Scrutiny
in Carmarthenshire

Environmental & Public Protection Scrutiny Committee

Task & Finish Review 2015/16
Final Report

Car Parking Charges

Cyngor **Sir Gâr**
Carmarthenshire
County Council

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Chair's Foreword

I am pleased to present the final report of the Task and Finish Group which has been reviewing car parking charges.

It is fair to say that car parking charges is an emotive subject both nationally and here in Carmarthenshire where the topic is regularly discussed by elected members.

This review provided us as group members with an opportunity to consider the issues and evidence in more detail. Of particular importance has been the opportunity to consider the legislation and policies that impact on traffic management and parking, the demand for parking and the purpose of parking charges. Parking also plays an important part in contributing to a number of other transport objectives.

During the review it was clear that the rationale and policies for charging are complex and that contrary to common perception, no parking is completely 'free'. It was therefore important for us as a Group to satisfy ourselves that there was a clear and fair rationale to the Council's parking policy and pricing strategy.

The review also provided us with an opportunity to consider any additional initiatives that might be introduced. One initiative already in place was the 'free parking days' for our towns but the Group was disappointed to note that not all our towns were making use of these opportunities. It is clear that town centre traders and community or town councils themselves need to play their part in making such initiatives work for their respective areas. The opportunities afforded by advances in technology were also considered during the review and these could certainly improve customer experience of our parking services.

It was pleasing to receive representations and suggestions from members of the public during this review and I would like to take this opportunity to thank them for their contributions.

Finally, I would like to thank officers from the Environment and Chief Executive's, Departments for their advice and support, as well as to the members of the task and finish group for their contribution to the review.

Cllr. Peter Cooper
Chair of the Task and Finish Group

1.0 The Task & Finish Review

The Environmental & Public Protection Scrutiny Committee has a key role to play in monitoring services, development of key policies and strategies, as well as identifying areas for improvement or development.

At its meeting on 15th May 2015, the Environmental & Public Protection Scrutiny Committee agreed to establish a task and finish group to research different approaches to car parking charges that could be applied in the county.

Following consideration of a report on Llanelli Car Parks at its meeting on the 28th September 2015, the Executive Board also requested that the Group explore the option of introducing a pay on exit system at the Llanelli multi-storey car park in lieu of the pay and display / pay on foot system.

1.1 Objectives and Scope

Following its first meeting, the Group agreed that its main objective for the review would be to:

- Research different approaches to car parking charges that could be applied in the county.

The Group agreed that the scope of the review would focus on:

- Charging Policy (to include Parking Strategy & Policy)
- Legislation relating to Traffic Management and Parking
- The purpose of parking charges
- Car park demand / usage
- Revenue distribution and impact of reducing charges
- Research evidence on the impact of car park charging
- Main town centre footfall
- Car park charges and competiveness including socio-economic issues

1.2 Approach

The Task and Finish Group's membership was as follows:

- Cllr. Peter Cooper (Chair)
- Cllr. Alun Davies
- Cllr. Ivor Jackson
- Cllr. John Jenkins
- Cllr. Elwyn Williams

The Democratic Services Unit based in the Chief Executive's Department, provided research and general support to the Group.

The following officers provided specialist advice and support during the Group's review:

- Steve Pilliner (Head of Transport & Engineering)
- John McEvoy (Road Safety & Traffic Manager)

A total of 6 meetings were held between September 2015 and April 2016 (see Appendix 5) during which the Group considered evidence and information from a wide variety of sources. The sessions were designed to provide the Group with the relevant information, context and background to the topic.

2.0 Key Findings and Recommendations

2.1 Parking Policy and Charges

The Traffic Management Act 2004 places a legal obligation on local authorities to secure the expeditious movement of traffic. Parking policy and charges have an important role to play in assisting local authorities in securing the safe movement of people and goods within their respective areas. Without both on and off-street parking facilities, traffic would inevitably suffer increasing disruption and lead to chaos in town centres. Parking is also an important policy lever to secure a number of transport objectives.

Parking demand is mainly influenced by the type and function of land use and the quality of a public transport system. The parking policy developed for any particular area depends on the local situation.

In villages and smaller towns and in the outer areas of larger towns, parking policy is often based on providing enough parking spaces (supply) to meet demand (vehicles). In large towns and cities however, the overall transport objectives of reducing accidents and safeguarding accessibility of town centres and the quality of life in and around town centres (air, noise and environmental pollution) are important.

The control of parking supply, charging, enforcement and regulation are the key tools to achieve wider transport objectives. When dealt with properly, a well formulated parking policy (as part of the overall transport policy) is an important economic asset for the local community.

Pricing is relative to demand and supply. Without effective demand management measures such as price and the level of supply in towns, achieving the right balance of social, economic and environmental gains would prove impossible.

The development of parking policy can be aligned to car ownership and traffic growth. Since the 1950s, traffic growth has increased significantly. The UK Government's Department for Transport figures show the overall motor vehicle traffic volume in 2013 was 303.7 billion vehicle miles. This was over 10 times more than the figure for 1949 (28.9 billion vehicle miles). [1] The two charts overleaf illustrate the traffic growth and the parking policy responses to traffic growth.

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[1] Annual Road Traffic Estimates: Great Britain 2013 – UK Department for Transport Statistical Release (June 2014)

Figure 1 (below) illustrates the growth in traffic since mass ownership of the motor car started in the 1950s.

Figure 1: Road traffic in Great Britain, from 1949 [2]

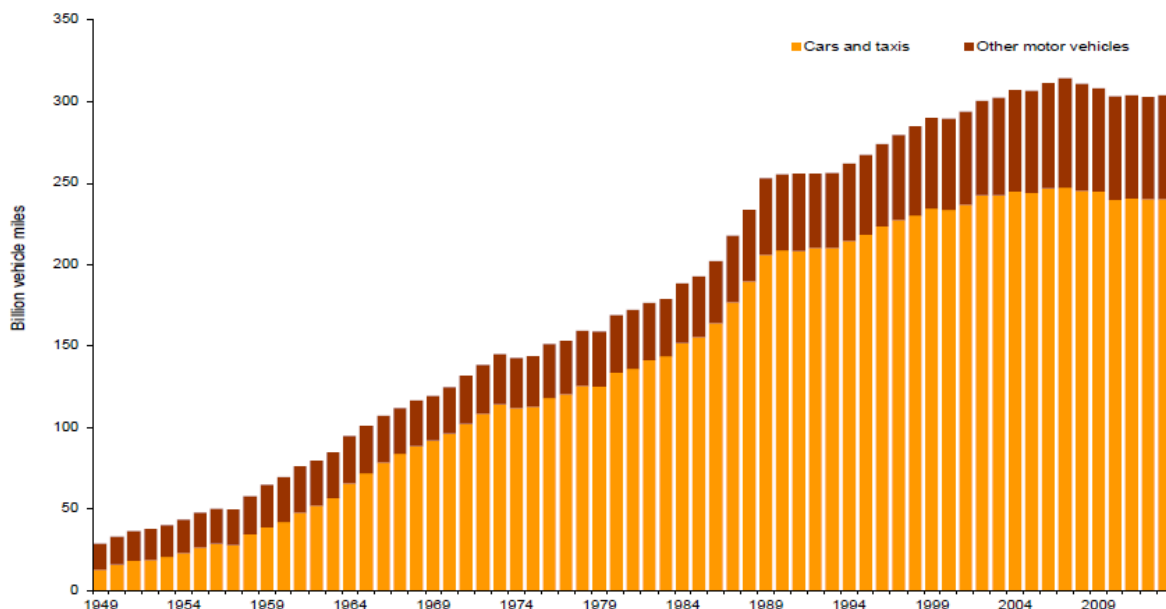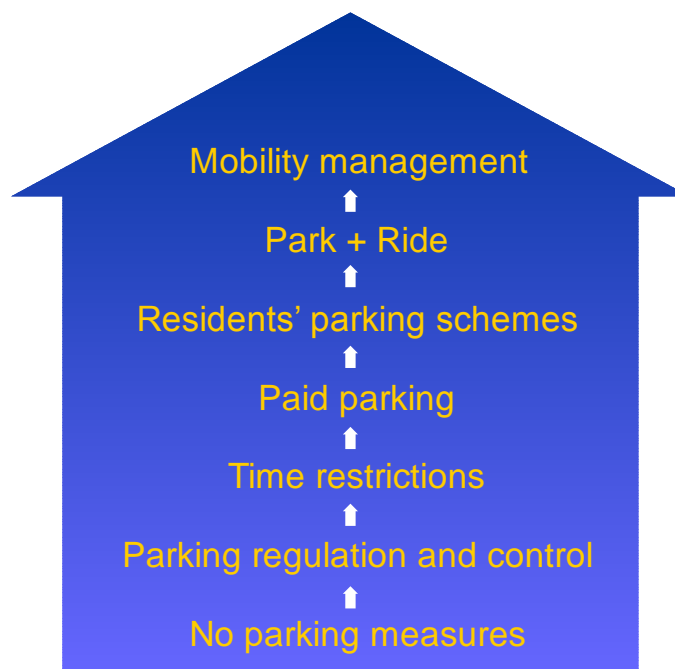Figure 2 illustrates the development of parking policy in light of the growth in traffic volumes.

Figure 2: Parking policy and growth in traffic volumes

Mobility management

Park + Ride

Residents' parking schemes

Paid parking

Time restrictions

Parking regulation and control

No parking measures

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[2] Annual Road Traffic Estimates: Great Britain 2013 – UK Department for Transport Statistical Release (June 2014)

This 'evolution' of parking policy was summarised in an EU Technical Committee on Transport report, entitled 'Parking policies and the effects on economy and mobility'. The report identified the key stages of parking policy:

1) **No parking measures –** No formal action required, available parking space is used until the level of parked cars has a negative impact on the attraction and quality of the area.

2) **Parking regulation and control** – This will be the first step taken. In certain streets, parking will become prohibited and in other locations the parking places will be more clearly marked, creating a more efficient use of available space.

3) **Time restrictions –** With continuing lack of available space the concept of time restriction in parking will be introduced. In this way available space is used more efficiently by increasing the turnover of cars. This measure encourages long-term parkers (mostly commuters) to look for other spaces that are often further from the town centre or to use another mode of transport and visitors and shoppers, to park time-efficiently. In this way, more motorists can be served by the same number of places. Initially, time-control is often carried out by means of a parking disc (in some countries called blue zones) but eventually, the time restriction will be achieved by a parking fee. As parking control becomes tighter, resulting in an overflow of parkers to neighbouring areas which are often residential, residents parking schemes (which require residents to satisfy a set of criteria and pay a permit fee), will often be introduced to alleviate this situation. These schemes allow residents to park in preference to non-residents.

4) **Paid Parking –** As parking demand grows further and the accompanying need for more control, paid parking will be introduced as a means of control. The (differentiated) parking tariffs then becoming the key to control the use of parking spaces.

5) **Park + Ride –** Given the on-going growth in car ownership and use of cars with, simultaneously, the slow down or even reduction in the provision of parking spaces in city-centres and at other important venues or attractions, the concept of the provision of parking places at greater distances will become apparent. The concept of Park and Ride (P+R) was introduced as a means of attracting motorists (initially commuters, eventually also visitors) to park on the outskirts of a town. In most countries this involves the provision of a parking place at the outskirts of a town or in the region at railway or light rail stop. In the United Kingdom Park & Ride sites are usually serviced by a dedicated fleet of high specification buses that operate a fast and frequent service between the P+R site and the town/city centre. This concept is a particularly attractive concept for historic towns where the provision of extra parking spaces could detract from the architectural heritage of the area. This type of service is attractive for commuters and also benefits visitors and shoppers.

6) **Mobility Management –** More recently the concept of 'mobility management' has been introduced in some countries. This concept involves, as related to parking, the combination of private and public transport in order to provide an acceptable mobility-chain for travellers. This is aimed at maintaining and enhancing the accessibility of towns and cities for visitors and not necessarily only for car-traffic. Within this concept, parking is an important element. If car-

users are to use public transport for part of their trip it must be possible for them to park their car easily somewhere on their journey in order to travel onward by public transport, trying to achieve the so-called 'seamless journey'. This development is mainly driven by the following factors:

- Increasing car ownership and car use
- Increasing populations
- Less available space for car parking
- Less available road infrastructure
- Available alternative means of transport. [3]

2.2   Parking Charges and Town Centre Footfall

Contrary to common perception, no parking is 'free'. Whether it is parking at home or in a town centre, there is a price for parking which is reflected in the value and tax for a property at home, or through a fee paid or the opportunity cost of the land in town centres.

The general perception that reducing parking prices can influence footfall in town centres is often made without due consideration being given as to why charges are levied in town centres in the first place. Across the United Kingdom, there are considerable differences of opinion regarding the relationship between car parking provision and town centre prosperity.

For example, in his report 'The Grimsey Review: An alternative future for the high street' Bill Grimsey states that everyone his team spoke to during his review: *"whether it was an independent retailer, shopper or Town Teams stated that 'levelling the playing field' to out of town convenience with regards to parking was essential to give the high street a fighting chance to compete".*[4]

In her 'Independent review into the future of our high streets', published in December 2011, Mary Portas suggests that: *"local areas should implement free controlled parking schemes that work for their town centres."* However, she adds that: *"to offer free parking all day is not the solution"* and recognises that *"this would be potentially open to abuse by local workers."* [5]

In recent years, several studies have been undertaken to examine whether there is any evidence to demonstrate a link. In 2013, the British Parking Association undertook research in conjunction with the Association of Town and City Centre Management. Their research concluded that there was no clear relationship between car parking charges and the amenities on offer in a location. [6]

In 2010, the Transport Research Laboratory (TRL) undertook a review of parking measures and policies. It recognised the importance of parking and pricing policy and confirmed that modern car parking policies strive to use parking facilities efficiently by linking optimal parking supply and price. It also suggested that too

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[3] Parking policies and the effects on economy and mobility by EU Technical Committee on Transport
[4] The Grimsey Review: An alternative future for the high street by Bill Grimsey (September 2013)
[5] Independent review into the future of our high streets by Mary Portas (December 2011)
[6] Re-Think! Parking on the High Street: Guidance on Parking Provision in Town and City Centres by Ojay McDonald, 2013

much supply was as harmful as too little, with prices that were too low being as harmful as those that were too high. The TRL review confirmed that there are two roles of parking:

1. To balance supply and demand.
2. Use parking to meet other policy objectives such as traffic management goals, accessibility for business and shoppers.

The TRL report recognised that there are often conflicting perspectives on parking whilst parking charges represent only a relative small proportion of a journey's cost. It also confirmed that if parking policy is viewed independent of transportation policy and as long as on and off street parking is treated independently, there will be a dysfunction, leading to a degradation of public transport services and infrastructure.

Whilst charging for parking has been traditionally treated as a step function, with prices increasing incrementally at infrequent intervals, parking demand is a continuous function, having experienced steady growth over recent years due to increases in traffic growth. As a result, parking charges tend to lag behind increases in demand so pressure is continuously placed on the highway network. In this way parking pricing policies applied in isolation from other interventions may not be an effective management measure.

Other studies undertaken have also arrived at a similar conclusion, that is, the main motivation for choosing parking location is convenience rather than expense. Research undertaken by the RAC Foundation in 2012, identified that the average annual parking cost is approximately £42 per vehicle registered and £47 per household. By contrast, the amount spent on fuel is approximately £1,600 per annum. A typical family motor car averaging 10,000 miles per annum will cost between 37 and 42 pence per mile travelled to own and run. [7]

There is therefore a need for careful application of policy if the right balance is to be achieved. The right balance will assist with:

- Sustaining a public transport network as much as possible
- Ensuring there is no excess of demand over supply for parking

The Group explored available data on footfall in the County's towns. The available data demonstrated that the general trend in footfall reflected overall sales in parking tickets which continues to see an increase year on year. The Group learnt that the Authority was introducing more data collection devices across the County's towns.

> **Recommendation**
>
> *That the County Council proceeds with on-going collection of data for footfall in key towns.*

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[7] Spaced Out: Perspectives on parking policy by John Bates and David Leibling, RAC Foundation, July 2012

2.3 Car Parking in Carmarthenshire

2.3.1 Carmarthenshire County Council Policy and context

Carmarthenshire County Council's policy on parking and charging is set out in the Integrated Parking Strategy (IPS). The Strategy, published in 2005, reflects wider national and regional transport policy which aims to strike a balance between the economic, environmental and social priorities for a modern day society.

The Strategy acknowledges that parking charges help balance the needs of local communities, individuals who rely on public transport, local economies and business needs with the needs of the environment. It sets the following aims and objectives to help the Authority achieve this:

- To facilitate parking provision and management that maximises the use of existing stock by encouraging churn.
- To ensure that parking facilities are safe, accessible and convenient and that they comply with the Disability Discrimination Act.
- To promote more sustainable travel choices through parking provision and pricing at the same time as maintaining economic viability.
- To be consistent with national and regional parking objectives and with the strategic transport policy in the Council Local Development Plan.

The strategy prioritises actions to achieve the objectives. The actions include the following:

- To prioritise short stay car parking in town centres. This maximises the number of vehicles that can use the space in one day and thus the economic benefit to the local business community. This is supported by long stay car parking on the periphery of towns.
- To encourage Shopmobility in Town Centres to support the Disabled.
- To improve integration with public transport (e.g. facilities near rail and bus stations).
- To provide coach and other parking.

Whilst the Group was concerned that the County Council's Integrated Parking Strategy had not been updated since 2005, it noted that the document was still consistent with the Wales Transport Strategy, the former SWWITCH Regional Transport Plan and now the Local Transport Plan for the Swansea Bay City Region. These important strategies and plans seek to:

- Encourage safer, healthier and more sustainable travel.
- Improve the sustainability of transport by improving the range and quality of, and awareness about transport options including those which improve health and well-being.
- Improve the efficiency, reliability of the movement of people and freight within and beyond south west Wales to support the regional economy.
- Improve integration between polices, service provision and modes of transport in South West Wales.

- Implement measures which make a positive contribution to improving air quality and reducing the adverse impact on health and climate change including reducing carbon emissions.

In working to these objectives, the County Council supports a mix of transport interventions and services within town centres. For example, investment is made into the maintenance and support of highway and parking infrastructure, the public transport system through direct revenue support for services and concessionary fares, bus stations and publicity, cycling and walking facilities and Shopmobility.

The former Regional Transport Plan also confirmed that the local authorities should work collaboratively to adopt a consistent approach to charging relative to economic activity and the availability of public transport or other alternatives in the specific area.

> **Recommendation**
>
> *The Group recommends that the Carmarthenshire Integrated Parking Strategy be updated.*

2.3.2   Car Parks

Carmarthenshire County Council's Parking Services manages both open and multi-storey car parks across the County. There are 54 town / village car parks managed by the Service of which, 25 are pay and display. The Authority operates one multi-storey car park in Llanelli and there are 63 pay and display machines in operation throughout the County. The locations of these car parks and others operated by the County Council's other departments, can be found via the County Council's i-Local site.

These car parks offer a mix of short and long-stay parking bays with the allocation of such bays dependent on the location of the car park and its proximity to a town centre. Not all the Services' car parks are pay and display but the Group concluded that for many of these, it would not be viable to introduce charges due to their size and location. The Group acknowledged that whilst charges might be considered for some larger car parks (e.g. Burry Port, Whitland, Llansteffan), this should not be pursued at this time.

See Appendix 1 for details of the town / village car parks managed by Parking Services.

The Group noted that the mix of short and long-stay bays within car parks managed by the Division did not always match the demand for short-stay parking. One example of this would be John Street Car Park in Carmarthen which is situated closer to the town but has a number of long-stay bays. The Group suggested that the combinations of short and long-stay bays be amended not only to provide better provision of short-stay bays for shoppers but to also encourage footfall through particular parts of the County's towns.

> **Recommendation**
>
> - *That consideration be given to the mix of short / long-stay bays in the Authority's car parks where there is high demand for short-stay parking.*

2.3.3 On-Street Parking

The Group considered a request from a member of the public (see Appendix 3), that all on-street parking bays designated for blue badge holders, were of a length sufficient to accommodate a vehicle adapted to lift a wheelchair. The Group learnt that all on-street bays were currently being surveyed and discussions were now to be held with the Authority's Access Officer in order to consider the options available. The Group also noted that standardising the spaces might reduce the overall number available across the County but agreed that these should be reviewed.

> **Recommendation**
>
> *That the accessibility of on-street parking bays designated for blue badge holders be reviewed and standardised according to the legislative requirements, where feasibly possible.*

2.3.4 Performance

The performance of car parks is analysed to establish trends on usage.

The Group found that the trend in terms of overall ticket sales for car parks was positive both for year on year sales and in-year sales, as outlined in Figure 3 (on next page). The ticket sales for Carmarthen, Llanelli, Ammanford and the Market Towns (e.g. Llandovery, Llandeilo, St. Clears) are included in Appendix 2.

Figure 3: Total Carmarthenshire Car Park Ticket Sales for 2013-2015

Legend:
- Tickets (Num) 2013
- Tickets (Num) 2014
- Tickets (Num) 2015
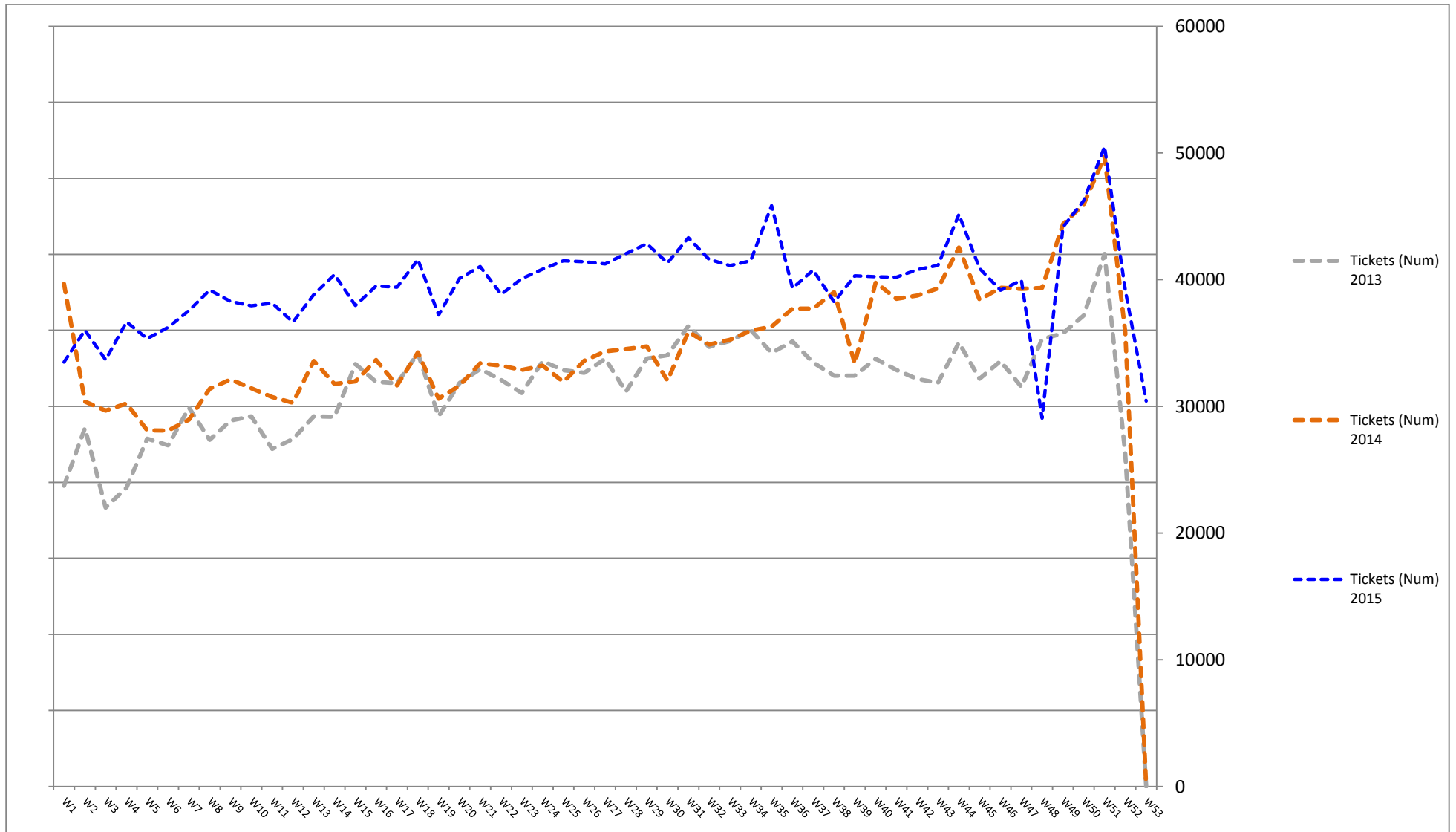
* Changes were introduced in late August 2014 with the introduction of charging for Sundays and Blue Badge holders.

Table 1: Total Carmarthenshire Car Park Ticket Sales for 2013-2015

	2013	2014	2015	Total
Carmarthen	859,046	937,083	1,064,138	2,002,080
Llanelli	285,888	338,713	399,223	1,023,824
Ammanford	251,198	268,902	306,568	826,668
Market Towns	253,127	276,536	303,842	833,505

The Group noted that there were seasonal variations across the years and sales were also influenced by the free car parking days introduced for events in town centres, held outside of the core Christmas trading period.

2.3.5   Charges

The County Council recognises that price is a key demand management tool to encourage turnover of parking spaces, thereby reducing congestion, stimulating traffic flow to improve air quality and road safety. The greater the churn of cars parking, also means the more people are likely to be spending money in town centres. Charges are also set relative to the socio-economic factors of town centres with different charge rates and charge bands for Carmarthen, Llanelli and the rural towns. Details of the current charges (2015/16) for Carmarthenshire County Council's car parks are available online. The car park charges are inclusive of VAT (20%).

Revenue from car parking sustains key highway and transportation-related services for the County Council and any reduction in revenue will therefore have an impact on service provision. For example, public transport support helps sustain over 800,000 passenger journeys per annum, with many of the journeys concluding in town centres. A reduction in revenue for public transport will impact on visitors to the towns and also have a longer term impact on the Social Care and Health system as keeping people mobile helps sustain independence for longer. Many elderly people rely on public transport.

From a Carmarthenshire perspective revenue from car park charges has helped sustain:

- public transport
- major capital investment into the Llanelli Multi-Storey Car Park
- the highway infrastructure
- Shopmobility

The revenue ensures that the Authority is able to support a mix of transportation options for the town centre. This is consistent with the Integrated Parking Strategy's policy objectives set out above and good practice identified in the research.

A comparison of car park charges across similar towns in South and West Wales is set out in Table 2 (on next page).

Table 2: Comparison with other local authority areas*

Town	1 hour charge	2 hour charge	3 hour charge	4 hour charge
Abergavenny	1.00	1.00	1.50	2.00
Bridgend	0.70	1.50	3.00	6.00
Brecon	1.00	1.50	2.50	3.20
Cardigan	1.20	1.50	2.20	Max Stay 3 Hours
Machynlleth	1.00	1.50	2.50	3.20
Neath	1.30	1.80	2.30	2.80
Port Talbot	1.30	1.80	2.30	2.80
Aberystwyth	1.30	1.80	2.50	3.50
Ammanford	0.70	1.00	1.00	1.00
Carmarthen	1.60	2.20	3.40	3.40
Llanelli	1.20	1.60	1.80	2.00
Llandeilo	0.70	1.00	1.00	1.00
Llandovery	0.70	1.00	1.00	1.00
Newcastle Emlyn	0.70	1.00	1.00	1.00
St Clears	0.70	1.00	1.00	1.00
Cardiff	2.00 3.10 2.00	3.40 3.10 3.00	5.20 3.60 4.00	5.20 4.10 5.00
Swansea	1.20 1.40	2.40 2.80	3.50 4.00	4.70 5.50

* These charges were correct when considered by the Group at its meeting in November 2015

The Group concluded that there was a clear rationale for the Council's parking policy and pricing strategy and that Carmarthenshire's current charges were extremely competitive when compared with towns of a similar demographic and function. It also noted that from the performance data and research considered, it was evident that it was the attraction of the offer in town centres which influenced demand.

Given the competitive nature of Carmarthenshire's current charges and being mindful of representations it had received, the Group agreed that these charges be retained but that footfall in towns be kept under regular review and consultation be undertaken on future changes to charges.

> **Recommendation**
>
> *Given the competitive nature of Carmarthenshire's current charges, the current pricing strategy be retained but that footfall in towns be kept under regular review and consultation be undertaken where future changes to parking charges are proposed.*

2.3.6   Investment in the service and infrastructure

Llanelli Multi-Storey Car Park – The Authority continues to invest in the service and its parking infrastructure. In 2012, work was carried out to completely refurbish the Murray Street Multi-Storey Car Park in Llanelli. This 40 year old of structure was in need of an overhaul to extend its service life for another 25 years.

The work also gave a lighter and safer environment to users of the car park. The life care plan indicated that strengthening works were required to the pre-cast parapets and concrete decking. Refurbishment works included:

- Concrete slab and column repair
- Deck wearing surfaces
- Vehicle edge restraints
- New eye mesh cladding
- New lifts and lift machinery
- New energy efficient lighting scheme
- Works to three stair wells
- New customer foyer
- New CCTV surveillance
- New active and passive signage.

The overall contract value was £1,845,525 and was funded by Carmarthenshire County Council's capital projects budget. The project attained the Safer Parking Award in May 2013.

Use of technology – Networking technology has been installed for all 63 pay-and-display ticket machines. The network:

- Connects each parking machine with Parking Services' back office.

- Provides two way communication between the parking machine and the back office enabling the tariff information to be adjusted and monitoring of the status of the machines.

- Enables the data transferred between the parking machine and the back office to be used to produce very accurate and comprehensive reports related to ticket sales.

The Authority has also replaced the Civil Enforcement Officers' hand-held computers with smart phones which are far smaller than the larger hand-held computers. The smart phones offer the same functionality as the old hand-helds and were purchased at a quarter of the cost. In addition, the smart phones provide mobile communication and download functionality, as well as a camera.

2.3.7   Existing initiatives

Park + Ride – The Carmarthen Park and Ride service runs every 30 minutes from 7:00am to 7:00pm, Mondays to Saturdays and is provided by Carmarthenshire County Council in conjunction with Hywel Dda University Health Board.

The service starts at Nant-y-Ci Car Park and stops at Carmarthen Bus Station, the main stopping point in the town centre, before moving on to Spilman Street. In March 2015, the service was extended to West Wales General Hospital at Glangwili before returning to Nant-y-Ci.

For those commencing their journey at Nant-y-Ci, parking is free but there is a charge of £1 for a day return ticket, with free travel for children under-16, if accompanied by an adult buying or using a £1 ticket. All Wales Concessionary Travel Pass holders can travel for free from and to Nant-y-Ci.

Free Parking Days – In 2013, the County Council introduced a introduced an initiative which provided discretionary free car parking for town centres to a maximum of five days per financial year. These free parking events are subject to the following conditions:

- The event days must support the whole of a town and are not specific to one or a select group of retailers.

- Events must be organised through a town centre management group where the Council is represented or a similar organisation.

- The total number of event days must not exceed five in any one year.

- Event days should, where possible, be agreed a minimum of one month in advance or earlier.

- The year will operate from 1st April to 31st March.

- Event days held during the busiest trading periods (i.e. from 1st December to 31st December each year) will not qualify for the free parking support.

- Event organisers will be encouraged to advertise in 'Carmarthenshire News' with the advert paid for by the organisers.

- Whilst the discretion will only apply to Council operated car parks, the event organisers must demonstrate evidence that any private sector car park operator in a town has been approached to match the Council Offer.

- The Council's support is acknowledged in all marketing literature, adverts and publicity for events.

However, the Group found that in previous years, not all towns within the County had taken up their full quota of free days available to them. Table 3 (on next page) lists the number of free parking days held across the county since 2013.

Table 3: Use of Free Parking Days by the county's towns

Town	Year		
	2013/14	2014/15	2015/16
Ammanford	3	5	5
Carmarthen	-	-	5
Llandeilo	2	3	3
Llandovery	-	3	4
Llanelli	3	3	5
Newcastle Emlyn	-	-	5
St. Clears	-	1.5	1

The Group therefore suggested that Town/Community Councils and Chambers of Trade be reminded of this initiative and encouraged to make use of the opportunities it provided.

Recommendation

That Town / Community Councils and Chambers of Trade be reminded of the free-parking day scheme and be encouraged to fully utilise this initiative.

Llanelli Free-Parking Pilot – During October 2015, the Local Authority piloted a free-parking initiative in Llanelli. At its meeting held on 15th April 2015, the County Council considered a motion requesting a 6 month trial of 2 hour free parking in Council car parks in Llanelli Town Centre. The County Council resolved that the motion be supported and the proposal be referred to the Executive Board for consideration.

The Executive Board, at its meeting on the 28th September 2015, agreed that that a two hour period of free car parking be introduced between 3:00pm and 5:00pm each day for a period of one month in October to enable further analysis of off-street parking demand to measure the impact of free parking.

All pay and display machines in the Llanelli town centre car parks have modems installed so that accurate and detailed information about ticket issue can be downloaded remotely and allowed a detailed assessment of ticket issue to be undertaken. The town centre car parks subject to the free parking initiative during October 2015 were:

- Church Street
- Eastgate
- Edgar Street
- Murray Street Multi-Storey
- Vauxhall

The records of tickets issued in 2014 and 2015 were compared to establish what changes had occurred. In addition, public perception surveys were undertaken on

street and on-line. During October 2015 motorists were required to acquire a ticket from the parking machine (at no cost) to display on their vehicle between the allocated hours of 3:00pm and 5:00pm.

Following the pilot, the Group found:

- The increase in tickets issued during the free parking trial period in October 2015 was in-line with the increased ticket sales figures for the period September to December 2015. Comparison in the trends in tickets issued in 2014 compared with 2015 can only be made for the four month period September to December in each calendar year. Ticket sales data up to September 2014 cannot be used for the purpose of analysing current trends in car park usage given that Sunday charging and charging blue badge users to park came into force on the 28th August 2014.

- The evidence confirmed that the increase in sales during the trial period was in line with the previous month's trend. There were also exceptional events and weather (e.g. new Bond film 'Spectre', the Rugby World Cup and unseasonably moderate weather taking place at the time).

- The figures in the detailed analysis and the distribution of sales by hour, suggested that there was evidence of displacement as tickets sales were down on the time bands before 3:00pm which will partly explain the increase in sales later in the day.

- There was a significant increase in tickets sales for the period 5:00pm to 6:00pm during October 2015 when compared with October 2014.

- The results of a car parking perception survey conducted during the October 2015 half-term shows a relatively positive view of car parking facilities in Llanelli in terms of access, security and cleanliness. Almost half of those questioned found parking charges to be expensive. That said, a mere 7% were aware that income derived from parking charges were used to support the provision of transport services.

- According to the results of the perception survey only 11% of those asked had taken advantage of the free car parking available in Llanelli Town centre during October (between 3:00pm – 5:00pm).

During discussions on parking in Llanelli, the Group also learnt that the Authority's staff car park off Coleshill Terrace was already free to members of the public at weekends. However, the Group felt that this was not advertised sufficiently and suggested that this provision be promoted more widely.

Recommendation

That the free parking at the Council's Coleshill Car Park (Llanelli) at weekends be further promoted.

2.4   Alternative Parking Approaches / Options

2.4.1   <u>Increasing the number of free parking days</u>

The Group suggested that the number of free days available for towns to use during the year be increased to seven. However, it noted that the traditional Christmas shopping period now began in November and so it was suggested that the core period be extended into November should an additional day be offered at a different time of the year. The Group was advised that this would have a financial impact of approximately £14,000. This was based on the average daily income for each of the towns in the 2015 calendar year.

> **Recommendation**
>
> *That the number of free parking days available to the County's towns be increased to 7 days per year but that the exclusion period be extended to cover the whole of November, as well as the whole of December.*

2.4.2   <u>Simplified charging bands</u>

Carmarthen Town Forum suggested (see Appendix 3) that the charging bands be simplified so that motorists be charged £1 an hour for the first 3 hours and given a free 4th hour. The Group was advised that standardising bands would push up some ticket prices and because of the hike in some tickets, experience had shown that it was likely that there would be a 'displacement' in the demand from 2 hour tickets to 1 hour tickets, which in turn would impact on the amount of time shoppers stayed in the town centre. The Group was also advised that changing bands would risk a backlash from the public and that due to inflation, ticket prices could not be kept at £1, £2, £3 pounds indefinitely. Any gain would be short lived. If this was proposed, it would require, as a minimum, detailed surveys of the public to be undertaken first.

2.4.3   <u>Reintroduction of free parking on Sunday</u>

This suggestion was made by Carmarthen Town Forum (see Appendix 3) who claimed that the measure had proved deeply unpopular for several reasons. The Group was advised that reintroducing free parking on Sundays would result in a financial impact of £132,259 for the Authority. This would mean increasing charges elsewhere or cutting services. The Group also noted that there were charging exemptions already in place on Sundays, introduced as a result of consultation relating to an Off-Street Parking Places Consolidation Order in 2014 (see Appendix 4 for more details).

2.4.4   <u>Free parking after 3:00pm on 'quiet' days (i.e. Tuesdays and Thursdays)</u>

This proposal by the Carmarthen Town Forum (see Appendix 3) suggested that such an initiative would need to be supported by a campaign to encourage

shoppers into towns on those days and times. The Group received information that such an initiative would shift demand to the free parking period, and result in a drop in income and lead to reductions in other highway related services. The Group noted that this shift had been experienced during the Llanelli pilot and such an initiative was unlikely to increase demand and would rather shift it to another time period.

2.4.5 Pay on Exit Schemes

The Group considered the Executive Board's request (at its meeting on the 28th September 2015) [8], that it explore the option of introducing a 'pay on exit' system at the Llanelli multi-storey car park in lieu of the pay and display / pay on foot system.

'Pay on exit' systems allow drivers to park for an indefinite period of time and pay when they leave the car parking facilities. A ticket is dispensed when a driver enters the car park which is then used to determine the charge upon on leaving. This system is commonly found in larger and enclosed facilities such as multi-storey car parks.

The Group found that initial investigative work had indicated that to install a pay on exit system at Llanelli Multi-Storey Car Park, would require an up-front capital investment of £61,000. This would cover the installation of meters and barriers as well as cover the first year's running costs. The Group noted that this was only likely to work in the County's enclosed car parks (with one entrance and exit) such as the Llanelli Multi-Storey and Friar's Park in Carmarthen and not in other car parks which had multiple entrances and exits. The Group suggested that whilst it would be possible to install such systems, the cost to the Authority would be significant.

Following further investigative work, the Group found that a new variation of the system was now in use. This new ANPR (Automatic Number Plate Recognition) system works by taking an image of the vehicle on entry to the car park. Following their visit, the user enters their vehicle registration and is presented with an image on a screen that match the details entered. The driver then selects and confirms their vehicle and pay for the amount of time they have stayed. The Group noted that the system would:

- Eliminate the need for the pay-and-display system of managing the use of town centre car parks.

- Allow drivers to pay on return rather than try to estimate how long they will be at appointments.

- Not require a barrier to control entry or exit from the car park.

However, the Group learnt that Welsh local authorities could not use ANPR cameras in their off-street car parks. The reasons for this were complex and varied, but rested on the following legal constraints:

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[8] Llanelli Car Parks – Carmarthenshire County Council Executive Board Meeting, 28th September 2015

- Local authorities do not currently have the powers to use CCTV / ANPR in public car parks.

- All parking Penalty Charge Notices must be delivered by hand as the Civil Enforcement Officer must check the validity of a penalty charge notice and may also potentially become a witness in any subsequent adjudication action.

- The Welsh Government has not at this time given approval for the use of camera enforcement devices for use in off-street car parks.

- Statutory guidance produced by the Welsh Government recommends that approved camera devices are used only where enforcement is difficult or sensitive and Civil Enforcement Officer enforcement is not practical.

The Group noted that officers were currently pursuing the matter with both the Welsh Government and PATROL.

> **Recommendation**
>
> *That the Council pursues the potential change in legislation with the Welsh Government and subject to clarification and affordability, proceeds with a phased programme of introducing an ANPR Pay on Exit system across its car parks.*

2.4.6 Shop and Drop Initiatives

Carmarthen Town Forum suggested that this would assist the increasing number of high-street shops who operate an on-line 'click and collect' service in order to compete with internet shopping companies.

The Group considered 'shop and drop' initiatives, particularly given anecdotal evidence that there was no provision for those wishing to simply stop for a few minutes in order to 'buy a newspaper' early on a Saturday or Sunday morning. Reference was made to the BID Scheme for Llanelli which had been supported by traders in Llanelli. One of the initiative's pledges is to: *"create a more accessible town centre with more affordable parking on and off-street"*. [9]

> **Recommendation**
>
> *Where feasible, the Council introduces 'shop and drop' bays in the county's towns, in proportion to the size of the town and spaces available, for a limited waiting time of up to 30 minutes.*

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[9] Llanelli Businesses vote for BID (11th December 2015)

2.4.7 <u>Pay by Phone / Cashless Payment System</u>

The Group learnt that the Authority had been exploring the introduction of a cashless parking service in its key towns, through the use of 'pay by phone' technology. The system would enable drivers to pay a service provider via a mobile phone or smart phone / PC using a payment card. The system requires a driver to confirm the following details either online or over the phone:

- Number plate, the colour and make of vehicle
- Car park location parked
- How long they want to stay
- Payment card details

The vehicle details and duration of stay would then be relayed to the Civil Enforcement Officers' smartphones so that it can be verified that the vehicle in question has paid for parking. The Group noted that the uptake of this technology would be cost-neutral to the Authority.

Recommendation

That the Council proceeds with introducing 'cashless payment' technology by undertaking a pilot in the County's key towns.

3.0 Conclusion

Whilst there is a perception that parking pricing spoils economic activity by discouraging customers, there is evidence that fair parking pricing provides economic benefits as it increases turnover of parking spaces. It makes finding a space easier, reduces the number of parking spaces required at a location, which can provide longer term financial benefits and reduce traffic problems such as congestion and air quality. General levels of provision may also affect modes of travel, in turn impacting on the quality of the shopping environment.

The Group suggests that:

- Contrary to common perception, no parking is 'free'. Whether it is parking at home or in a town centre, there is a price for parking which is reflected in the value and tax for a property at home, or through a fee paid or the opportunity cost of the land in town centres.

- There is a clear rationale to the Council's parking policy and pricing strategies which is supported by a body of research undertaken at national and international level.

- The performance data and research indicates that ticket sales are increasing and it is the attraction of the offer in town centres which influences demand for parking.

- There are initiatives that could be introduced to develop the parking service further and improve the customer's experience, although systems such as ANPR would require investment beforehand.

- The free parking scheme for the County's towns is popular although not all towns are utilising the opportunity as much as others. More needs to be done to promote this initiative and to encourage towns themselves to make better use of the opportunity.

- A parking strategy is key although this clearly needs updating in order to give future direction to the service.

4.0 **Appendices**

4.1 Appendix 1 – Town / village car parks in Carmarthenshire managed by Carmarthenshire County Council's Parking Services

4.2 Appendix 2 – Parking trend graphs

4.3 Appendix 3 – Submissions by members of the public

4.4 Appendix 4 – Charging exemptions on Sundays

4.5 Appendix 5 – Task & Finish Group meetings and attendance

4.6 Appendix 6 – Bibliography / References

4.7 Appendix 7 – Glossary of Terms

4.1   Appendix 1 – Town / village car parks in Carmarthenshire managed by Carmarthenshire County Council's Parking Services

Town / Village	Car Park	Type	No. of Bays	Park Mark Award	CCTV
Ammanford	Baltic	Pay & Display	51		
	Carregaman	Pay & Display	161		
	Iscennen Road	Free	18		
	Lloyd Street	Pay & Display	27		
	Margaret Street	Pay & Display	246	✓	✓
	Wind Street	Pay & Display	45		
Brynaman	Hall Street	Free	Unmarked		
Burry Port	Seaview Terrace	Free	30		
	Seaview Terrace Interchange	Free	200		
	Tramway	Free	Unmarked		
	Neptune Terrace (Train Station)	Free	Unmarked		
Carmarthen	Blue Street	Pay & Display	39		
	County Hall	Pay & Display (Weekends only)	124		
	Friars Park	Pay & Display	374	✓	✓
	John Street	Pay & Display	464		
	Lammas Street	Pay & Display	27		
	Nant-y-Ci Park + Ride	Park + Ride	300 (approx..)		
	Parc Myrddin	Pay & Display (Saturday only)	115		
	Priory Street	Pay & Display	56		
	Quayside	Pay & Display	14		
	3 Spilman Street	Pay & Display (Weekends only)	80		
	Station Approach Bus Park	Pay & Display	16		
	Station Approach	Pay & Display	33		
	St. Peter's Car Park	Pay & Display	458		
Cross Hands	Llandeilo Road	Free	20		

Town / Village	Car Park	Type	No. of Bays	Park Mark Award	CCTV
Ferryside	Eva Terrace	Free	30		
Garnant	Bowls Pavilion	Free	75		
Glanaman	Cwmaman Road	Free	36		
Kidwelly	Glan-yr-Afon	Free	18		
	Station Road	Free	32		
Llandeilo	Carmarthen Road	Free	15		
	Crescent Road	Pay & Display	190		
Llandovery	Llandovery Castle	Pay & Display	166		
	Station Car Park	Free	24		
Llanelli	Church Street	Pay & Display	83		
	Coleshill Terrace	Free (Weekends only)	Unmarked		
	Dafen	Free	40		
	Eastgate	Pay & Display	214	✓	✓
	Edgar Street	Pay & Display	89		
	Great Western Crescent	Free	32		
	Mincing Lane	Disabled only	6		
	Murray Street Multi-Storey	Pay & Display	512	✓	✓
	Pottery Street	Free	Unmarked		
	Station Road	Free	17		
	Vauxhall	Pay & Display	23		
Llansteffan	The Green	Free	100		
Llanybydder	Station Terrace	Free (charges on Market Days)	206		

Town / Village	Car Park	Type	No. of Bays	Park Mark Award	CCTV
Newcastle Emlyn	Castle Street	Pay & Display	27		
	Cawdor	Pay & Display	67		
	Mart	Pay & Display	122		
Pendine	Marsh Road	Pay & Display (Summer only)			
St. Clears	Pentre Road	Pay & Display	179		
Tumble	Heol-y-Neuadd	Free	44		
Whitland	King Edward Street	Free	Unmarked		
	North Road	Free	40		
Ystradowen	Pen-y-Craig Road	Free	13		

4.2   Appendix 2 – Parking trend graphs

Carmarthen Car Park Ticket Sales 2013-2015
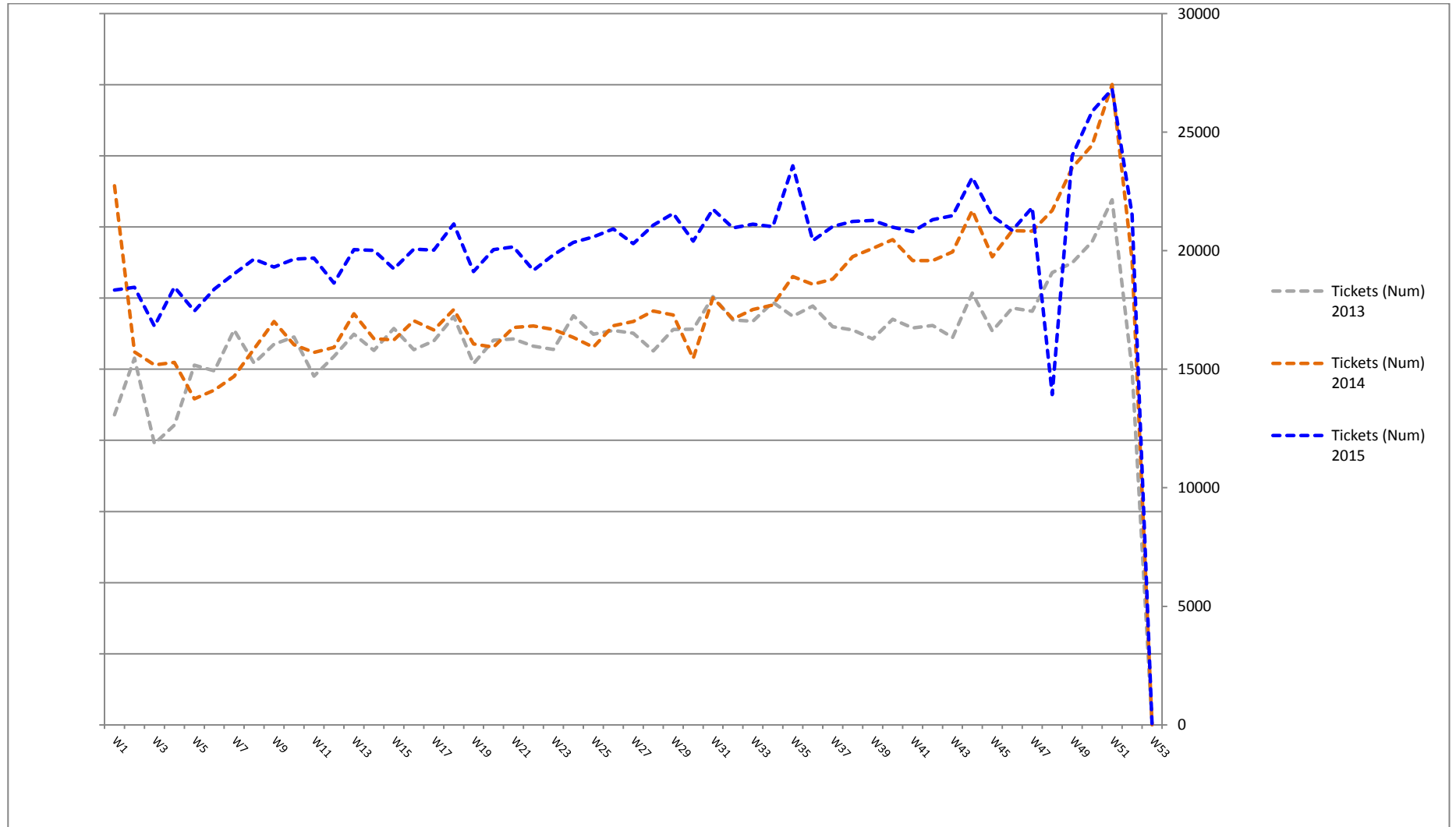
Llanelli Car Park Ticket Sales 2013-2015

Legend:
- Tickets (Num) 2013
- Tickets (Num) 2014
- Tickets (Num) 2015
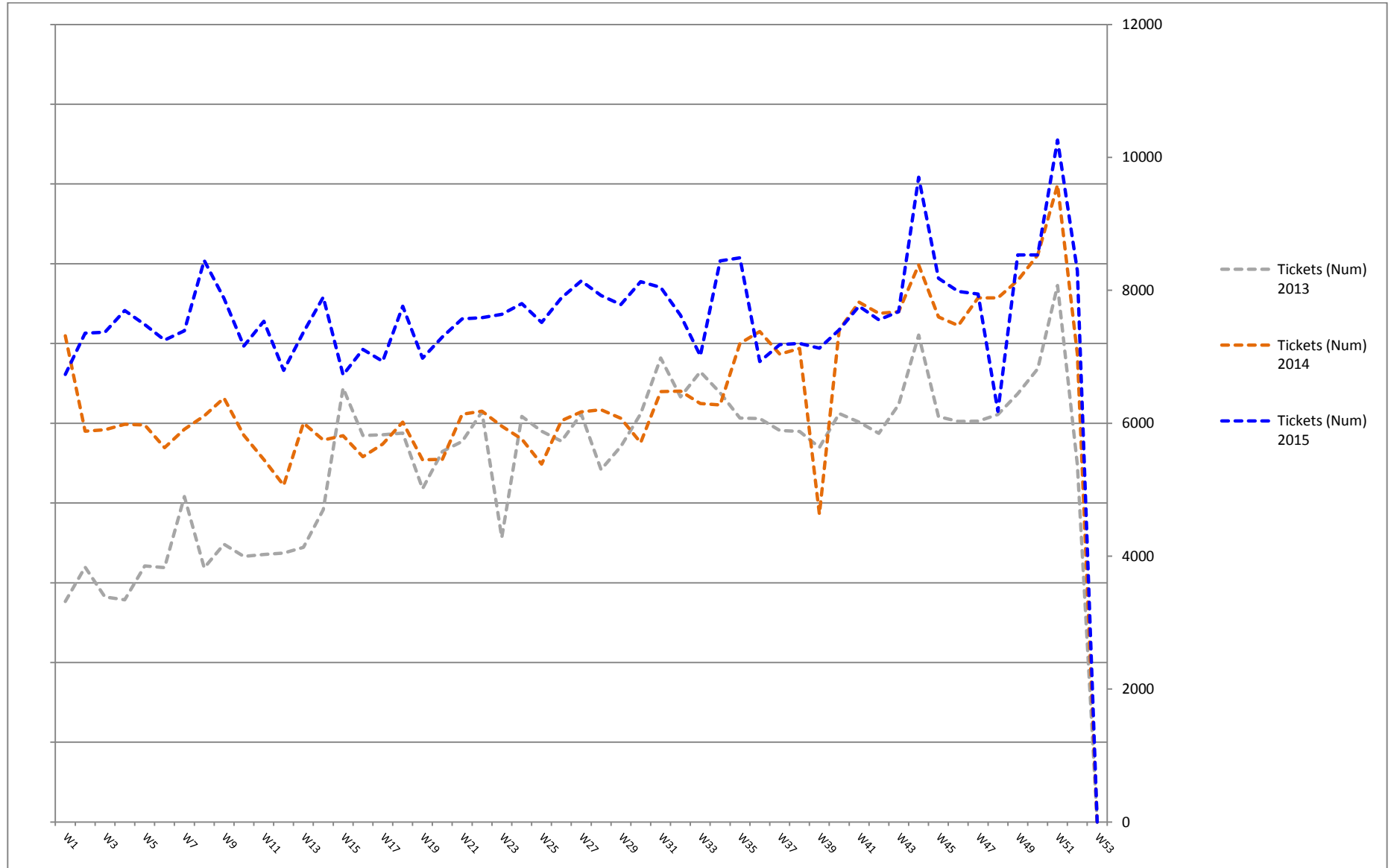
Ammanford Car Park Ticket Sales 2013-2015
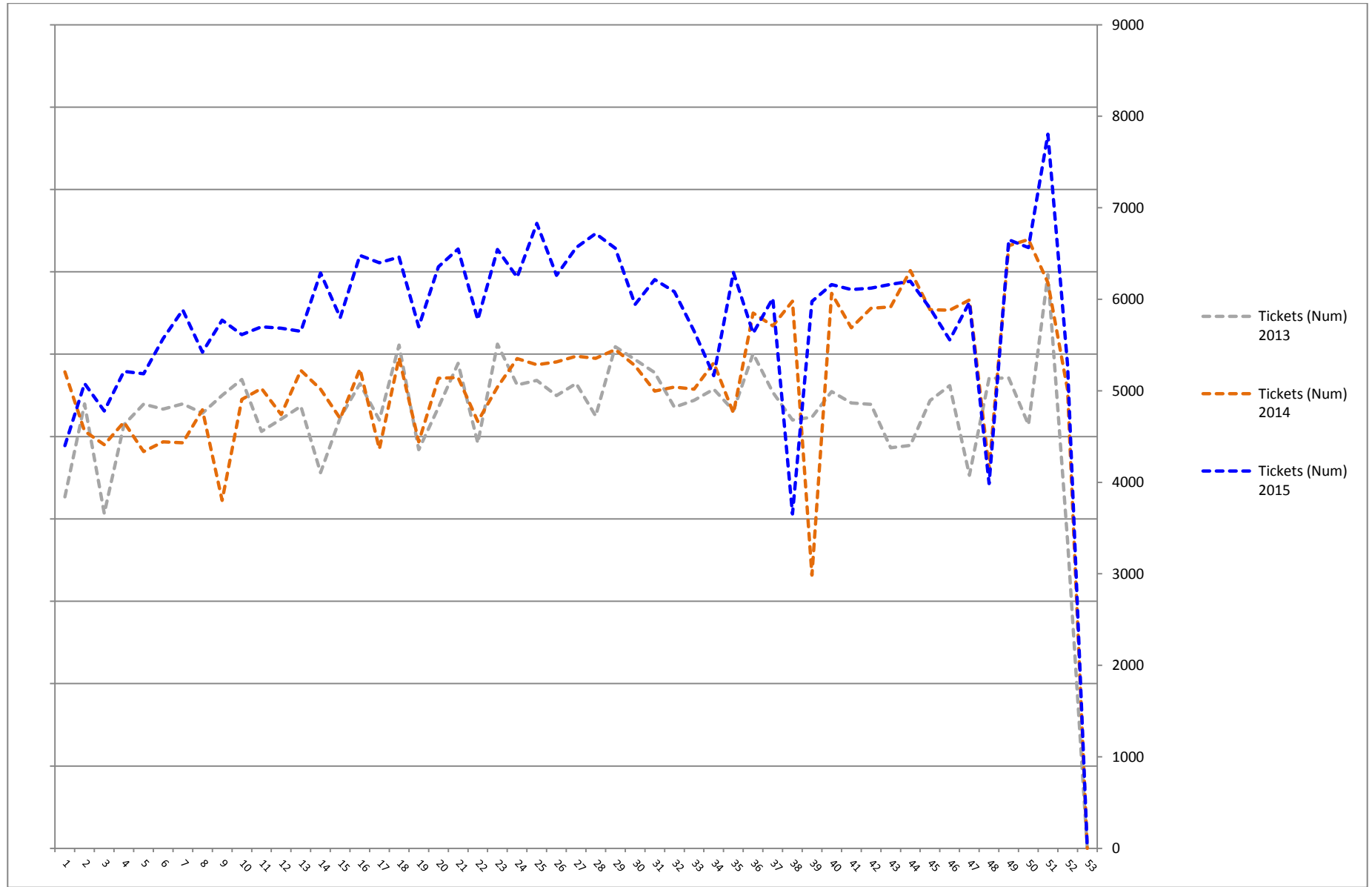
Market Towns Car Park Ticket Sales 2013-2015

Legend:
- Tickets (Num) 2013
- Tickets (Num) 2014
- Tickets (Num) 2015
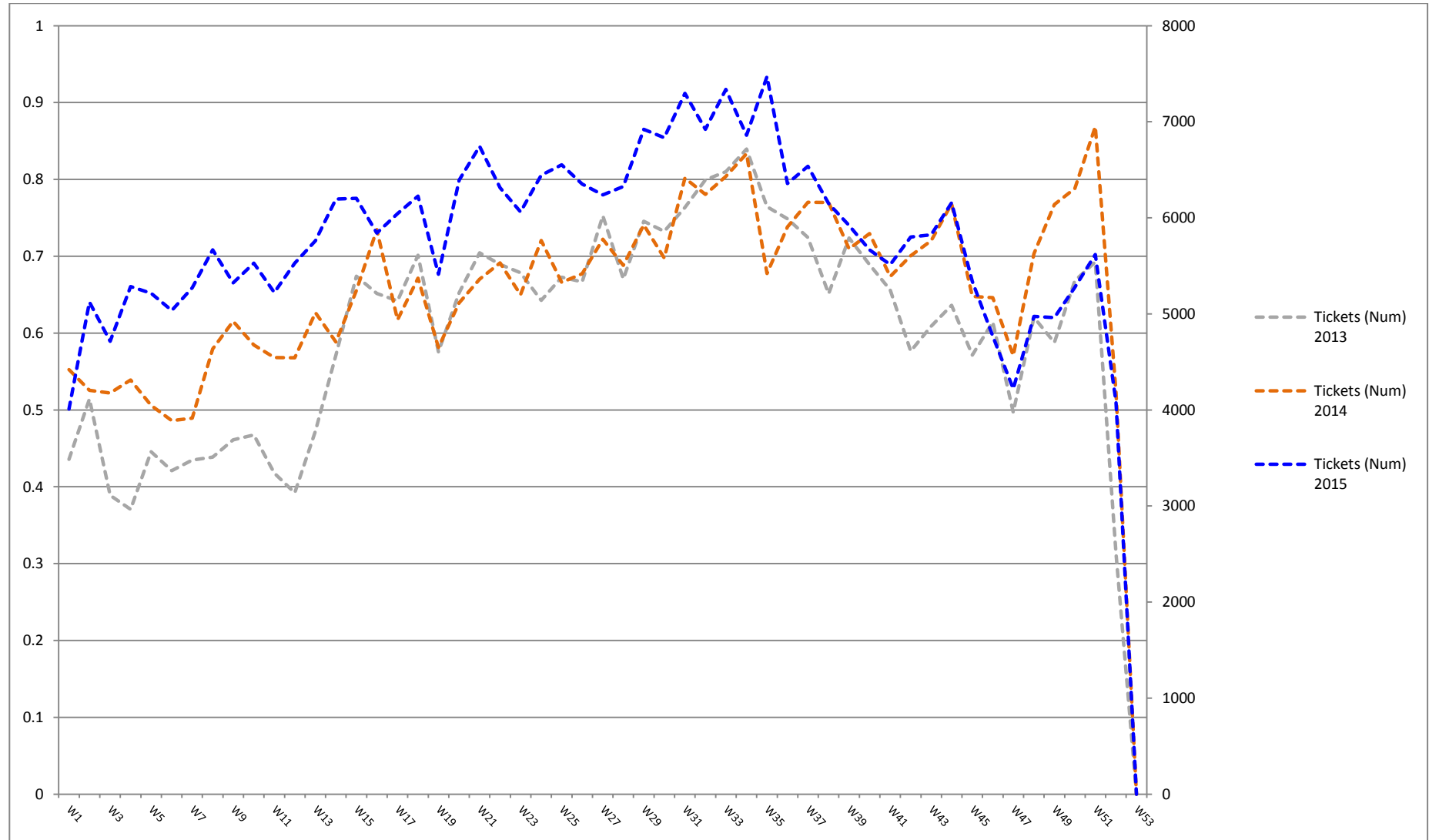
4.3   Appendix 3 – Submissions by members of the public

Cllr. Alun Lenny on behalf of the Carmarthen Town Forum

While it is very gratifying indeed that Carmarthen town now has the 4th highest footfall of any shopping centre in Wales, its success is driven by the more recent developments around M&S and St Catherine's Walk. Constant efforts are needed to encourage shoppers to visit the older parts of town and frequent the independent shops in those streets.

To this end, the County Council set up the Carmarthen Town Forum in 2013. Key issues were identified and strategies suggested as part of a 15-year Masterplan. Footfall pattern and parking are central parts of the Masterplan.

The suggestions below are based on recent county council data during a short free parking period and reflect the views and experiences of town councillors and traders in Carmarthen. The conclusions could apply county-wide.

We would welcome:

1. Free parking for the first 30 minutes. This would be a big help for the increasing number of high-street shops who operate an on-line 'click and collect' service, in order to compete with internet shopping companies.

2. Simplified charge bands. £1 an hour for the first 3 hours, and a free 4th hour. This might not necessarily mean a drop in income.

3. Reintroduce free parking on Sunday. This measure has proved deeply unpopular for several reasons – one being that traffic wardens are very active on a day when a more relaxed attitude towards parking was traditionally taken e.g. someone might stop on yellow lines to pop into a shop to buy a Sunday paper, pause for a quick chat, and come out to find a warden issuing a ticket. Extra wardens are employed on Sunday since the charges came in. This cost could be offset against the drop in income from parking charges if Sunday charges were scrapped.

    The same drop in income might be offset against spending on regeneration and promotion, as there's firm evidence that free parking would boost trade in towns on Sunday. There was free parking for three days in Carmarthen over the 'Black Friday' weekend (Nov. 27-29) in an effort to compete with heavy shopping on the internet and out-of-town stores. Evidence indicates that the initiative was a success.

    A 'people counter' installed by the County Council in King Street recorded an increase of 15.1% in footfall on the Sunday of that weekend. Traders testify to a marked increase in business – not just in shops, but in restaurants and hotels providing Sunday lunches. This e-mail by John Nash, manager of St Catherine's Walk, is well worth noting: *"Performance was up 237% Month-on-Month and 47% up Year-on-Year, and I am certain that the Black Friday free parking contributed to these great figures. We must make sure that we publicise heavily any free parking in the future as it the whole issue of parking features heavily in the shoppers mind when choosing where to shop."*

4. Free parking after 3pm on 'quiet' days i.e. Tuesdays and Thursdays, coupled with a campaign to encourage shoppers to come into town on those days and times.

Representation received from the Office of Rebecca Evans AM (for Mid & West Wales)

The Transport & Engineering Division received representations from a county resident via the office of Rebecca Evans AM (for Mid & West Wales), regarding the suitability of on-road parking spaces for wheelchair users. It was requested that all on-street disabled persons parking bays were of a length sufficient to accommodate a vehicle adapted to lift wheelchair.

The Group considered the matter at its meeting on the 15th January 2016.

4.4   Appendix 4 – Charging exemptions on Sundays

<u>Carmarthen</u>

- St Peters car park - charges will apply from 12.00 to 18.00.
- Priory Street car park - no charges.

<u>Newcastle Emlyn</u>

- Castle car park - no charges.

<u>Llanelli</u>

- Vauxhall and Church Street car park's - charges will apply from 12.00 to 18.00.
- Edgar Street car park - no charges.

<u>Ammanford</u>

- Carregaman car park - charges will apply from 12.00 to 18.00.
- Wind Street and Baltic car parks - no charges.

4.5   Appendix 5 – Task & Finish Group meetings and attendance

Meeting	Councillors Present	Officers Present
Thursday 24th September 2015 10:00am Democratic Services Committee Room, County Hall	Cllr. Peter Cooper Cllr. Alun Davies Cllr. Ivor Jackson Cllr. John Jenkins	Steve Pilliner John McEvoy Matthew Hughes
Monday 9th November 2015 10:00am Committee Room 1, Spilman Street	Cllr. Peter Cooper Cllr. Alun Davies Cllr. Ivor Jackson Cllr. Elwyn Williams	Steve Pilliner John McEvoy Matthew Hughes Kevin Thomas
Thursday 17th December 2015 10:00am Democratic Services Committee Room, County Hall	Cllr. Peter Cooper Cllr. Alun Davies Cllr. Ivor Jackson Cllr. Elwyn Williams	Steve Pilliner Matthew Hughes Kevin Thomas
Friday 15th January 2016 10:00am Committee Room 1, Spilman Street	Cllr. Peter Cooper Cllr. Ivor Jackson Cllr. Elwyn Williams	Steve Pilliner John McEvoy Matthew Hughes Kevin Thomas
Tuesday 9th February 2016 10:00am Committee Room 1, Spilman Street	Cllr. Peter Cooper Cllr. Alun Davies Cllr. Ivor Jackson Cllr. John Jenkins Cllr. Elwyn Williams	Steve Pilliner John McEvoy Matthew Hughes
Thursday 21st April 2016 2:00pm Democratic Services Committee Room, County Hall	Cllr. Peter Cooper Cllr. Alun Davies Cllr. Ivor Jackson Cllr. John Jenkins Cllr. Elwyn Williams	Steve Pilliner John McEvoy Matthew Hughes

4.6   Appendix 6 – Bibliography / References

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RAC Foundation
July 2012
http://www.racfoundation.org/assets/rac_foundation/content/downloadables/spaced_out-bates_leibling-jul12.pdf

(Ctrl+Click to follow the hyperlinks and read the documents)

4.7   Appendix 7 – Glossary of Terms

ANPR	Automatic Number Plate Recognition
BID	Business Improvement District
CCTV	Closed Circuit Television
EU	European Union
IPS	Integrated Parking Strategy
P+R	Park and Ride
Park Mark	The Safer Parking Scheme is a national standard for UK car parks that have low crime and measures in place to ensure the safety of people and vehicles. A 'Park Mark' is awarded to each car park that achieves this standard.
PATROL	The Joint Committee of England and Wales for the civil enforcement of Parking and Traffic Regulations Outside London
RAC	Royal Automobile Club
TRL	Transport Research Laboratory
VAT	Value-Added Tax