Herefordshire County Council

Final Report: Car Park Charges Review

ALPHA PARKING

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1. Review Objective

1.1 Herefordshire County Council are aware of the importance of car parking facilities to the development and prosperity of the town and the county and are considering the car parking charges in conjunction with their strategy principles.

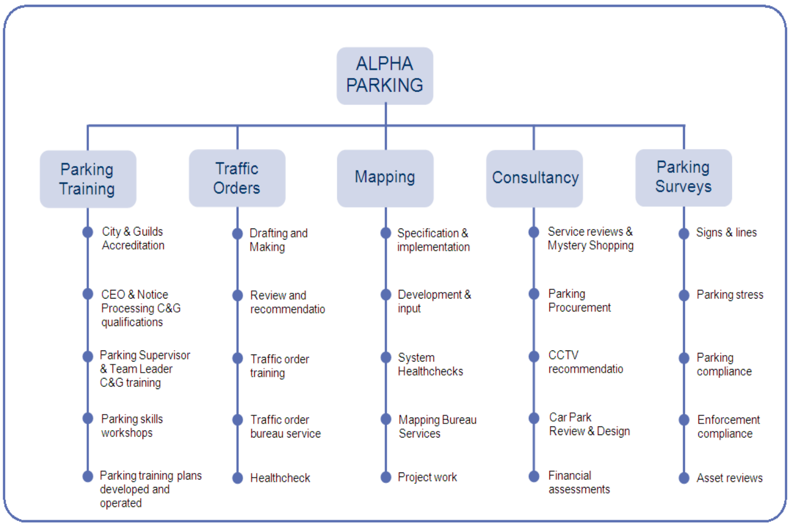
1.2 The review is to consider key areas such as:

- The offering to customers and stakeholders and the encouragement of local economic vitality
- Current and future capacity requirements
- Charging Strategy with the aim of meeting the parking strategy principles while maximising the overall possible return.
- Efficient operational development

1.3 The Council has instructed Alpha Parking to carry out a car park review and produce this report to explain the approach and results of the project and make recommendations.

1.4 Alpha Parking is an established, successful specialist parking consultancy focused on assisting public and private parking operations in all parking areas.

1.5 Our experienced teams have in-depth parking knowledge and skills split across the five areas in the diagram below.



2. Methodology

2.1 In order to obtain an overall understanding of the current Herefordshire car park position, the future projections and strategic requirements and therefore to recommend tariff changes we have carried out a number of exercises. These are described in the table below which indicates, as well, what each exercise contributes to the review.

2.1.1 Please note: the table does not indicate any priority or specific order; a number of the exercises where carried out concurrently

Review Process	Objective
1. Background research	To obtain an understanding of the Herefordshire area and major demographic factors which impact on the car parking requirements; for instance, economy, population types and forecast, transport and previous car park studies.
2. Review of transaction data obtained from the Council	Depending on the scope and detail of the transaction data available it can provide considerable information on recent car park usage in the County.
3. On site physical review of car parks	Assessment of customer offer and physical state.
4. Occupancy surveys of car parks	To review current usage and provide further information on transaction data issues
5. Focus group meeting with local stakeholders	Discussion group to gain information on stakeholder concerns and aspirations.

6. Car park customer consultation	Gaining input on car park users views on the car parks
7. Use of TEMPRO database	We access the government database to obtain information on future transport projections in the region and, therefore, potential parking capacity requirements.
8. Benchmarking	Obtaining of comparable car parking data from appropriate towns to compare and contrast with the Herefordshire offer.
9. Desktop review	Assessment of the results from the review processes combined with our experienced knowledge and development of tariff recommendations and any other suggested changes

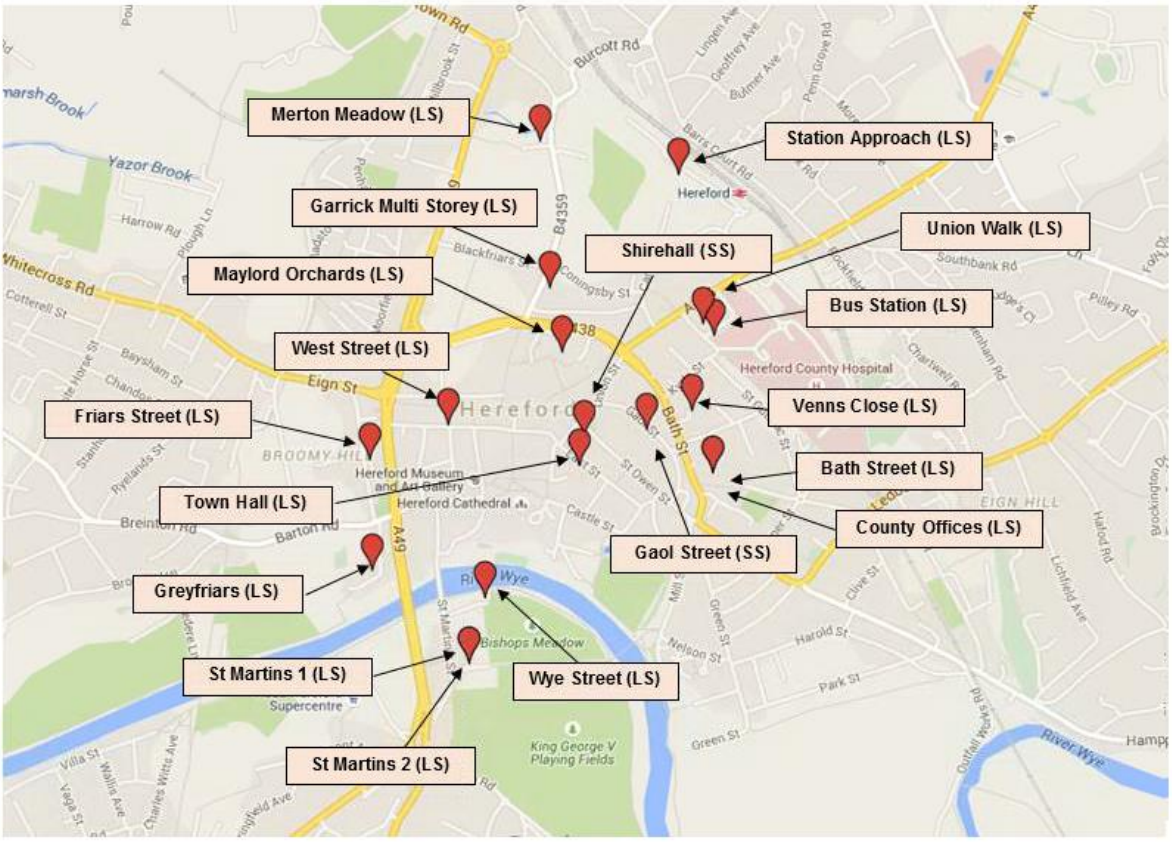
3. Current Car Park Situation

3.1 The Council wishes the study to address the car park situation in the county town of Hereford with reference to the market towns of Ledbury, Leominster and Ross-on-Wye

Hereford has a number of car parks which offer both long stay (LS) and short stay (SS) facilities. The table below summarises these and shows their position in the town.

We noted that there are a significant number of large privately operated car parks which potentially compete with those operated by the Council, we have considered this in considering possible changes. We note that this includes free parking offered by Tesco and Asda.

3.2 The Council car park locations in Hereford are shown on the maps below:-



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3.3 Hereford City: Car Park Income per Space Table

2014

Car Park	Type	Spaces	Visitors Income	Visitors Income Per space	Season Tickets Income	Season Tickets Income Per space	Penalty Charge Notices Issued	Penalty Charge Notices Income	Penalty Charge Notices Income Per space	INCOME	TOTAL INCOME PER SPACE
		No.	£	£	£	£	No.	£	£	£	£
Bath Street	SS	76	£100,237	1,319	17,670	233	501	10,434	137	128,341	1,689
Bus station	SS	100	£191,533	1,915	6,030	60	726	13,383	134	210,946	2,109
County Offices	SS	152	£0	-		-	192	2,427	16	2,427	16
East Street 1	SS	47	leased			-	50	767	16	767	16
East Street 2	SS	9	leased			-	13	364	40	364	40
Friars Street	SS	79	£14,547	184		-	51	1,280	16	15,827	200
Gaol Street	SS	130	£295,100	2,270		-	1,371	23,929	184	319,029	2,454
Garrick	SS	404	£272,194	674	4,785	12	735	12,327	31	289,306	716
Greyfriars	SS	69	£42,962	623	6,015	87	154	1,942	28	50,919	738
Maylord Orchard	SS	213	£442,641	2,078		-	66	1,282	6	443,923	2,084
Merton Meadow	LS	763	£567,303	744	22,900	30	785	11,875	16	602,078	789
Nelson Street		23	leased			-	47	930	40	930	40
Shire Hall		77	£16,797	218		-	132	1,414	18	18,211	237
St Martins 1+2	LS	192	£215,469	1,122	2,520	13	641	11,514	60	229,503	1,195
Station Approach	LS	189	£175,746	930	1,695	9		3,131	17	180,572	955
Town Hall	LS	45	£14,345	319		-	115	2,714	60	17,059	379
Union Walk	LS	27	£41,272	1,529		-	119	2,004	74	43,276	1,603
Venns Close		83	£65,072	784		-	140	2,400	29	67,472	813
West Street		73	£184,804	2,532		-	711	14,655	201	199,459	2,732
Wye Street		69	£91,219	1,322	6,555	95	222	3,933	57	101,707	1,474
Hereford Total		2,820	2,731,240	969	68,170	24	6,771	122,705	44	2,922,115	1,036

3.4 We find car park income per spaces tables such as this a very useful tool in assessing the parking usage, income and, therefore, tariff implications across a range of car parks within a local area. By focusing on the income per space within the short term and long term sites we are able to look at comparable data and note usage and trends.

3.5 Review of the table shows a number of interesting points including:

- Merton Meadow produces by far the most income from any one car park; this is a real cause for concern given its imminent reduction to one quarter of its existing size. The forecast is that income *at this car park* will reduce by nearly £350,000 on the basis that only 190 of the existing 460 users will be able to park. However it is expected that the majority will transfer to another site, thus relocating the source of the income with the overall

- West Street, Gaol Street, Bus Station and Maylord Orchard have a very high level of visitor income per space. The first three are also the leading car parks in terms of Penalty Charge Notice issue. This is believed to be the product of a high level of turnover. (As a Pay on Foot car park Maylord Orchard would not have large numbers of PCNs)

- One third of the season ticket income is via Merton Meadow

- The PCN income is very variable between the car parks which may reflect the compliance levels, the enforcement profile, payment methods or, indeed a mixture of these reasons.

3.6 These figures suggest that it would be useful to:

- Investigate how the reduction in capacity at Merton Meadow can be managed in terms of making alternative space available to the current users and ensuring traffic movements in the area are minimised

- Consider whether, as part of the above, season ticket use can be increased and more closely managed to ensure no single car park is targeted as a result of the above. This could include limiting the number of permits for each car park and ensuring that spaces are available on a reliable basis.

- Consider whether there are any risks or competition from neighbouring cities which would indicate any sort of limitation or restriction on how charges are structured.

3.7 Ledbury

- The charges at St Katherines car park were revised in Jun 2014 as was the maximum stay at Bye Street; this is now 3 hours, whilst the others remained as they were. It is suspected that this change will contain any stress at this car park for some time.
- The chargers are higher than similar towns in the benchmarking exercise and occupancy is low. As such there does not appear initially to be any reason to further increase the charges at this stage, or possibly for some while.
- There may be an argument to bring the charges at Bridge Street in line with the other car parks for the 4 hour charge; we estimate this would increase the car park return by approximately £3,000pa.

3.8 Leominster

- We notice that the Leominster charges were not increased in June last year and the charges are varied (according to location) and generally comparable with the average for the benchmarking towns.
- Consideration could be given to moving the 4 hour charges at Dishley, Etnam and Broad Streets to make them compatible with the equivalent charges in towns like Monmouth and Chepstow; this would mean an increase to £1.80 from £1.50.
- This change would put the car parks in the higher quartile of charges compared to other benchmark towns and, as the demand levels are fairly low, may cause a fall off in usage.
- An increase of this level would produce and estimated increased revenue of £41,000pa.

3.9 Ross-on-Wye

- The charges are clearly demarcated between central and fringe locations, with the exception of Kyrle Street which is a central car park charging a fringe cost of £1.50 all day; other central car parks charge £3.10 for over 4 hours. Bringing this car park into line could contribute an additional £4,000 to £7,000 a year depending on take -up.

- Though the tariff structures do not line up exactly, Ross on Wye's reasonably high tourist status means the car park charges are around 15% more expensive than Abergavenny, Monmouth and Chepstow,

4. Physical Review of Car Parks

4.1 An experienced member of our team visited each car park and carried out an asessment of its level of offer to the customer and, therefore, how attractive it is to the user. This provides important information when considering tariff levels at different car parks

4.2 The assessment includes consideration of:

- Car park type and size

- Opening hours and payment facilities: opening hours will influence the usage of any car park, payment methods have become more flexible in recent years with the introduction of facilities such as telephone payment and pay on foot/pay on exit. Many retailers tend to believe that the more flexible approaches encourage customers to stay longer and use their businesses. Studies to support this are inconclusive while cost and the physical requirements of pay on foot/pay on exit often dictate possible introduction.

- Accessibility to attractions within a 350 metre radius: as a guideline, it has been assessed, and is widely used in analysis, that the able bodied are willing to walk about 5 minutes from a short stay car park and 10-15 mins from a long stay one to reach the attraction which has caused their journey. Location of a car park is one of the most important points in its popularity and usage.

- How good is signage outside and inside the car park: good external signage will help to guide customers to the car park, this is especially relevant in a City where tourist trade is important. Good internal signage will improve the customer experience and thereby encourage usage of the site.

- Vehicle and pedestrian exit and entry points and ease of movement for vehicles and pedestrians within the car park: these areas will impact the customer experience and safety and thereby the service offer of the car park.

- Disabled and parent and toddler facilities; these are helpful to specific groups within the community, provision of these facilities is becoming more widespread and will influence usage of the car park by these groups.

- Internal and external car park presentation: good and attractive presentation of the car park is becoming expected by the customer and will influence their choice

- Car park security, including whether it has the ParkMark award for security.

4.3 The results of the assessment are shown in the tables below. There are two tables for each town, the first dealing with factual information, whilst the second is an assessment of facilities and conditions in the car park.

4.4 The review was carried out by an experienced member of the Alpha team; the numbered assessments are based on user 1-5 where 1 = “very poor” and 5 is “very good”. The assessment was carried out by a single, experienced, member of the team in order to encourage consistency in the judgements.

4.4.1

Car park name	Type	Spaces	Opening hours	Payment	No of attractions	Attractions
Bath Street	Surface	76	8:00hrs - 22:00hrs	P&D and Ringo	10	Restaurants, cafes, shops, hairdresser, bank, bars/pubs, religious facility, health facility, hotels, courts.
Goal Street	Surface	130	8:00hrs - 22:00hrs	P&D and Ringo	11	Restaurants, shops, hairdressers, pub, religious building, education facility, health care facility, hotels, courts, citizens advice burea, register office
Friars Street	Surface	N/A	8:00hrs -	P&D and	9	Restaurants, shops, hairdressers, religious building, education facility, health care

			18:00hrs	Ringo		facility, hotels, job centre, bingo hall,
Venns Close	Surface	83	8:00hrs - 22:00hrs	P&D and Ringo	7	Restaurants, cafes, shops, hairdressers, pubs, religious building, health care facility
Maylord Orchard	Surface	213	8:00hrs - 22:00hrs	P&D	9	Restaurants, cafes, shops, bank, pubs, religious building, education facility, hotels, courts
Shire Hall	Surface	N/A	8:00hrs - 22:00hrs	P&D and Ringo	12	Restaurants, cafes, shops, hairdressers, bank, pubs, religious building, education facility, health care facility, courts, register office, business centre
County Offices	Surface	N/A	8:00hrs - 22:00hrs	P&D and Ringo	9	Restaurants, cafes, shops, hairdressers, pubs, religious building, health care facility, hotels
Nelson Street	Surface	23	24/7	Permit holders only	6	Shops, pubs, religious building, education facility, hotels, nature area
Bus station	Surface	100	8:00hrs - 22:00hrs	P&D and Ringo	9	Restaurants, cafes, shops, hairdressers, pubs, religious building, hotels, bus station, vets (rspca)
Union Walk	Surface	27	8:00hrs - 22:00hrs	P&D and Ringo	10	Restaurants, cafes, shops, service station, hairdressers, pubs, religious building, health care facility, hotels, courts
Garrick	MSCP	404 approx	8:00hrs - 22:00hrs	P&D and Ringo	8	Restaurants, shops, cinema, art gallery, hairdressers, pubs, religious building, education facility
Merton Meadow	Surface	763 - reduced to 190	8:00hrs - 22:00hrs	P&D and Ringo	6	Restaurants, cafes, shops, care hire, hairdressers, sports facility
West Street	Surface	73	8:00hrs - 22:00hrs	P&D and Ringo	12	Restaurants, cafes, shops, art gallery, offices, bank, religious building, education facility, hotels, courts, job centre, museum
Greyfriars	Surface	10 approx	8:00hrs - 22:00hrs	P&D and Ringo	11	Restaurants, cafes, shops, offices, pubs, religious building, health care facility, hotels, job centre, nature area, sports facility
St Martins 1	Surface	133	8:00hrs - 22:00hrs	P&D and Ringo	7	Restaurants, shops, pubs, education facility, nature area, river house, sports facility
St Martins 2 - overflow	Surface	59	8:00hrs - 22:00hrs	P&D and Ringo	6	Shops, pubs, education facility, health care facility, social club, sports facility
Wye Street	Surface	69	8:00hrs - 18:00hrs	P&D and Ringo	7	Restaurants, cafes, shops, pubs, education facility, nature area, river house
Station Approach	Surface	189 (approx)	8:00hrs - 22:00hrs	P&D and Ringo	6	Restaurants, shops, service station, offices, education facility, train station
East Street 2	Surface	9	24/7	Permit holders only	10	Restaurants, cafes, shops, pubs, religious building, education facility, health care facility, hotels, courts, register office

Town Hall	Surface	45	8:00hrs - 22:00hrs	P&D and Ringo	10	Restaurants, cafes, shops, pubs, religious building, education facility, health care facility, hotels, courts, register office
East Street 1	Surface	47	24/7	Permit holders only	10	Restaurants, cafes, shops, pubs, religious building, education facility, health care facility, hotels, courts, register office

4.4.2

Car park name	Rating of car park to main attraction	How effective is the signage	Exit & entry (vehicle)	Exit & entry (pedestrian)	Ease of using internal signage	Ease of vehicle movement in CP	Ease of pedestrian movement in CP
Bath Street	4	3	4	4	5	5	4
Goal Street	5	4	5	5	5	5	4
Friars Street	3	3	4	4	4	4	3
Venns Close	3	4	5	4	5	5	4
Maylord Orchard	5	5	5	5	5	5	3
Shire Hall	5	2	4	4	3	3	4
County Offices	4	3	4	4	4	3	3
Nelson Street	3	1	4	4	5	5	5
Bus station	5	5	5	5	5	4	4
Union Walk	5	4	4	4	5	4	4
Garrick	5	5	5	5	4	5	5
Merton Meadow	4	5	5	4	4	4	4
West Street	4	5	5	4	5	5	4
Greyfriars	3	4	5	4	5	4	4
St Martins 1	5	3	5	4	5	5	4
St Martins 2	4	3	4	5	5	5	5
Wye Street	5	4	4	4	5	5	4
Station Approach	5	5	4	5	5	5	4
East Street 2	4	3	4	4	3	5	5
Town Hall	5	5	5	4	5	5	4
East Street 1	4	3	4	4	3	4	4

4.4.3

Car park name	Rating of disabled facilities	Rating of parent & toddler facilities	External appearance rating	Internal appearance rating	How secure does CP look	Is parkmark awarded	Tariffs compared to local tariffs?
Bath Street	4	Non	5	4	4	No	5
Goal Street	4	Non	4	5	4	No	5
Friars Street	3	Non	4	3	4	No	5
Venns Close	4	Non	5	5	4	No	5
Maylord Orchard	5	Non	4	4	4	No	5
Shire Hall	3	Non	4	3	4	No	5
County Offices	3	Non	5	4	3	No	5
Nelson Street	1	Non	3	3	4	No	Permit holders
Bus station	5	Non	5	5	4	No	5
Union Walk	4	Non	4	4	4	No	5
Garrick	4	5	5	5	4	No	5
Merton Meadow	2	Non	4	3	3	No	5
West Street	3	Non	5	5	4	No	5
Greyfriars	3	Non	4	3	3	No	5
St Martins 1	5	Non	5	5	4	No	5
St Martins 2 - overflow	4	Non	4	5	4	No	5
Wye Street	3	Non	3	4	4	No	5
Station Approach	4	Non	5	4	4	No	5
East Street 2	3	Non	5	5	5	No	Permit holders
Town Hall	4	Non	5	5	4	No	5
East Street 1	Non	Non	4	3	4	No	Permit holders

4.5 The results are interesting and encouraging for the Council. Overall the car parks are assessed as average to very good in important areas such as:

- Access to customer attractions.
- Internal signage, exits and entries, vehicle and pedestrian flow and internal and external appearance which are all at a consistently good standard.

4.6 However, there are two areas where the offering might be seen as less positive and there may be potential areas for development which could increase the sites attractiveness to the customer. This may be of especial interest in view of the high level of competition from private car parks.

- The security rating is somewhat lower than the assessment of most other categories; customers are showing signs of being increasingly conscious of security and this may impact the appeal of the Council car parks. We note that none of the car parks have the BPA ParkMark award for security. This can be an expensive option and, as far as we are aware, there is no evidence that the public is that aware of its significance or, therefore, sees it as an additional attraction but usage of its standards may increase the perceived security levels at the sites.
- The disabled facilities receive the lowest overall rating and only one car park has parent and toddler facilities. These special facilities are increasingly common in car parks and can influence usage by these specific customer areas. We would recommend that the Council considers extending the offer in these areas and, possibly, publicising their efforts to increase usage. Such moves can be popular with local retail sites who perceive it as encouraging footfall for their businesses. In addition, it offers appropriate competition to the private car parks.

5. Focus Group Review

5.1 Alpha Parking facilitated a Focus Group meeting where representatives were invited from various organisations to represent Hereford car park stakeholders and customers. The organisations included:-

- Maylord Orchard Car Park
- Old Market
- Hereford BID
- Halo Leisure Centre

NHS Hospital accepted the invitation but were unable to attend

At the beginning of the meeting the representatives completed a questionnaire assessing their perception of parking within Hereford.

The representatives were then shared and discussed as a group in more detail their issues, concerns, desires and suggestions based on the questionnaire structure.

At the end of the meeting the representatives completed the same questionnaire to asses their views of parking within Hereford and see if any changes had occurred as a result of the discussions.

5.2 Key Outcomes from Assessment Questionnaires

- Current Hereford car parking situation:

Response	Before the Focus Group Meeting	After the Focus Group Meeting
Very Good	0%	0%
Good	0%	0%

Average	40%	20%
Poor	60%	80%
Very Poor	0%	0%

5.3 These results suggest the overall Hereford car park can be improved

- Traffic flow perceptions

Response	Before the Focus Group Meeting	After the Focus Group Meeting
Very Good	0%	0%
Good	0%	0%
Average	40%	20%
Poor	60%	80%
Very Poor	0%	0%

5.4 This question relates to traffic flow within Hereford which can influence decisions on car park management

- The most important car park users were assessed as (with most important first and then in declining order of importance)

Factor	Position Before the Focus Group Meeting Score	Position After the Focus Group Meeting Score
Focused Customers	1	1
Local Visitors	2	2
Tourists	3	3
Our Staff	4	4
Residents	5	5
Other local workers	6	6
Commuters	7	6
Other	8	7

- The most important factors for a car park in order of importance (1 being most important)

Factor	Position Before the Focus Group Meeting Score	Position After the Focus Group Meeting Score
Close to destination	1	1
Easy to find a space	2+	2
Safety of car park	2+	3
Lowest tariff	4	4
Flexibility of payment method	5	5
Special features; e.g. disabled, family etc)	6	6

5.5 It is interesting that this reponse reflects the situation we often find where the level of the tarrif is not perceived as the most important factor in chosing to use a car park. As here, accessibility to the destination and ease of finding a space are both frequently considered to be more important.

In view of the results previously noted relating to the car park safety it is interesting that this is also considered to be a more important element than the tariff level.

- The long/short stay balance

Response	Before the Focus Group Meeting	After the Focus Group Meeting
Very Good	0%	0%
Good	0%	0%
Average	80%	60%
Poor	20%	40%
Very Poor	0%	0%

- The most important areas for improvement in the car parks

Area	Position Before the Focus Group Meeting Score	After the Focus Group Meeting Score
Introduction of more flexible payment methods	1	6+
More season ticket and permit availibility	2	4+
More attractive environment	3	1
Improved signage	4	2+
Changed split in LS/SS allocation	5	2+
Change in geographical location of Long and short term spaces	6+	4+
Increase in cashless payment option	6+	7
Extension of special features; e.g disabled, family parking etc	8	9
Increased enforcement	9	8

5.6 The change in the most assessment at the top end of possible changes was very marked between the beginning and end of the meeting.

At the beginning, an introduction of more flexible payment methods was the most required but the discussion gave more priority to the car park environment, improved signage and the long term/short term split.

- The issue of which car parks are most important, for the town, for the representatives' organisation and in need of improvement resulted in no clear concensus in any category.

6. Occupancy Survey of Car Parks

6.1 APPROACH

The occupancy counts were carried out at intervals of:-

Weekdays

1 hour	8am-7pm	all Hereford car parks
		all Ledbury car parks
		all Leominster car parks
		all Ross-on-Wye car parks

Saturday

1 hour	10am-5pm	Gaol Street
		Garrick
		West Street
		Merton Meadow
		Town Hall
		County Offices

6.2 DEMAND GROWTH

There are a number of factors which will place increasing demands on the car parks:-

- Population growth
- Increased housing stock,
- Increasing Car ownership
- Increasing centralisation of services/facilities as local services such as village shops close

6.2.1 For our forecasting we have used the The Department of Transport's Trip End Model Presentation Program or TEMPRO.

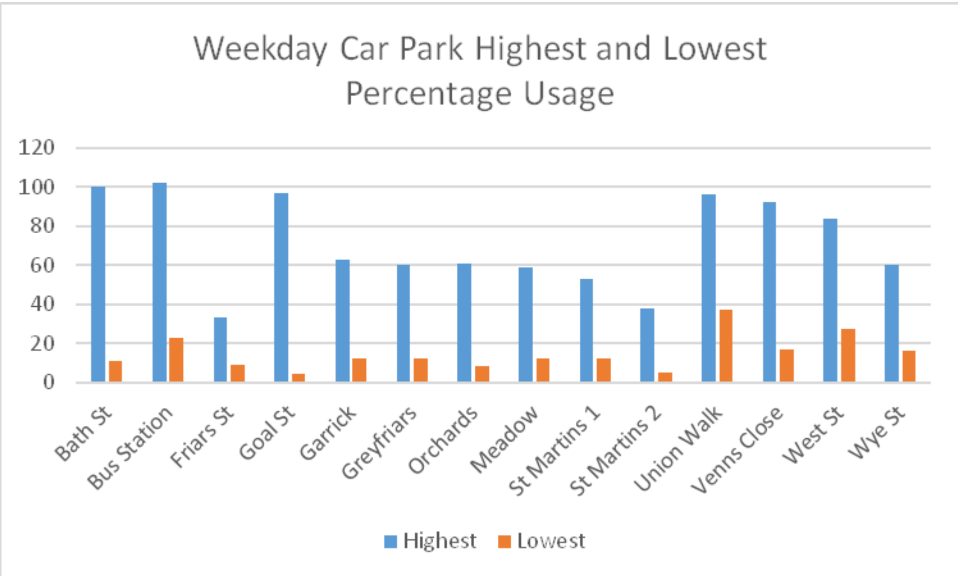
The factors which have been considered in the analysis are:-

Geographical area	essentially as detailed as individual towns – destinations of Hereford, Ledbury, Leominster and Ross-on-Wye have been separately analysed
Mode of travel	Car driver is the selection for car park analysis
Year to Year comparison	in all cases 2015 has been used as the base year with separate reports for growth as far as 2018, 2020, 2025 and 2035

It has been assumed that growth will apply equally across car parks and across tariffs

6.3 Survey Findings

Weekday Results



The graph above shows in percentage terms for Hereford the weekday highest and lowest usage by car park.

One of the noticeable factors is that while individual car parks do reach high usage levels there is a considerable amount of spare capacity in other car parks.

6.3.1 This is highlighted clearly in the following table:

Car Park	Spaces	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00
Bath Street	76	14.47	67.11	93.42	100.00	96.05	93.42	85.53	84.21	81.58	60.53	21.05
Bus Station	99	31.31	81.82	102.02	102.02	101.01	101.01	102.02	94.95	88.89	53.54	43.43
Friars Street	55	9.09	18.18	29.09	32.73	25.45	32.73	29.09	21.82	10.91	9.09	10.91
Gaol Street	130	3.85	35.38	66.92	96.92	72.31	59.23	71.54	68.46	53.85	22.31	10.00
Garrick	399	18.55	41.10	52.63	62.91	65.91	65.16	60.90	50.63	45.36	30.83	12.28
Greyfriars	69	11.59	40.58	52.17	49.28	50.72	57.97	52.17	56.52	59.42	44.93	18.84
Maylord Orchards	213	1.41	12.68	38.97	50.70	61.03	52.58	37.09	30.52	18.31	8.45	0.94
Merton Meadow	763	15.60		48.49		58.85		56.23		40.63		12.58
St Martins 1	134	11.94	15.67	41.79	33.58	52.99	41.04	24.63	19.40	38.06	67.16	47.01
St Martins 2	61	11.48	26.23	36.07	34.43	37.70	31.15	34.43	29.51	31.15	19.67	4.92
Union Walk	27	37.04	96.30	96.30	88.89	88.89	96.30	92.59	96.30	77.78	62.96	44.44
Venns Close	75	17.33	49.33	74.67	82.67	92.00	81.33	80.00	74.67	60.00	46.67	17.33
West Street	73	4.11	24.66	58.90	76.71	83.56	68.49	80.82	72.60	58.90	41.10	27.40
Wye Street	79	12.66	27.85	39.24	55.70	59.49	55.70	46.84	45.57	39.24	30.38	15.19

6.3.2 The table above shows the occupancy percentages per car park with the colours indicating:

- Red = full capacity has been reached
- Yellow = capacity is close to full
- Blue = highest capacity for that car park
- Green = lowest capacity in each car park

6.3.3 This more detailed table indicates that:

- Even when full capacity is reached in the main car parks there is considerable availability elsewhere
- Lowest occupancy is before 9.00am and after 5pm.

6.3.4 Other towns have noticed the same profile and have employed a range of initiatives to encourage parking earlier and later in the day in all or some car parks. This can be of considerable assistance to the retail outlets and businesses in to the area and, especially given the excess capacity, Herefordshire County Council may wish to consider similar offers By their nature it is not possible to forecast levels of increased income from such offers but, given the capacity available, we would recommend trialling a chosen option and assessing its impact over a 3, 6 and 12 month period.

6.3.5 Examples are:

- Newcastle offers an "Alive after Five" option where parking is free after 17.00
- Ipswich uses a "Quids in" offer where parking is £1 after 15.00 and an "Early Bird Offer" were all day parking is £3.40 if you arrive before 8am
- Chester provides "Free after three", any car parking for more than 3 hours is not charged for the additional time.

The table shows that the Bus Station, Station Approach and Union Walk are considered to be 'stressed' in that they have an occupancy level above 95% for an extended period of the day. There is a description of 'Stressed' or maximum comfortable usage level later in the report

6.3.6 There are two other car parks which have isolated readings above the 95% level, which are also untypical of the remainder of the day.

6.3.7 There are no growth factors from TEMPRO which suggest any cause for concern about the capacity of the car parks in the coming 20 years, though consideration may need to be given to some additional management in perhaps 10 years time.

6.3.8 In Ledbury there are no capacity issues foreseen for at least 20 years

6.3.9 In Leomister there are no capacity issues foreseen for at least 20 years

6.3.10 In Ross-on-Wye there are no significant capacity issues foreseen for at least 20 years. One car park, Kings Acre Lower, is technically stressed and forecasts suggest it will very marginally exceed capacity by 2025 but it is very likely that that extra demand will shift to another car park before that time, as it will do in 2035.

6.4 Saturdays

The Saturday surveys indicated no significant capacity issues with Garrick in particular hardly half full even at the busiest time.

Our forecasts via TEMPRO show that the capacity is unlikely to be exceeded for at least 20 years. One car park, West Street, is technically stressed and forecasts suggest it will very marginally exceed capacity by 2035 but it is very likely that that extra demand will shift to another car park before that time.

6.5 Projected Results

As a base figure we have used for the 2015 figures the surveys carried as part of this report's data gathering. We have projected further years are based on these figures with factors from TEMPRO utilised to give a forecast.

As has been mentioned and dealt with in more detail later, an occupancy level of 95% is considered a useful guideline for when a car park is becoming operationally stressed.

Our conclusions are discussed below.

6.5.1 Parking Stock

For the first half of 2016 Merton Meadow will be reduced to 190 spaces whilst a road construction project is carried out. On the basis of the surveys there will still be around 470 spare spaces available in council operated car parks in Hereford.

Merton Meadow will return to 450 spaced after the road works giving a spare capacity of around 730 spaces.

Though the timescale is not certain at this time it is expected that Merton Meadow will close completely in around 2 years time. This would leave a spare capacity of 280 spaces. In this short timescale natural growth will make a difference of perhaps 10 spaces.

As such there is no need for additional capacity to be built or acquired.

Our forecasts indicate that if the Council wished to re-organise its parking estate there is the capacity to spare such that further spaces can be taken out of the estate whilst this happens.

However, it should be borne in mind that the surveys were carried out in spring and, as such, do not represent what might be considered the peak pre-Christmas period. We do note that Herefordshire's own surveys indicate that demand increases by around 300 during the Christams period, theoretically utilising all the council's capacity. However, they also show that there is significant capacity in the non-council car parks (nearly 200 in the Old Market alone). The public will naturally find (or be directed to) alternative available spaces so there should still be no need to expand the parking estate.

6.5.2 *Forecast Capacity Levels*

The preparation of forecast car park capacity is not an exact science, but is dependent upon several factors outside the control or knowledge of the forecaster. The following assumptions have been made:-

the current demand is being satisfied

ie there is no suppressed, deterred or diverted demand – this is unlikely to be the case but without extensive surveying and detailed statistical analysis this cannot begin to be determined

that forecast trip end growth factors are correct – these are central government figures which cannot take account of changing circumstances during the period for which they were designed to be used – eg the recent reduction in fuel costs can be expected to bring overall motoring costs down, encouraging purchase and use of more vehicles, or additional use of existing vehicles, some of which will end up in Hereford or the market towns

Forecasts can also be changed by matters such as updated/additional shopping, leisure, industrial or residential facilities.

7. Benchmarking

7.1 Below is a summary and simplification of the Benchmarking data.

	Times of Charging
Hereford	The Council car parks charge between 8am until 10pm 7 days a week There are also eleven privately operated chargeable car parks, all 24 hours. There are also two free car parksand three season ticket only
Abergavenny	The Council car parks charge from 9am until 5pm Sundays are free
Cheltenham	The Council car parks charge between either 8am to 6pm or 8am to 8pm Sundays start at 10am There is one exception for a morning only car park
Ludlow	The Council car parks charge between 8am and 6pm, 7 days a week
Shrewsbury	The Council car parks charge between 8am and 6pm, 7 days a week
Worcester	The Council car parks charge between 7am and 9pm, 7 days a week There are three private car parks operating on an all day or

	permit basis
Tewkesbury	The Council car parks charge between 8am and 5.30pm, 7 days a week
Monmouth	The Council car parks charge between 8am and 5.30pm, 6 days a week Two are free throughout the week Sundays are free, There are three private car parks operating on an all day or permit basis
Chepstow	The Council car parks charge between 9am and 5pm, 6 days a week Two are free throughout the week Sundays are free, There is one private car parks operating on an all day There are three private car parks operating on an all day or permit basis basis

	Tariff Durations
Hereford	Weekday and Saturday car parks operations are generally - upto 4 hours - £1.10 per hour - over 4 hours - £1.00, £1.70, £2.70, £3.70 and £4.70 for over 4 hours

	Sundays are generally 2+ hours at £1.00. £1.50, £2.00 though there are a small number of minor variations Quarterly and Annual season tickets are available at the majority of car parks There is a private car park starting at £1.20/hr upto 4 hours before an increasing scale applies
Abergavenny	All car parks are available at at rate of 80p for 2 hrs £1.30 for 3 hrs £1.80 for 4 hours 3 of the car parks also allow 4+ hr for £2.80 Sundays are free of charge
Cheltenham	Car Parks have essentially all-day tariffs with the exception of 2 which have a four hour limit There are a wide variety of tariffs 1 hr is typically around £1.40/1.50 with some at 20-70p 2 hr is typically around £2.00-2.60 with some at 40-90p 3 hr has a number of £3.60-4.30 with some as low as 80p 4 hr is in the range of £4.00-5.00 with just one at 80p 4+ hr ranges widely from £4.00 to £14.00 Sunday charges are identical to the rest of the week
Ludlow	There is one 2 hr limited car park at 40p and £1.00 Three 4hr limited car parks – two are 50p, £1.10 and then £2.40 for 2-4 hrs

	- the other 40p, 50p then £1.10 for 2-4 hrs Sunday prices are roughly half of those above
Shrewsbury	There is a wide variety of stays - 3 are of 2 hrs at £1.50 and £3.10 - 5 are targeted at 3 hrs at £1.20 (1 hr) and £2.70 (2-3 hr) - with one around 2/3rds of the others - 3 of the above do have an all day tariff which are not prohibitive - there are then 4 and 6 hr stays at comparable but differently profiled tariffs
Worcester	Upto 4 hrs are all based on hourly rates of 60p, 90p, £1.20 6 hr, 1 day, 2 day and 3 day - £6 day is the general impression based on 4 tariffs There are three private car parks for all day (around £7.00 and season ticket users (£93.80 pm)
Tewkesbury	All bar 1 tariff are identical - 1 hr £1.00, - 3 hr £2.00, - 4+ hr £4.00 The odd one out is £1.00 all day
Monmouth	All car parks are - 2 hr 80p, - 3 hr £1.30, - 4 hr £1.80 Sundays are free Two car parks are free throughout the week There are three private car parks for all day (around £7.00 and season ticket users (£63.80 pm)
Chepstow	Three car parks are

	- 2 hr 80p, - 3 hr £1.30, - 4 hr £1.80 A fourth is similar but 20p higher Sundays are free Two car parks are free throughout the week There is one all day private car park charging £3.80

7.1.1 *Times of Operation*

Hereford's hours of operation are the longest in this group (apart from Worcester which is the same). They are already an extended day and evening, 7 days per week.

The only authority with operational times beyond those of Hereford is Worcester who start at 7am, instead of 8am

An extension to this time is unlikely to result in any change in behaviour or income as those arriving by this time are generally those staying for many hours and as such paying the all day rate

7.1.2 *Method of Payment*

All benchmarked authorities use P&D in the majority of their car parks.

Both Cambridge and Norwich use Pay on Foot systems in their MSCPs with between 280 and 1084 spaces

Bury St Edmunds are the only one of the benchmarked authorities who use a pay by phone system.

7.1.3 *Restrictions on Length of Stay*

There are no consistent maximum lengths of stay or durations within particular councils, never mind across them. This is however the epitomy of car parks being designed for the specific needs of their users and the organisation who serve them.

Hereford use hourly increases in tariffs in most cases, certainly up to 4 hours. Others, smaller towns appear to have a number of multiple hour divisions eg 0-2 hours or 1-3 hours period

7.1.4 *Tariffs*

The comparators can generally be divided into towns similar in size to Hereford, eg Shrewsbury, Cheltenham and Worcester which are more distant the distinctly smaller towns but which are closer.

Of the similar size towns 4 hr tariffs are around

£4 or lower in Hereford.
£4 or higher in Cheltenham
£4 in Shrewsbury, though most are limited to 3 hours which would be compatible
£2.40/3.60/6.00 in roughly equal quantities in Worcester

From this it can be seen that Hereford is perhaps slightly cheaper but by no means out of line with the others. Worcester is the most likely to have an overlapping catchment area with Hereford and this is where there is a choice of parking tariffs.

There is a little room to increase charges and perhaps go slightly higher, which would be unlikely to be detrimental to the retail competitiveness as any differences are likely to be insignificant in a persons choice of destination.

In terms of the more local but smaller towns, 4 hr rates are around 1/2 of the larger towns but several could be more convenient for those less ‘special’ purchases or activities. It is more about the choice and variety of shops, entertainment and recreational facilities which marks out Hereford from these towns, makes parking more of a supply issue, thus justifying the higher charges

The Market Towns have been compared with towns such as Abergavenny, Ludlow, Tewkesbury, Monmouth and Chepstow.

Apart from Tewkesbury, which operates at £4.00 for 4 hours, the typical tariff level is £1.80 for 4 hours, slightly less than the typical Herefordshire cost.

8. Measures for Influencing Change

8.1 DIRECTION SIGNAGE TO CAR PARKS

There were comments in the focus group about motorists not being able to find the car parks or find the one most relevant to their needs. Improving direction signage would meet this need

The potential range of signing methods is wide, including

- simple 'P' direction indicators

- 'P' direction indicators with additional information such as:-
  - The name of the car park
  - The size of the car park
  - The length of stay of the car park
  - The destinations served – eg
    - historic building (cathedral),
    - entertainment (cinema), or
    - shopping centre (Maylord, Town Centre)

- A larger 'P' sign showing multiple car parks

- Variable Message Signing which also shows the number of spaces available at any specific time in the nearest car parks. This can be a powerful tool in redirecting vehicles to sites with available capacity. This is not considered necessary in the case of Hereford as there appears to be spare capacity and only one or two might be full.

In all cases there should be follow up signs to keep the motorist going in the right and best direction

8.2 MEANS OF PAYMENT

Pay & Display is the standard form of payment which motorists have been familiar with for probably 30 or more years. It involves motorists paying coins (or more recently cards) in exchange for a timed ticket which they display in their windscreen as proof to the parking officer that payment has been made, is for the right car park and has not expired.

It is familiar, cheap, easy to operate but does not provide change or the ability to use notes, which with rising tariffs becomes increasingly necessary. However, it does:

- need the motorist to decide in advance how much time they will need or to overpay and not use all the time purchased.
- require a level of enforcement to ensure that motorists do pay
- mean that the motorist has the appropriate cash to use the machine (assuming cards are not being used)

8.2.1 *Pay on Foot* is well established and is suitable for larger car parks with long access ways. It is more expensive per machine but fewer machines are needed along with barriers at the entrance and exit.

It involves motorists taking a timed entrance ticket which when leaving is presented to the payment machine which calculates the payment due. According to the machine specification this can be by coin, note or card and change can be given.

The motorist can stay for as long as they wish (subject to any maximum stay restrictions) and only pay for the tariff band they used. There is no need for pre-deciding the length of stay.

This system is almost self-enforcing as a vehicle cannot leave until payment has been made. Enforcement is thus reduced to yellow lines, disabled bays or poor parking for instance.

8.2.2 *Pay by Phone* (Web, App etc) is now well established and in widespread use.

It involves motorists telephoning, texting, using the internet, a smart phone app or pre-paid accounts to pay for time at a car park. The car park has a location code and having registered the system knows the primary vehicle related to a telephone number which the system recognises.

The motorist (or the Council) pay a service charge and can pay for a text reminder of when their time is about to expire. Again subject to maximum stay restrictions, time can be extended by further contact. There is no need for pre-deciding the length of stay.

Parking officers check that a current payment is valid by comparing the VRM with a 'white list' of paid for vehicles which updates in real time.

If the motorist pays the service charge this is cheaper than Pay and Display. However if the Council pays the service charge it is only cheaper in smaller car parks.

8.2.3 *ANPR Pay by Plate* is relatively new and is in limited use. It is a less mature system.

The Vehicle Registration Mark is recorded by Automatic Number Plate Recognition technology on entry and exit. The motorist can either pay immediately before leaving or can pay later using the internet or other systems made available

The motorist can stay for as long as they wish (subject to any maximum stay restrictions) and only pay for the tariff band they used. There is no need for pre-deciding the length of stay.

If no payment has been made within a defined period the vehicle details can be obtained from the DVLA for payment (and a surcharge) to be pursued by post.

This enforcement after the event is more difficult and though not needing parking officers, needs a back office team to process the cases.

In our view this is not yet sufficiently accurate and consistent though it is quickly improving

8.3 SUGGESTED ACTIONS

Merton Meadow

This car park will shortly be reduced from 763 spaces to 190.

There are a large number of vehicles at this car park who stay all day. This is in fact the only tariff available but the surveys do enable us to say that over 200 do actually stay for long periods.

If no action is taken it could result in a great deal of traffic in the area attempting and failing to park here, thus increasing the traffic flows and congestion of circulating vehicles in the area.

It is suggested that this car park be made season ticket holder only. This will ensure that all day parkers can still find a space on a reliable basis and traffic moverments are minimised in the area

As has been noted, there is sufficient capacity for the other slightly shorter stay parkers to then distribute themselves amongst other car parks.

There may still be a number of people who will still wish to park all day and they can either use the daily facility at other car parks, or season tickets may increase at these car parks. It is suggested that for each car park a limit be placed on the number of season tickets that can be issued.

This will prevent any transference focussing on one car park.

In order to protect those that are buying such season tickets from any fluctuations in demand it is also suggested that a number of spaces in each car be set aside as season ticket holders only.

The balance of season ticket holders only spaces and limits on number of season tickets may need to be a fluid matter, especially at the point where Merton Meadow closes.

However based on the occupancy surveys a suggestion is made in the recommendations for the maximum number of permits at each car park.

In order to try and spread the demand between the car praks it is also suggested that the season ticket prices are standardised as much as possible

8.3.1 Tariffs

As has been said above, there is a reasonably close match between prices in Hereford, Cheltenham and Worcester.

It is felt that there is some scope for an increase in charges without damaging the competitiveness of the City as a centre for retail, entertainment, tourism and other activities.

There is no particular need in terms of management of the supply/demand equation for extensive changes. This may be different in the Christmas "pinch-point" of November/December but in a 'normal' period there is more than adequate capacity.

Following the return of Merton Meadow to 450 spaces it is estimated that the measures in this report will result in a revenue increase of around £323,000pa.

The more extreme circumstances of Merton Meadow only having 190 spaces, are somewhat more difficult to predict in terms of how motorists will re-distribute themselves. Given the nature of Herefordshire it is expected that journey numbers will reduce only slightly. However available parking is of a more expensive nature so the revenue may not be affected overall.'

It is likely that there will be some expression of opposition as the charge for a stay of 4 hours will increase by perhaps 50%, from the low base figure. A person working a half day every day could buy a season ticket for one of the other car parks and pay no more than the currently do on a daily basis.

8.4 PENALTY CHARGE NOTICE ISSUE RATES

The issue if PCNs is the means by which the Council provides a disincentive to motorists inclined to ignore or disregard the regulations for usage of the car parks. They are issued for matters such as:-

- Failure to display a parking ticket or permit
- Display of an expired parking ticket or permit
- Incorrectly parked in a Blue Badge bay, on double yellow lines or outside the bay markings

The level of PCN issue and income therefrom is shown in the "Income per space" table.

This report does not include a survey of contraventions and so no comment is made on the level or distribution of PCNs or the patrols that generate them

8.4.1 Charging Options

It is to be born in mind that an increase in income does not always come from an increase in tariffs.

Motorists can always decide to use alternative cheaper car parks or to go somewhere else entirely. Thus a lower activity can diminish or even outweigh the effects of the higher charges. This might be a desirable outcome if the objective is to reduce over-crowding, congestion and dissatisfaction with the service.

The converse is also true in that reduced charges can stimulate extra usage of a car park which outweighs the lower income per vehicle. This might also be a win for local traders whose footfall and custom is improved.

Charges can also be varied according to the type of user. Reductions might apply to the disabled, those using low emission vehicles or particular interest groups, eg cathedral visitors

8.4.2 *Incentives*

These can be used to ‘control’ or ‘direct’ how motorists use the car park. There are various ways of encouraging a temporal spread of activity at entrances, exits and within the car park.

These might be to reduce the charge for people arriving before the morning rush hour, eg an ‘early bird’ before 8am or those leaving after the evening rush hour, eg a late stayer after 7pm. Along the same theme a rush hour premium might be charged for entry between 8 and 9.30 or departure between 4.30 and 6. An early bird or morning rush hour premium can be provided using P&D or Pay by Phone, but a late stayer or evening rush hour premium would need PoF/ANPR.

8.4.3 *Special Bays*

Everyone is familiar with bays reserved for the disabled with a Blue Badge which is easy to identify.

Parent and Child bays are more specialised in that they are usually identified with large attractions such as supermarkets. They are more difficult to operate successfully as there is no definitive way of controlling their use or providing evidence of a contravention and as such can be abused. However, they are popular with family groups and are becoming more widely seen in car parks

8.4.4 *Ideal Occupancy levels for a Car Park*

It might seem that the ideal would be for a car park to be entirely full. However, this does have its problems, especially in car parks where access is unlimited such as P&D car parks. These issues include:-

Vehicles circulating the car park trying to find a vacant space. This is especially detrimental where several vehicles are circulating, perhaps getting in each other's way.

Vehicles try to exit who get caught up in the circulating traffic. Exiting vehicles cannot get past waiting vehicles and a queue forms of mixed traffic.

A queue also forms at the entrance, conflicting with already circulating vehicles.

In short, vehicle flow is compromised and eventually there is gridlock.

Long established wisdom is that a car park where occupancy is around 95% is going to run more efficiently and turnover of spaces is considerably improved, thus achieving more parking acts, more revenue and more satisfaction, leading to repeat visits in the future.

Barrier controlled car parks can have vehicle counters on the in and out barriers to establish the availability of space and therefore control entry and occupancy

For information, the corresponding figure for visitor parking on highways is 85% due to need to avoid holding up traffic trying to move through the street rather than stop in it.

8.4.5 *Vehicle Type*

Some types of vehicles can be given an advantage in terms of access, price or convenience. Or alternatively prevented from using certain car parks or spaces

For example really small vehicles can be allowed into spaces unsuitable for standard/large vehicles. They could also be given a price reduction.

Low emission vehicles can also be given price reductions and/or could be given the spaces nearest to an entrance where more pedestrians may pass or congregate, thus reducing the harmful effects on them of vehicles in general.

Coaches/Minibuses may be restricted to certain areas, or central drop off points provided before they park more remotely.

Larger vehicles have difficulty in fitting parking bays designed for vehicles 20 or 30 years ago. 4x4s are often presented as the ultimate excess, but executive or even modern standard cars are considerably larger than their predecessors and can have a larger footprint, even though they are not as tall. Perhaps there is a need for larger bays, but preventing smaller vehicles using them might be problematical.

8.4.6 *User Type*

There is an ever present question as to who is the customer of a car park or who should be the customer.

There are a number of categories people (and car parks) are put into:-

- Tourists – these are usually one-off visitors who probably know where they want to be but do not know where it is, where they are or how to get from one to the other. They need car parks close to their chosen attraction (so as to not get lost on foot), which are identified as being associated with that attraction and which have direction signing from their likely point of entry to the town.
- Regular visitors – these might be more local with perhaps relatives in the town or who come for a treat such as entertainment, restaurants, non-standard shops or as tourists for an hour or two. These people will know where they want to go but might not be over familiar with the town and may need signage to help/remind them of where they need to go.
- Shopper – these are generally people who know the town pretty well and know where they want to go, know how to get there, know the alternatives and will follow their preferences for which car park they want to use.
- Local Worker – these are people who are employed in the town, will have researched their car parking (or other travel) options and will know exactly how to get to where they wish to park, along with alternative routes and car parks.
- Commuter – these are workers who are employed outside the town and need to connect with another form of transport, usually a train, but occasionally coach or bus. They will know where they want to be, but may not have as many alternatives as the local worker

Direction of different types of users to particular car parks can be manipulated by means of time restrictions and tariffs to try and manage availability and efficiency of parking spaces in the places particular people need them.

8.4.7 *Alternative Transport Modes*

There are alternatives to each individual driving to their destination and sometimes parking operations can help to move people to other modes of transport or travel:-

- Car sharing is a means of reducing parking demand and pollution. It does however require sharing individuals to have very similar destinations, very similar travel times and a level of consistency to avoid the arrangement falling back into separate journeys.
- Park and Ride will enable vehicles to be parked in car parks with probably a large capacity and high availability of spaces. To be successful the service needs to be frequent, quick and reliable with enough drop off/pick up spots to be convenient for destinations without being slowed down by stopping too frequently.
- Public Transport buses will be unattractive without frequent services (perhaps half hourly and no more than hourly) that run early and late. (perhaps starting at 6am and finishing at 10pm or later). This is costly and without a sufficient potential customer base in a suitably dense population area is unlikely to be provided without at least an initial subsidy (seed money)
- Rail travel in Herefordshire is restricted in terms of access, though the number and varied direction of routes is good,

These will only be realistic if the persons experience of the City/Town is not diminished as a result, and given the nature of Herefordshire and its catchment area the car is going to remain king.

8.5 ***Data Examination***

In order to reach any conclusions on potential tariffs it is first necessary and extremely important to examine the data available. In this case information either provided or collected during the course of this review has included:-

Occupancy figures from the surveys carried out as part of this project

- this indicates if a car park is under stress and whether action is needed and demand needs to be reduced either by increased charges or additional constratints such as conversion to a short stay car park

Duration of stay from the surveys carried out as part of this project

- this will indicate if for instance long-stay users are crowding out the short stay users and need to be re-directed to another car park by means of introducing a maximum stay

Benchmarking of several cities and towns of a similar nature to Hereford and the Market Towns

- Cities/Towns are essentially in competition with each other to attract visitors and need to avoid deterring potential visitors/customers by parking charges which are too high compared with others. This might put a cap on the tariff levels, but at some point someone will need to lead the way to the next level to maintain the cost/income/benefit balance

Views and perceptions of a small focus group of key stakeholders.

- these can often point towards the key issues

Customer survey of car park users

- these can often point towards the key issues

Car Park transaction data from P&D machines and similar for PoF car parks

- these show the existing usage, according to length of stay and the consequent income. This forms the base for any forecast changes

Season Ticket sales

- this indicates the regularity of parking by individuals. It can indicate the number of employees based in the area

PCN issue figures

This data has been collated into forms which are much easier to understand, assimilate and manipulate into useful analyses

8.6 Method of Forecasting

The above data has been used to formulate suggestions for changes, based upon our own observations and suggestions provided by the Council.

These suggestions have been fed into a model which takes account of existing usage and income, current and 'future' tariffs, together with an estimate of how usage will alter in response to the changed tariffs or other restrictions.

This estimate of usage change is the most difficult and least objective part of the process, relying on experience and perception, yet can have an impact on the final estimates.

Reductions in usage have been based on 0, 5, 7.5 and 10% of the existing usage allocated according to various factors such as the degree of tariff change, the potential movement between car parks and forced factors such as redistribution of vehicles due to the significant reduction in size of the largest car park

This latter item has in the main been factored into season ticket changes.

PCN figures have not been altered as patrolling, compliance, effectiveness and efficiency are not part of this report.

The results of this forecasting are summarised in the tables on page 8

9. Tariff Recommendations

9.1 INTRODUCTION

Please note that all figures in this report include VAT both as this is the basis on which the customer sees the charges and to keep the figures on a consistent basis.

There are no capacity issues that would require an expansion of the parking stock. If consolidation or re-arrangement or refurbishment of car parks were contemplated there would be sufficient spare capacity to allow car parks to be closed whilst works are carried out

Merton Meadow

Because of site work this car park will shortly be reduced from 763 spaces to 190 but will then very quickly be increased back up to 450 bays.

There are a large number of vehicles at this car park who stay all or most of the day; our surveys enable us to say that over 200 stay for the longer periods.

It is suggested that this car park be made season ticket holder only for the short works duration. This will ensure that all day parkers (season ticket holders) can still find a space on a reliable basis and, by eliminating non-season ticket holders searching for spaces traffic movements are minimised in the area while works are in progress.

There is sufficient capacity for the non-season ticket holders to distribute themselves amongst other car parks which permit all day parking. They could do this either as a day parker or there is the potential for additional season tickets to be sold. It is suggested that a limit be placed on the number of season tickets that can be issued in each car park. This will help to prevent any transference focussing on one car park, though no such control can be placed on day parkers.

However, management of the more significant short term period has been excluded from our evaluation in order to avoid distortion.

9.2 SEASON TICKETS

There is a balance to be drawn in a car park between the demands of season ticket holders and the needs of the casual visitor.

As well, there is a need to ensure that season ticket holders are able to find a space and thus receive the service for which they have paid in advance

As such, it is suggested that each car park has a maximum number of season tickets in operation at any one time and that there is a number of spaces which are reserved for season ticket holders. The aim is for the season ticket holder bays to allow for a core level of season ticket holders to be reasonably confident of having spaces without taking up a disproportionate number or having other users frustrated because they cannot find a space while seeing unused season ticket bays.

It is usual to accept that the number of spaces can be lower than the number of season tickets as there will always be a proportion of people who are on holiday, away visiting customers/clients, working at home, sick or absent for some other reason. There is no formula for calculating a "used" percentage in any particular car park but, on average, it is acceptable to assess that perhaps 15%, or more, will not be using their space on any particular day and review this every 3-6 months to see if the percentage should be adjusted

The balance of season ticket holders only spaces and limits on number of season tickets may need to be a fluid matter and subject to the correct wording of the traffic order this may be varied easily by administrative means and simple re-painting or re-signing of the car park as season ticket usage trends are identified

Season ticket tariffs are currently varied according to their distance from the town centre and this demarcation should be retained to allow a cheaper alternative (particularly Merton Meadow) for those unable to use other means of transport, are on limited income, but who provide a potentially important contribution to the City.

We have suggested increases of around 6%, 15% and 30% for the low, medium and high tariff changes, which taking into account the likely number of days utilised represent daily tariffs of around £2.15 for Merton Meadow at the lowest tariff increase to £4.10 for the most expensive car parks at the highest tariff increase.

This still represents very good value for money compared with the daily tariffs.

Taken together with some variations in numbers purchased this may result in income increases of £40,000, £60,000 and £90,000 respectively.

Suggestions for Season Ticket Tariff Changes

Car Park	Suggested Maximum No of Season Tickets	Suggested Number of Reserved Spaces	Old Charge	New Charge - Low	New Charge - Medium	New Charge - High
Bath Street **Bus Station** **Garrick MS** **Greyfriars** **St Martins 1** **Union Walk** **Venns Close** **Wye Street**	0 40 150 0 55 In Bus St In Bath St 0	0 30 125 0 45 In Bus St In Bath St 0	12 mth - £705 3 mth - £180	12 mth - £750 3 mth - £200	12 mth - £800 3 mth - £225	12 mth - £900 3 mth - £250
Merton Meadow	300	250	12 mth - £450 3 mth - £125	12 mth - £475 3 mth - £130	12 mth - £525 3 mth - £140	12 mth - £600 3 mth - £160
Station Approach **St Martins 2**	80 25	65 20	12 mth - £600 3 mth - £160	12 mth - £650 3 mth - £175	12 mth - £700 3 mth - £190	12 mth - £750 3 mth - £200

Off Peak Rates				No change	No change	No change

9.3 GENERAL TARIFFS

As has been noted above, there is a reasonable correlation between prices in Hereford, Cheltenham, Shrewsbury and Worcester and this does provide a range for Herefordshire Council to review their tariffs and utilise sensibly the car park asset.

From our review we do not need to consider, when reviewing the tariff structure, using tariffs to move capacity between the car parks as a priority.

In considering the options we have looked at:

- an increase in charges to the level of Shrewsbury (the low level option)
- to the level of Cheltenham (the middle level option).
- a high level option which would make Hereford somewhat more expensive than all the equivalent towns or cities within the region. This raises the danger that the level of tariffs in Hereford will deter visitors and encourage usage of other centres. Having said that, unless parking charges were to remain static for considerable periods, someone has to take the lead and create the new benchmark.

9.4 We need to consider how a change in the tariff might affect to attractiveness of the city to various users of the car parks. It is worth bearing in mind that:-

- Commuters are relatively unlikely to change their parking habits given their need to travel and that the nearest stations are some distance away.
- Local Workers are also unlikely to change their habits significantly, though they may have some more flexibility in terms of which car park they use and in some cases which mode of travel they use.

- Shoppers are perhaps the largest group of parkers, yet have probably the largest set of options available to them. They could
  - shop less frequently – eg 3 trips a month instead of 4
  - use alternative transport modes – a form of informal park and ride,
  - use alternative council car parks – move to slightly cheaper but more distant facilities,
  - transfer to a private car park – even on the lowest tariff increase some of the council car parks become equal to the Old Market car park, which will make this a more attractive proposition, though they may also increase charges to improve their income or control the volume of the transfer if it is creating practical difficulties in their car park
  - use another centre.
  - regular visitors are those who might be visiting friends/relatives or using restaurant, exercise or entertainment facilities. They are unlikely to change their habits significantly due to the impact on their quality of life.
  - finally, tourists are generally one-off visitors and are unlikely to change or cancel their plans on the basis of parking fees.

Factors in personal choices for where to travel, shop etc will revolve, apart from the travel and journey end costs, around the availability and quality of their desired services. The relative attractiveness of the city and its offerings will govern the outcome of changes to parking fees. If others are otherwise seen as similar or more likely to meet their needs then transfer may become permanent.

There will be some reduction in the number of visitors, though some will return after a period as they realise that Hereford is still the best overall package for their needs. An additional 40p for 4 hours (or 9%) will essentially be seen as insignificant. As such, the low level is unlikely to affect the competitiveness of the City as a centre for retail, entertainment, tourism and other activities.

The medium level effect will be slightly larger and more people who are on the cusp of the catchment areas of neighbouring cities may make a more permanent shift. However an additional £1.20p for 4 hours (or 27%) may cause some reduction in the level of footfall in the city centre as visitors transfer to other cities or to private facilities.

The high level option however is an additional £2.00 for 4 hours (or 45%) which will be seen by many as significant and will potentially be detrimental to footfall and transfer of loyalty. There is the possibility of this being more permanent, with real effects on the economy of the city as a whole.

9.4.1 *On-Street relationship*

There is also the relationship between on and off-street charges to consider. It is good practice for the off-street charges to be lower than those on-street to encourage motorists to go to where a parking space is likely to be available rather than 'cruise' the highway at low speed, obstructing those who are actually trying to move into, around or through the city.

The proposed charges of £1.50 per hour on-street would only be marginally higher than the medium increase tariffs and lower than the high level increases. In both these cases the on-street charges should be reconsidered.

This should not affect the very low priced 30 minute stop and shop type tariff which should be prime form of marketing for this service.

9.4.2 *Outcome*

The results of the changes are estimated to increase income by £227,000, £696,000 and £1,032,000 for the low, medium and high proposals. There will of course also be the new income from on-street parking charges which are currently estimated at between £360,000 and £490,000

In conclusion, it is suggested that any changes to tariffs are restricted to the low or medium levels, and in the latter case an increase in the proposed on-street charges also be increased.

9.5 Suggestions for Tariff Changes

Car Parks	Current Tariff	Future Tariff - Low Level - Similar to Shrewsbury Weekdays - Higher on Sundays	Future Tariff - Medium Level - Similar to Cheltenham Weekdays - Lower on Sundays	Future Tariff – High Level - Higher than any of the Comparators
Gaol Street Shire Hall West Street	£1.10 per hour Max 4 hours Sunday 1 hr - £1.00 2 hr - £1.50 Over 2 hr - £2.00 No Maxiimum Stay	£1.20 per hour Max 4 hours Sunday 1 hr - £1.00 2 hr - £1.70 Over 2 hr - £2.50 No Maximum Stay	£1.40 per hour Max 4 hours Sunday 1 hr - £1.30 2 hr - £2.00 Over 2 hr - £3.00 No Maximum Stay	£1.60 per hour Max 4 hours Sunday 1 hr - £1.50 2 hr - £2.50 Over 2 hr - £3.25 No Maximum Stay
Bath Street Bus Station County Offices Garrick MSCP	1 hr - £1.00 2 hr - £1.70 3 hr - £2.70 4 hr - £3.70	1 hr - £1.20 2 hr - £2.20 3 hr - £3.30 4 hr - £4.40 Over 4 hr -	1 hr - £1.40 2 hr - £2.50 3 hr - £3.80 4 hr - £5.00 Over 4 hr -	1 hr - £1.60 2 hr - £3.00 3 hr - £4.50 4 hr - £6.00 Over 4 hr -

Greyfriars St Martins 1 Town Hall Union Walk Venns Close Wye Street	Over 4 hr - £4.70 No Maximum Stay Sunday 1 hr - £1.00 2 hr - £1.50 Over 2 hr - £2.00 No Maximum Stay	£6.00 No Maximum Stay Sunday 1 hr - £1.20 2 hr - £2.00 Over 2 hr - £2.50 No Maximum Stay	£6.50 No Maximum Stay Sunday 1 hr - £1.40 2 hr - £2.20 Over 2 hr - £3.00 No Maximum Stay	£7.00 No Maximum Stay Sunday 1 hr - £1.60 2 hr - £2.40 Over 2 hr - £3.50 No Maximum Stay
Friars Street	2 hr - £1.00 4 hr - £2.00 Over 4 hr - £3.00 No Maximum Stay Sunday 1 hr - £1.00 Over 2 hr - £2.00 No Maximum Stay	2 hr - £1.00 4 hr - £2.00 Over 4 hr - £4.00 No Maximum Stay Sunday 2 hr - £1.00 Over 2 hr - £2.00 No Maximum Stay	2 hr - £1.20 4 hr - £2.20 Over 4 hr - £4.50 No Maximum Stay Sunday 2 hr - £1.20 Over 2 hr - £2.50 No Maximum Stay	2 hr - £1.40 4 hr - £2.50 Over 4 hr - £5.00 No Maximum Stay Sunday 2 hr - £1.50 Over 2 hr - £3.00 No Maximum Stay

Merton Meadow	All Day - £2.00	All Day - £3.00	All Day - £4.00	All Day - £5.00
Maylord Orchard	Upto 4 hrs £1.20 per hour 5 hr - £6.50 6 hr – £8.80 Over 6 hr – £10.50 No Maximum Stay Sunday 1 hr - £1.00 2 hr - £1.50 4 hr - £2.00 6 hr - £4.00 Over 6 hr - £6.00 No Maximum Stay	Upto 4 hrs £1.30 per hour 5 hr - £7.50 6 hr – £10.00 Over 6 hr – £11.50 No Maximum Stay Sunday 1 hr - £1.00 2 hr - £2.00 4 hr - £2.50 6 hr - £4.50 Over 6 hr - £6.50 No Maximum Stay	Upto 4 hrs £1.50 per hour 5 hr - £8.00 6 hr – £11.00 Over 6 hr – £13.00 No Maximum Stay Sunday 1 hr - £1.20 2 hr - £2.40 4 hr - £3.50 6 hr - £5.50 Over 6 hr - £7.50 No Maximum Stay	Upto 4 hrs £1.70 per hour 5 hr - £7.50 6 hr – £12.00 Over 6 hr – £15.00 No Maximum Stay Sunday 1 hr - £1.40 2 hr - £2.80 4 hr - £4.50 6 hr - £7.00 Over 6 hr - £8.50 No Maximum Stay
St Martins 2	1 hr - £1.00 2 hr - £1.70 Over 2 hr - £3.00	1 hr - £1.00 2 hr - £2.00 Over 2 hr -	1 hr - £1.20 2 hr - £2.40 Over 2 hr -	1 hr - £1.40 2 hr - £3.00 Over 2 hr -

	No Maximum Stay Sunday 1 hr - £1.00 2 hr - £1.50 Over 2 hr - £2.00 No Maximum Stay	£3.00 No Maximum Stay Sunday 1 hr - £1.00 2 hr - £1.50 Over 2 hr - £2.00 No Maximum Stay	£4.00 No Maximum Stay Sunday 1 hr - £1.20 2 hr - £1.80 Over 2 hr - £2.50 No Maximum Stay	£5.00 No Maximum Stay Sunday 1 hr - £1.40 2 hr - £2.20 Over 2 hr - £3.00 No Maximum Stay
Station Approach	All Day - £3.00 Sunday All Day - £2.00	All Day - £4.00 Sunday All Day - £2.50	All Day - £5.00 Sunday All Day - £3.00	All Day - £6.00 Sunday All Day - £3.50

9.6 SUMMARY OF TARIFF RECOMMENDATIONS

Description	Low Estimate Change	Medium Estimate Change	High Estimate Change
1. Season ticket changes	£40,000	£60,000	£90,000
2. Tarriff changes	£227,000	£696,000	£1,032,000

3. Market towns estimate	£45,000	£45,000	£45,000
Estimated total	£312,000	£801,000	£1,167,000

10. Recommendations Summary

10.1 Capacity does not appear to be an issue in Herefordshire and we do not consider it necessary for any major steps to be taken in this area in the now or in the near future.

10.2 Greater use of season tickets should be considered in order to provide more flexible and cost effective usage of the car parking asset. We have recommended a range of options defined as “low”, “medium” and “high”.

10.3 In order to meet the duty to efficiently manage the Council’s assets consideration should be given to raising the tariffs in the Hereford car parks; again, we have recommended a range of options defined as “low”, “medium” and “high”.

10.4 Consideration should be given to the tariffs in the market towns; changes in Leominster should be seriously addressed and the smaller recommendations to bring the other market towns in line with comparable towns should be considered.

10.5 The Council should consider introducing an incentive scheme to encourage usage in the car parks at the earlier and later parts of the day.

10.6 Introduction of facilities such as disabled bays and parent and toddler bays will increase interest in using car parks. The Council may want to consider assessing whether some of the major retailers/businesses may be interested in “sponsoring” these bays in order to be seen to be supporting the community and their customers.

10.7 the management of the traffic flow via enforcement and the issuing of penalty charge notices may well be improved if signs and lines are checked and corrected in a timely fashion.