not be met. Despite numerous attempts to speak to the relevant officials at the selected municipalities only one representative was willing to participate in the survey. The metropolitan municipalities approached to participate indicated that all their security was dealt with by the metro police and who could not be reached. As a result, the findings cannot be considered fully representative of municipalities that employ car guards and should be read with in this in mind.

3.3.2 Research Approach

A quantitative research study can be seen as limited in the way in which the respondents' subjective experience is quantified. Given that the respondents were asked to respond to mostly closed-ended questions, they may not have been able to expand on their answers. Therefore, in order to allow for further expression and to provide their overall opinion on car guard or car watch services, a final open-ended question was included into the research for additional comments and suggestions. This insight will be used as part of the survey findings section of the study.

3.4 Research Questions

The research questions provide insight into the rationale for the study. Consumers, shopping centre managers and municipal officials were the main research respondents. The questions were adapted for each group of respondents. The questions posed to everyday consumers were as follows:

- a) Do you own a car?
- b) What is your age?
- c) What is your gender?
- d) What is your race?
- e) Which province do you live in?
- f) Do you live in an urban area/ suburb or rural area?
- g) Are you aware that car guards are required to register with the Private Security Industry Regulatory Authority (PSiRA)?
- h) Are you aware that car guards must display a name tag with their PSiRA Registration number and the security company they are working for?
- i) Are you aware that for one to provide a car guarding service and be registered by PSiRA, they must either be a South African citizen or South African Permanent Residence holder?
- j) Do you generally tip car guards at parking lots/bays? and if so, how much do you normally pay?
- k) Have you ever been subjected to harassment by a car guard in parking lots/bays, and if so, what steps did you take to address the harassment?
- l) Do you find car guards posing a risk to your car (including your belongings in your car)?
- m) Have you had an experience of car guards involved in car jamming or other petty theft crimes within parking lots or bays?
- n) Are you able to differentiate between a car guard, packing assistant, trolley assistant, or parking marshal?
- o) Do you have any other comments, concerns or questions regarding car guard/ watch services?



The questions posed to shopping centre managers and municipal officials were as follows:

- a) Are you aware that car guards are required to register with the Private Security Industry Regulatory Authority (PSiRA)?
- b) Are you aware that car guards must display a name tag with their PSiRA Registration number and the security company they are working for?
- c) Are you aware that for one to provide a car guarding service and be registered by PSiRA, they must either be a South African citizen or South African Permanent Residence holder?
- d) Has anyone ever reported or been subjected to harassment by a car guard in parking lots/bays, and if so, what steps did you take to address the harassment?
- e) Has anyone ever reported that car guards pose a risk to their car (including your belongings in their car)?
- f) Has anyone reported car guards for being involved in car jamming or other petty theft crimes within parking lots or bays?
- g) Do you have any other comments, concerns or questions regarding car guard/ watch services?

Management & Municipalities



Certain control questions related to demographic were asked to everyday consumers, whereas shopping centre managers and municipal officials were only asked questions related to car guard or watch services. The questions seek to understand the awareness of consumers and entities with regards to PSiRA and the perception of car guards on the respondents.

3.5 Research Respondents

A total of 294 respondents formed part of the research, this subsection provides an overview of the number of respondents that participated in the research in terms of the different provinces across the South Africa as indicated in Table 3-1.

Table 3-1: Research Respondents Per Province

Province	Number of Respondents	Total Respondents
Eastern Cape	40	<div style="text-align: center;"> <h1>294</h1> </div>
Free State	21	
Gauteng	74	
KwaZulu-Natal	38	
Limpopo	21	
Mpumalanga	25	
North West	30	
Northern Cape	15	
Western Cape	30	

From the 294 respondents, 253 of them were made up of ordinary consumers and 41 were shopping centre managers. In addition to this, one municipal representative also gave input in terms of the car guard/ watch services they employ at the municipal offices.



The information regarding the number of respondents is presented according to the following three groups:

- Group One: Ordinary Consumers
- Group Two: Shopping Centre Managers
- Group Three: Municipalities

3.5.1 Group One Respondents: Ordinary Consumers

Ordinary consumers form a large part of the respondents of research, these are consumers who own cars or make use of car guard or watch services at various shopping centres or office complexes across South Africa. Table 3-2 presents the total number of respondents who completed the survey, either electronically or telephonically.

Table 3-2: Group One Respondents

Group One Ordinary Consumers	Province		Electronic Surveys	Telephone Survey	Total
	1				
	1	Eastern Cape	32	4	36
	2	Free State	6	12	18
	3	Gauteng	20	49	69
	4	Kwa-Zulu Natal	23	9	32
	5	Limpopo	7	10	17
	6	Mpumalanga	7	14	21
	7	North West	9	18	27
	8	Northern Cape	7	3	10
	9	Western Cape	14	9	23
		Subtotal		125	128

Table 3-2 shows that the Gauteng province had the greatest number of respondents. However, some provinces had very low response rates, specifically Northern Cape, Limpopo and Free State. A number of consumers in these provinces were approached to form part of the research but opted not to participate. Therefore, more consumers from Gauteng and Eastern Cape were approached for their input, to increase the total number of research respondents.

3.5.1.1 Location

A key aspect in this research is the location of the respondents, to ensure that the result reflect both the national and provincial overview in the findings. The location and demographic characteristics of respondents provides an understanding of the type of consumers that participated in the research. The respondents from group one were specifically asked demographic questions, including where they reside, their age and race group. Figure 3-2 shows the percentage distribution per province of the research respondents in group one.



Figure 3-2: Overview of Group One Respondents

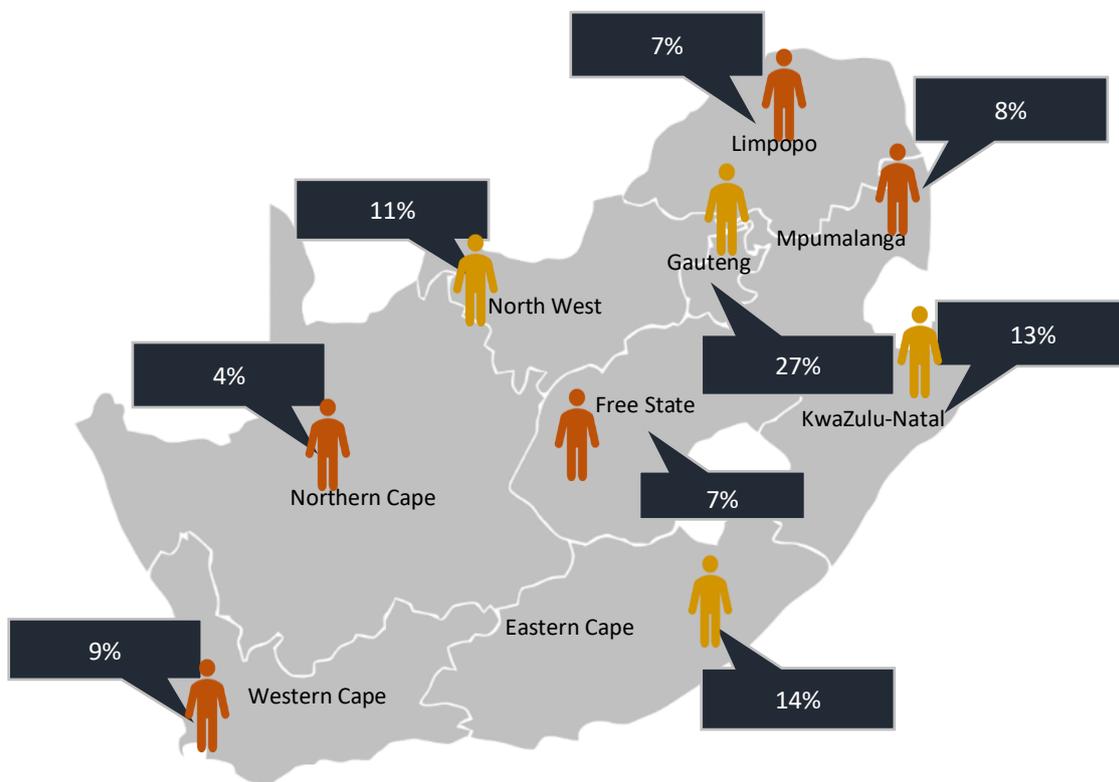


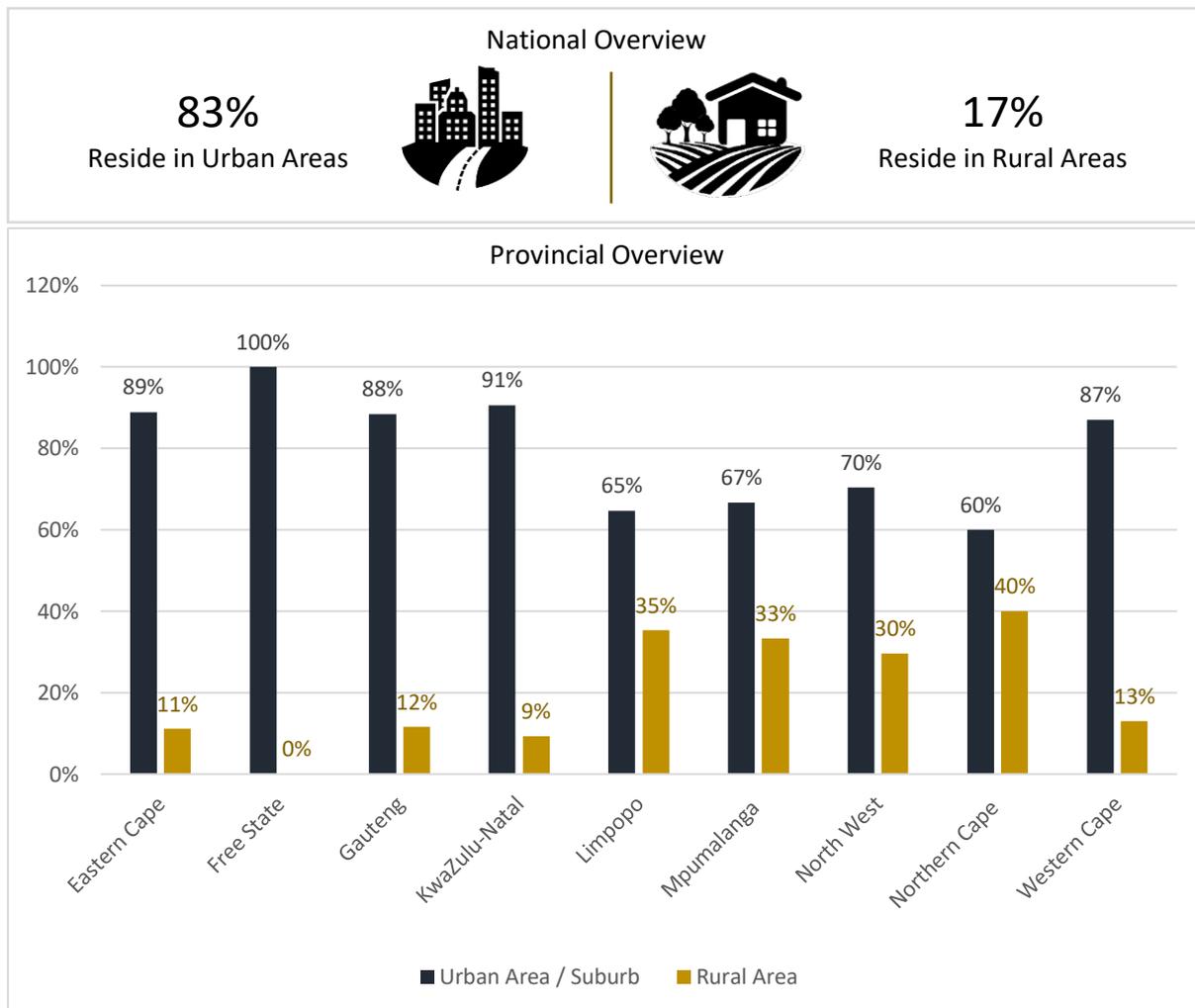
Figure 3-2 shows that 27% of the respondents were from Gauteng, followed by Eastern Cape and KwaZulu-Natal with 14% and 13% respectively. Northern Cape, Limpopo and Free State had less than 20 respondents. However, each province is represented in the overall research study.

3.5.1.2 Geographical Type

In addition to identifying which province the research respondents are based in, this was further categorised in terms of the geographical type namely urban and rural areas. An urban area refers to a geographical area or settlement with a high population density and infrastructure consisting of towns, cities and suburbs. A rural area refers to an area with a low population density characterised by farms, villages and countryside located outside towns and cities. Figure 3-3 shows which type of area the respondents reside in from a national and provincial perspective.



Figure 3-3: Geography Type



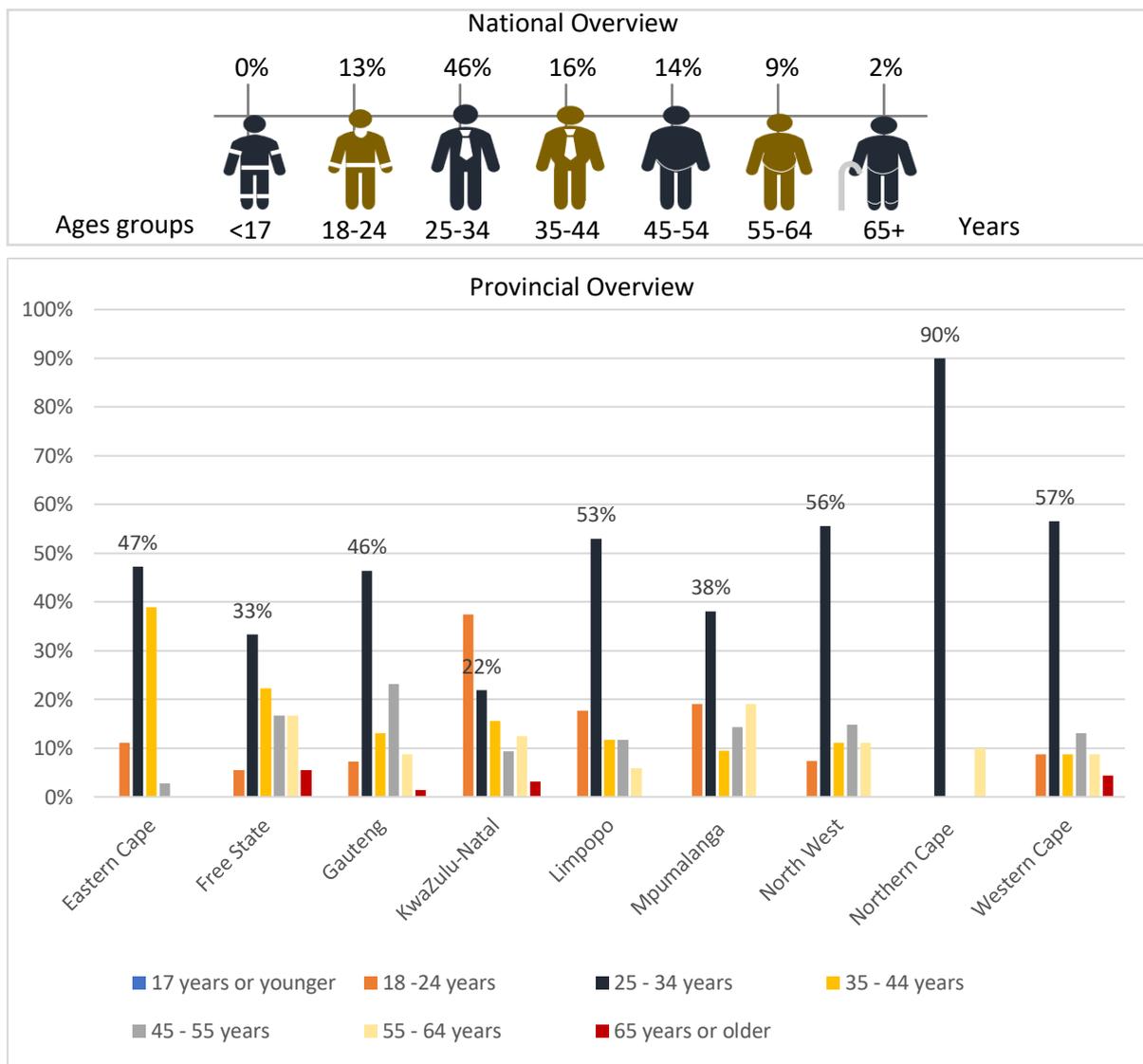
Based on the above data, approximately 83% of the respondents reside in urban areas across the country, whereas approximately 17% live in rural areas. A significant number of respondents in Northern Cape, Limpopo, Mpumalanga and North West reside in rural areas. However, most of the respondents currently live in urbanised parts of the country, within the different suburbs. This suggests that the majority of respondents would have most likely interacted with car guards at various shopping centres or office complexes located in either urban or rural centres.

3.5.1.3 Age Distribution

The age distribution provides an overview of the frequency of different ages from the respondents surveyed. This provides context for the research in targeting respondents who were of legally driving age and would own a car or had access to a car in order to have encountered car guards. Figure 3-4 shows the national and provincial percentage distribution of the respondents in each of the main age groups.



Figure 3-4: Age Distribution



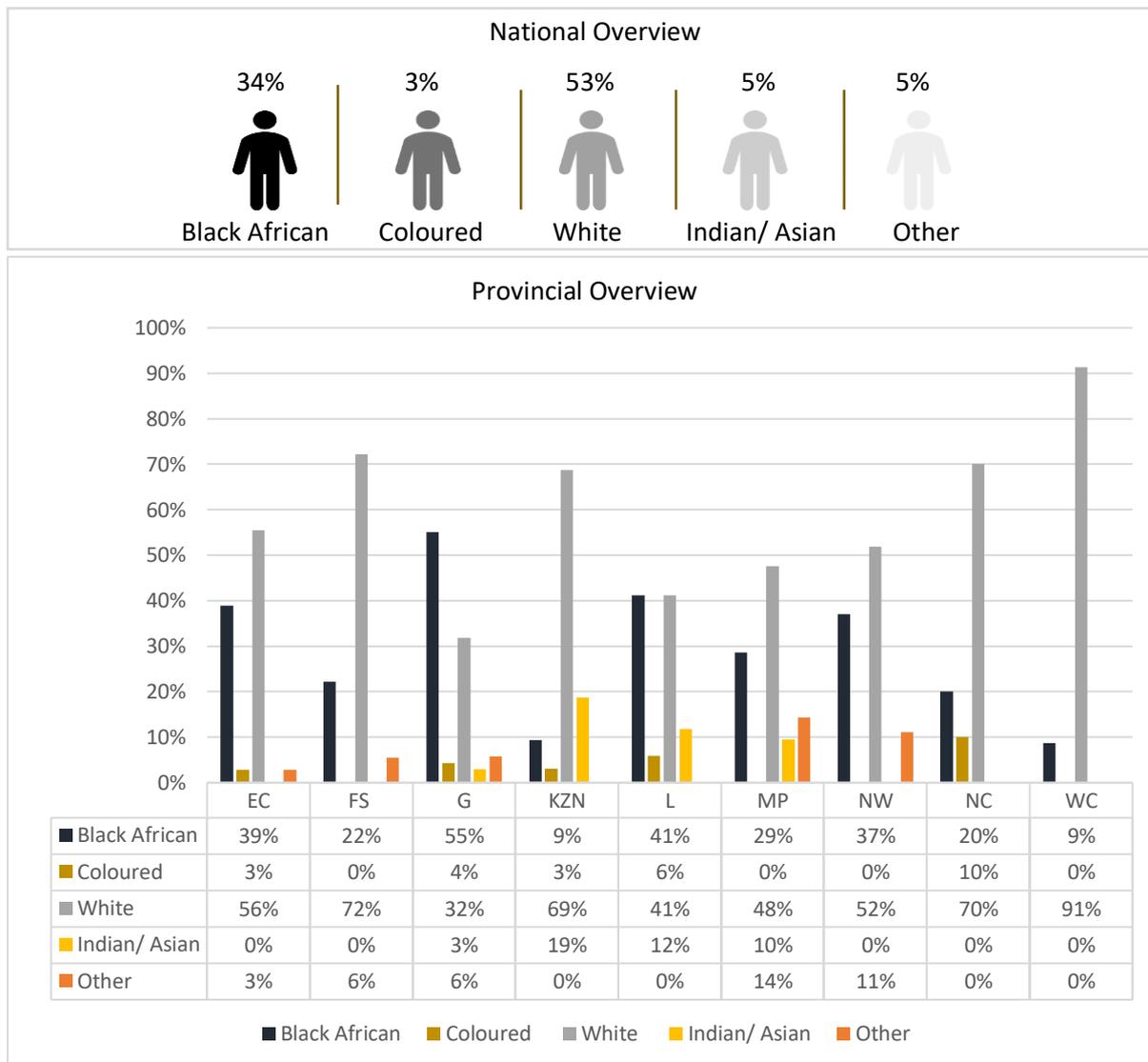
The representation of the age distribution indicates that the respondents were of different ages, where the average age was 34 years old. The respondents between 25 to 34 years old account for approximately 46% of the total number of respondents. Approximately 16% of the respondents are between 35 to 44 years old and approximately 23% of the respondents are middle-aged (45 to 64 years old). Young adults make up approximately 13% of the respondents, whereas the more elderly respondents only make up 2% of the respondents. Therefore, all the research respondents are categorised as adults who form part of everyday consumers of car guard or watch services.

3.5.1.4 Race Distribution

The racial groups within which people are categorised assists in identifying various people who share distinct and similar physical characteristics. In South Africa, the main racial groups include, Black African, Coloured, White, Indian/ Asia and Other. The distribution of respondents in terms of the different race groups were investigated as part of the research. Figure 3-5 shows the national and provincial percentage of respondents that fall within the different racial groups.



Figure 3-5: Race Distribution



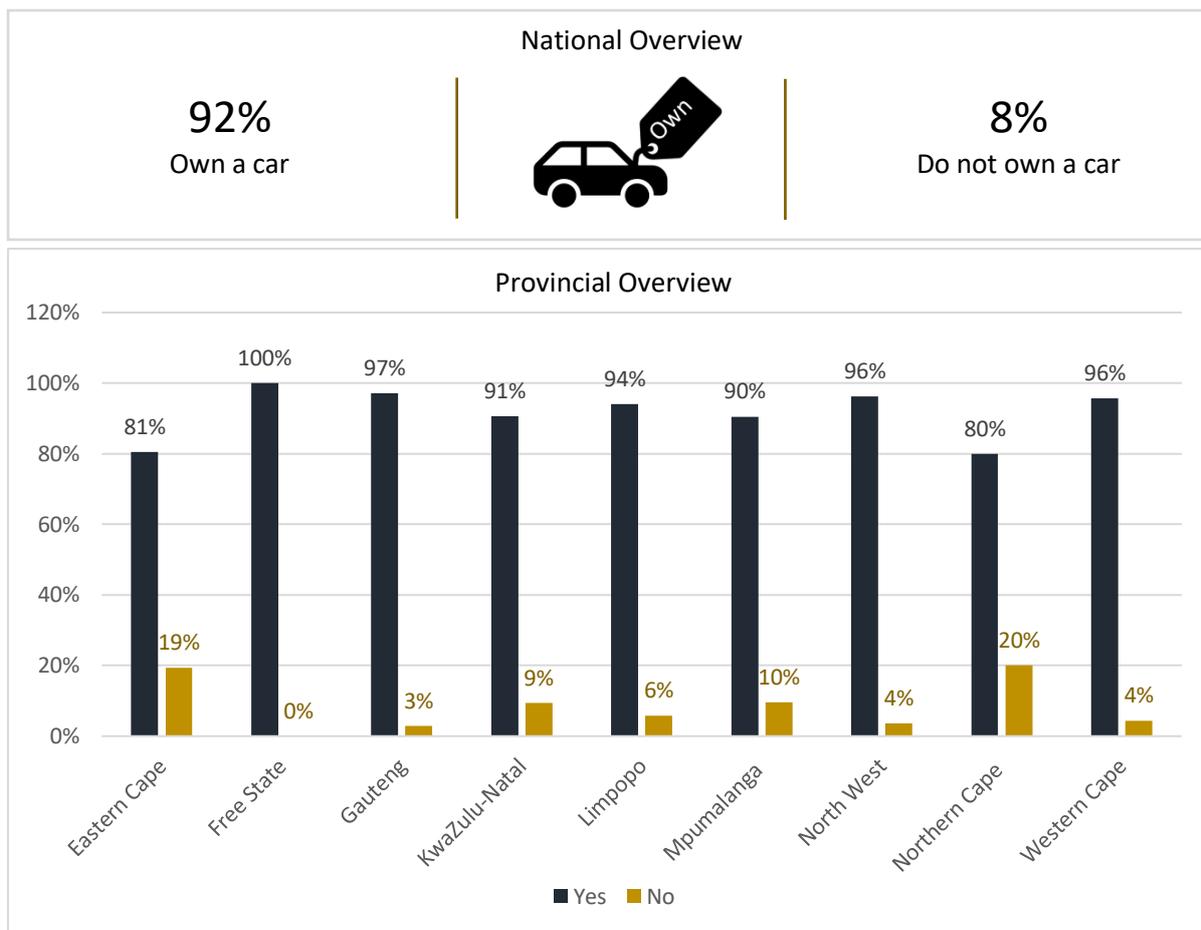
According to the data, approximately 53% of the respondents are categorised as part of the White racial group. Black Africans make up 34% of the respondents and the remaining racial groups including Coloured, Indian/Asian and Other make up 13% of the respondents. Therefore, the findings of this research reflect the opinions and viewpoints held by these research respondents.

3.5.1.5 Car Ownership

The purpose of the study was to gain input from consumers that have interacted with car guards across the country. Therefore, this research is focused on the consumers of car guard or watch industry; as a result, the majority of the respondents that were targeted owned or had access to a car. Figure 3-6 shows the percentage distribution of car ownership amongst the respondents.



Figure 3-6: Car Ownership



Based on the data, approximately 92% of the respondents own a car, whereas only 8% indicated that they did not own a car. The respondents that indicated that they did not own a car were also included in the research, as they did interact with car guards at parking lots at some point.

The information above provides an understanding into the geographically and demographic characteristics of the respondents surveyed as part of this research. Therefore, the findings, recommendations and conclusions deduced in this research refer to those of the respondents and cannot be assumed to be the opinions of all consumers utilising car guard / watch services across South Africa.

3.5.2 Group Two Respondents: Centre Managers

Car guard or watch services have become more evident at shopping centres across the country, therefore this research included input from shopping centre managers and security managers at retail facilities. Table 3-3 presents the total number of these respondents who completed the survey, either electronically or telephonically.



Table 3-3: Group Two Respondents

Group Two Shopping Centre Management 	Province		Electronic Surveys	Telephone Survey	Total
	1	Eastern Cape	4	0	4
	2	Free State	0	3	3
	3	Gauteng	4	1	5
	4	Kwa-Zulu Natal	5	1	6
	5	Limpopo	3	1	4
	6	Mpumalanga	3	1	4
	7	North West	2	1	3
	8	Northern Cape	1	4	5
	9	Western Cape	7	0	7
Subtotal		29	12	41	

Table 3-3 shows that a total of 41 shopping centre managers participated in the research. Most of the responses were gained electronically in comparison to telephone surveys. The target of 3-4 managers was reached in each province. A major part of in this research was the location of the respondents, to ensure that the result reflect both the provincial and national overview of the findings. Therefore, the location of the shopping centre managers / security managers provides an understanding of the distribution of these respondents across the country.

The respondents from group two were specifically asked questions related to their awareness of PSiRA and any incidences or reports regarding car guards. Figure 3-7 shows the percentage distribution per province of the research respondents in group two.

Figure 3-7: Overview of Group Two Respondents

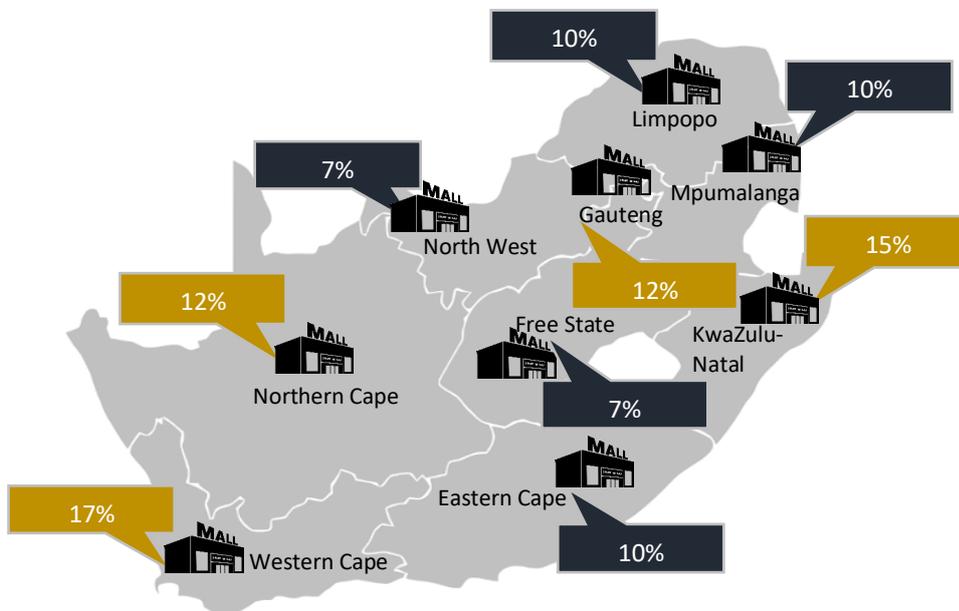


Figure 3-7 shows that the highest number of the respondents were managers of retail facilities in Western Cape. This is followed by KwaZulu-Natal with approximately 15%, and 12% in both Northern Cape and Gauteng respectively.



The Free State and North West provinces had the lowest response rate with only 7% respectively. It is important to note that there were a number of shopping centres that were managed by the same property companies, however each province is represented in the research.

3.5.3 Groups Three Respondents: Municipalities

In recent years, some municipalities have employed car guards or security guards at their municipal offices. This research aimed to include input of municipal officials and security managers responsible for security and parking at the selected municipalities. A total of six municipalities were approached to form part of this research, as presented in Table 3-4.

Table 3-4: Group Three Respondents

Group Three	Municipality	Province
Municipalities 	1 City of Johannesburg Metropolitan Municipality	Gauteng
	2 City of Tshwane Metropolitan Municipality	Gauteng
	3 JB Marks Municipality (Potchestroom & Ventersdorp)	North West
	4 City of uMhlathuze Municipality	KwaZulu-Natal
	5 AbaQulusi Local Municipality	KwaZulu-Natal
	6 Ugu District Municipality - Ray Nkonyeni Local Municipality	KwaZulu- Natal

The municipalities listed above were selected based on previous knowledge of car guards being utilised at the different municipal offices. However, whilst conducting the surveys only one municipality completed the survey. Some of the municipal representative indicated that they did not employ car guards or that the Metro Police was responsible for all security at the municipalities.

The research findings for all three groups of consumers that utilise car guard / watch services are explained in the next section.



4. Survey Findings

The survey findings will assist in providing insight form consumers of car guard / watch services as to their level of awareness of the Private Security Industry Regulatory Authority and understand their perception of car guards. This section provides a discussion around the research findings of the different groups of respondents that were surveyed. The findings have presented in three subsections based on responses from (1) ordinary consumers, (2) shopping centre managers and (3) municipalities.

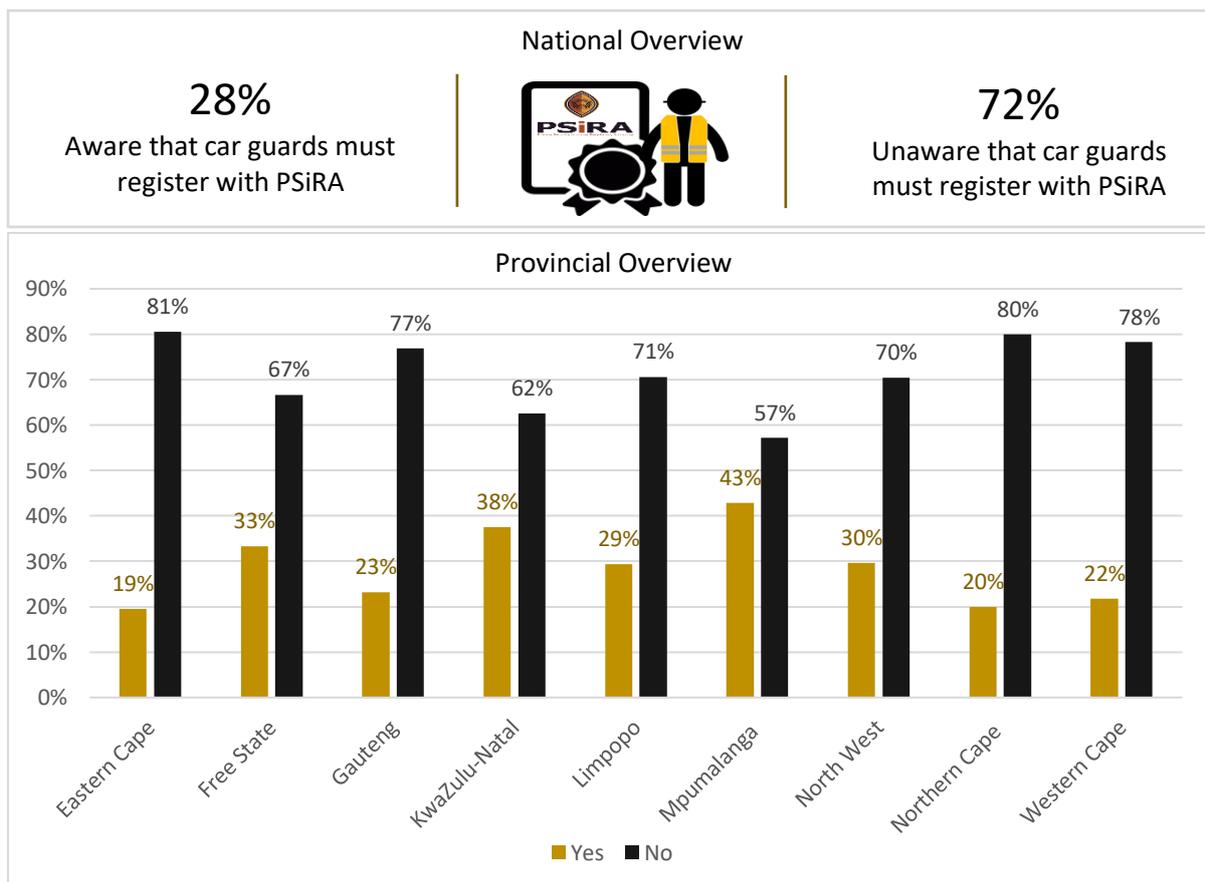
4.1 Group One: Ordinary Consumers

Ordinary consumers of car guard or watch services at various facilities across South Africa were targeted as the main group of respondents for the research. The findings for this group are presented below.

4.1.1 PSiRA Registration Awareness

It is important to establish the overall awareness of consumers for the regulatory authority for private security. Figure 4-1 indicates the national and provincial percentage distribution in terms of the level of awareness of the respondents with regards to car guards being required to register with the Private Security Industry Regulatory Authority.

Figure 4-1: Awareness of Car Guard Registration by Consumers



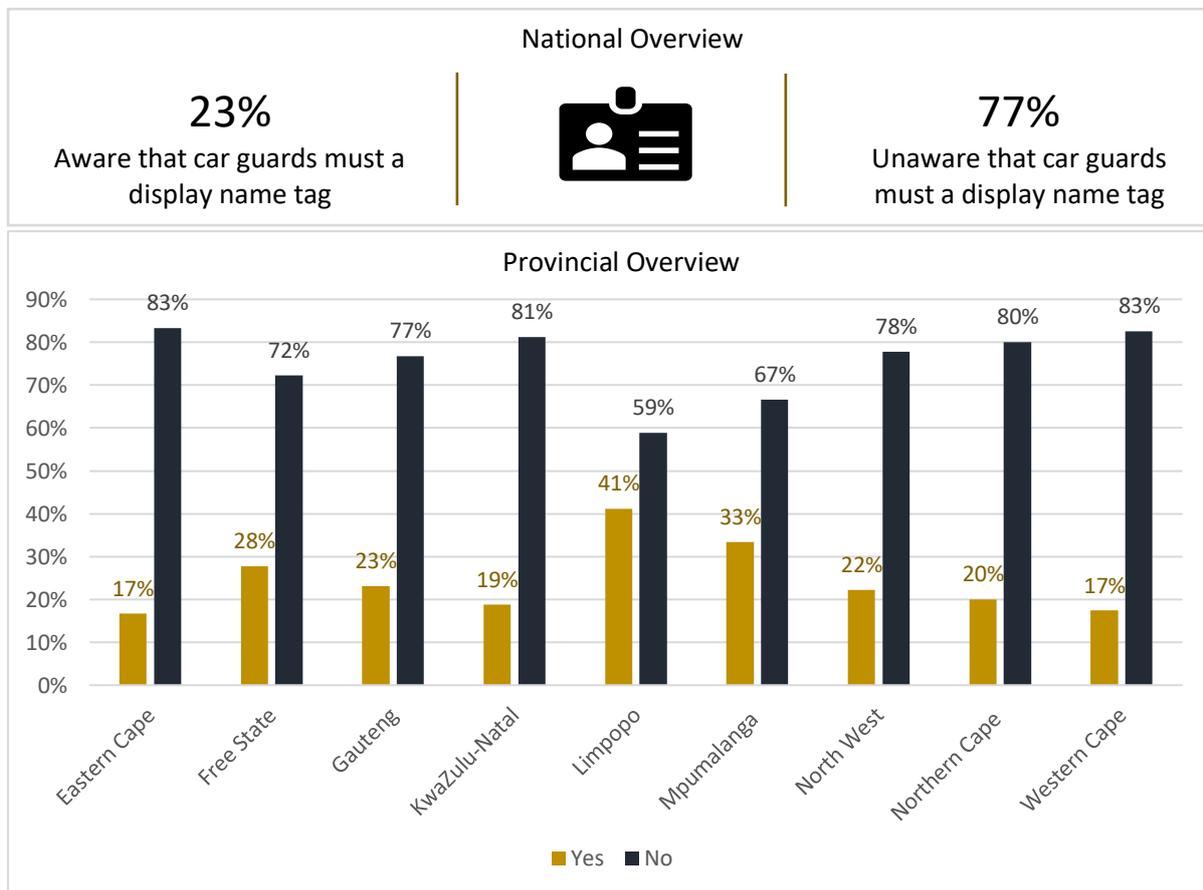
A question was posed to ordinary consumers to determine whether they aware that car guards were required to register with PSiRA. Most of the respondents (72%) indicated that they were unaware of this, whereas only 27% indicated that they were aware that car guards had to register with PSiRA. The level of awareness of PSiRA registration was highest in Mpumalanga with approximately 43% and the lowest in the Eastern Cape with only 19%.



4.1.2 Name Tags with Registration Details

In order to assist with the identification of security personnel, PSiRA requires car guards to be registered with them. Figure 4-2 indicates the national and provincial percentage distribution in terms of the level of awareness of the respondents with regards to car guards being required to display a name tag with their PSiRA registration details.

Figure 4-2: Display of Name Tags



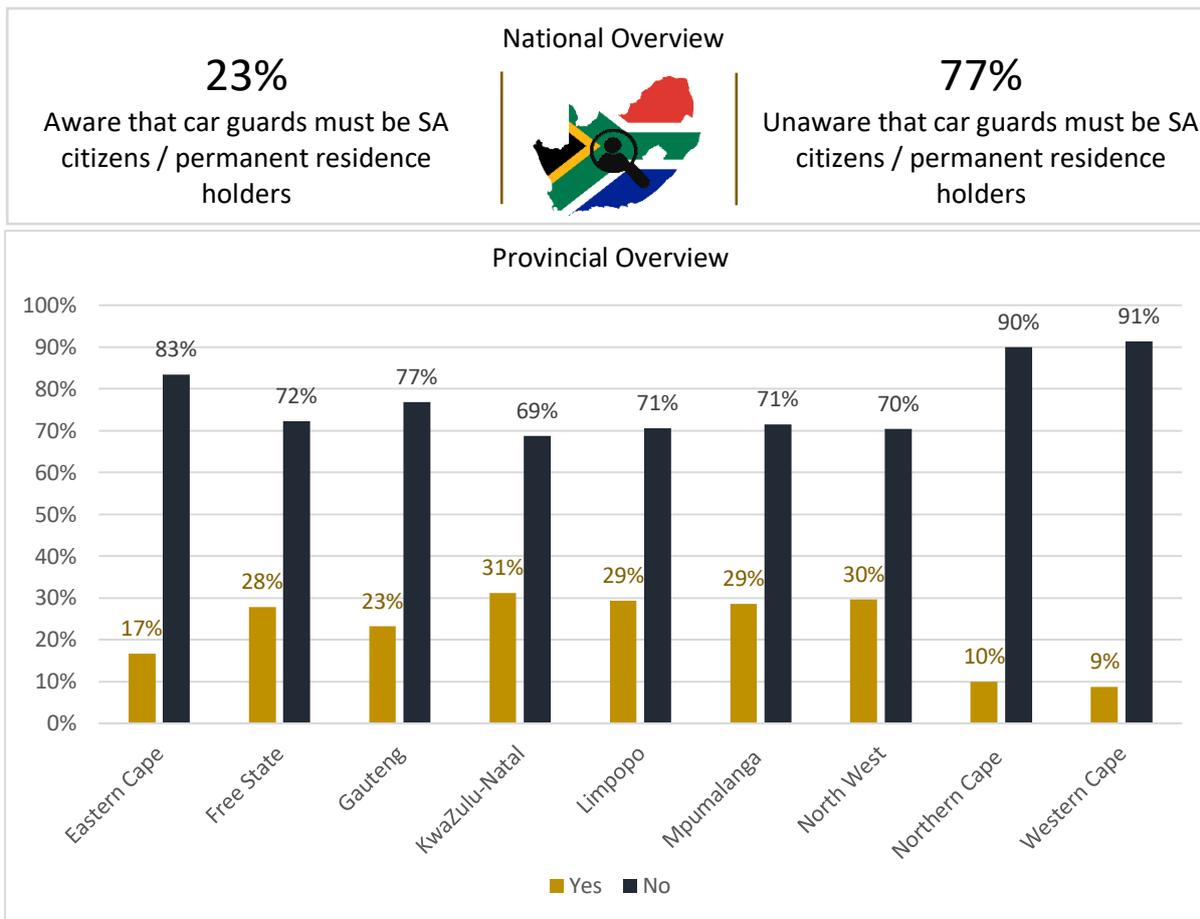
A question was posed to ordinary consumers to determine whether they were aware that car guards were required to display a name tag with their PSiRA registration number and the security company they are working for. Approximately 77% of the respondents indicated that they were not aware of this, whereas only 23% indicated that they were aware. The level of awareness of car guards requiring name tags was highest Limpopo with approximately 41% followed by Mpumalanga with 33% respectively. Overall most of the respondents in the different provinces were unaware that car guards were required to display a name tag with the relevant PSiRA details.

4.1.3 Citizenship of Car Guards

The identity and status of citizens may be considered an important requirement of employment. PSiRA specifies that for one to provide a car guarding service and be registered with PSiRA, they must either have South African citizenship or have Permanent Residency in South Africa. Figure 4-3 indicates the national and provincial level of awareness in terms of car guard citizenship.



Figure 4-3: Citizenship of Individuals Providing Car Guarding Service



A question was posed to ordinary consumers to determine whether they were aware that for one to provide a car guarding service and be registered with PSiRA, they must either be a South African citizen or South African Permanent Residence Holder. Approximately 77% of the respondents were unaware of this requirement for car guards, whilst 23% indicated that they were aware of this. Respondents from KwaZulu-Natal had the highest level of awareness (31%), whereas Western Cape had the lowest level of awareness (9%).

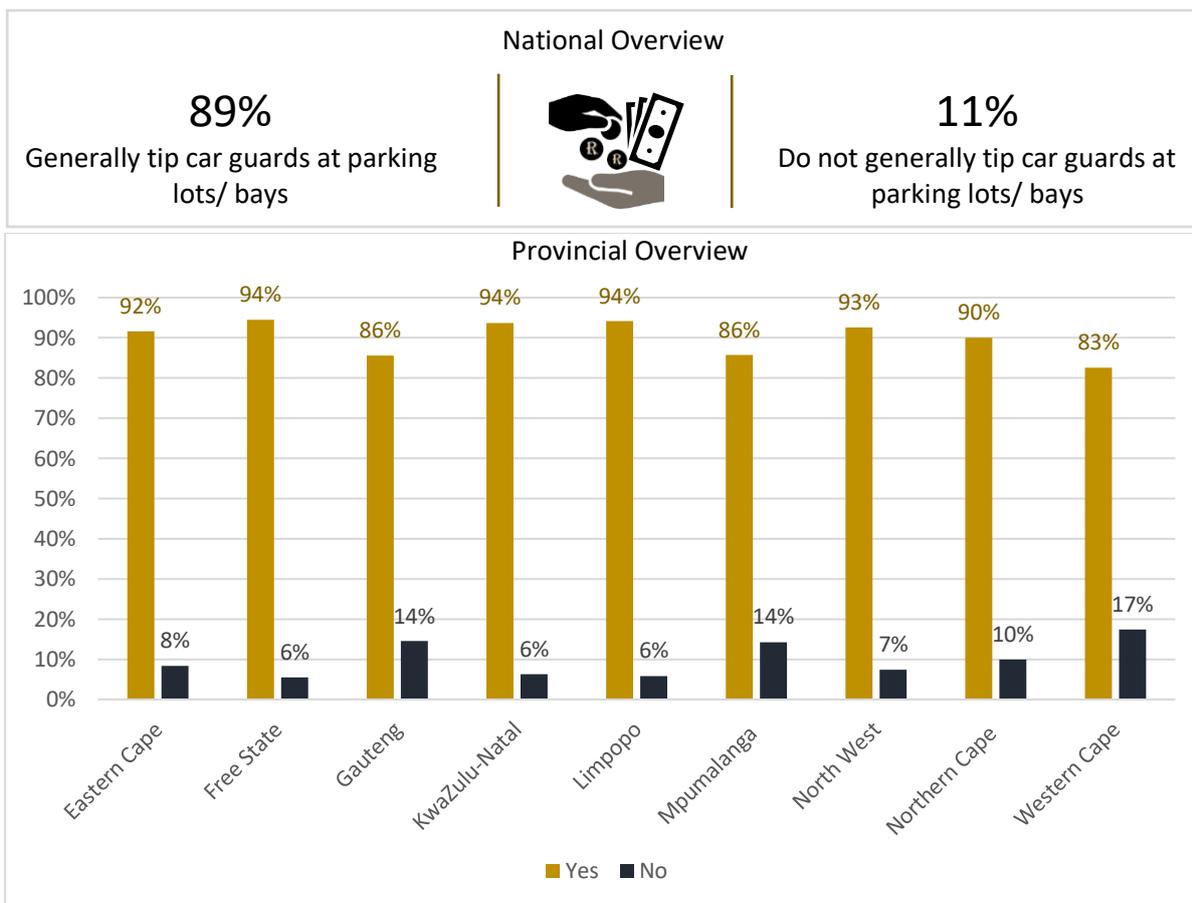
In terms of the overall awareness of the Private Security Industry Regulatory Authority, most of the respondents were unaware of car guards being required to register, display a name tag with their PSiRA registration number and the security company that they are employed by or that for one to provide a car guarding service, one should have South African citizenship or permanent residency.

4.1.4 Tipping of Car Guards

Consumers of car guard / watch services around South Africa, would often leave voluntary sums of money (referred to as “tips”) to the car guards that have assisted them. Many would consider tipping as a unique economic activity because consumers could avoid paying this voluntary expense as tipping after a service has been rendered is not legally required. Figure 4-4 indicates the national and provincial percentage distribution of respondents with regards to the tipping of car guards at parking lots or bays.



Figure 4-4: Tipping of Car Guards

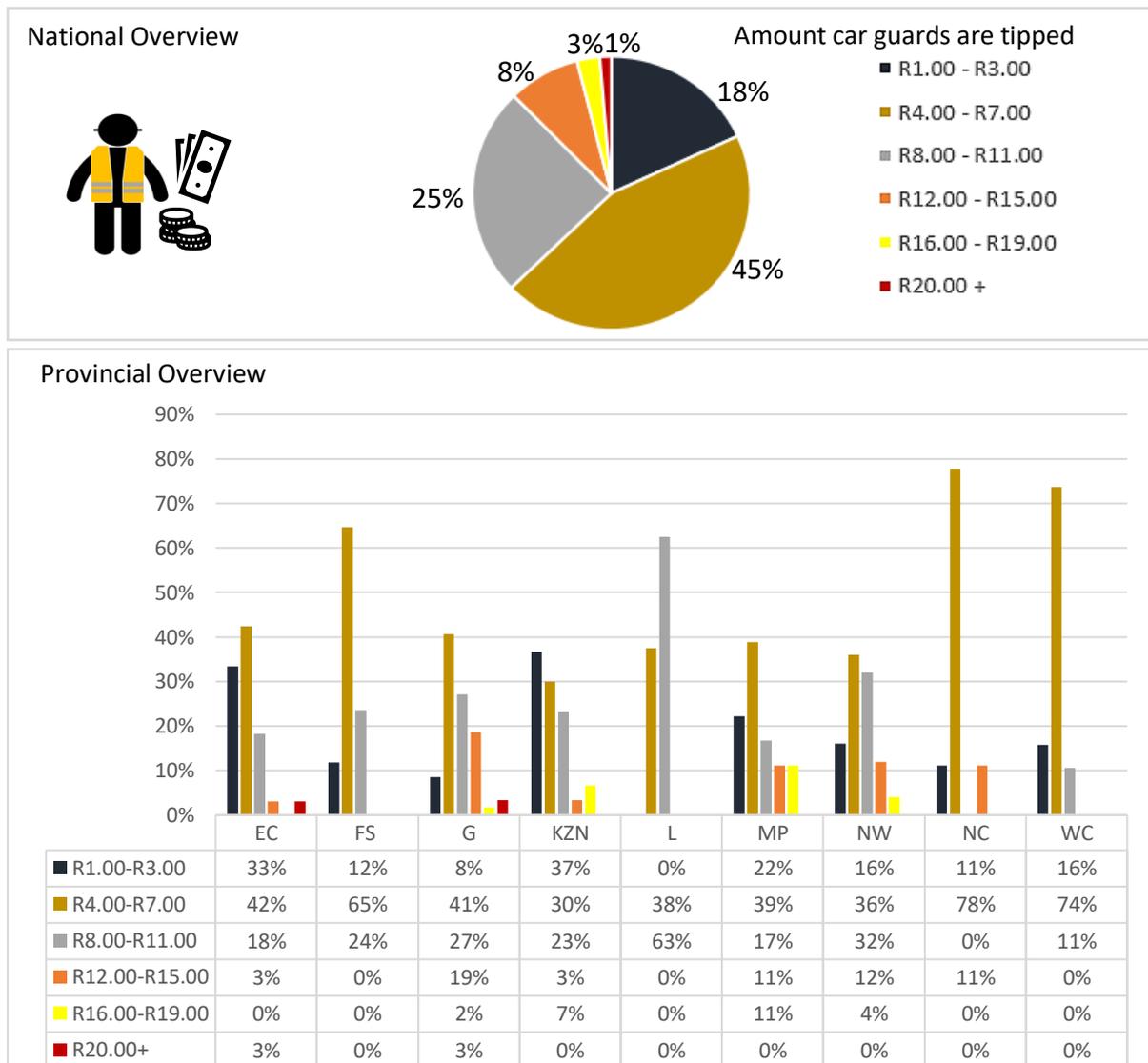


A question was posed to ordinary consumers to determine whether they generally tip car guards at parking lots/ bays. From a national perspective, most of the respondents (89%) indicated that they do tip car guards, whereas only 11% indicated that they did not tip. The provincial distribution indicates that 83% of respondents would tip car guards.

Research studies reveal that the most commonly noted reasons for tipping include (1) to gain good quality service in future; (2) to reward good/ quality service; (3) to gain social approval or to avoid social disapproval and (4) to conform to internalised tipping norms (Sanders & Lynn, 2010). Therefore, for this study a question was posed to the respondents that indicated that they do tip car guards to specify the amount that they normally pay. Figure 4-5 indicates the national and provincial percentage distribution of respondents with regards to the tipping of car guards at parking lots or bays.



Figure 4-5: Tipping Amount per Province



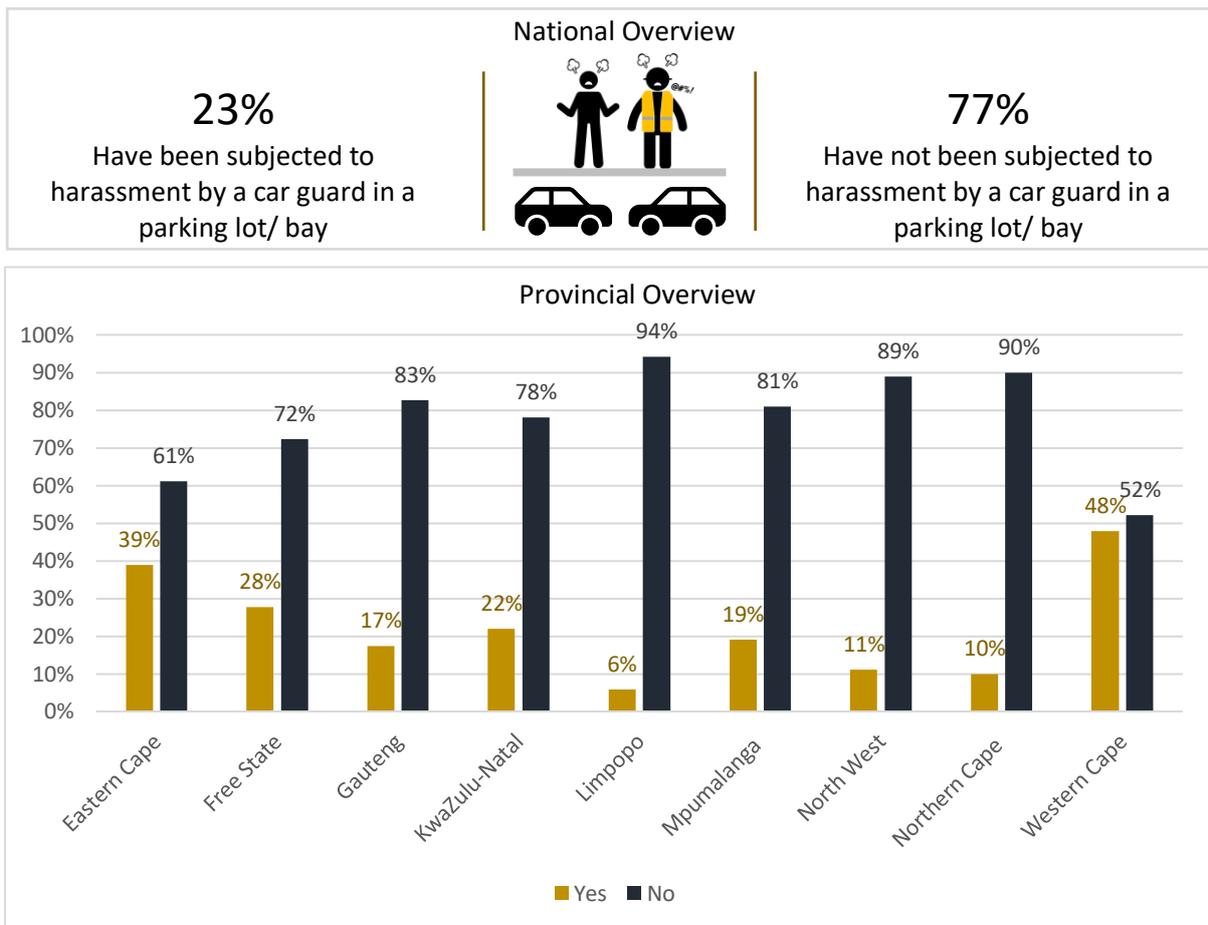
From a national perspective, approximately 45% of respondents would pay between R4.00 to R7.00; and 25% would pay between R8.00 to R11.00. Approximately 18% of respondents would pay car guards between R1.00 to R3.00. This suggests that most consumers are less likely to leave large tips for car guard or watch services. Most of the respondents in the different provinces would generally pay car guards between R4.00 to R7.00. Only 3% of the respondents in Gauteng and Eastern Cape would pay R20.00 or more. Overall 88% of the respondents would pay car guards R11.00 or less, whereas as only 12% of the respondents would tip R12.00 or more.

4.1.5 Harassment by Car Guards

This subsection focuses on the prevalence of harassment of consumers by car guards in parking lots or bays. Figure 4-6 indicates the national and provincial percentage distribution in terms of whether respondents had ever been subjected to harassment by car guards within parking lots or bays.



Figure 4-6: Subjected to Harassment by Car Guard

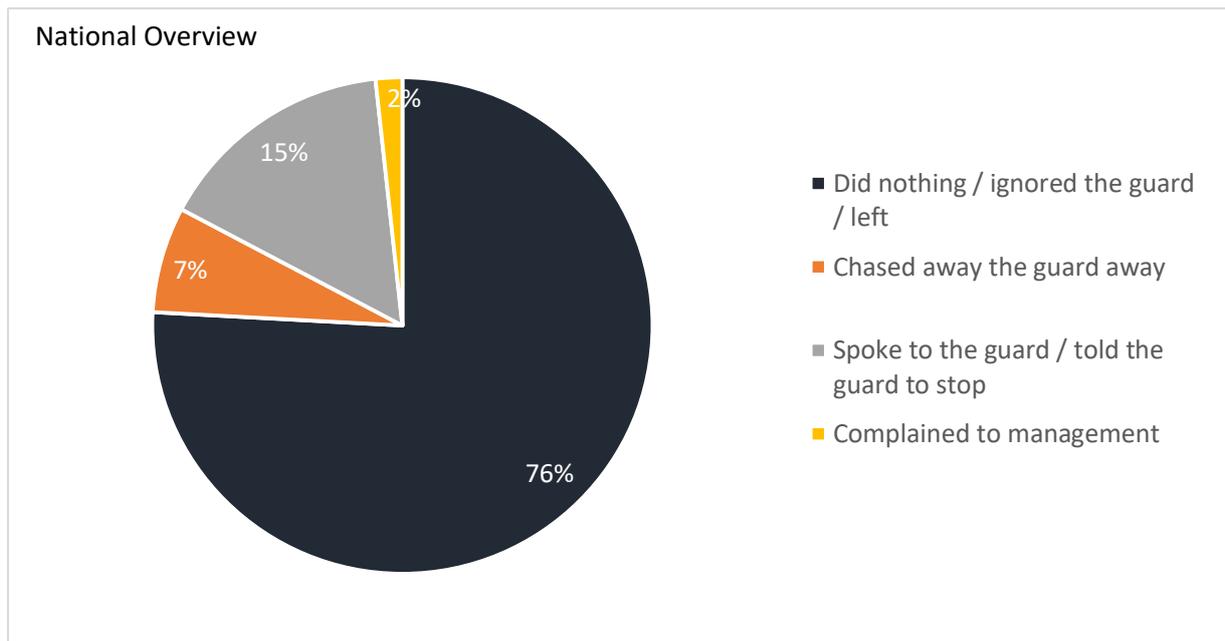


A question was posed regarding whether respondents had ever been subjected to harassment by a car guard in parking lots or bays. From a national perspective, most of the respondents (77%) indicated that they had not been subjected to harassment, whereas 23% indicated that they had been harassed by car guards. The nature of the harassment tended to be more verbal than physical. In Western Cape, approximately 48% of the respondents revealed that they had been harassed by a car guard. In Eastern Cape, approximately 39% of the respondents also revealed that they had been subjected to harassment by car guards.

In order to prevent the reoccurrence of harassment certain steps would generally be required to address the harassment. Therefore, respondents who experienced harassment were asked to indicate the steps they took to address the harassment that they were subjected to by car guards. Figure 4-7 provides a national overview of the steps taken to address the harassment.



Figure 4-7: Harassment by Car Guard



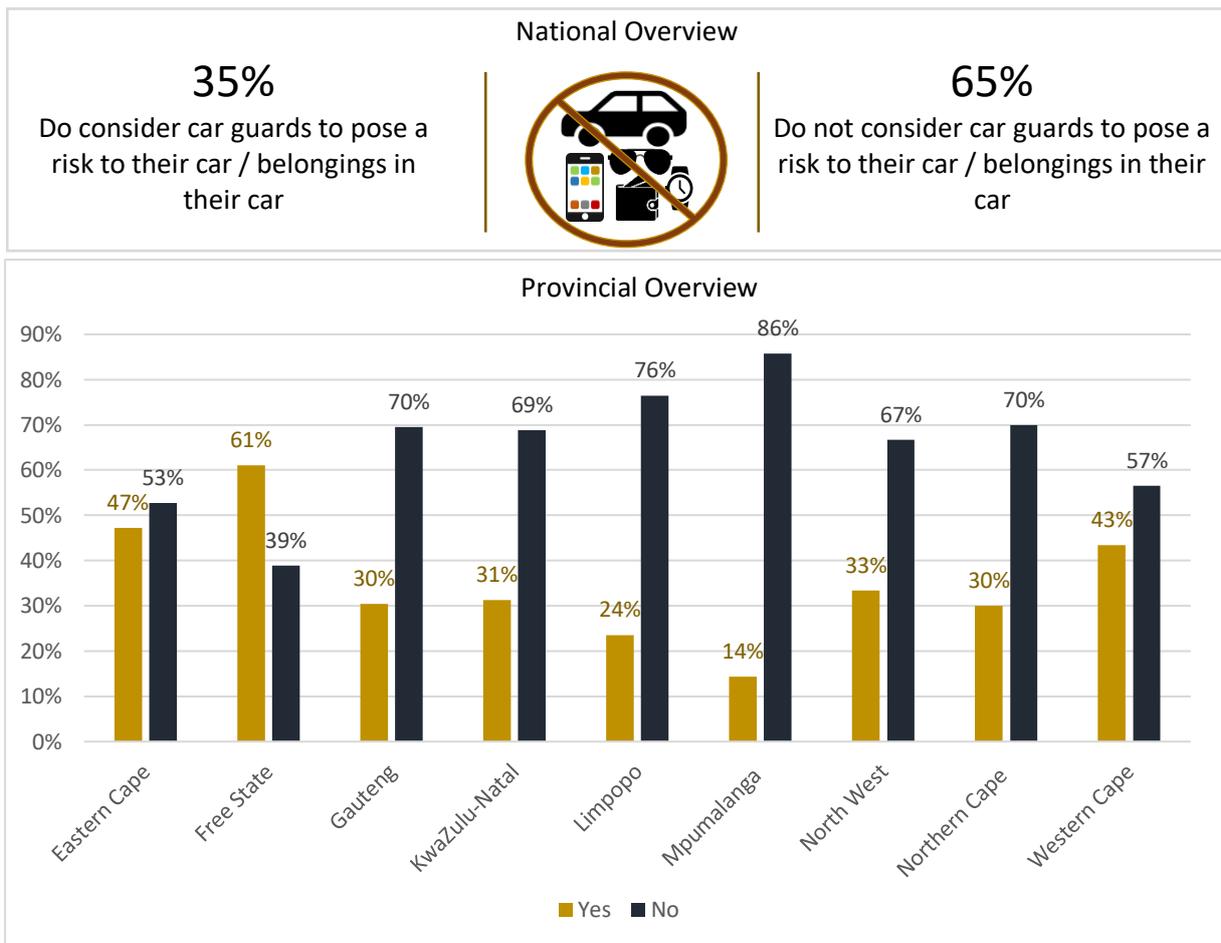
From the responses given, approximately 76% of the respondents did not take any action to address the harassment that they were subjected to by car guards in parking lots or bays. These respondents opted to ignore the car guard and just leave. Only 2% of the respondents laid a complaint with management, whereas 15% of the respondents spoke to the guards themselves and 7% indicated that they chased the guard away or forced the guard to stop. This suggests that most of the harassment is not adequately addressed and the car guards that have harassed consumers are not reprimanded for their actions.

4.1.6 Perceived Risk Posed by Car Guards

The main purpose of car guards is assumed to be to watch over a consumer’s car and deter any potential car thieves. However, some may suggest that car guards, actually pose a risk to consumers’ cars. Therefore, the research respondents were asked to indicate their opinion with regards the perceived risk posed by car guards. Figure 4-8 indicates the national and provincial percentage distribution in terms of whether respondents consider car guards to pose a risk to their cars including the belongings in their cars.



Figure 4-8: Perception of Risk Posed by Car Guards



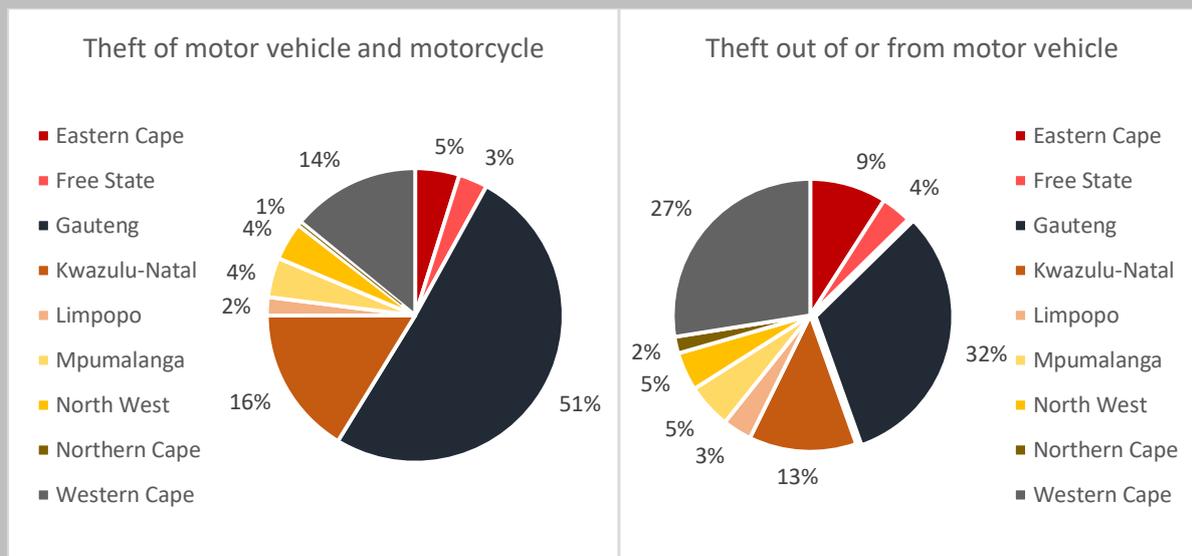
A question was posed to respondents regarding whether they found that car guards pose a risk to their car including the belongings in their car. From a national perspective, most of the respondents (65%) indicated that they did not consider car guards to pose a risk to their car, whereas 35% did perceive some sort of risk from car guards. In the Free State province, approximately 61% of the respondents felt that car guards did pose a risk to their car. The respondents from Eastern Cape and Western Cape also revealed similar perceptions with 47% and 43% respectively. However, most of the respondents in the remaining provinces felt that car guards did not pose any risk to their car or the belongings contained in their cars.



Crimes Statistics in South Africa

Given the high crime rate in South Africa and numerous reports of theft within parking lots or bays, security has become a major concern for many South Africans. In response to this, a number of private security companies have emerged in addition to the services provided by the South African Police to try to reduce crime. In order to understand the level of crimes associated with vehicles, the crime statistics were investigated. The 2018 crime statistics of reported car theft in the different provinces are presented below.

Percentage Distribution of Motor Vehicle Thefts per Province



Source: Crime Statistics South Africa, 2018

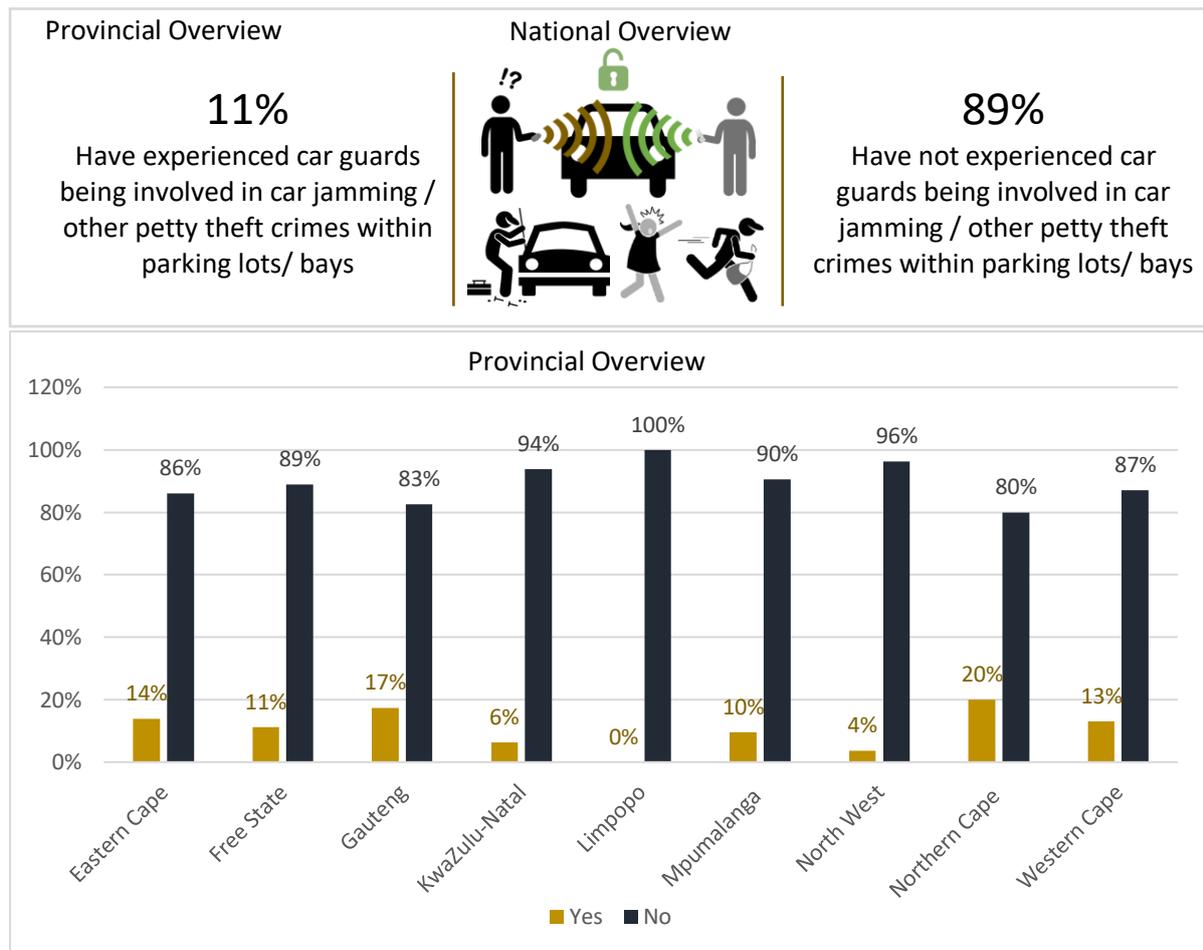
From the crime statistics illustrated above, Gauteng has the highest (51%) number of reported cases of theft of motor vehicle and motorcycle as well as the highest number of reported cases of theft out of or from motor vehicle. This is followed by Western Cape and KwaZulu-Natal with 16% and 14% motor vehicle thefts respectively. In 2018, 50 652 cases of theft of motor vehicle and motorcycles were reported in the country and 129 088 cases of theft out of or from motor vehicle were reported. The potential offenders of such crimes have generally been assumed to be gangsters, homeless or assisted by car guards.

4.1.7 Involvement of Car Guards in Crime

A question was posed to the respondents regarding whether they had experienced car guards being involved in crimes. Figure 4-9 indicates the national and provincial percentage distribution per province in terms of whether respondents experienced car guards being involved in car jamming or other petty theft crimes.



Figure 4-9: Occurrence of Crimes by Car Guards



Based on the responses given, most of the respondents (80% or more) had not experienced a car guard being involved in a car jamming or other petty theft crime within parking lots or bays. However, approximately 20% of the respondents in Northern Cape indicated that they had experienced this. In Gauteng, approximately 17% of the respondents also experienced car guards being involved in such crimes. According to crime statistics, Gauteng and Western Cape have the two highest number of reported cases of theft regarding motor vehicles and motorcycles in South African.

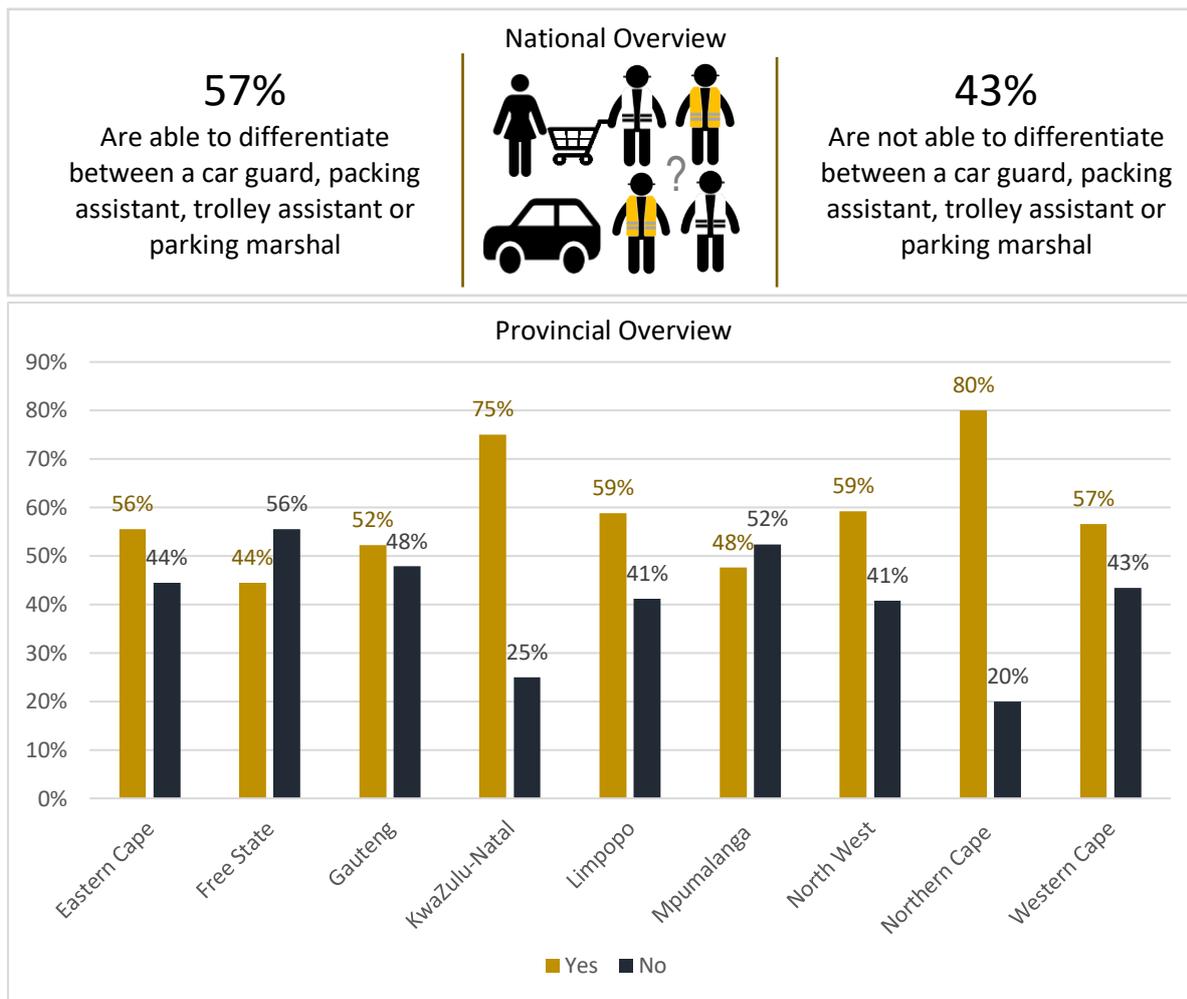
In terms of harassment, risk to one's car and car jamming or other petty theft crimes by car guards, most of the respondents do not consider car guards to be involved with such activities. However, some respondents did note instances of verbal harassment, risk of damage to cars, car jamming and theft by some car guards.

4.1.8 Differentiation of services

Generally, within shopping centre parking lots and inside the mall, a number of personnel's in uniforms may be seen throughout the mall, all of whom provide certain services and/or assistance to shoppers. These include car guards, packing assistants, trolley assistants and parking marshals. The overall level of awareness of the different personnel and ability to differentiate between them was investigated in this study. Figure 4-10 indicates the national and provincial percentage distribution in terms of whether respondents were able to distinguish between car guards, packing assistants, trolley assistants and parking marshals.



Figure 4-10: Ability to Differentiate Between Personnel



Based on the responses, approximately 57% of the respondents are able to differentiate between a car guard, packing assistant, trolley assistant or parking marshal, whereas 43% indicated that they are not able to differentiate the personnel. This may be attributed to a lack of awareness of the different roles and that the personnel are not visible to the public.

Most of the respondents are able to differentiate between car guards, packing assistants, trolley assistants and parking marshal, however there are a number of consumers that are not able to distinguish. This suggests that more effort needs to be taken in ensuring that the different personnel are easily identifiable to consumers.

4.1.9 Consumer Suggestions

As part of the survey, respondents were asked to provide additional comments with regards to car guards. The comments and suggestions given varied, with some respondents having a positive perception of car guards whereas other respondents considered car guards in negative way. The comments have been summarised in the subsequent pages.



4.1.9.1 Provide Valuable Service

A few respondents had very positive perceptions of car guards, noting that from their encounters with them, they considered car guards to be friendly, polite and passionate about their work. Some car guards were noted to also provide consumers with warnings of theft, which was considered very helpful. Other respondents echoed the similar sentiments, adding that car guards work very hard and that they deserve to be recognised by companies and be formally employed with a stable monthly income. Some of the comments shared by two respondents are noted below:

“Sometimes I do tip car guards not with money only, but I buy them coke or juice as part of my tip to them. The car guards at our shopping centres are very good, kind and hardworking. What makes me angry is that rich/wealthy [other] customers tend to use car guards to off load their groceries and then do not tip them (not) even just a coin” – 51-year-old respondent from KwaZulu-Natal.

“It is becoming a necessity in South Africa in my opinion, you feel much better knowing (that) after leaving your car there for a few minutes or hours that there are people looking after it, rather than [it being] in empty parking lots” - 39-year-old respondent from Western Cape.

Based on the above, there are some consumers that consider car guarding as a valuable service which formalised in order to allow them to earn a monthly wage/ salary.

4.1.9.2 Provide an Unnecessary Service

Although a few respondents considered car guards to provide good service, most of the other respondents held a more negative viewpoint of car guards. Some respondents felt that car guarding services are unnecessary with modern vehicles that have parking assist technology. A respondent considered their assistance as somewhat of an irritation because he was able to park on his own. One of the comments shared by a respondent is noted below:

“I don't think their services are necessary with modern vehicles. They are unlikely to stop hijackings in car parks or stop a criminal who is intent on entering your vehicle as they have no training in security. They are more of a nuisance who harass and beg than actually serving a purpose” – 35-year-old respondent from Eastern Cape.

This suggests that some respondents would prefer that there were no car guards at various shopping centres in particular because they do not consider the car guards capable to assist in deterring vehicle-related crimes.

4.1.9.3 Inappropriate Behaviour for Not Tipping

A number of issues were raised regarding the inappropriate behaviour of car guards when it came to tipping. Some respondents noted that car guards would curse or threaten them for not giving them a tip. In some instances, it was explained that the car guards would demand more money when respondents had parked their cars for a long period of time. The respondents felt that some car guards only desired money without actually watching their cars. One of the comments shared by a respondent is noted below:

“[Car guards need] to accept what one can afford to tip/pay for what one can afford without being rude or feeling entitled when their service comes across like a hustle and not an official occupation” – 29-year-old respondent from Gauteng.



Some respondents also raised questions regarding paid parking at malls and the pressure to tip car guards. Most felt that they were paying for their parking twice, which they considered to be unnecessary. Therefore, there seems to be instances of “double pay” specifically at shopping malls that require consumer to pay for their parking and pay car guards, even though consumers are not legally required to tip car guards.

4.1.9.4 Risk of Damage to Vehicles

A few respondents indicated that they did not feel comfortable leaving their cars certain spaces regardless of their being car guards. Some of the respondents indicated that felt that if they did not comply with the requests of the car guards that they would potentially damage their cars. One of the comments shared by a respondent is noted below:

“[The] risk they [car guards] pose is damaging the car paint if the customer doesn’t show interest in the service they offer” – 35-year-old respondent from Eastern Cape.

Other respondents also suggested that car guarding did not ensure that their cars were safe and that their cars could still be damaged, broken into or stolen. Concerns were also raised regarding how individuals were selected to be car guards, specifically if the appropriate background and criminal investigations are conducted before hiring individuals. It was noted that if these checks had not been conducted, this would put consumers and their cars at risk.

4.1.9.5 Unable to Identify Car Guards

In terms of being able to properly identify car guards, a number of respondents raised concerns in this regard, specifically in terms of the not being able to clearly distinguish car guards and other personnel. It was noted that individuals watching over cars all seem to wear similar vests / reflector jackets with no form of identification. One of the comments shared by a respondent is noted below:

“Some of them have a uniform or [wear] a reflector, but you are not sure if the people who assist are really car guards – 26year old respondent from Mpumalanga.

Based on the above, this may suggest that the appearance of car guards in terms of not only looking professional, but also being easily identifiable does have an influence on the perception of car guards by consumers. In addition to a uniform a name tag with relevant information would assist in help to identify car guards.

4.1.9.6 Communication and Training

Other issues raised in the comments were related to the poor communication and lack of training of car guards. Some of the respondents felt that car guards were sometimes rude and demonstrated poor customer service. One of the comments shared by a respondent is noted below.

“Some car guards don’t really have the communication skills. I think they should be provided with formal training on how to speak to their clients” - 23-year-old respondent from Limpopo.

Based on the above responses, the respondents would prefer that car guards be adequately trained, not only in security but also in customer service. This would assist improving communication issues experience with some car guards and encourage more positive interactions.

The next subsection presents the findings for group two, which consists of the 41 shopping centre managers that participated in the research as well as some inputs from other shopping centre managers that did not participate.



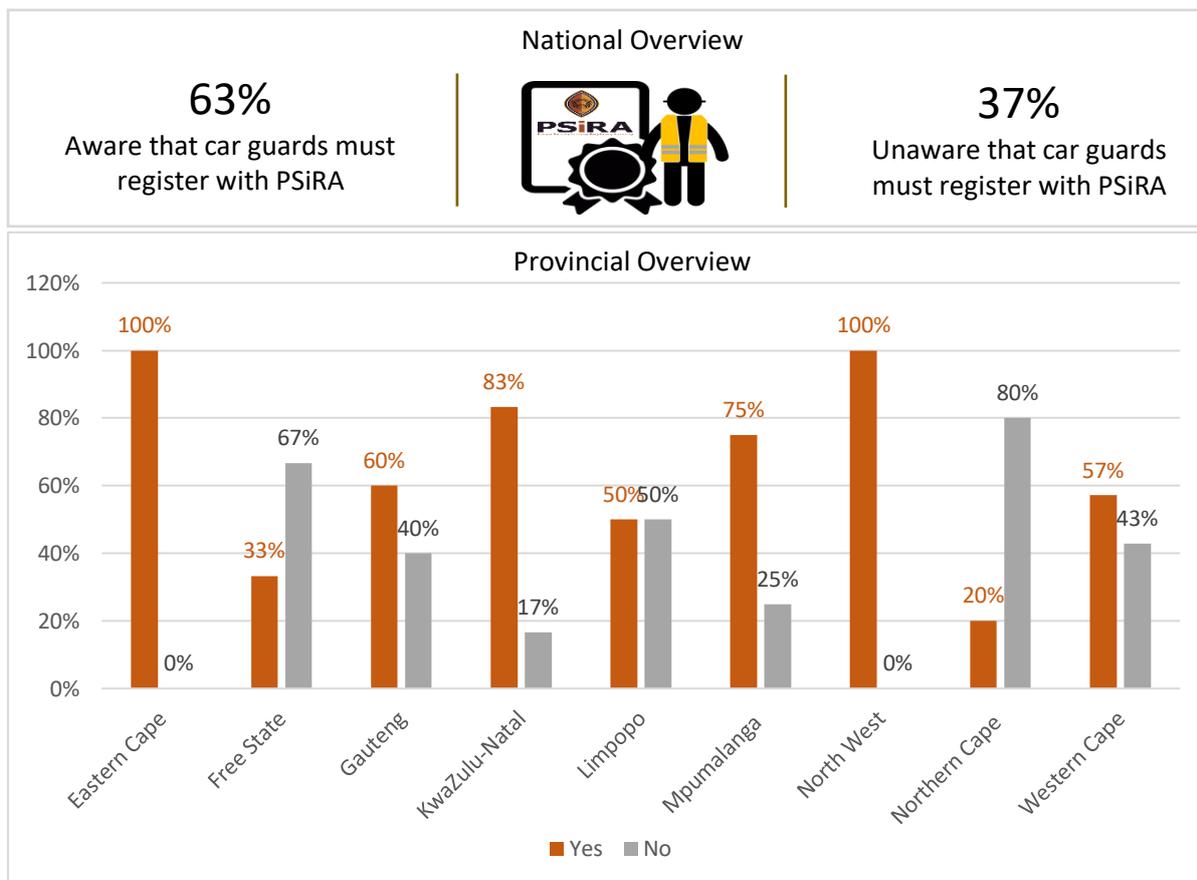
4.2 Group Two: Shopping Centre Managers

The second part of the study involved surveying entities that employ car guard or watch services at various retail facilities across South Africa were targeted as the second group of respondents for the research. The findings for this group are presented below.

4.2.1 PSiRA Registration Awareness

It is important establish the overall awareness of shopping centre mangers / security managers with regards to the regulatory authority for private security. Figure 4-11 indicates the national and provincial percentage distribution on terms of the level of awareness with regards to whether respondents were aware that car guards were required to register with the Private Security Industry Regulatory Authority.

Figure 4-11: Awareness of Car Guard Registration by Managers



A question was posed to shopping centre managers to determine whether they were aware that car guards were required to register with PSiRA. Most of the respondents (63%) indicated that they were aware of this, whereas only 37% indicated that they were unaware that car guards had to register with PSiRA. The level of awareness of PSiRA registration was highest in Eastern Cape and North West, with 100% in both provinces. Approximately 80% of the respondents in Northern Cape indicated that were unaware that car guards were required to be registered with PSiRA. In Free State approximately 67% of the respondents were also unaware of this.

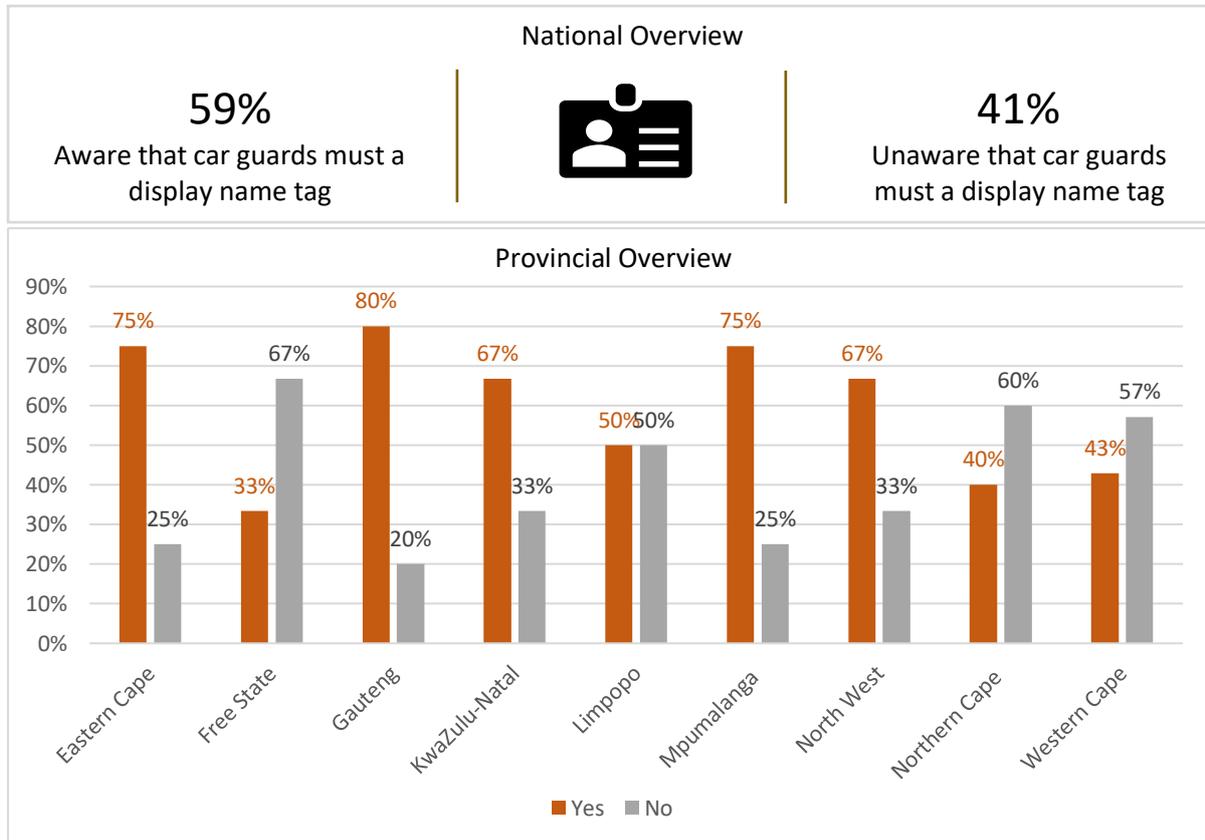
In comparison to consumers, most of the shopping centre managers were aware that car guards were required to register with PSiRA. This may be attributed to car guards operating at various retail facilities and centre managers would be required to comply with certain security regulations.



4.2.2 Name Tags with Registration Details

As mention earlier, PSiRA requires car guards to be registered with them to assist with the identification of security personnel. Figure 4-12 indicates the national and provincial percentage distribution in terms of the level of awareness of car guards being required to display a name tag with their PSiRA registration details.

Figure 4-12: Display of Name Tags



A question was posed to shopping centre managers determine whether they were aware that car guards were required to display a name tag with their PSiRA registration number and the security company they are working for. Approximately 59% of the respondents indicated that they were not aware of this, whereas 41% indicated that they were aware. The level of awareness of car guard name tags was highest in Gauteng with approximately 80% followed by Eastern Cape and Mpumalanga with 75%. Overall most of the respondents in the different provinces were aware that car guards were required to display a name tag with their registration details.

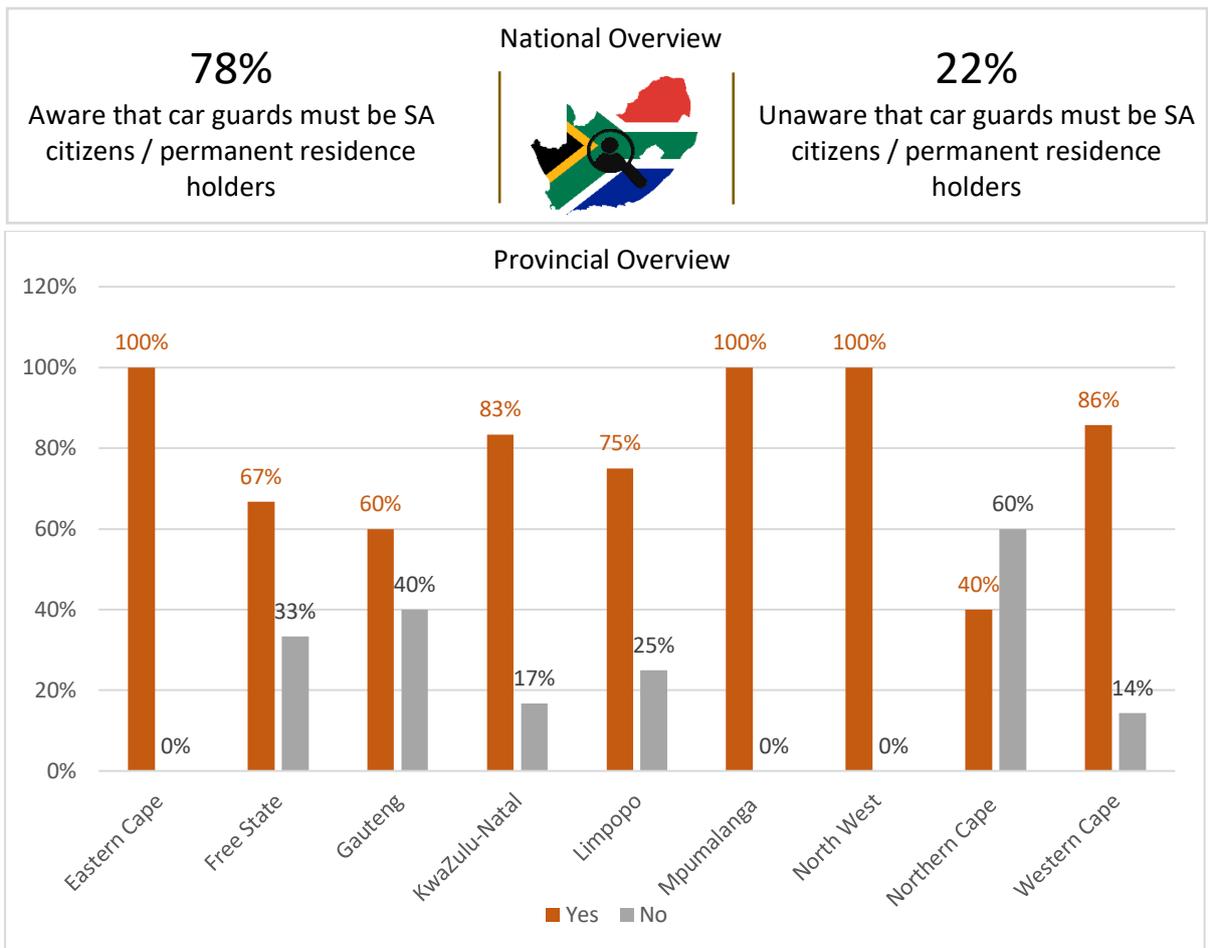
In comparison to consumers, most of the shopping centre managers were aware that car guards were required to display a name tag with their PSiRA registration number and the security company they are working for.

4.2.3 Citizenship of Car Guards

PSiRA specifies that for one to provide a car guarding service and be registered with PSiRA, they must either have South African citizenship or have Permanent Residency in South Africa. Figure 4-13 indicates the national and provincial percentage distribution in terms of level of awareness of the respondents with regards to car guard citizenship.



Figure 4-13: Citizenship of Individuals Providing Car Guarding Service



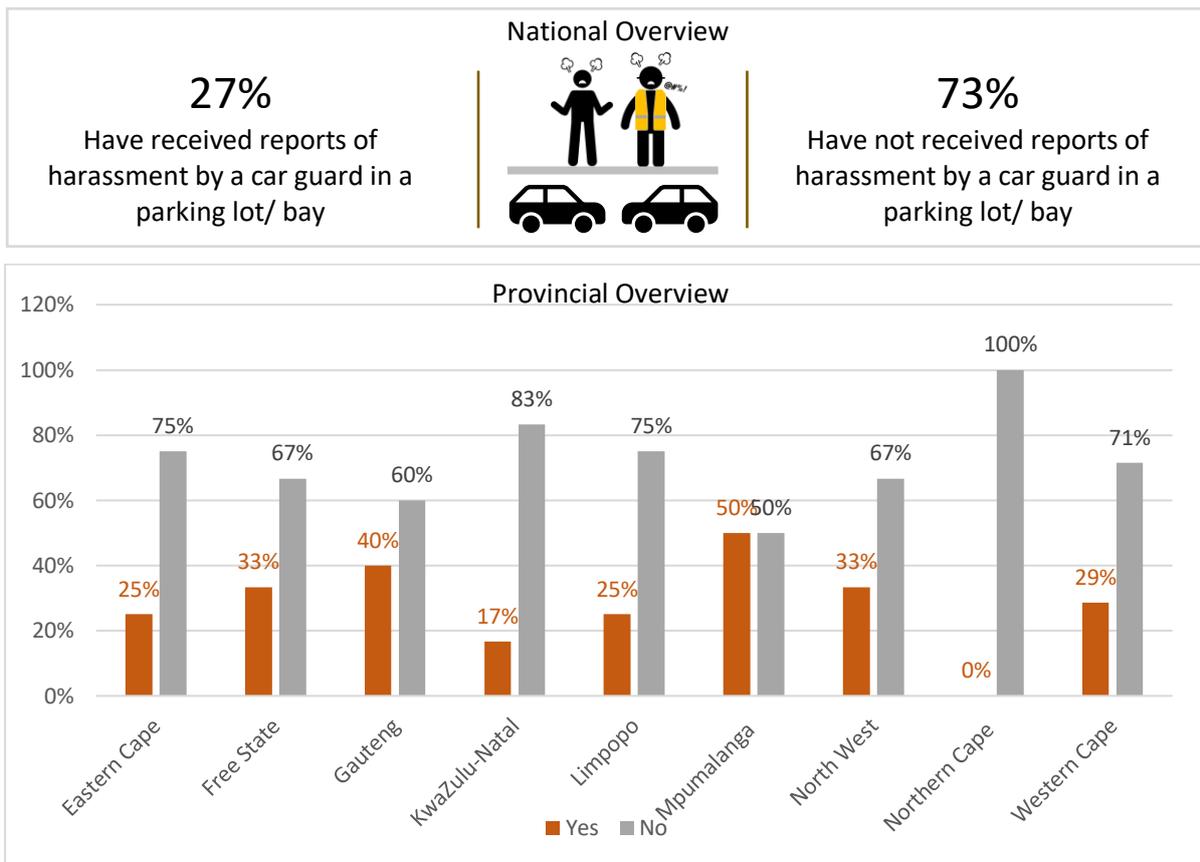
A question was posed to shopping centre managers to determine whether they were aware that for one to provide a car guarding service and be registered with PSiRA, they must either be a South African citizen or South African Permanent Residence Holder. Approximately 78% of the respondents were aware of this requirement for car guards, whilst only 22% indicated that they were unaware of this. Respondents from Eastern Cape, Mpumalanga and North West had the highest level of awareness (100%), whereas in the Northern Cape approximately 60% of the respondents indicated that they were unaware that car guards had to have South African citizenship or permanent residency.

4.2.4 Reports of harassment

The prevalence of harassment of drivers by car guards in parking lots or bays was investigated. Therefore, respondents were asked to indicate whether consumers had reported or been subjected to harassment by a car guard. Figure 4-14 indicates the national and provincial percentage distribution with regards to whether respondents had received reports of harassment by consumers against car guards.



Figure 4-14: Repts of Harassment



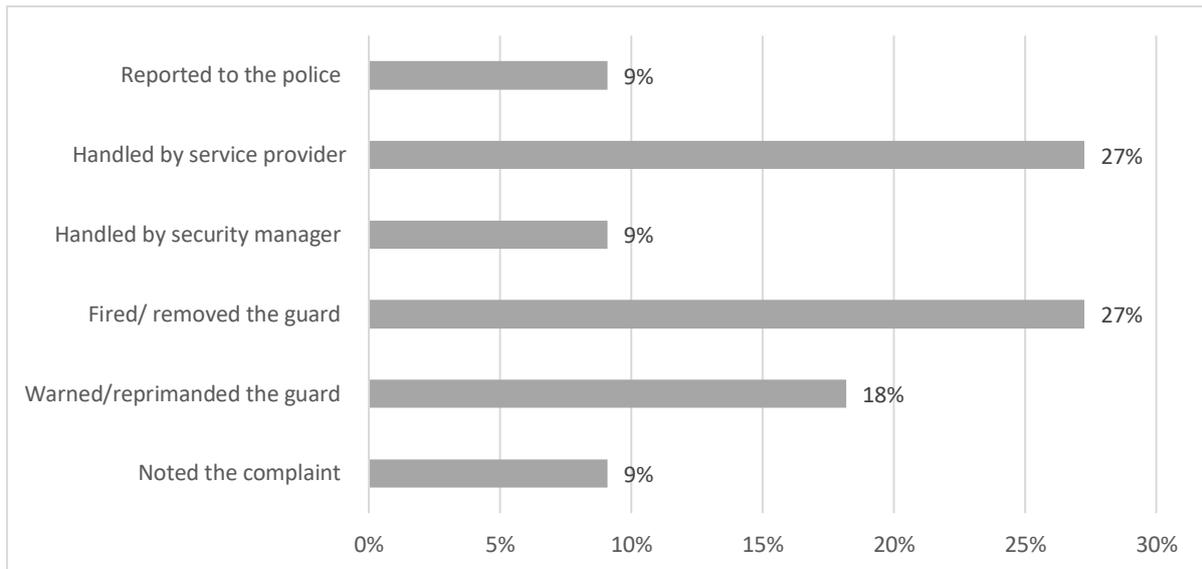
A question posed regarding whether respondents had received reports of consumer being subjected to harassment by a car guard in parking lots or bays. From a national perspective, most of the respondents (73%) indicated that they had not received reports of consumers being subjected to harassment, whereas 27% indicated that some consumers had reported being harassed by car guards. However, in Mpumalanga approximately 50% of the respondents had received harassment reports.

When comparing both the consumers and shopping centre managers, the findings were similar with the majority not having been subjected to harassment or received reports of car guards harassing consumers at the different shopping centres. However, there were instances of harassment that were noted specifically in Gauteng, Mpumalanga, Western Cape and Eastern Cape.

From the respondents who had received reports of harassment by the car guard, a question was posed to them to indicate the steps they took to address the harassment. Figure 4-15 provides a national overview of the steps taken by respondents to address the harassment.



Figure 4-15: Steps Taken by Managers to Address Harassment



Based on the data above, the predominate action taken against car guarded that were reported to have harassed consumers, most of the respondents indicated that they had the car guard removed from the premises or that they took the matter up with their service provider, with approximately 27% for each respectively. Approximately 19% of the respondents chose to warn or reprimand the car guard. The remaining 27% is split between respondents who took one of the following actions, (1) reported incident to the police, (2) raised the matter with the security manager or (3) noted the complaint accordingly. This suggests that managers do take issues of harassment seriously. Given that the nature of the harassment has not specified this may be a possible reason why the steps taken by the respondents vary.

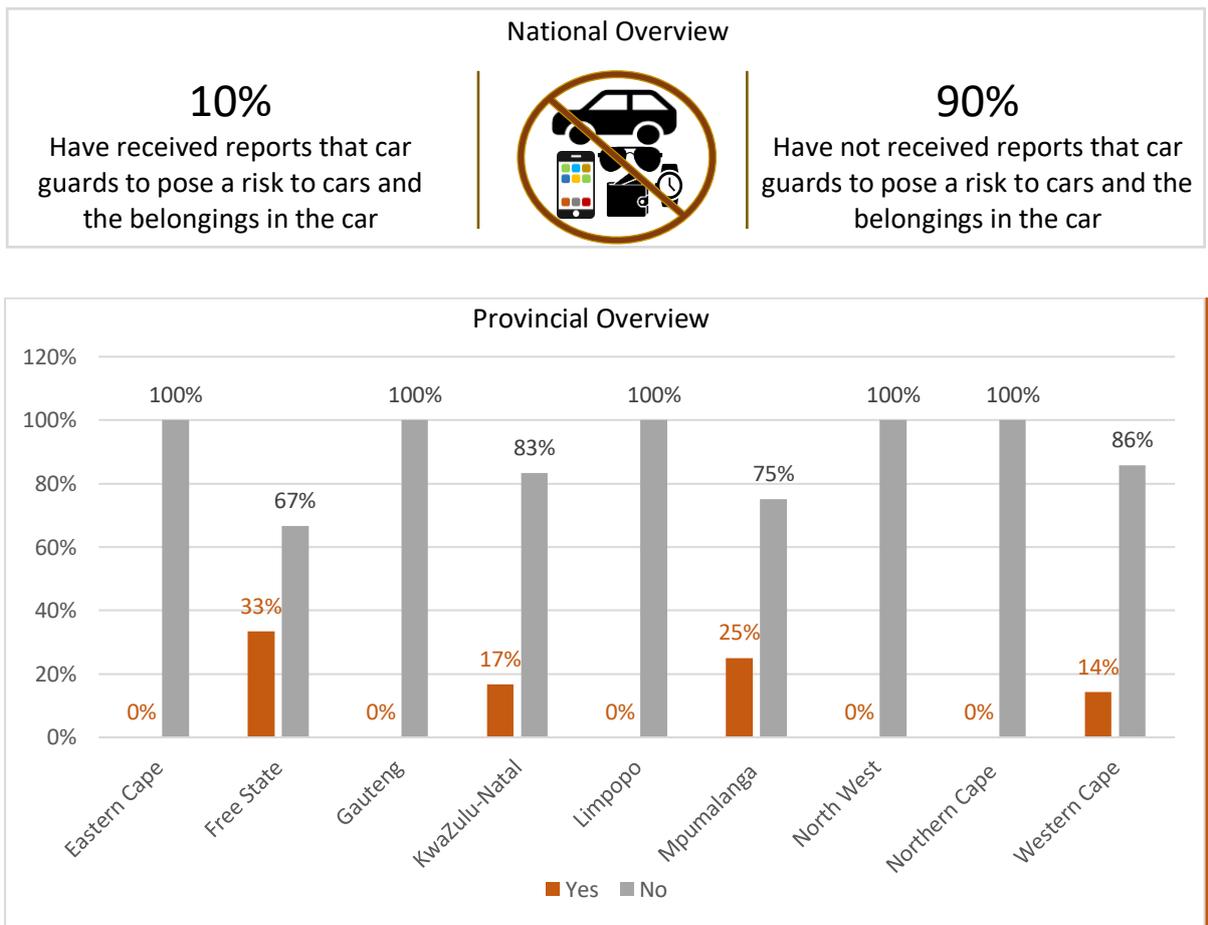
In comparison to the consumers who indicated that they had been subjected to harassment, where the majority of them did not take any action, the shopping centre managers who received reports to action against the car guard. Therefore, this may suggest that if consumer were to report incidences to the centre management or local police, the likelihood of future harassment by car guards would decrease as the offenders would be held accountable and the appropriate legal action taken.

4.2.5 Reports of Perceived Risk Posed by Car Guards

Car guards serve to watch over a consumer’s car and deter any potential car thieves. However, some may suggest that car guards, actually pose a risk to consumers’ cars. Therefore, shopping centre managers were asked to indicate whether they had received reports from consumer regarding the perceived risk posed by car guards. Figure 4-16 indicates the national and provincial percentage distribution of reports of possible risk posed by car guards to consumers’ cars.



Figure 4-16: Reports of Perceived Risk Posed by Car Guards



From a national perspective, most of the respondents (90%) indicated that they had not received reports from consumer who indicated that car guards to pose a risk to their car, whereas only 10% had received complaints in this regard. In the Free State province, approximately 33% of the respondents noted that consumer found that car guards do pose a risk to their cars. The respondents from Mpumalanga also revealed similar perception with 25% respectively. However, most of the respondents in the remaining provinces had not received complaints that car guards are a risk to their cars.

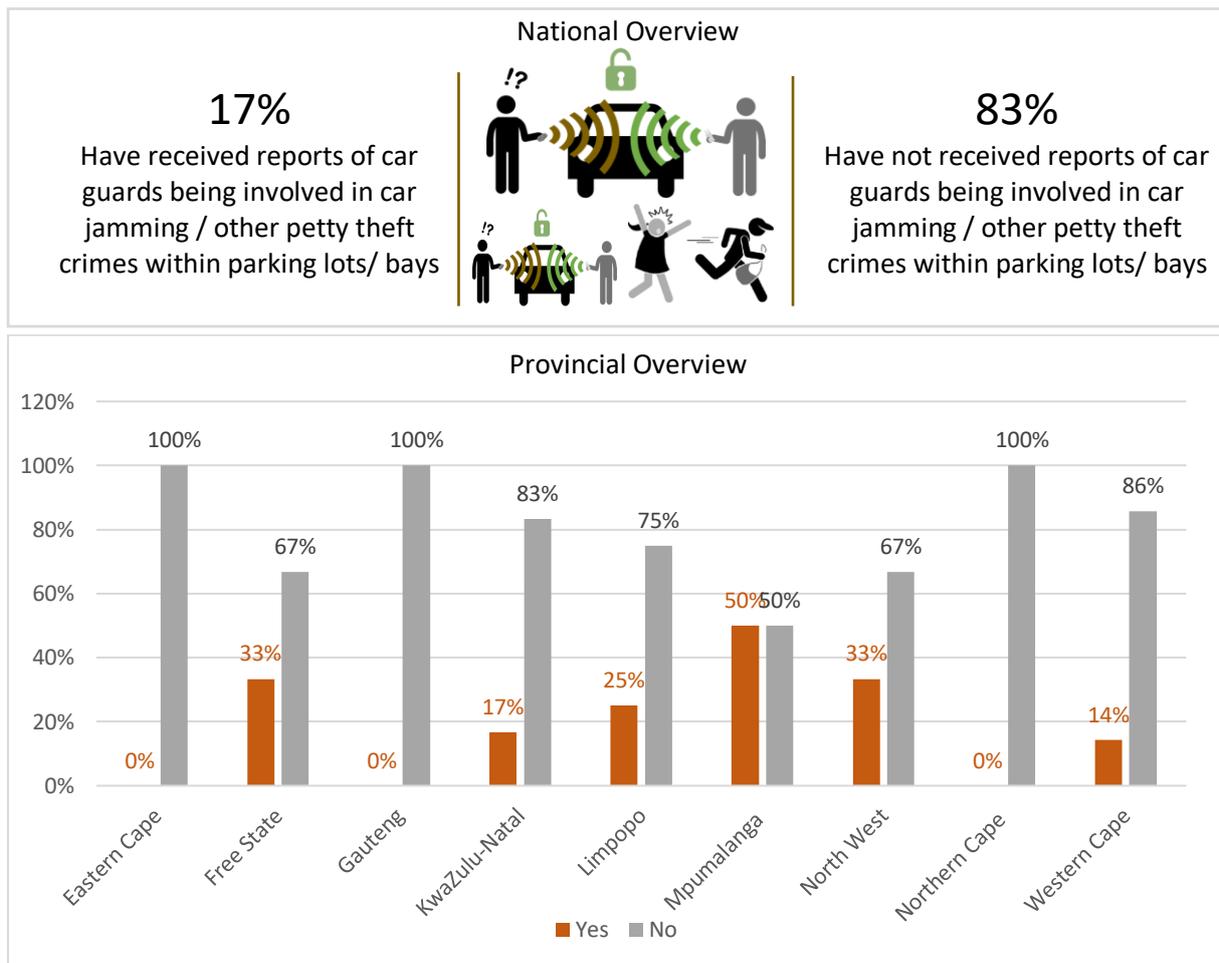
In comparison to consumers, where 35% felt that car guards pose a risk to their car or to the belongings in their car, shopping centre managers had received very few reports of such. This may suggest that consumer may feel uneasy leaving their cars with car guards but are not reporting their concerns to centre managers.

4.2.6 Reports of the Involvement of Car Guards in Crime

A question was posed to shopping centre managers regarding whether they had received any reports that car guards had been involved in crimes. Figure 4-17 indicates the national and provincial percentage distribution in terms of whether consumers had reported experiencing car guards being involved in car jamming or other petty theft crimes.



Figure 4-17: Reports of the Occurrence of Crimes by Car Guards



From a national perspective, approximately 83% of the respondents indicated that they had not received any reports of car guards being involved in a car jamming or other petty theft crime within parking lots/ bays, whilst 17% indicated that they had received such reports. From a provincial perspective, approximately 50% of the respondents in Mpumalanga indicated that they had received complaints in this regard. Approximately 33% of the respondents in Free State and the North West also received reports of car guards being involved in crimes.

When comparing both the consumers and shopping centre managers, the findings from a national overview were similar with the majority not having experienced or received reports of car guards being involved in car jamming or other petty theft crimes in parking lots or bays. However, there were instances of reported in that were noted specifically in Mpumalanga, Free State and North West.

4.2.7 Additional Centre Management Inputs

Various shopping centre managers throughout the country were approached to participate in the research, however some managers chose not to participate in the study. These managers did provide reasons for not participating, which are explained below.

- **Did not have car guards:** Some of the shopping centre managers indicated that they did not employ or make use of any car guard or car watch services at their centres.
- **Paid parking mall:** Other shopping centre managers explained that given that they were a paid parking mall in which consumers pay for parking based on the number of time spent at the



mall, car guarding not provided and that a security contractor is appointed to deal with overall security at the mall.

- **Stopped using car guards:** A few managers indicated that they had previously made use of car guards, however they stopped using car guards at the centre because they felt that this particular business model applied by the companies that provide/ employ car guards was unethical.
- **Use parking attendants:** It was also indicated that some centres make use of parking attendants that assist consumers with parking related matters.
- **Use customer assistants:** It was explained that certain centres make use of customer assistants in the parking areas who are primarily used to provide assistance to customers with their shopping parcels, trolleys, prams and wheelchairs.

It is important to note that various types of shopping centres were approached to form part of the survey, however the size and type of these centres differed. This suggests not all shopping centres require car guard services and that the findings are not a fully representative of all shopping centres in the country.

4.2.8 Managers Suggestions

Shopping centre managers were also asked to provide additional comments with regards to car guards. These comments and suggestions have been summarised below.

4.2.8.1 Value Added Service at Centres

Some of the respondents indicated that car guards add a useful extra service at shopping centres and provide individuals the opportunity to earn a living and support their families. Respondents also indicate that having car guarding services helps improve safety and security at the various centres. One of the comments shared by a respondent is noted on the subsequent page.

“Car Guard Services is essential and provide shoppers with a certain level of comfort regarding the safety of their vehicles. Shoppers are at times, however their own worst enemy by not ensuring that their vehicles are locked and that valuables are not left in full sight in vehicles – Centre Manager from KwaZulu-Natal.

Centre managers that employ car guards consider them to add certain value to the centre and the customers shopping experience in general. Car guards and security guards from part of the centres and may serve as ambassadors of the centre if they are well trained both in security and customer relations.

4.2.8.2 Implications of PSiRA Regulations

Concerns were raised by some respondents with regards to PSiRA regulations, specifically in terms of the citizenship. To this effect, some respondents indicated that most of the car guards that were employed at their centres were foreign nationals and that this may pose issues in terms of ensuring that they are regulated through criminal clearances checks. Another respondent noted that this would suggest that foreign nationals would be required to obtain work permits to be registered. One respondent felt that the PSiRA’s registration process and training was to some extent unnecessary and could be done internally by the shopping centre management.



4.2.8.3 No Car Guards Employed

The remaining comments were mostly of respondents indicating that they did not employ or make use of any car guard or car watch services at their centres. Some of the centres employ security guards as oppose to car guards.

The additional comments noted provide valuable insight into the overall perception of car guards from consumers that utilise car guard / watch services in South Africa. A summary of the comments from group one and two is presented in Table 4-1.

Table 4-1: Overview of consumer comments

Group 1: Ordinary Consumers 	Group 2: Shopping Centre Managers 
<ul style="list-style-type: none"> • Car guards provide valuable service • Car guards provide an unnecessary service • Inappropriate behaviour by car guards for not tipping and double paying • Risk of damage to vehicles by car guards • Unable to identify car guards • Poor communication and lack of training of car guards 	<ul style="list-style-type: none"> • Car guarding provides a value-added service at centres • Implication of PSiRA regulations for car guards • Some centres do not employ car guards

From the overall consumer comments, there seems to be an underlying contradiction, which could be attributed to the difference experiences that consumers have been involved with between the formal and informal car guard markets. Consumers tended to have a more positive perception of car guards that were formally employed at various shopping centres across the country, whilst informal car guards were perceived in a more negative light. This suggests confusion and differing opinions relating to formal and informal car guards respectively, as consumers are not able to differentiate between the two. Hence a number of consumers noted that they were not able to identify car guards and that some car guards demonstrated poor service and lack of training. Therefore, the informal car guard industry, where car guards are not regulated, registered or adequately trained in security and customer service, may be negatively influencing the overall perception of car guards by consumers.

From group three, there were no additional comments noted from municipalities relating to car guards. The next subsection presents the findings for group three, which consists of the six municipalities that were approached participated in the research and the input received one of the municipal representatives that participated in the survey.



4.3 Group Three: Municipalities

The final aspect of the study involves municipalities as consumers of car guard or watch services. This research aimed to include input of municipal officials and security managers responsible for security and parking at the selected municipalities. These municipalities were selected based on previous knowledge of car guards being utilised at the different municipal offices.

Six municipalities were initially selected to form part of the research, which are listed below:

1. City of Johannesburg Metropolitan Municipality
2. City of Tshwane Metropolitan Municipality
3. JB Marks Municipality (Potchestroom and Ventersdorp)
4. City of uMhlathuze Local Municipality
5. AbaQulusi Local Municipality
6. Ugu District Municipality and Ray Nkonyeni Local Municipality

These municipalities are mainly located in Gauteng, North West and KwaZulu-Natal. The municipalities were contacted for their input regarding car guard or watch services. However, there was a very low response rate in terms of actual participation in the survey, as only one municipality completed the survey.

Whilst conducting the survey it was indicated that both the City of Johannesburg Metropolitan Municipality and the City of Tshwane Metropolitan Municipality is in the process of replacing security guards at their municipal offices. The representatives from the municipalities explained that the Metro Police Departments were responsible for safety and security at the municipalities. The Metro Police have recently begun the process of taken over the security services at the municipal buildings, with new recruits for the Metro Police as part of their training. Recruits that require further training would be used a temporary security guards to gain the required skills of the Metro Police. Media reports note that the insourcing of security guards programme is aimed at reducing costs for the municipalities.

The municipal representatives from Ugu District Municipality and Ray Nkonyeni Local Municipality indicated that they did not employ car guards at their municipal offices and could not participate in the survey. The municipal representatives from JB Marks Municipality and the AbaQulusi Local Municipality could not be reached, despite numerous attempts to contact the municipality and have a representative from the public safety and security department give their input. Table 4-2 presents a summary of the responses form the selected municipalities.

Table 4-2: Summary of Group Three Responses

No	Name of Municipality	Province	Response
1.	City of Johannesburg Metropolitan Municipality	Gauteng	Metro Police
2.	City of Tshwane Metropolitan Municipality	Gauteng	Metro Police
3.	JB Marks Municipality	North West	Unavailable
4.	City of uMhlathuze Municipality	KwaZulu-Natal	Participated
5.	AbaQulusi Local Municipality	KwaZulu-Natal	Unavailable
6.	Ugu District Municipality – Ray Nkonyeni Local Municipality	KwaZulu-Natal	No Car Guards



A municipal representative from the City of uMhlathuze Local Municipality which is located in KwaZulu-Natal, provided input with regards to car guard or watch services at the municipality, which is discussed below.

4.3.1 Awareness of PSiRA

A question was posed to the municipal representative with regards to whether he was aware that car guards were required to register with PSiRA, to which the respondent indicated that he was aware of this. The respondent indicated that he was unaware that car guards were required to display a name tag with their PSiRA registration number and the security company that they are working for, or that in order to provide a car guarding service, they must either be a South African Citizen or a South African Permanent Residence holder.

4.3.2 Reports against Car Guards

Questions related to whether anyone had ever reported or been subjected to harassment by a car guard in parking lot or bay or reported car guards for being involved in car jamming or other petty theft crimes were posed. The respondent indicated that he had not received any official reports or complaints with regards to car jamming and other petty theft crimes.

The respondent however indicated that some individuals had noted that car guards pose a risk to their cars, including the belongings contained in their cars. This suggests that consumers have the perception that car guards pose a risk to their cars and their belongings in parking lots around municipal buildings, although no petty theft crimes have been reported to the municipal security management by consumers.

The respondent added that the municipality could not control car guards, which may suggest that consumers park at their own risk and the municipality cannot be considered liable for any theft or damage to property.

4.3.3 By-Laws Related to the Control of Parking Attendants/ Car Guards

The council for the City of uMhlathuze Local Municipality has compiled by-laws relating to the control of parking attendants/ car guards. These by-laws contain definitions, activities, demarcated areas, registration, duties, offences and penalties with regard to car guarding at the municipal offices.

According to the City of uMhlathuze Local Municipality's by-laws, a parking attendant/ car guard means "a person who, whether for fixed or agreed remuneration or benefit, or otherwise, offers a service of guarding or protecting one or more vehicles in a demarcated area, or guiding or assisting persons desirous of parking or removing their vehicles from such demarcated area in entering or leaving any parking space or place".

The by-laws indicate that the council may appoint administrators to oversee and co-ordinate the activities of parking attendants and car guards in demarcated areas based on the terms and conditions the Council may agree upon with such administrators. The by-laws also indicated the requirements for registration as a parking attendant / car guard as follows:

No person shall operate as a parking attendant/car guard unless he or she –

- a) has applied to an approved administrator for registration as a parking attendant/car guard in the area and has been approved as a parking attendant by such approved administrator;*
- b) at all times carries a clear identification card in a format to be prescribed by Council from time to time;*



- c) wears a uniform/bib approved by Council, which clearly distinguishes between parking attendants/car guards and authorised officers.

Based on the by-lays complied by the City of uMhlatuze Local Municipality in relation to the control of parking attendants/ car guards, the municipality is aware of the requirements of registration. However, the municipality may opt to outsource the management of car guards to an approved administrator – which may be “any person or entity approved by Council as an administrator and co-ordinator of parking attendants and/or car guard activities in relation to any demarcated area”. This correlates with the response given by the representative from the municipality, that they do not employ car guards or that they may have outsourced this service to an approved administrator.

The analysis of the municipal aspect of car guard or watch services, although very limited does give some insight into the nature of car guarding at such spaces. More specifically, that some municipalities do not employ any car guards, whilst other municipalities have opted to outsource the function to the Metro Police.

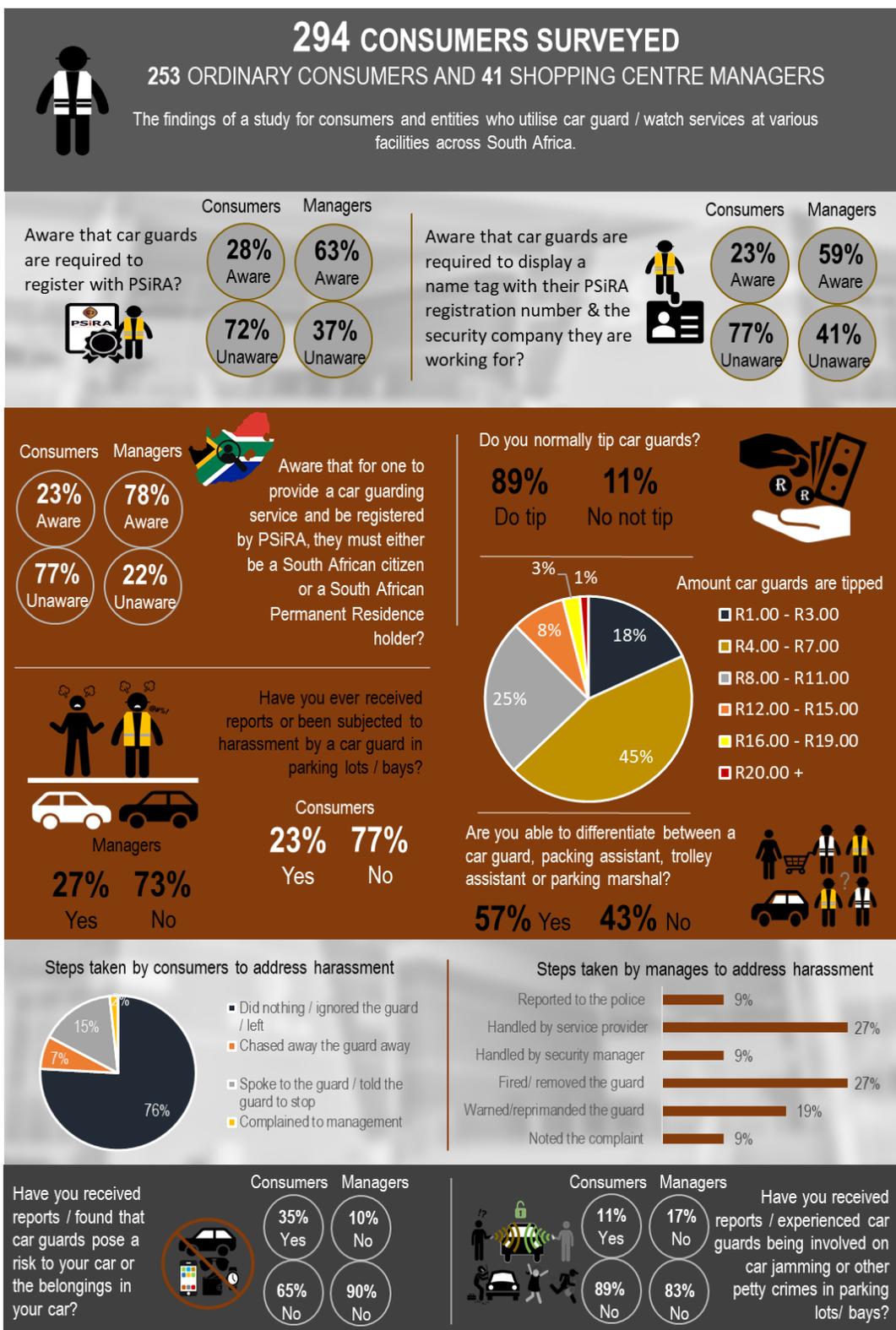
The next section provides an infographic summary of the research findings for the different groups surveyed.



5. Summary

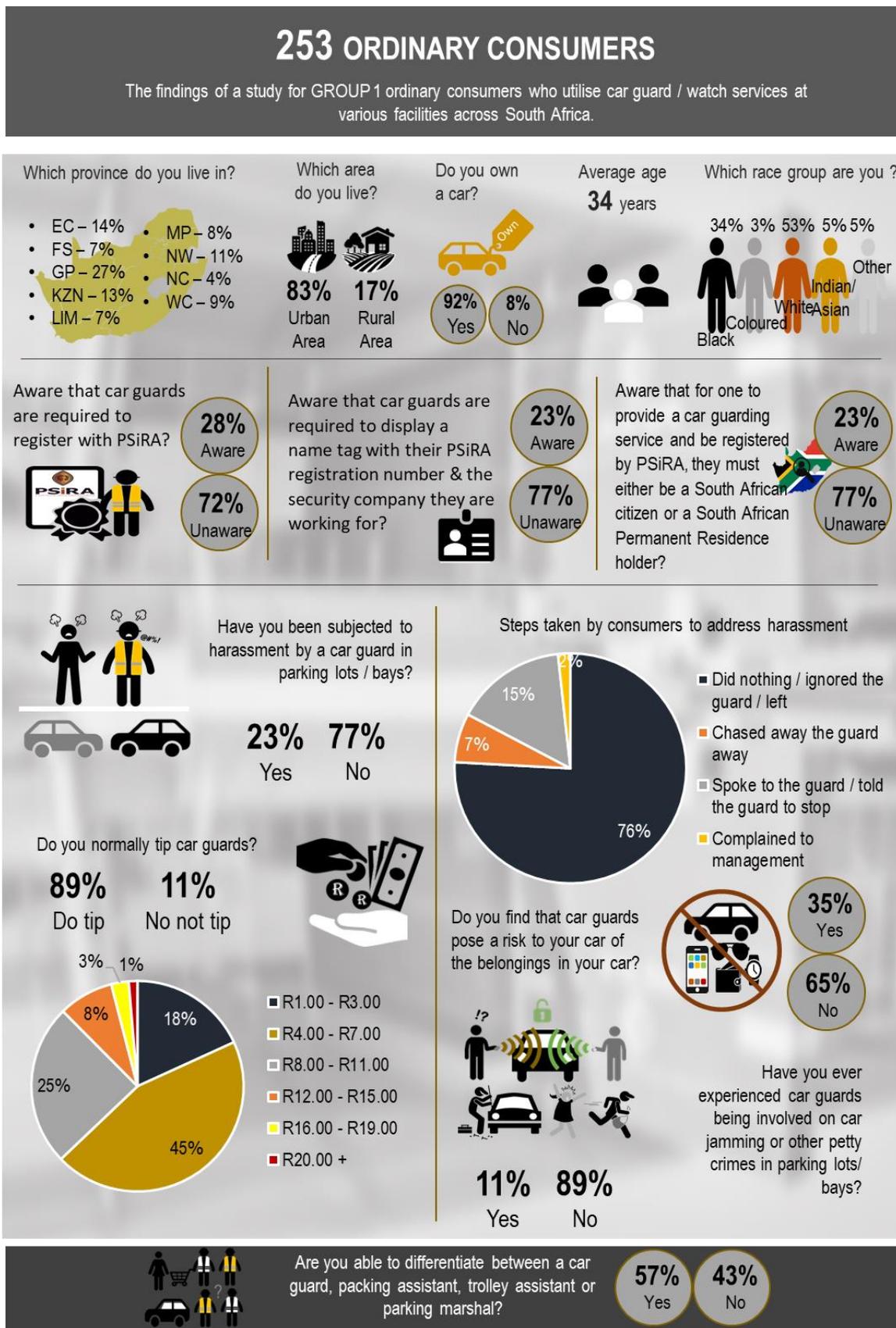
This section provides an infographic summary of the key findings from the car guard or watch survey conducted with ordinary consumers and shopping centre managers throughout South Africa, which is illustrated in Diagram 5-1.

Diagram 5-1: Summary of Consumers Surveyed



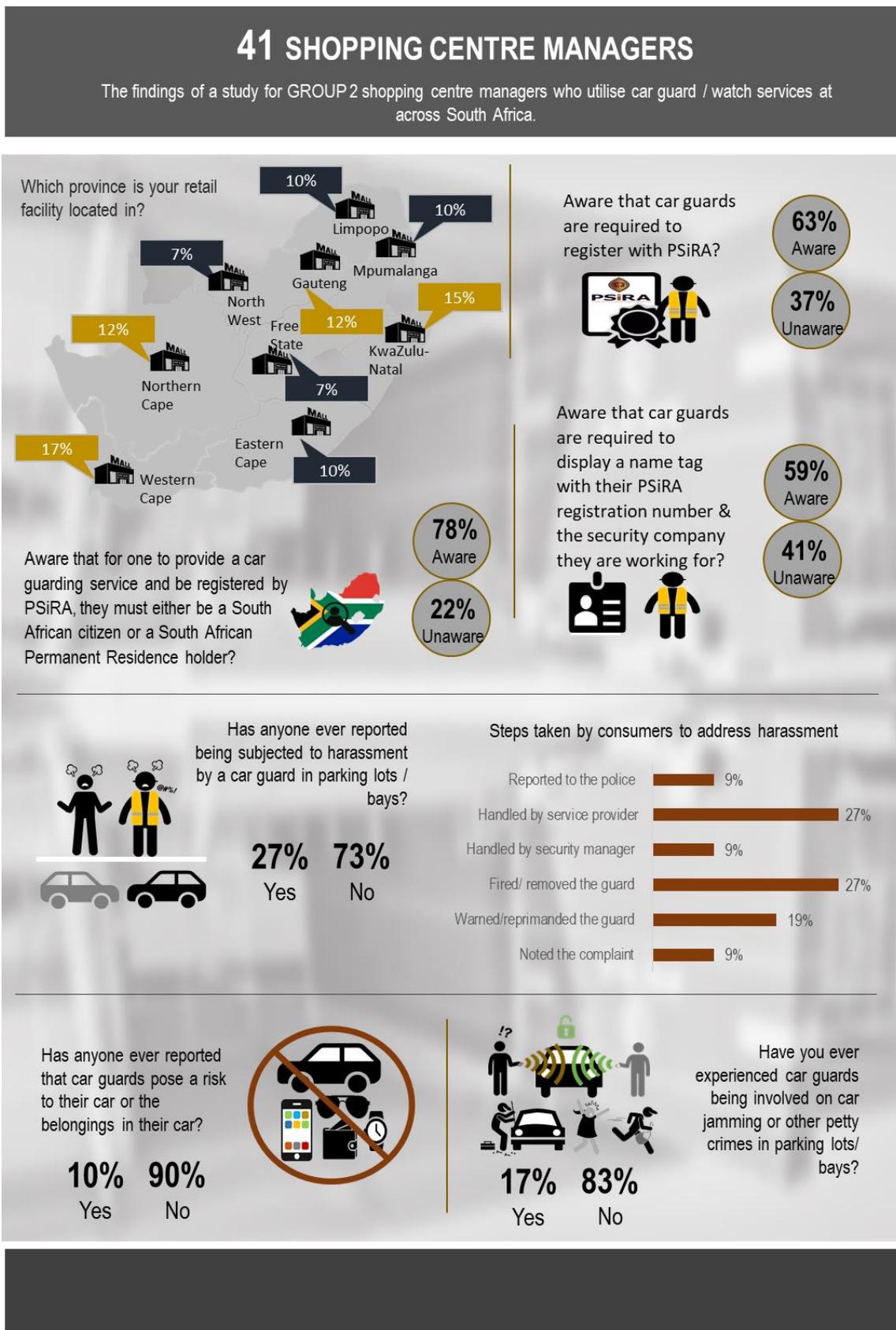
An infographic summary of the key findings of survey from ordinary consumers of car guard or watch services is illustrated in Diagram 5-2.

Diagram 5-2: Summary of Ordinary Consumers Surveyed



An infographic summary of the key findings of survey from shopping centre managers that utilise car guard or watch services is illustrated in Diagram 5-3.

Diagram 5-3: Summary of Shopping Centre Managers Surveyed



6. Overall Recommendations

Based on the survey responses and additional comments the following recommendations should be considered in order to help improve the perception and awareness car guards by consumers, shopping centre managers and municipalities. Table 6-1 presents the overall recommendations based on the survey findings.

Table 6-1: Overall Survey Recommendations

Recommendation	Description
<p>1. Awareness Campaign</p> 	<p>Based on the low level of awareness of the Private Security Industry Regulatory Authority by group 1 consumers, it is recommended that PSiRA consider embarking on an awareness campaign. This should be targeted at informing various consumers of the PSiRA regulations with regards to car guard registration, identification requirements and citizenship. Advertising/marketing on online, social media platforms and around areas where car guards operate – specially at public spaces and parking lots should form part of the awareness campaign.</p>
<p>2. Professional Attire/ Uniform</p> 	<p>Based on the responses, car guards should be provided with a uniform and name tag to ensure that they are easily identifiable. Consideration must also be taken to assist consumers with the differentiation of the various services provided at shopping centres, in order to allow separate packing assistants, trolley assistants and parking marshals from one another. Uniforms or different coloured reflector jackets, the name tags and job title may be used.</p>
<p>3. Training</p> 	<p>Providing car guards with adequate skills training in security as well as in customer service. This should be aimed at improving communication between consumers and car guards.</p>

6.1 Further Research

From the research findings, there seems to be a contradiction between the formal and informal car guard market. Consumers tended to have a more positive perception of car guards that were formally employed at various shopping centres across the country, whilst informal car guards were perceived more negatively.

Further research needs to be conducted to understand this contradiction and explore methods of regulating the informal car guard industry where most of the car guards are not regulated, registered or adequately trained in security and customer service. The research should focus on the perceptions of formal versus informal car guards by consumers, in order to understand whether the perceived risk, incidences of harassment, car jamming and petty theft crimes are from formally employed/ registered car guards or informal car guards.



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