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Am bob ymholiad ynglŷn â'r agenda hwn cysylltwch â Cath Forbes-Thompson
(Tel: 01443 864279 Email: forbecl@caerphilly.gov.uk)

Dyddiad: Dydd Gwener, 15 Gorffennaf 2016

Annwyl Syr/Fadam,

Bydd cyfarfod **Grŵp Gorchwyl Meysydd Parcio Cyngor Bwrdeistref Sirol Caerffili** yn cael ei gynnal yn **Ystafell Sirhywi, Tŷ Penallta, Tredomen, Ystrad Mynach** ar **Dydd Iau, 21ain Gorffennaf, 2016** am **10.00 am** i ystyried materion a gynhwysir yn yr agenda canlynol..

Yr eiddoch yn gywir,

Chris Burns

Chris Burns
PRIF WEITHREDWR DROS DRO

A G E N D A

Tudalennau

1 I benodi Cadeirydd ac Is-gadeirydd.

2 I dderbyn ymddiheuriadau am absenoldeb

3 Datganiadau o Ddiddordeb.

Atgoffi'r Cynghorwyr a Swyddogion o'u cyfrifoldeb personol i ddatgan unrhyw fuddiannau personol a/neu niweidiol mewn perthynas ag unrhyw eitem o fusnes ar yr agenda hwn yn unol â Deddf Llywodraeth Leol 2000, Cyfansoddiad y Cyngor a'r Cod Ymddygiad ar gyfer Cynghorwyr a Swyddogion

I dderbyn ac ystyried yr adroddiad(au) canlynol:-

4 Adolygiad sir gyfan o weithred a rheolaeth eiddo meysydd parcio priffyrdd y Cyngor.

1 - 102

5 Statws Presennol y Trosolwg Strategol, Cyfundrefn Parcio a Thariffau.

Cylchrediad:
Cynghorwyr Mrs E.M. Aldworth, J. Bevan, D.T. Davies, N. Dix, C. Elsbury a R.W. Gough,

A Swyddogion Priodol.

REGENERATION & ENVIRONMENT SCRUTINY COMMITTEE – REVIEW OF CCBC CAR PARKS TASK AND FINISH GROUP – 21ST JULY 2016

SUBJECT: COUNTYWIDE REVIEW OF THE OPERATION AND MANAGEMENT OF HIGHWAY OWNED COUNCIL CAR PARKS

REPORT BY: ACTING DIRECOR OF CORPORATE SERVICES & SECTION 151 OFFICER

1. PURPOSE OF REPORT

1.1 To consider and agree the terms of reference, methodology for review and proposed work programme for the CCBC Highway Owned off street Car Parks Review Task and Finish Group.

2. SUMMARY

2.1 This report outlines the suggested terms of reference for the task and finish group and proposed work programme for meetings of the review group.

3. LINKS TO STRATEGY

3.1 The operation of scrutiny is required by the Local Government Act 2000 and subsequent Assembly legislation.

4. THE REPORT

4.1 Attached to this report are the following documents for consideration:

- Regeneration & Environment Scrutiny Committee Report 29th March 2016 (appendix 1). Members to consider para 4.13.1 to be the scope of the review.
- Welsh Government Report – Relationships between car parking charges and town centre footfall (appendix 2).
- Proposed task and finish group work programme and methodology (appendix 3).

4.2 Members are advised that task and finish groups can invite key stakeholders as expert witnesses to attend specific or all meetings. Involving key stakeholders can broaden the range of views and expertise available to a task and finish group and also demonstrate that the review group has engaged with representative groups and individuals.

4.3 The terms of reference to be as follows:

The aim of the task and finish group is to determine if the current strategy and regime for the management and operation of the Council's Highway owned off street car parks is still appropriate and what alternative or additional options should be considered in the future.

5. EQUALITIES IMPLICATIONS

5.1 This report is for information purposes, so the Council's EqIa process does not need to be applied.

6. FINANCIAL IMPLICATIONS

6.1 There are no financial implications in this report.

7. PERSONNEL IMPLICATIONS

7.1 There are no personnel implications in this report.

8. CONSULTATIONS

8.1 There are no consultation responses that have not been contained in this report.

9. RECOMMENDATIONS

9.1 Members are asked to consider the information attached to this report and agree the terms of reference and methodology for the review.

10. REASONS FOR THE RECOMMENDATIONS

10.1 To allow members to consider the proposed terms of reference and work programme.

11. STATUTORY POWER

11.1 Section 21 of the Local Government Act 2000.

Author: Catherine Forbes-Thompson, Interim Head of Democratic Services.
Consultees: Christina Harrhy, Corporate Director, Communities
Nicole Scammell, Acting Director Corporate Services & Section 151 Officer
Gail Williams, Interim Head of Legal Services and Monitoring Officer
Terry Shaw, Head of Engineering Services
Clive Campbell, Transportation Engineering Manager
Dean Smith, Principal Engineer (Traffic Management)

Appendices:
Appendix 1 Regeneration & Environment Scrutiny Committee report – item 8
Appendix 2 Welsh Government Report– Relationships between car parking charges and town centre footfall
Appendix 3 Proposed Work Programme

REGENERATION AND ENVIRONMENT SCRUTINY COMMITTEE – 29TH MARCH 2016

SUBJECT: SCOPING OF THE COUNTYWIDE REVIEW OF THE OPERATION AND MANAGEMENT OF HIGHWAY OWNED COUNCIL CAR PARKS

REPORT BY: CORPORATE DIRECTOR - COMMUNITIES

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1. PURPOSE OF REPORT

1.1 To seek views and support from the Regeneration and Environment Scrutiny Committee on the scope of the proposed review on the operation and management of the Council's Highway owned public car parks and the potential for future changes to the current parking regime and charging tariffs.

2. SUMMARY

2.1 Following discussions on the Highway owned off street car parks related MTFP proposals at the special Regeneration and Environmental Scrutiny committee in June 2014, Members raised a number of issues related to the budget saving proposals and wider operational policy issues. Subsequently a number of related issues have also been raised by Members for which Officers have proposed the scope of a review for discussion and agreement with Members.

2.2 The following key issues are proposed to be included in the scope of the review:

- History of parking charges in CCBC
- Impact of P&D on town centres
- Consistency, equality and equity of approach
- Review of the existing tariffs and the variations between car parks and between towns
- Balance of long stay and short stay car parks
- Extension of P&D to current non P&D car parks
- Transferrable tickets
- Residential permits
- Business permits
- Trading
- Payment methods

2.3 Members views are sought on the scope of the review and the process and timescales to complete it.

3. LINKS TO STRATEGY

3.1 To work towards the Council's corporate objective of improving peoples' living environment through targeted actions, regulation, information and advice.

3.2 Engineering Division Objective: To provide safe and efficient transport and land drainage infrastructure through quality services delivered by means of cost effective management, maintenance and improvement of the networks.

3.3 The report links to the Safer and Prosperous themes of “Caerphilly Delivers”, the Local Services Board (LSB) Single Integrated Plan.

3.4 Equalities Objectives and Action Plan: Equality Objective 3 - Physical Access.

4. THE REPORT

4.1 History

4.1.1 Prior to the inception of Caerphilly County Borough Council, Twyn car park and Crescent Road car park in Caerphilly and Emporium car park in Bargoed were already subject to parking charges. In 1996 the car parks were inherited by CCBC and following a review carried out at that time parking charges were extended to a number of other public car parks in the county borough. These included Bedwas Road, Station Terrace and the long stay element of Crescent Road car park in Caerphilly, Oakfield Street in Ystrad Mynach, and all of the car parks in Blackwood that are presently subject to pay and display. Appendix 1 provides details of the parking charges as set by CCBC during its early years i.e..between1996-1998.

4.1.2 The parking charges were originally introduced in order to discourage long-term parking by workers, ensure a turn-over of parking spaces and availability for shoppers and visitors and to contribute towards the significant maintenance and operational costs associated with running the public parking facilities.

4.2 Parking Regime

4.2.1 The town centre parking regime has evolved since 1996 to provide a balance between provision for commuters, workers, shoppers and visitors. At two to three year intervals, studies of car park usage, ticket sales and income have been undertaken and when appropriate changes to the tariffs have been made. The tariffs were last changed in September 2010, which resulted in a general increase of the 2007 tariffs. Prior to 2007 the tariffs were changed in 2002. Details of the historic parking tariffs for 2002 and 2007 are provided in Appendix 2.

4.2.2 Since 1996 the number of Highway owned public car parks has increased significantly through a number of initiatives. Some have been related to improvements in public transport with the provision and expansion of rail park and ride car parks, others have been linked to regeneration projects in the key towns. A total of 83 public off-street car parks are currently managed by the Council’s Engineering Services Division as listed in Appendix 3. The location of all these car parks is shown on the plans in Appendix 4.

4.2.3 The car parks comprise the following different types of facility:

- 16 pay and display (season tickets are available for 8 of the car parks)
- 3 limited waiting (Caerphilly, Blackwood & Machen)
- 10 park and ride (free to use)
- 2 residents’ only (Blackwood)
- 1 season ticket only (Blackwood)
- 51 free to use

4.2.4 The 16 pay and display car parks are situated in the primary shopping centres of Caerphilly, Blackwood, Bargoed and Ystrad Mynach where parking charges are necessary to discourage long term parking by workers and ensure a turn-over of parking spaces and availability for shoppers and visitors, thereby contributing to town centre vitality and relieving or preventing congestion.

4.2.5 The 51 free car parks are generally located away from the main town centres and receive a lower level of usage than those facilities that are subject to parking charges.

4.2.6 A significant number (72) of the car parks are subject to the Off-Street Parking Places Orders that enable their use to be regulated and parking charges to be made. The 10 Park & Ride car parks are currently unregulated, however it is intended that Orders will be applied to these facilities in the future to improve regulation.

4.2.7 Highland Terrace (10 spaces), Gordon Road (9 spaces) and part of Libanus Road (6 spaces) in Blackwood are designated for residents' only parking. A total of 15 residents parking permits were issued for use in these car parks in 2014.

4.2.8 Season tickets can be purchased for Crescent Road, Bedwas Road and Lawrence Street car parks in Caerphilly, Libanus Road, Thorncombe 2, Thorncombe 3, Cliff Road and Courthouse car parks in Blackwood, and Emporium and St Gwladys car parks in Bargoed. In 2014 a total of 84 season tickets were issued for use in these car parks.

4.3 Legislation

4.3.1 Section 32 of the Road Traffic Regulation Act gives local authorities power to provide suitable parking places for vehicles for the purpose of relieving or preventing congestion of traffic. Section 35 (iii) allows authorities to make provision for charging for parking for off-street parking. There are no further provisions detailing how off street parking revenue should be spent nor is there case law citing the power of charging under Section 35 of the Act. Local Authorities being bodies created by statute can only act in ways in which they are authorised by statute. Since there is no specific power of revenue raising by off-street parking charges, the Council is effectively limited to spending any surplus on the provision of off-street parking for relieving or preventing congestion.

4.3.2 Section 45 of the Act gives the authority power to designate on street parking. In determining whether to designate on-street parking the authority must have regard to the free movement of traffic, access to premises, and the existence of any off-street parking within the locality. Section 46 of the Act gives power to include provision for charging for on-street parking.

4.4 Current Parking Tariffs

4.4.1 Appendix 5 provides details of the current tariffs, introduced in 2010, for all Highway owned pay and display car parks. The variation in tariffs has historically been determined by the attractiveness of the car parks (i.e. demand, location and size) and whether the facilities are aimed at short stay or long stay parking. Certainly there is seemingly a previous view that such aspects can be used to positively promote those town centres whose vitality is less than those that surround it. Historically a lower tariff has existed in Ystrad Mynach as this is the only Council owned car park in the town and there is no free to use Highway owned car park. Short stay car parks are directed towards shoppers and visitors and are generally well used. Long stay car parks are directed towards both shoppers and workers.

<u>Variation of tariffs between car parks and towns</u>

4.4.2 The long stay car parks are located on the edges of the towns in order to encourage their use by workers and commuters. This maximises the available space for shoppers in those car parks closest to the town centres.

4.4.3 Currently different tariffs exist in different towns. The highest tariff is in the Twyn car park in Caerphilly as this car park has the greatest demand within the borough, and because of its high level of demand for tourism parking charges also apply to this facility on Sundays. The lowest tariff is in Oakfield Street car park in Ystrad Mynach as this has the lowest demand and it is also the only Council owned car park in the town. The remainder of the pay and display car parks in Bargoed, Blackwood and Caerphilly town centres are set at the same level of charges for both long stay and short stay car parks.

Comparison of parking tariffs with neighbouring authorities

4.4.4 Appendix 6 provides a comparison of the Council's parking tariffs with neighbouring local authorities. Newport City Council has radically altered their approach owing to city centre redevelopment disruption and Torfaen and Blaenau Gwent CBCs do not charge. Torfaen is unusual in that its car park charging regime is dictated by that of the privately owned Cwmbran Town Shopping Centre, who decided not to charge. Merthyr CBC has recently amended its parking tariff and no longer offers a 2 hour tariff.

4.4.5 The current charging system is cheaper than in comparative neighbouring towns.

Research

4.5.6 In March 2015 MRUK Research published the findings of a study that they undertook (on behalf of Welsh Government) on the relationships between car parking charges and town centre footfall. The study took account of local authority decision making in relation to parking charges in Wales, the views of people visiting town centres across Wales, local stakeholders and examples of best proactive across the UK. The key findings, conclusions and recommendations from this study will be considered as part of this review.

Scope of Review

4.5.7 The review will need to consider:

- What are the main objectives for the Council in applying parking charges in the Council's Highway owner car parks?
- Is the current parking regime and parking tariffs across the borough still appropriate to meet these objectives?
- Is the application of current legislation still appropriate?

4.6 Enforcement

4.6.1 Regular enforcement of the public car parks is necessary to ensure that a high level of compliance of the parking regulations is maintained. Priority is given to enforcing the pay and display can parks in the main shopping centres as these facilities receive the highest level of demand. The free car parks are enforced on a less frequent basis, as and when required.

4.6.2 The following enforcement methods are employed in the public car parks:

Car Park Attendants

4.6.3 A total of 5 part-time attendants are employed by the Council's Traffic Management Section. The attendants are split into two teams covering different areas as defined below; these best reflect the enforcement requirements for each of the primary shopping centres.

- Blackwood town centre – 3 part-time attendants
- Caerphilly, Ystrad Mynach and Bargoed town centres – 2 part-time attendants

4.6.4 An additional part time member of staff is employed to open/close the gates/barriers between 08:00am-8:00pm Monday–Saturday at Wesley Road and Thorncombe Road 3 car parks in Blackwood (enforcement and the issuing of excess charge notices does not form part of this employees' duties). The night time closures were introduced as a result of anti-social behaviour and cost in the order of £5k per annum to operate. The current level of such anti-social behaviour within the car parks is minimal.

CCTV

4.6.5 CCTV cameras are installed in 13 of the 16 pay and display car parks. Appendix 3 identifies the sites where CCTV has been installed to date. In some circumstances CCTV footage can be used to generate Excess Charge Notices issued through the post to any persons who are observed to contravene the car park regulations. CCTV is particularly useful for night time enforcement when there are no Attendants on duty. The footage can also be used when investigating appeals against Excess Charge Notices as and when required.

Scope of Review

4.6.6 The review will need to consider:

- Is the current enforcement regime still appropriate to meet the Council's objectives?
- Is the current level of provision and use of the CCTV system still appropriate?

4.7 Income

Ticket Sales

4.7.1 The graph in Appendix 7 shows the annual income from ticket sales for the Council's Highway owned off street car parks since 2006/07. The decline in income in 2008/09 and 2009/10 is considered to reflect the downturn in the UK economy at its lowest point. Since then annual income has increased as signs of economic recovery have emerged. Blackwood has most of the pay and display car parks and has consistently generated the highest level of income, followed by Caerphilly, Bargoed and Ystrad Mynach. In 2014/15 the following incomes (inclusive of VAT) were achieved from ticket sales in each town centre:

- Blackwood – £438,764
- Caerphilly – £197,883
- Bargoed – £29,029
- Ystrad Mynach - £20,054

4.7.2 Since 2009/10 the income for Blackwood has increased consistently year on year indicating improved vitality in Blackwood. However the incomes from Caerphilly, Bargoed and Ystrad Mynach have remained fairly constant over the five year period (apart from a noticeable reduction in income for Bargoed and Ystrad Mynach during 2014/15).

4.7.3 The tables in Appendix 8 show the monthly/annual income from ticket sales for all car parks for financial years 2010/11 - 2014/15. A summary of the income totals from ticket sales for 2014/15 is also provided below. High Street car park in Blackwood generates the highest level of income followed by Twyn in Caerphilly. These two facilities account for approximately 50% of the total income generated from ticket sales for all Highway owned public car parks and is predominantly due to the their desirable locations. Market Traders and Court House car parks in Blackwood consistently generate the lowest levels of income due to their locations.

- High Street, Blackwood - £201,490
- Twyn, Caerphilly - £128,869
- Cliff Road, Blackwood - £49,708
- Thorncombe 3, Blackwood - £47,829
- Bus Station, Blackwood - £43,973
- Crescent Road, Caerphilly - £42,076
- Woodbine Road, Blackwood - £40,219
- Wesley Road, Blackwood - £28,717
- Oakfield Street, Ystrad Mynach - £24,054
- St Gwladys, Bargoed - £16,674
- Station Terrace, Caerphilly - £13,984
- Thorncombe 2, Blackwood - £13,799
- Bedwas Road, Caerphilly - £12,954
- Emporium, Bargoed - £12,418
- Market Traders, Blackwood - £6,562
- Court House, Blackwood - £6,467

Excess Charge Notices

4.7.4 The table in Appendix 9 shows the annual income generated from excess charge notices for all car parks for financial years 2010/11 - 2014/15. The fluctuations in income from year to year are partly attributed to a reduction in staffing levels resulting from periods of long term sickness.

4.7.5 The Car Parks Section now has a full compliment of staff and it is anticipated that the level of income generated from Excess Charge Notices will increase.

4.8 Existing Provision and Charging Regime

4.8.1 Historically parking charges in the form of pay and display have only been applied to the public car parks in Caerphilly, Blackwood, Bargoed and Ystrad Mynach as these towns top the hierarchal order of shopping centres in the County Borough. These towns, along with Risca, are the five town centres covered by the Council's 'Unique Places' model of Town Centre Management.

4.8.2 The current charging regime is not consistent across the borough as parking charges have not been applied to all of the five managed town centres. Different tariffs also apply to some of the town centre car parks where charges have been introduced. Whilst it would be simpler for the same level of charges to be applied to all town centre car parks across the borough, historically this has not been considered appropriate because of the wide range of economic and localised differences that exist between the towns. The locations of all these car parks are shown on the plans in Appendix 4. An overview of the Highway owned off street parking provision in the main towns and villages is below.

<u>Bargoed</u>

4.8.3 There are currently 6 Highway owned public car parks in Bargoed town centre, of which 4 are free (196 spaces) and 2 are designated as pay and display (68 spaces). In addition to these facilities there is a park and ride car park (89 spaces) situated on the outskirts of the town plus a large free supermarket car park (390 spaces) located in the centre of the town that the general public are permitted to use for a maximum period of 3 hours when visiting Lowry Plaza.

4.8.4 The park and ride car park is very well used (>90% occupancy on most weekdays) however only 50% of the vehicles that presently use the facility are commuters. The other 50% are owned by workers/traders from the town centre who are likely to be parking there in order to avoid parking charges as well as the 3 hour time restriction in Morrison's car park.

4.8.5 The Morrison's superstore car park has a total of 390 parking spaces (242 on level 1 / 148 on level 2) and its central position within the town is attractive to shoppers using the High Street. Surveys have established that the upper tier car park receives a high level of usage, however the lower tier car park is less well used and generally has a significant amount of free parking space available. Surveys show that approximately 80% of parking spaces are generally available at most times of the day on the lower tier.

<u>Blackwood</u>

4.8.6 Blackwood town centre benefits from 14 Highway owned public car parks of which 1 is limited waiting (11 spaces), 1 is free to use (25 spaces), 2 are for residents' only (19 spaces), 1 is for residents and non-residents season tickets (20 spaces), and 9 are designated as pay and display (546 spaces). In addition to these parking facilities there are a number of retail parks situated around the town as well as a superstore that offer a significant amount of free parking. In addition to these, there is a privately managed retail car park located in front of the B&M store that provides free parking for 2 hours and is enforced via ANPR cameras.

4.8.7 The majority of the car parks in Blackwood town centre are situated in close proximity to the High Street and, as such, are both convenient and attractive for shoppers to use. Their good accessibility is considered to be one of the main reasons why they receive such a high level of usage.

4.8.8 High Street, Woodbine Road, Bus Station and Market Trader car parks are located nearest to the town centre and are designated as Short Stay facilities. Court House, Cliff Road, Thorncombe 2 & 3 and Wesley Road car parks are situated further away from the town centre and are designated as long stay facilities.

Caerphilly

4.8.9 There are currently 6 Highway owned public car parks within Caerphilly town centre (296 spaces), of which 4 are pay and display (272 spaces) and 1 is free to use (6 spaces). In addition to these facilities is a large park and ride car park that provides 270 spaces (185 spaces CCBC / 85 spaces ATW) plus a large privately managed car park namely Castle Court Shopping Centre (540 spaces) which has a maximum stay of 3 hours on Monday, Tuesday and Wednesday and 2 hours on Thursday, Friday and Saturday. This is currently under review.

4.8.10 Twyn car park is very well used due its central location within the town centre and close proximity to the castle and is designated as a short stay facility. Crescent Road car park is situated some distance from the town centre, however there are a number of business premises adjacent the car park. In order to cater for the different types of user, the facility offers short stay and long stay tariffs as well as season tickets. The car park also provides a coach parking facility.

Risca

4.8.11 There are 4 Highway owned public car parks in Risca town centre all of which are currently free to use. The car parks provide a total of approximately 124 spaces (including the unmarked area for lorry parking in Raglan Street car park).

4.8.12 Risca is one of the managed town centres. All of the public car parks within Risca town centre are presently free to use. It should be noted that this charging regime is not consistent with the other towns that make up the Town Centre Management Group i.e. Blackwood, Caerphilly, Bargoed and Ystrad Mynach.

4.8.13 Longbridge and Tredegar Street car parks are attractive for shoppers as they are situated in close proximity to the town centre. Longbridge car park receives a high level of usage (>75% full for most of the day) and Tredegar Street car park is less well used (>50% full for most of the day). There is a Lidl supermarket located in Commercial Street that has 2 hours free car parking and its location is attractive for shoppers in the town centre.

4.8.14 Raglan Street and Rifleman Street car parks are located some distance from the town centre and are considered to be too remote for shoppers/workers within the town to use.

4.8.15 A park and ride car park is provided on the outskirts of the town. The facility currently receives a very low level of usage (owing to the limited hourly service) and its remote location is not attractive to shoppers.

Ystrad Mynach

4.8.16 There is only 1 Highway owned public car park (64 spaces) located in the town centre and this facility presently operates under pay and display. The car park is very well used (>90% full during weekdays). There is also a park and ride car park (93 spaces) located on the outskirts of the town. The park and ride car park is very well used by commuters, however its remote location is not attractive to shoppers.

4.8.17 There is a proposal to extend the existing P&R car park for Ystrad Mynach rail station by approximately 125 spaces. The proposal would use Network Rail land to provide a car park with access off Cedar Way over Council land (currently playing fields). The scheme is being promoted and funded by the Welsh Government and is in the final design stages with a planning application expected in the near future.

Nelson

4.8.18 There is 1 Highway owned car park (35 spaces) located within the town centre that receives a high level of usage (>85% full during weekdays).

Newbridge

4.8.19 There are a total of 5 Highway owned public car parks (67 spaces) provided in the town centre (High Street, Pantside Cottages, Meredith Terrace, Victoria Terrace and West View). There is also a relatively large Park & Ride car park (75 spaces) in close proximity to the town centre that receives a relatively low level of usage (30-50% full on weekdays).

4.9 Comparison of parking provision between town centres

4.9.1 The table below shows the total number of Highway owned public car parking spaces currently provided in each town/village and provides a percentage comparison of free and pay and display spaces. Privately managed car parks and park and ride facilities that are remotely located from the town centres are not included as part of the data.

Town Centre	Total no. of parking spaces	No. of free spaces	% of free spaces	No. of pay & display/season ticket spaces	% of pay & display/season ticket spaces
Bargoed Emporium Bus Station St Gwladys Bristol Tce Gateway Hanbury Rd Park & Ride	**338**	264	**78%**	74	**22%**
Blackwood Court House Thorncombe 2 & 3 High Street Cliff Road Red Lion Wesley Road Woodbine Road Bus Station Libanus Road Highland Tce Gordon Road Market Traders	**650**	11	**1.7%**	639	**98%**
Caerphilly Bedwas Road Twyn Station Tce Crescent Rd White Street	**304**	6	**2%**	298	**98%**
Ystrad Mynach Oakfield Street	**68**	68	**0%**	68	**100%**
Risca Longbridge Tredegar Street	**103**	103	**100%**	0	**0%**
Nelson Dynevor Tce	**40**	40	**100%**	0	**0%**
Newbridge High Street Meredith Terrace Newbridge Station Pantside Cottages Victoria Terrace West View	**142**	142	**100%**	0	**0%**

4.9.2 The data shows that Bargoed and Risca have a disproportionately high percentage of free parking spaces compared to the other managed town centres. Caerphilly and Bargoed have a similar number of parking spaces, however 78% of spaces in Bargoed are currently free to use compared to 2% of the spaces in Blackwood and Caerphilly.

4.9.3 There are a number of complex localised factors that need to be taken into consideration when developing a charging regime for the public car parks, however it is apparent that under the current operating arrangement significant disparities exist between the towns.

Scope of Review

4.9.4 The review will need to consider:

- Is the current level of provision across the towns and villages still appropriate?
- Is the current parking regime and parking tariffs across the towns and villages still appropriate to meet the Council's requirements?

4.10 Concessions and Restrictions

Concessions for Traders

4.10.1 The town centre public car parks are primarily intended to provide parking opportunity for shoppers and visitors. A concession for traders already exists in the form of Long Stay car parks which have a lower tariff. Loading Only bays are also provided on-street to assist traders with their operational activities.

Possible Free Parking Concessions

4.10.2 The table in Appendix 8 shows the income generated from ticket sales against each tariff, a summary of which is provided below:

1 hour tickets - £233,506	(34% of total income)
2 hour tickets - £171,451	(25%)
3 hour tickets - £107,045	(16%)
4 hour tickets - £53,140	(8%)
Daily tickets - £85,519	(13%)
Weekly tickets - £3,084	(<1%)

4.10.3 The information shows that the sale of 1 hour tickets generates the highest level of income. The sale of 2 hour tickets generates the second highest level of income. The combined sales of 1 and 2 hour tickets accounts for approximately 60% of the total income generated.

4.10.4 The introduction of any free parking concessions would reduce the income generated by the respective amounts shown in the table in Appendix 8.

4.10.5 In the near future a concession that will allow disabled badge holders to park for an additional hour from the expiry time shown on the pay and display ticket is to be introduced. It is estimated that this will reduce the level of income generated from ticket sales by £20k per annum.

Transferrable Tickets

4.10.6 Parking tickets are not transferable between car parks within the County and experience shows that there appears to be little demand for this as a very limited number of contraventions of this nature have been observed in recent years. With different tariffs being applied to the long stay and short stay car parks and tariffs varying between towns, it is considered that allowing the transfer of tickets has the potential to cause confusion.

Residential / Business Permits

4.10.7 Residents' permits are currently offered for Highland Terrace, Gordon Road and Libanus car parks in Blackwood and will shortly be offered for Bedwas Road car park in Caerphilly. The cost of a permit is £75 per annum for all car parks. Currently only one residents' permit per eligible property is allowed and a second permit can be issued with the Council's discretion depending on availability.

4.10.8 Business permits are not presently offered, however some businesses have purchased multiple season tickets for their staff and works vehicles.

Trading / Markets / Events

4.10.9 The Council's Off-Street Car Parking Places Orders prohibits trading from within the car parks. Consideration will generally only be given to a temporary closure of the car park for Council supported events, during which the Order would be suspended and trading would be permitted.

4.10.10 All charitable events will be considered on their merits and any decision would be based on the level of impact and health and safety implications for the car park and surrounding area. Historically the following activities have been permitted in the car parks:

- Parking of film crew vehicles (subject to charge)
- Parking of mobile cancer screening units (free of charge).

4.10.11 Requests have previously been received for private markets to be held in The Crescent car park in Machen, however these have been refused on highway safety grounds. A mobile butcher presently operates from Victoria car park in Rhymney one day a week, however this car park is not currently subject to an Off-Street Car Parking Places Order.

4.10.12 If Members were minded to accommodate trading and/or non-corporate/non-charitable events within the car parks then some criteria would need to be agreed for officers to manage any requests.

Concessions for Schools

4.10.13 An historic informal concession has been applied to Crescent Road car park in Caerphilly that allows parents of Ysgol-y-Castell to park free of charge between 08:50am-09:10am and 3:20pm-3:40pm. This concession was introduced to alleviate congestion on the residential roads surrounding the school. The informal arrangement is not advertised on the signs within the car park and has caused confusion with parents on a number of occasions and has attracted criticism from other users.

4.10.14 Such concessions are not offered for other Highway owned car parks near schools elsewhere in the County and it is recommended that this arrangement be reviewed.

Disabled Users

4.10.15 In 2013 a review of the pay and display car park provision in the borough was carried out that focussed on the needs of disabled users. In order to better meet the needs of disabled users the following recommendations were identified as part of the review and officers are currently in the process of implementing the recommended measures:

- Additional disabled parking bays to be provided in 12 pay and display car parks (changes already implemented).
- A number of existing disabled parking bays are to be increased in size in 9 pay and display car parks (changes already implemented).
- Concession to allow disabled badge holders to park for an additional hour from the expiry time shown on the pay and display ticket (changes will be implemented before end of current financial year)
- On-street parking exemptions for blue badge holders to be better publicised/promoted (publicity material to be released in conjunction with above Order being made).

Scope of Review

4.10.16 The review will need to consider:

- Are the current concessions for traders still appropriate?
- Should free parking concessions be introduced?
- Should tickets be transferable?
- Does the current use of resident and business permits remain appropriate?
- Is the current approach to trading, markets and events still appropriate?
- Should there be concessions for schools?
- Is the current proposal for a concession for disabled users still appropriate?

4.11 Civil Parking Enforcement (CPE)

4.11.1 Whilst CPE has not been proposed as part of this review it is recognised that the level of on-street parking enforcement can have a direct impact on the turnover of on-street parking spaces, usage of public car parks and consequently the overall vitality of town centres. Previous reports to Members advised of the need to commission specialist consultants to develop a business case based to better understand the implications of the Council taking on these powers to enforce the existing on street parking restrictions.

4.11.2 A working group has been set up between the Council and Gwent Police (with Members participating) to discuss these issues. At the time of writing this report it had not met but a summary of the meeting will be reported to the Committee.

4.12 Payment Methods

4.12.1 At present all P&D machines accept coin cash payment only. Payment by card is a possibility but would require the upgrading of the P&D machines and supporting software and telemetry with the necessary implementation and operational costs. This option would offer more flexibility to car park users and avoid any overpayment, but given the low tariffs there has not been much request for this and take up is expected to be low. Therefore the benefits it would offer for the cost of introducing the service may not offer value for money.

4.12.2 Payment by phone (i.e. mobile) is another possible option that would offer more flexibility to car park users. In addition to the issues raised for card payment, there would be back office changes required and possibly an additional fee to users that may discourage take up.

4.12.3 The optimum time to consider introducing these options would be when the P&D machines are due to be replaced but, this is unlikely to be for at least five years given the they were last replaced in 2010.

Scope of Review

4.12.4 The review will need to consider:

- Is the current payment method still appropriate?
- What alternative/additional options should be considered for the future?

4.13 Summary of the Proposed Scope of the Review

4.13.1 The proposed scope of the review is as identified below:

Parking regime and Tariffs
- What are the main objectives for the Council in applying parking charges in the Council's Highway owner car parks?
- Is the current parking regime and parking tariffs across the borough still appropriate to meet these objectives?
- Is the application of current legislation still appropriate?

Enforcement
- Is the current enforcement regime still appropriate to meet the Council's objectives?
- Is the current level of provision and use of the CCTV system still appropriate?

Existing Provision and Charging Regime
- Is the current level of provision across the towns and villages still appropriate?
- Is the current parking regime and parking tariffs across the town as and villages still appropriate to meet the Council's requirements?

Concessions and Restrictions
- Are the current concessions for traders still appropriate?
- Should free parking concessions be introduced?

- Should tickets be transferable?
- Does the current use of resident and business permits remain appropriate?
- Is the current approach to trading, markets and events still appropriate?
- Should there be concessions for schools?
- Is the current proposal for a concession for disabled users still appropriate?

<u>Payment Methods</u>

- Is the current payment method still appropriate?
- What alternative/additional options should be considered for the future?

<u>Process and Timescale</u>

4.13.2 In order to undertake the review it is proposed that a Task & Finish group of the Regeneration and Environment Scrutiny Committee be established that would discuss and agree how the review will be undertaken and the timescale within which to complete it.

5. EQUALITIES IMPLICATIONS

5.1 This report is for the information purposes, so the Council's Equalities Impact Assessment process does not need to be applied at this stage but will be considered as part of any recommendations identified.

6. FINANCIAL IMPLICATIONS

6.1 None at this time.

7. PERSONNEL IMPLICATIONS

7.1 None.

8. CONSULTATIONS

8.1 All comments received have been incorporated in the report.

9. RECOMMENDATIONS

9.1 Members are asked for their views on the proposed scope of the review for the Council's Highway owned off street car parks as set out in 4.13 above.

9.2 Members are asked for their views on the proposal to establish a Task & Finish group to undertake the review and agree the details of how it will be undertaken and the timescale within which to complete it.

10. REASONS FOR THE RECOMMENDATIONS

10.1 As detailed in paragraph 2.1.

11. STATUTORY POWER

11.1 Road Traffic Regulation Act 1984.

Authors: Dean Smith, Principal Engineer
Clive Campbell, Transportation Engineering Manager

Consultees: Cllr D T Davies - Chair of Regeneration and Environment Scrutiny Committee
Cllr E M Aldworth - Vice Chair of Regeneration and Environment Scrutiny Committee
Cllr T Williams - Cabinet Member for Highways, Transportation & Engineering
Cllr K James – Cabinet Member for Regeneration, Planning and Sustainable Development
Chris Burns – Interim Chief Executive
Christina Harrhy – Corporate Director, Communities
Nicole Scammell, Acting Director of Corporate Services & S 151
Terry Shaw – Head of Engineering Services
Pauline Elliott – Head of Regeneration & Planning
Andrew Highway – Town Centre Development Manager
Alan Dallimore – Team Leader, Urban Renewal & Conservation
Gail Williams – Monitoring Officer/Principal Solicitor
David A Thomas – Senior Policy Officer
Mike Eedy – Finance Manager
Trish Reardon – HR Manager

Background Papers:
Management and Enforcement of Highway Owned Public Car Parks; report to Regeneration and Environment Scrutiny Committee on 17 September 2013.
Review of the Operation and Parking Charges for Blue Badge Holders in Council Public Car Parks; report to Regeneration and Environment Scrutiny Committee on 10 December 2013.
Review of the Impact of Car Parking Charges on Town Centres; report to Regeneration and Environment Scrutiny Committee on 1 April 2014.
Proposed Park & Ride for Ystrad Mynach Rail Station; report to Cabinet on 20 May 2015
Town Centre Parking Strategy for Bargoed; report to Bargoed Town Centre Management Group on 15 October 2015.

Appendices:
Appendix 1 – Table showing historic parking tariffs
Appendix 2 – Table showing 2002 and 2007 parking tariffs
Appendix 3 – List of Highway owned public car parks
Appendix 4 – Plans showing the locations of the Highway owned public car parks
Appendix 5 – Table showing current parking tariffs
Appendix 6 – Table showing tariffs of neighbouring authorities
Appendix 7 – Graph showing income from ticket sales for each town
Appendix 8 – Table showing monthly income from ticket sales
Appendix 9 – Table showing income from Excess Charge Notices
Appendix 10 – Table showing income for each tariff

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TABLE SHOWING HISTORIC PARKING TARIFFS

Tariffs in the early years i.e. 1996-1998

	Ystrad Mynach 1996	Blackwood 1998	Bargoed 1996	Caerphilly 1996
1 hour	20p	20p	20p	20p
2 hours	30p	30p	30p	30p
3 hours	40p	40p	40p	40p
4 hours	60p	60p	60p	60p
Daily	£1.00	£1.00 (long stay) £2.00 (short stay)	£2.00 (short stay only)	£2.00 (short stay only)
Weekly	£4.50	£4.50 (long stay only)	N/A	N/A
Season Ticket	N/A	£160	N/A	N/A
Residents' Permit	N/A	£30	N/A	N/A
Excess Charge Notice	£50 reduced to £20 if paid within 14 days			

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TABLE SHOWING 2002 AND 2007 PARKING TARIFFS

2002 Parking Tariffs

In 2002 the parking tariffs were increased. Different hourly tariffs were introduced for short and long stay car parks. Season tickets increased from £160 to £210. Excess Charge Notices increased to £75 (reduced to £30 if paid within 14 days).

	Short Stay	Short Stay Twyn	Long Stay
1 hour	30p	50p	30p
2 hours	40p	80p	40p
3 hours	60p	£1.20	60p
4 hours	£1.20	£2.50	80p
Daily	£2.40	£5.00	£1.30
Weekly	N/A	N/A	£6.00
Season Ticket	N/A	N/A	£210
Residents' Permit	N/A	N/A	£30
Excess Charge Notice	£75 reduced to £30 if paid within 14 days		

2007 Parking Tariffs

In 2007 a general increase was made to the 2002 tariffs.

	Short Stay	Short Stay Twyn	Long Stay	Long Stay Ystrad
1 hour	40p	50p	40p	30p
2 hours	60p	£1.00	50p	40p
3 hours	90p	£1.50	70p	60p
4 hours	£1.50	£3.00	£1.00	80p
Daily	£3.00	£5.00	£1.50	£1.30
Weekly	N/A	N/A	£7.50	£6.00
Season Ticket	N/A	N/A	£280	£210
Residents' Permit	N/A	N/A	£50	£50
Excess Charge Notice	£75 reduced to £30 if paid within 14 days			

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APPENDIX 3

LIST OF HIGHWAY OWNED PUBLIC CAR PARKS

Item	Location	Car Park Name	Charges	Bays	CCTV
1	Aberbargoed	Pant Street	Free	12	-
2	Abercarn	Bridge Street	Free	15	-
3	Abercarn	Dan-y-Rhiw Terrace	Free	8	-
4	Abercarn	Gwyddon Road	Free	10	-
5	Abertysswg	Walter Street	Free	44	-
6	Bargoed	Bargoed Station	Park & Ride (Free)	89	-
7	Bargoed	Bus Station	Free	18	-
8	Bargoed	Emporium	Pay and display & season ticket	44	yes
9	Bargoed	Bristol Terrace	Free	12	-
10	Bargoed	Gateway	Free	30	-
11	Bargoed	Hanbury Road	Free	114	yes
12	Bargoed	Restaurant Site	Free	34	-
13	Bargoed	St Gwladys	Pay and display & season ticket	24	yes
14	Bedwas	Bridgend Inn	Free	25	-
15	Bedwas	Church Street	Free	12	-
16	Blackwood	Bus Station	Pay and display	45	yes
17	Blackwood	Cliff Road	Pay and display & season tickets	89	yes
18	Blackwood	Court House	Pay and display & season ticket	37	-
19	Blackwood	Gordon Road	Season ticket for residents only	9	yes
20	Blackwood	Highland Terrace	Season ticket for residents only	10	-
21	Blackwood	High street	Pay and display	188	yes
22	Blackwood	Libanus Road	Season ticket for residents & non residents only	20	-
23	Blackwood	Market Traders	Pay and display	21	yes
24	Blackwood	Montclaire avenue	Free	25	-
25	Blackwood	Red Lion	Free (Limited waiting - 2 hours)	11	-
26	Blackwood	Thorncombe 2	Pay and display & season ticket	35	yes
27	Blackwood	Thorncombe 3	Pay and display & season ticket	69	yes

Item	Location	Car Park Name	Charges	Bays	CCTV
28	Blackwood	Wesley Road	Pay and display	28	yes
29	Blackwood	Woodbine Road	Pay and display	34	yes
30	Caerphilly	Aber Station	Park & Ride (Free)	130	-
31	Caerphilly	Bedwas Road	Pay and display & season ticket	18	-
32	Caerphilly	Caerphilly Station	Park & Ride (Free)	270	-
33	Caerphilly	Crescent Road	Pay and display & season ticket	168	yes
34	Caerphilly	Energlyn & Churchill Park	Park & Ride (Free)	15	-
35	Caerphilly	Lawrence Street	Free & Season tickets (Limited waiting - 2 hours)	14	-
36	Caerphilly	Station Terrace	Pay and display & season ticket	24	-
37	Caerphilly	Twyn	Pay and display	62	yes
38	Caerphilly	White Street	Free	10	-
39	Cefn Fforest	Waunborfa Road	Free	16	-
40	Crosskeys	Gladstone Street	Free	40	-
41	Crumlin	Crown Street	Free	12	-
42	Crumlin	Kendon Road	Free	13	-
43	Crumlin	Pen-Y-Fan	Free	40	-
44	Cwmfelinfach	Alexandra Road	Free	25	-
45	Cwmfelinfach	Commercial Buildings	Free	25	-
46	Cwmfelinfach	Maindee Road	Free	10	-
47	Fleur-de-lis	Ivor Street	Free	30	-
48	Hengoed	Hengoed Station	Park & Ride (Free)	45	-
49	Llanbradach	Station Road	Free	20	yes
50	Llanbradach	Station Road	Free	13	-
51	Machen	Siloam Hill	Free (Limited waiting - 1 hour)	4	-
52	Machen	The Crescent	Free	55	-
53	Markham	Bryn Road	Free	12	-
54	Nelson	Dynevor Terrace	Free	35	-
55	Newbridge	High Street	Free	25	-
56	Newbridge	Meredith Terrace	Free	10	-

Item	Location	Car Park Name	Charges	Bays	CCTV
57	Newbridge	Newbridge Station	Park & Ride (Free)	75	yes
58	Newbridge	Pantside Cottages	Free	6	-
59	Newbridge	Victoria Terrace	Free	12	-
60	Newbridge	West View	Free	14	yes
61	New Tredegar	Dyffryn Terrace	Free	26	-
62	New Tredegar	Jubilee Road	Free	6	-
63	New Tredegar	Morgan Street	Free	12	-
64	Oakdale	Pen-Rhiw Avenue	Free	15	-
65	Pengam	Pengam Station	Park & Ride (Free)	155	yes
66	Pontllanfraith	Bryn Lane	Free	10	-
67	Pontllanfraith	Sir Ivors Road	Free	42	-
68	Pontymister	Foundary Road	Free	20	-
69	Pontymister	Herbert Avenue	Free	38	-
70	Pontymister	Mill Street	Free	22	-
71	Pontymister	Risca Station	Park & Ride (Free)	87	yes
72	Rhymney	Lower Row, Bute Town	Free	6	-
73	Rhymney	Rhymney Station	Park & Ride (Free)	23	-
74	Risca	Longbridge	Free	37	-
75	Risca	Raglan Street	Free (Lorry parking permitted - 2 long bays)	6	-
76	Risca	Rifleman Street	Free	17	-
77	Risca	Tredegar Terrace	Free	64	-
78	Senghenydd	Commercial Street	Free	15	-
79	Trethomas	Navigation Street	Free	30	-
80	Wattsville	Islwyn Street	Free	10	-
81	Ynysddu	High Street	Free	25	-
82	Ystrad Mynach	Oakfield street	Pay and display	64	yes
83	Ystrad Mynach	Ystrad Station	Park & Ride (Free)	93	yes

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APPENDIX 4 - CAR PARKS BARGOED

DO NOT SCALE

Key

Pay & Display Car Parks
1 St Gwladys Car Park
2 Emporium Car Park

Park & Ride Car Parks
3 Bargoed Station Car Park

Free Car Parks
4 Gateway Car Park
5 Bristol Terrace Car Park
6 Hanbury Road Car Park

Suffix	Date	Initials	Description

CAERPHILLY COUNTY BOROUGH COUNCIL
CYNGOR BWRDEISTREF SIROL CAERFFILI

TRAFFIC MANAGEMENT
Communities Directorate
Engineering Division HQ.
Ty Penallta, Tredomen Park, Ystrad Mynach
Hengoed CF82 7PG
Head of Engineering Services - Terry Shaw
B.Eng, MBA, C.ENG, MICE,MCMI, MCIHT

project title

Caerphilly County Borough Council
Countywide Review of Highway Owned
Off-Street Car Parks

drawing title

Car Parking locations
Bargoed

scale	date	drawn	checked
NTS	12/11/15	CB	CC

project ref.	drawing no.	rev.

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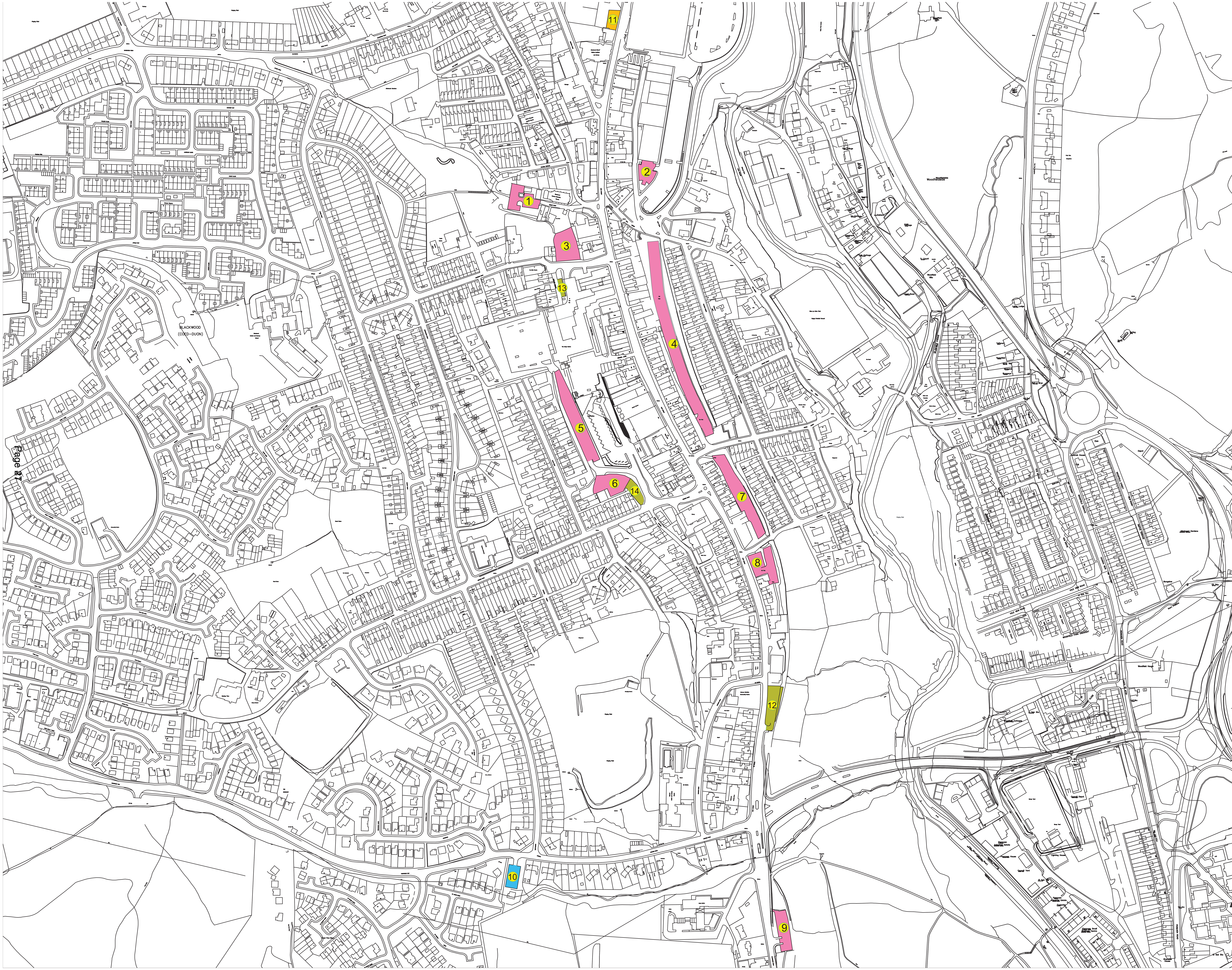
APPENDIX 4 - CAR PARKS BLACKWOOD



DO NOT SCALE

Key

Pay & Display Car Parks

1 Wesley Road Car Park
2 Cliff Road Car Park
3 Woodbine Road Car Park
4 High Street Car Park
5 Bus Station Car Park
6 Market Traders Car Park
7 Thorncombe Road 3 Car Park
8 Thorncombe Road 2 Car Park
9 Court House Car Park

Free Car Parks

10 Montclaire Avenue Car Park

Free (limited waiting - 2 hours) Car Parks

11 Red Lion Car Park

Free Car Parks

12 Libanus Road Car Park
13 Highland Terrace Car Park
14 Gordon Road Car Park

Suffix	Date	Initials	Description

CAERPHILLY COUNTY BOROUGH COUNCIL
CYNGOR BWRDEISTREF SIROL CAERFFILI

TRAFFIC MANAGEMENT
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project title

Caerphilly County Borough Council
Countywide Review of Highway Owned
Off-Street Car Parks

drawing title

Car Parking locations
Blackwood

scale	date	drawn	checked
NTS	12/11/15	CB	CC

project ref.	drawing no.	rev.

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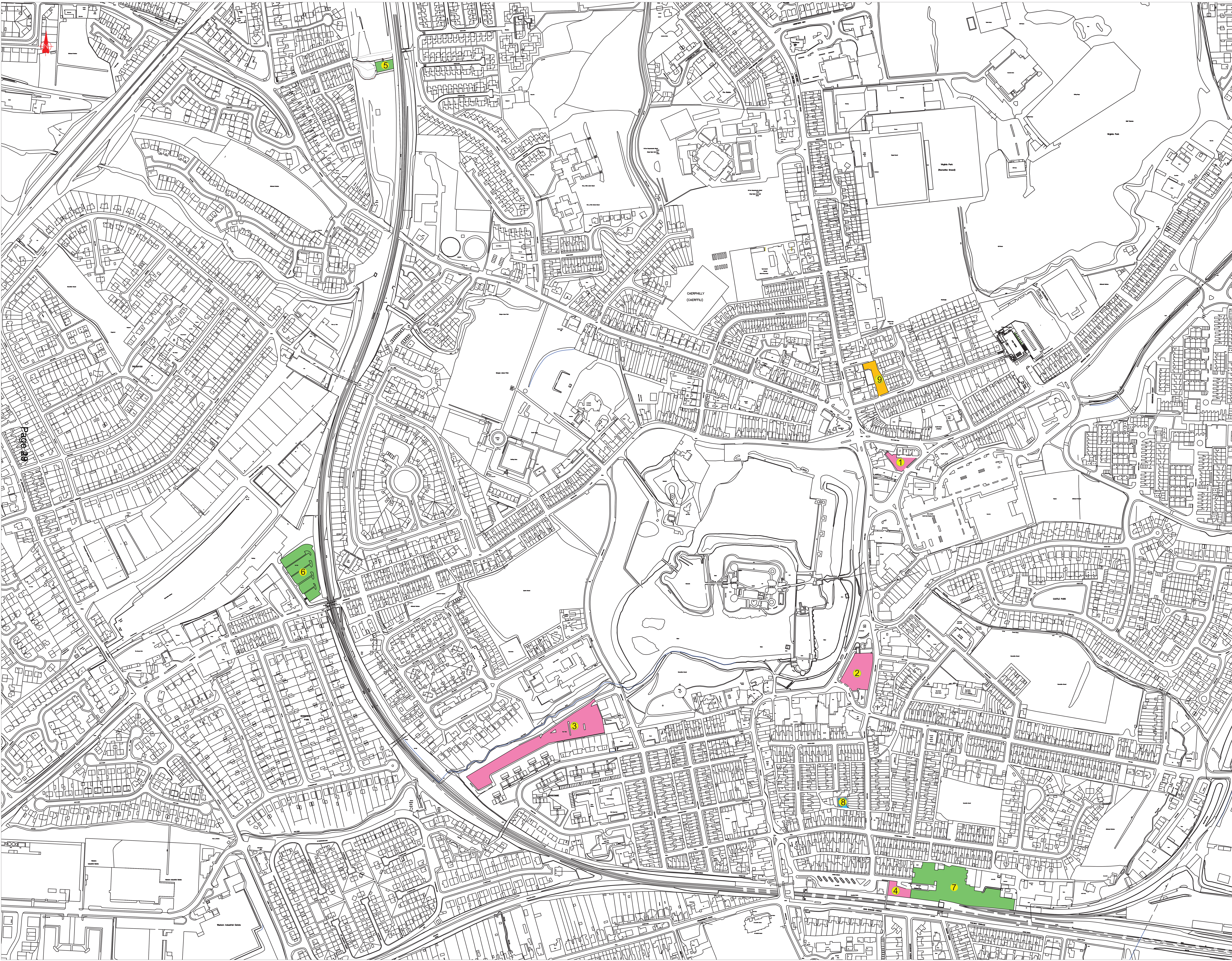
APPENDIX 4 - CAR PARKS CAERPHILLY



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DO NOT SCALE

Key

Pay & Display Car Parks

1 Bedwas Road Car Park
2 Twyn Car Park
3 Crescent Road Car Park
4 Station Terrace Car Park

Park & Ride Car Parks

5 Energlyn & Churchill Park Car Park
6 Aber Station Car Park
7 Caerphilly Station Car Park

Free Car Parks

8 White Street Car Park

Free & Season Tickets (Limited Waiting 2 hours) Car Parks

9 Lawrence Street Car Park

Suffix	Date	Initials	Description

CAERPHILLY COUNTY BOROUGH COUNCIL
CYNGOR BWRDEISTREF SIROL CAERFFILI

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project title

Caerphilly County Borough Council
Countywide Review of Highway Owned
Off–Street Car Parks

drawing title

Car Parking locations
Caerphilly

scale	date	drawn	checked
NTS	12/11/15	CB	CC

project ref.	drawing no.	rev.

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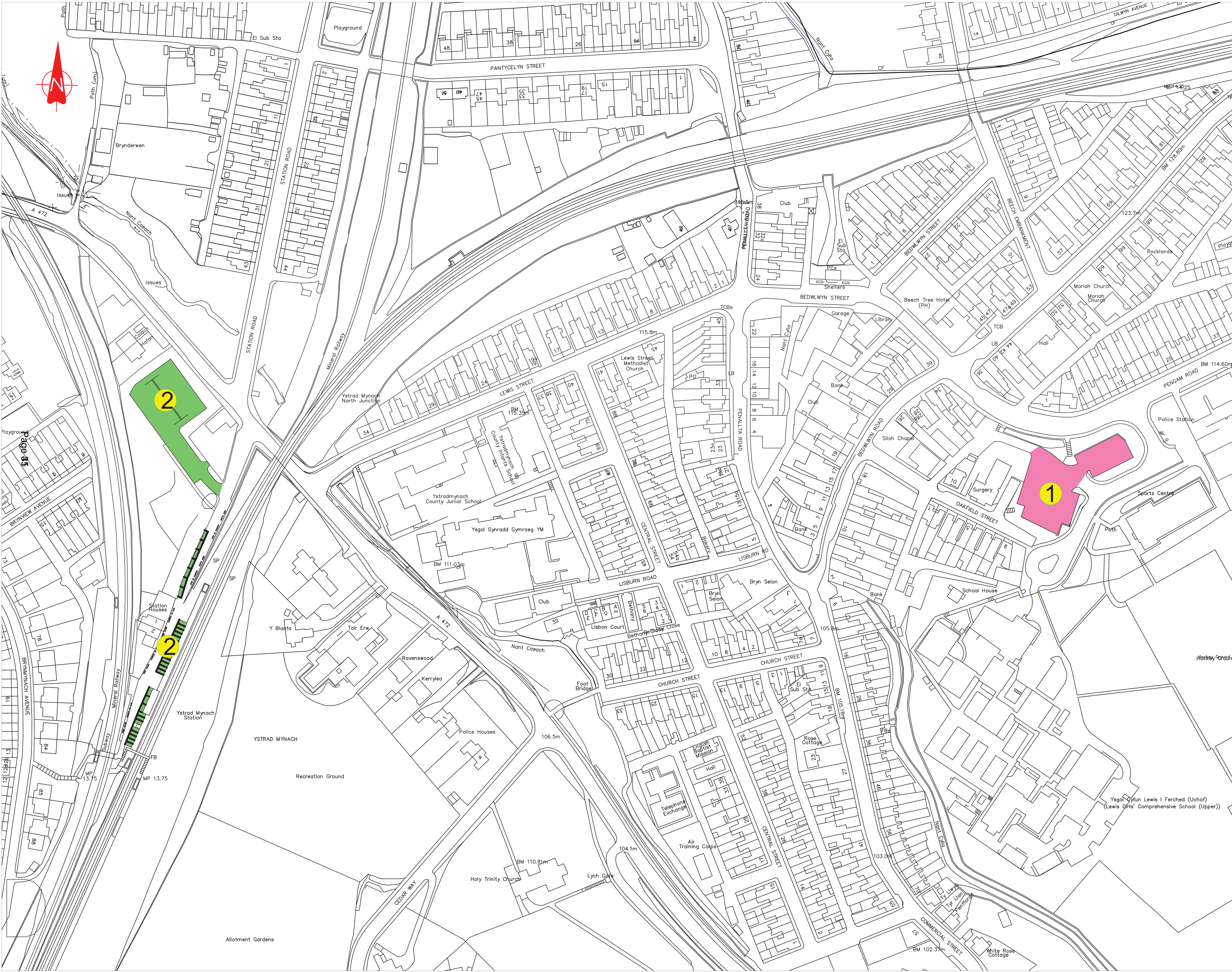

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DO NOT SCALE

Key

Pay & Display Car Parks

1 Oakfield Street Car Park

Park & Ride Car Parks

2 Ystrad Station Car Park

Suffix	Date	Initials	Description

TRAFFIC MANAGEMENT
Communities Directorate
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project title

Caerphilly County Borough Council
Countywide Review of Highway Owned
Off-Street Car Parks

drawing title

Car Parking locations
Ystrad Mynach

scale	date	drawn	checked
NTS	12/11/15	CB	CC

project ref.	drawing no.	rev.

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TABLE SHOWING CURRENT PARKING TARIFFS

2015 / Current Parking Tariffs (introduced in 2010)

Location	1hr	2hr	3hr	4hr	Daily	Weekly	Annual Tickets
BLACKWOOD							
Court House	50p	70p	90p	£1.20	£2.00	£9.00	£95 / 3 months £300 / year
Cliff Road	50p	70p	90p	£1.20	£2.00	£9.00	£95 / 3 months £350 / year
Thorncombe No.2	50p	70p	90p	£1.20	£2.00	£9.00	£95 / 3 months £350 / year
Thorncombe No.3	50p	70p	90p	£1.20	£2.00	£9.00	£95 / 3 months £350 / year
Wesley Road	50p	70p	90p	£1.20	£2.00	£9.00	N/A
High Street	50p	80p	£1.20	£2.00	£3.50	N/A	N/A
Woodbine Road	50p	80p	£1.20	£2.00	£3.50	N/A	N/A
Bus Station	50p	80p	£1.20	£2.00	£3.50	N/A	N/A
Market Trader	50p	80p	£1.20	£2.00	£3.50	N/A	N/A
Libanus Road	Season tickets only (£75.00 for residents / £200 for non residents)						
Highland Terrace	Season tickets only (£75.00 for residents)						
Gordon Road	Season tickets only (£75.00 for residents)						
BARGOED							
Emporium	50p	80p	£1.20	£2.00	£3.50	N/A	£95 / 3 months £350 / year
ST Gwladys	50p	80p	£1.20	£2.00	£3.50	N/A	£95 / 3 months £350 / year
CAERPHILLY							
Twyn	60p	£1.20	£1.80	£3.50	£600	N/A	Every day
Crescent North East Section	50p	80p	£1.20	£2.00	£3.50	N/A	N/A
Crescent Middle Section	50p	70p	90p	£1.20	£2.00	£9.00	£95 / 3 months £350 / year
Bedwas Road	50p	70p	90p	£1.20	£2.00	£9.00	£95 / 3 months £350 / year
Station Terrace	50p	70p	90p	£1.20	£2.00	£9.00	£95 / 3 months £350 / year
Lawrence Street	2hr limited waiting (no charge) Season tickets (£75 / 3 months & £250 / year)						
YSTRAD MYNACH							
Oakfield Street	40p	50p	70p	£1.00	£1.50	£7.50	N/A

	Short Stay	Short Stay Twyn	Long Stay	Long Stay Ystrad
1 hour	50p	60p	50p	40p
2 hours	80p	£1.20	70p	50p
3 hours	£1.20	£1.80	90p	70p
4 hours	£2.00	£3.50	£1.20	£1.00
Daily	£3.50	£6.00	£2.00	£1.50
Weekly	N/A	N/A	£9.00	£7.50
Season Ticket	N/A	N/A	£350	£350
Residents' Permit	N/A	N/A	£75	£75
Excess Charge Notice	£75 reduced to £30 if paid within 14 days			

TABLE SHOWING TARIFFS OF NEIGHBOURING AUTHORITIES

Car Park Charging Comparisons with Neighbouring Authorities

The current charging system is considered similar or slightly cheaper than in neighbouring towns. There are however, considerable variations in charges and strategies making it difficult to carry out an exact comparison.

Tariffs in the Short Stay Car Parks

	Caerphilly	Merthyr Tydfil	Rhondda Cynon Taf	Newport
1 hour	50p	70p	75p	N/A Free
2 hours	80p	no rate	£1.50	N/A Free
3 hours	£1.20	£1.50	£2.50	£1.00
4 hours	£2.00	N/A	£3.40	N/A
5 hours	N/A	N/A	N/A	£3.50
Daily	£3.50	£3.50	£12.55	£4.50
Five Days	N/A	N/A	N/A	N/A
Six Days	N/A	£14.00	N/A	N/A
		£1.00 all day on Saturdays		

Tariffs in the Long Stay Car Parks

	Caerphilly	Merthyr Tydfil	Rhondda Cynon Taf
1 hour	50p	70p	N/A
2 hours	70p	N/A	N/A
3 hours	90p	£1.50	N/A
4 hours	£1.20	N/A	£1.30
5 hours	N/A	N/A	N/A
Daily	£2.00	£3.50	£2.50
Weekly 6 days	£9.00	£14.00	N/A
Season ticket Non residents	£95/3 months £350/year	N/A	£37.50 monthly £375 annually
Season ticket Residents	£75/year	N/A	N/A
		£1.00 all day on Saturdays	

Merthyr season tickets - £38 / month
£114 / quarter
£350 annually (can be paid in monthly instalments)

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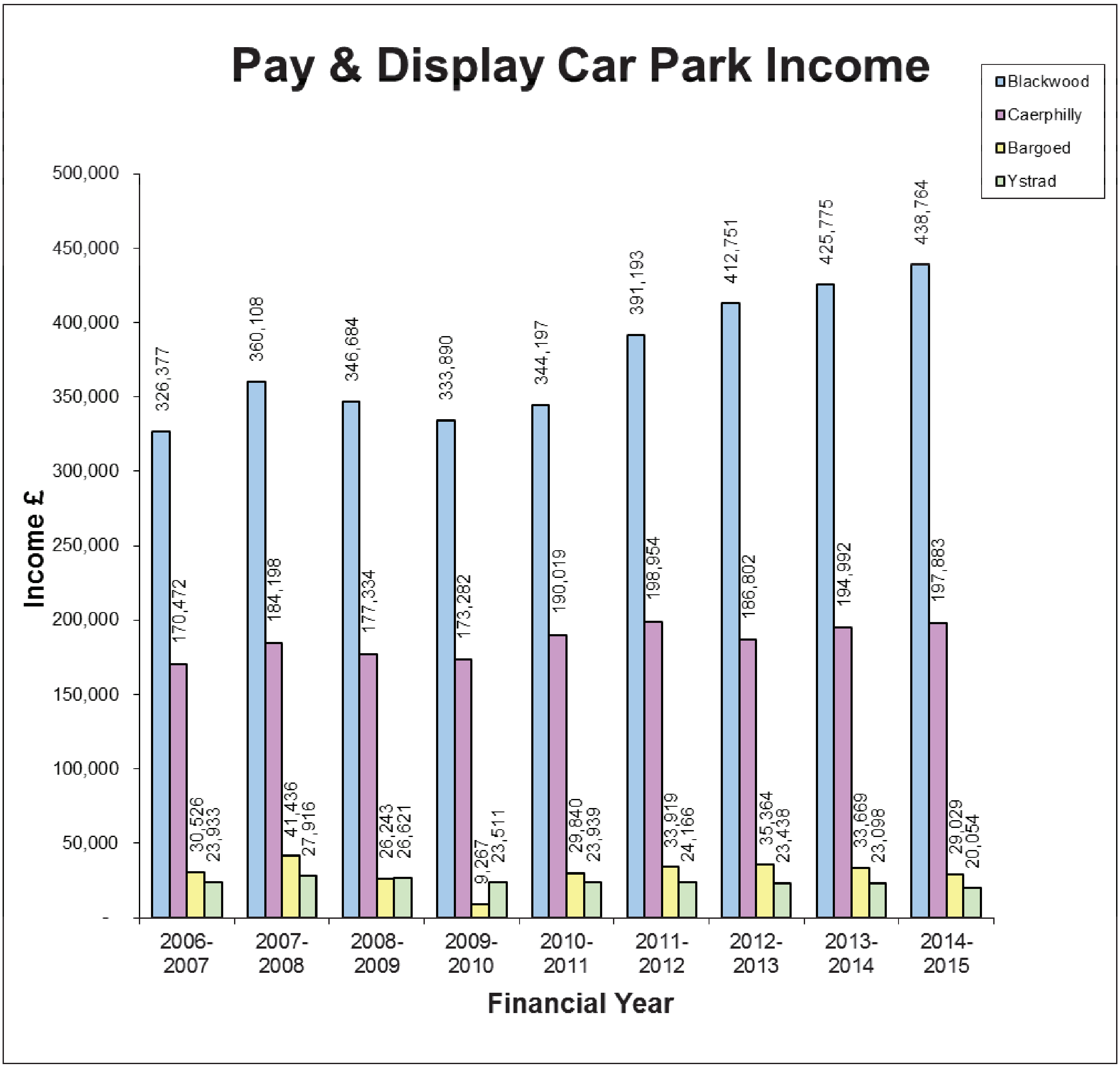
GRAPH SHOWING INCOME FROM TICKET SALES FOR EACH TOWN



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APPENDIX 8

TABLE SHOWING MONTHLY INCOME FROM TICKET SALES

MONTHLY INCOME FOR THE CAR PARKS FOR YEAR 2014 - 2015

Car Park Name	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	TOTAL
Court House	418	917	471	337	523	475	506	511	519	489	678	623	£6,467.00
Thorncombe 2	1134	1127	1021	860	792	1660	1449	893	1073	1018	1396	1376	£13,799.00
Thorncombe 3	4525	3084	3740	3886	3953	4740	3481	3812	4782	3547	3440	4839	£47,829.00
High Street	15346	15945	13892	16961	18418	16895	17157	14964	20647	16048	17104	18113	£201,490.00
Wesley Road	2357	2358	1993	2368	2293	2337	2643	2823	3181	2145	2013	2206	£28,717.00
Woodbine	3258	3323	3016	3516	3436	3258	3355	3205	4105	3165	3021	3561	£40,219.00
Bus Station	3833	3210	3417	4057	3579	4002	3151	3177	5085	3026	3218	4218	£43,973.00
Market Traders	334	836	396	107	497	642	560	696	519	742	566	667	£6,562.00
Cliff Road	4541	3938	3526	4545	3714	4242	3951	3830	5622	3702	3702	4395	£49,708.00
Oakfield Street	2124	1817	1630	2300	1359	2241	2045	1981	2174	1751	1920	2712	£24,054.00
Twyn	11717	11239	9791	12584	11805	11590	10505	9786	9064	9676	9892	11220	£128,869.00
Crescent	4044	3758	3071	4598	4428	4239	2889	2461	4109	1364	2813	4302	£42,076.00
Bedwas Road	1287	1585	899	956	877	1264	954	975	1053	724	976	1404	£12,954.00
Station Terrace	1109	984	1042	1525	839	1237	1044	1068	1561	952	1204	1419	£13,984.00
Emporium	1213	962	950	1184	1015	1181	890	944	1408	706	869	1096	£12,418.00
St Gwladys	1592	1272	1281	1694	1169	1606	1353	1468	1175	1096	1282	1686	£16,674.00
TOTAL/Month	58832	56355	50136	61478	58697	61609	55933	52594	66077	50151	54094	63837	£689,793.00

APPENDIX 8

MONTHLY INCOME FOR THE CAR PARKS FOR YEAR 2013 – 2014

Car Park Name	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	TOTAL
Court House	1181	753	410	721	285	407	489	720	674	720	650	756	£7,766.20
Thorncombe 2	990	688	1506	807	698	1564	1776	675	1377	675	1036	1588	£13,379.65
Thorncombe 3	4638	3648	3406	4236	3796	3434	4475	3190	3512	3190	3083	3057	£43,665.20
High Street	16159	16657	14928	17089	15394	14297	15970	16041	17862	16041	12737	13806	£186,980.85
Wesley Road	2328	2609	2188	2623	2419	2256	2516	2943	2966	2943	1892	2063	£29,745.95
Woodbine	3748	728	2192	3518	3252	3110	3365	3590	3690	3590	2714	2991	£36,488.00
Bus Station	3761	3150	3316	4166	3198	3253	3793	3111	4721	3111	2661	2959	£41,200.45
Market Traders	736	N/C	1147	N/C	1007	482	510	689	674	689	730	712	£7,376.00
Cliff Road	5067	4661	4579	5525	4473	4435	5531	5550	6095	5550	3708	3999	£59,173.30
Oakfield Street	1858	2391	1840	2253	1397	1645	2351	1909	1982	1909	1711	1853	£23,098.90
Twyn	10759	10231	10003	12613	10952	9699	10698	10029	8937	10029	9858	10805	£124,613.20
Crescent Road	4560	4212	3878	4892	4880	3252	4622	3433	4384	3433	1840	2349	£45,735.20
Bedwas Road	1271	828	897	838	914	821	1377	965	1050	965	927	987	£11,839.85
Station Terrace	1133	930	1009	1319	928	853	1028	1121	1376	1121	950	1037	£12,804.55
Emporium	1397	1077	1192	1453	1138	1199	1471	1190	1655	1190	985	967	£14,913.80
St Gwladys	1681	1213	1408	2060	1623	1718	2195	1688	848	1688	1320	1314	£18,756.05
TOTAL/Month	**61267**	**53776**	**53899**	**64113**	**56354**	**52425**	**62167**	**56844**	**61803**	**56844**	**46802**	**51243**	**£677,537.15**

APPENDIX 8

MONTHLY INCOME FOR THE CAR PARKS FOR YEAR 2012 – 2013

Car Park Name	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	TOTAL
Court House	55	628	795	737	847	872	361	661	1078	494	566	516	£7,610.00
Thorncombe 2	1021	1628	1012	1262	787	1252	1848	1005	770	864	1303	1320	£14,072.00
Thorncombe 3	3404	4866	4066	4489	4239	3911	5005	4052	2831	3094	3809	3642	£47,408.00
High Street	13535	16052	15439	16159	16241	14267	16296	15911	8927	12616	14439	15261	£175,143.00
Wesley Road	2320	2450	2342	2367	2520	2290	2561	2895	1505	1829	2088	2313	£27,480.00
Woodbine	3116	3614	3781	3637	3522	3315	3726	3689	1819	2897	3275	3689	£40,080.00
Bus Station	3938	4113	3170	3323	3791	3162	3875	3059	1838	3204	2939	2940	£39,352.00
Market	74	633	463	1099	122	496	796	347	685	282	615	385	£5,997.00
Cliff Road	4542	4898	4623	5040	4372	4039	5634	4939	3963	4548	4333	4678	£55,609.00
Oakfield Street	1781	2452	1879	2482	1636	2013	2525	1965	969	1809	1943	1984	£23,438.00
Twyn	9089	10000	9664	11809	10929	9320	10648	10120	4076	8181	9417	10676	£113,929.00
Crescent Road	4413	5423	4451	4584	4257	4100	4960	2826	2224	2764	3011	3145	£46,158.00
Bedwas Road	915	1548	939	1009	971	897	1467	974	753	673	886	1026	£12,058.00
Station Terrace	1283	1335	980	1635	1521	1116	1503	1189	892	1190	1061	952	£14,657.00
Emporium	990	1762	1267	1651	1231	1337	1632	1129	729	1081	1328	1147	£15,284.00
St Gwladys	1372	1754	1428	1893	1438	1791	2479	1970	918	1529	1804	1704	£20,080.00
TOTAL/Month	51848	63156	56299	63176	58424	54178	65316	56731	33977	47055	52817	55378	£658,355.00

APPENDIX 8

MONTHLY INCOME FOR THE CAR PARKS FOR YEAR 2011 – 2012

Car Park Name	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	TOTAL
Court House	N/A	729	808	629	697	705	543	541	999	654	502	965	£7,772.00
Thorncombe 2	902	1963	892	1275	1020	1049	1121	1656	879	1268	823	1181	£14,029.00
Thorncombe 3	3861	4197	3566	4040	3548	3461	3270	4788	3193	4145	3623	4245	£45,937.00
High Street	14249	14490	13531	15177	14519	14184	12727	15725	10415	14878	13309	15510	£168,714.00
Wesley Road	2193	2415	2130	2078	2532	2076	2211	2887	N/A	2140	2051	2107	£24,820.00
Woodbine	3556	3434	3080	3591	3299	3473	3027	3802	N/A	2968	2960	3585	£36,775.00
Bus Station	2500	3639	2373	2511	2288	2295	2277	4714	1900	2965	2868	3067	£33,397.00
Market Traders	460	980	N/C	573	775	472	466	544	661	748	294	766	£6,739.00
Cliff Road	4207	4812	4088	3966	4541	3676	3944	6263	4318	4940	3995	4260	£53,010.00
Oakfield Street	1819	2236	1807	1990	2018	1911	2018	2711	1116	2340	1932	2268	£24,166.00
Twyn	10283	10464	9464	11190	11863	10597	8440	10980	5252	8738	9925	10121	£117,317.00
Crescent	5140	6019	4655	5014	6190	3604	4496	5298	3239	2813	3841	4100	£54,409.00
Bedwas Road	968	1276	1081	877	969	970	968	1488	799	865	983	1075	£12,319.00
Station Terrace	1101	1492	1187	1344	1351	1385	1191	1789	1070	912	1041	1046	£14,909.00
Emporium	1291	1803	1421	1446	1092	655	1260	1503	454	1335	1049	1148	£14,457.00
St Gwladys	1472	1641	1485	1525	2788	2398	1553	1769	783	1393	1286	1369	£19,462.00
TOTAL/Month	54002	61590	51568	57226	59490	52911	49512	66458	35078	53102	50482	56813	£648,232.00

APPENDIX 8

MONTHLY INCOME FOR THE CAR PARKS FOR YEAR 2010 – 2011

Car Park Name	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	TOTAL
Court House	CLOSED	CLOSED	CLOSED	CLOSED	CLOSED	CLOSED	CLOSED	CLOSED	CLOSED	CLOSED	CLOSED	CLOSED	
Thorncombe 2	883	937	1360	946	792	968	1070	1582	210	972	1118	1034	£11,871.55
Thorncombe 3	3128	3063	3641	3243	3013	3274	3860	5067	3557	3421	3512	3944	£42,723.45
High Street	12105	10608	12205	12418	12450	12926	14621	13534	9636	11741	11616	15934	£149,794.15
Wesley Road	1406	1476	1898	1530	1204	1867	2033	2766	747	1732	2030	2518	£21,206.80
Woodbine	2587	2223	2485	2835	2576	2938	3202	3082	1174	2497	2743	3170	£31,512.30
Bus Station	1689	1835	2927	1899	1821	2045	2303	4038	1460	1914	2009	2609	£26,548.80
Market Traders	1022	570	498	587	886	915	74	742	665	386	546	584	£7,475.40
Cliff Road	3772	3643	4709	3816	4583	4563	4787	6450	3485	4117	4130	5010	£53,065.00
Oakfield Street	1721	1737	2028	1657	1786	2011	2180	3513	976	1803	2042	2485	£23,939.30
Twyn	9699	7814	10062	9764	10224	9146	10904	9317	5150	8175	8416	10328	£108,999.20
Crescent	3761	3982	5867	4120	5133	4318	4649	5511	3131	3886	4173	7475	£56,005.50
Bedwas Road	751	873	1114	830	772	810	1014	1458	621	894	993	925	£11,054.95
Station Terrace	898	904	1306	1058	959	983	1201	2211	981	963	1054	1442	£13,960.05
Emporium	1125	1269	1415	1286	1462	1381	1412	1675	771	1358	1629	1940	£16,722.70
St Gwladys	1153	1043	1220	1000	1184	1175	1319	1252	544	994	944	1290	£13,117.70
TOTAL/Month	45700	41977	52735	46989	48845	49320	54629	62198	33108	44853	46955	60688	£587,996.85

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TABLE SHOWING INCOME FROM EXCESS CHARGE NOTICES

Financial Year	Income / £
2014/15	92,518
2013/14	103,248
2012/13	78,903
2011/12	81,896
2010/11	107,245

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TABLE SHOWING INCOME FOR EACH TARIFF

Incomes per tariff for 2014/15 fiscal year

Location		Tariff	Income	1 hour Free	2 hours Free	3 hours Free	4 hours Free
Long Stay							
Court House Thorncombe 2 Thorncombe 3 Cliff Road Bedwas Road Crescent Road Wesley Road Station Terrace Weekly tickets only available for Station Tce	1 hr	50p	£38,526.10	£38,526.10	£38,526.10	£38,526.10	£38,526.10
	2 hours	70p	£20,679.80		£20,679.80	£20,679.80	£20,679.80
	3 hours	90p	£35,068.60			£35,068.60	£35,068.60
	4 hours	£1.20	£14,229.45				£14,229.45
	Daily	£2.00	£76,421.35				
	Weekly	£9.00	£3,024.50				
Oakfield Street	1 hr	40p	£7,144.30	£7,144.30	£7,144.30	£7,144.30	£7,144.30
	2 hours	50p	£7,593.45		£7,593.45	£7,593.45	£7,593.45
	3 hours	70p	£1,720.85			£1,720.85	£1,720.85
	4 hours	£1.00	£4,083.75				£4,083.75
	Daily	£1.50	£2,661.40				
	Weekly	£7.50	£60.05				
Short Stay							
High Street Woodbine Bus Station Market Trader Crescent Road Emporium St Gwladys	1 hr	50p	£124,062.25	£124,062.25	£124,062.25	£124,062.25	£124,062.25
	2 hours	80p	£117,148.20		£117,148.20	£117,148.20	£117,148.20
	3 hours	£1.20	£46,415.40			£46,415.40	£46,415.40
	4 hours	£2.00	£26,438.95				£26,438.95
	Daily	£3.50	£28,155.25				
Twyn	1 hr	60p	£53,773.40	£53,773.40	£53,773.40	£53,773.40	£53,773.40
	2 hours	£1.20	£36,030.10		£36,030.10	£36,030.10	£36,030.10
	3 hours	£1.80	£23,840.70			£23,840.70	£23,840.70
	4 hours	£3.50	£8,388.40				£8,388.40
	Daily	£6.00	£6,436.80				
		Total	**£681,903.05**	**£233,506.05**	**£404,957.60**	**£512,003.15**	**£565,143.70**

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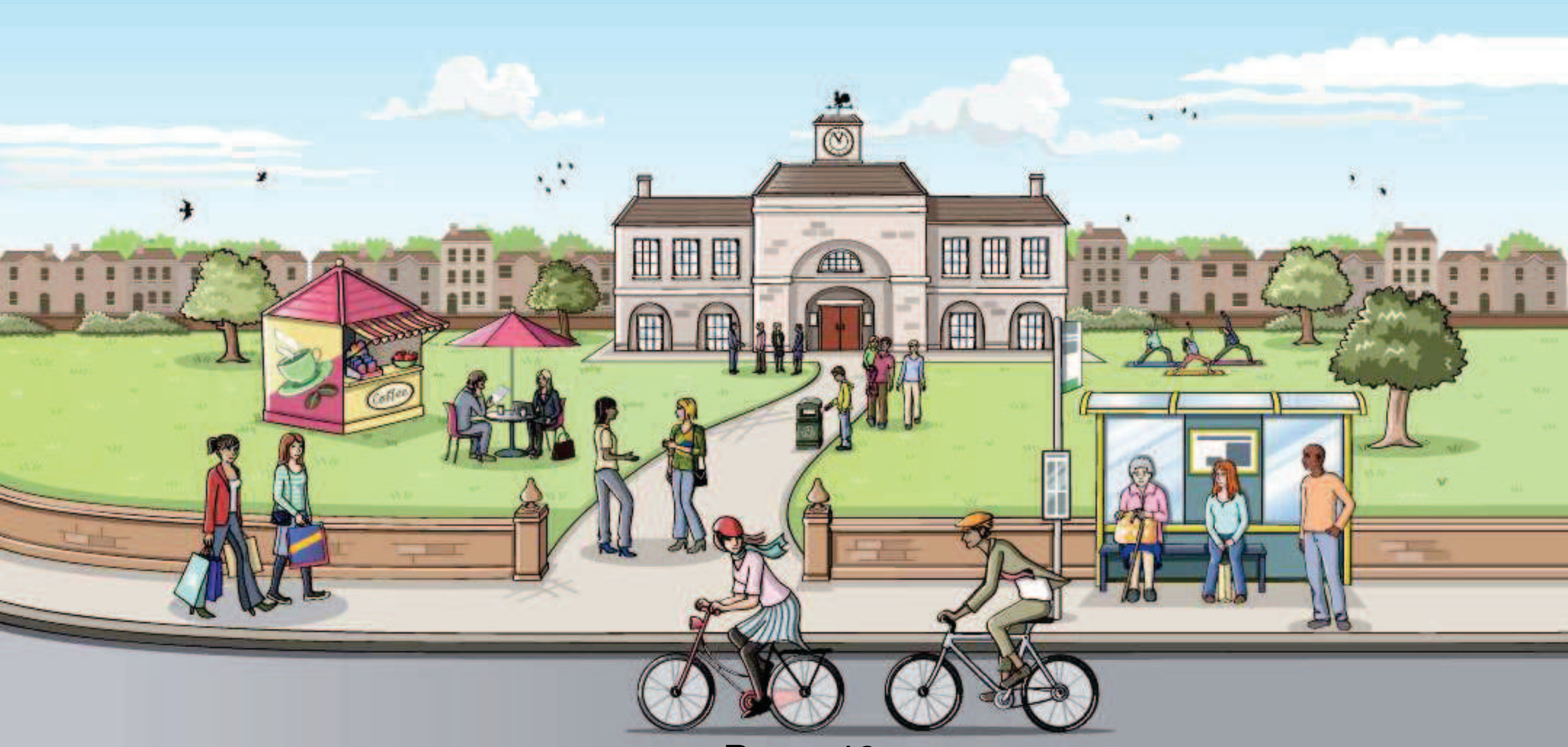
mruk research

Assessing the Impact of Car Parking Charges on Town Centre Footfall

March 2015

Prepared for the Welsh Government



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1. Executive summary

1.1 Background

1.1.1 The Welsh Government is looking to improve its evidence base on the relationships between car parking charges and town centre footfall. mruk therefore undertook this research in order to examine the relationships between local authority decision making in relation to parking charges in Wales, the views of people visiting town centres across Wales, local stakeholders and examples of best practice across the UK.

1.2 Methodology

1.2.1 mruk undertook a literature review of existing evidence, a series of six in-depth interviews with Local Authorities, 16 in-depth interviews with business owners/ workers and 208 in-street interviews with town centre visitors in five key towns across Wales[1]. More detailed information on the methodology can be found in Chapter 2.

1.3 Key findings and conclusions

1.3.1 Charging for car parking is a complex issue. It is only one aspect of a complex interplay of factors influencing willingness to travel by car, time and money spent, and business activity in town centres. It is very difficult to separate the influence of car parking charges from other factors.

1.3.2 Car park charging is often perceived, particularly amongst businesses, as being a key determinant for changes in footfall levels in town and city centres. Over three-quarters of the business owners / workers interviewed suggested that car parking options have an impact on the number of people coming into the town centre and therefore on their custom. However, the available evidence almost entirely anecdotal.

1.3.3 Beyond anecdote, there is very little published evidence which links changes in car park charges to changes in town centre footfall. Local Authorities and other stakeholders similarly rely mostly on anecdote when relating car park charges to footfall. However, their feedback does suggest that a relationship exists.

1.3.4 Visitors to town centres suggested that car park charges impact on how long they to remain in the centre and, consequently, how much they spend whilst there. However, the general availability of spaces is felt by visitors to be more important than cost in their overall decision about visiting. Traffic flow and parking signage are felt by visitors to have the same, if not greater, effect on their decision to visit the town centre, how long they spend there, and how much money they spend.

1.3.5 Out of town developments were unanimously cited as being at least partly responsible for having a detrimental impact on footfall and business trade in the town and city centres. The fact that most of these developments offer free parking was felt to give shoppers a reason to go to them over town or city centres.

1.3.6 Whilst a 'blanket' free parking strategy has been suggested to encourage more car park users, these were generally found not to benefit target visitors (for example, the spaces

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1 Including councils in Carmarthenshire, Denbighshire, Newport, Swansea and Wrexham, town centre interviews in Aberystwyth, Llanelli, Newport and Ruthin

were used primarily by town centre workers who were taking up the spaces all day, rather than shoppers) and consequently had an unexpectedly negative impact on footfall.

1.3.7 Local Authorities often primarily use car park charges as a revenue stream, ignoring or de-emphasising the complex, nonlinear effects that they can have on town centre footfall. Some stress the importance of finding a compromise between generating sufficient parking revenue and keeping charges at a rate that will not alienate shoppers and drive them out of the town or city centre.

1.3.8 There are also three broad types of methodological conclusions that can be used to inform future research. Firstly, **there is a lack of robust evidence that can be used to link car parking strategies and town centre footfall**. Robust, numerical information based on recordings of footfall, business revenue, car park usage, and changes to car parking strategies is not available amongst the Local Authorities surveyed. Secondly, **charging for car parking is one of a complex array of factors that can influence town centre vitality.** Disentangling them through qualitative research and a small-scale survey is a challenge. Further research using larger sample sizes would be needed to build a stronger evidence base. Finally, **town centre economies are highly localised and are hyper-specific.** Towns are very different economically; different factors are at play across locations. Parking strategies will need to be tailored to local areas to maximise the impact on footfall.

1.4 Recommendations

1.4.1 **Car park charging should not be viewed in isolation from other factors (availability of parking, signage, traffic flow) which affect willingness to drive in town centres**. An overall systemic approach could be taken to future research which examines this complex interplay, rather than one aspect of it. Further quantitative research with visitors, potential visitors and businesses would allow for robust trade-off testing of potential parking packages. These could be modelled to determine the strategies most likely to improve footfall.

1.4.2 **Local Authorities should be encouraged to consider the impacts of car parking charges in the broadest possible sense, particularly if their primary goal in changing them is to generate revenue.** They should engage with key stakeholders involved in the local economy when changing their car park charges, for example business owners, shoppers, council members etc. This is key to ensuring the optimum charging strategies are adopted.

1.4.3 **Local Authorities should be encouraged to collect more robust data on the impact of car park charging in their areas**. This will help further planning around car park charging, both at the local and national level.

1.4.4 In developing solutions to encourage greater town centre footfall **the Welsh Government should work closely with Local Authorities and business groups to develop parking strategies** that:

- Take into account other key decision-making factors (e.g. availability of spaces, parking restrictions, car park security etc.)
- Protect sustainable revenue income for councils

1.4.5 In addition, a one size fits all approach to parking strategy is unlikely to work across Wales. The Welsh Government will need to work with Local Authorities to **develop parking strategies that factor in local nuances** in town centre layout and retail offerings which differ between locations. For example, in some areas strategies will need to focus more on parking availability or cost, while in other areas it will be more important to focus on promoting the retail offer in town centres vs. the out-of-town offer.

2. Research background, objectives and methodology

2.1 Background and research objectives

2.1.1 Town centre vitality is a key issue across the UK. Its importance is acknowledged by governments across the UK. In 2011, the National Assembly for Wales' Enterprise and Business Committee's Inquiry into the Regeneration of Town Centres concluded that vibrant town centres are core to a healthy and prosperous Welsh economy[2]. Similar conclusions were reached by the UK Government's 2011 report[3] into the future of UK high streets. However, a number of factors make it difficult to maintain the vitality of some town centres, and to enable previously vibrant centres to regain their vitality.

2.1.2 Changes in the way that people shop are a key factor. Over the past 20 years, there has been a substantial increase in investment in out of town shopping centres. In 1993, the proportion of investment in out of town was less than a fifth of that in town centres; the value of property owned out of town has now overtaken that held in town centres[4]. In the decade to 2011 the amount of out-of-town retail floor space rose by 30% whilst that in-town fell by 14%. In addition, retail spending in town centres is falling, from 50% of total retail spending in 2000 to an estimated 40% in 2014[5]. A similar pressure comes from online shopping; this too has risen substantially in recent years, from just over 2% of all retailing in 2006, to over 10% in 2012[6].

2.1.3 Furthermore, the economic downturn, and a rise in VAT to 20% in 2011, have added further pressures to household budgets, and so to consumer spending. The economic downturn has also resulted in pressure on Local Authorities (LAs); budget cuts have increased pressure on taxes, services and, crucially for this report, council revenue streams.

2.1.4 One such revenue stream is car parking charges. Other than in private car parks (e.g. NCP), LAs control the availability, duration and cost of car parking. They frequently have more control over parking than any other aspect of transport policy and management[7]. However, crucially, they are often not in control of the charging rates set at out-of-town developments. These are often free, and the shopping centres are often designed to make shopping as easy as possible for people travelling by car[8]. These discrepancies between in-town and out-of-town retail offerings are often blamed, particularly by the business community and by LAs, for decreasing footfall and revenue in town centres. Car parking charges are frequently cited by the business community as being directly related to footfall and revenue.

2.1.5 While plenty of commentary and reporting is available in relation to car parking charges, it is currently unclear how much of it goes beyond anecdote, or the aggregated recollections of members of the business community. As a consequence, The Welsh Government is looking

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2 National Assembly for Wales - Enterprise and Business Committee, Regeneration of Town Centres, (January 2012) www.senedd.assemblyWales.org/mgIssueHistoryHome.aspx?IId=1522

3 https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/6292/2081646.pdf

4 http://www.english-heritage.org.uk/publications/changing-face-high-street-decline-revival/773_130604_final_retail_and_town_centre.pdf

5 https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/6292/2081646.pdf

6 http://www.thisismoney.co.uk/money/news/article-2264428/Fears-big-chill-UK-growth-Christmas-retail-sales-come-worse-feared.html

7 http://towns.org.uk/files/Market-Towns-Car-Parking-Research-2007.pdf

8 http://www.britishparking.co.uk/write/Documents/Library/position%20papers/Position%20Paper%2012.pdf

to improve its evidence base on the relationships between car parking charges and town centre footfall. This research aimed to:

- review the existing literature on car parking charges and town centre footfall
- identify which approaches to car parking charges and charging have been successful and unsuccessful in increasing town centre footfall
- examine the relationship between different approaches to car parking charges and different user types (workers, shoppers, etc.)
- produce a qualitative assessment of the impact of varying car parking charges on overall town centre footfall and on different town centre users and
- provide recommendations on how car parking charges can be used to influence town centre footfall.

2.2 Research methodology

2.2.1 A mixed methodology was used. This involved a literature review, stakeholder interviews and an in-street survey. All fieldwork was carried out during August 2014.

2.2.2 The literature review was undertaken to find examples of published research and activity in relation to car parking charges and town centre footfall.

2.2.3 Twenty two stakeholders were interviewed on the telephone to find out their views on parking policy, implementation and acceptance in their local area. And, to understand the impact of parking charges on businesses in town centres across Wales. The stakeholders included staff at Local Authorities in Carmarthenshire, Denbighshire, Newport, Swansea and Wrexham. These areas were chosen as they were the focus of The Welsh Government's 2014 report 'Town Centres and Retail Dynamics - Towards a Revised Retail Planning Policy for Wales'. These areas were chosen as they are located across Wales. And, because they are of different sizes and as their retail offerings have different opportunities and face different threats.

2.2.4 The staff at Local Authorities had roles related directly to car parking policy and town centre vitality, as follows:

- Economic development manager
- Traffic management officer
- Planning policy manager
- Economic and business development manager

2.2.5 A key stakeholder at Swansea Business Improvement District was also interviews. Sixteen further interviews were conducted with business owners/ workers whose businesses or places of work were located in the town centres of Aberystwyth, Llanelli, Newport and Ruthin.

2.2.6 A survey was also undertaken with 208 people across the same four town centres; Aberystwyth, Llanelli, Newport and Ruthin. In order to explore the impact of car park charges on their travel behaviour, they were asked about their journey into the town, their reasons for it and their use of town centre car parks. Quotas were put in place to ensure at least 80% of respondents had driven into the town centre. It should be noted that the people interviewed had already travelled to the town centre, therefore this research does not include a measure of people who were deterred from travelling to town centres altogether because of parking costs.

3. Literature review findings

3.1.1 This literature review summarises research and information that is currently available online, relating to car parking charges in Wales and across the UK. The search results indicated that little or no formal academic research has been carried out in this area, other than that done by Local Authorities or organisations such as the Federation for Small Businesses[9]. As such, this review focusses on research of this type, as well as newspaper articles covering parking charges at a local, national and UK level. It focuses on five areas in Wales, following on directly from the areas covered by the Welsh Government's 2014 report 'Town Centres and Retail Dynamics - Towards a Revised Retail Planning Policy for Wales'. The following review provides an outline of the key issues and approaches, as well as the views expressed and conclusions reached.

3.1.2 The full links to the sources used in this review can be found in the footnotes and in appendix 1.

3.2 Car parking charges and footfall in town centres in Wales

Views of local business owners

3.2.1 In general, business owners and their representative bodies say that they want free car parking in town centres. These views are frequently expressed, but are only infrequently backed up by evidence showing a clear relationship between car parking charges and footfall and/ or revenue. In a survey of 58 local retailers carried out by the Welsh Liberal Democrats in 2013 in Rhondda, 100% of the business owners interviewed said that they felt that an increase in car parking charges had affected their business[10]. They also felt that the fact that the perceived vitality of one of the towns in the local area was a direct result of free parking being available there. The Federation of Small Businesses in Wales expressed concerns about the impact that car parking charges are having on local economies, particularly in relation to out of town retail areas where free parking is available[11]. For example, in Ruthin, a local business owner explicitly related the closure of her 83 year old jewellery business to car parking charges[12].

Local Authority activity and reactions to it

3.2.2 Introducing or increasing charges for car parks frequently becomes a contentious local issue. The local press often gets involved in the debate, as do local councillors, particularly those in opposition. In Ammanford, Carmarthenshire, the local press covered a 2014 disagreement by two local councillors about the disproportionate impact car parking charges can have on small towns[13]. Car parking charges were explicitly, but anecdotally, related by one councillor to the lack of footfall in the town (no evidence was supplied). Another councillor expressed

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9 It should be noted, however, that the FSB only represent one section of the business community and that other parts of the business community may have different opinions.

10 http://pontylibdems.org.uk/en/document/town-centre-survey-report-march-2013.pdf

11 http://www.Walesonline.co.uk/business/business-opinion/parking-charges-driving-down-local-6640252 (2014)

12 http://www.whitchurchherald.co.uk/news/124886/ruthin-jewellers-closes-doors-after-83-years.aspx (2013)

13 http://www.southWalesguardian.co.uk/news/yourlocalnews/11282692.Fresh_row_over_Ammanford_car_parking_charges/ (2014)

the view in 2014 that other factors, such as a general slowdown in the economy, can also have an effect[14]. One councillor, the leader of the authority at the time, directly related the loss of their seat, again anecdotally, to increases that their administration had applied to car parking charges and the public's reaction to media coverage of this issue[15].

3.2.3 Frequently, Local Authorities directly relate their decision to introduce or increase charges for car parks to cuts in their overall budget. Isle of Anglesey County Council explicitly related its decision to increase parking charges to having to make savings[16]. This approach is sometimes challenged in the press, and by motoring organisations, who say that parking charges should be used to manage demand[17].

3.2.4 Some Local Authorities have decided to implement free parking in an explicit attempt to motivate the local economy, Flintshire County Council and Swansea City and County Council in particular. The Federation of Small Businesses in Wales commended Flintshire for taking this approach[18]. In July 2014, Swansea Council reduced its hourly parking rates to £1 per hour for up to three hours. In relation to this, June Burtonshaw, a local councillor, said: "We are committed to supporting local businesses in the city centre and do what we can to encourage more people to visit". Information about the effect that this has had on footfall is not currently available.

3.2.5 Cardiff Council introduced car parking charges in five of its town centre car parks in 2012 in an explicit attempt to manage demand and reduce journeys taken by car. This was implemented as part of a project it was running in conjunction with the Welsh Government and Sustrans[19]. The aim of the four-year project is to encourage visitors to travel using more integrated, sustainable and healthier forms of transport than cars. While the evaluation[20] of this project shows that the number of car journeys has reduced, it makes no reference to car parking, charges for it or the effect that the Council's changes had. This follows a similar project, focused on encouraging hospital staff across Wales, which resulted in a saving of £183,000 in reduced car parking capacity[21].

Focus on five key areas

3.2.6 The Welsh Government's 2014 report 'Town Centres and Retail Dynamics - Towards a Revised Retail Planning Policy for Wales' examined threats and opportunities facing town centres in Wales. It focused on five key towns: Llanelli, Newport, Ruthin, Llangefni, and Aberystwyth. These areas were chosen as they are located across Wales. And, because they are of different sizes and as their retail offerings have different opportunities and face different threats. In order to elaborate on this report, this review looks in more detail at car parking strategies in these areas.

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14 http://www.southWalesguardian.co.uk/news/11193769.Fears_that_parking_fees_deter_Ammanford_shoppers/?ref=rss (2014)

15 http://www.cambrian-news.co.uk/news/i/24283/ (2012)

16 http://democracy.anglesey.gov.uk/documents/s3405/Income%20-%20Car%20Parks.pdf?LLL=0 (2014)

17 http://www.bbc.co.uk/news/uk-Wales-27051850 (2014)

18 http://www.Walesonline.co.uk/business/business-opinion/parking-charges-driving-down-local-6640252 (2014)

19 http://www.Walesonline.co.uk/news/Wales-news/motorists-urged-leave-car-home-2028839 (2012)

20 http://www.sustrans.org.uk/sites/default/files/file_content_type/cardiff_ptp_after_survey_report_1.0.pdf (2014)

21 http://www.Walesonline.co.uk/news/health/three-year-sustrans-project-saves-parking-2042610 (2012)

Llanelli, Carmarthenshire, South West Wales

3.2.7 During 2014, local press reported that car parking charges in Carmarthenshire were on the rise. And, that this is the direct result of budgetary pressures faced by the Local Authority. They had to make savings of £31 million over a three year period and this has had an effect on many services, car parking included. As this announcement was made in May 2014, there is currently no information available on the impact that the changes have had. However, there is evidence that the changes resulted in 27 objections from a local population of 182,000[22].

Newport, Gwent, South East Wales

3.2.8 Newport City Council introduced free parking for up to five hours in 2010 and then withdrew the scheme in February 2013[23]. A report published by the council in 2011, indicated that there was a ‘significant’ increase in the use of the council’s town centre car parks in the period immediately following the removal of parking charges[24]. One car park saw an increase of 12% in use when compared to the equivalent period a year earlier. 30% of city centre traders reported an increase in trade and 80% of them attributed this to the removal of parking charges. Subsequent to February 2013, motorists have had to pay £1 to park for up to three hours. The council justified this decision on the basis that the free parking was costing them £850,000 per year and also on the basis of budget cuts. In particular, a funding gap of £8 million in a 12 month period.

Ruthin, Denbighshire, North East Wales

3.2.9 In 2013, Denbighshire County Councillors decided to fund free parking in Ruthin. They did so using one-off money that was given to them to invest in projects that would benefit the local community. This reduced certain on-street parking spaces charges to 10p for half an hour or 50p for up to four hours. This measure was a direct result of lobbying by local businesses for free parking. Follow-up information on the impact of this measure is not currently available.

Llangefni, Anglesey, North West Wales

3.2.10 In 2010, car parking charges were increased in a variety of locations by the Local Authority in Anglesey, including Llangefni. The authority justified this as a means of generating income to prevent cuts to other services, and as a means of implementing a more consistent approach to parking charges across the island[25]. Local businesses and their representative organisations objected to the move, indicating that they thought it would

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22 http://www.carmarthenjournal.co.uk/New-parking-charges-Carmarthenshire-today/story-22843725-detail/story.html (2014)

23 http://www.southWalesargus.co.uk/news/10070496.Free_Newport_city_centre_parking_to_go_in_council_owned_car_parks/ (2012)

24 http://www.southWalesargus.co.uk/news/newport_parking/10089256.NEWPORT_PARKING__Free_parking_brought_in__thousands_of_extra_cars____council_report/ (2012)

25 http://www.bbc.co.uk/news/uk-Wales-11757173 (2010)

damage trade. The head of the local chamber of trade said "there used to be a free car park under the bridge in Holyhead and it was always full, but the day they installed the pay-and-display machine there were just three cars there."

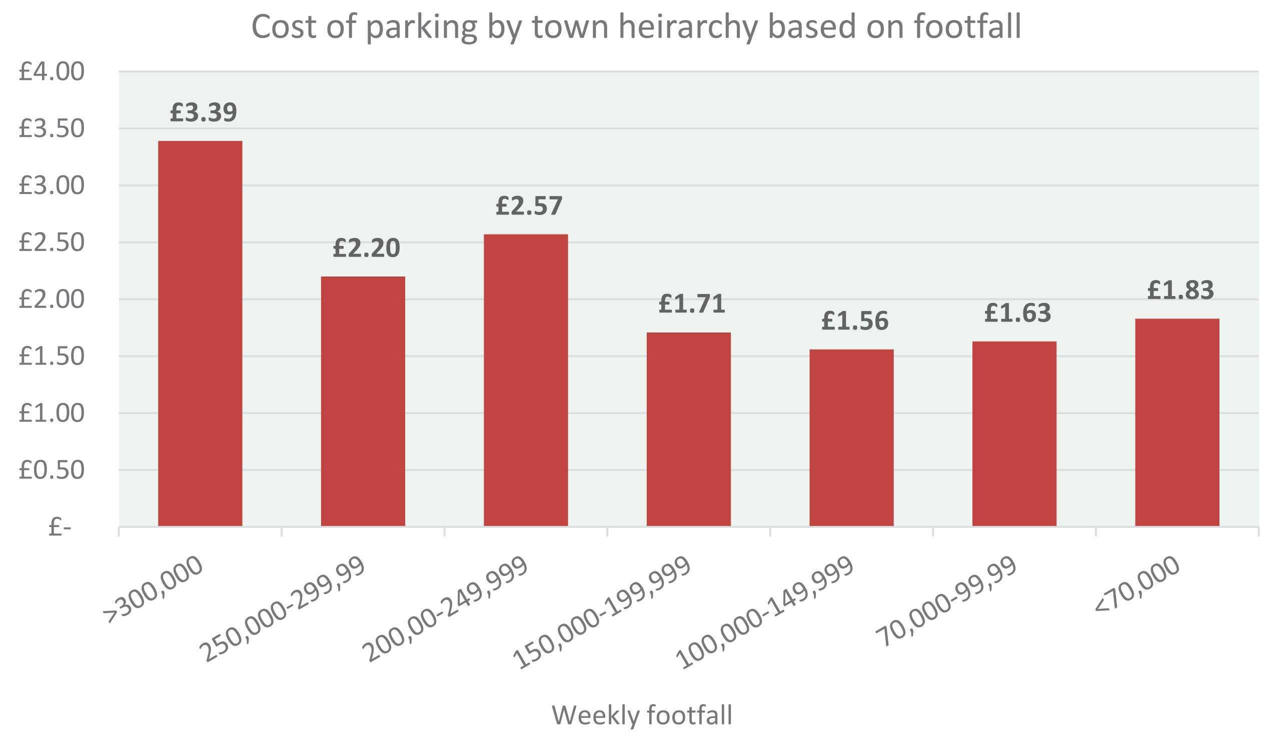
Aberystwyth, Ceredigion, West Wales.

3.2.11 An NCP survey in 2010 indicated that motorists in Aberystwyth take longer, on average, to find a parking space than motorists in any other UK location[26]. In 2014, local businesses have been calling on the Local Authority to take a town centre car park into public ownership. They are keen to see the two hour time limit extended, in order to encourage people to spend longer in the town centre[27].

3.3 Issues across the UK in general

3.3.1 The issues arising across the UK in relation to car parking charges and footfall are similar to those in Wales. However, a little more formal research is available.

3.3.2 Two research based reports have concluded that footfall and car parking charges are, at best, only weakly related, and that a number of other factors may be more important. For example, the British Parking Association showed[28] that car parking charges are not very strongly related to footfall, or to the quality of a town's retail offering. The following chart indicates their findings.



26 http://www.Walesonline.co.uk/news/Wales-news/motorists-aberystwyth-biggest-parking-headache-1894118 (2010)

27 http://www.bbc.co.uk/news/uk-Wales-mid-Wales-26833560 (2014)

28 http://www.britishparking.co.uk/write/Documents/Re-thinking_Car_Parking.pdf (2013)

3.3.3 Furthermore, Yorkshire Forward, a regional development agency, concluded[29] that the key factor affecting the economic vitality of market towns is what the town has to offer, rather than parking. They also concluded that several aspects of parking are more important to customers than price, availability of spaces being the most important factor.

3.3.4 This report also cites some research carried out in Winchester in 1996, subsequent to the introduction of a managed parking regime. Attitudinal surveys indicated that the main motivation for choosing a parking location is convenience rather than expense.

3.3.5 For business owners and the public, charging is a key, contentious issue. The Federation of Small Businesses (FSB) has published a number of reports on local trade and town centre vitality[30,31]. While these repeatedly make the point that there is a link between increasing car parking charges and dwindling footfall and revenue, little is provided in the way of evidence beyond anecdote. They do recognise the need for an integrated approach to town centre transport and parking and that charges can be used to help manage daily demand. However, formal research by Sustrans[32] found that traders over-estimated car use and under-estimate pedestrians, potentially skewing their view on these issues. Furthermore, pedestrians have been shown[33,34] to spend more per month than bus users and car users; they spend less per individual visit, but make more visits, further indicating a bias in the views of business owners.

3.3.6 In 2013, Vale of White Horse District Council carried out some research into the impact that the provision of 2 hours free parking had in the towns of Abingdon, Faringdon, Wantage and in the settlement of Botley. This indicated that 16 local businesses reported an increase in custom after the introduction of free parking, but this increase occurred in only 35% of the businesses surveyed[35]. As is the case in Wales, there does not seem to be any formal research looking at changes in car parking strategies and recorded footfall or business revenue.

3.3.7 As in Wales, Local Authorities are likely to justify increases to car parking charges in relation to budgetary constraints, but others do so in relation to demand management. One Borough Council in Suffolk conducted a survey which indicated that just under 50% of respondents thought that parking charges were a reasonable way to make up part of a budget deficit. This was met with some hostility from the local business community. In response to a local press claim that the Local Authority was profiting from car parking charges, a local Councillor in Paisley said that high turnover is beneficial to local businesses as it means more people can park and visit the town centre to shop[36]. The FSB's view is that "parking policy should be seen as an integral part of transport strategy" and that it should be "tailored to the individual locality with the necessary balance and adaptability to reflect the needs of the

29 http://towns.org.uk/files/Market-Towns-Car-Parking-Research-2007.pdf (2007)

30 http://www.fsb.org.uk/policy/assets/fsb0723%20infrastructure%20transport%20web%20120911b.pdf (2012)

31 https://www.workplacelaw.net/services/news/45283/fsb-urges-local-councils-to-scrap-car-parking-charges (2012)

32 http://chrisabruns.blogspot.co.uk/2009/10/shoppers-and-how-they-travel.html (2009(

33 Mott MacDonald: "Sustainable Transport Choices and the Retail Sector" 2006

34 http://www.tfl.gov.uk/cdn/static/cms/documents/town-centre-study-2011-report.pdf (2011)

35 http://www.vale4business.com/wp-content/uploads/2013/10/Impact-of-2-hour-free-parking-2012-report-FINAL.pdf (2012)

36 http://www.dailyrecord.co.uk/news/local-news/parking-meters-coin-in-4m-3788370 (2014)

individual locality"[37]. Broadly speaking, this is the same view as organisations such as Sustrans take, but their implementation methods for achieving this are very different.

3.3.8 The UK Government's 2013 report 'The future of the high streets'[38] refers to a number of car park charging pilots specifically aimed at improving town centre footfall. This follows the UK government's decision to allow councils to offer as much parking as appropriate in town centres as well scrapping minimum charge rules. The report states that Braintree, in Essex, has introduced[39] parking charges of 10p after 3pm and 10p all day on Sunday. They chose 10p rather than free parking in order to better monitor how the scheme was being used. Figures showed more than 44,000 extra cars took advantage of this scheme over the course of the year, representing a significant increase in footfall in the late afternoons.

3.3.9 One article[40] also indicated that changes to parking arrangements often hit the most vulnerable in our society hardest. Spiralling costs mean disabled residents and carers can struggle to access health and social care services.

3.4 Literature review conclusions

3.4.1 Overall, there is a lack of formal research into car parking charges and town centre vitality, at both macro and micro levels. While there is a lot of information available, it is mostly anecdotal; it is based on the views of local business owners, politicians and, much less often, visitors to town centres. However, it is at least possible that these views are skewed by the respective interests of these groups, or their recollections of sudden drops in trade more than gradual recoveries. Unfortunately, the information available online only rarely attempts to go beyond anecdote into more rigorous analyses of the relationships between car parking charges and footfall. There is no formal academic research available online that links changes to car parking charges and real-world recordings of footfall or business revenue. Where research has been carried out (e.g. by local political groups), it indicates that car parking charges and economic performance are at best only weakly related. In addition, it also shows that a number of factors are at play in highly complex local systems, particularly the availability of spaces and the convenience of parking in relation to where people want to go.

3.4.2 From the review, it appears that the two main agents motivating and implementing changes to car park charges are the small business community and Local Authorities. In general, the small business community wants car parking to be free or as cheap as possible. They are supported in this by the FSB. However, the evidence base for this is anecdotal, and has been shown to potentially be unreliable. Where formal, robust, research has been carried out, it can contradict the views of the business community, for example, by demonstrating that pedestrians visit the town centre more often and spend more per month (but less per visit) than car or bus users.

3.4.3 The FSB does, in common with Sustrans, recognises the need for an integrated, systemic, and highly localised approach to the economic impact of town centre transport policies and infrastructure. Both organisations recognise the importance of using car parking charges to

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37 http://www.fsb.org.uk/keeptradelocal/images/fsbparkinglores.pdf (undated, but post-2010)

38 https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/211536/Future_of_High_Street_-_Progress_Since_the_Portas_Review_-revised.pdf (2013)

39 The report only implies that this is a reduction in cost, and no details are provided about what the costs were previously. Its exact wording is "Braintree has introduced parking charges of 10p after 3 pm and 10p all day on Sunday."

40 http://www.theguardian.com/local-government-network/2012/jan/19/parking-charges-local-government (2012)

manage demand. However, neither go so far as to indicate general principles that can be used across different town centres. Both organisations recognise the fact that local economies are complex systems that have many variables, and that car parking charges are only one of a number of factors that can influence behaviour.

3.4.4 Local Authorities are sometimes more prone than the business community to recognise the need for an integrated, demand led approach. However, they are also more often prone to view car parking charges primarily as a revenue stream, irrespective of their broader context. Their research is also primarily anecdotal and, even where statistical information is included, it is nearly always based on recollections and views, rather than the systematic recording of key data. They are also sometimes unlikely to research, or at least publish their research into, the effect that changes to car park charges have on footfall and small business revenue.

4. Primary research findings

4.1.1 This chapter outlines the findings from our qualitative interviews with stakeholders and the in-street survey of 208 town centre visitors and further qualitative interviews with business owners/ workers in Aberystwyth, Llanelli, Newport and Ruthin. As with the literature review, it focusses on Carmarthenshire, Denbighshire, Newport, Swansea and Wrexham, as these are the areas covered by The Welsh Government's 2014 report 'Town Centres and Retail Dynamics - Towards a Revised Retail Planning Policy for Wales'. These areas were chosen as they are located across Wales. And, because they are of different sizes and as their retail offerings have different opportunities and face different threats.

4.2 Setting the context: an overview of the Welsh town and city centres

4.2.1 At an overall level, the town and city centres that this research focused on are home to a mix of both independent traders and high street businesses, yet the health of the individual local economies is mixed. The largest city centre, Swansea, contains a wealth of theatres, cinemas, hotels, gyms, bars and restaurants. In contrast, Newport's local economy is more heavily reliant on public sector employment, with Newport City Council being the biggest employer in the area, as well as the Prison Service and the Patent Office.

4.2.2 Newport has seen a notable decline in its manufacturing trade, which was felt to be having a negative impact on the overall health of the local economy. Its good transport links and close proximity to Cardiff has led to a perception that retail trade is felt to be moving out of the city. However, the council is currently planning a multimillion pound investment scheme to build a new retail complex in the city centre, with a view to boost footfall and consumer spend in the city.

> *"The city centre is fairly poor and many of the high street shops have relocated." Local Authority*

> *"There's hardly any businesses left in the town centre now all the big boys have pulled out; Marks and Spencer, Next and Topshop have all gone. There's a new development supposed to be finished next year but it should have happened in 2010." Business owner/ worker, Newport*

4.2.3 These larger towns and cities, in particular, are feeling the effects of out of town retail developments; there was a general assumption amongst stakeholders that it makes more 'financial sense' for high street retailers to move out of the centres into the developments where they will not be charged business rates. Furthermore, these developments were often felt to be more suitable retail spaces for high street retailers to thrive in, for example they can offer larger retail units and more car parking spaces etc.

> *"Modern retailers are looking for larger premises – in Newport there are listed buildings… out of town, the parking is free, the retail space is there." Local Authority*

4.2.4 Business owners/ workers cited the increasing domination of out of town retail developments as having a negative impact on footfall in their local town centre, and therefore on their trade. They also suggest that the growth of online retail is making it ever more difficult for town centre businesses to compete and grow.

> *"It's has a detrimental effect on the town centre because the majority of people go out of town to these centres where you have your Tescos, Marks and Spencer, Boots and Debenhams all the multiples which have gone out of the town to the outskirts." Business owner/ worker, Llanelli*

"I think people are too keen to shop outside in the big supermarkets or on the internet. This has had a serious impact on my business, because it's not allowing them to do anything in town. Why bother coming into town when you can do it online and not bother about parking and everything." Business owner/ worker, Aberystwyth

4.2.5 In contrast, in smaller towns, such as Rhyl and Llangollen, the health of the local economy is more seasonal, due to their heavy reliance on the tourism trade. Shops often have to close during the winter months, so it is particularly important for these towns to capitalise on increased footfall, and tourist spending, during the summer.

4.2.6 Overall, there was awareness among both councils and business owners/ workers that generating, and retaining, footfall is key to keeping the local economy healthy and thriving. Councils and businesses alike acknowledged that giving consumers and retailers a reason to come into the town or city centre is vital to ensuring that the businesses in the local area generate revenue.

"Foot flow – like anywhere else, is key. You've got to bring the people in, to bring the money in. We operate 5 core development groups, which are focused on trying to do that. If you haven't got foot flow, you haven't got customers." Swansea BID

"The town centre needs more shops to open - that's the main thing." Business owner/ worker, Ruthin

4.3 The current car parking strategy landscape

4.3.1 Most of the Local Authorities that participated in this research have a variety of charging strategies in place, as summarised in the table below:

Swansea	Newport	Denbighshire	Carmarthenshire	Wrexham
Council owned car parks - £3 for 3 hours	Council owned car parks - £1 for 3 hours	County wide consistent strategy – 50p for 2 hours, £4 for all day stay during summer Smaller town, e.g. Denby; 10p for 30 mins, 50p for 1 hour, £1 for 4 hours	Different approaches dependent on context; charges are higher in Carmarthen as it is more vibrant economically and has less out of town competition. About to introduce charging on Sundays, up to 9pm and for blue badge [41]holders	Council owned car parks - £1 for 1 hour, £1.50 for 2 hours, £4 all day One multi-story car park is free after 3pm
NCP car parks (funded by Swansea BID) - £3 for 3 hours	Private car parks – free for first 2 hours			Two large supermarket chains have free car parks a few minutes' walk from town centre

[41] Blue badges allow people with disabilities to park closer to their destination than they might have been able to otherwise.

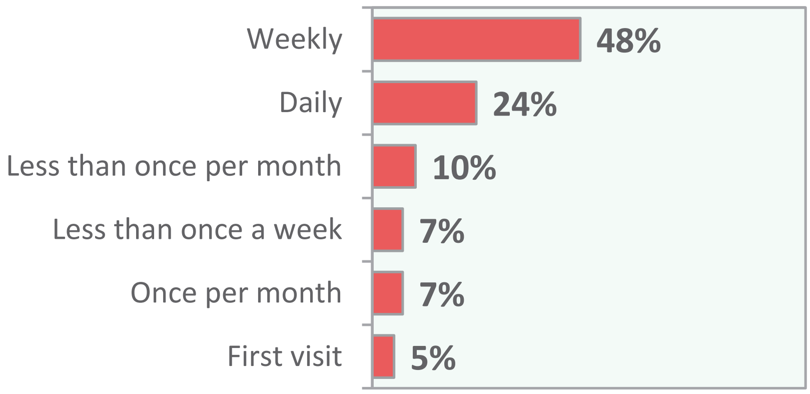
4.3.2 Whilst the majority of the Local Authorities surveyed implement various car parking charging initiatives, they tend to have used the same basic charging strategy for the last few years; mostly guided by council budget cycles.

4.3.3 Most of the councils tend to operate either Pay & Display or pay-on-exit payment systems and enforce not payment using fines.

4.4 Travel patterns and motivations for visiting town centres

4.4.1 The following charts provide more detail on the background to visits to town centres reviewed in this study. They show the frequency with which visitors travel to town centres, and their reasons for visiting the town centre in which they were surveyed. They are based on an in-street survey of a total of 208 visitors to Aberystwyth, Llanelli, Newport, and Ruthin during August 2014.

Chart 1. How often do you travel into this town centre?

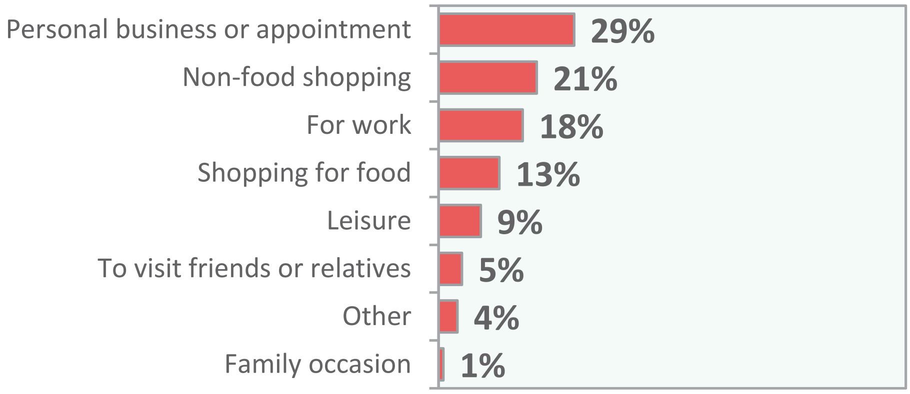


base = 208

4.4.2 Chart 1 shows how often people travel into the town centre within which they were surveyed. It shows that a considerable majority of people (72%) visit the town centre on at least a weekly basis. A quarter of people visit it daily (24%).

4.4.3 Chart 2 shows the main reasons behind visits to the town centre. It indicates a wide variety of different reasons. Visitors were most likely to use it for shopping, with 34% of them doing so in total. Visitors were next most likely to visit the town centre on personal business or for an appointment, with 29% of them doing so. Just under a fifth mainly visit the town centre for work.

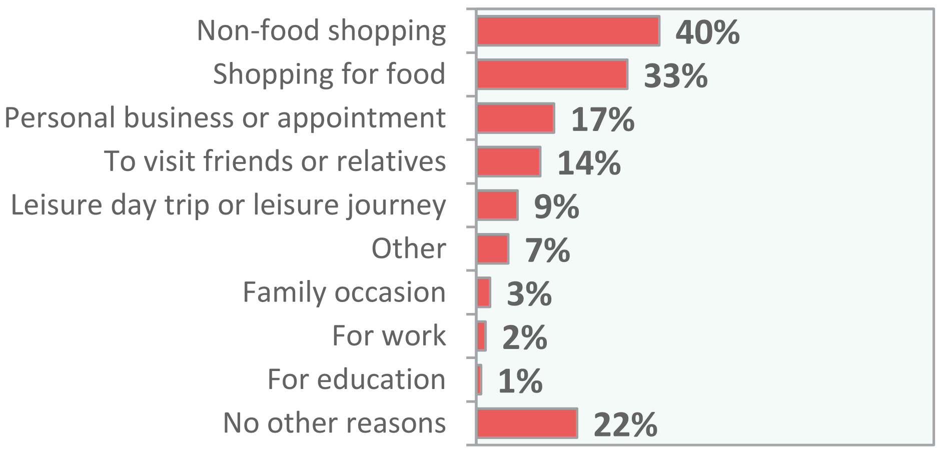
Chart 2. What is the main reason for your visit to this town centre today?



base = 208

4.4.4 Chart 3 shows the other, additional, reasons why people visit the town centre. Shopping again was the most was 'no other reasons', indicating that just over a fifth of visitors visit the town centre for only one reason.

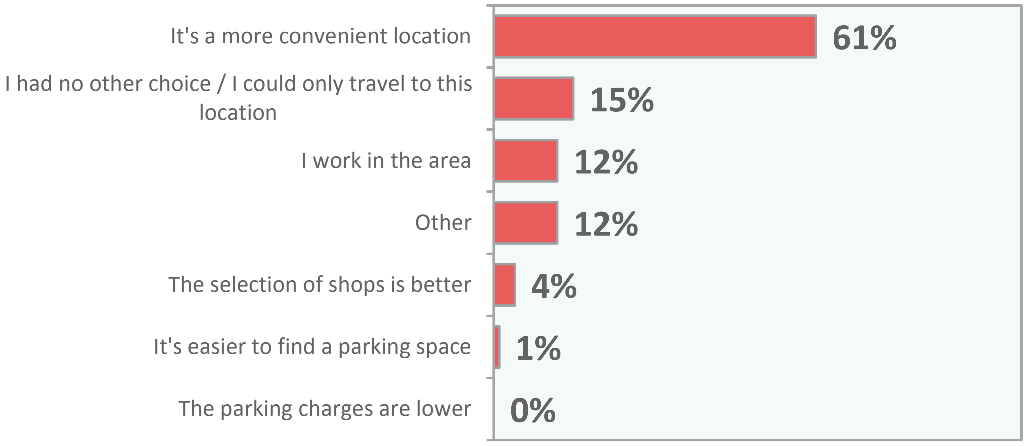
Chart 3. Are there any other reasons that you visit this town centre?



Base = 206

4.4.5 Chart 4 shows the reasons why visitors decided to travel to a particular town centre rather than somewhere else. Convenience was the most popular reason behind this decision. 61% of visitors mentioned this, more than four times as many as the next most popular choice.

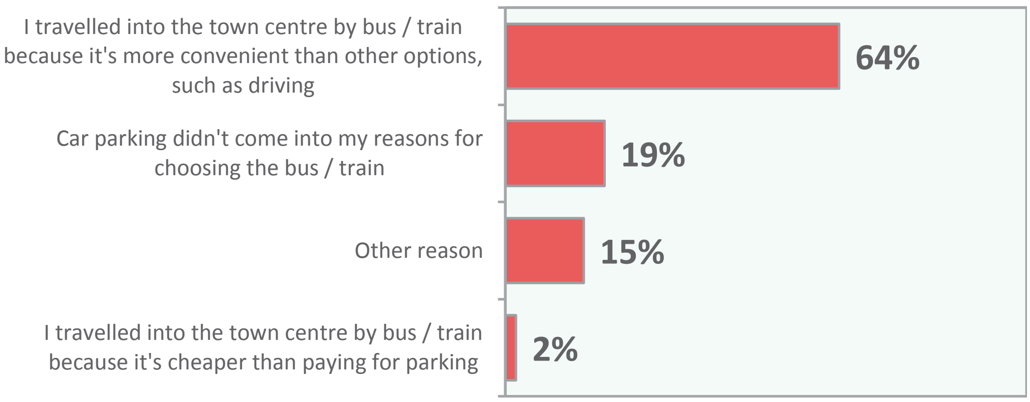
Chart 4. Why did you decide to travel to this town centre today instead of somewhere else?



base = 208

4.4.6 Chart 5 shows the reasons why people chose to use public transport. Convenience was the most popular reason (64%), with more than three times as many responses than the next most popular choice. Only 2% of public transport users said they chose to travel by bus or train because it was cheaper than paying for car parking.

Chart 5. Which of the following statements best describes you ....?



base =47

4.4.7 Around two-thirds of the business owners/ workers interviewed drive to work and those who don't suggest that it's either because they live locally and therefore walk, or cannot afford to pay for parking all day, every day.

4.4.8 Around a third of these businesses have their own parking on-site; ranging from 4-30 spaces depending on the size of the business. Some of those who do not park on-site are able to park near to their place of work – either in a designated car park or on-street parking a short walk away. However, business owners/ workers in Newport, Ruthin and Aberystwyth in particular noted the lack of parking for workers in the town centre.

> *"That's the problem - there are very limited spaces in Newport. There are places nearby but there is a lack of spaces for business users." Business owner, Newport*

> *"If I couldn't get dropped off I don't know where I could park. I would have to leave the car and walk from home." Business owner, Aberystwyth*

> *"They have taken most of the parking in Ruthin away, so I have to pay for it and go wherever is available." Business owner, Ruthin*

4.4.9 Some also suggested that the cost of parking in the town centres was discouraging workers from driving to work.

> *"For people working in the centre who are paying £2.20 per day, six days a week it does mount up." Business owner, Llanelli*

4.4.10 Car parking was spontaneously mentioned by most of our qualitative interviewees, as having some level of impact on the local economy and local business growth. However, car park charging was not always felt to have the greatest impact; the availability of spaces, traffic flow and parking signage were all felt to have the same effect, if not a bigger, on the local area and peoples' decision to visit it.

> *"It's not so much the parking charges, but parking availability is horrendous. It has become more difficult to park, they have reduced the spaces and they have also placed restrictions on the parking which only allow you to park after 1pm. There are only loading bays or disabled spaces to park." Business owner/ worker, Aberystwyth*

> *"Some people say they drive round and round trying to find a space nearby, rather than going down the road to the car parks. To be honest I don't think the cost is bad compared to other towns - it's the availability." Business owner/ worker, Ruthin*

4.4.11 There was, however, a general sense of awareness of car parking charging being responsible for changes in footfall levels in town and city centre – particularly amongst business owners/ workers; some of them had cited falling custom as at least partly due to car parking charging. Yet, it is important to note that this was viewed as being part of a mix of factors that have an impact. It was felt to be unlikely that there is always a direct and exclusive causal link between car park charging and footfall.

> *"Car parking has a knock-on effect on businesses coming into the area – they certainly consider it, because if it's cheaper or free car parking, you're going to get more users. But it's more than that, it's how you market it, how you get to the car park, what's on for people to come to – car parking has its place, but it's part of a mix." Swansea BID*

> *"I don't think there are a lot of people coming into the town. There's always a problem in finding somewhere to park. You can have two hours somewhere then you have to move, so you can't shop properly as you're constantly thinking about your parking ticket." Business owner/ worker, Aberystwyth*

"A shopper coming to a town centre doesn't just make a decision based on the cost of parking. They consider a whole range of things – accessibility in the town, can I park close to the town centre … are there the shops that I want to visit…" Local Authority

"It needs to have good shops to attract people, parking isn't the only problem." Business owner/ worker, Ruthin

4.4.12 It was also suggested that the overall offering of the town and city centres was far more likely to have more of an impact on footfall than car parking charging, and that the offer and charging are viewed by visitors almost as a 'trade-off'; for example, people will be willing to pay more for parking in towns or cities where there are more high street retailers, restaurants, and leisure activities. It was also felt that out of town shopping developments are taking trade out of town and city centres, not purely because they offer free parking, but mostly because they often offer a greater variety of shops and other experiences.

"The difficulty is that because there's not that much in Newport city centre itself, what exactly are you paying for? If you go to Cardiff, you don't mind paying £6 or £7 because it's got a whole host of shops. You go to Newport and there's not much there." Local Authority

"We have Cwmbran up the road, which has free parking and there are more shops there too, so I think that people go there or to Cardiff up the road." Local Authority

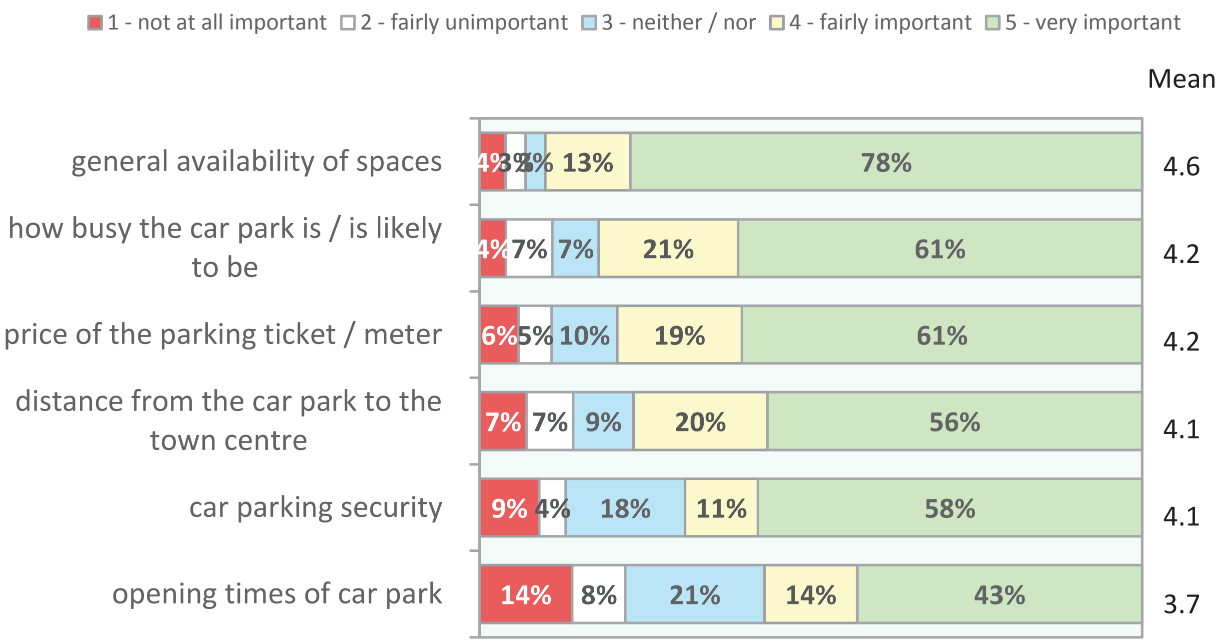
"You've got to make people want to come here to then take advantage of the car parking." Swansea BID

"You pay an awful lot for the parking in Liverpool, but you're prepared to pay it because the quality of the offer is there. I don't want to dismiss the fact that car parking has an influence, but I think what is more of a determining factor is the quality of the offer that's available. People will be prepared to pay for parking if the offer is good enough." Local Authority

"It's affected us a lot. We have lost a lot of customers due to an out of town shopping centre, which also has free parking." Business owner/ worker, Llanelli

4.4.13 Our in-street survey also demonstrated a complex interplay between the factors that relate car parking charges and visits to town centres. It shows that these factors inter-relate in different ways in different locations, depending on a variety of contextual factors.

Chart 6. How important are each of the following things when considering whether to drive to the town centre and park there?



bases = 160, 160,161,158, 160 , 157 respectively

4.4.14 Chart 6 shows some factors that car users take into account when deciding whether or not to drive to a town centre; in particular, it shows the level of importance that they attach to a variety of features of car parks. Overall, car users were more likely to say that each feature is important than they were to say that it is unimportant. They were most likely to say that the general availability of spaces is important, with 91% of them doing so. They were next most likely to say that the extent to which the car park is busy, or the extent to which they expect it to be busy, is important to them (82%). The price of parking was third most likely to be considered important (80%).

4.4.15 There were some significant[42] differences between the visitors surveyed:

- Visitors to Aberystwyth (100%) were significantly more likely than visitors overall (91%) to say that the general availability of spaces is important to them.
- Visitors to Llanelli (73%) were significantly more likely than visitors overall (57%) to say that the opening times of the car park are important to them.

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[42] Where significance is specified in relation to the survey data, it is used to indicate that a difference is significant at the 5% confidence interval.

- Visitors to Llanelli (84%) were significantly more likely than visitors overall (69%) to say that car parking security is important to them.
- People who were visiting for non-food shopping (89%) are significantly more likely than visitors overall (80%) to say that the price of the parking/ticket meter is important to them.
- Visitors who travel to the town centre for work (58%) were significantly less likely than visitors overall (82%) to say that the extent to which the car park is busy.

4.5 Influences and constraints on implementing car parking charging strategies

4.5.1 Most of the Local Authority representatives interviewed suggested that they are constantly working to find a balance between generating sufficient revenue through car parking charging, either to meet council budgets or to cover the cost of running the car parks, and keeping charges low enough so as not to put people off coming into the town/ city centre. Several of the local businesses surveyed were also aware of this pressure that councils are under.

"Whilst we don't make a lot of money from the car parking, they need to be cost effective, to be self-sufficient…£1 for three hours is reasonable…we've got to think of the economic realities that we have to maintain those car parks…in in ideal world you'd like to try to make some surplus on it…" Local Authority

"There's an assumption that that we will get a certain amount of income from car parking." Local Authority

"Anything that we do in terms of car parking charges has to go through our political process and our elected members make the decisions. They make the final approval as to whether we can put the prices up – that has political involvement. Elected members are mindful of the town centre and keeping the town centre flourishing, but I would say the last couple of years they've also been mindful of budget pressures." Local Authority

"It's an awkward situation because the Government is reducing the amounts of grants that they give each council. The council then have to find ways of reimbursing that and they are looking at increasing charges." Business owner/ worker, Llanelli

4.5.2 Overall, the process of implementing charging strategies was felt to be somewhat constrained by the 'political' pressures of revenue generation for the council. For example, Denbighshire County Council suggested that the income generated by their Pay & Display car parks was £1.3million from 2012 to 2013; if they were to reduce charges, they would be under pressure to generate that revenue elsewhere.

4.5.3 Similarly, Carmarthenshire County Council suggested that they are looking to make changes to their charging strategies this year, with the intention of generating revenue to subside cuts being made elsewhere by the council; this will include charging on Sundays, charging for disabled permits/ spaces and charging up until 9pm.

"It's simply revenue generation. The authority is facing severe cuts from the Welsh Government. In effect, it's about complementing the source of income and about getting maximum benefit from our car parking stock." Local Authority

"The main constraint is financial. Where we are currently, because of the latest settlement figures from the Welsh Government, we are looking for massive, massive savings across the board, and in that context – offering free parking

means we would have to find service savings of £1.3million somewhere." Local Authority

"I know it's quite a hot topic politically – they've got to balance it out between income for the council and footfall. I guess the idea is that the charge is so small that it won't have much impact on footfall." Local Authority

4.5.4 Furthermore, these council pressures were not always felt to be financial; in some cases, for example at Wrexham County Council, it was suggested that planned council sustainability schemes were likely to go on to have an impact on car parking charging. The council is currently working to promote sustainable travel, which was felt to rely, at least partly, on increasing car parking charges as a way of motivating people not to drive into the town centre.

"They're trying to switch the focus from the car being the primary mode of transport … they talked about Park and Ride, but to get people to shift onto Park and Ride, car parking charges would need to basically discourage people from using town centre parking." Local Authority

4.5.5 Denbighshire County Council were aware that the Welsh Government are willing to consider reducing the budgeted revenue expected from car parking, but only if the council could provide measurable evidence that reducing charges would have a positive impact on the local economy; the council noted they would struggle to do this.

"To be fair, the chief executive has publicly stated that he's not wed to having car parking charges and he's prepared to look at it, but he's only prepared to do that if he can be provided with a measurable and clear indication of the economic positive impact that it's having – I think we would really, really struggle to provide a compelling case to convince him that it's having such as positive impact on the economy that it's worth the cost." Local Authority

4.5.6 There is felt to be more flexibility when making changes to charging strategies in privately owned car parks, such as the NCPs funded by Swansea BID. They suggest that having the ability to work with, and listen to, local businesses enables them to make changes that have a positive impact on both the health of the local economy more generally, as well as on the revenue generated from the car park itself.

"It was working, but the businesses wanted us to change it because they wanted people to stay for more than an hour. So we changed it to £3 for 3hrs. So there's an element of flexibility based on having enough information." Swansea BID

4.6 Impact of car parking charges on town and city centre footfall

4.6.1 Measuring the impact of car parking charging on footfall

4.6.2 Among the local areas covered by the interviews, there are currently very few strategies in place for directly measuring the impact of car parking charging on footfall. That said, some councils have measures in place to monitor car park revenue against car park usage. Carmarthenshire County Council, for example, does this, particularly in relation to increases in car park charges. Each time they have increased the charges, they notice an immediate decrease in usage and revenue. However, over the course of a year, usage tended to return to what it was before the price increase, resulting in higher revenue. Over the last four years, they have taken a deliberately incremental approach to the amounts by which they have increased car park charges. It is easy to see that this same demand curve might not be replicated with especially large or small charge increases.

"We don't consider that there's a detrimental impact on footfall…the fact that there's a new charge or an increased charge it doesn't, in our experience, prohibit or diminish the use of the town centre by either commuters or shoppers. We've increased charges for the last four years." Local Authority

4.6.3 Similarly, Newport City Council undertake formal research into footfall; a camera in the city centre is used to measure footfall on a monthly basis, which can then be analysed against car parking charging rates month by month.

Chart 7. Footfall in Newport town centre, March 2007- July 2014

The chart above sets out the weekly average count by month.
Each month comprises either four or five complete weeks, and complies with the definition used by the British Retail Consortium.
Source: Newport City Council

4.6.4 Chart 7 shows average monthly footfall levels in Newport from March 2007 to July 2014. It also shows when two significant changes were made to car parking charges. In December 2010, two hours free parking was introduced. Substantial redevelopment work was taking place in Newport town centre so the Local Authority decided to remove charges for parking up to two hours in order to encourage people to visit while the work was going on. This was left in place until February 2013 when budgetary pressures meant that they had to introduce a small charge, £1 for up to three hours, in order to cover the costs of running the car parks.

"In an ideal world, we'd have liked to have kept the 2 hours free parking but we just couldn't do that…people are reluctant to pay for parking these days, particularly as we're being attacked on two sides by the retail park and Cwmbran, the new town to the north of us…On the whole it is working." Local Authority

4.6.5 This type of evidence is highly unusual amongst the Local Authority representatives interviewed. All were able to provide details of the changes that they had made to car parking charges but this was the only evidence available, beyond anecdote, which related them to robust measures of footfall. In addition, Newport City Council admit that they find it difficult to relate footfall and car parking charging directly, since there are so many other factors at play, such as the relocation of high street retailers.

4.6.6 Wrexham County Council also mentioned that they have some measures is place to measure car parking usage, rather than footfall specifically. For example, they look at the transaction data from Pay & Display machines and have interactive signs in some of their car parks which can be used to measure car park usage.

4.6.7 Over three-quarters of the business owners/ workers interviewed suggested that car parking options have an impact on the number of people coming into the town centre and therefore on their custom. It was noted that parking availability and cost were the biggest parking issues.

> *"It could be improved, the problem is the cost and the amount of car parking facilities which I think puts a lot of people off." Business owner/ worker, Llanelli*

> *"I've noticed the fall in custom, not just for us but the shopping centre and town as a whole. As well as the car parking going up they have also stopped a lot of bus services from the rural areas so we don't get as many people coming in via the bus services either." Business owner, Llanelli*

4.6.8 Our in-street survey provides more detail on the extent to which visitors attach importance to different, specific features of car parks and car parking strategies when deciding whether to visit town centres.

Chart 8. How much more or less likely are you to make more journeys to this town centre if there was/were…(mean score out of 5 where 1 is 'not likely' and 5 is 'very likely')

base = 208

4.6.9 Chart 8, above, shows the extent to which different features of car parks were more or less likely to encourage visitors to make journeys to the town centre in which they were surveyed. Visitors were most likely to say that they would visit the town centre if there were links between car parks and shops that could entitle them to discounts on car parking charges (62% of visitors say this). Visitors were next most likely to say that better accessibility of car parking spaces is important (60%) followed by there being more car parking spaces available (58%). Around half of visitors (52%) said cheaper car parking would encourage them to make more visits. Visitors in Newport were significantly more likely to say they would make more visits to the town centre across almost all of the statements, compared to all other locations.

4.6.10 Examples of car parking charging strategies that have had a positive impact on footfall

4.6.11 Several of the Local Authority representatives interviewed noted various charging strategies that had been, at least anecdotally, responsible for increased footfall in their town or city centres.

4.6.12 One example comes from Denbighshire County Council who, for the last few years, has offered a day of free parking during the Christmas period in each of their town centres. This was an attempt to encourage more people to come into the town do their Christmas shopping. Although there was no robust evidence to suggest that this initiative had an impact, it was felt by our contact at the Council that more people were coming into the town on those free days and were spending slightly longer there.

4.6.13 Furthermore, Denbighshire County Council trialled free parking after 3pm across all of their car parks with the aim of encouraging people into the town centres. Again, there was felt to be an impact, since footfall was perceived to be slightly higher than usual in the afternoons.

4.6.14 Newport City Council offered two hours free parking whilst there was construction work taking place in the city centre, ending in 2013, and suggested that footfall did increase because of it, as did local businesses in the area.

> *"It was noticeable when car parking charges were dropped that footfall did increase. And, when the charges were brought back in, footfall decreased a little." Local Authority*

> *"People do go to Cwmbran as it's free; that's where all the Newport people go now. But, when we do offer a cheaper deal for parking there is a pick-up - when they made two hours free we did see an increase, but it has levelled out now." Business owner/ worker, Newport*

4.6.15 Newport City Council also noted that when the charges were re-introduced, there was 'bad press' from both businesses and members of the public, suggesting that lowering car parking charging not only had a positive impact on footfall, but also on perceptions of the city, and its council, more broadly.

> *"When we introduced the free two hours, it actually went down very well. We did it while we were doing a lot of work in the city centre and there was a lot of disruption so we basically said, look, as a bit of a sweetener we'll introduce that. Last year, the charges were brought back in. That had negative press, obviously, because people obviously like something for free." Local Authority*

4.6.16 The local businesses surveyed in Newport suggested that the free parking strategy in Cwmbran was working so successfully that it drawing trade away from Newport.

> *"If you go to Cwmbran it's free parking and there are hundreds of car park spaces and it's only five to ten minutes' drive from Newport. It has a terrible impact on Newport - we prefer to go to Cwmbran." Business owner/ worker, Newport*

> *"Cwmbran is somewhere it works well - in the town centre they have free parking." Business owner/ worker, Newport*

4.6.17 Another example comes from Llanelli where one business owner/ worker interviewed saw a significant increase in sales as a result, at least partly, of a free parking strategy.

> *"Two weeks ago we had a Retrofest (local festival) and for the two days it was on the parking was free in the whole of the town and we nearly tripled our business." Business owner/ worker, Llanelli*

4.6.18 In Swansea, it was suggested that marketing any car parking charging changes in the right way is particularly important in maximising impact on footfall. The Swansea BID knew that the people coming into Swansea city centre from more remote parts of West Wales were more likely to be staying for a longer period of time than people living closer to the town. Therefore, they implemented various schemes to appeal to these people, for example, a loyalty card at the NCP car parks or including a voucher for a coffee shop in the city centre with the parking ticket to encourage people to spend longer in the city. The latest NCP statistics showed that, on average, people are staying for longer in the car park.

"People are now staying into hours two, three and beyond." Swansea BID

4.6.19 Examples of car parking charging strategies that have had a negative impact on footfall

4.6.20 A few of the Local Authority representatives interviewed also suggested that changes in car parking charging could also have a more detrimental impact on footfall.

4.6.21 Denbighshire County Council and Wrexham County Council both tried offering completely free parking in their car parks and found several of the parking spaces were consequently used up by people working in the towns, reducing the number of spaces available for shoppers/ visitors. As a result of this, they suggested that if they wanted to implement a similar scheme in future, it would need to be in a way that prevented the same thing happening, for example only offering the first few hours for free.

4.6.22 Furthermore, the aim for the free parking strategy in Wrexham's case was to encourage new visitors to come into the town centre. This was not achieved, since town workers were taking up the spaces.

"We had a multi-story car park with historical usage around 45-55% … we wanted to try to support the local businesses, so we made one of the multi-story car parks free. And that car park over a short period of time became around 100% full, so you were almost a victim of your own success. People were going in there trying to park, but were just circling and never getting a space." Local Authority

"The scheme was intended to bring new visitors into the town centre. Anecdotally, it was used by staff; workers in the town centre took advantage of it for the free parking, so whilst it made the car park busy it didn't generate the new business it was intended for. We still do that now, but only after 3pm." Local Authority

"Straight free parking in a lot of our town centres is not the thing to do … partly because the experience where we've done things like that before is what tends to happen is all the shop workers come and fill up all the spaces and stay there all day. So if we were going to do something, we'd have to do it in a way that would prevent that sort of thing happening. So it might be that the first 4 hours are free or whatever." Local Authority

4.6.23 Car park charging was also felt to have an impact on the towns and cities in which businesses choose to locate themselves in, which in turn has an impact on footfall.

"Car parking has a knock-on effect on businesses coming into the area – they certainly consider it because if it's cheaper or free car parking, you're going to get more users." Swansea BID

4.6.24 Newport City Council suggested that several local businesses felt that car parking charges were partly responsible for driving shoppers out of the city centre to find cheaper, alternative options.

"All the retailers want us to abandon charges altogether…. That's not going to work economically for us because we need to maintain the structures." Local Authority

4.6.25 Whilst, clearly, there are some example of charging strategies that have had a notably negative impact on footfall, there was a sense among a few of the Local Authority representatives interviewed that charging has very little impact on footfall altogether. For example, Denbighshire County Council dropped the car parking charges in some of their towns for a period of time and did not see any change in footfall.

"In some towns we did drop the parking charge for a while, but it didn't seem to have any measurable impact on footfall or performance of the town centres." Local Authority

4.6.26 Furthermore, the councils from smaller towns in particular suggest that their car parking charges are so minimal that the impact charging has on shoppers' decision to come into the town centre and the length of their stay is likely to be fairly low.

"It's not big money that we ask in terms of car parking. I don't know that removing that is going to make a huge difference." Local Authority

"I'm not convinced that putting the car parking charges down to zero is going to have much of an impact – you may attract a few more, but it's not going to be considerable." Local Authority

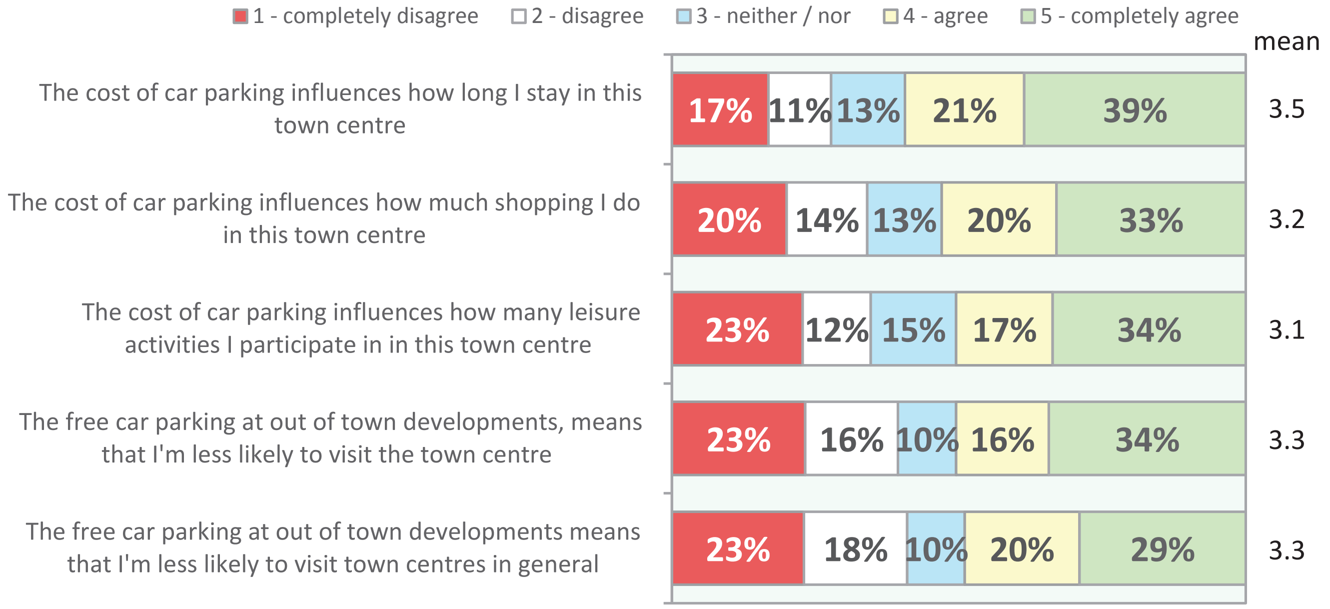
4.6.27 However, even if charging was felt to be have a minimal impact in these areas, it was also suggested that there is a 'tipping point'; where if parking charges were to be increased considerably, people would be likely to start avoiding parking in the town centre for that reason.

"We don't consider that there's a detrimental impact on footfall…the fact that there's a new charge or an increased charge doesn't, in our experience, prohibit or diminish the use of the town centre by either commuters or shoppers. We've increased charges for the last four years. However, we don't think we can impose any further charge increases after the first of January next year. This is our opinion. We feel that we have reached a threshold and we don't intend, as officers, to promote a future recommendation to make more money for the council. We think that we have reached the maximum that we can possibly charge." Local Authority

4.6.28 In our survey, visitors were asked about the relationship between car parking charges and their behaviour in relation to visiting the town centre. In particular, they were asked about the extent to which it would influence their decisions to visit the out of town developments with free parking, the time they would stay in the town centre, the amount of shopping they do, and the number of leisure activities they participate in.

4.6.29 Chart 9 shows the extent to which visitors agree with statements about the relationship between car parking and their behaviour in the town centre. It shows that they were likely to agree (60%) that the cost of car parking influences how long they stay in the town centre in which they were surveyed. They were also likely to agree that the cost of car parking is related to their spending in the town centre (53%). 50% of visitors agreed that the free parking at out of town developments means that they were less likely to visit a particular town centre and also that the cost of parking was related to their use of leisure facilities in the town centre. They were least likely to agree that the free parking at out of town developments means they were less likely to visit town centres in general (49%).

Chart 9. How much do you agree or disagree with the following statement?



4.6.30 Visitors in Newport were significantly more likely to agree with all of the statements, while visitors in Aberystwyth were significantly less likely to agree with all of the statements. In addition, other notable significant differences between sub-groups include:

- People who are visiting for food shopping were less likely to agree that the cost of car parking influences how much shopping they do in this town centre.
- People who are in town for a business appointment are less likely to agree that the cost of car parking influences how long they stay in this town centre.
- People who travelled by bus are less likely to agree that the cost of car parking influences how long they stay in this town centre.

4.6.31 The role of out of town retail developments

4.6.32 As mentioned previously, out of town developments were unanimously cited as being, at least partly, responsible for having a detrimental impact on footfall and business trade in the town and city centres.

4.6.33 The fact that most of these developments offer free parking was felt to give shoppers a reason to go to them over the town or city centres. However, it was noted that the free parking was one of several motivating parking factors, including better availability of spaces and easier navigation around the car parks. Car parking was also not felt to be only reason for people going out of town; the increased retail offering was noted as the determining factor.

"The free parking is a factor, but I don't think it's the determining factor. I think people are choosing to go there [Cheshire Oaks Designer Outlet] because of the range of shops and goods that are available. That's allied with being able to park quite easily." Local Authority

"In Llanelli, the decision was taken years ago to create an out of town shopping area, which has been a roaring success, but it has had a detrimental impact on the town centre…so we are struggling and we are focussing on amenity and leisure; markets and so on." Local Authority

4.6.34 The business owners/ workers interviewed felt the impact of car parking charging on footfall generally, which can in turn have a negative impact on their custom. There is a general acknowledgement, among the businesses interviewed, that people are replacing town centre shopping trips with ones to out of town developments, since parking is free and much less of a hassle.

"It has limited the amount of people who actually come in to the town centre. I know people whose businesses have been affected by this. We have an out of retail area where parking is free so people tend to go there instead as they don't have to walk far or pay." Business owner/ worker, Llanelli

"It makes a huge difference to us. People are having to park out of town and either walk or get a lift to reach us... If you go to the next town, Cwmbran, it's all free parking, which has also reduced the number of customers coming into the town centre." Business owner/ worker, Newport

"They have an effect as people moan about the car parking and go elsewhere where it is free such as the craft centre, the Tescos and Co-op for around 2 hours. They tend to go there and not get to our end of town." Business owner/ worker, Ruthin

"A lot of them do go to the out of town areas due to free parking there and also more spaces." Business owner/ worker, Llanelli

4.6.35 The survey results shown above in chart 9 indicate that around 50% of visitors, to town centres, overall, agree that out of town developments make it less likely that they will visit the town centre. This feeling is more pronounced amongst people in Newport and people aged 25-44. It is less pronounced amongst people in Aberystwyth and people who had travelled over 16 miles to get to the town centre in which they were surveyed.

4.7 Best practice and recommendations

4.7.1 A consistent recommendation coming out of our stakeholder interviews was the importance of considering the nuances of any town or city centre and tailoring car parking charging strategies to reflect these. For example, it is generally felt that the better the retail offering in an area, the more people will be willing to pay for parking.

4.7.2 Furthermore, the type of people parking in the town or city centre must be considered, for example offering blanket free parking in areas where there are high numbers of businesses is unlikely to draw in more shoppers, since the free spaces are taken up by workers. As a few of the councils have suggested, these charging strategies have worked most effectively when taking this into account, for example only offering free parking before or after a certain time during the working day.

"You've got to look at what the town or city offers first of all and then tailor your car parking charges to that offer. So, for example, if you're Cardiff and you offer hundreds of shops and businesses then you could get away with charging a bit more because the demand is there and people will be willing to pay more. If you're like Newport and your city centre is struggling, then you've got to be careful in terms of your car parking charges … It's about matching demand and supply and finding an equilibrium." Local Authority

"My view is that it's the offering that's probably having the biggest impact. It's very easy to pick on the Local Authority and say that you are at fault because you are charging for parking … people will go where there's an offering … my wife wouldn't contemplate the town centre because it hasn't got the offering … the quality of the offering." Local Authority

"Each town, each location, is quite unique and you have to take into account your localisms … you have to look at the mix you've got, the sort of business you've got, rather than being able to lift what works for Wrexham and take it somewhere else." Local Authority

4.7.3 Several of the business owners/ workers interviewed also acknowledge this issue and suggested that more parking should be made available solely for worker use, to avoid shopper spaces being taken up.

"I would make the loading bays permit able for businesses not just for big vehicles. Any business should be able to offload as they might only be around the corner or next door. I would designate an area where business people can park in Aberystwyth." Business owner/ worker, Aberystwyth

4.7.4 It is also felt to be important to approach car parking charging as part of the parking offering as a whole. For example, the location of the car parks, availability of spaces, signage etc. must be considered and are often noted as being of more significance to the local economy than charging itself.

"If I compare Cheshire Oaks to Rhyl, I can see that rather than the charges being the issue it's that in Rhyl you get stuck in traffic and have to drive round. So if you spend ten more minutes in the car, you'll be in Cheshire Oaks and can easily park." Local Authority

4.7.5 Also felt to be particularly important, from a council point of view, is finding a compromise between generating sufficient revenue through car parking charging, and keeping charges at a rate that will not alienate shoppers and drive them out of the town or city centre.

"I'd have liked to have kept the two hours free car parking, personally, I think that helps, that did help immensely. But financial realities just wouldn't let us do that. I think we've come to a good compromise." Local Authority

4.7.6 Some councils also highlighted the need to make changes in a gradual way, to avoid rash changes being made, which are more likely to have more dramatic impacts on the local economy, and may later have to be changed anyway.

"Incremental has worked. We haven't noticed a severe dip in income. I would recommend incremental changes over a number of years." Local Authority

4.7.7 It is also felt to be particularly important to consider the more specific impacts of changes to charging strategies, especially with regard to the types of people using the car parks. For

example, Wrexham County Council's free parking scheme resulted in the 'wrong' type of people (i.e. town centre workers) taking up spaces, which contradicted the council's longer term goal of bringing new visitors into the town.

> *"Free after 12pm had a positive outcome and it would have been really positive for the town centre had it been new visitors and shoppers, whereas it was town centre workers that took advantage." Local Authority*

4.7.8 Several of the Local Authority representatives interviewed also emphasised the importance of engaging with local business' in the town or city centre, since they were felt to know their customers best and therefore are likely to understand effective ways of encouraging them to come into the town centre. This recommendation, reflects the notion that car parking is part of a mix of things that have an impact on the overall health of the local economy – the more that councils can work with other stakeholders invested in the local economy, the more likely they are to have the tools to build a holistic plan that considers car parking from the view of all the parties who need to benefit from it.

> *"Listen to the businesses, because they know what makes the town centre tick. Have a robust offer, nice and simple – cheap, free, whatever you've got to do to get people in, but at the same time you've got to have the retail offer to get them in. It's a mix." Swansea BID*

4.7.9 Several of the local businesses surveyed suggested implementing periods of free parking to encourage shoppers into the town centres; they had noted this strategy working well in other towns/ areas of the town and were confident that free parking is one way of providing an appealing offer to shoppers – particularly considering the need to compete with out of town retailers who offer free parking and good parking availability.

> *"It's vital to encourage people to shop in town centres for the businesses in the centre". Business owner/ worker, Newport*

> *"I would make it free, that's why people go to places like the craft centre. In our town the centre has hills that go up from either side, the car parks are at the bottom so if they offered an hour or half an hour free more people would come." Business owner/ worker, Ruthin*

> *"Lower the parking charges and provide more spaces. It's mainly parking keeping people away." Business owner/ worker, Aberystwyth*

> *"I would offer free parking especially on the weekend and again open the council car park on weekends." Business owner/ worker, Ruthin*

5. Conclusions and recommendations

5.1 Conclusions

5.1.1 The impact of car parking charging on town centre footfall is clearly a contentious topic. Much of the debate is rooted in the fact that car parking charging is a complex issue and one that is part of a mix of factors that affect the impact of car parking more generally, as well as the health of local economies at a more macro level. For example, issues around sustainability, town or city centre offering and location, and government and Local Authority budgets to name a few.

5.1.2 The literature review and primary research indicated that car parking charges are only one of a number of factors at play in influencing footfall and town centre vitality. It showed that organisations with agendas as diverse as the Federation for Small Businesses and Sustrans share the view that an integrated approach to transport policy is needed, and which is tailored to the needs of local economies. One local authority admitted that it would "really, really struggle to provide a compelling case" that reducing charges would have a positive impact on the local economy, despite their chief executive's openness to cheaper parking. In addition, the people surveyed indicated that a number of factors are important as parking costs when making decisions about whether to travel to a town centre or how long to stay there. Overall, this research has indicated that the following parking related factors are important determinants of people's behaviour in relation to town centres.

- Availability of spaces
- Restrictions on parking (i.e. how long people can park for)
- Proximity of parking to intended destination
- Traffic flow
- Signage
- Overall retail offering
- Out of town retail offering
- Out of town parking charges
- Price of car parking
- Security of car park
- Incentives for parking

5.1.3 These factors are subject to ongoing changes, making it difficult to determine the extent to which they are responsible for changes in behaviour. Our survey also indicated that, while people did agree that car parking charges affect their behaviour, convenience is also a critical factor. In addition, the accessibility of spaces, the number of spaces, and the proximity of parking to the town centre were all shown to be as important as cost.

5.1.4 Most of the Local Authorities interviewed as part of this research mentioned that the car parking charging strategies they put in place tended to remain consistent for at least a couple of years, although most of them have implemented trial schemes during that time. However, only one Local Authority has actually used findings from the trial to inform car parking policy. It was also noted that the strategies chosen were influenced by a number of factors, including the requirement for revenue generation, budgetary constraints and business and visitor needs.

5.1.5 Whilst there is not much existing quantitative evidence on the impact that car parking charging has on footfall, it is possible to identify clear examples, at least anecdotally, of where charges have had either a positive or negative impact on footfall and business custom. For example, **whilst a 'blanket' free parking strategy has been suggested to**

encourage more car park users, these were generally found not to benefit target visitors (for example town centre workers who were taking up the spaces all day, rather than shoppers) and consequently had a surprisingly negative impact on footfall. Contrastingly, another Local Authority implemented this type of scheme during their Christmas shopping period and found that footfall, of people coming into the town specifically to shop, increased.

5.1.6 Furthermore, our survey showed that **visitors suggested that car park charging was likely to have an impact on how long they decided to stay in the town centre and, consequently, how much they would spend whilst there**.

5.1.7 So, whilst there is evidence to suggest that car parking charges do have an impact on decisions about whether or not to drive into a town centre and behaviours once in the town centre, **general availability of spaces and the extent to which the car park is likely to be busy are often felt to be more important factors than cost in their overall decision about visiting**.

5.1.8 As the examples above suggest, the impact that similar charging strategies can have in different town or city centres emphasises the point that **charging must be tailored to the demographic and retail/ business offering nuances of the local area, in order to optimise the positive impact that charging has on footfall and the overall health of the local economy. Remaining engaged with the key stakeholders involved in the local economy**, for example business owners, shoppers, council members etc., is also key to ensuring the optimum charging strategies are adopted.

5.2 Recommendations

5.2.1 **Car park charging should not be viewed in isolation from other factors (availability of parking, signage, traffic flow) which affect willingness to drive in town centres**. An overall systemic approach could be taken to future research which examines this complex interplay, rather than one aspect of it. Further quantitative research with visitors, potential visitors and businesses would allow for robust trade-off testing of potential parking packages and these could be modelled to determine the strategies which are most likely to improve footfall.

5.2.2 **Local Authorities should be encouraged to consider the impacts of car parking charges in the broadest possible sense, particularly if their primary goal in changing them is to generate revenue.** They should engage with key stakeholders involved in the local economy when changing their car park charges, for example business owners, shoppers, council members etc. This is key to ensuring the optimum charging strategies are adopted.

5.2.3 **Local Authorities should be encouraged to collect more robust data on the impact of car park charging in their areas**. This will help further planning around car park charging, both at the local and national level.

5.2.4 In developing solutions to encourage greater town centre footfall **the Welsh Government should work closely with Local Authorities and business groups to develop parking strategies** that

- take into account other key decision-making factors (e.g. availability of spaces, parking restrictions, car park security etc.) and
- protect sustainable revenue income for councils

5.2.5 In addition a one size fits all approach to parking strategy is unlikely to work across Wales. The Welsh Government will need to work with Local Authorities to **develop parking strategies that factor in local nuances** around town centre layout and retail offer which differ between locations. For example, in some areas strategies will need to focus more on parking availability or cost, while in other areas it will be more important to focus on promoting the retail offer in town centres vs. the out-of-town offer.

Appendix A: Literature review sources

www.aberdareonline.co.uk
www.bbc.co.uk
www.britishparking.co.uk
www.bstracts.aetransport.org
www.cambrian-news.co.uk
www.carmarthenjournal.co.uk
chrisabruns.blogspot.co.uk
www.dailyrecord.co.uk
www.democracy.anglesey.gov.uk
www.english-heritage.org.uk
www.fsb.org.uk
www.gov.uk
llanblogger.blogspot.co.uk
www.llanellistar.co.uk
www.newsWales.co.uk
online.carmarthenshire.gov.uk
www.senedd.assemblyWales.org
www.southWalesargus.co.uk
www.southWalesguardian.co.uk
www.sustrans.org.uk
towns.org.uk
www.tfl.gov.uk
www.theguardian.com
www.thisismoney.co.uk
www.vale4business.com
www.Walesonline.co.uk
www.whitchurchherald.co.uk
www.workplacelaw.net

Appendix B: Stakeholder interview discussion guide

13030M / WELSH GOVERNMENT ASSESSING IMPACT OF CAR PARKING CHARGES ON TOWN CENTRE FOOTFALL
TELEDEPTH DISCUSSION GUIDE

	Introduction and Warm-up
Setting the scene / ground-rules	Moderator introduces self Explain what the interview is going to entail – talking about local area in general and parking issues, e.g. charges, specifically **No right/ wrong answers** Interview will be audio recorded Anonymity is assured
Respondent introduction	Job title? How long been working in that role? (*PROBE: ESTABLISH HOW ROLE RELATES TO CAR PARKING)*
	Section 2 – Setting the scene; the local area/ economy
	• What would you say are the key things in the area that benefit the economy? Why do you say that? ○ (Moderator also to probe re the strengths of the local economy) • And, what about the things that are making it more difficult to keep the local economy healthy? Again, why do you say that? (If brought up, moderator to steer conversation away from complaints against Welsh Government esp. re business rates) ○ (Moderator to also probe re the weaknesses of the local economy) • Thinking about the town centre in particular, what (if anything) do you see as threatening it? Why do you say that? • And, what about any opportunities? Why do you say that? • How do you think that your car parking strategy is affected by the local economy? • And does it work the other way round? i.e. do you think that the local economy is affected by car parking? • To what extent do you feel car park charging is a hindrance on the local economy and why? • To what extent does car park charging prevent businesses coming to the town centre and why?
	Section 3 – Car parking the local area
	• OVERVIEW OF CAR PARKING STRATEGY – CAPACITY/OWNERSHIP (Local Authority v Private)/Responsibility • Does the LA have a car parking strategy? When was it created? etc. (Moderator to ask whether it's possible for us to be sent a copy of the strategy to help with our research) • What, if any, changes to car parking charges has your council implemented? *(MODERATOR TO PROBE RE EXACT CHANGES THAT WERE MADE. IF NOT MENTIONED PROBE…)*

- Any changes to **pricing structure** (for short vs. long term parking, parking on weekdays and weekends, parking at peak and off-peak times)?
  - **Technologies** (e.g. single-space meters, pay and display, pay on exit, barrier operated etc.)?
  - **Payment systems** (e.g. cash, credit card, remote pay, pre-pay vouchers etc.)?
  - **Enforcement/ fines**?
- Out of town development with free parking – how has this impacted on
  - A) the town centre?
  - B) the car parking strategy?
- Why were these changes made/ was this scheme implemented *(e.g. budgetary pressures, opposition from local community, with a view to increase footfall etc.)*?
  - Were there any constraints on the council's ability to make changes to its car parking strategy (e.g. existing contracts)?
- And how exactly did you implement these schemes? *(PROBE FULLY)*
- Do you know of any other councils who made similar changes? Did this/ would this have helped you make a decision about which schemes to implement?
- Do/ did you have any way of measuring the success of implementing your scheme(s)?
  - What about in relation to footfall in the town centre specifically?
- Do you have any evidence about the impact these schemes have had on the local area?
  - *(MODERATOR TO PROBE AROUND FOOTFALL, TIMES THAT PEOPLE CHOOSE TO VISIT THE TOWN, LENGTH OF VISIT TO TOWN CENTRE, OPINIONS OF LOCAL BUSINESSES ETC)*
  - And what about any impact on specific types of people visiting the town centre (*MODERATOR TO PROBE AROUND THE ELDERLY, YOUNG, SHOPPERS, COMMUTERS, LEISURE USERS)?*
- Do you think that the changes that have been made have been a success?
  - Why/ why not?
  - How do you measure success?
  - Is there anything that would you have done differently, and why?
- Are you aware of any car parking charge schemes that have been particularly successful in other areas of Wales? And what about outside of Wales?
  - Any that have been less successful? (Again, moderator to prove re in and outside of Wales)

Section 4 – Suggestions for improvements/ best practice

	• Considering everything that we've been talking about so far, if you were to advise other councils on car parking charging, what would you say? Why? *(PROBE FOR THE KEY LEARNING)* • Is there anything that you would tell them to avoid doing? Why?
Conclusion	
Additional comments	• Is there anything else that you would like to say to the Welsh Government on the subject of car parking? • Is there anyone else who you think it might be useful for us to talk to on the subject of car parking? This could be people you work with or local business owners etc. (Moderator to collect details: phone number and email address)

Appendix C: In-street survey questionnaire

Project number	13030M
Project name	Assessing impact of car parking charges on town centre footfall
Questionnaire type	PAPI

Screener

S1 Interviewer record location

Single code – TICK ONE ONLY

Code	Text	% response	Instructions
1	Aberystwyth	24%	QUOTA 50
2	Llanelli	27%	QUOTA 50
3	Newport	24%	QUOTA 50
4	Ruthin	25%	QUOTA 50

S2 Can I just check, how did you travel into the town centre today?

Single code – TICK ONE ONLY

Code	Text	% response	Instructions
1	Car (driver)	77%	S3 (QUOTA 35-40 per location)
2	Car (passenger)		CLOSE
3	Taxi		CLOSE
4	Bicycle		CLOSE
5	Motor bike		CLOSE
6	By foot		CLOSE
7	Bus	21%	S4 (QUOTA 10-15 across bus and train, in each location)
8	Train	1%	
9	Other		CLOSE

S3 Where did you park when you drove into the town centre today?

Single code – TICK ONE ONLY

Code	Text	% response	Instructions
1	Free on-street parking	24%	S4
2	Paid for on-street parking	4%	S4
3	In a free public car park	21%	S4

4	In a paid for public car park	51%	S4
5	In a private business/ office car park		CLOSE
6	At a residential property (i.e. someone's house)		CLOSE
7	Other		CLOSE

S4 Interviewer code gender **(Do not read out)**

Single code – TICK ONE ONLY

Code	Text	% response	Instructions
1	Male	43%	GOOD SPREAD
2	Female	57%	

S5 Interviewer code (age)

Single code – TICK ONE ONLY

Code	Text	% response	Instructions
1	16-19	2%	Go to A1
2	20-24	5%	
3	25-34	13%	
4	35-44	18%	
5	45-54	22%	
6	55-64	19%	
7	65 or over	22%	
99	Not willing to say		

Section A – Visiting the town centre

A1 How often do you travel into this town centre?

Single code – TICK ONE ONLY

Code	Text	% response	Instructions
1	Daily	24%	Go to A2
2	Weekly	48%	
3	Less than once a week	7%	
4	Once per month	7%	
5	Less than once per month	10%	
6	First visit	5%	

99	Don't know	0%	

A2 What is the <u>main</u> reason for your visit to the town centre today?

Single code – TICK ONE ONLY

Code	Text	% response	Instructions
1	For work	18%	Go to A3
2	For education		
3	To visit friends or relatives	5%	
4	Personal business or appointment (e.g. doctor, visiting solicitor, passport office etc.)	18%	
5	Family occasion	1%	
6	Leisure	9%	
7	Shopping for food	13%	
8	Non-food shopping	5%	
9	Other	4%	
99	Prefer not to say		

A3 Are there any other reasons that you visit this town centre in general?

Multicode – TICK ALL THAT APPLY

Code	Text	% response	Instructions
1	For work	2%	Go to A4
2	For education	1%	
3	To visit friends or relatives	14%	
4	Personal business or appointment (e.g. doctor, visiting solicitor, passport office etc.)	17%	
5	Family occasion	3%	
6	Leisure day trip or leisure journey	9%	
7	Shopping for food	33%	
8	Non-food shopping	40%	
9	Other	7%	
99	Prefer not to say		

A4 Why did you decide to travel to this town centre for <insert response from A2> today instead of somewhere else?

Can multicode – TICK ALL THAT APPLY

Code	Text	% response	Instructions
1	It's a more convenient location (i.e. it's closer to where I live/ easier for me to travel to)	61%	
2	The selection of shops is better	4%	
3	The parking charges are lower	0%	
4	It's easier to find a parking space	1%	Go to A5
5	I had no other choice / I could only travel to this location	15%	
6	I work in the area	12%	
7	Other (specify)	12%	

A5 Which mode of transport do you use most often to travel into this town centre?

Single code – TICK ONE ONLY

Code	Text	% response	Instructions
1	Own car	80%	
2	Taxi	1%	
3	Bicycle	0%	
4	Motor bike	0%	Go to A6
5	By foot	1%	
6	Bus	16%	
7	Train	1%	
9	Other	0%	

A6 How far did you travel to come into this town centre today?

Single code – TICK ONE ONLY

Code	Text	% response	Instructions
1	Under 1 mile	6%	
2	1-5 miles	46%	
3	6-10 miles	23%	Go to A7
4	11-15 miles	9%	
5	16-20 miles	6%	

6	Over 20 miles	11%	

A7 Roughly how long (in minutes) did it take you to travel to this town centre today?

Single code – TICK ONE ONLY

Code	Text	% response	Instructions
1	Less than 5 minutes	4%	Go to B1
2	5-10 minutes	25%	
3	10-15 minutes	20%	
4	15-20 minutes	18%	
5	20-25 minutes	10%	
6	25-30 minutes	7%	
7	30-45 minutes	10%	
8	45-60 minutes	2%	
9	60-90 minutes	1%	
10	Over 90 minutes	3%	

Section B – Car parking in the town centre

B1 **(ONLY ASK THOSE WHO CODE 7 or 8 AT S2)** Which of the following statements do you think best describes you?

Single code – TICK ONE ONLY

Code	Text	% response	Instructions
1	I travelled into the town centre by bus/ train because it's more convenient than other options, such as driving	64%	Go to B2
2	I travelled into the town centre by bus/ train because it's cheaper than paying for parking	2%	
3	I travelled into the town centre by bus/ train because it's easier than finding/ waiting for a car parking space	0%	
4	Car parking didn't come into my reasons for choosing the bus/ train	19%	
5	Other reason	15%	
99	Don't know	0%	

B2 **(ONLY ASK THOSE WHO CODE 1 AT S2)** On a scale of 1 to 5 (where 1 is not at all important and 5 is very important) how important are each of the following things when considering whether to drive to the town centre and park there?

(Tick in boxes below)

	1 – not at all important	2 – fairly unimportant	3 – neither important nor unimportant	4 – fairly important	5 – very important	Don't know	Instructions
General Availability of spaces	4%	3%	3%	13%	78%	0%	Go to B3
Price of the parking ticket/ meter	6%	5%	10%	19%	61%	0%	
Distance from car park to the town centre	7%	7%	9%	20%	56%	0%	
How busy the car park is/ is likely to be	4%	7%	7%	21%	61%	0%	
Opening times of car parks	14%	8%	21%	14%	43%	0%	
Car parking security	9%	4%	18%	11%	58%	0%	

B3 **(ASK ALL)** On a scale of 1 to 5 (where 1 is highly unlikely and 5 is definitely more likely), how much more or less likely are you to make more journeys to this town centre if there was/ were…

(Tick in boxes below)

	1 – highly unlikely	2 – fairly unlikely	3 – neither more nor less likely	4 – fairly likely	5 – definitely more likely	Don't know	Instructions
More car parking spaces available	8%	3%	31%	19%	39%	0%	Go to B4
Cheaper car parking	8%	6%	35%	12%	40%	0%	
More convenient car park payment systems e.g. text to pay	26%	12%	34%	9%	18%	0%	
Car parking spaces closer to the town centre	10%	7%	27%	21%	35%	0%	
More convenient car park opening times	18%	7%	47%	11%	18%	0%	
Improved quality of car parking facilities e.g. security, lighting etc.	14%	6%	40%	19%	21%	0%	
Additional services e.g. car cleaning	47%	11%	30%	6%	6%	0%	
Reduced time entering and exiting the car park	22%	5%	48%	14%	11%	0%	
Better accessibility of car parking spaces	11%	4%	25%	24%	36%	0%	
Car parking had links with shops, so that you could get money off car parking if you buy something	16%	7%	21%	24%	32%	0%	
Better sized car parking spaces	13%	4%	21%	16%	46%	0%	
More spaces dedicated to particular user e.g. more spaces for disabled people or spaces for people with young children	15%	5%	32%	13%	35%	0%	
Better information about car parking facilities and availability of spaces	13%	6%	34%	14%	32%	0%	

B4 On a scale of 1 to 5 (where 1 is completely disagree and 5 is completely agree), how much do you agree or disagree with the following statement?

(Tick in boxes below)

	1 – completely disagree	2 – disagree	3 – neither agree nor disagree	4 – agree	5 – completely agree	Don't know	Instructions
The free car parking at out of town developments, means that I'm less likely to visit this town centre	23%	16%	10%	16%	34%	0%	Go to C1
The free car parking at out of town developments means that I'm less likely to visit town centres in general	23%	18%	10%	20%	29%	0%	
The cost of car parking influences how long I stay in this town centre	17%	11%	13%	21%	39%	0%	
The cost of car parking influences how much shopping I do in this town centre	20%	14%	13%	20%	33%	0%	
The cost of car parking influences how many leisure activities I participate in in this town centre	23%	12%	15%	17%	34%	0%	

Section C – Demographics

C1 What is your working status?

Single code – TICK ONE ONLY

Code	Text	% response	Instructions
1	Working full time (30+ hours per week)	41%	GOOD SPREAD Go to C2
2	Working part time (up to 29 hours per week)	17%	
3	Full time education	3%	
4	Retired	25%	
5	Looking after the home	9%	
6	Full time carer	0%	
7	In training		
8	Other	4%	
9	Not willing to say		

C2 Which ethnic group do you fall into?

Single code – TICK ONE ONLY

Code	Text	% response	Instructions
1	White British	55%	Go to C3
2	White Welsh	41%	
3	Other white	2%	
4	White & black Caribbean	0%	
5	White & black African		
6	White & Asian		
7	Other mixed		
8	Indian		
9	Pakistani		
10	Bangladeshi		
11	Other Asian		
12	Caribbean		
13	African	0%	
14	Other black	0%	
15	Chinese		
16	Other		
17	Not willing to say		

C3 Do you or does anyone in your party have any of the following conditions or impairments? (Tick all that apply, includes problems due to old age)

Multicode – TICK ALL THAT APPLY

Code	Text	% response	Instructions
1	No conditions or impairments	80%	
2	Mobility	13%	
3	Sight	2%	Go to C4
4	Hearing	1%	
5	Other	4%	
6	Don't know		
7	Refused		

C4 Which of the following best describes your party on this visit?

Single code – TICK ONE ONLY

Code	Text	% response	Instructions
1	Visiting alone	66%	
2	A couple	13%	
3	Family - with young children	10%	
4	Family - with older children	5%	
5	Family - with young and older children	1%	
6	Family - without children	0%	
7	Friends	1%	
8	Organised group / society		
9	Other	1%	

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APPENDIX 3

Regeneration & Environment Scrutiny Committee

Task & Finish Group for the Countywide Review of the Management and Operation of Highway Owned CCBC Car Parks

Terms of Reference

The aim of the task and finish group is to determine if the current strategy and regime for the management and operation of the Council's Highway owned off street car parks is still appropriate and what alternative or additional options should be considered in the future

Proposed Work Programme & Methodology

Meeting 1 (21 July 2016)
Strategic overview current status, parking regime & tariffs

Meeting 2 (September)
Site visits.

Meeting 3 (September)
Workshop session – Operational Challenges

- Enforcement
- Existing provision & charging regime
- Concessions & Restrictions
- Payment Methods

Meeting 4 (October)
Evidence from invited witnesses
Review of analysis
Recommended outcomes and way forward

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