



Assessing the Impact of Car Parking Charges on Town Centre Footfall

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This work has been conducted in accordance with ISO 20252, the international standard for market and social research



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1. Executive summary

1.1 Background

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

1.2 Methodology

1.2.1 mruk undertook a literature review of existing evidence, a series of six in-depth interviews with Local Authorities, 16 in-depth interviews with business owners/ workers and 208 in-street interviews with town centre visitors in five key towns across Wales¹. More detailed information on the methodology can be found in Chapter 2.

1.3 Key findings and conclusions

- 1.3.1 Charging for car parking is a complex issue. It is only one aspect of a complex interplay of factors influencing willingness to travel by car, time and money spent, and business activity in town centres. It is very difficult to separate the influence of car parking charges from other factors.
- 1.3.2 Car park charging is often perceived, particularly amongst businesses, as being a key determinant for changes in footfall levels in town and city centres. Over three-quarters of the business owners / workers interviewed suggested that car parking options have an impact on the number of people coming into the town centre and therefore on their custom. However, the available evidence almost entirely anecdotal.
- 1.3.3 Beyond anecdote, there is very little published evidence which links changes in car park charges to changes in town centre footfall. Local Authorities and other stakeholders similarly rely mostly on anecdote when relating car park charges to footfall. However, their feedback does suggest that a relationship exists.
- 1.3.4 Visitors to town centres suggested that car park charges impact on how long they to remain in the centre and, consequently, how much they spend whilst there. However, the general availability of spaces is felt by visitors to be more important than cost in their overall decision about visiting. Traffic flow and parking signage are felt by visitors to have the same, if not greater, effect on their decision to visit the town centre, how long they spend there, and how much money they spend.
- 1.3.5 Out of town developments were unanimously cited as being at least partly responsible for having a detrimental impact on footfall and business trade in the town and city centres. The fact that most of these developments offer free parking was felt to give shoppers a reason to go to them over town or city centres.
- 1.3.6 Whilst a 'blanket' free parking strategy has been suggested to encourage more car park users, these were generally found not to benefit target visitors (for example, the spaces

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



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

- 1.3.7 Local Authorities often primarily use car park charges as a revenue stream, ignoring or de-emphasising the complex, nonlinear effects that they can have on town centre footfall. Some stress the importance of finding a compromise between generating sufficient parking revenue and keeping charges at a rate that will not alienate shoppers and drive them out of the town or city centre.
- 1.3.8 There are also three broad types of methodological conclusions that can be used to inform future research. Firstly, **there is a lack of robust evidence that can be used to link car parking strategies and town centre footfall**. Robust, numerical information based on recordings of footfall, business revenue, car park usage, and changes to car parking strategies is not available amongst the Local Authorities surveyed. Secondly, **charging for car parking is one of a complex array of factors that can influence town centre vitality**. Disentangling them through qualitative research and a small-scale survey is a challenge. Further research using larger sample sizes would be needed to build a stronger evidence base. Finally, **town centre economies are highly localised and are hyper-specific**. Towns are very different economically; different factors are at play across locations. Parking strategies will need to be tailored to local areas to maximise the impact on footfall.

1.4 Recommendations

- 1.4.1 **Car park charging should not be viewed in isolation from other factors (availability of parking, signage, traffic flow) which affect willingness to drive in town centres**. An overall systemic approach could be taken to future research which examines this complex interplay, rather than one aspect of it. Further quantitative research with visitors, potential visitors and businesses would allow for robust trade-off testing of potential parking packages. These could be modelled to determine the strategies most likely to improve footfall.
- 1.4.2 **Local Authorities should be encouraged to consider the impacts of car parking charges in the broadest possible sense, particularly if their primary goal in changing them is to generate revenue**. They should engage with key stakeholders involved in the local economy when changing their car park charges, for example business owners, shoppers, council members etc. This is key to ensuring the optimum charging strategies are adopted.
- 1.4.3 **Local Authorities should be encouraged to collect more robust data on the impact of car park charging in their areas**. This will help further planning around car park charging, both at the local and national level.
- 1.4.4 In developing solutions to encourage greater town centre footfall **the Welsh Government should work closely with Local Authorities and business groups to develop parking strategies that:**
- Take into account other key decision-making factors (e.g. availability of spaces, parking restrictions, car park security etc.)
 - Protect sustainable revenue income for councils
- 1.4.5 In addition, a one size fits all approach to parking strategy is unlikely to work across Wales. The Welsh Government will need to work with Local Authorities to **develop parking strategies that factor in local nuances** in town centre layout and retail offerings which differ between locations. For example, in some areas strategies will need to focus more on parking availability or cost, while in other areas it will be more important to focus on promoting the retail offer in town centres vs. the out-of-town offer.



2. Research background, objectives and methodology

2.1 Background and research objectives

- 2.1.1 Town centre vitality is a key issue across the UK. Its importance is acknowledged by governments across the UK. In 2011, the National Assembly for Wales' Enterprise and Business Committee's Inquiry into the Regeneration of Town Centres concluded that vibrant town centres are core to a healthy and prosperous Welsh economy². Similar conclusions were reached by the UK Government's 2011 report³ into the future of UK high streets. However, a number of factors make it difficult to maintain the vitality of some town centres, and to enable previously vibrant centres to regain their vitality.
- 2.1.2 Changes in the way that people shop are a key factor. Over the past 20 years, there has been a substantial increase in investment in out of town shopping centres. In 1993, the proportion of investment in out of town was less than a fifth of that in town centres; the value of property owned out of town has now overtaken that held in town centres⁴. In the decade to 2011 the amount of out-of-town retail floor space rose by 30% whilst that in-town fell by 14%. In addition, retail spending in town centres is falling, from 50% of total retail spending in 2000 to an estimated 40% in 2014⁵. A similar pressure comes from online shopping; this too has risen substantially in recent years, from just over 2% of all retailing in 2006, to over 10% in 2012⁶.
- 2.1.3 Furthermore, the economic downturn, and a rise in VAT to 20% in 2011, have added further pressures to household budgets, and so to consumer spending. The economic downturn has also resulted in pressure on Local Authorities (LAs); budget cuts have increased pressure on taxes, services and, crucially for this report, council revenue streams.
- 2.1.4 One such revenue stream is car parking charges. Other than in private car parks (e.g. NCP), LAs control the availability, duration and cost of car parking. They frequently have more control over parking than any other aspect of transport policy and management⁷. However, crucially, they are often not in control of the charging rates set at out-of-town developments. These are often free, and the shopping centres are often designed to make shopping as easy as possible for people travelling by car⁸. These discrepancies between in-town and out-of-town retail offerings are often blamed, particularly by the business community and by LAs, for decreasing footfall and revenue in town centres. Car parking charges are frequently cited by the business community as being directly related to footfall and revenue.
- 2.1.5 While plenty of commentary and reporting is available in relation to car parking charges, it is currently unclear how much of it goes beyond anecdote, or the aggregated recollections of members of the business community. As a consequence, The Welsh Government is looking

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

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

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

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

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

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

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



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

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

2.2 Research methodology

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

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

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

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

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

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

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



3. Literature review findings

- 3.1.1 This literature review summarises research and information that is currently available online, relating to car parking charges in Wales and across the UK. The search results indicated that little or no formal academic research has been carried out in this area, other than that done by Local Authorities or organisations such as the Federation for Small Businesses⁹. As such, this review focusses on research of this type, as well as newspaper articles covering parking charges at a local, national and UK level. It focuses on five areas in Wales, following on directly from the areas covered by the Welsh Government's 2014 report 'Town Centres and Retail Dynamics - Towards a Revised Retail Planning Policy for Wales'. The following review provides an outline of the key issues and approaches, as well as the views expressed and conclusions reached.
- 3.1.2 The full links to the sources used in this review can be found in the footnotes and in appendix 1.

3.2 Car parking charges and footfall in town centres in Wales

Views of local business owners

- 3.2.1 In general, business owners and their representative bodies say that they want free car parking in town centres. These views are frequently expressed, but are only infrequently backed up by evidence showing a clear relationship between car parking charges and footfall and/ or revenue. In a survey of 58 local retailers carried out by the Welsh Liberal Democrats in 2013 in Rhondda, 100% of the business owners interviewed said that they felt that an increase in car parking charges had affected their business¹⁰. They also felt that the fact that the perceived vitality of one of the towns in the local area was a direct result of free parking being available there. The Federation of Small Businesses in Wales expressed concerns about the impact that car parking charges are having on local economies, particularly in relation to out of town retail areas where free parking is available¹¹. For example, in Ruthin, a local business owner explicitly related the closure of her 83 year old jewellery business to car parking charges¹².

Local Authority activity and reactions to it

- 3.2.2 Introducing or increasing charges for car parks frequently becomes a contentious local issue. The local press often gets involved in the debate, as do local councillors, particularly those in opposition. In Ammanford, Carmarthenshire, the local press covered a 2014 disagreement by two local councillors about the disproportionate impact car parking charges can have on small towns¹³. Car parking charges were explicitly, but anecdotally, related by one councillor to the lack of footfall in the town (no evidence was supplied). Another councillor expressed

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

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

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

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

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



the view in 2014 that other factors, such as a general slowdown in the economy, can also have an effect¹⁴. One councillor, the leader of the authority at the time, directly related the loss of their seat, again anecdotally, to increases that their administration had applied to car parking charges and the public's reaction to media coverage of this issue¹⁵.

- 3.2.3 Frequently, Local Authorities directly relate their decision to introduce or increase charges for car parks to cuts in their overall budget. Isle of Anglesey County Council explicitly related its decision to increase parking charges to having to make savings¹⁶. This approach is sometimes challenged in the press, and by motoring organisations, who say that parking charges should be used to manage demand¹⁷.
- 3.2.4 Some Local Authorities have decided to implement free parking in an explicit attempt to motivate the local economy, Flintshire County Council and Swansea City and County Council in particular. The Federation of Small Businesses in Wales commended Flintshire for taking this approach¹⁸. In July 2014, Swansea Council reduced its hourly parking rates to £1 per hour for up to three hours. In relation to this, June Burtonshaw, a local councillor, said: "We are committed to supporting local businesses in the city centre and do what we can to encourage more people to visit". Information about the effect that this has had on footfall is not currently available.
- 3.2.5 Cardiff Council introduced car parking charges in five of its town centre car parks in 2012 in an explicit attempt to manage demand and reduce journeys taken by car. This was implemented as part of a project it was running in conjunction with the Welsh Government and Sustrans¹⁹. The aim of the four-year project is to encourage visitors to travel using more integrated, sustainable and healthier forms of transport than cars. While the evaluation²⁰ of this project shows that the number of car journeys has reduced, it makes no reference to car parking, charges for it or the effect that the Council's changes had. This follows a similar project, focused on encouraging hospital staff across Wales, which resulted in a saving of £183,000 in reduced car parking capacity²¹.

Focus on five key areas

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

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

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

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

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

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

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

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

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



Llanelli, Carmarthenshire, South West Wales

3.2.7 During 2014, local press reported that car parking charges in Carmarthenshire were on the rise. And, that this is the direct result of budgetary pressures faced by the Local Authority. They had to make savings of £31 million over a three year period and this has had an effect on many services, car parking included. As this announcement was made in May 2014, there is currently no information available on the impact that the changes have had. However, there is evidence that the changes resulted in 27 objections from a local population of 182,000²².

Newport, Gwent, South East Wales

3.2.8 Newport City Council introduced free parking for up to five hours in 2010 and then withdrew the scheme in February 2013²³. A report published by the council in 2011, indicated that there was a 'significant' increase in the use of the council's town centre car parks in the period immediately following the removal of parking charges²⁴. One car park saw an increase of 12% in use when compared to the equivalent period a year earlier. 30% of city centre traders reported an increase in trade and 80% of them attributed this to the removal of parking charges. Subsequent to February 2013, motorists have had to pay £1 to park for up to three hours. The council justified this decision on the basis that the free parking was costing them £850,000 per year and also on the basis of budget cuts. In particular, a funding gap of £8 million in a 12 month period.

Ruthin, Denbighshire, North East Wales

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

Llangefni, Anglesey, North West Wales

3.2.10 In 2010, car parking charges were increased in a variety of locations by the Local Authority in Anglesey, including Llangefni. The authority justified this as a means of generating income to prevent cuts to other services, and as a means of implementing a more consistent approach to parking charges across the island²⁵. Local businesses and their representative organisations objected to the move, indicating that they thought it would

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

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

24

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

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



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

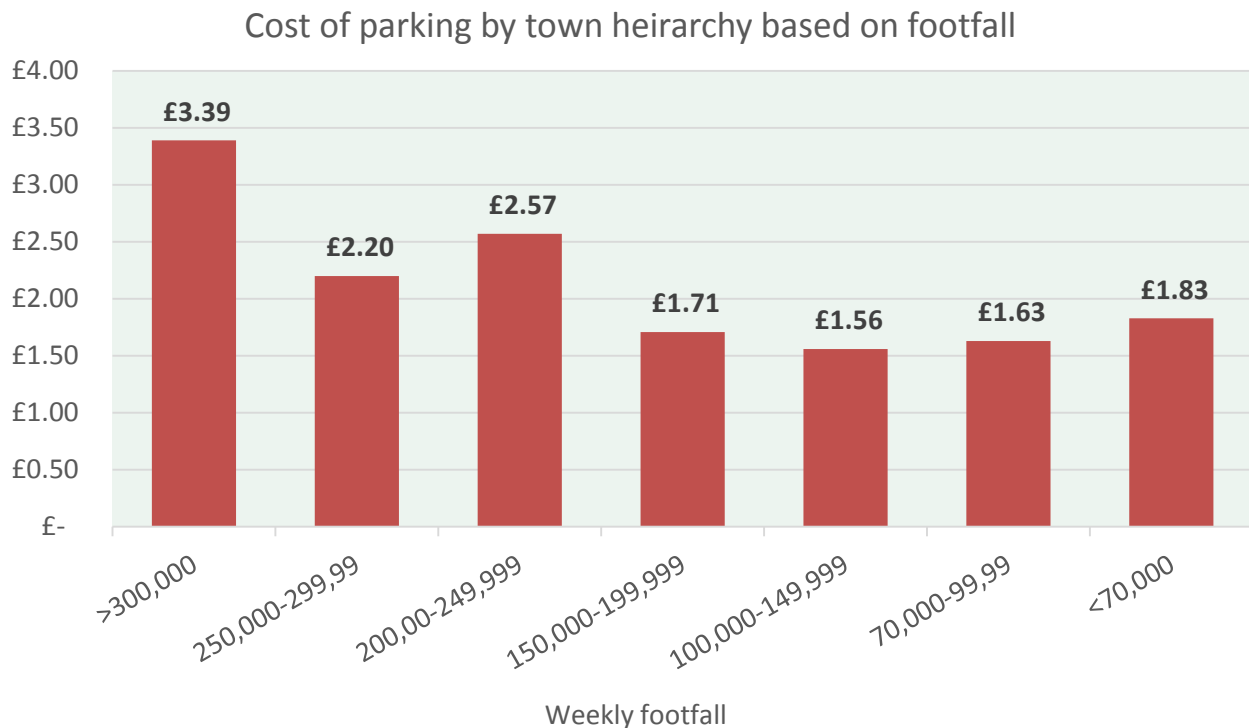
Aberystwyth, Ceredigion, West Wales.

3.2.11 An NCP survey in 2010 indicated that motorists in Aberystwyth take longer, on average, to find a parking space than motorists in any other UK location²⁶. In 2014, local businesses have been calling on the Local Authority to take a town centre car park into public ownership. They are keen to see the two hour time limit extended, in order to encourage people to spend longer in the town centre²⁷.

3.3 Issues across the UK in general

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

3.3.2 Two research based reports have concluded that footfall and car parking charges are, at best, only weakly related, and that a number of other factors may be more important. For example, the British Parking Association showed²⁸ that car parking charges are not very strongly related to footfall, or to the quality of a town's retail offering. The following chart indicates their findings.



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

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

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



- 3.3.3 Furthermore, Yorkshire Forward, a regional development agency, concluded²⁹ that the key factor affecting the economic vitality of market towns is what the town has to offer, rather than parking. They also concluded that several aspects of parking are more important to customers than price, availability of spaces being the most important factor.
- 3.3.4 This report also cites some research carried out in Winchester in 1996, subsequent to the introduction of a managed parking regime. Attitudinal surveys indicated that the main motivation for choosing a parking location is convenience rather than expense.
- 3.3.5 For business owners and the public, charging is a key, contentious issue. The Federation of Small Businesses (FSB) has published a number of reports on local trade and town centre vitality^{30,31}. While these repeatedly make the point that there is a link between increasing car parking charges and dwindling footfall and revenue, little is provided in the way of evidence beyond anecdote. They do recognise the need for an integrated approach to town centre transport and parking and that charges can be used to help manage daily demand. However, formal research by Sustrans³² found that traders over-estimated car use and under-estimate pedestrians, potentially skewing their view on these issues. Furthermore, pedestrians have been shown^{33,34} to spend more per month than bus users and car users; they spend less per individual visit, but make more visits, further indicating a bias in the views of business owners.
- 3.3.6 In 2013, Vale of White Horse District Council carried out some research into the impact that the provision of 2 hours free parking had in the towns of Abingdon, Faringdon, Wantage and in the settlement of Botley. This indicated that 16 local businesses reported an increase in custom after the introduction of free parking, but this increase occurred in only 35% of the businesses surveyed³⁵. As is the case in Wales, there does not seem to be any formal research looking at changes in car parking strategies and recorded footfall or business revenue.
- 3.3.7 As in Wales, Local Authorities are likely to justify increases to car parking charges in relation to budgetary constraints, but others do so in relation to demand management. One Borough Council in Suffolk conducted a survey which indicated that just under 50% of respondents thought that parking charges were a reasonable way to make up part of a budget deficit. This was met with some hostility from the local business community. In response to a local press claim that the Local Authority was profiting from car parking charges, a local Councillor in Paisley said that high turnover is beneficial to local businesses as it means more people can park and visit the town centre to shop³⁶. The FSB's view is that "parking policy should be seen as an integral part of transport strategy" and that it should be "tailored to the individual locality with the necessary balance and adaptability to reflect the needs of the

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

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

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

32 <http://chrisabrunsb.blogspot.co.uk/2009/10/shoppers-and-how-they-travel.html> (2009)

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

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

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

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



individual locality³⁷. Broadly speaking, this is the same view as organisations such as Sustrans take, but their implementation methods for achieving this are very different.

- 3.3.8 The UK Government's 2013 report 'The future of the high streets'³⁸ refers to a number of car park charging pilots specifically aimed at improving town centre footfall. This follows the UK government's decision to allow councils to offer as much parking as appropriate in town centres as well scrapping minimum charge rules. The report states that Braintree, in Essex, has introduced³⁹ parking charges of 10p after 3pm and 10p all day on Sunday. They chose 10p rather than free parking in order to better monitor how the scheme was being used. Figures showed more than 44,000 extra cars took advantage of this scheme over the course of the year, representing a significant increase in footfall in the late afternoons.
- 3.3.9 One article⁴⁰ also indicated that changes to parking arrangements often hit the most vulnerable in our society hardest. Spiralling costs mean disabled residents and carers can struggle to access health and social care services.

3.4 Literature review conclusions

- 3.4.1 Overall, there is a lack of formal research into car parking charges and town centre vitality, at both macro and micro levels. While there is a lot of information available, it is mostly anecdotal; it is based on the views of local business owners, politicians and, much less often, visitors to town centres. However, it is at least possible that these views are skewed by the respective interests of these groups, or their recollections of sudden drops in trade more than gradual recoveries. Unfortunately, the information available online only rarely attempts to go beyond anecdote into more rigorous analyses of the relationships between car parking charges and footfall. There is no formal academic research available online that links changes to car parking charges and real-world recordings of footfall or business revenue. Where research has been carried out (e.g. by local political groups), it indicates that car parking charges and economic performance are at best only weakly related. In addition, it also shows that a number of factors are at play in highly complex local systems, particularly the availability of spaces and the convenience of parking in relation to where people want to go.
- 3.4.2 From the review, it appears that the two main agents motivating and implementing changes to car park charges are the small business community and Local Authorities. In general, the small business community wants car parking to be free or as cheap as possible. They are supported in this by the FSB. However, the evidence base for this is anecdotal, and has been shown to potentially be unreliable. Where formal, robust, research has been carried out, it can contradict the views of the business community, for example, by demonstrating that pedestrians visit the town centre more often and spend more per month (but less per visit) than car or bus users.
- 3.4.3 The FSB does, in common with Sustrans, recognise the need for an integrated, systemic, and highly localised approach to the economic impact of town centre transport policies and infrastructure. Both organisations recognise the importance of using car parking charges to

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

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

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

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



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

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



4. Primary research findings

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

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

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

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

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

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

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

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

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

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



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

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

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

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

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

4.3 The current car parking strategy landscape

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

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

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



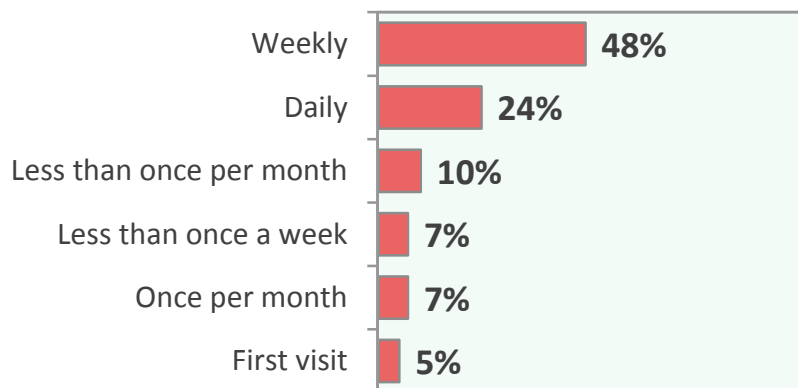
4.3.2 Whilst the majority of the Local Authorities surveyed implement various car parking charging initiatives, they tend to have used the same basic charging strategy for the last few years; mostly guided by council budget cycles.

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

4.4 Travel patterns and motivations for visiting town centres

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

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



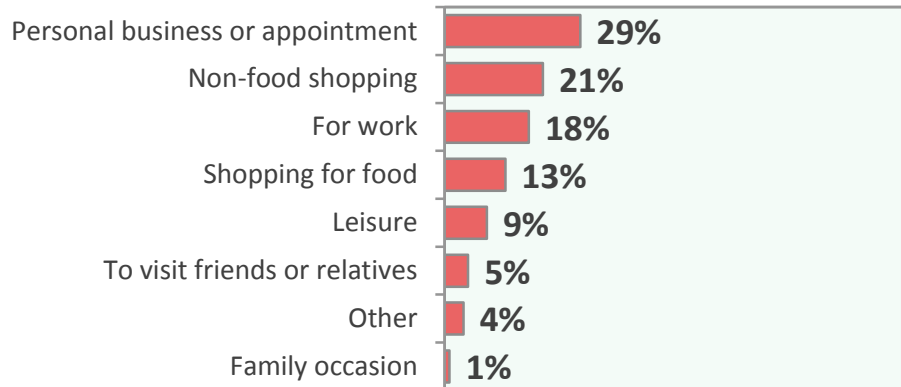
base = 208

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



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

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



base = 208

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

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

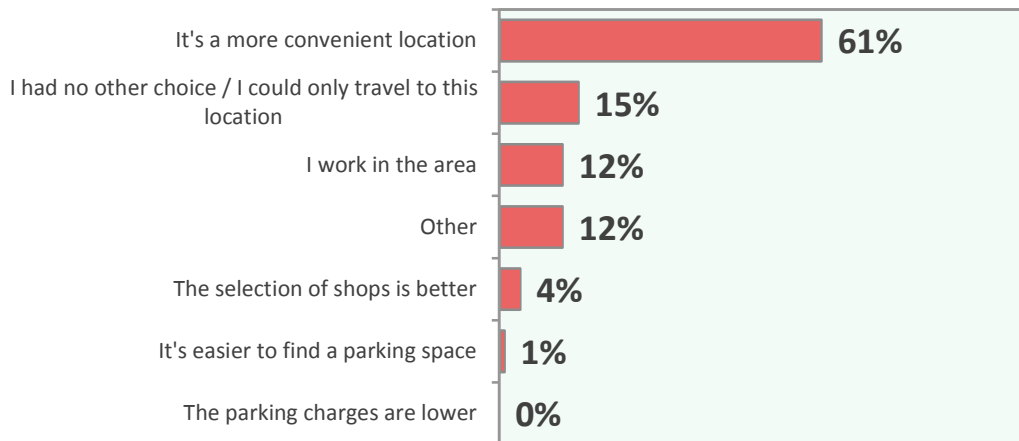


Base = 206



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

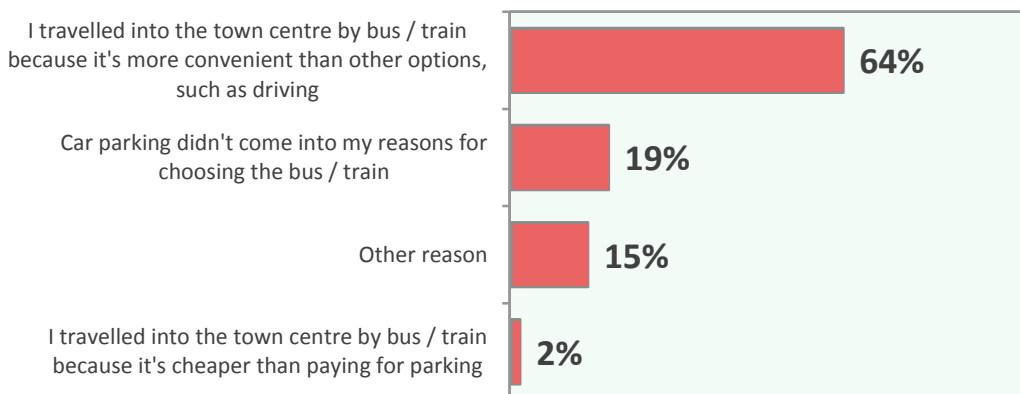
Chart 4. Why did you decide to travel to this town centre today instead of somewhere else?



base = 208

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

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



base =47



- 4.4.7 Around two-thirds of the business owners/ workers interviewed drive to work and those who don't suggest that it's either because they live locally and therefore walk, or cannot afford to pay for parking all day, every day.
- 4.4.8 Around a third of these businesses have their own parking on-site; ranging from 4-30 spaces depending on the size of the business. Some of those who do not park on-site are able to park near to their place of work – either in a designated car park or on-street parking a short walk away. However, business owners/ workers in Newport, Ruthin and Aberystwyth in particular noted the lack of parking for workers in the town centre.

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

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

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

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

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

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

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

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

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

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

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



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

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

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

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

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

“You’ve got to make people want to come here to then take advantage of the car parking.” Swansea BID

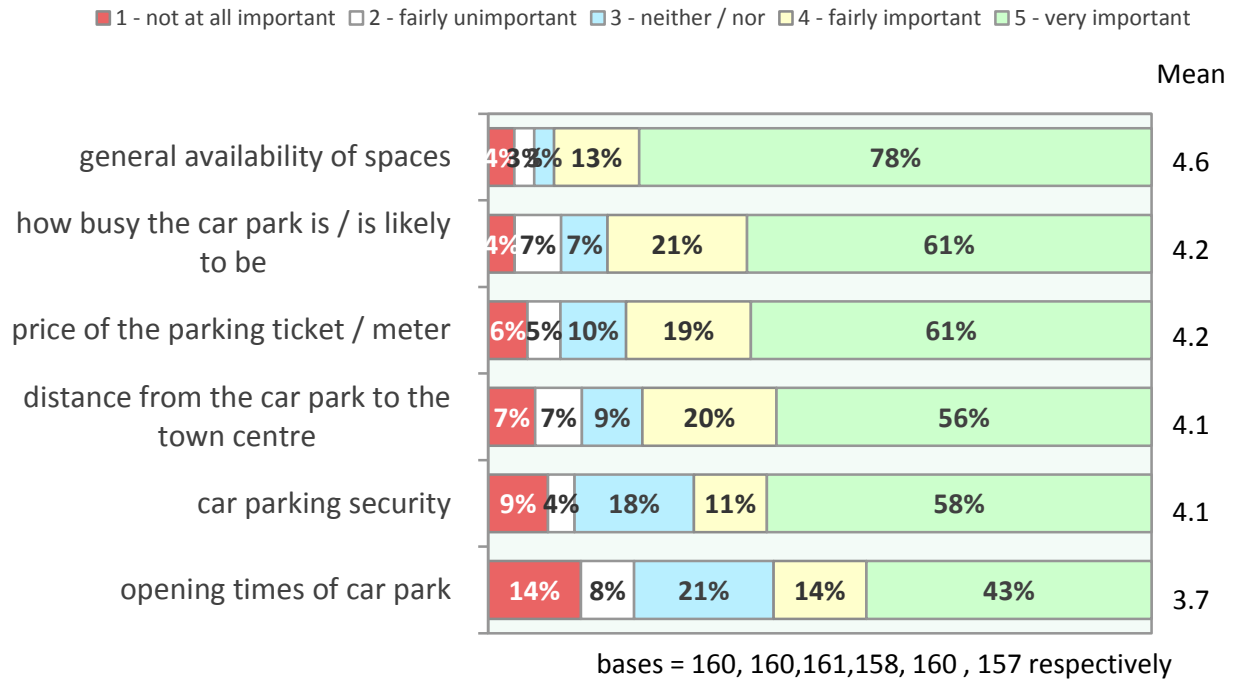
“You pay an awful lot for the parking in Liverpool, but you’re prepared to pay it because the quality of the offer is there. I don’t want to dismiss the fact that car parking has an influence, but I think what is more of a determining factor is the quality of the offer that’s available. People will be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

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



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

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



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

4.4.15 There were some significant⁴² differences between the visitors surveyed:

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

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



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

4.5 Influences and constraints on implementing car parking charging strategies

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

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

“There’s an assumption that that we will get a certain amount of income from car parking.” Local Authority

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

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

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

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

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

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



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

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

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

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

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

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

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

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

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

4.6.1 Measuring the impact of car parking charging on footfall

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



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

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

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



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

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

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

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

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



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

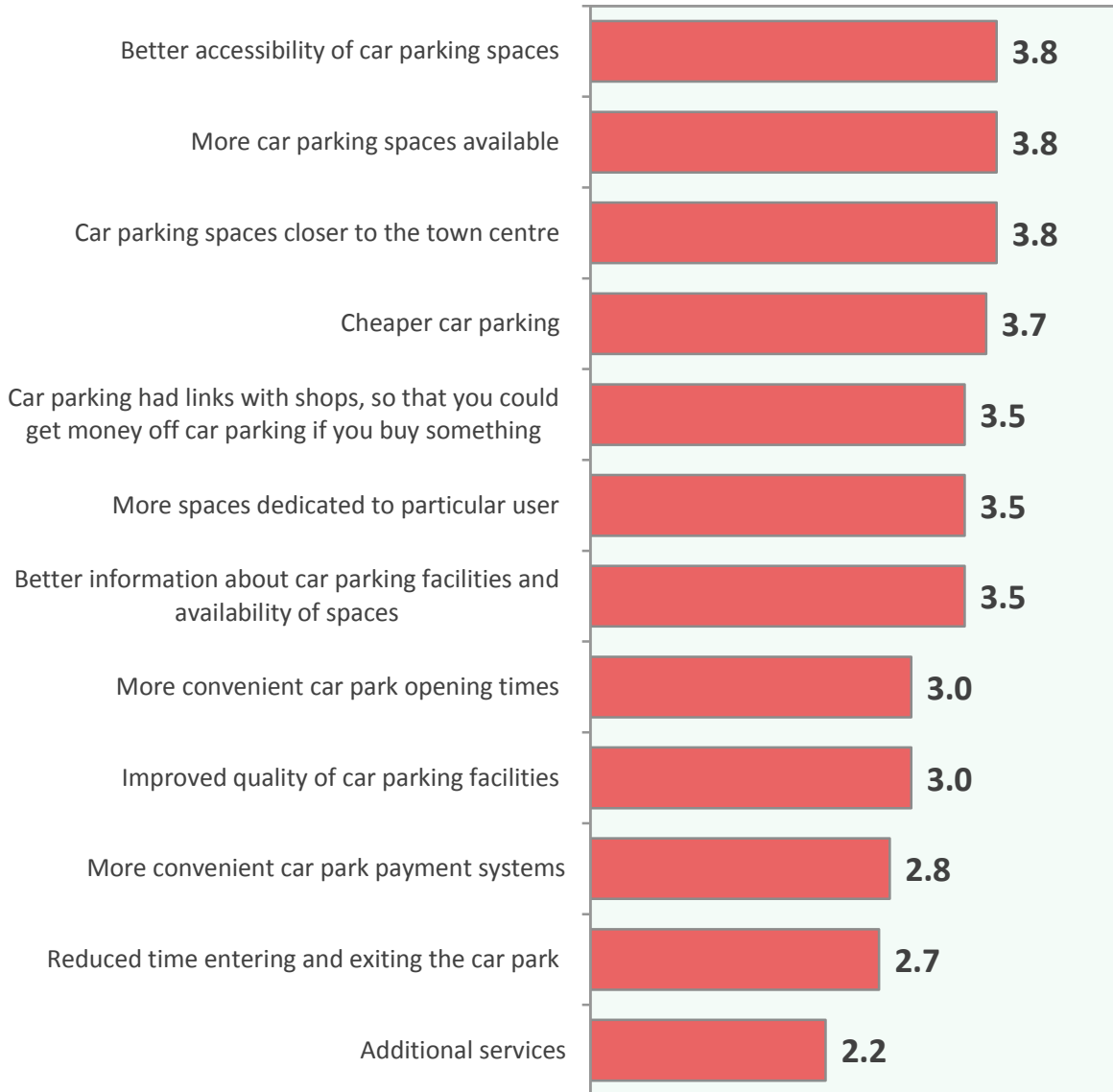
“It could be improved, the problem is the cost and the amount of car parking facilities which I think puts a lot of people off.” Business owner/ worker, Llanelli

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

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



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



base = 208

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



- 4.6.10 Examples of car parking charging strategies that have had a positive impact on footfall
- 4.6.11 Several of the Local Authority representatives interviewed noted various charging strategies that had been, at least anecdotally, responsible for increased footfall in their town or city centres.
- 4.6.12 One example comes from Denbighshire County Council who, for the last few years, has offered a day of free parking during the Christmas period in each of their town centres. This was an attempt to encourage more people to come into the town do their Christmas shopping. Although there was no robust evidence to suggest that this initiative had an impact, it was felt by our contact at the Council that more people were coming into the town on those free days and were spending slightly longer there.
- 4.6.13 Furthermore, Denbighshire County Council trialled free parking after 3pm across all of their car parks with the aim of encouraging people into the town centres. Again, there was felt to be an impact, since footfall was perceived to be slightly higher than usual in the afternoons.
- 4.6.14 Newport City Council offered two hours free parking whilst there was construction work taking place in the city centre, ending in 2013, and suggested that footfall did increase because of it, as did local businesses in the area.
- “It was noticeable when car parking charges were dropped that footfall did increase. And, when the charges were brought back in, footfall decreased a little.”*
Local Authority
- “People do go to Cwmbran as it's free; that's where all the Newport people go now. But, when we do offer a cheaper deal for parking there is a pick-up - when they made two hours free we did see an increase, but it has levelled out now.”*
Business owner/ worker, Newport
- 4.6.15 Newport City Council also noted that when the charges were re-introduced, there was ‘bad press’ from both businesses and members of the public, suggesting that lowering car parking charging not only had a positive impact on footfall, but also on perceptions of the city, and its council, more broadly.
- “When we introduced the free two hours, it actually went down very well. We did it while we were doing a lot of work in the city centre and there was a lot of disruption so we basically said, look, as a bit of a sweetener we'll introduce that. Last year, the charges were brought back in. That had negative press, obviously, because people obviously like something for free.”* Local Authority
- 4.6.16 The local businesses surveyed in Newport suggested that the free parking strategy in Cwmbran was working so successfully that it drawing trade away from Newport.
- “If you go to Cwmbran it's free parking and there are hundreds of car park spaces and it's only five to ten minutes' drive from Newport. It has a terrible impact on Newport - we prefer to go to Cwmbran.”* Business owner/ worker, Newport
- “Cwmbran is somewhere it works well - in the town centre they have free parking.”*
Business owner/ worker, Newport
- 4.6.17 Another example comes from Llanelli where one business owner/ worker interviewed saw a significant increase in sales as a result, at least partly, of a free parking strategy.
- “Two weeks ago we had a Retrofest (local festival) and for the two days it was on the parking was free in the whole of the town and we nearly tripled our business.”*
Business owner/ worker, Llanelli



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

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

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

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

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

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

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

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

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

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

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

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



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

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

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

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

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

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

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

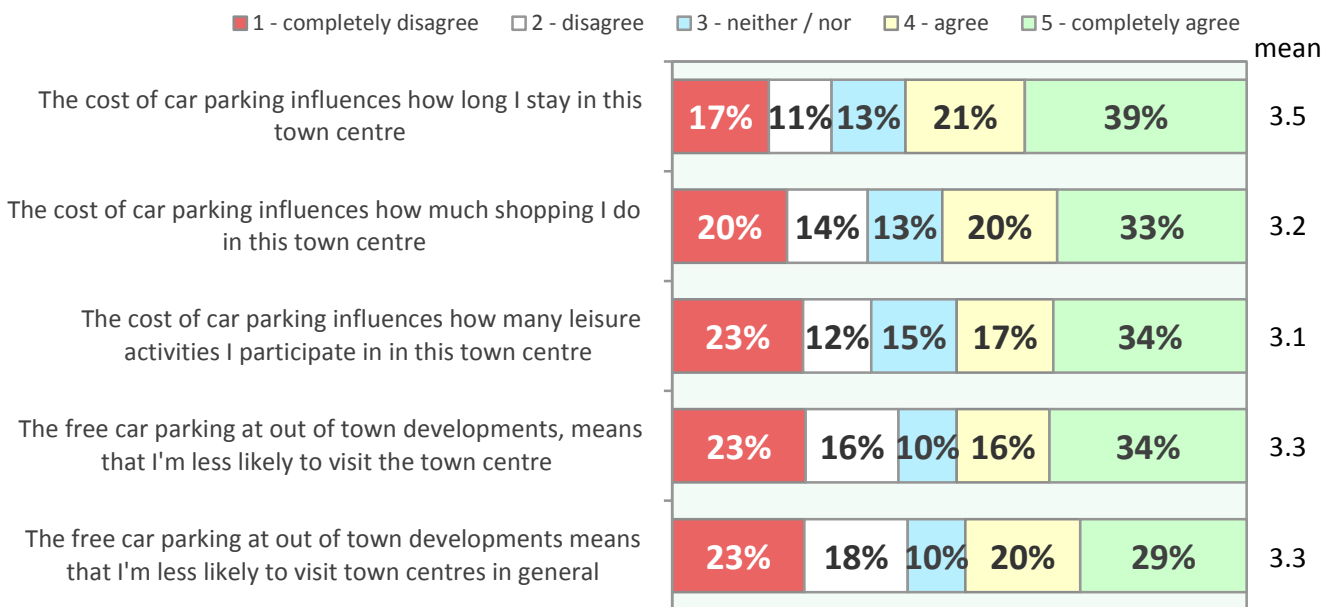
“We don’t consider that there’s a detrimental impact on footfall...the fact that there’s a new charge or an increased charge doesn’t, in our experience, prohibit or diminish the use of the town centre by either commuters or shoppers. We’ve increased charges for the last four years. However, we don’t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

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



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

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



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

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

4.6.31 The role of out of town retail developments

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

4.6.33 The fact that most of these developments offer free parking was felt to give shoppers a reason to go to them over the town or city centres. However, it was noted that the free



parking was one of several motivating parking factors, including better availability of spaces and easier navigation around the car parks. Car parking was also not felt to be only reason for people going out of town; the increased retail offering was noted as the determining factor.

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

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

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

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

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

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

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

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

4.7 Best practice and recommendations

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

- 4.7.2 Furthermore, the type of people parking in the town or city centre must be considered, for example offering blanket free parking in areas where there are high numbers of businesses is unlikely to draw in more shoppers, since the free spaces are taken up by workers. As a



few of the councils have suggested, these charging strategies have worked most effectively when taking this into account, for example only offering free parking before or after a certain time during the working day.

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

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

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

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

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

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

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

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

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

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

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

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



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

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

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

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

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

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

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

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

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



5. Conclusions and recommendations

5.1 Conclusions

- 5.1.1 The impact of car parking charging on town centre footfall is clearly a contentious topic. Much of the debate is rooted in the fact that car parking charging is a complex issue and one that is part of a mix of factors that affect the impact of car parking more generally, as well as the health of local economies at a more macro level. For example, issues around sustainability, town or city centre offering and location, and government and Local Authority budgets to name a few.
- 5.1.2 The literature review and primary research indicated that car parking charges are only one of a number of factors at play in influencing footfall and town centre vitality. It showed that organisations with agendas as diverse as the Federation for Small Businesses and Sustrans share the view that an integrated approach to transport policy is needed, and which is tailored to the needs of local economies. One local authority admitted that it would “really, really struggle to provide a compelling case” that reducing charges would have a positive impact on the local economy, despite their chief executive’s openness to cheaper parking. In addition, the people surveyed indicated that a number of factors are important as parking costs when making decisions about whether to travel to a town centre or how long to stay there. Overall, this research has indicated that the following parking related factors are important determinants of people’s behaviour in relation to town centres.
- Availability of spaces
 - Restrictions on parking (i.e. how long people can park for)
 - Proximity of parking to intended destination
 - Traffic flow
 - Signage
 - Overall retail offering
 - Out of town retail offering
 - Out of town parking charges
 - Price of car parking
 - Security of car park
 - Incentives for parking
- 5.1.3 These factors are subject to ongoing changes, making it difficult to determine the extent to which they are responsible for changes in behaviour. Our survey also indicated that, while people did agree that car parking charges affect their behaviour, convenience is also a critical factor. In addition, the accessibility of spaces, the number of spaces, and the proximity of parking to the town centre were all shown to be as important as cost.
- 5.1.4 Most of the Local Authorities interviewed as part of this research mentioned that the car parking charging strategies they put in place tended to remain consistent for at least a couple of years, although most of them have implemented trial schemes during that time. However, only one Local Authority has actually used findings from the trial to inform car parking policy. It was also noted that the strategies chosen were influenced by a number of factors, including the requirement for revenue generation, budgetary constraints and business and visitor needs.
- 5.1.5 Whilst there is not much existing quantitative evidence on the impact that car parking charging has on footfall, it is possible to identify clear examples, at least anecdotally, of where charges have had either a positive or negative impact on footfall and business custom. For example, **whilst a ‘blanket’ free parking strategy has been suggested to**



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

- 5.1.6 Furthermore, our survey showed that **visitors suggested that car park charging was likely to have an impact on how long they decided to stay in the town centre and, consequently, how much they would spend whilst there.**
- 5.1.7 So, whilst there is evidence to suggest that car parking charges do have an impact on decisions about whether or not to drive into a town centre and behaviours once in the town centre, **general availability of spaces and the extent to which the car park is likely to be busy are often felt to be more important factors than cost in their overall decision about visiting.**
- 5.1.8 As the examples above suggest, the impact that similar charging strategies can have in different town or city centres emphasises the point that **charging must be tailored to the demographic and retail/ business offering nuances of the local area, in order to optimise the positive impact that charging has on footfall and the overall health of the local economy. Remaining engaged with the key stakeholders involved in the local economy,** for example business owners, shoppers, council members etc., is also key to ensuring the optimum charging strategies are adopted.

5.2 Recommendations

- 5.2.1 **Car park charging should not be viewed in isolation from other factors (availability of parking, signage, traffic flow) which affect willingness to drive in town centres.** An overall systemic approach could be taken to future research which examines this complex interplay, rather than one aspect of it. Further quantitative research with visitors, potential visitors and businesses would allow for robust trade-off testing of potential parking packages and these could be modelled to determine the strategies which are most likely to improve footfall.
- 5.2.2 **Local Authorities should be encouraged to consider the impacts of car parking charges in the broadest possible sense, particularly if their primary goal in changing them is to generate revenue.** They should engage with key stakeholders involved in the local economy when changing their car park charges, for example business owners, shoppers, council members etc. This is key to ensuring the optimum charging strategies are adopted.
- 5.2.3 **Local Authorities should be encouraged to collect more robust data on the impact of car park charging in their areas.** This will help further planning around car park charging, both at the local and national level.
- 5.2.4 In developing solutions to encourage greater town centre footfall **the Welsh Government should work closely with Local Authorities and business groups to develop parking strategies** that
- take into account other key decision-making factors (e.g. availability of spaces, parking restrictions, car park security etc.) and
 - protect sustainable revenue income for councils
- 5.2.5 In addition a one size fits all approach to parking strategy is unlikely to work across Wales. The Welsh Government will need to work with Local Authorities to **develop parking strategies that factor in local nuances** around town centre layout and retail offer which



differ between locations. For example, in some areas strategies will need to focus more on parking availability or cost, while in other areas it will be more important to focus on promoting the retail offer in town centres vs. the out-of-town offer.



Appendix A: Literature review sources

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



Appendix B: Stakeholder interview discussion guide

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

Introduction and Warm-up	
Setting the scene / ground-rules	<p>Moderator introduces self</p> <p>Explain what the interview is going to entail – talking about local area in general and parking issues, e.g. charges, specifically</p> <p>No right/ wrong answers</p> <p>Interview will be audio recorded</p> <p>Anonymity is assured</p>
Respondent introduction	<p>Job title?</p> <p>How long been working in that role? (<i>PROBE: ESTABLISH HOW ROLE RELATES TO CAR PARKING</i>)</p>
Section 2 – Setting the scene; the local area/ economy	
	<ul style="list-style-type: none"> • What would you say are the key things in the area that benefit the economy? Why do you say that? <ul style="list-style-type: none"> ○ (Moderator also to probe re the strengths of the local economy) • And, what about the things that are making it more difficult to keep the local economy healthy? Again, why do you say that? (If brought up, moderator to steer conversation away from complaints against Welsh Government esp. re business rates) <ul style="list-style-type: none"> ○ (Moderator to also probe re the weaknesses of the local economy) • Thinking about the town centre in particular, what (if anything) do you see as threatening it? Why do you say that? • And, what about any opportunities? Why do you say that? • How do you think that your car parking strategy is affected by the local economy? • And does it work the other way round? i.e. do you think that the local economy is affected by car parking? • To what extent do you feel car park charging is a hindrance on the local economy and why? • To what extent does car park charging prevent businesses coming to the town centre and why?
Section 3 – Car parking the local area	
	<ul style="list-style-type: none"> • OVERVIEW OF CAR PARKING STRATEGY – CAPACITY/OWNERSHIP (Local Authority v Private)/Responsibility • Does the LA have a car parking strategy? When was it created? etc. (Moderator to ask whether it's possible for us to be sent a copy of the strategy to help with our research) • What, if any, changes to car parking charges has your council implemented? (<i>MODERATOR TO PROBE RE EXACT CHANGES THAT WERE MADE. IF NOT MENTIONED PROBE...</i>)



	<ul style="list-style-type: none"> ○ Any changes to pricing structure (for short vs. long term parking, parking on weekdays and weekends, parking at peak and off-peak times)? ○ Technologies (e.g. single-space meters, pay and display, pay on exit, barrier operated etc.)? ○ Payment systems (e.g. cash, credit card, remote pay, pre-pay vouchers etc.)? ○ Enforcement/ fines? ● Out of town development with free parking – how has this impacted on <ul style="list-style-type: none"> ○ A) the town centre? ○ B) the car parking strategy? ● Why were these changes made/ was this scheme implemented (e.g. <i>budgetary pressures, opposition from local community, with a view to increase footfall etc.</i>)? <ul style="list-style-type: none"> ○ Were there any constraints on the council’s ability to make changes to its car parking strategy (e.g. existing contracts)? ● And how exactly did you implement these schemes? (<i>PROBE FULLY</i>) ● Do you know of any other councils who made similar changes? Did this/ would this have helped you make a decision about which schemes to implement? ● Do/ did you have any way of measuring the success of implementing your scheme(s)? <ul style="list-style-type: none"> ○ What about in relation to footfall in the town centre specifically? ● Do you have any evidence about the impact these schemes have had on the local area? <ul style="list-style-type: none"> ○ (<i>MODERATOR TO PROBE AROUND FOOTFALL, TIMES THAT PEOPLE CHOOSE TO VISIT THE TOWN, LENGTH OF VISIT TO TOWN CENTRE, OPINIONS OF LOCAL BUSINESSES ETC</i>) ○ And what about any impact on specific types of people visiting the town centre (<i>MODERATOR TO PROBE AROUND THE ELDERLY, YOUNG, SHOPPERS, COMMUTERS, LEISURE USERS</i>)? ● Do you think that the changes that have been made have been a success? <ul style="list-style-type: none"> ○ Why/ why not? ○ How do you measure success? ○ Is there anything that would you have done differently, and why? ● Are you aware of any car parking charge schemes that have been particularly successful in other areas of Wales? And what about outside of Wales? <ul style="list-style-type: none"> ○ Any that have been less successful? (Again, moderator to prove re in and outside of Wales)
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Section 4 – Suggestions for improvements/ best practice



	<ul style="list-style-type: none"> • Considering everything that we've been talking about so far, if you were to advise other councils on car parking charging, what would you say? Why? (<i>PROBE FOR THE KEY LEARNING</i>) • Is there anything that you would tell them to avoid doing? Why?
Conclusion	
Additional comments	<ul style="list-style-type: none"> • Is there anything else that you would like to say to the Welsh Government on the subject of car parking? • Is there anyone else who you think it might be useful for us to talk to on the subject of car parking? This could be people you work with or local business owners etc. (Moderator to collect details: phone number and email address)



Appendix C: In-street survey questionnaire

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

Screener

S1 Interviewer record location

Single code – TICK ONE ONLY

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

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

Single code – TICK ONE ONLY

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

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

Single code – TICK ONE ONLY

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



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

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

Single code – TICK ONE ONLY

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

S5 Interviewer code (age)

Single code – TICK ONE ONLY

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

Section A – Visiting the town centre

A1 How often do you travel into this town centre?

Single code – TICK ONE ONLY

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



99	Don't know	0%	
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A2 What is the main reason for your visit to the town centre today?

Single code – TICK ONE ONLY

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

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

Multicode – TICK ALL THAT APPLY

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



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

Can multicode – TICK ALL THAT APPLY

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

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

Single code – TICK ONE ONLY

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

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

Single code – TICK ONE ONLY

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



6	Over 20 miles	11%	
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A7 Roughly how long (in minutes) did it take you to travel to this town centre today?

Single code – TICK ONE ONLY

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

Section B – Car parking in the town centre

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

Single code – TICK ONE ONLY

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



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

(Tick in boxes below)

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





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

(Tick in boxes below)

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



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

(Tick in boxes below)

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



Section C – Demographics

C1 What is your working status?

Single code – TICK ONE ONLY

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

C2 Which ethnic group do you fall into?

Single code – TICK ONE ONLY

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



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

Multicode – TICK ALL THAT APPLY

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

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

Single code – TICK ONE ONLY

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