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Research into Car Park Charging Strategies

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1. Introduction

- 1.1 The 2017-18 Budget allocated £3m to local authorities to pilot free car parking in town centres. This funding was agreed as part of the 2017-18 Budget Agreement between Welsh Government and Plaid Cymru. This followed an agreement with Plaid Cymru to “explore further the desirability of setting up a new fund to enable local authorities and community groups to offer free car parking in towns throughout Wales, providing a vital boost to town centre regeneration”.
- 1.2 The purpose of the funding is to support pilots in every local authority to explore car parking strategies with a view to generating a positive impact on Welsh town and city centres.
- 1.3 To support the pilot, Knowledge and Analytical Services (KAS) within Welsh Government, were asked to undertake research to enable a fuller understanding of the evidence of a link between free car parking and town centre footfall, as well as the views and experiences of local authorities on free car parking.
- 1.4 The specific aims of this research project were to:
 - explore the literature on car parking strategies, and specifically on the relationship between car parking strategies and town centre footfall/visitor numbers; and
 - develop an understanding of current local authority practice in Wales.
- 1.5 To meet these aims, a literature review was undertaken and a survey was developed and distributed to all local authorities in Wales.
- 1.6 The literature review sought to provide an understanding of various car parking strategies from across the UK and beyond, where relevant. The review also sought evidence of links between car parking strategies and town centre footfall/visitor numbers. The review findings are presented in section 3.
- 1.7 The survey of local authorities sought to gain an understanding of the various car parking charges and strategies used by local authorities, and the perceived benefits and challenges of implementing completely free all day car parking. Responses were received from all 22 local authorities. The responses were analysed and are presented in section 4.

2. Methodology

Literature Review Methodology

- 2.1 Library services in the Welsh Government conducted a search which reviewed literature within online databases of journals and articles, reviews, reports and government documents. The exact sources searched were British Parking Association, Department for Communities and Local Government, Department for Transport, Edinburgh Napier University, Emerald Fulltext, Federation of Small Businesses, Ingenta Connect, Institute for Transportation and Development Policy, PAIS, Proquest Social Sciences Premium Collection, RAC Foundation, Taylor & Francis, Transport Research Laboratory, Transport Select Committee and Web of Science.
- 2.2 The search terms used to identify relevant literature were car parking, car parking strategies, car parking models, impact of free car parking, car parking and footfall in town centres, car parking and town centres and access to free car parking.
- 2.3 The original search undertaken by library services found 14 journal articles and reviews, nine sources of research and reports, 13 government documents and six books. The search was then narrowed down to identify which items were most relevant to the topic of car parking charges and strategies. The search was narrowed down to 10 items which held the most relevance to the subject matter.

Local Authority Survey Methodology

- 2.4 An online survey was designed and distributed to all 22 local authorities in Wales. The initial deadline for the survey was extended twice in the hope of encouraging responses; the survey was live from 16th March 2017 until 13th April 2017.
- 2.5 Up to two contacts were emailed in each local authority. An initial email included the survey questions to enable respondents to discuss answers with the relevant contacts before beginning the survey. A follow-up survey then contained the link to the survey itself.
- 2.6 The survey contained a series of closed and open-ended questions to gain both quantitative and qualitative answers. Analysis of the data collected was undertaken on Excel, with thematic analysis on the open-ended questions.

3. Findings: Summary of Literature Relating to Car Parking Charges and Strategies

Introduction

- 3.1 The objective of this review is to provide an understanding of the car parking charging strategies which are currently in place, the impact these strategies have on town centre prosperity and footfall, and what other factors, separate to car parking charges, influence why people visit town centres.
- 3.2 The literature search identified research which outlined various parking policies and provisions, and attitudes towards these, as well as views on the importance of various factors in relation to the town centre vibrancy held by businesses, employers and shopkeepers, employees and visitors to the selected town centres.
- 3.3 The specific focus of the review was the relationship between car parking charging strategies and footfall/visits to town centres. However, the majority of literature identified in the initial search discussed car park charging policies in relation to space management and utilisation rather than the implementation and impact of car parking charging models and strategies. There was also a lack of information about free all day parking as opposed to partially free parking or incentivised parking. Therefore, the literature included in this summary has been chosen with regards to relevance, focusing solely on car parking charges and strategies.
- 3.4 There is insufficient literature available regarding the impacts of free car parking schemes, UK and worldwide, but the evidence base does help to form a fairly comprehensive understanding of other common pricing strategies and their benefits. From assessing the literature found in the initial search, it is difficult to evidence a clear relationship between car park charging strategies and town centre footfall at this stage. Hence the Welsh Government decision to undertake primary research to explore local authority experience and strategies of town centre car parking charges (this is reported in section 4).
- 3.5 The literature search revealed large evidence gaps concerning the relationship between car park charging strategies and town centre footfall/health. MRUK (2015) prepared a report for the Welsh Government with the aim to explore the link between car parking charges and town centre footfall. However, even with the sole aim of evidencing this link, the report noted a lack of robust evidence linking car parking charging strategies and footfall.

Main Findings

- 3.6 Research drawn on throughout this review did not always measure the impact of a pricing strategy scheme. 'Free after three', a campaign used across London Councils is mentioned in Tyler et al (2012) but the impact this scheme has had on the area and those taking advantage of it, was not discussed. A report undertaken by the British Parking Association by McDonald (2013), does present a correlation between a reduced parking cost and an initial increase in footfall but the report did not look at completely free car parking.
- 3.7 The evidence indicates that there are contrasting views on the importance of completely free car parking. Interviews with small business owners and employers as part of the MRUK research indicated a perception that car parking charges are the most important reason for a decrease in footfall in their town or city centres, and that free car parking would increase revenue and business. This contrasts with statements from visitors to the town and city centres who reported that the availability of spaces, traffic flow within the centre and signage were more important in determining visitation rather than the cost of parking itself (MRUK 2015). Only one source of literature found in the search, was able to validate the opinion that free car parking would increase footfall. An evaluative study by Van Der Waerden et al (2009) used a questionnaire to ascertain travel and shopping behaviours before and after the introduction of paid parking in an individual's town or city centre. The results of the questionnaire showed a considerable decline in shopping behaviour and consumer expenditure after the introduction of paid parking. In this case, change in consumer expenditure was linked to visit frequency which was significantly dependent on car parking charges.
- 3.8 The impact of completely free car parking, as mentioned previously, has generally been under-researched. However, two case studies within a Wales specific context are mentioned in MRUK (2015). Wrexham and Denbighshire County both implemented completely free all day car parking throughout a period of time and measured the impact that this had on usage and footfall. In Wrexham, monitoring showed that within the free multi-storey car park, excess demand (from workers and visitors) led to visitors being unable to find a space.
- 3.9 In Denbighshire County, similarly to Wrexham, the free all day car parking was taken up by workers in the town rather than visitors. A report published by RGDATA (2013) also looked at the model of completely free car parking and claimed that this can be found to lead to excess demand, resulting in more congestion in the

town/city centre, and more visitors spending their time cruising to find an available space rather than spending time and money within the centre.

3.10 Weinberger et al (2010) touched on parking policies in the U.S which manage demand through pricing, and concluded that free or low cost on-street parking is actually seen to largely benefit employers and shopkeepers who obtain these spaces earlier than any potential visitors. This negatively affects footfall, with excess demand for spaces, and by providing benefits to those it may not necessarily be aimed at.

3.11 There is some evidence that business owners and shopkeepers tend to believe that footfall and consumer expenditure is based on car parking prices, whereas visitors to the town centres generally base their decision to visit the town centre on other factors. The review of London Councils (Tyler et al 2012) suggests that parking fees are correlated with the level of service in an area, and willingness to pay for parking is not seen as a fundamental influence on increasing or decreasing footfall:

“In opposition of offering free or cheaper parking as an offer to attract people to retail centres, the TRL report (2010) (citing evidence from Betts (2009) and Litman (2010)) explains that parking fees can be correlated to the level of service in an area (quality of retail mix). For example, a convenient, diverse and quality mix of retail will attract people to one centre over another, even if the second centre offers free parking.”

3.12 This is based on a case study showing a 50% increase in parking costs within an area that did not see a change in parking patterns.

3.13 A report by McDonald (2013) suggests that the number of parking spaces as opposed to the cost of parking will initially increase footfall. The study identified a number of parking measures which affect an increase or decrease in visits. These included parking and payment methods, enforcement and fines, security, provisions for disabled users, location of the parking and the quantity of spaces. When also looking at what determines decisions to visit a town/city centre, MRUK (2015) finds that out-of-town competition such as retail parks, the economic vibrancy of the town centre and the size of the town centre in comparison to the county are all important factors. The report also includes statements from typical town centre visitors, who feel that the availability of spaces, traffic flow within the town centre and signage were more important in determining visitation rather than the cost of parking. The report concludes that the cost of parking cannot be looked at in isolation to

convenience and availability of the car park. Another study found that the decision to reduce the number of visits to the town centre made by potential visitors was due to feeling burdened by parking restrictions as opposed to the cost of parking (Palmer & Ferris 2010).

- 3.14 Pricing strategies which focus on measures to incentivise parking, and encourage visitors to spend in the town centre appear to be favoured over offering completely free parking. A case study in Swansea saw an increase in consumer expenditure when using incentivised parking through a loyalty card for NCP, or a voucher for a coffee shop in the city centre. This encouraged a longer stay and subsequently more spending during each visit. NCP statistics confirm that these incentives did encourage a longer stay in the car parks (MRUK 2015). Straker et al (2009) explored the practicalities, use and impact of incentivised parking as a pricing model. As the paper focused on staff parking strategies, it is not totally relevant to our research questions which seek to understand visitor parking strategies and in particular free car parking models. However, the report does indicate that incentives as a form of free parking strategy can be successful when used in conjunction with a combination of other parking measures.
- 3.15 The literature review found other pricing strategies to manage parking, but none of which had the aim of increasing footfall. The goals of the other pricing strategies such as demand-based or performance-based pricing (Pierce & Shoup 2013) were to ensure an optimum occupancy rate of the spaces, a spike in turnover of usage, or to improve traffic congestion (Simijevic et al 2013). San Francisco's *SFPark* Scheme can be seen as an example of demand-based or performance-based pricing as it includes parking meters which charge varying costs according to the time of day (Pierce & Shoup 2013). Other versions of this scheme see city centres aiming to reduce congestion by spreading the concentration of visitors through various 'zones' of the city. Simijevic et al (2013) mentions a zoning system with three different zones all with their own parking models. Demand-based and performance-based parking is therefore beneficial to the management of car parks and traffic flow due to the ability to target congestion whilst increasing turnover and expenditure. As mentioned previously, free car parking can be seen to reverse the effects of paid parking schemes by increasing congestion, reducing easy traffic flow and deterring some visitors away from occupying the spaces due to inconvenience.

- 3.16 The evidence that is available suggests that while car park charging strategies are important, and can have an impact, this is largely influenced by local factors and some strategies, such as completely free car parking can have the opposite effect to that intended. As is illustrated by the case studies of Wrexham and Denbighshire County mentioned in the MRUK (2015) report, where free car parking was implemented the result was an increase in congestion and the free spaces being taken up by those working in the town centre. In these instances, free car parking actively discouraged potential visitors from visiting the town centre.
- 3.17 The evidence considered as part of the literature review also points to the importance of a range of variables, some related to car parking such as access and signage, but also those which will vary from town centre to town centre – such as what the town centre can offer visitors. Altering car park charging strategies is one of many levers that can potentially affect town centre health, but there is little evidence to suggest that, in isolation, it will have a positive affect.

4. Findings: Local Authority Survey

4.1 A survey designed by Knowledge and Analytical Services was distributed to 22 local authorities across Wales and achieved responses from all 22. Completion of all survey questions was not mandatory, so for some questions not all 22 local authorities have provided a response. On some questions, the local authorities were able to provide more than one response.

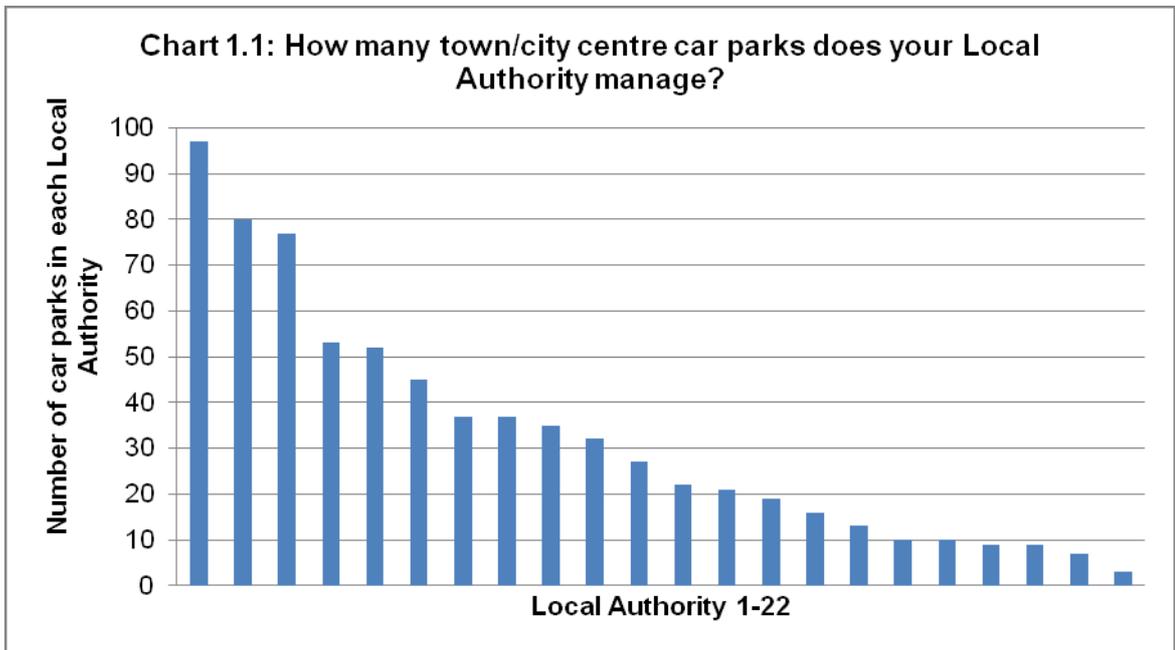
4.2 The purpose of the survey was to:

- gather empirical data on the number of car parks and spaces they manage; and
- seek the views of the local authorities on what they believe are the benefits and challenges of offering free car parking, how this may have been implemented currently or previously and in addition to the possibility of piloting free car parking, which other parking strategies they would wish to explore. A copy of the survey can be found in Annex A.

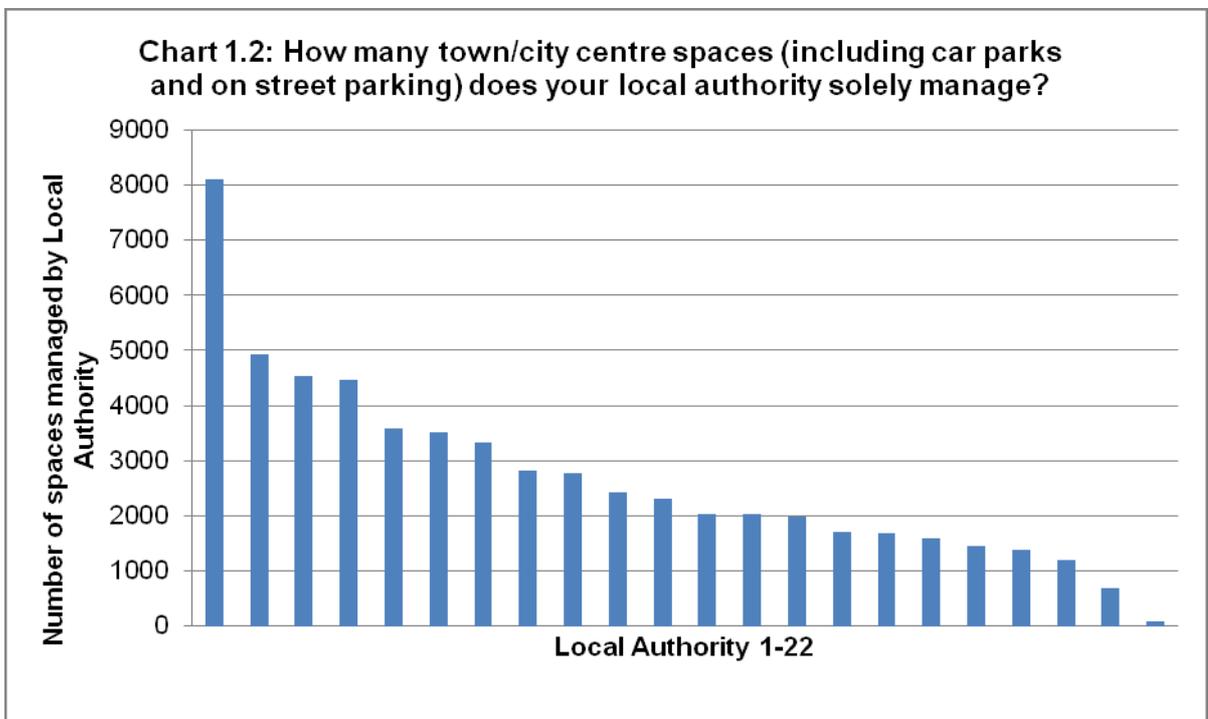
Number of Car Parks/Spaces

4.3 The local authorities were asked to provide information on both the number of car parks within their local authority as well as the total number of car parking spaces available in the local authority.

4.4 As Chart 1.1 below illustrates, the number of local authority managed car parks varied from three to 97. While 13 local authorities owned more than 20 car parks, only three were responsible for 60 or more. This is likely to reflect the size of the local authority as well as the existence of privately owned car parks. Indeed 20 of the 22 local authorities responding, reported having privately owned car parks in their local authority. The number of privately owned car parks operating in each local authority area ranged from one to 12.



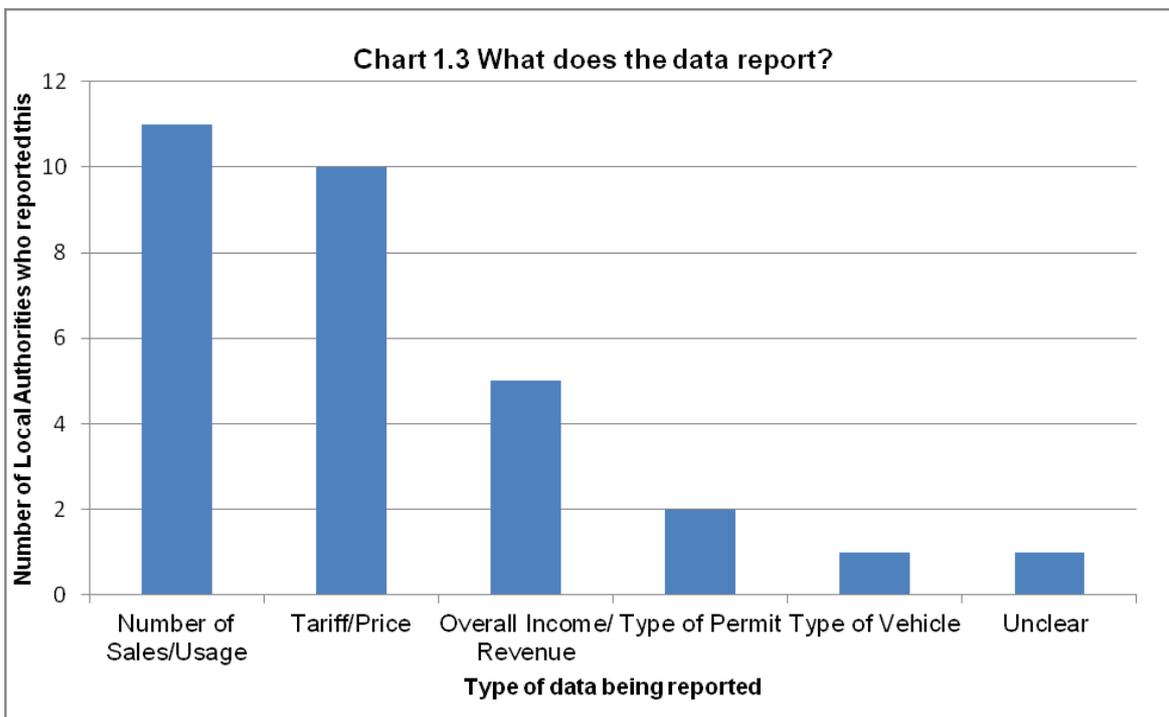
4.5 Local authorities were asked how many car parking spaces they manage and numbers ranged from 80 to 8,100. Although one local authority reported managing 8,100 spaces, most (19 of 22) managed between 1,000 and 5,000 spaces, as illustrated in Chart 1.2 below.



4.6 The survey asked for the revenue generated from car parking in each local authority in the last financial year, 2015/16. The average revenue generated was £942,991 between a range of £0 in a local authority which already implements completely free

car parking, and £2,614,603. Note that these figures in some cases have included all permit sales as well as pay and display parking tickets.

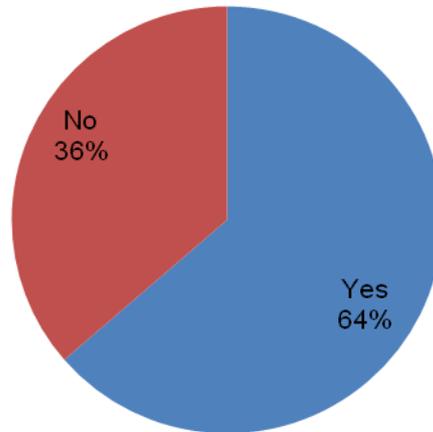
4.7 When asked whether they collect monitoring data on car parking usage; most local authorities (18 out of 22) reported data was collected. Most of this was collected electronically and through metric machines/systems (eight of 18, with others undertaking surveys and a car parking review of the data (four of 18). This data was generally reported to provide the number of ticket sales, car park usage and the tariff or price of a particular sale.



Free All Day Parking

4.8 Local authorities were asked whether they currently provide free all day car parking in their local authority-run car parks, with 14 out of 22 responding that they do provide this. Four of the six local authorities who reported they do not offer this, stated that they previously had. The decisions to stop providing free car parking included opening and closing costs of the car park not being supported, to increase revenue, to encourage public transport and to provide a consistent approach to car parking across the county.

Chart 1.4: Do you provide free all day car parking in your local authority managed car parks?



Benefits

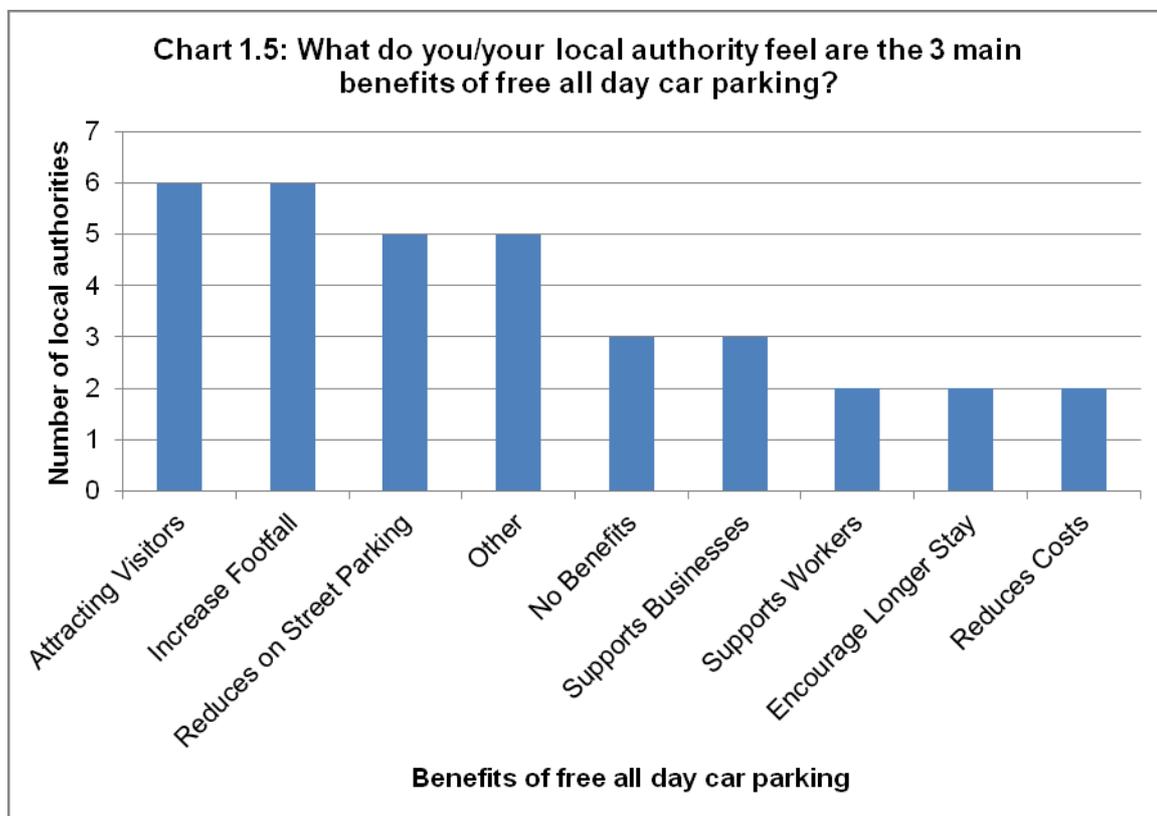
- 4.9 The main body of the survey contained open-ended questions which encouraged the respondents to give fuller detail on their perceptions of the impact that free car parking offers have on the town/city centre, what they believe are the main benefits or challenges of implementing this and what other car parking models they would wish to explore, or believe are more beneficial than free car parking.
- 4.10 It should be noted that two local authorities did not give any response when asked about the benefits of free car parking, and although one local authority provided a response this was to report that they could not think of any benefits. The analysis below reports on the 19 responses where benefits were identified. For the rest, although the question asked for three benefits, most local authorities provided less than this.
- 4.11 The most commonly perceived benefit of free car parking which was mentioned by 12 of the 19 local authorities who responded, is the belief that free car parking would increase footfall and/or attract visitors to the area, who may have previously been deterred from using the town centres due to the cost of parking. As well as initially encouraging visitors to the area, it is perceived that the removal of car parking fees may increase dwell time and encourage a higher expenditure in the centre:

“Encouraging visitors to the towns - such as shopping visits or leisure. increases footfall - with the hope that visitors spend more in shops.”

- 4.12 Local authorities also appreciate the view of business on free car parking:
“[There is] a perception by businesses that it will support the footfall and vibrancy. Visitors may be happy to spend longer in the retail centres as they do not have to think about a time limit on parking.”
- 4.13 Improving dwell time and the hopes of increasing expenditure in the town centres is also noted as a benefit by two respondents.
- 4.14 Five local authorities felt that free car parking would support people working in the area as well as supporting business owners. One local authority with a positive perception of free car parking stated that:
“It removes what is considered a significant barrier to visiting and shopping in town centres, as opposed to retail parks and supermarkets, and goes some way to matching the parking provision usually offered by them. Increased footfall also leads to increased business, which significantly improves the economic state of the town centre. Supports business start-up and expansion, as parking arrangements for customers and staff often form part of such a decision making process. [It] Strengthens the platform from which town centres could be marketed as a place to work and visit.”
- 4.15 This comment recognises that free car parking can be used as a platform to support start-up businesses by removing any issues that potential staff and customers may face in being able to access it, if located in the town centre.
- 4.16 One local authority felt economic activity could be stimulated in quieter periods of the year with the offer of free car parking, continuously encouraging visitors and expenditure that may otherwise be diverted elsewhere.
“[It will] stimulate retail trade at quieter times of the year [and] motivate town centres to organise events to encourage people to visit town centres”.
- 4.17 In some cases, free car parking schemes was perceived to reduce costs, with one respondent pointing out that the removal of enforcement and cash collection could reduce costs.
- 4.18 An issue that five local authorities raised was visitors to the town centres occupying residential spaces. It was felt that free car parking could encourage visitors to park in car parks as opposed to using residential parking (although it was not clear whether this assumption had been tested).

4.19 Three respondents were unable to identify any perceived benefits at all of implementing free car parking:

“Due to the likely negative impact on availability of spaces, short term turnover and footfall, it is difficult to establish any positive outcomes from free all day parking”.



Challenges

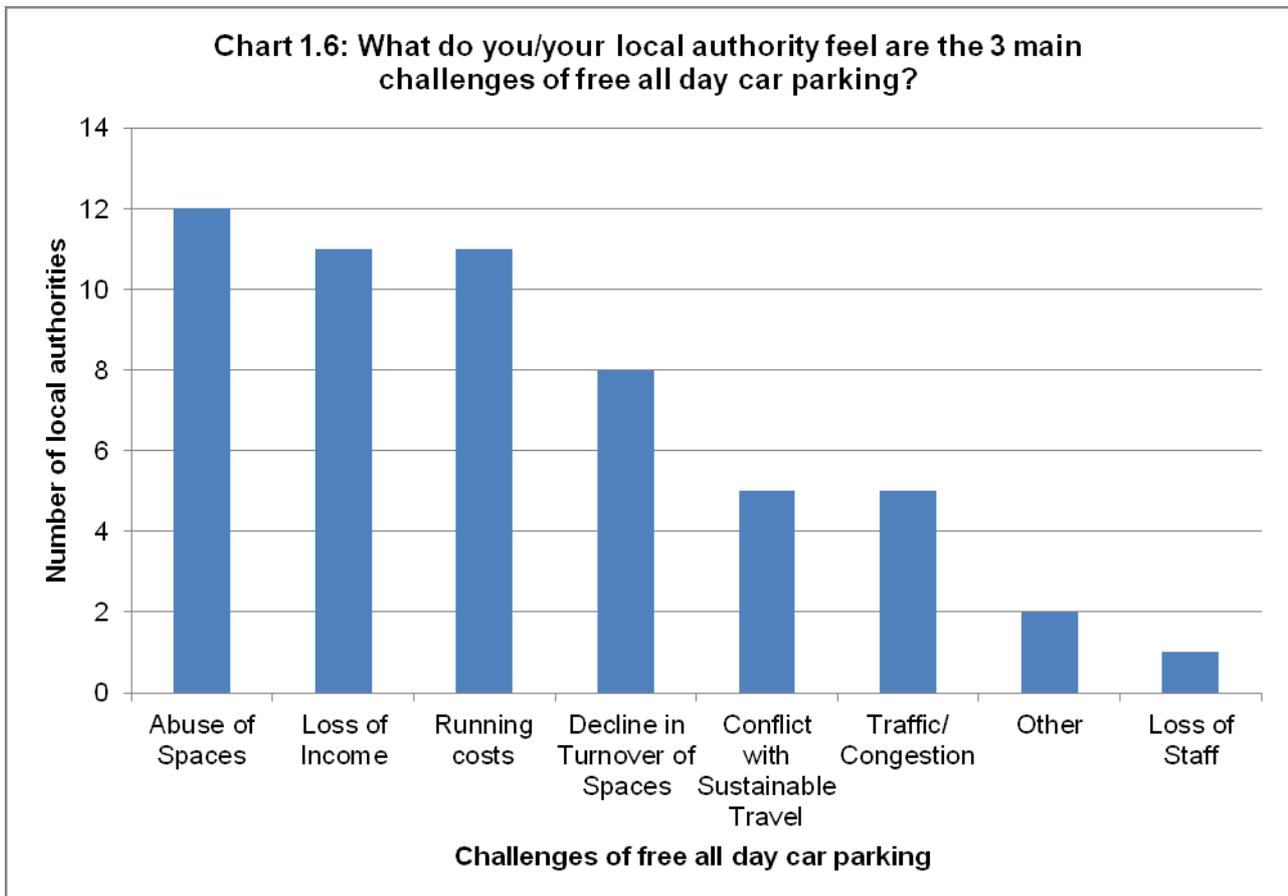
4.20 Slightly more local authorities provided comments as regards the challenges of free car parking than benefits and more local authorities provided the three challenges asked for (in some cases more). Therefore, in total more comments were received as regards the challenges of free car parking than were received for the benefits. Within the challenges, themes emerged surrounding a loss of income, abuse of the system and a negative impact of footfall and expenditure due to the decline in turnover of spaces.

4.21 The most frequently mentioned challenge (mentioned by 12 of the 20 local authorities who responded) was that free car parking spaces are used by commuters rather than town centre visitors. Following this the second most frequently mentioned challenges (both mentioned by 11 of 20 local authorities)

concerned costs – where local authorities saw a loss of income as well as then being unable to support maintenance costs. The removal of car parking fees was felt to leave local authorities having to find other ways to cover car park running costs as well as potentially some staff costs. One local authority also mentioned the loss of staff such as admin support staff who may no longer be required after the removal of parking fees. One respondent stated that *“No town centre parking facilities are ‘free’. The County Council incurs costs to operate safe and accessible parking facilities”*.

- 4.22 Two respondents felt that implementing a free car parking scheme hands over control of the car parks to the general public, *“[There is] no control over parking spaces which are used for long stay use by commuters and town centre workers”*. The decline in turnover, which was mentioned in eight responses, is felt to be largely due to spaces being filled by groups other than those intended: *“Turnover of space is extremely important to ensure shoppers can access parking. Free car parking will see such spaces filled up with commuter cars thereby frustrating shoppers.”* This may effectively mean the spaces are being used as a ‘park and ride’ facility for commuting, *“Members of the public using the car parks for other purposes i.e. park and ride facility, saturating the car parks and affecting their availability for visitors and shoppers.”* One local authority mentioned that although a benefit of free car parking may reduce the occupation of residential spaces by visitors; this may present a challenge due to displacement occurring with all free spaces being occupied, forcing visitors to park in residential spaces once again.
- 4.23 In relation to wider challenges, three local authorities noted that free car parking schemes conflict with the promotion of sustainable transport. The option to park for free in the town centres discourages visitors to use modes of sustainable travel, therefore causing policy conflicts for these local authorities. Revenue generated from car parking charges can also be used to promote sustainable transport, *“Revenue from town centre car parks enables local authorities to support the delivery of key highway and transportation related services”*. Further to this, especially for larger town and city centres, a scheme which encourages car travel is likely to negatively impact upon traffic and congestion. *“Free all day parking would be likely to induce demand, cause an increase in congestion and pollution, and make active modes and public transport a less attractive option.”* The local

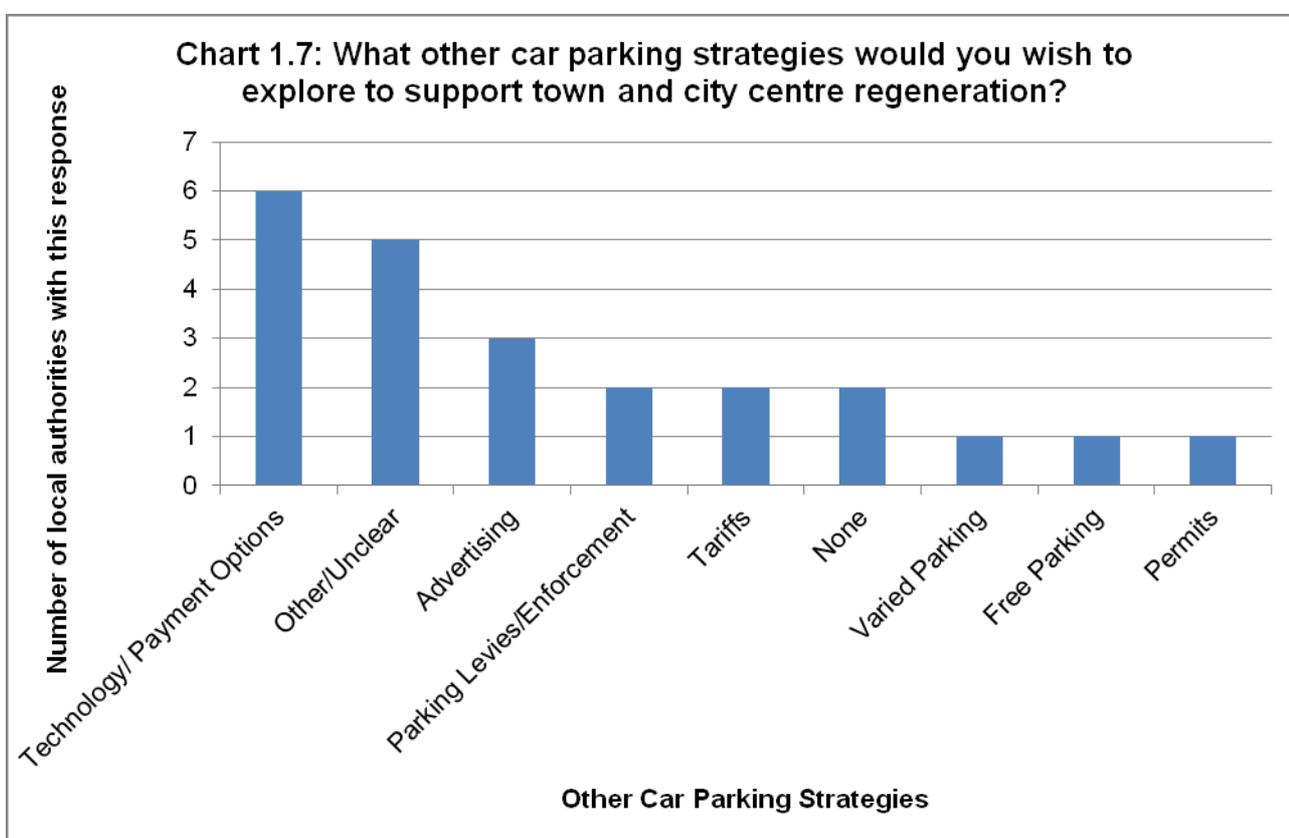
authorities' responses on this matter showed concern for the increase in congestion and pollution that free car parking would cause.



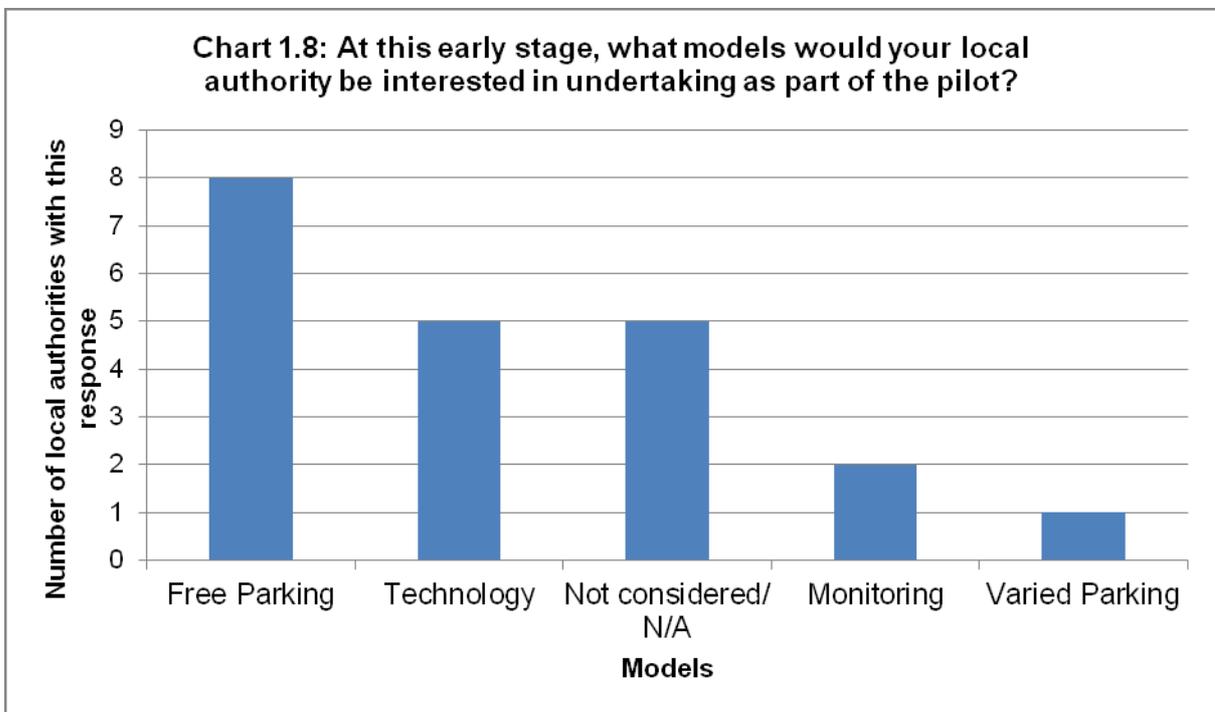
Other Strategies

4.24 The survey asked local authorities which other parking strategies they wish to explore, and what models they may be interested in pursuing. The most common strategy mentioned (by six of the 20 local authorities who responded) was an exploration into the use of technology payment options and Automatic Number Plate Recognition (ANPR) for the benefits of data collection, and barrier-less exits. ANPR controlled car parks with cashless/account-based payments are perceived as being useful by the local authorities in an effort to improve customer experience. Other technology-based payment methods such as ‘oyster’ style pre-paid cards are being considered by one local authority.

4.25 Variable pricing strategies and tariff bands were also noted as being potential strategies to consider. Two local authorities recorded that they have used 30 minute and one hour tariff bands. Waiting bays of 30 minutes mentioned as ‘shop and drop’ and ‘pop and shop’ bays are also under consideration for implementation by two different local authorities. This allows for a frequent turnover of spaces whilst keeping costs at a minimum. One local authority used Park and Ride facilities as a strategy due to allowing more space for short stay parking, again increasing a turnover of spaces and appearing favourable to visitors of the town centre. One local authority responded that they would wish to explore more offers of free parking.



4.26 Despite the challenges outlined in this section and the responses to the question above, eight of 19 local authorities who responded would like to further explore free car parking as a potential Welsh Government pilot scheme, as shown in chart 1.8. Of the eight, five local authorities already offer free car parking, while three do not. It should also be noted that of those local authorities who did not identify free car parking as an option to explore, nine already offer some form of free car parking.



4.27 However, some seemed wary of the financial implications of free car parking, with the current financial climate not in a state to support free car parking, even with good intentions from the local authorities to implement this. One response stated that there is a:

“need to establish the business case for implementing free parking having a sufficient economic impact on the local economy for Welsh Government/Local Councils to support the required investment. For the Local Authority to currently implement free parking in the existing financial climate we would require the lost income to be made good.”

4.28 Further to this, some felt that they are not aware of the impacts this scheme would have due to no previous implementation of this and no recorded impact.

5. Summary and Conclusion

- 5.1 Evidence suggests that the influence of variables, other than car parking, on an individual's decision making process when choosing to visit the town/city centre need to be considered. MRUK (2015) states the importance of other variables such as traffic flow, proximity of the car park to the town centre and vibrancy of the town centre itself.
- 5.2 The offer of free car parking in town and city centres can be seen to have numerous benefits such as attracting visitors and increasing footfall, encouraging a longer stay for visitors, reducing costs, reducing on-street parking and supporting local businesses and workers in the town. However, many challenges are also presented with a free car parking scheme such as running and maintenance costs no longer being supported by parking fees, a decline in turnover of spaces, a loss of income, loss of staff, abuse of spaces, traffic and congestion issues, and finally, conflicts with sustainable transport policies.
- 5.3 The evidence considered as part of the literature review in section 3 also points to the importance of a range of variables, some related to car parking such as access and signage, but also those which will vary from town centre to town centre – such as what the town centre can offer visitors. Altering car park charging strategies is one of many levers that can potentially affect town centre health, but there is little evidence to suggest that, in isolation, it will have a positive affect.
- 5.4 Typically, increasing footfall is seen as the key reason for implementing free car parking; however as the literature review in section 3 outlines, no evidence was found of a link between free car parking and an increase in footfall or visitor numbers to a town centre. Visitor footfall is not always increased as a result of free car parking, and there is in fact no clear relationship between the two factors. One response to the survey completed as part of this project stated *“We agree with the 2015 WG [MRUK] report which found no relationship between town centre footfall and free parking. Our view is that all day free parking may in fact have a negative effect as it is used mainly by workers or nearby residents as a free private garaging facility”*.
- 5.5 The literature does illustrate that local businesses generally perceive free car parking as highly beneficial in supporting their businesses. The survey of local authorities also indicates that they share this view or at least are aware of this perception from businesses. However, there is the acknowledgement from local

authorities responding to the survey that free parking spaces are often not occupied by visitors to the town centre, but instead by workers and commuters.

- 5.6 Available evidence suggests that while car park charging strategies are important, and can have an impact, this is largely influenced by local factors. The literature suggests that some strategies, such as completely free car parking can have the opposite effect to that intended, a finding which is supported by the responses of local authorities to the survey undertaken for this project. As is illustrated by the case studies of Wrexham and Denbighshire County mentioned in the MRUK (2015) report, where free car parking was implemented, the result was an increase in congestion and the free spaces being taken up by those working in the town centre. In these instances, free car parking actively discouraged potential visitors from visiting the town centre.
- 5.7 When local authorities were asked to comment on the benefits and challenges with free car parking, more comments were received concerning the challenges, than the benefits.
- 5.8 While the main benefit of free car parking was reported as the positive impact it was perceived to have on attracting visitors to town centres and increasing footfall in general, a higher volume of comments were received related to the challenging reality of offering free car parking. Namely the financial impact through loss of income and running costs, but also the fact that free parking was often taken up by those it was not intended for, such as commuters.
- 5.9 The offer of free car parking may conflict with current policies that are in place within local authorities encouraging modes of sustainable transport.
- 5.10 However, a number of local authorities have expressed an interest in exploring free car parking via the pilot. There is also interest in further exploring technological developments such as ANPR and other modes of cashless payments.
- 5.11 The evidence gathered as part of this small research project suggests that there is no definitive link between free car parking and town centre health, although the perception of this link is strong from a business perspective and also within a number of local authorities.
- 5.12 Given the interest in exploring free car parking further in the proposed pilot, it will be vital to ensure that the monitoring of any pilot looks at the impact of free car parking or other strategies on town centre footfall/visitor numbers.

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Annex A

Car Parking Charges Survey Questions

Local Authority owned car parks

This section asks questions about car parks that are owned by the local authority only.

1. How many town/city centre car parks does your local authority solely manage?
2. How many town/city centre spaces (including car parks and on-street parking) does your local authority solely manage?
3. Do you have any data on car parking usage in your local authority?
4. If yes, how is this data collected?
5. What does this data report?
6. From your own estimation, what percentages of your car parks are in use during business hours on an average working day?
0-25%, 26–50%, 51-75%, 76-100%
7. What was the revenue generated from car park charging in your local authority during the last financial year, 2015/16?
8. Do you have systems currently in place that would support the monitoring of performance indicators relevant to car parking, such as space availability and footfall?

Privately owned car parks

9. Are there any privately owned car parks in your town/city centre?
10. If yes, how many?
11. Is your Local Authority working alongside any private operators to manage car parking within your areas?
12. Please outline any arrangements.

Car Parking Strategies

This section asks questions about car parking strategies that local authorities have used and their experiences of them.

Free all day parking:

13. Do you provide free all day car parking in your local authority managed car parks?
14. Have you measured the impact this may have had on the relevant town centre?

15. If impact not measured, did you perceive any impact on town/city centres? (Please explain)
16. Have you previously offered free all day car parking in your town/city centres?
17. Why was the decision made to stop free all day parking?
18. If not, please outline reasons why
19. How was/is the free all day car parking funded?
20. What do you/your local authority feel are the three main benefits of free all day car parking?
21. What do you/your local authority feel are the three main challenges of free all day car parking?
22. Does the offer of free car parking conflict with any other of your local authority policies?
23. What local authority policies does free car parking conflict with?

Other car parking strategies:

24. Have you utilised any of these car parking strategies in the past three years?
 - All day free parking.
 - One hour free parking.
 - One hour free parking and no return within two hours.
 - Two hours free parking.
 - Free parking outside of certain hours eg. before 8am and after 5pm.
 - Incentive eg. free parking when 'x' amount is spent in a designated centre/shop.
 - Incentive eg. free coffee in exchange for car parking ticket.
 - Pay by phone.
 - Other strategy.
25. Please provide more information on this strategy.
26. Please choose the selected strategy that you would say had the most impact on the town centre?
27. Why did that selected strategy have the most impact?
28. Have you measured/monitored the impact of your car parking strategies on town centres?
29. How has this been measured/monitored?
30. What has this monitoring shown?
31. What other car parking strategies would you wish to explore to support town and city centre regeneration?
32. How would you rate the importance of impact of each of the following on town centre footfall?
 - Signage

Location of car parks in relation to the town centre
Number of car parking spaces available
Improved access/traffic flows to car park
Improved car parking technology

Very Important, Quite Important, Not Very Important, Not at all important

33. At this early stage, what models would your local authority be interested in undertaking as part of the pilot?