Breckland Car Park Strategy

Main Report

Contents

Appendices:

Appendix 1 – Wider Parking Context

Appendix 2 – Base Case

Appendix 3 – Charging Implementation Options

Appendix 4 – Parking Technology Options

Appendix 5 – Site Sheets

Appendix 6 – Service Delivery Options

1. Introduction

Parking Matters Ltd (PML) have been commissioned by Breckland District Council (the Council or BDC) to provide input into the Council's review of parking strategy in the district.

Parking is a finite resource and needs to be managed. It is often a significant land use. It supports residents access to services and businesses access to customers. In many British towns and cities, supply is under pressure overall although individual sites maybe be surplus and represent an inefficient use of land. Parking must respond to and support initiatives to change town and city centres, advancing technologies and mobility trends and should act a gateway to the centres they serve.

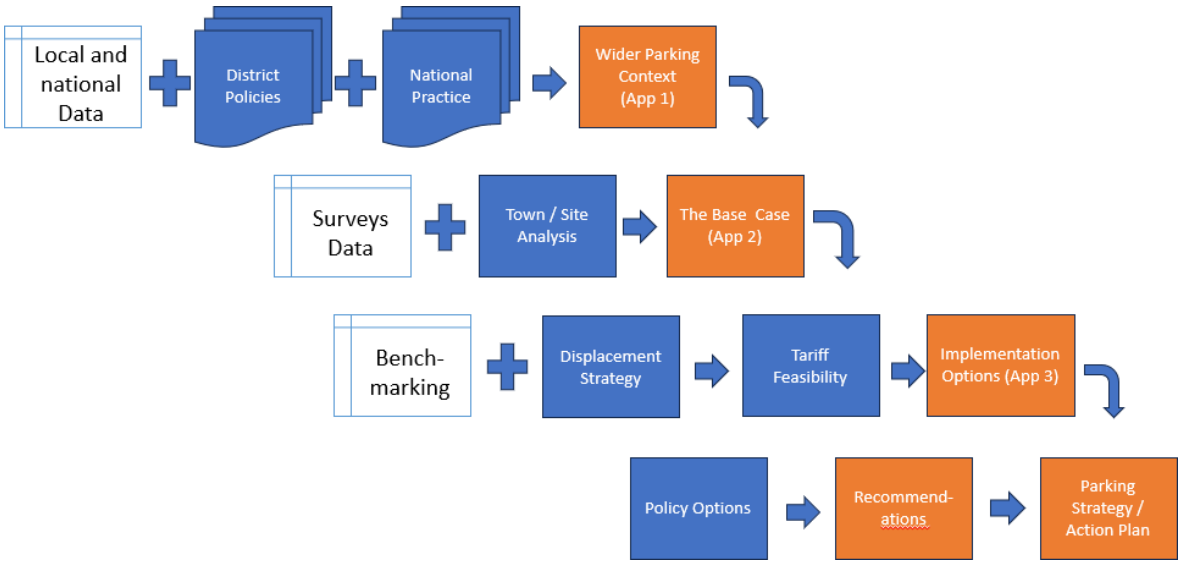
This is where a parking strategy comes in. It should balance the various, often conflicting, objectives and desires of communities and stakeholders.

This Main Report summarises the technical work undertaken for the strategy and refers to Appendices which include more detail, satisfying the brief provided by the Council.

1.1 Methodology

A logical staged approach has been applied to the study based on out many successful commissions elsewhere in the country and our experience of working in and for car park providers and local authorities.

Figure 1. Methodology summary



1.2 Parking wider context

Firstly, we considered the national and local data available (for example car ownership data), the districts' policies and national context to inform the strategy and options available to BDC – this is outlined in Appendix 1 – The Wider Parking Context and includes the general case for managing parking through tariffs and other restrictions to deliver desired outcomes.

Generally the Council parking services should: -

- Support and be aligned with the Council's policies and statutory obligations.

- Provide a positive parking experience (providing users with information, payment options (if applicable), functional equipment with support when needed.
- Connect with local residents and businesses including minimising any impact on adjacent communities.
- Help manage congestion and air quality.
- Be efficient and cost effective.
- Incorporate cashless solutions and accept multi-vendor payments.
- Be flexible and seek to effectively plan for future change and challenges.
- Provide data to help inform policy decisions.

1.3 Parking Charges and the vitality of centres

More detailed information is included in Appendix 1. In summary; while anecdotal evidence suggests a connection between parking options and customer footfall, published research is limited. The Re-Think! Report by the British Parking Association, explores the influence of parking spaces and costs on town centre prosperity, finding a link between parking quantity and footfall but unclear correlation with parking costs. Quality of offerings and location seem more critical in attracting visitors. The relationship between parking and local economies is complex, with councils having limited control over out-of-town developments. Overall, parking charges are viewed as one of many factors affecting town centre vitality, with availability a more significant factor and little evidence supporting their sole significance in destination choice.

1.4 The impact of Free Periods

Trials with free parking showed mixed results. Case studies include examples like Rotherham, Ireland's Mayo County, Shrewsbury, and Vale of White Horse District Council. Feedback from businesses varied, with some perceiving benefits but no consensus on attracting more shoppers. COVID-19 led to councils implementing free parking initiatives, but measuring their true impact amid changing circumstances has proven challenging. Fife Council's trial of various parking measures from 2019 to 2021 concluded that parking alone is secondary to a broader placemaking and town centre strategy. The lack of clear evidence for a significant increase in footfall poses a considerable risk to the implementation of free parking schemes, given their cost to council budgets. More information can be found in Appendix 1.

Given the unclear or at least marginal impact of free periods, the significant and noticeable cost of providing them, not just in lost revenue but increased enforcement, may be difficult to justify. The financial impact of a free period is discussed in later sections.

1.5 Understanding the District and its settlements

Breckland district is very rural in nature and falls into the most rural category in England according to Office of National Statistic (ONS) data. The five towns with BDC managed parking are different in their character and nature and a consideration of the supply/demand, retail and employment offers have formed a key part of our recommendations for each settlement.

Car ownership continues to rise in the district. East–west public transport in the district is good, with express buses and a secondary rail line connecting towns to Norwich, Peterborough and Cambridge, but north-south links are poorer and coupled with the rural nature of the district, the Strategy seeks to balance the requirement for many to travel by car and policy objectives of the Local Transport Plan (LTP) and other plans to promote use of single occupancy vehicle alternatives.

More information is provided in Appendix 2 including an analysis of the survey data collected in 2023 by site. This appendix concludes that: -

- The rurality of the district means that many residents need to use their cars, and this is reflected in Census and DVLA data on car use and ownership. This will create increasing pressure on both on and off-street parking.
- Norfolk County Council and Breckland Borough Council have policies in place to manage single occupancy car use and support actions including the Local Transport Plan and the Breckland 2035 Sustainability Strategy.
- The transport policy position and previous studies including one in 2012 and another 2015 have established the principle that tariffs should be applied in most of BCC car parks to cost effectively ensure that the availability of parking spaces can be properly managed.
- Recent car park usage surveys have conclusively demonstrated that many of Breckland's car parks are reasonably full for much of the day. However, the picture is very mixed, with different usage patterns, user profiles and levels of use across the parking estate.

1.6 Tariff, Technology and Service Delivery Options

Appendix 3 considers tariffs in neighbouring centres and comparable settlements across southern England and considers the potential displacement when tariffs are introduced. Technology options for managing payments are identified in Appendix 4 with site recommendations in Appendix 5. Finally In Appendix 6 we review how parking services can be delivered in the future to ensure an efficient, resilient and customer focussed operation

This report then summarises our recommended approach to introducing parking charges including the technology required to manage payments, compliance management and implementation together with the identified financial implications.

2. Introduction of Parking Charges

At a time when local authority budgets are constrained, it is increasingly important that parking services generate income to support the Council and protect services overall, whilst ensuring that parking supply continues to support local businesses and communities. Implementing a reasonable charging policy can help meet these objectives. Currently parking in the district is free, whilst the cost of operating car parks increase each year due to inflation, thus increasing the pressure on the Council's finances.

Tariffs are also a powerful tool for managing finite parking resource and to influence driver behaviour, to encourage higher turnover of parking spaces and to support access to town centres. Unlike a private provider, local authorities must balance a range of policy objectives when setting tariffs and must consider the justification for parking management. The Road Traffic Management Act 1984 S.22 sets a duty: *"to secure the expeditious, convenient and safe movement of vehicular and other traffic (including pedestrians) and the provision of suitable and adequate parking on and off the highway…".*

2.1 Recommended Parking Charges and Modelled Impact

Based on the analysis outlined in Appendix 3, we have formulated a tariff strategy for each town having regard to the individual characteristics of each. As parking charges are to be implemented for the first time we can only estimate future parking demand based upon available survey data and our experience of similar locations. Appendix 3 considers the potential demand impact of introducing charges and to what extent parking demand may be lost either via displacement to nearby streets or

alternative off-street parking, and there is also a likelihood that some existing car park users may consider car share or other transport modes rather than pay directly for parking. Residential usage is also high in some car parks and therefore the impact of nearby residents has also to be considered.

Specific recommendations for each town are set out below.

2.1.1 Attleborough

It is generally recommended that smaller car parks are aimed primarily at short stay parking with any longer stay and commuter demand directed at larger car parks. This is to help ensure that spaces are generally available on all car parks to improve the visitor experience and minimise drivers having to navigate between car parks in the town centre to locate a space. In the case of Attleborough we would therefore recommend that longer stay demand is directed at the larger Queen's Square car park.

In our opinion there is a clear case for charging at Queens Square and Edenside to manage demand at the sites and contribute to the cost of service budgets. We have assumed charging hours between 0800 and 1800 Monday to Sunday (a 10 hour charging period), with a flat charge applying on Sundays to help encourage longer dwell times. We have not recommended the implementation of charging at the Horse Pit car park as the low demand levels and corresponding level of financial return would not make this viable.

The level of charges proposed are relatively low reflecting the size of this market town.

Figure 2 - Recommended Tariffs for Attleborough

Band (Mon-Sat)	1 hr	2 hr	3 hr	4 hr	10 hrs	Sunday
Queens Sq.	£0.60	£1.00	£1.40	1.80	3.00	£1.00 fixed fee
Edenside	£0.60	£1.00	£1.40	Maximum Stay 3 hours		£1.00 fixed fee

2.1.2 Dereham

The analysis in Appendix 3 confirms that there is a clear case for charging across the town with exception of Becclesgate (Swaffham Hill), where the site upgrades required and limited demand would make this unviable.

Again our approach is to focus longer stay visitor demand in the town in Cherry Tree and short stay visits in the smaller Cowper Rd car park. Despite its smack size, we recommend that long stay tariffs should be available in the Guildhall (Business Centre) Car Park to support the employers and the commercial viability of the office space (owned by BDC) We have assumed charging hours between 0800 and 1800 Monday to Sunday (a 10 hour charging period), with a flat charge applying on Sundays.

We have recommended higher charges for Dereham than Attleborough to reflect that fact that it is the second largest town in the district with a good retail offer and large hinterland.

Figure 3 – Recommended Tariff for Dereham

Band (Mon-Sat)	1 hr	2 hr	3 hr	4 hr	10 hrs	Sunday
Cherry Tree And Guildhall	£0.80	£1.20	£1.60	2.00	3.20	£1.20 fixed fee
Cowper Rd	£0.80	£1.20	£1.60	Maximum Stay 3 hours		£1.20 fixed fee

2.1.3 Swaffham

Swaffham with its pleasant town centre again has a strong case for the introduction of parking charges.

However, as Lynn Street appears to be predominantly used by residents it is unsuitable for parking charges.

Of the others car parks, where implementing charging is recommended, Theatre Street is the largest and is therefore recommended to cater for longer stay demand.

As our recommendation is for Blue Badge holders to be charged for parking (Section 2.5), we have recommended a charging regime for the Pit Lane car park.

Figure 4 – Recommended Tariffs for Swaffham

Band (Mon-Sat)	1 hr	2 hr	3 hr	4 hr	10 hrs	Sunday
Theatre Street	£0.60	£1.00	£1.40	1.80	3.00	£1.00 fixed fee
Market Place, Pedlar's Lane and Pit Lane	£0.60	£1.00	£1.40	Maximum Stay 3 hours		£1.00 fixed fee

2.1.4 Thetford

Thetford, as the largest town in the district attracting heritage tourism, can justify higher parking charges than the other towns.

We have recommended charging at all car parks with the exception of Bury Road where utilisation is very low due to its location away from the town centre.

As there is no specific large car park with adequate capacity, where long stay parking demand can be focussed we have not recommended a maximum stay for any of the car parks.

Band (Mon-Sat)	1 hr	2 hr	3 hr	4 hr	10 hrs	Sunday
Tariff	£1.00	£1.50	£1.80	£2.30	3.80	£1.50 fixed fee

We are aware that Travelodge residents may be excluding from parking charges at Bridge Street, and therefore the specific provisions of any contractual arrangements will need to be checked by the Council prior to implementing charges at the car park.

2.1.5 Watton

Our analysis in Appendix 3 concludes that due to the amount of free alternative parking in Watton, it would not be appropriate or cost effective to introduce parking charges at the current time. The risk with charging in Watton is that there are so many alternatives for avoiding paying for parking (Tesco and on-street) that your deficit is likely to increase rather than decrease due to enforcement costs. There would also be a snowball effect of residents complaining about on-street parking and Tesco then enforcing too and increasing the problem, leading to demand for residents parking zones, etc.

Alternative options available for the car parks in Watton are:-

- Do nothing and fund the shortfall from revenue from the other car parks. The car parks do serve a function, serving local businesses and services whilst keeping parked cars off the highway.
- Explore whether the Town Council will take them over on a lease or contribute to the costs.
- Dispose of the car parks for development – This would cause similar issues as introducing charging as parking will be displaced on street. From the survey data, there appears to be an oversupply however, therefore we would recommend exploring the disposal and development of the Kittell Close site (Queens Hall has its own parking).

We would therefore recommend:-

- Exploring the disposal of Kittell Close
- Investigating whether the Town Council will take over the other 2 car parks, but in any event we would recommend that BDC maintains free parking until there is a viable business case for charging.

2.2 Evening Charges in District Car Parks

At the present time, we would not recommend the introduction of evening charges (after 6 p.m.) in the district as the revenue generated would not be significant and there is a risk that this could adversely impact the evening economy.

2.3 Season Tickets/Permits

Season tickets are offered by parking operators for a number of reasons including: -

- Improving cash flow by taking payments in advance for annual or quarterly season tickets.
- Providing discounts to make all day parking more affordable for regular users where daily tariffs are set at higher levels to optimise revenue from casual infrequent users, or are set to deter long stay parking other than for key workers.
- Encouraging loyalty where there may be alternative facilities available via other operators.
- Where businesses want to pay for their staff parking directly and invoiced arrangements are more convenient than reimbursement via expenses.
- For the convenience of regular users where season tickets provide a relatively frictionless experience, compared with having to historically have change to pay and display each visit.

Given the lack of alternative parking, and the relatively low levels of all day parking charges proposed we have not recommended the sale of discounted season tickets for town centre workers. In addition, Covid-19 has significantly increased flexible working habits this has impacted general

demand for season tickets as workers are now more likely to work from home, at least for a couple of days per week making standard season tickets calculated for 5 or 6 days per week poor value. The general availability of cashless payment options have also made daily payment significantly easier too, improving the customer experience for regular users.

Should businesses be interested in paying for staff parking in advance then this could still be arranged directly with them with the payment due invoiced at the daily rate per space for the agreed period.

With regard to other permits, the analysis in Appendix 3 does identify that residents' use of some car parks is very high. Whilst current levels of usage impact the availability of parking spaces for visitors at peak period, there are likely to be traffic management benefits of allowing limited residential use to prevent parking on street during highway peak period. This could be managed by the Council offering annual resident off-peak car park permits which would allow residents to park on a specific car park between 8 a.m. and 10 a.m. and 4 pm to 6 p.m. Monday to Friday and all day Saturday and Sundays. At all other times the appropriate tariff at the car park would have to be paid. In Thetford where car park occupancy is still very high on Saturdays, the restriction could apply Monday to Saturday to ensure sufficient capacity for visitors.

We would recommend that permits are only valid for single car parks to better manage the situation and are initially priced at £150 (inc VAT) per annum initially and limited to residents who: -

- Do not have parking at their property
- Do not live in a controlled parking zone (CPZ)
- Live close to one of the applicable car parks

As we believe there are in excess of 230 residents parking on the car parks at which we are recommending the implementation of charges, if say 100 purchase a permit then this would generate £12,500 per annum (exc VAT).

When setting limits on the number of residents permits to be allowed in car parks, it is difficult to make a firm recommendation on a fixed number. What we would suggest is that BDC request 'expressions of interest' early on in the process once the decision has been made in principle to introduce charging. If the permits are as above (4pm – 10am) then the impact on parking space availability may be quite low. Only if the number of expressions exceeds 10-15% will BDC need to consider limiting the number of permits, for example heavily prioritising first cars in a household, or a 'needs based' system as in often in place in larger residents parking zones such as Brighton and Bristol where demand exceeds supply.

2.4 Future Review of Charges

Tariffs should be reviewed at least annually having regard to the impact of previous decisions upon behaviour and availability of spaces. This is particularly important after the first year of charging.

2.5 Blue Badges

For local authorities, whether or not disabled parking should remain free for all Blue Badge Holders in the District is usually a political decision. All private operators and many Councils charge all Blues Badge holders as they consider that disability is not necessarily related to the ability to pay, and free parking for 3 hours is allowed in many on-street locations. Imposing off street parking charges does also reduce abuse as there is no longer an incentive for Blue Badges to be shared with family members to avoid parking charges.

To limit this abuse, whilst recognising that some disabled users have more difficult parking and getting in and out of their vehicles, we recommend charging Blue Badge holders whilst offering one additional hour over the paid period free with a badge. For visitors with reduced mobility who may find transferring from their vehicle to a wheelchair or other mobility aid on-street challenging, we would recommend offering a restricted mobility permit issued subject to application and the receipt of applicable disability benefit payments. A similar scheme is offered by Dorset Council subject to a £15 payment with the permit expiring at the same time as the Blue Badge,

The exact impact of not implementing charges for Blue Badge holders is extremely difficult to measure as there is no data available as to the proportion of vehicles previously displaying Blue Badges on Council car parks, however from anecdotal evidence from other local authorities, it could represent circa 2%-3% of gross revenue (net of VAT).

Item	Recommendation
Blue Badges	Charge all Blue Badge holders but allow an additional one hour stay free. Offer Restricted Mobility Permits for qualifying Blue Badge holders

2.6 Emissions Based Charges and EVs

The need to reduce carbon emissions is a key driver for BDC in its Sustainability Strategy. Phone payment apps could be a practical way of offering reduced tariffs to encourage the use of low emission vehicles. For example, RingGo offers an Emissions Based Parking (EBP) service using vehicle registrations and information from the DVLA, to automatically vary parking tariffs based on the emissions of the vehicle. In Bath (where MiPermit provide cashless parking services), the council recently consulted on the introduction of vehicle emission-based parking charges in council-owned car parks. We recommend that this is put aside until the tariff strategy is implemented and established

At the outset of policy initiatives to encourage electric vehicles free parking, as well as EV charging was considered in some places (e.g. Bristol. Swindon). However, generally EVs do have to pay for parking whilst charging. This is for several good reasons. Firstly, parking and charging are two separate services, and parking places relate back to traffic management objectives. Secondly, to encourage turnover of limited EVCPs and allow others to charge. Thirdly, if EVCPs are as part of a scheme to help residents without off-street parking to charge, this will chiefly be done overnight when charging does not apply anyway.

Item	Recommendation
Emission Based Charges	On future tariff reviews consider introducing higher tariffs for high emission vehicles, subject to reasonable provision of alternative 'cleaner' transport modes.
Electric Vehicle parking Charges	EVs should pay for parking like everyone else to increase churn and allow more EVs to charge, and to reflect the different reasons for the off-street parking and EVCPs.

2.7 Other Recommendations

Our recommendations with regard to passing on payment by phone convenience fees and motorcycle charges are set out below based upon the analysis in Appendix 3.

Item	Recommendations
Convenience Fees	Phone payment app convenience fees should be passed on to service users parking at the Council's car parks to ensure the cost effectiveness of providing this service.
Motorcycle parking	Charge motorcycles for parking, where possible using payment by phone, but where this is not possible and card payment is used to purchase a ticket, providing information for motorcyclists to ensure that they evidence the purchase of a ticket by: • Writing the registration number on the ticket and noting the serial number (e.g. writing it down or taking a photo). • Taking a photograph of the pay and display ticket on the motorcycle. • Using or purchasing a permit holder like that formerly used for a tax disc and the ticket can be placed inside

2.8 Financial Implications

The financial implications are summarised in Figure 5 Below These forecasts are estimates only and are based on our interpretation of available survey data, estimated elasticity of demand, and experience derived from carrying out similar exercises in other locations. Given the surveys only provide a snapshot of usage over a few days, we have had to extrapolate the survey data to arrive at an annual forecast of car park visits for each car park. As no survey data was available for the Minster Gate car park in Thetford, we have estimate annual revenue having regard to the forecast for other car parks in the town.

There is significant risk surrounding any estimate of the amount of displacement that may occur once charges are implemented. Appendix 3 considers the risk in more detail having regard to the potential for vehicles to park elsewhere in each town. We are aware that the Council has been in discussion with another authority where c40% of transactions were displaced, however different locations are likely to experience differing levels depending upon the number of alternatives, particularly on-street. The number of longer stay users displaced (residents and workers) is likely to be much higher than short stay users too.

In Figure 5 we have modelled the revenue that may be generated, both assuming a 40% reduction, and our own analysis having regard to displacement opportunities and the differing predicted behaviours of long and short stay users. Based upon our experience, our analysis in **Appendix 3** suggests that some displaced users will return to the car parks after the first year too. The model assumes that everyone using the car parks is required to pay and therefore any concession arrangements (Bridge Street, Thetford) will reduce the projection.

It should be noted that the forecast annual revenue impact is gross (but exc. VAT) and has been calculated before any deduction for operating costs and other allowances – for example where car parks are subject to revenue share arrangements. If revenue share arrangements do apply, the

actual revenue impact will be lower, therefore, to assist the Council in forecasting the net impact, we have provided forecast revenues broken down by car park and town.

The introduction of the proposed small flat charge on Sundays and bank is unlikely to materially impact vitality, but has the potential to increase parking revenues by c.5% to 7.5% based upon our experience of similar locations, in the absence of existing Sunday car park usage data. Revenue from Sunday parking events is not included within the forecasts in Figure 5 which relate to Monday to Saturday only. Instead it has been forecast separately later in Figure 6 should a decision be made not to charge on Sundays.

Figure 5

	Forecast Tariff Implementation Impact (Exc. VAT)			
	40% Displacement	PML Forecast of Displacement		
		Year 1	Year 2	Year 3
A - Edenside	£ 35,785	£ 20,368	£ 24,119	£ 25,057
A - Horsepit	£ -	£ -	£ -	£ -
A - Queens Square	£ 41,648	£ 44,019	£ 60,761	£ 64,109
A - Total	**£ 77,433**	**£ 64,387**	**£ 84,880**	**£ 89,166**
D - Cherry Tree	£ 245,086	£ 248,699	£ 281,561	£ 291,226
D - Cowper Rd East	£ 127,721	£ 122,215	£ 153,777	£ 169,557
D - Swaffham Hill	£ -	£ -	£ -	£ -
D - The Guildhall	£ 47,880	£ 48,955	£ 55,998	£ 58,010
D - Total	**£ 420,687**	**£ 419,869**	**£ 491,336**	**£ 518,794**
S - Lynn St	£ -	£ -	£ -	£ -
S - Pedlars Lane	£ 14,915	£ 17,401	£ 18,603	£ 19,805
S - Pit Lane	£ 2,119	£ 2,309	£ 2,309	£ 2,309
S - Station Yard	£ -	£ -	£ -	£ -
S - Theatre St	£ 103,987	£ 121,318	£ 135,605	£ 139,177
S - Market Place	£ 34,362	£ 40,089	£ 50,673	£ 53,319
S -Total	**£ 155,383**	**£ 181,117**	**£ 207,191**	**£ 214,611**
T - Bridge St	£ 65,626	£ 72,491	£ 88,598	£ 92,836
T - Bury Rd	£ -	£ -	£ -	£ -
T - Cage Lane	£ 19,955	£ 26,606	£ 28,057	£ 28,782
T - Pike Lane	£ 79,558	£ 106,077	£ 114,382	£ 118,534
T - St Giles West	£ 28,146	£ 28,146	£ 36,128	£ 37,458
T - St Giles East	£ 41,132	£ 41,132	£ 51,736	£ 53,503
T - School Lane	£ 59,799	£ 69,765	£ 81,233	£ 84,100
T - Tanners St North	£ 39,850	£ 46,491	£ 55,886	£ 58,234
T - Tanners St South	£ 63,885	£ 74,532	£ 91,078	£ 95,215
T - The Link	£ 32,245	£ 25,059	£ 30,783	£ 32,214
T - Whitehart St	£ 28,306	£ 33,024	£ 38,123	£ 39,398
T - Minster Gate	£ 105,750	£ 119,850	£ 128,240	£ 135,934
T - Total	**£ 564,252**	**£ 643,174**	**£ 744,242**	**£ 776,208**
W - Goddards Court	£ -	£ -	£ -	£ -
W - Memorial Way	£ -	£ -	£ -	£ -
W - Kittel Close	£ -	£ -	£ -	£ -
W - Total	**£ -**	£ -	**£ -**	**£ -**
Total	**£ 1,217,755**	**£ 1,308,547**	**£ 1,527,648**	**£ 1,598,778**

3. Operational recommendations

3.1 Payment systems and technology

The available options for parking technology are covered in detail in Appendix 4 with specific site recommendations in Appendix 5.

3.1.1 Recommended Approach for Breckland

Whilst payment on exit via a barriered system is generally accepted as the best option for customer service and payment compliance, we have discounted this for the district given the capital costs required to implement these systems, the potential impact of queuing on the highway, and the site reconfigurations that would be required to increase the number of access/egress lanes required for an efficient operation.

Instead we recommend a cashless payment strategy based upon a mix of card only, solar powered, ticketless payment terminals, a payment by app/phone system) and the National Parking Platform ((see Appendix 4 for further information regarding these systems). Th payment terminals should also have check in/check out functionality to allow a pay on departure option. This approach will minimise initial capital outlay and ongoing revenue costs to deliver as efficient a service as possible whilst providing a positive customer experience.

There should be a proactive marketing campaign in the lead up to implementation with key messages including where and how to pay should be included in machine signage, the Council website and other communication methods. Alternative payment method and outlets such as Paypoint should also be identified.

3.2 Financial Implications

Figure 6 below summarises the financial implications of our recommendations. These include allowances for: -

- Revenue as modelled in Figure 5 based upon the high level assumptions made.
- Residential permit income assuming 100 @ £150 (inc VAT) per annum
- Card transaction costs at 3%, however the actual costs will be dependent upon the Council's contract with its payment provider.
- The installation of 24 payment terminals @ £6,000 per machine (including installation)
- The machines will require a cloud based reporting system, the cost of licences for which is assumed @ £600 per annum per machine.
- Maintenance including vandalism
- Signage at £750 at each site where the implementation of charges is recommended.

Please note that these costs exclude any contractual payments due under any Civil Parking Enforcement contract. The options available for enforcing payment are considered in section 3.3 below, together with an indicative range of costs derived from current contracts with similar local authorities.

Figure 6

3.3 Parking Service Delivery Model Recommendations

The different options available for the delivery of parking services in the District are reviewed in detail in Appendix 6.

The way that a service or contract is managed is more important than the delivery model. A well-resourced and well-run in-house service can be as efficient as a contracted service and offers the benefits of easy access and direct control.

Based on previous work and available information we would expect that if the Council was to bring the operation in-house there would be reduced resilience within the service and the initial costs would be high. Ongoing costs would need to be assessed in line with the SWOT analyses provided in Appendix 6. The main drivers of increased costs would be the loss of economies of scale and purchasing power, although there could be some savings in contractor's overheads and profit, KPI payments and the use of Council accommodation as an operational base. As we have assumed that the Council would prefer to retain full strategic control over parking policy, we have discounted a joint venture partnership approach as a service delivery option. There are also comparatively higher costs associated with setting up/splitting up these types of arrangement.

Given the information provided, and considering the nature of the operation in Breckland, we would recommend continuing with outsourcing arrangement via the Norfolk Parking Partnership which appears to be the best future delivery model as it provides the Council with strategic control whilst minimising service risk and operating costs. As the Partnership are also responsible for on-street parking compliance there should be significant economies of scale in patrolling off street car parks too. Providing reasonable contract terms can be agreed with service level agreements and key performance indicators, BDC should work with the Partnership to find improvements and additional resources if required.

Any outsourced operation should require the contractor to focus on deployed hours and patrol frequency requirements supported by focused KPIs, service improvements, the adoption of technology and working practices that could improve efficiency and customer service.

It is essential that the agreements/contracts provide both parties with the flexibility to introduce improvements including new technology to collect improved data and potentially utilising the National Parking Platform to improvement the range of payment options.

3.3.1 Indicative Costs

At this stage, It is difficult to predict with any accuracy what an enforcement contract in the district might cost. It will depend upon a range of factors including the level market engagement and interest when procured, and the requirements of the service specification, in particular the number and frequency of civil enforcement officer patrols.

We have however analysed the actual costs incurred by a sample of other local authorities with similar geographical characteristics for their outsourced enforcement contracts. We have found that there is a large range of costs per space which will largely be due to how many deployed hours were proposed by the contractor in each case but would also be dependent upon a number of factors including: -

- Whether the contract is carried out by a private contractor, or a partnering local authority service which also enforces on-street parking (similar to the Norfolk Parking Partnership) where there are staff deployment economies that are shared.
- geographical characteristics such as distance between car parks and towns in the district.
- Number, size and type of car parks (e.g. MSCPs take longer to patrol than surface car parks).

The cost range per car space is between £135 and £235 which based upon c2,000 spaces in Breckland would produce an initial annual contract cost of between £270k and ££470k. The lower side of the range would include district councils who partner with other county or regional services who also enforce on-street and the higher end applies to councils who outsource individually to private contractors. We would therefore expect an agreement with the Norfolk Parking Partnership to have an initial cost closer to £270k per annum. This would cover contract costs only and not any staff employed by the Council dealing with contract management, permits and appeals etc. or central costs apportioned by the Council to the parking cost centre.

The costs would be offset by PCN revenue which we would forecast at c£70k to £80k per annum.

4. Implementation and communications

Taking forward the above recommendations will require an implementation plan including procurement of the CPE service, on-site equipment, payment systems, and the preparation of an off-street order.

Appendix 4 includes site specific recommendations for sites where tariffs are recommended. In general, the car parks are in very good conditions comparable to others we see across the country. Lighting, lining and surfacing is fair – excellent in BDC sites. The implementation of 'Quiet Zones' suggests some anti-social behaviour. Most sites have CCTV, lighting already and the Report a Problem function is an excellent way of gathering user and neighbour feedback[1].

Park Mark represents the nationally recognised 'quality' and safety standard for car parks. As funding is secured to improve sites, they can be improved to this standard. Further details can be found here.

[1] https://www.breckland.gov.uk/article/4532/Car-Parks-report-a-problem

4.1 Communications Strategy

We would recommend that BDC carry out this workstream internally as they know their stakeholders and elected members better than anyone.

Figure 7. High level comms plan

Goals	Method	Audience	When
Support of key decision makers (cllrs)	Working group/ reports / presentations	Councillors, Town Councils	As directed by BDC processes
Communicate 'why' you are doing it	Web / press release	Residents and businesses	At decision point Before off-street order
Communicate 'how' and 'when' you are doing it	Web / press release	Car park users	Before off-street order At delivery

4.2 Consultation

Based on our experience of similar projects within and for local authorities, we recommend that the decision of whether to charge is a decision for elected members advised by their officers. The results of any consultation asking whether charges should be brought in will provide a predictable result.

A more productive consultation exercise will be on the implementation model for example:

- Payment methods; with the benefits of cashless and pay by phone clearly set out (better value for council tax payers, better information, better user experience, longer dwell times for local businesses through extending time etc.)
- Permit systems; should residents be given discounted permits for local car parks to reduce on-street issues.
- Improvements to car parks; how can car parks act as better gateways to the towns, for example, asking users to select their most frequented car park and asking qualitive questions around wayfinding, space availability, lighting, safety perception and
- Some face-face consultation between BDC and stakeholders such as Town Council's and business groups may be necessary to tease out genuine insight into local conditions and permit types appropriate to specific towns and sites.

The results of this consultation exercise will also be useful for identifying any unforeseen issues that will need to be mitigated as part of the equality impact assessment of any decision.

4.3 The Strategy

The implementation plan below in Figure 9 sets out a typical implementation of tariffs for a smaller district. The timescales and exact order of the tasks will be depended on local factors and procedures. The critical path is likely to be the decision-making process.

Timescales will be extended if non-statutory consultation or engagement takes place and extended by 3-6 months if an external CPE provider is preferred, as opposed to the Norfolk Parking Partnership.

As off-street Parking Orders are the legal basis for providing parking spaces, setting appropriate charged and enforcing restrictions, they require the input of appropriately qualified people and BDC legal services should be given early notice of when their input will be required.

4.4 SWOT Analysis

The SWOT analysis below in Figure 8 sets out the identified strengths, weaknesses, opportunities and threats of implementing the recommendations contained in this report.

Figure 8

Strengths ▪ Strong parking demand in most towns evidenced by survey data ▪ Car parks are generally in good condition ▪ The Council has an existing CPE arrangement in place ▪ There are strong strategic policy reasons to implement charges	**Weaknesses** ▪ Whilst survey data provides a guide on existing usage, there is still some uncertainty on the users of each car park and their likely reaction to charges ▪ The revenue modelling can only be an informed estimate at this stage based upon the data available
Opportunities ▪ Displacement may be lower than modelled ▪ As there are no charges at present the Council has a unique opportunity to deliver a high quality, efficient, cashless operation to meet the needs of residents and visitors	**Threats** ▪ High Street performance - inflation/cost of living ▪ Proposals are not communicated properly with insufficient engagement to ensure everybody's needs are identified and properly met to inform decisions and delivery ▪ CPE contract and parking equipment is are not properly specified and procured resulting in delays, poor value and performance. ▪ Displacement may be higher than modelled. ▪ High Inflation may increase implementation costs

4.5 Delivery Plan

Figure 9

Activity	Description	When	Monitoring
Resourcing and implementation			
Decision Making	• Establish a member working group to consider transport and parking across the district with Parking Working Group or similar • BDC processes to decide in principle to adopt strategy including introducing tariffs	BDC timeline	• Action notes from meetings
Resourcing	• Identify staff resources to develop and deliver the strategy at appropriate level • Identify sources for capital funding including to implement strategy	1 – 3 mth.	• Staff resource in place • Budget established
Design tariff and permit regime	• *Optional: Consult on new regime with residents and local stakeholders* • Decide new tariffs • Changes to off-street orders and on-street schedules where required	3 – 4 mth. 3 – 6 mo.	• *Consultation report* • Proposed tariffs and permit regime
Identify delivery model	• Identify deliver preferred delivery partner, i.e. continue working with the Norfolk Parking Partnership or external supplier • *Additional: Procurement of external civil enforcement (CPE) provider* • Discuss detailed delivery requirements with them, design service and set KPIs'	5 – 7 mth. *Allow Additional 3mths if new ext. CPE provider is to be procured*	• Decision made • *Procurement process for external CPE*
Procure on-site equipment	• Carefully specify requirements. • Let tender complying with BDC procedures to procure an equipment supplier. • Carry out site works • Acceptance testing	6 – 8 mth.	• Procurement process and contract
Online payments	• Procure Payment by App provider or preferably join the DfT's National Parking Platform from day-one as an agnostic platform which can deal with multiple pay online / by phone suppliers.	8 - 9 mth.	• Set-up with bank account
Off-street Parking Order	• Prepare off-street parking order to with the help of the CPE provider • Statutory – Notice of Proposals • Statutory – consultation • Statutory – Notice of Making (sealed)	9 – 12 mths.	• Draft parking order
Local on-street TRO parking restrictions	• Work with Highways Authority to consider local impact of on-street parking, especially in Thetford and requirement for TROs	1 – 2 yrs	• Beat surveys • Residents feedback

Glossary

ANPR	Automatic Number Plate Recognition	a technology that uses optical character recognition on images (usually a CCTV camera) to read vehicle registration plates
APDS	The Alliance for Parking Data Standards	A not-for-profit body that Develops, promotes, manages, and maintains a uniform global standard to allow organisations to share parking data across platforms worldwide.
AVP	Automated or Autonomous Valet Parking	A system able to take control of a vehicle and to drive it from the drop-off zone to the parking space and from the parking space to the pick-up zone
BDC	Breckland (District) Council	The local authority for Breckland district
Buchanan Report	Buchanan Order Management Report 'the Buchanan Report'	A report produced in 2020 which looked in detail as streets in Saffron Walden to determine whether additional permit parking places could be recommended to alleviate the permit holder parking pressure as the demand for permits exceeded the supply.
BPA	British Parking Association	A not-for-profit organisation, representing, promoting and influencing the parking and traffic management profession throughout the UK and Europe
CEO	Civil Enforcement Officer	A person employed to enforce parking, traffic and other restrictions and laws in England & Wales.
CIHT	Chartered Institution of Highways & Transportation	A not-for-profit body that represents and qualifies professionals who plan, design, build, manage and operate transport and infrastructure.
CPE	Civil Parking Enforcement	'Decriminalised' parking enforcement carried out by councils rather than the Police under The Road Traffic Act 1991
DEFRA	Department of Environment, Food and Rural Affairs	Central Government Department responsible for improving and protecting the environment
DfT	Department for Transport	Central Government Department responsible for transport and highways in England
DVLA	Driver and Vehicle Licensing Agency	The organisation of the UK government responsible for maintaining a database of drivers in Great Britain and a database of vehicles for the entire United Kingdom.
ECC	Essex County Council	The Local Highways Authority

ELT	Extract, Load, Transform	A data integration process for transferring raw data from a source server to a data warehouse on a target server and then preparing the information for downstream uses
EV	Electric Vehicles	Wholly electric or hybrid vehicles which are capable of being plugged in order to recharge batteries for electrically powered movement
EVCP	Electric Vehicle Charge Point	The charging point for electric vehicles, which can be found in off-street car parks and in some on-street locations
GDPR	The General Data Protection Regulation	Regulation (EU) 2016/679 - a regulation in EU law on data protection and privacy for all individuals within the European Union (EU) and the European Economic Area (EEA).
KPI	Key Performance Indicator	A quantifiable measure of performance over time for a specific objective.
LHA	Local Highways Authority	The Authority charged with the management and maintenance of the public highways under the 2004 Traffic Management Act
LTP	Local Transport Plan	Document produced by Transport Authorities which sets out policy and investment priorities. A material consideration when deciding Planning Applications
LSOA	Lower Super Output Area	One of the smallest geographical statistical units used by the Office of National Statistics and in the Census
NCC	Norfolk County Council	Thet Highways Authority and first tier local authority covering Breckland district
NEPP	North Essex Parking Partnership	The organisation charged with carrying out the parking duties of the LHA including TROs and civil parking enforcement
NPP	National Parking Platform	A DfT backed pilot to bring various data and parking rights information into a publicly owned data warehouse which aims to work with any parking and payments provider
MSCP	Multi-Storey Car Park	A car park on multiple levels
	Off-street Parking Order	The legal basis for providing parking spaces, setting appropriate charges, and enforcing restrictions.
Park Mark	BPA and Police scheme for car parks	An Award given by the Police to car parks that have achieved the standards of the Safer Parking Scheme designed to reduce crime and the fear of crime in car parks.
PC	Parish Council	The third-tier Parish Council's in place across the district
P&D	Pay and display	A parking system in which a motorist buys a temporary permit from a machine and displays it in the window of the vehicle

PCN	Penalty Charge Notice	A fixed penalty notice issued by a CEO, backed with powers to obtain payment by civil action
PML	Parking Matters Ltd	The consultant carrying out this study
RFID	Radio-frequency identification	A system using electromagnetic fields to automatically identify and track tags attached to objects. The tags contain electronically-stored information. Oyster cards and contactless credit/debit cards are examples of this type of system
SAE	Society of Automotive Engineers	A U.S.-based, globally active professional association and standards developing organization for engineering professionals in various industries. Principal emphasis is placed on transport industries such as automotive, aerospace, and commercial vehicles
STC	Smarter Travel Choices	Travel behaviour change initiatives including providing better travel information to reduce single occupancy vehicle use
STP	School Travel Planning	A range of initiatives which seek to reduce car-use to schools and increase walking, cycling and bus use
TC	Town Councils	The third tier Town Councils in place in both of the District's towns
TRO	Traffic Regulation Orders	The legal instrument used to enforce on-street traffic and parking restrictions
TSRDG	Traffic Signs Regulations and General Directions	The law that sets out the design and conditions of use of official traffic signs that can be lawfully placed on or near roads in Great Britain and the Isle of Man.
UWE	University of the West of England	A university known for research into travel and transport behaviour
VRM	Vehicle Registration Mark	The mandatory alphanumeric registration mark of a vehicle, displayed on a vehicle registration plate
VRP	Vehicle Registration Plate	The DVLA assigned registration plates that vehicles must display when being used.

Breckland Car Park Strategy

Appendix 1 – Wider Parking Context

Contents

5. Wider Parking Context

Parking Matters Ltd (PML) have been commissioned by Breckland District Council (the Council) to provide input into the Council's review of parking strategy in the district.

This Appendix supplements the Main Report and sets out in more detail the wider context surrounding parking, including, technology, electric vehicles, town centres, and the case for reasonable charging and control regimes, drawing out how current trends are relevant to Breckland District.

1.1 Recent and future changes in parking

Societal and demographic change, together with technological innovation, is transforming the way people work, spend their leisure time, travel and shop. Cars will increasingly be 'connected', and drivers will expect their car or app to find and pay for their parking automatically.

The expansion in the number of electric vehicles, connected cars and, in the longer-term, introduction of autonomous vehicles will create both challenges and opportunities for parking services and transport managers. The impact on the demand for both parking and parking services needs to be planned for in the context of a climate emergency and an urgent need to reduce the impact of cars and congestion on high levels of air pollution.

Figure 10. Intelligent Transport Systems (ITS) and Parking integration

The way that the public expects to pay for parking is also changing. In most instances parking is a relatively small spend and, prior to the Covid-19 outbreak, cash remained the most common method of payment. However, the use of contactless payment in society has been growing quickly, spurred on by banks looking to optimise operational efficiencies and a growing customer confidence in and familiarity with this technology. This, and the increasing popularity of apps such as Apple Pay, Android Pay, PayPal, etc along with parking payment apps such as RingGo and PayByPhone, means

that drivers increasingly expected cashless solutions to pay for their parking. For the operator cashless payment enhances operational efficiency, provides valuable data opportunities, and removes the potential for theft.

1.2 Changing Town Centres

Town Centres are changing. Those that are retail-based are often facing a challenging economic environment. Parking must respond to the re-vitalisation of town centres as places for people, leisure, and enjoyment, with appropriate tariffs and time limits[2]. Car parking is only one aspect of a complex interplay of factors influencing willingness to travel to town centres, as shown in Figure 2.

Figure 11 - Factors influencing the success of a town centre (Re-Think! Parking on the High Street Report)

There are often calls for reduced car parking charges, however this may result in the negative aspects of a poorly managed parking estate without the desired uplift in visitors, and a reliance on other revenue streams to maintain and invest in the parking facilities. With denser development trends come demands for more diverse town centres; places that offer the benefits of higher densities including diversity and freedom, cultural experience, convenience and places to meet and enjoy.

For a successful future, Breckland district needs to attract visitors, shoppers and employers to its towns. Changing customer expectations and the changing role of technology provide both opportunities and threats, as connected vehicles help users to make more informed choices about their destinations.

1.3 The role of a Parking Strategy

A well-managed car parking estate with reasonable tariffs is important to local communities, helping residents and visitors to access businesses and services and to support local economies. As stated in the Welsh Government's report on the Impact of Parking Charges on Town Centres, 2015 "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

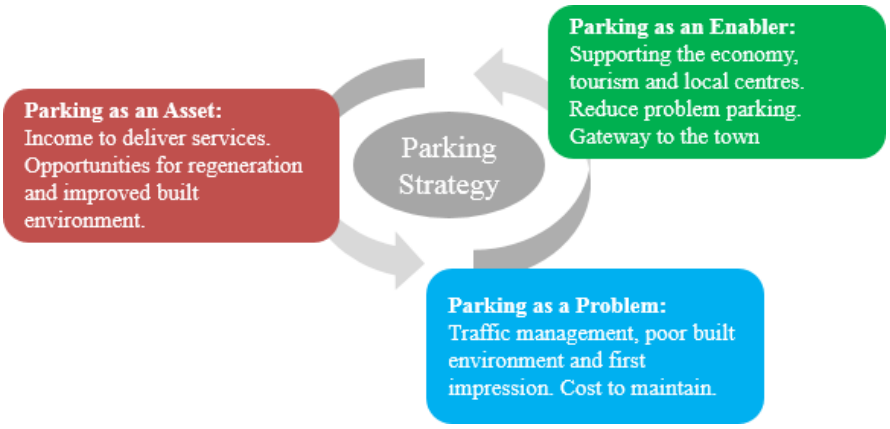
[2] Springboard. 2013. Re-Think! Parking on the High Street Report

changes to car parking strategies is not available… Charging for car parking is one of a complex array of factors that can influence town centre vitality."[3]

For local authorities, off-street parking is an important asset providing a tool for town centre management and revenue to deliver important services within the limits set out by national legislation[4].

Poorly managed parking assets can have a detrimental impact on how towns and cities look and function (Living Environment domain); encouraging traffic, contributing to a poor townscape, exacerbating air pollution and poor health (Health and Disability domain), linked to inequality (Income and Employment domains). 'Cruising' for parking can generate vehicle mileage as users search for spaces, generating congestion and contributing to emissions[5]. Figure 3 illustrates how a parking strategy should work to achieve a balance between economy, townscape, income and sustainability.

Figure 12. Balancing competing Parking priorities for towns



1.4 Climate Change and Air Quality

As evidence increases that humanity is facing unprecedented global climate change, many local authorities, including Breckland, have responded by declaring a Climate Emergency. There has been a range of initiatives by councils around the UK and mainland Europe to cut congestion and emissions.

Carbon reduction targets will require parking policy and management to play a key role in delivering solutions to reduce emissions and to encourage the use of low emission vehicles. The change from a carbon and car-based economy to a low carbon one is likely to see a change from a car ownership to a car sharing model with mobility rather than ownership as the key. Changes are likely to occur gradually, and the Council must manage and facilitate the transition while maintaining and improving the economic vitality of the district.

[3] http://www.senedd.assembly.wales/. Impact of Parking Charges on Town Centres, 2015

[4] British Parking Association. August 2011. Parking Practice Notes, p10. http://www.britishparking.co.uk/write/Documents/Library/ppns/PPN1%20-%20Charging%20for%20Parking%20-%20Aug%202011.pdf

[5] Shoup, Donald. 2007. Cruising for Parking. http://shoup.bol.ucla.edu/CruisingForParkingAccess.pdf

The UK stands at the beginning of the journey to a low carbon sustainable future which will inevitably look vastly different from the established norms of today's society. However, as Peter Jones, professor of transport and sustainable development at UCL said "There is no consensus – we are in a time of experiments as we redefine what is important to our lives in cities and towns."

Digitisation of parking services will make a major contribution to sustainable mobility. It will facilitate a more efficient parking experience. Drivers will be directed straight to their parking space with a significant reduction in circulating traffic searching for a place to park along with the consequential reductions in congestion, emissions and wasted fuel. Technology allows the possibility of widespread car sharing with the potential to reduce congestion levels.

Parking services in modern, connected and sustainable towns and cities will be expected to provide real-time digital information to travellers to inform parking and transport decisions in advance of, and during, any journey.

1.5 The Impact of Car Park Tariffs and Charging

Car park charges are often perceived, particularly amongst businesses, as being a key determinant of changes in footfall levels in town centres. Over three-quarters of the business owners/workers interviewed for the Welsh Government research suggested that car parking options have an impact on the number of people coming into the town centre and therefore on their custom[6].

Beyond the anecdotal, there is very little published evidence which links changes in car park charges to changes in town centre footfall. Most research generally concludes that visitors feel the general availability of spaces to be more important than cost in their overall decision about visiting[7].

Re-Think! outlines research into the impact of the number of spaces and the cost of parking for the first two hours on the prosperity of town centres. A two-hour duration was chosen to separate shopping trips from commuter trips. The study did not consider any other factors relating to car parking that could have an impact on the performance of town centres, such as location of parking and the quality of the space.

The Re-Think! report found that whilst there is a link between the quantity of parking and footfall, this suggested that the level of provision in town centres is generally where it should be rather than that increasing available parking would increase footfall. It also concluded that the relationship between the cost of parking and footfall is less clear. Business owners believe that as cost increases, footfall decreases, but as shown below, the towns/cities, with the highest footfall generally have higher than average parking charges.

[6] http://www.senedd.assembly.wales/. Impact of Parking Charges on Town Centres, 2015
[7] Atkins. The effect of Parking Policy in England: Stage 1 Final Report

Figure 13: Source, Springboard Research Ltd and Parking Data & Research International

Whilst towns with lower footfall generally charge less for parking this does not suggest that raising parking charges will increase or decrease footfall but implies that the cost of parking in the town centre is a lower priority when deciding on a destination than other factors. This is further evidenced when comparing the quality of the offer with footfall: put simply, as the quality of the offer improves footfall increases.

The study does appear to find a link between a reduction in footfall in towns that charge more than the national average for the quality of their offer, however there are so many other variables, including the priorities of authorities in setting their charging regime, that it is difficult to draw any conclusions from this aspect of the research.

In-depth research at the Department of Urban Transport Economics, Erasmus University of Rotterdam shows no statistical correlation between footfall and parking charges:

"Visitors to town centres suggested that car park charges do impact behaviour, but the general availability of spaces is felt to be more important than cost in their overall decision about visiting. Traffic flow and parking signage have as much, if not greater, an effect on their decision to visit the town centre, how long they spend there, and how much money they spend."- Association of Town & City Management

This view is further supported by a 2012 London Councils Report on the relevance of parking to the success of urban centres[8]. Whilst London specific, the report supports the view that whilst research is scant, most of the evidence suggests the link between pricing and vitality of high streets generally correlated towards higher value destinations having higher tariffs and that if anything, traffic levels are frequently cited by shoppers as detrimental to the experience of town centre shopping.

The relationship between parking and local economies is complex, as provided by research conducted for the Renaissance Market Towns Programme. The report concluded that:

"People are drawn to towns, or away from them by other factors, such as place of work and the quality of the shopping facilities and public spaces. Therefore, a town with good shopping facilities and some parking problems will continue to

[8] London Councils. November 2012. Relevance of Parking to the Success of Urban Centres http://www.londoncouncils.gov.uk/services/parking-services/parking-and-traffic/parking-information-professionals/review-relevance

attract shoppers, despite the poor parking, whilst a town with ample, good parking but a limited shopping facilities will not attract shoppers" - Renaissance Market Towns Programme, 2007

Other than in private car parks (e.g. NCP), Councils control the availability, duration and cost of car parking. In two-tier systems, Districts generally have more control over off-street parking than any other aspect of transport policy and management[9].

Crucially Councils are rarely in control of the charging rates set at out-of-town developments. These are often free, and shopping centres are often designed to make shopping as easy as possible for people travelling by car. These discrepancies between in-town and out-of-town retail offerings are often blamed, particularly by the business community, for decreasing footfall and revenue in town centres.

Re-Think! discusses the need to look at the 'value' of a space as opposed to simply the 'cost'. Drivers expect to pay more in the centre of a town than in an out-of-town location with the diverse range of services and cultural attractions available in town centres as opposed to a purely shopping and eating offer in most retail parks.

To summarise, there is a general consensus that parking is just one of many factors in city and town centre vitality and there is little evidence to suggest that parking charges alone are a significant factor in destination choice.

1.6 Spend and Mode of Travel

Within the town centre and high street context, there is a consistent tendency to underestimate the number of people shopping by modes other than car as well as their spending habits.

The London Councils report and research by Sustrans through interviews and primary research in Graz, Bristol and Camberwell found that retailers overestimated the importance of car travel in how their customers arrive. Whilst these examples are in large urban areas, they do demonstrate consistent results.

Figure 14: Spend and mode of Travel in Bristol, UK, Sustrans

[9] Springboard. 2013. Re-Think! Parking on the High Street report. http://www.britishparking.co.uk/write/Documents/Re-thinking_Car_Parking.pdf

6. Specific parking policies

In this section we set out some specific policy options, for example, Sunday and Blue Badge charging, and the evidence and knowledge from the rest of the UK and beyond that can inform your decisions.

2.1 The Role of Electric Vehicle Charging in Car Parks

The term Electric vehicle (EV) is used to denote a 'plug-in' wholly electric or hybrid vehicle capable of running under battery power. Past and current governments have supported measures to encourage uptake of EVs as they can contribute to a wide range of transport policy goals. In November 2020, the Government announced that it would ban the sale of petrol and diesel cars from 2030, and hybrids from 2035. Despite recent debate on how to achieve the transition to net zero, this remains the position and the proposed Zero Emission Mandate should support this aim by placing incremental requirements on car manufacturers for EV sales from 2024.

As a result, EV ownership and usage are growing. Latest figures (August 2023) show sales of EVs representing 23.2% of car sales in 2023 to date, compared with 3.1% in 2019 (source SMMT).

The advantage of EVs is in better local air quality and reduced engine noise. However, they do nothing to tackle congestion, traffic severance, or reduce reliance on cars, and their global environmental performance depends on their manufacture and how the energy to power them is generated. Like conventional cars EVs also emit particulates, this comes from brake, tyre, and road surface wear and with advances in cleaner engines, they now exceed tailpipe emissions[10].

Many local authorities have used Government capital grant funding to support initiatives for EVs, most commonly EV charging points. There has been a tendency to install these in council-owned car parks as they provide the simplest and quickest route to delivery. But usage of these networks is low but growing. Two main reasons for this are a perception of reliability (points are often out-of-service); and the second that at present EV drivers largely charge at home (if they have the facility to do so) as it is cheaper and more convenient. Local authority car parks may not necessarily be the optimum places for EV charging infrastructure and councils must consider their placement and how the ongoing revenue costs needed to support EV charging networks are to be met.

Forecasting future demand for electric vehicle charging stations in car parks is complex and difficult. EV technology is changing rapidly as car manufacturers try to improve the usability of their products. New designs have a greater range and use faster charging technology. There are other potentially disruptive technologies (in-road induction, hydrogen powered vehicles, etc) that will emerge over the next 10 years.

There is uncertainty as to how many charge points are needed (what speed they should offer and where they should be located) although there is general consensus that more and more reliable chargepoints are needed to support the number of EVs forecast to be on the road in the future.

2.2 Changing Technology

Technological advances including new data services that supply transport information to the user or operator are developing quickly and can assist efforts to manage congestion. To provide the services that new technologies can offer (and which at least the younger generation is increasingly expecting from operators of parking services) local authorities must adapt and work in collaboration with service providers.

[10] Prof. Roy Harrison OBE, FRS, https://www.theengineer.co.uk/electric-vehicles-and-particulates/

Managing the challenges of congestion and air quality effectively will require parking service providers to encourage public acceptance and adoption of innovation and new technology to enable the delivery of parking solutions and services that can help improve these issues. It is essential that parking providers place the public at the heart of everything they do and ensure that they are designing services that are useful and beneficial.

The British Parking Association (BPA) published a 'Blueprint for Parking 2017-2021' calling on the government to remove the uncertainties surrounding new technology and encourage innovation in parking policies and standards to improve the delivery of parking services. The BPA's objectives for the next five years which hold true today include:

- Improving everyone's understanding of why parking is managed – parking management is a service to protect spaces for residents and people with disabilities on high streets, in town centres, on housing estates, in business parks, in shopping centres and in leisure centres – all of these would become congested and inaccessible if parking remained unmanaged. Good regulations and sensible management help revitalise the high street, and support residents, motorists, and businesses.
- Encouraging professionalism and continuous development to raise standards by continuing to develop apprenticeships, qualifications and professional development issues.
- Developing parking policy to ensure fair use of parking facilities and services – improve access to facilities for all to ensure equality and allow parking service providers to find out who is using their facilities fairly and in accordance with the law.
- Improving consistency in the way that parking services are being managed and delivered by local authorities by influencing parking policy, ensuring that they continue to support towns and high streets and prevent confusion for the motorist.
- Connecting emerging technology to parking and people's mobility aspirations using methods including campaigning for new parking policy and standards so that parking and traffic management can deliver a better customer experience.
- Supporting and encouraging investment and innovation into sustainable products and services – promoting use of technologies to improve drivers' ability to locate available parking spaces, thus reducing circulating traffic, shortening journey times and reducing congestion; integration with public transport and the installation of electric vehicle points; the use of ANPR (automatic number plate recognition) and other technologies.

The success of such an approach will require changes to the perception of the parking sector by the public and the media, by presenting the sector in a positive way and opening people's eyes to the necessity for and the benefits of effective parking management. This will need a positive parking agenda with a focus on parking management rather than parking enforcement. Communication will be key, ensuring that the public fully understands the rationale and benefits behind any policy decisions.

2.3 Limits on the use of ANPR technology

ANPR technology is widely used for parking management in the private sector and by local authorities in other European countries. However, current UK legislation enables UK authorities to use ANPR in a limited manner only (for example near schools or for moving traffic offences).

The issue is that the Protection of Freedoms Act 2012 deals with the statutory rights in relation to the recovery of parking charges from the registered keeper. Schedule 4 sets out that the Act applies only to 'relevant land' which excludes (amongst others) a parking place which is provided or controlled by a traffic authority. A parking place is defined in S32(4)(a) of the Road Traffic

Regulations Act 1984 as a place where vehicles, or vehicles of any class, may wait. As Council owned car parks have already been provided and designated as car parks, it would appear that they would be treated as parking places in law and therefore even if they are leased out would not be 'relevant land' under POFA so the keeper may not be held liable for unpaid parking charges. On this basis issue of PCNs in the post would not be possible removing one of the compliance benefits and major cost efficiency opportunity available to private sector operators compared with the public sector.

The government's restriction on the use of ANPR was seemingly based on the premise that enforcement by local authorities using ANPR was unduly harsh. Elsewhere cities across Europe and North America have successfully introduced digitised systems based on ANPR surveillance. The result has been increased compliance, reduced numbers of penalties issued and increased revenue from payment of parking fees. UK authorities are now beginning to take advantage of the same technology within the constraints of the current parking legislation by using barriered systems that ensure payment before exit.

In the short to medium term, the increase in the number of connected cars will ensure that motorists have sufficient information and opportunities to park in a compliant manner. It is to be hoped that this will convince legislators to revisit this question and permit the appropriate use of technology to provide efficient identification and enforcement against non-compliant vehicles.

2.4 The Importance of the Acceptance of a Variety of Payment Methods

The use of electronic payment methods (including contactless at the parking facility and payment by app) are already of increasing importance. The Covid-19 pandemic resulted in a shift away from cash.

Creating convenient alternatives to cash is an essential pre-requisite for any parking operator that aims to reduce or remove cash payment. For the customer, the need to carry change for cash payments can be increasingly inconvenient. Where coins are accepted car park operators need to securely collect and process the income at a cost to the operation and maintain the machines. There is also the risk of break-ins to payment machines with a potential loss of income.

Whether, or to what extent, to accept cash, is an important customer-service consideration which needs to be balanced against the costs of doing so. Customers expect to be able to pay for services as seamlessly as possible, using new technologies where appropriate, and want a quick and effortless service.

7. UK Case Studies on tariff and charging initiatives

There are a number of examples of town and cities across the UK that have altered their parking structure depending on the type of user group (commuter, shopper, etc) and the times that they arrive and depart. The issue with these schemes is that generally there is no reliable base data to measure their impact.

3.1 Tariffs to change behaviour

Cambridge City Council introduced new charges as part of the Council's plan to reduce congestion, air pollution and carbon emissions. The changes included a charge to encourage drivers to switch to other modes of transport between 8 a.m. and 10 a.m. Parking between these times attracted an additional tariff of 50p per hour for every hour (or part hour) of stay. At the same time the Council ended a trial that saw prices on Mondays and Tuesdays reduced.

Colchester is one example where a special offer was introduced targeted at commuters arriving before 8 a.m. and a further offer aimed at shoppers and leisure visitors to encourage them to shop during off-peak periods at certain car parks.

In 2010 Swindon Borough Council reduced charges for short stay parking in its car parks in an attempt to influence retail footfall. A report to the Borough Council's cabinet in 2011 sought to assess the impact of this reduction. Retailers in the main shopping centre, the Brunel Centre reported significant increases in footfall despite the overall occupancies in the town's car parks remaining unchanged. This suggested that car users converged on the more prime car parks at the expense of other car parks in the town and that retailers close to these other car parks may have suffered a commensurate loss in footfall. This case does demonstrate that changes in tariff may influence drivers' decisions on where to park but will not necessarily increase the overall number of visitors.

3.2 The Impact of Free Parking Schemes

From available research there is no reliable evidence that providing free parking to support local businesses and increase footfall will provide a successful outcome. There have been a number of historically recorded trials prior to the Covid outbreak when parking trends were easier to track and compare. Many of these trials only reported retailer feedback with no independent validation of footfall levels, but where footfall was recorded there did not appear to be material impact. Where retailers were consulted feedback on the impact was mixed. We provide a sample of reported case studies below:

In April 2006, for a trial period of 6 months free parking on Saturdays (after 10 a.m.) was introduced by Rotherham Borough Council in an attempt to improve retail footfall in the town centre. The subsequent town centre footfall figures were monitored by Town Centre Management and whilst they did show a small increase from 2005 to 2006, it was significant that midweek footfall had increased by 3.2%, although Saturday footfall has increased by only 2.95%. This data seemed to confirm that although footfall was increasing, the Saturday trial period did not seem to have added to the increase

In November 2014, in Ireland Mayo County Council abolished morning parking charges in Castlebar's two most central car parks but there was no dramatic change in retail activity.

To balance these examples, in Shrewsbury it was reported that free parking at selected car parks on Tuesdays and Wednesdays helped to increase year on year footfall by 2.2% during August 2019 compared with a 3.5% decrease across the West Midlands, a 2.3% decrease for other market towns and an overall 1.6% decrease across the UK.

A Vale of White Horse District Council report reported the impact of providing 2 hours free parking at locations in Abingdon, Faringdon, Wantage and Botley on businesses in these towns. 97 businesses responded to a survey undertaken in 2012, one year after the introduction of the scheme. The following responses were reported:

Approximately 70% of businesses reported a positive impact however only:

- 51% of business believed that the scheme attracted more people to shop in the town centre.
- 35% of business felt that the scheme increased the number of visitors to their premises.
- 45% of business felt the scheme encouraged shoppers to stay longer in the town, increasing customer spend.
- 44% of businesses believed that the scheme attracted shoppers into town centres who would have otherwise shopped in out-of-town retail parks and supermarkets; and

- 32% of businesses believed that the scheme attracted shoppers into town centres who would have otherwise shopped in other towns.

It is evident from these responses that many businesses perceived a benefit, there was no consensus that the scheme attracted more shoppers.

Businesses were also consulted as part of Free after 3.00 pm initiative in Elgin town centre in June 2015. Again many retailers did evidence increases in turnover, although there was no overall consensus with other businesses stating that they did not see any major changes.

Covid 19 had a dramatic impact on town centre footfalls and many Councils have implemented free parking initiatives to try and boost town centre visits and support businesses. For example free parking was introduced after 3 pm on Fridays in Dorking in February 2021 and was reported to have helped footfall to increase by 1.9% during these periods. However, no comparison was made for other days of the week to help understand the real impact. Whilst, following the relaxation of Covid restrictions, there have been other positive reports of footfall increasing (Hucknell and Ashfield) due to free parking initiatives, there have also been footfall increases in towns where parking charges have been maintained, making it extremely difficult to measure the true impact of the free parking trials.

From 2019 to 2021, Fife Council trialled free parking days, the removal of Sunday charges, “free after three” evening discounts and cut-price season tickets in a bid to improve town centre footfall. However council officers concluded that these measures were not providing enough of a positive impact alone to justify the financial cost taken to enable them. The council’s transport director reported that “the biggest lesson we learned is that car parking is secondary to the wider placemaking and town centre strategy approach. That's the way for the future, as opposed to looking at car parking as some form of silver bullet.”

The examples given above widely support the research detailed earlier that there would appear to be no statistical correlation between footfall and parking charges. Given that the provision of free parking comes at a cost to council budgets, the lack of clear evidence of a resultant material increase in footfall, represents a considerable risk to the implementation of free parking schemes.

3.3 Discount or Incentive Schemes

The emergence of payment platforms integrated with Council systems will allow businesses to create and register apps for their own or their customers’ use. These will enable the businesses to pay, or part pay for customers’ parking without having to engage with the Council or use complicated vouchers or cards at payment machines. Businesses would also be able to create schemes that pay for customer parking in advance (e.g. “free parking for local customers this weekend”).

3.4 Blue Badge Concessions

The Government’s rights and responsibilities leaflet, issued with a blue badge, states that the purpose of the blue badge is to help a disabled person to park close to their destination, either as a passenger or driver. The leaflet also states that “...the badge is intended for on-street parking only”.

Many disabled people and groups do not understand the rationale for making off street disabled parking free, the important element being that spaces are made available in convenient places. The argument that disabled people tend to be on a low income therefore should benefit from free parking, is criticised by a wide range of organisations and groups who argue that, using the same logic, other low-income groups should also be able to park for free.

The issue becomes more complex if 'hidden' disabilities (such as autism and dementia) are considered.

Disabled Motoring UK's (the largest UK charity specialising in the mobility of disabled people) policy position is that Blue Badge holders should be able to park for up to three hours free of charge in off-street car parks. They argue that that the same free parking concession should apply in car parks as it does on-street e.g. three hours free parking and when car parks charge it encourages more badge holders to park on the street which is more dangerous and could possibly cause traffic problems.

Some councils do however charge disabled users for example, Plymouth, Newcastle and Exeter. Others such as Cornwall and Rushmoor limit free parking to automatic Blue Badge holders with most need (automatic qualification is available if holders are receiving certain mobility benefits). Disabled Motoring UK feels this is confusing and unfair as it discriminates against people with equivalent needs who for some reason may not qualify for these benefits.

Examples of other councils' justifications for charging include tackling abuse and helping to fund services such as Shopmobility.

3.5 Tariffs for local residents/Resident Cards

Some councils offer residents discount schemes for car parks and other services.

- City of York Council - the Minster Badge in York currently offers residents who own a vehicle, various discounts on parking charges in its car parks and the badge allows free parking in some car parks and the on-street parking bays after 6 p.m. The badge costs £20 to cover administrative costs and is valid for 2 years. In 2017/18 only 6% of paid car park transactions were from Minster Badge holders.
- Royal Borough of Windsor & Maidenhead – until April this year the Advantage Card administered for residents offered parking discounts and wider benefits including reductions on local leisure destinations and retail outlets including Legoland, Royal Windsor Racecourse and the Borough's leisure centres. An estimated 80% of the Council's population are owners of the card. The card is free for residents. Free entry is also available to all public areas of Windsor Castle In terms of parking cardholders could gain discounts of up to 50% during daytime hours and evening parking was free in most car parks. Following a review, the Council recognised that the 50% concession was higher than some other local authorities and have now moved to a new resident parking discount scheme administered by RingGo, offering an hour's free parking in a selected car parks in each town in the borough.
- London Borough of Hilingdon offer a "Hillingdon First" smartcard to residents which allows limited free and discounted car parking both on and off-street.

It is clear that these types of concession are more popular if linked to a number of activities and could be considered as part of a wider marketing strategy to attract more footfall to the Borough's towns and villages. When limited only to parking, they simply act to reduce parking tariffs when there is no clear evidence that will impact town centre footfall or that there is demonstrable demand for their use. They can be beneficial however in locations where there is significant seasonal traffic to manage and deter via higher parking charges, without impacting local residents who have access to reduced rates.

3.6 Using Tariffs to encourage use of cleaner vehicles.

The need to reduce emissions and improve air quality is a key driver for the Borough. Some authorities have implemented or are considering low or zero emission zones as a radical way of reducing NO_2 and improving air quality in their city centres.

Phone payment apps are a practical way of offering reduced tariffs to encourage the use of low emission vehicles in the Borough. For example, RingGo offers an Emissions Based Parking (EBP) service using vehicle registrations, combined with information from the DVLA, to automatically vary parking tariffs, based on the emissions of the vehicle being parked. Payment by licence plate at parking terminals would also allow this functionality as vehicle registrations would also be captured.

In September 2023 Bath Council introduced variable-rate car park charges based on emissions in their car parks. Charges for the most polluting diesels rose by 47%, all petrol cars with over 131g/km CO2 emissions saw an increase, and the Council estimated that 66% of users would see increased charges.

8. A look at the future

Over the next 10 years there will be significant changes in the functionality of vehicles using the Council's car parks as well as the manner in which customers will find, access and pay for parking. These changes are likely to occur in three time periods (years are approximate and see note on vehicle age below[11]):

4.1 Now – 2028:

Increasing use and integration of mobile payment

Many drivers already use their smartphones to locate car parks and there are an increasing number of apps that can be used to reserve and pay for parking. Vehicle manufacturers now include similar functionality in their in-car information and navigation systems.

The pandemic and the current cost of living crisis had a number of influences on vehicle trends. Two key effects were:

- A significant increase in the use of electronic payments with a significant uptake in the use of contactless payment, as an alternative to cash, and a greater use of smartphone apps.
- A significant downturn in brand new vehicle sales. This will have a lasting effect as new vehicles tend to have the capability of locating and paying for parking. Fewer sales will mean that new in-car features will take longer to establish.

The use of smartphone and in-vehicle systems is currently hampered by the way in which authorities are contracting with pay by mobile suppliers. However, the National Parking Platform (NPP) initiative (sponsored by the DfT and piloted by a number of authorities across the country) is designed to address this issue through multi-vendor payment and thus enable customers to pay for parking using a wide range of payment apps. Where the NPP has been piloted, the uptake of these methods has increased significantly. By 2024 the NPP is likely to become a vital part of the nation's parking infrastructure and the Council should consider this option as soon as is practicable.

[11] Currently, the average age of a UK car is approximately 8 years (see SMMT 2017 Automotive Sustainability Report). As a result, it is likely there will not be significant numbers of connected vehicles until the end of the first period and they will only form the majority from 2025. However, Government policy (for example on emissions) may result in scrappage schemes or other incentives to purchase electric vehicles. This would significantly increase the rate of market penetration for the other features described.

Electric Vehicles

Whilst overall vehicle sales are low, the proportion of new electric and plug-in vehicles has reached 18% of all sales. Whilst this is still a small proportion of total vehicles in use (around 3%), the demand for chargepoints is increasing.

Introducing autonomous driving

The major vehicle manufacturers are piloting Automated Valet Parking (AVP) in a small number of car parks in Europe. The necessary technology is already embedded in some production vehicles and is likely to become common soon, however car parks will need specialist equipment to control automated driving.

4.2 2028 – 2033 Vehicles park themselves and handle the payments

The majority of vehicles will be connected, with significant numbers of users delegating to their car the task of finding, reserving and paying for parking and then guiding them to the space.

Cars with AVP will become common, bringing a potential demand for AVP equipped car parks. This will create new challenges for car park operators as “drop-off” and “pick-up” areas will bring design and operating changes.

Operators may also find that there is an increasing demand for reservation and pre-payment for off-street parking.

Increasingly, customers will expect the availability of off-street parking to be published digitally. New technology is emerging that will enable the use of street CCTV to gather data on occupancy and predict future availability.

EV chargepoint availability will become more important for drivers, creating a demand for information on location and operational status to be available digitally.

4.3 Beyond 2033

There will be an ever-increasing number of cars with autonomous driving features during this period, however it seems likely that ‘truly’ autonomous vehicles i.e., those that need no driver intervention under any circumstances will not appear in any numbers before 2040. There may also be a significant change in the way these vehicles are owned (with many customers using shared vehicles rather than owning their own car). Most predictions, however, relate to city-based scenarios. No studies focus on semi-rural locations or take the needs of specific users (such as caravanners) into account when considering autonomous cars, their ownership and use.

From a parking point of view, the introduction of autonomy may result in the need for fewer car parks (as users share vehicles, they will be less likely to be parked) or car parks that resemble storage areas (i.e., with no walkways and fewer aisles) that can contain a higher density of vehicles. However, based on the current studies these questions would not be key to the Council’s policies until the 2040s at the earliest.

Breckland Car Park Strategy

Appendix 2 – The Base Case

Contents

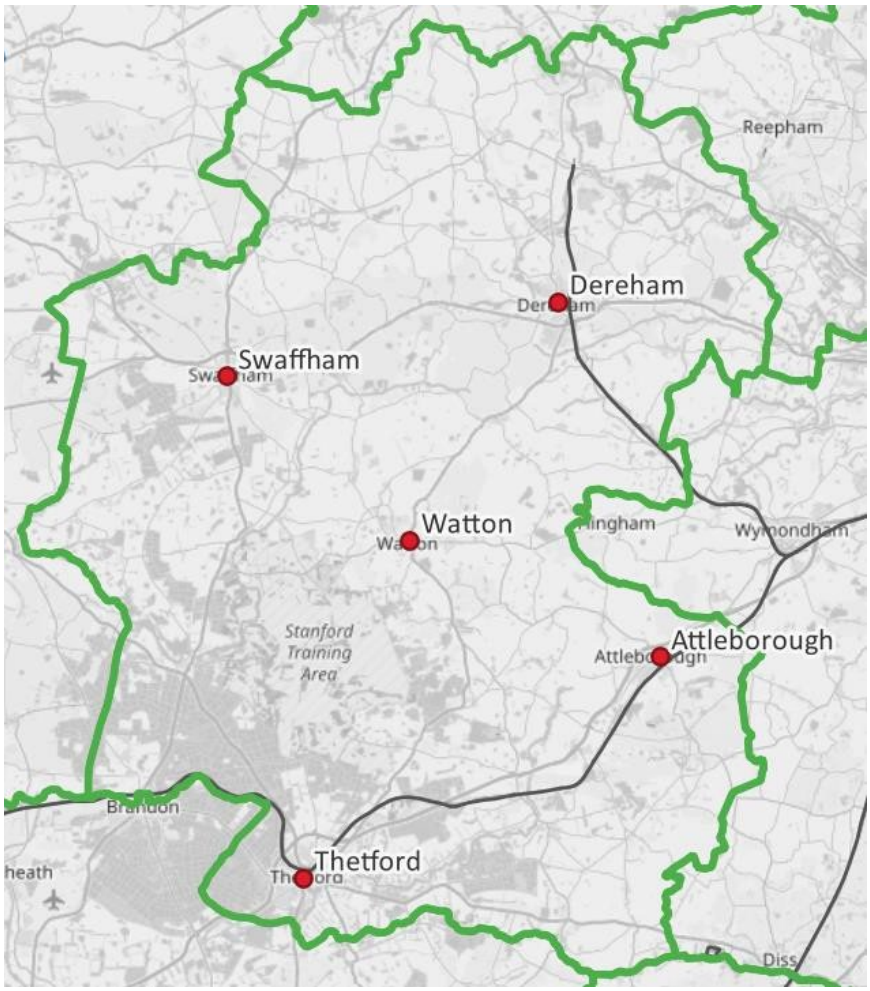
9. Breckland District

Parking Matters Ltd (PML) have been commissioned by Breckland District Council (the Council or BDC) to provide input into the Council's review of parking strategy in the district.

This Appendix to the Main Report summarises the technical work undertaken to establish the 'Base Case'. It considers the district and its towns' characteristics and policy, interprets the car park survey results and benchmarks tariffs against comparative towns. We also consider the key policy documents adopted by the District and County.

A wide variety of different factors impact the type of parking policies which can or should be employed to manage parking. For example, a low population density which makes conventional public transport harder to provide and results in a reliance on travel by cars.

Figure 15. Overview map of the district



5.1 Understanding the District

Breckland is classified as the most rural type of rural district (R80) in the Office of National Statistics (ONS) Urban / Rural classification alongside Babergh, Fenland and other council areas in the East, South West and North West of England. 100% of the population are classified as being rural, with 33% living within its market towns.

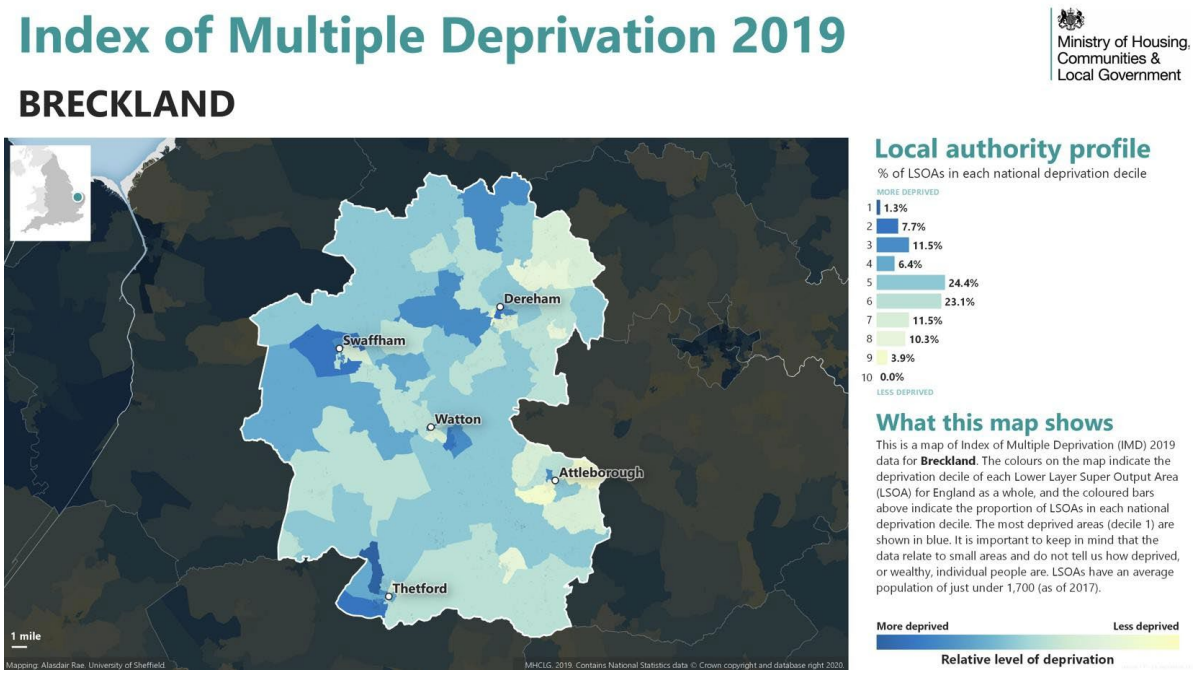
Figure 16. Urban / Rural population split

Name	Breckland	
Region	East of England	
District Code	33UB	
Total Population	121,449	100%
Major Urban Population	-	0%
Large Urban Population	-	0%
Other Urban Population	-	0%
Total Urban Population (excluding Large Market Town population)	-	0%
Large Market Town Population	39,643	33%
Rural Town Population	29,299	24%
Rural Town Population (including Large Market Town population)[2]	68,942	57%
Village Population	38,436	32%
Dispersed Population	14,071	12%
Total Rural Population (including Large Market Town population)	121,449	100%
Rural% (including Large Market Town population)	100.00	
Classification	R80	
Numerical classification	6	

Breckland ranks 182nd in the Index of Multiple Deprivation (IMD), again placing it in the middle of local authorities in England, but there are pockets of deprivation including LSOAs E01026467 and 77, both in Thetford, which rank lowest in the district and 4,298th and 4,457th in the county, with a small area within the most deprived decile.

The average house price in Breckland was £250,000 in 2021, 187th highest of local authority areas, so within the 5th decile or about half way. In common with the rest of the county, house prices have risen sharply in recent decades.

Figure 17. IMD Map. Credit MHCLG



5.2 Travel to work Data

Travel to work data provides context for the commuting and vehicle usage habits of residents. The 2021 Census was heavily impacted by the Covid19 pandemic which saw a sudden spike in working from home due to movement restrictions. As a result work from home rates are much higher than in the previous census. Unofficial data[12] shows the number of people still working from home at least one day in the last week has reduced from a peak of 46% in March 2020, but remains at 39% and is reasonably stable.

Figure 18. Travel to Work, mode of Travel, 2021 Census, ONS

	Home	Metro	Train	Bus	Taxi	Cycle	Car Driver	Car Passenger	Bicycle	On foot	Other
Breckland	21.9%	0.0%	0.3%	1.1%	0.3%	0.5%	59.7%	4.8%	1.8%	8.5%	1.1%
East of England	31.9%	0.6%	2.3%	2.0%	0.6%	0.5%	47.7%	3.8%	2.3%	7.3%	1.0%
England & Wales	31.2%	1.8%	1.9%	4.2%	0.7%	0.5%	45.1%	3.9%	2.0%	7.6%	1.0%

Breckland has higher rates of travel to work by car driver and passenger than the East of England or England and Wales, reflecting its rural nature. Home working impacts on parking patters through higher pressure on residential roads and a significant reduction in commuter parking at railway stations and in city centres.

5.3 Access to Car and Vans

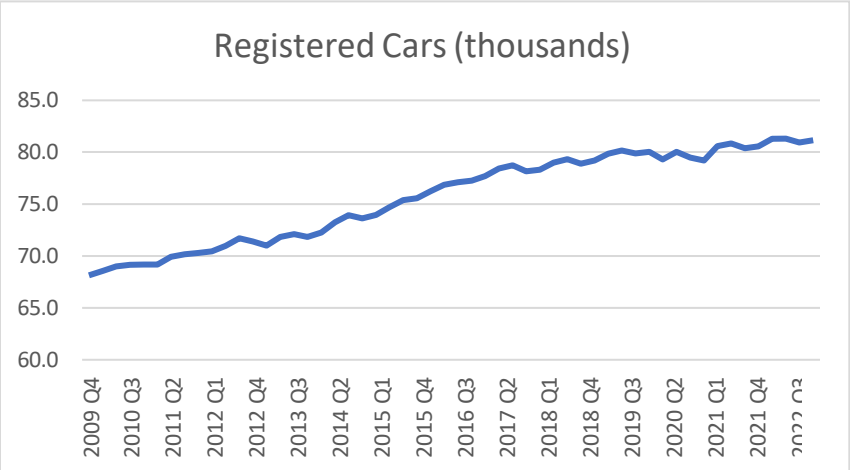
There are high levels of vehicle access for households in Breckland reported by the 2021 Census.

Figure 19. Access to Car and Vans, 2021 Census, ONS

Area	None	1	2	3 or more
Breckland	13%	40%	32%	14%
East of England	17%	42%	30%	12%
England and Wales	23%	41%	26%	9%

Driver and Vehicle Licensing Agency (DVLA) data shows a steady increase in the number of cars registered on the Districts' roads.

Figure 20. Registered Cars (private and company), DVLA, 2023



[12] https://www.statista.com/statistics/1207746/coronavirus-working-location-trends-britain/

5.4 Public Transport Provision.

There is a secondary rail line which runs between Ely and Norwich and services stopping at Thetford and Attleborough.

Express branded bus services from Peterborough to Norwich serve Swaffham and Dereham (Kings Lynn and Wisbech) and run regularly throughout the day including early morning and into the evenings (last bus 22:50 from Norwich to Dereham).[13]

Two route 81 services a day link Thetford and Watton. Watton is also served by the 6 which provides links west to Norwich each hour until 19:35. There are fewer regular services to Swaffham and irregular services to other destinations including Ashill and Litcham.

Overall, east-west links are fair, and in our experience better than many equally rural districts but north-south links are poor, leaving many with little alternative than to drive for shopping, work, services and seeing people.

5.5 Summary

The rural nature of the district combined with limited public transport options results in high travel to work by car and car ownership. This will create increasing pressure on both on and off-street parking. On the other hand, with a significant portion of the workforce working from home, there may be a reduced demand for traditional commuter parking spaces in the town centres and at employment hubs. This could lead to an oversupply of parking in some areas.

The district might consider adapting parking policies to accommodate the changing nature of work. If charging is brought in, this could involve offering more flexible parking arrangements, such as part-time parking permits or pay-as-you-go options for those who only commute on certain days.

Beyond parking, recognizing the sustained trend of remote work, policymakers may consider supporting infrastructure that facilitates remote work, such as co-working spaces in suburban areas. This can reduce the need for long-distance commuting and associated parking requirements.

Continuously monitoring travel-to-work data and other relevant metrics through payment terminals or monitoring equipment, would help policymakers make informed decisions about parking policies. Regularly updating strategies based on evolving work patterns.

The Strategy will need to balance the requirement for many to travel by car, given the rural nature of the district and the low density of bus services, with a desire to reduce traffic and promote use of single occupancy vehicle alternatives.

[13] https://www.firstbus.co.uk/sites/default/files/public/maps/FEC-XL-excel_A_B_C_D-Bus_Times_from_14-05-23_Upd08-23.pdf

10. Local Policy and Previous Studies

There are a number of important policy documents and previous studies which should be considered with regards to planning and transport policy, as well as parking reviews undertaken in 2012 and 2015. These are considered below.

6.1 The Norfolk Local Transport Plan (LTP) 2021 - 2036

The LTP recognises the changing world of transport technology and the implications that this may have for parking, including connected vehicles and self-parking. The table below includes relevant references to car parking from the LTP and the implications for the Breckland Parking Strategy.

Figure 21. Summary of key relevant parking points in the LTP

Local Transport Plan	Implications for Parking Strategy
Problem: Congestion, high levels of non-bus traffic, cheap parking and lack of bus priority in urban areas make it difficult to make public transport an attractive alternative to the car.	Consider management of parking through tariffs and regimes.
Policy Streetscape, spacing and infrastructure design for (including for electric infrastructure e.g., charging, parking, signposting) will need to take account of accessibility for all including those with reduced mobility or disability	Consider implications of regimes for those with reduced mobility.
Policy: Consider the implications of banning parking on pavements. This can be a particular problem in narrower streets with parked vehicles blocking pedestrian routes.	Consider impact of the banning of pavement parking for off-street car parks, especially those in residential areas.
Policy: Other areas have introduced schemes such as congestion charging or levying a charge against parking places at workplaces in urban areas. The revenue from this type of measure can be reinvested in transport. We are already reinvesting revenue generated from on-street parking charges back into transport.	Consider the policy implications for revenues to help deliver other council objectives, within the limits of the legislation.

6.2 The Local Plan

The Breckland Local Plan was adopted on 28 November 2019. Section 3.36 onwards sets out the context policy for residential parking:

3.36. In terms of trip destination and commercial development there is more scope to manage travel patterns and reduce parking vehicle provision. Here the accessibility by other modes of transport and potential travel planning measures can support a reduced parking provision and enable a more efficient use of land.

3.38 … at both the home and point of destination, insufficient or inappropriately located parking can lead to problems of overspill parking from the development site onto surrounding streets and verges creating highway safety problems and unsightly environments.

This supports policy HOU 06 – Appropriate Parking Provision. Whilst this policy relates to residential parking it sets out a policy for appropriate provision which seeks to minimise the impact on residential streets. Residential parking in off-street car parks is relevant to the strategy.

6.3 Breckland 2035 Sustainability Strategy

Breckland District Council declared a climate emergency on 19 September 2019. Since then, the Council has committed to reducing the level of greenhouse gases within the district. striving to achieve net zero as an organisation by 2035.

The 2035 Strategy includes a list of commitments and a Climate Chage and Sustainability Work Programme which seeks to use to tools at the Council's disposal including through the local plan, street lighting, waste contract and taxi licensing. A budget of £525,000 is proposed to be used to deliver a number of activities including new tree planting and environmental schemes.

Where there is a surplus in parking revenue, Section 55 of the Road Traffic Regulation Act 1984 sets out a number of areas which can be funded by the car parking account. These areas include: transport, highway or road improvements; environmental improvements (including reduction of pollution and improvement or maintenance of amenity); and provision of outdoor recreational facilities available to the public without charge. Therefore, parking revenue raised from off-street parking could be an important way of helping to achieve the objectives of the 2035 Strategy.

6.4 Car Park Transformation Project, Alpha Parking, 2012

The information contained within the Alpha Parking study is still valuable and should be considered.

Thetford Conclusions:

- That a residents permit scheme be introduced for off-street car parks
- That market Place, St Giles St, St Nicolas St, White Hart St be short stay <3hrs
- Bridge St, Bury Rd, Cage Lane, Castle St, Pike Lane, School Lane, Tanner St N&S allow longer stays
- That Priory Park car park should remain free.

Dereham Conclusions:

- Cowper Lane and Guildhall be reserved for short stay parking <3hrs
- Cherry Lane and Swaffham Hill allow longer stays
- That all four car parks are suitable for P&D.

Swaffham Conclusions:

- Market Place, Pedlars Lane and Town Pit be reserved for short stay parking <3hrs
- Lynn St, Station Yard, Theatre St allow longer stays
- That all car parks are suitable for P&D except Town Pit which should be exclusively for the use by blue badge holders

Attleborough:

- That all three car parks could be suitable for P&D but that free periods may be necessary to support the town's vitality.

Watton:

- That only High St car park is suitable for P&D parking
- That Kittle Close and Thetford Rd should stay uncharged.

Recommended tariffs were as follows:

	>1 hr	>2hr	>3hr	>4hr	All day
Thetford	£0.60	£1.20	£1.80	£2.40	£3.00
Dereham	£0.60	£1.20	£1.50	£2.00	£2.50
Attleborough	£Free	£1.00	£1.50	£2.00	£2.50
Swaffham & Watton	£0.50	£1.00	£1.50	£2.00	£2.50

Introduction of charging in car parks would be likely to displace cars onto the highway. In mitigation, the study proposed the introduction of charging for local on-street parking. Other specific

recommendations included improving sites and technology to be employed. These will be considered in the recommendations report.

6.5 Land Group Breckland Ltd Report, 2015

The 2015 report utilised surveys to make conclusions about usage.

Attleborough:

- Overall the town has insufficient parking capacity
- Long stay parking is restricted, and supply should be managed to increase churn
- Edenside and Queens Square car parks provide opportunities for expansion
- The Horse Pit is used almost exclusively for longer term residential parking and so has limited impact on the town's wider vitality
- Additional development in Attleborough will exacerbate the parking situation
- The main policy tool to support the town's vitality will be to introduce stay limits and charging.

Dereham

- There is some capacity because of the size of the Cherry Tree site
- Becclesgate is also used by school drop/off pick up
- Demand will increase as a result of planned development.

Swaffham

- All of the town car parks were at or over capacity at some point during the study, although there was space in Theatre St except on the Saturday morning market day.
- Theatre St should be the focus of longer stay parking.

Thetford

- Car parks were c.80%+ full for most of the day
- Around 25% of spaces were occupied by vehicles parked in excess of 6 hours
- Car parking time restrictions were largely ignored by motorists
- Nicolas St Car Park specifically was over-capacity with double parking observed
- Minstergate should be considered for a greater degree of control once leases expire.

6.6 Summary.

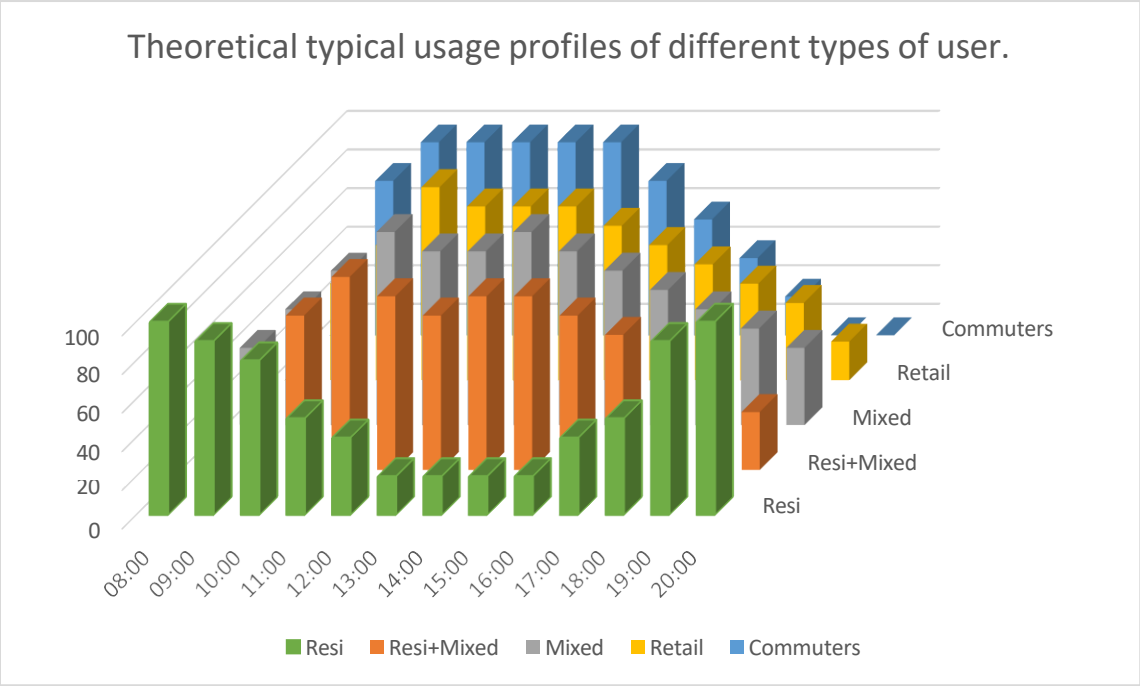
The transport policy position of managing parking through tariffs, along with detailed implications for parking, appears to be well established and in-depth parking studies (including data collection) has been completed, albeit prior to Covid19.

11. Towns and Sites Analysis

In this section we consider the usage profile, user and town context in order to provide recommendations for the management of the off-street parking estate.

Detailed survey data was collected in the early summer of 2023 which can be used to identify the primary type of user of a site. We would expect to see the usage patterns below for different types of users.

Figure 22. User Profiles



7.1 Attleborough

Attleborough can be characterised as a small market town. With a population of nearly 10,500 it benefits from direct rail connections to Norwich and Cambridge. Attleborough does not appear on the Retail Vitality Index (RVI).

Attleborough's Town Delivery Plan (ATDP)[14] considers the relative weaknesses and strengths of the town. Strengths include a good range or retail and services (including an infant, primary and secondary school, a sports hall and a surgery) and weaknesses a lack of nighttime economy such as restaurants, peak time traffic and a poor pedestrian environment. Despite the rail line, public transport overall is fair-poor with less frequent rail services and bus services to neighbouring settlements.

Important to note is the plan for a Sustainable Urban Extension (SUE) to the south of the railway station which plans to deliver up to 4,000 new homes with parkland, sports provision and neighbourhood retail. Although the objective will be to reduce car use and dependence, this could result in higher demand for town centre parking facilities.

[14] https://www.breckland.gov.uk/media/20096/Attleborough-Town-Delivery-Plan/pdf/01_Breckland_Town_Delivery_-_Attleborough_v1_Optimised.pdf?m=637921755030970000

An assessment of the economy in Attleborough shows a low level of commercial floorspace, more manufacturing jobs than the national average, fewer financial services and an oversupply of charity and second-hand shops.

here are three Council car parks in Attleborough:

- Edenside
- Horse Pit
- Queens Square

Edenside

Edenside has a capacity of 46 spaces and serves the eastern side of the town centre triangle. The surveys showed that it was very busy throughout the day.

Figure 23. Edenside accumulation Wednesday

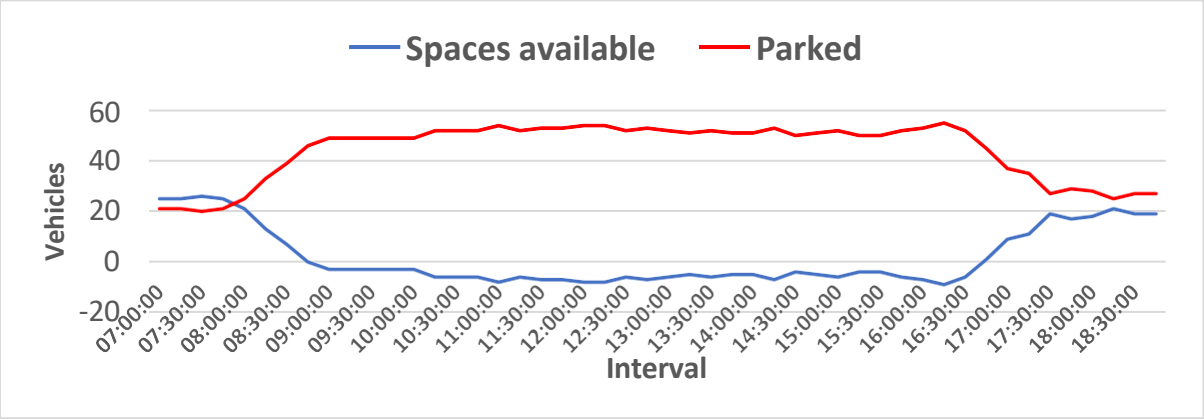


Figure 24. Edenside accumulation Thursday

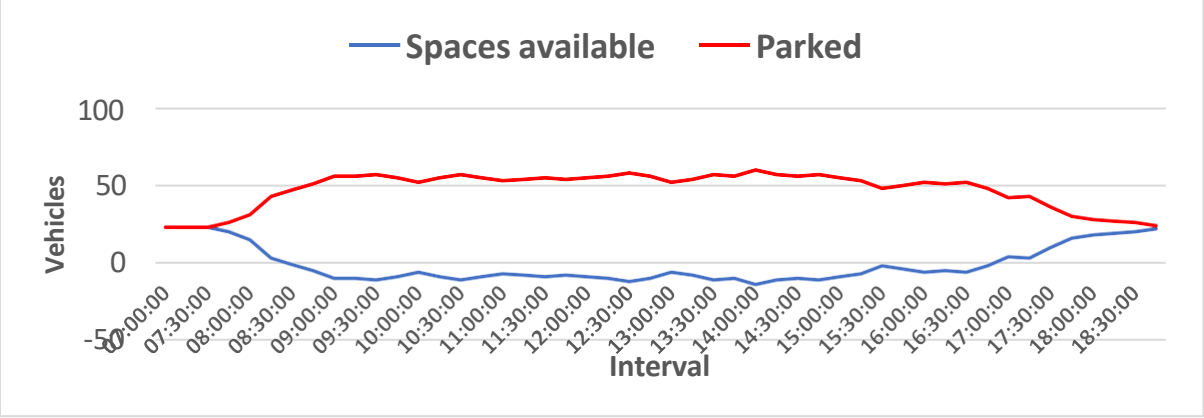
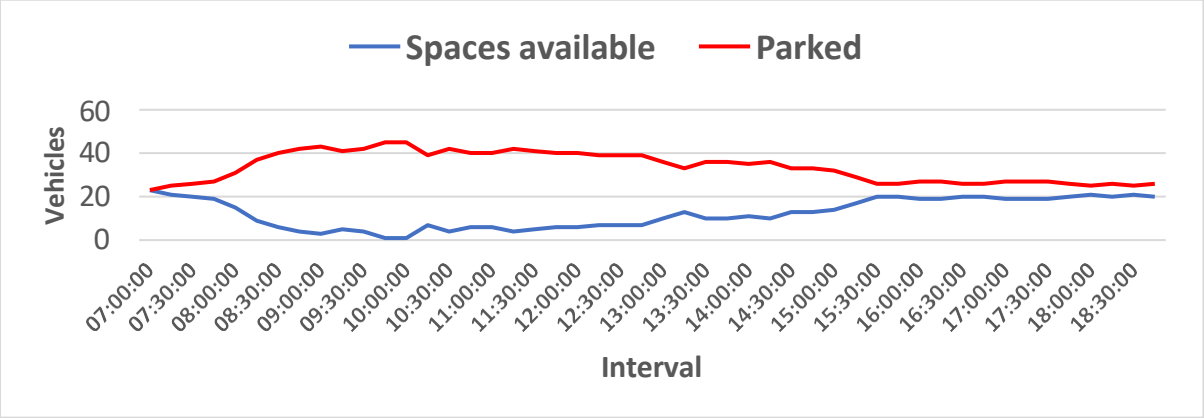


Figure 25. Edenside accumulation Saturday



All three days of the survey showed the car park was already c.50% full at 07:00 and the same at the end of the day at 19:00. The site reached 100% full on all three days and exceeded this on Wednesday and Thursday with parking out of bay observed.

The surrounding streets have parking restrictions and residential conversions such as Eden Lane which do not have dedicated off-street residential parking. The ANPR survey data shows 7 vehicles did not move all day. A combination of the accumulation data, ANPR data and length of stay (35% stayed longer than 3hrs) clearly suggests that a proportion of the parking is due to local residents rather than visitors to the town.

Horse Pit

Horse Pit is a local car park in a residential area which serves two restaurants and a social club. The surveys showed high occupancy throughout the day.

Figure 26. Horse Pit accumulation Wednesday

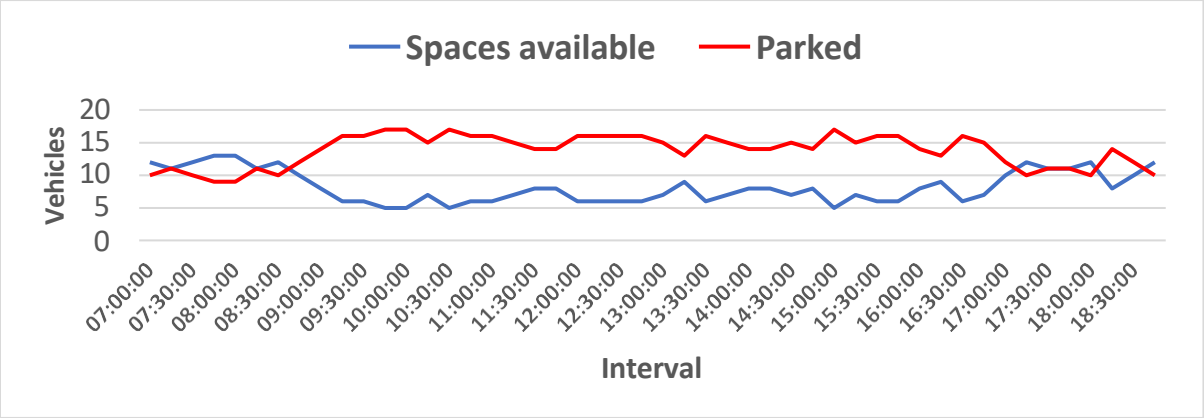


Figure 27. Horse Pit accumulation Thursday

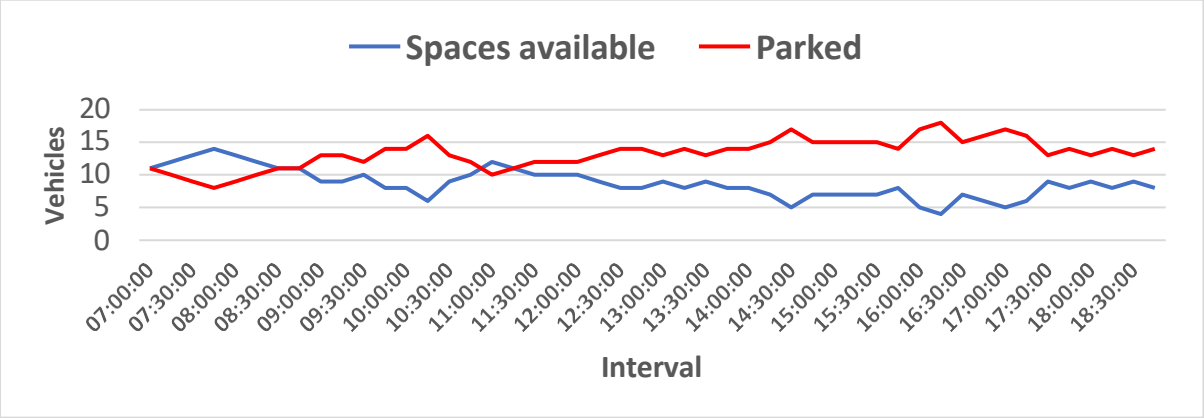
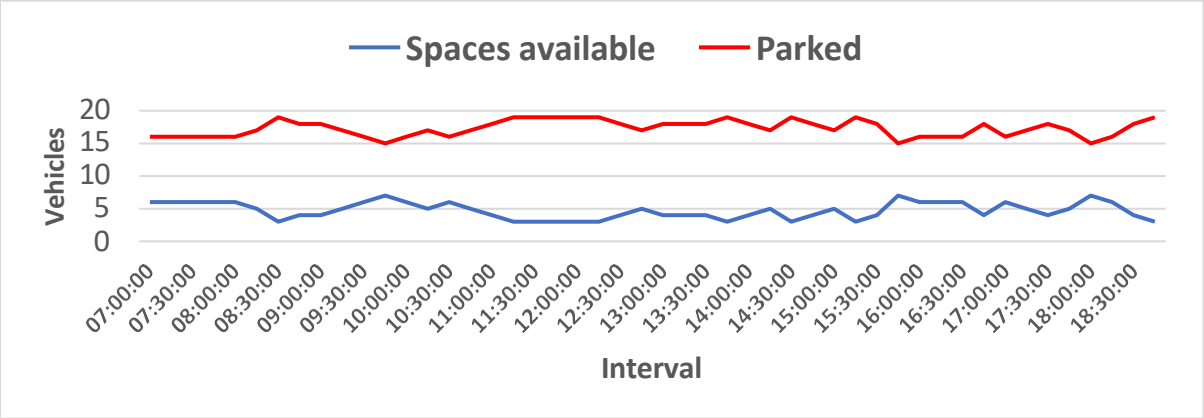


Figure 28. Horse Pit accumulation Saturday



Although there were spaces available throughout the day on all days, the car park was well occupied. The occupancy at the beginning and end of the day was high and churn was low at 2.71 vehicles per space. The combination of the occupancy, low churn and start/end occupancy shows clearly that the site is used primarily by residents. The very flat accumulation graph on the Saturday reinforces this conclusion.

Queens Square

Queens Square provides the most convenient parking for the shops and services of the town centre with good and quick pedestrian links to Church Street.

Figure 29. Queens Sq. accumulation Wednesday

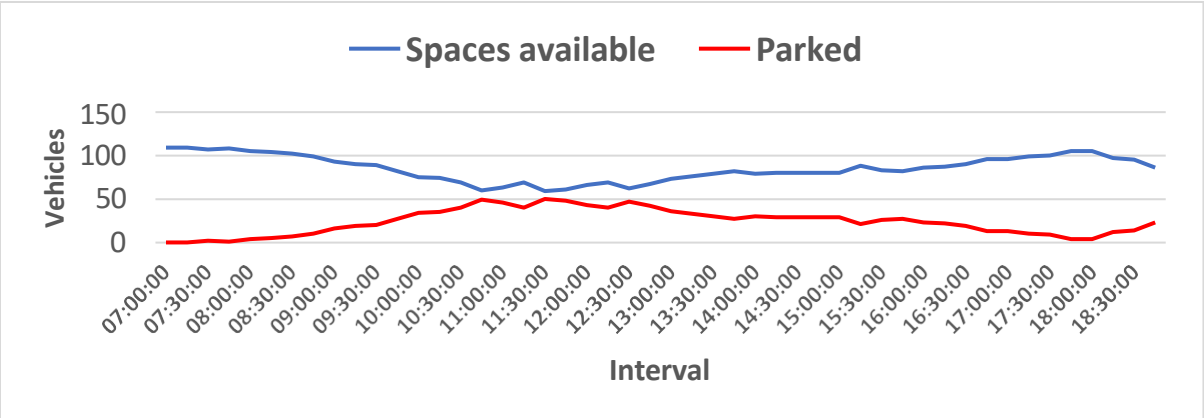


Figure 30. Queens Sq. accumulation Thursday

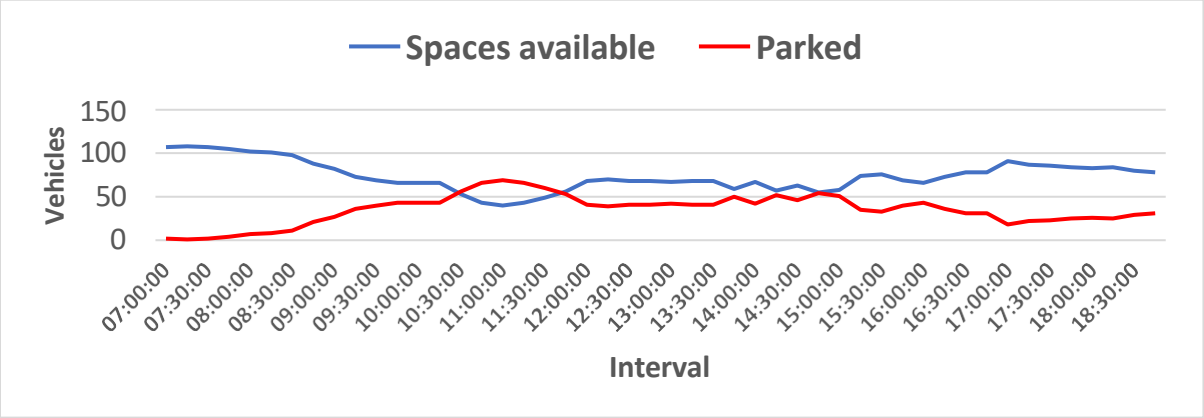
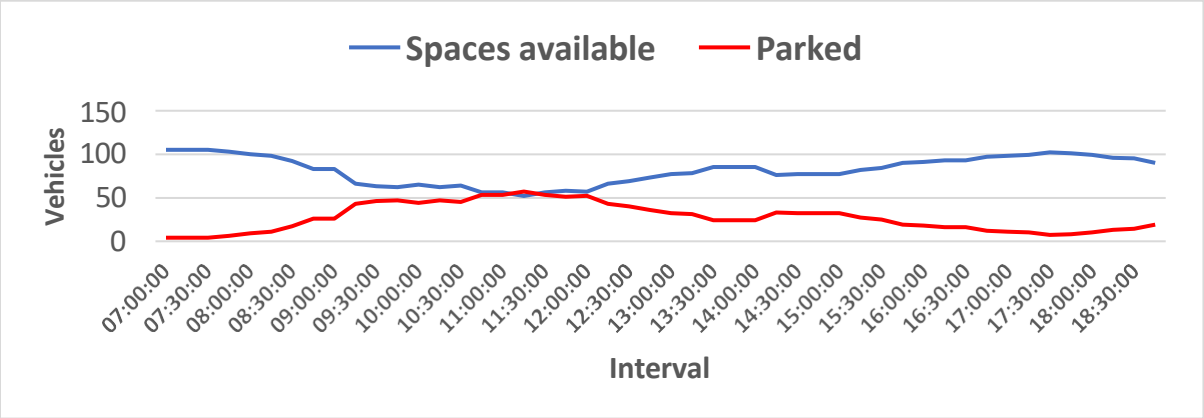


Figure 31. Queens Sq. accumulation Saturday



Not only do the start/end counts show low occupancy in Queens Square, the churn and accumulation patterns strongly suggest that the main users of the car park are those accessing retail or services in the town centre, who overwhelmingly stay for 1-2 hours.

Attleborough Summary

A summary table is shown below along with data showing lowest and highest observed occupancy, churn, and length of stay (percentage) by car park.

				Length of Stay			
Car Park	**Capacity**	**Least**	**Most**	**Churn**	**< 1hr**	**1 - 3 hrs**	**3hr >**
Edenside	46	20	58	3.12	43	21	35
Horse Pit	22	8	19	2.71	53	20	27
Queens Square	109	0	69	4.15	63	34	3

The data suggests that Horse Pit is used primarily by residents, Edenside is mixed, and Queens Square is used as the main car park for the retail and services in the town.

7.2 Dereham

Dereham is the second largest town in the District with a population of 18,600 and a recorded history going back to the 8th Century. It scores 693, ranked 886 on the RVI which places it amongst much larger places such as Rotherham, Hastings and Telford for retail vitality.

As well as the Mid-Norfolk heritage railway, Derham has a reasonable number of tourism attractions including Gressenhall Farm and Dereham Windmill. The town benefits from good regular express bus services to Norwich, Kings Lynn and Peterborough which run early in the morning to later in the evening.

Dereham's Town Delivery Plan (DTDP) considers the available retail and services and notes its role in serving a rural hinterland of around 20,000 population based on a 20min drive to the town.

The DTDP considers relative weaknesses and strengths of the town. Strengths include a good range of retail and services, a regular weekly market, mix of architectural types and tourism assets. Weaknesses highlighted include an over representation of charity shops and health and beauty outlets and a lack of night time economy such as restaurants and cafés. Dereham's' IMD rankings are relatively poor.

The regeneration of the Market Place is a key proposal in the DTDP which finds that a lack of bus coordination and a prioritisation of on-street parking leads to congestion around the Market Place, but that removal of parking in this area would need to be managed. Cowper Road car park is also proposed as a mixed-use development site. Digital signage directing motorists to available parking spaces is also proposed.

Of note are future plans for around 1,700 new homes in seven strategic sites and 3 ha of employment land.

There are four main Council car parks in Dereham:

- Cherry Tree
- Cowper Lane East and West
- Swaffham Hill (also known as Becclesgate)
- The Guildhall (and Breckland Business Centre).

Cherry Tree

Cherry Tree is the largest Council car park in the district with 446 spaces. Despite its size, the site reached c.70% full on the Wednesday and Thursday but only 40% on the Saturday.

Figure 32. Cherry Tree accumulation Wednesday

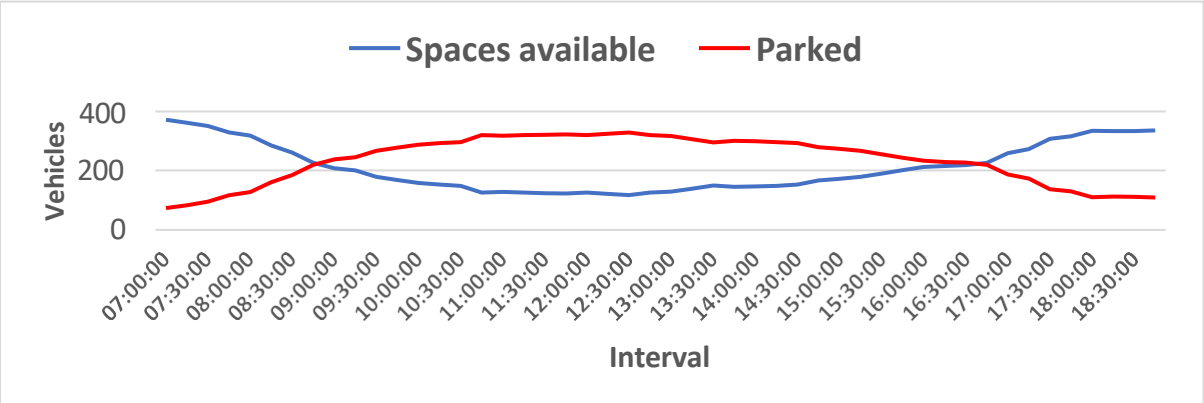


Figure 33. Cherry Tree accumulation Thursday

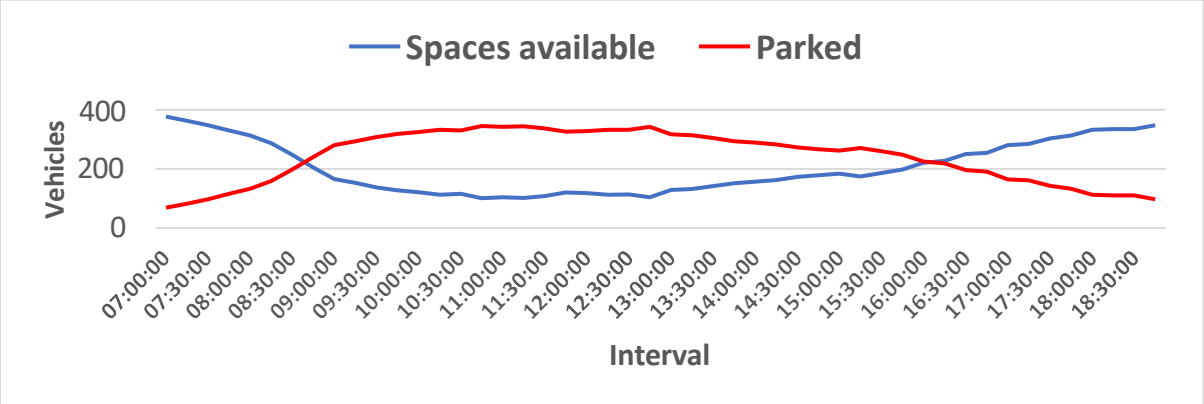
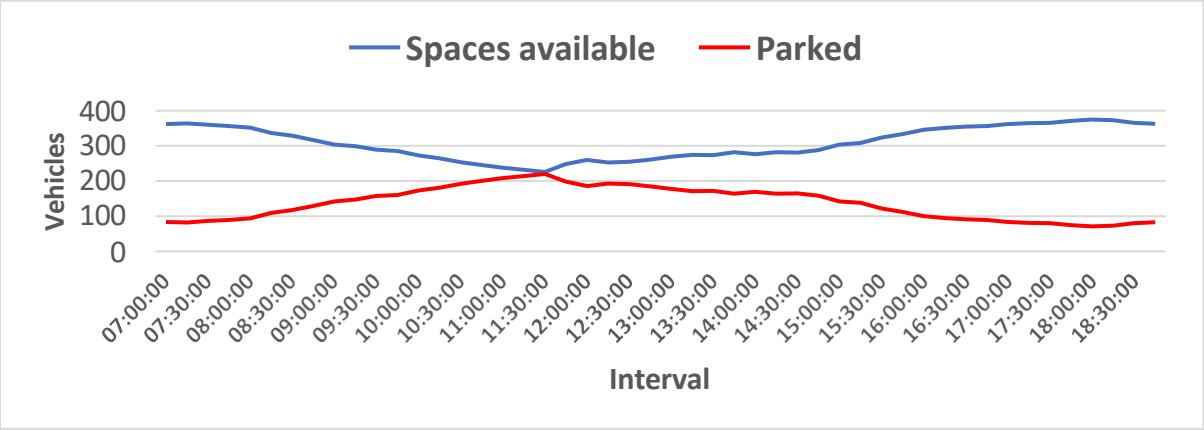


Figure 34. Cherry Tree accumulation Saturday



The usage patterns for the Wednesday and Thursday are typical of a mixed car park with commuters: accumulation rises until 09:00 and stays reasonably flat until it drops in the afternoon. The start and end counts suggest the site is used by residents' over-night, and gates into the car park from gardens were observed which supports this conclusion.

The Saturday usage patterns is more in line with retail use: a steady increase until 11:00 and then a decline, which we see elsewhere in these types of car parks.

Cowper Lane East

Cowper Lane is split across two sites, east and west. The western site is small with about 22 spaces. Only the eastern site was surveyed.

Figure 35. Cowper Lane accumulation Wednesday

Figure 36. Cowper Lane accumulation Thursday

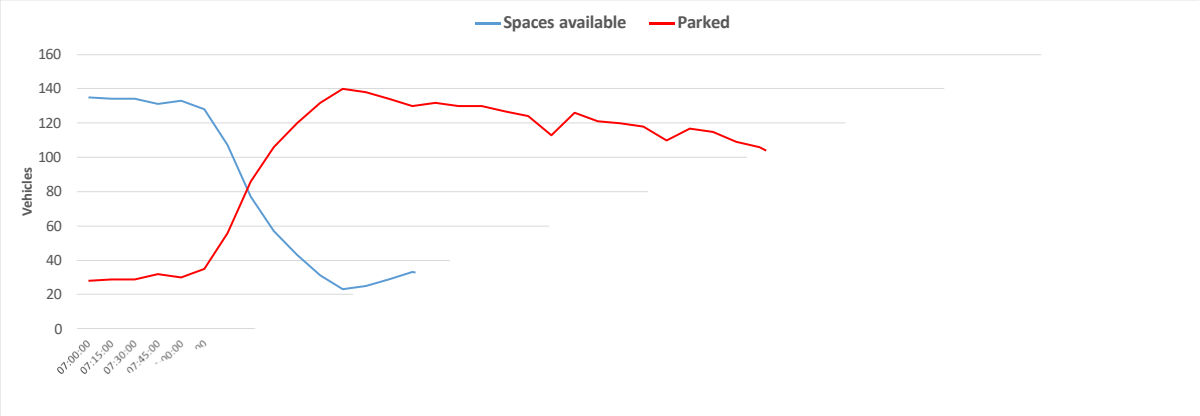
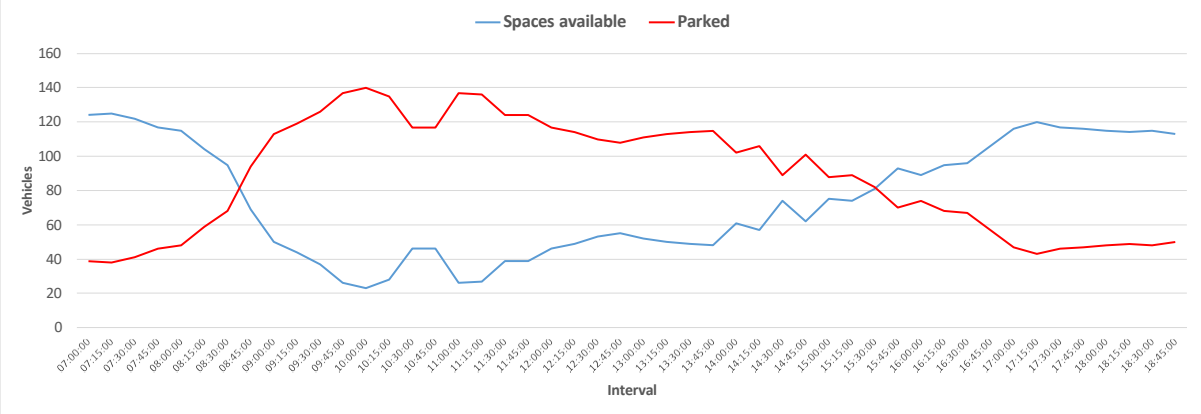


Figure 37. Cowper Lane accumulation Saturday



Cowper Lane East's usage patterns suggest a mixed purpose site with reasonable churn and some commuting (possibly retail workers). 55% of stays are under an hour with only 11% over 3hrs, further reinforcing its importance for visitors to the town centre.

Swaffham Hill (Becclesgate)

Swaffham Hill is an unmade car park on the edge of the town centre close to open space and a neighbouring parade of shops, and only a 5-10min walk to Market Place via the churchyard.

Figure 38. Swaffham Hill accumulation Thursday

The car park reached 90% full on the Thursday with an accumulation pattern which suggests use by a variety of users, including overnight parking given the start and end counts. 43% of stays were under an hour suggesting use for the neighbouring retail.

The Guildhall

The Guildhall site includes parking for the Breckland Business Centre, of which the largest tenant appears to be Norfolk Children's and Young People's Services, and the Meeting Point community facility. The site was busy on all three survey days including the Saturday.

Figure 39. The Guildhall accumulation Wednesday

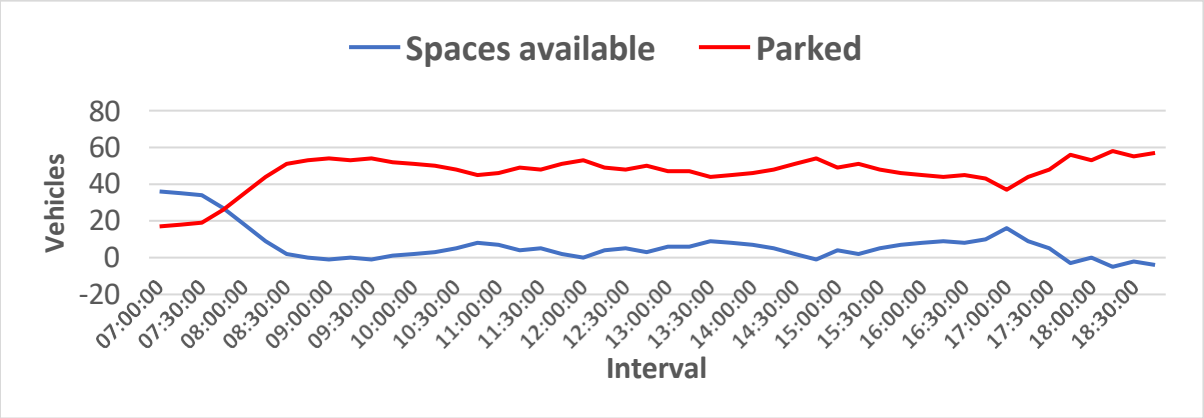


Figure 40. The Guildhall accumulation Thursday

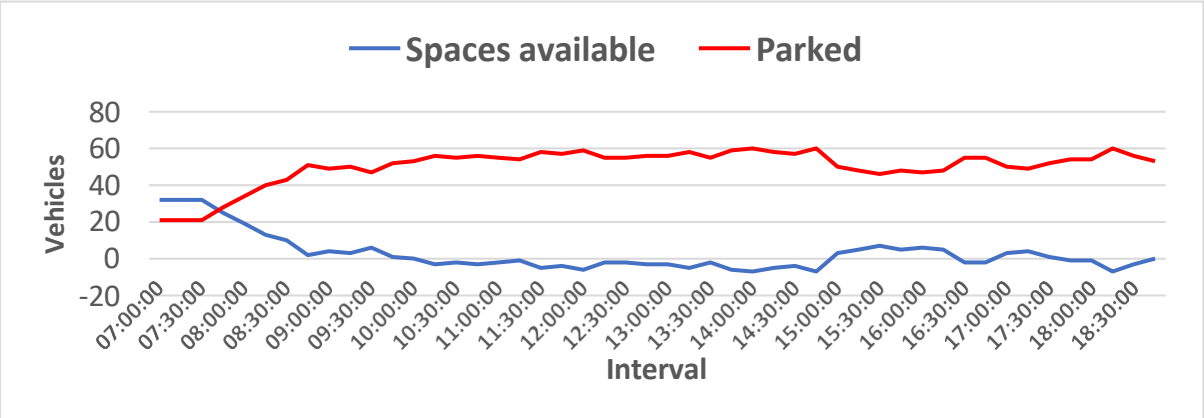
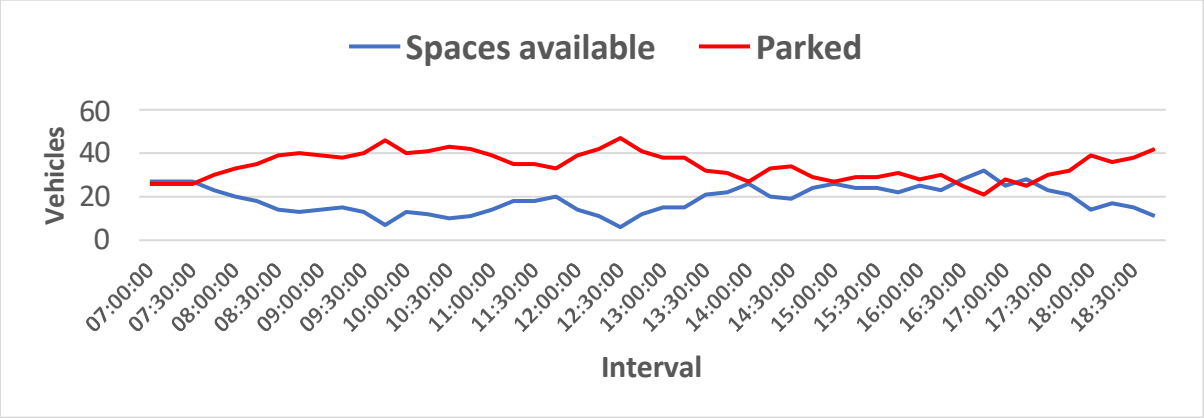


Figure 41. The Guildhall accumulation Saturday



The site was busy throughout the day on all the days of the survey and peaked in the later evening. The site has poor links to the town centre so evening use is perhaps due to evening uses at the Meeting Point and the Business Centre.

Dereham Summary

A summary of the Dereham sites is included below:

		THURSDAY					FRIDAY					SAT				
Car Park	Capacity	START	09:00	13:00	16:00	END	START	09:00	13:00	16:00	END	START	09:00	13:00	16:00	END
Cherry Tree	446	14%	53%	71%	52%	25%	14%	63%	71%	50%	22%	18%	32%	40%	22%	19%
Cowper Rd East	163	12%	48%	75%	58%	37%	15%	65%	72%	63%	25%	23%	69%	68%	43%	31%
Swaffham Hill (Beccles	24	38%	46%	67%	42%	38%	38%	63%	88%	75%	42%	46%	38%	54%	50%	63%
The Guildhall	53	32%	102%	89%	85%	108%	40%	92%	106%	89%	100%	49%	74%	72%	53%	79%

				Length of Stay			
Car Park	Capacity	Least	Most	Churn	< 1hr	1 - 3 hrs	3hr >
Cherry Tree	446	69	342	7.63	44	30	25
Cowper Rd East	163	23	137	5.07	55	34	11
Swaffham Hill (Becclesg	24	7	22	1.97	43	27	30
The Guildhall	53	20	72	4.6	45	29	23

Dereham town centre also includes large privately controlled car parks at Cross Way and Morrisons. These both enforce 3hr max stays. Any change to the regime of the Council car parks is likely to impact the management regimes at these sites.

7.3 Swaffham

Swaffham has a population of 7,258 and with three car parks with a total of 429 spaces. An established market takes place on Saturdays. The retail offer is fair. Swaffham's Town Delivery Plan considers as strengths a strong Neighbourhood Plan, beautiful Georgian architecture, the market and a good mix of services, cafés and shops. Weaknesses include traffic, and over representation of charity shops, little evening offer and a deprivation challenge in parts of the town.

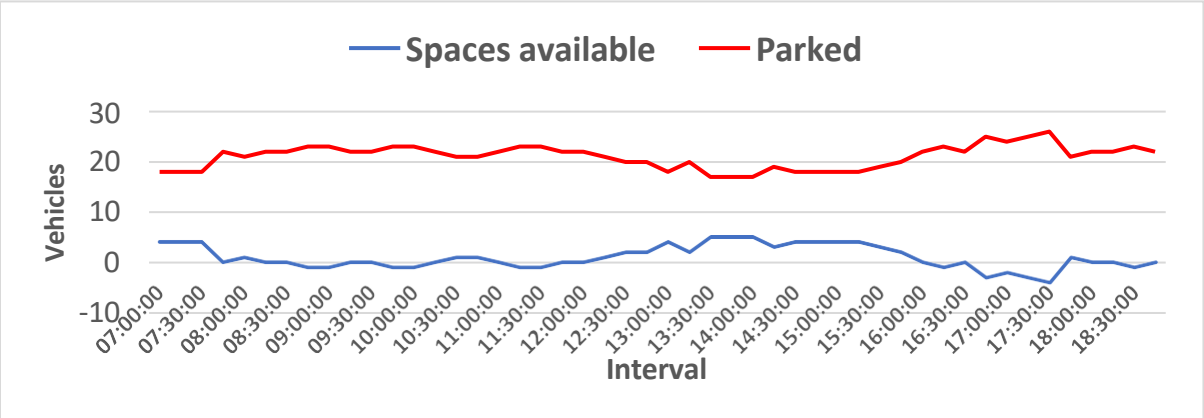
There are six main Council car parks in Swaffham:

- Lynn Street
- Pedlars Lane
- Pit Lane
- Station Yard
- Theatre Street
- Market Place.

Lynn Street

The three survey days have a similar usage profile which strongly suggests local use by residents and other nearby uses. This conclusion is supported by 35% of parking being of over 3hrs in duration. Out of bay parking takes place at various times as the site becomes over-capacity.

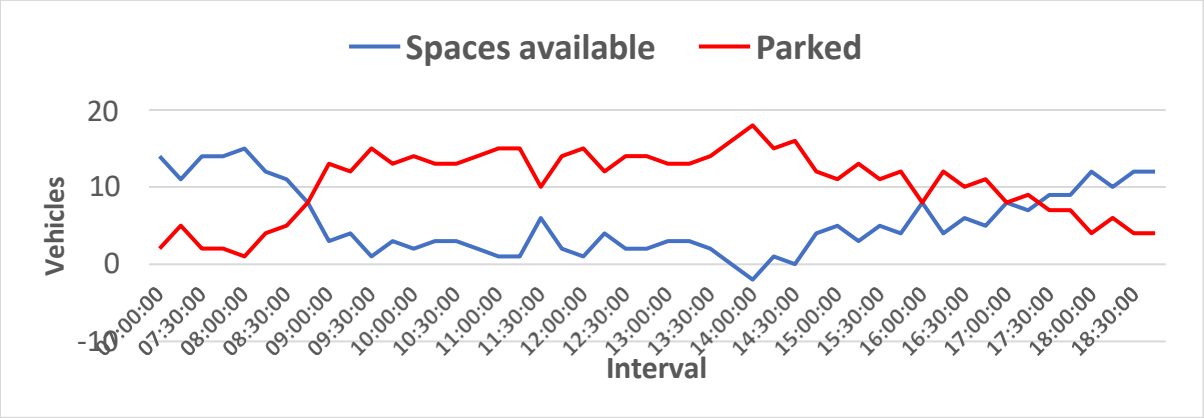
Figure 42. Lynn St. accumulation Wednesday



Pedlars Lane

Pedlars Lane is a small site with high turnover and 78% of stays under an hour. It is best described as convenience parking

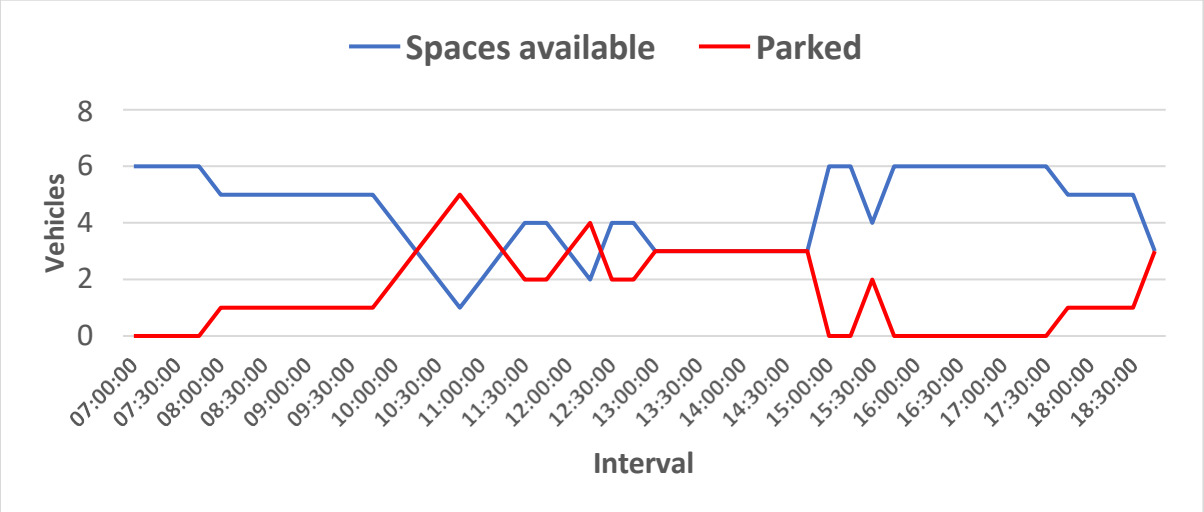
Figure 43. Pedlars Lane accumulation. Wednesday.



Pit Lane

Pit Lane is a very small and somewhat unusual site with only 8 parking spaces and the need to park with a voucher printed from the machine on-site.

Figure 44. Pit Lane accumulation Wednesday



Station Yard

This site is related to the business park and provides parking for HGVs, most of which park for over 3hrs.

Figure 45. Station Yard accumulation Wednesday

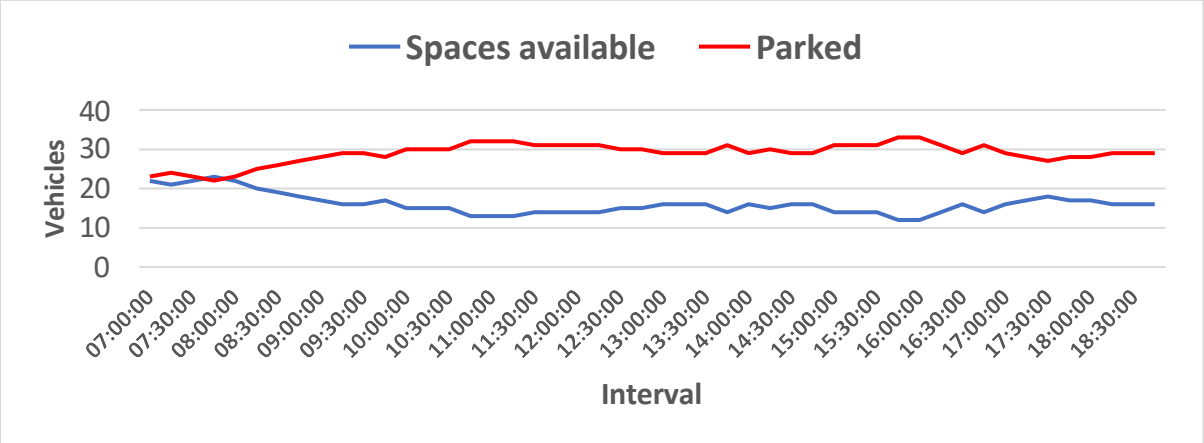


Figure 46. Station Yard accumulation Thursday

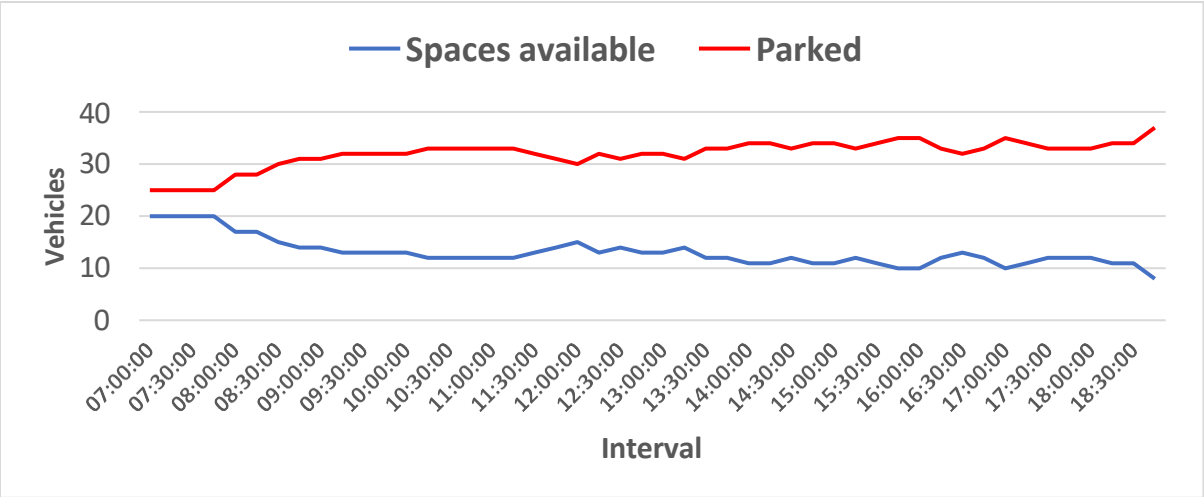
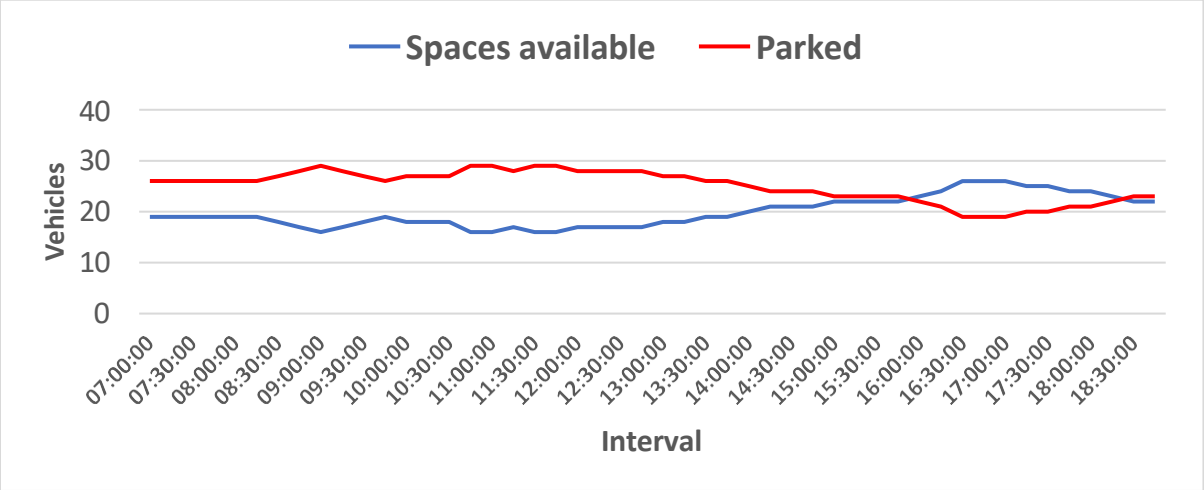


Figure 47. Station Yard accumulation Saturday



The surveys show a reasonable parking demand.

Theatre Street

Theatre Street is the largest Council car park in the town but has poor pedestrian links to the main town centre. It benefits from a good layout and surfacing but a complicated one-way system makes site hard to access.

Figure 48. Theatre Street accumulation Wednesday

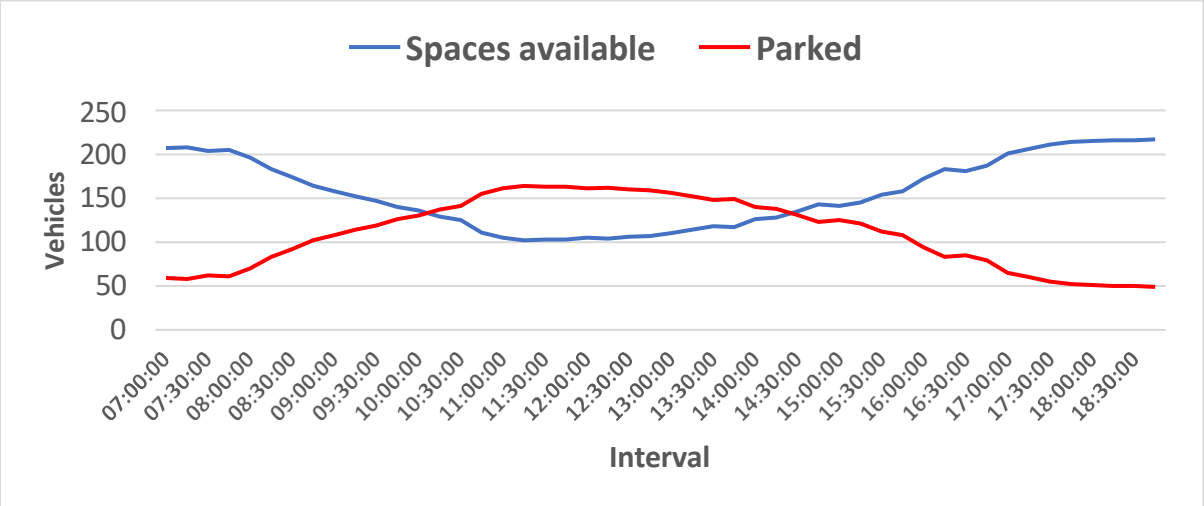


Figure 49. Theatre Street accumulation Thursday

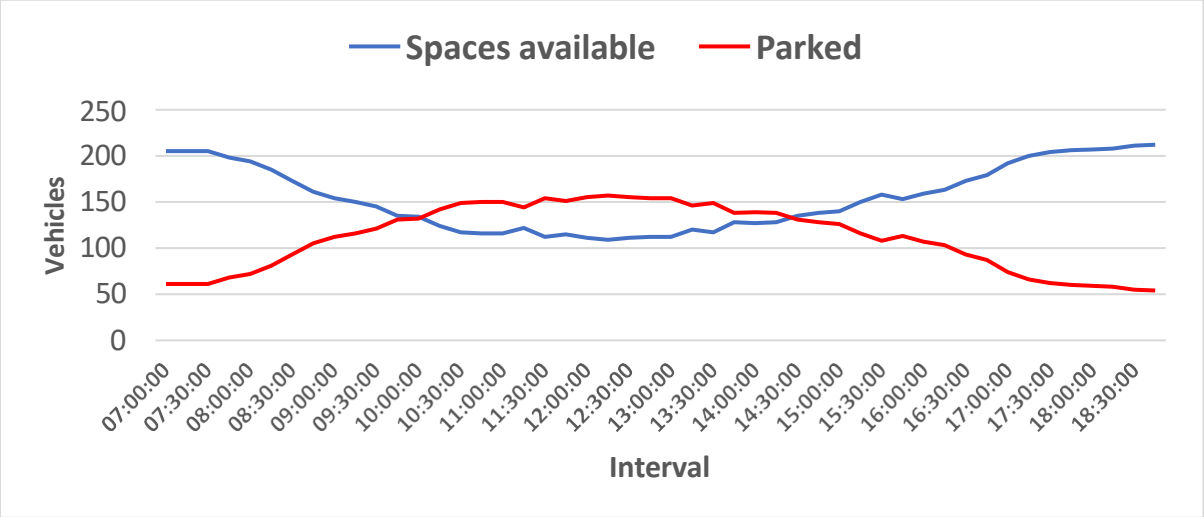
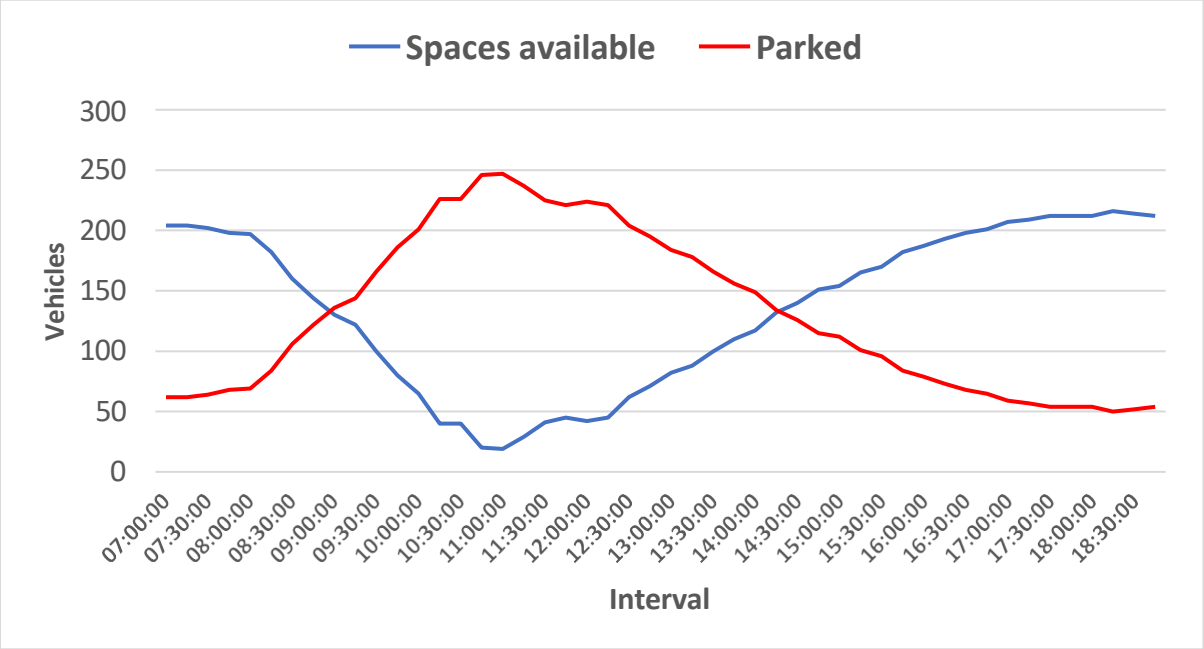


Figure 50. Theatre Street accumulation Saturday



Theatre St is the main car park for the town. It was close to full only on the Saturday, at which time Market Place car park was closed.

Market Place

Market place is ideally placed for short stay parking and is closed on Saturday and Sunday mornings for the market to take place.

Figure 51. Market Place accumulation Wednesday

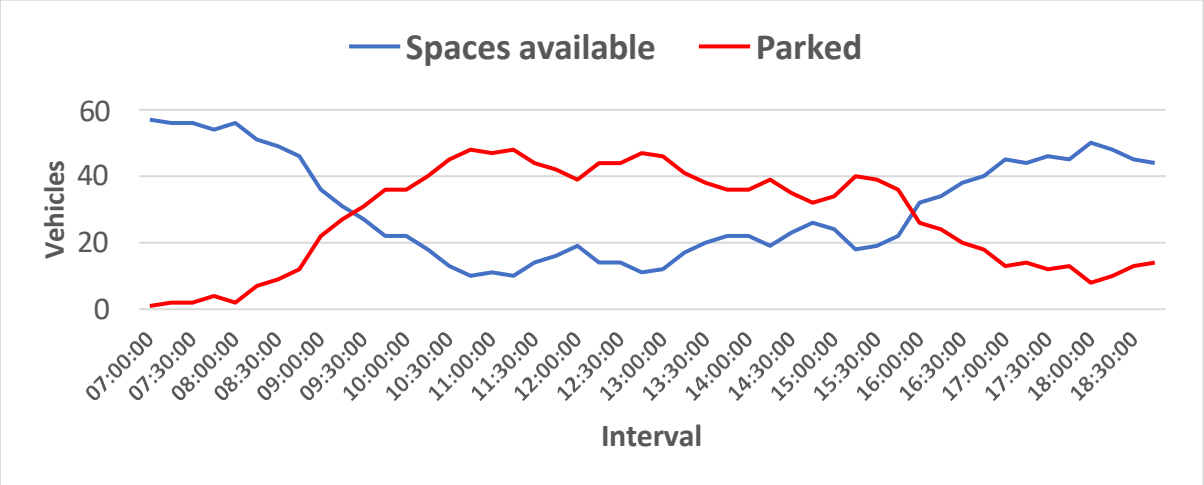


Figure 52. Market Place accumulation Thursday

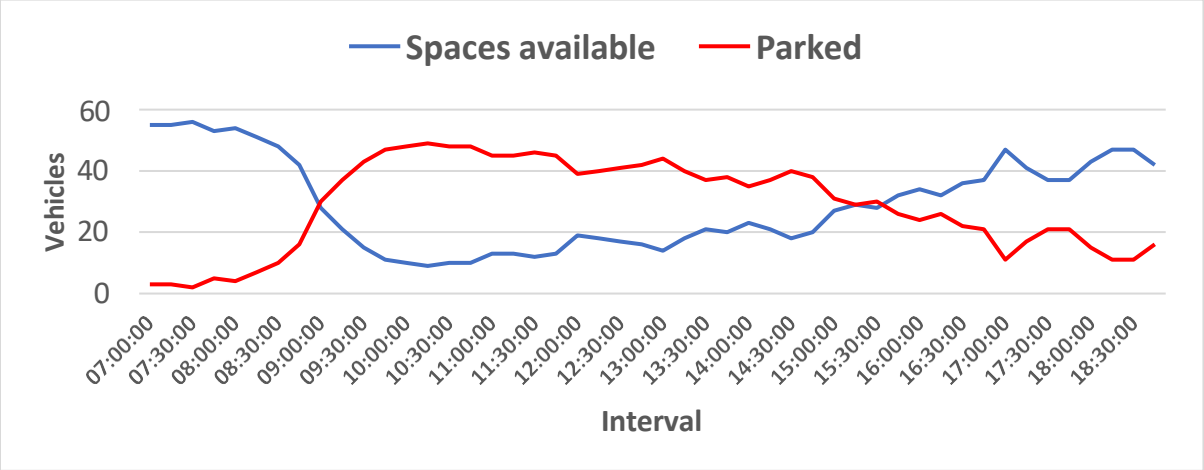
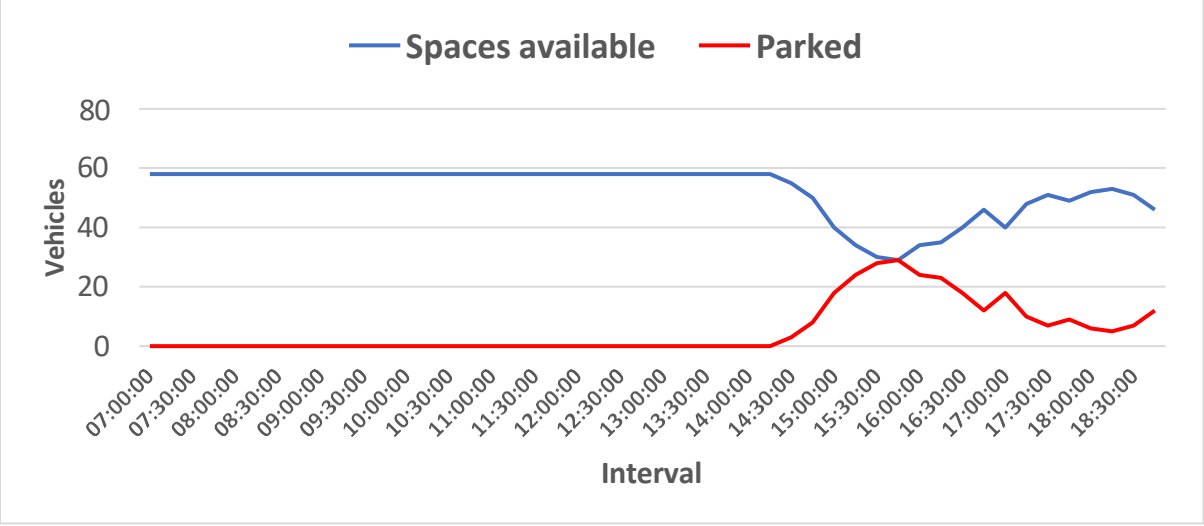


Figure 53. Market Place accumulation Saturday (closed in the AM)



Low start/end counts show very little overnight/residential parking. The usage profile suggests a retail focused car park.

Swaffham Summary

A summary of the Swaffham sites is included below:

					Length of Stay			
Town	Car Park	Capacity	Least	Most	Churn	< 1hr	1 - 3 hrs	3hr >
Swaffham	Lynn St	22	16	27	2.89	47	19	35
Swaffham	Pedlars Ln	20	0	18	12.55	78	22	1
Swaffham	Pit Lane	6	0	5	2.44	59	24	16
Swaffham	Station Yard	45	19	37	1.53	30	17	53
Swaffham	Theatre St	266	49	247	1.57	25	41	34
Swaffham	Market Place	58	0	49	5.78	67	31	2

7.4 Thetford

Thetford is the largest town in the district with a population of 24,300 and a long, pre-Roman history which has left a range of historic attractions and townscape. Thetford's Town Delivery Plan (TTDP) considers that there is a wide hinterland that serves 140,000 people as a result of a good location on communication lines between Cambridge and Norwich. The town has a wide range of retail and services including 6th form education and a waterpark.

The TTDP notes some weaknesses in low levels of leisure destinations in the town centre:

"Thetford does not currently have a reputation as a destination location. People use the town centre to transact and shop, but do not use the town for leisure or socialising. There are few facilities or venues that draw people into the town centre to spend leisure time or money. More can be done with the wealth of natural assets such as the riverside and marketplace to bring them into continual use with cafes and activities."

Thetford's employment profile shows a higher level of retail and wholesale and fewer ICT, media, financial and services jobs.

The TTDP proposes two car parking sites for redevelopment at School Lane and Tanner Street South.

There are 15 Council car parks in Thetford in 5 main groupings:

- Town Centre East (Pike Lane, Cage Lane)
- The Link
- Riverside Car Parks (School Lane, Tanner Street North and South)
- Thetford North (St Giles East, St Giles West, White Hart Street plus 4 sites not surveyed)
- Thetford South (Bridge Street and Bury Road).

Town Centre East – Pike Lane, Cage Lane

These car parks serve the eastern part of the town centre and Castle Park.

Cage Lane is a small and complex site and was very busy throughout the survey days. The survey usage profile shows the sort of pattern we would expect of a town centre mixed use car park with some retail, leisure and commuting patterns: a gradual build up during the morning, reaching a peak before midday and then decreasing occupancy during the afternoon.

Figure 54. Pike Lane accumulation Wednesday

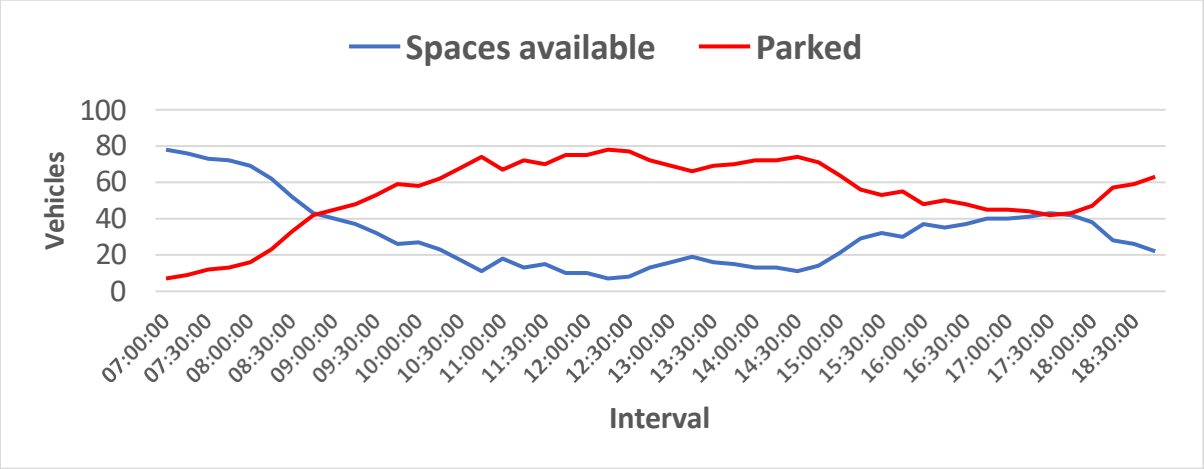


Figure 55.Pike Lane accumulation Thursday

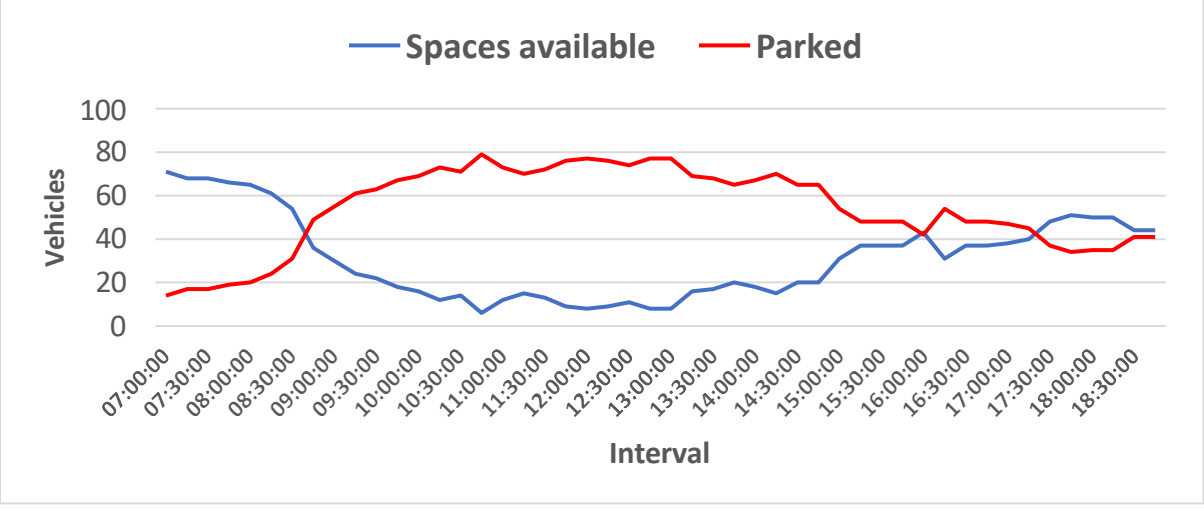
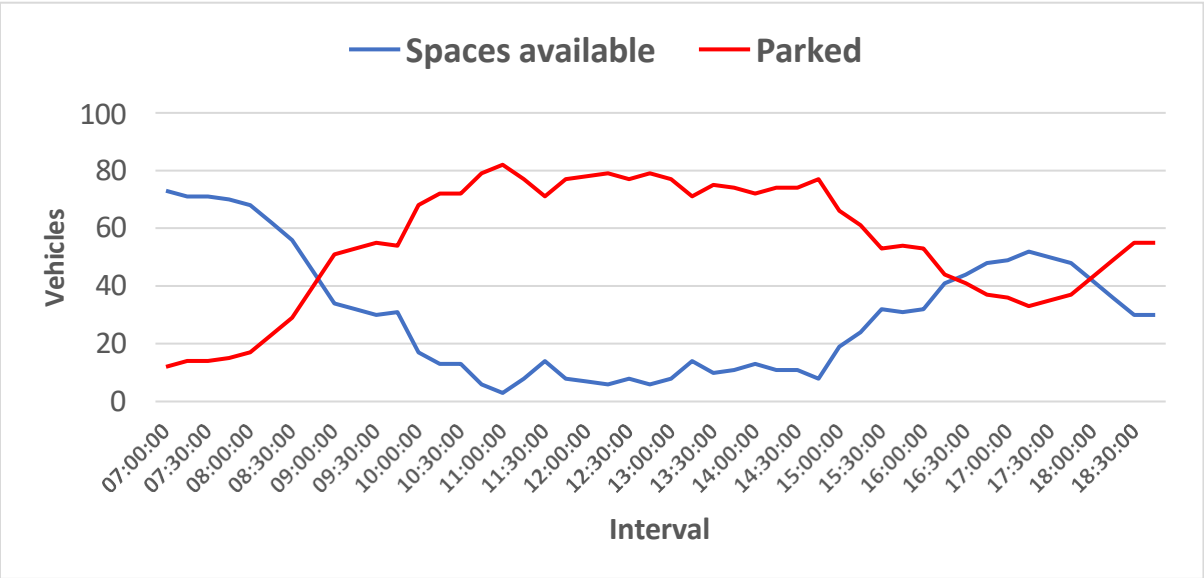


Figure 56. Pike Lane accumulation Saturday



42% of parking events under an hour and a further 36% under three hours strongly indicates a car park primarily used by those accessing shops and services.

Castle Street is a long linear strip of parking. No surveys were undertaken although at the time of the site visit the area was nearly full. Based on our experience, we would suggest that the site is used by nearby residents with any spare capacity taken up with park visitors.

Cage Lane is a mixed site with only a limited number of parking space dedicated to public parking and the remainder to loading and unloading and to serve the adjacent retail units.

Figure 57. Cage Lane accumulation Wednesday

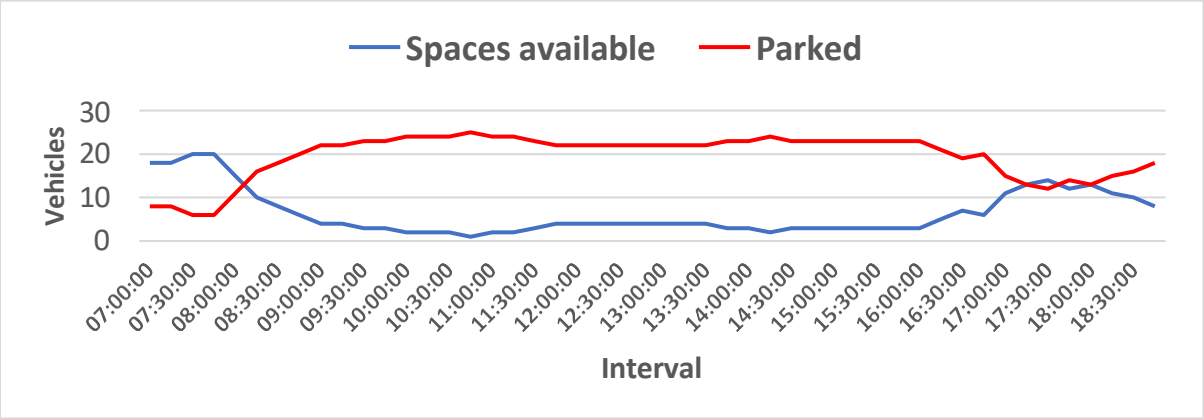


Figure 58. Cage Lane accumulation Thursday

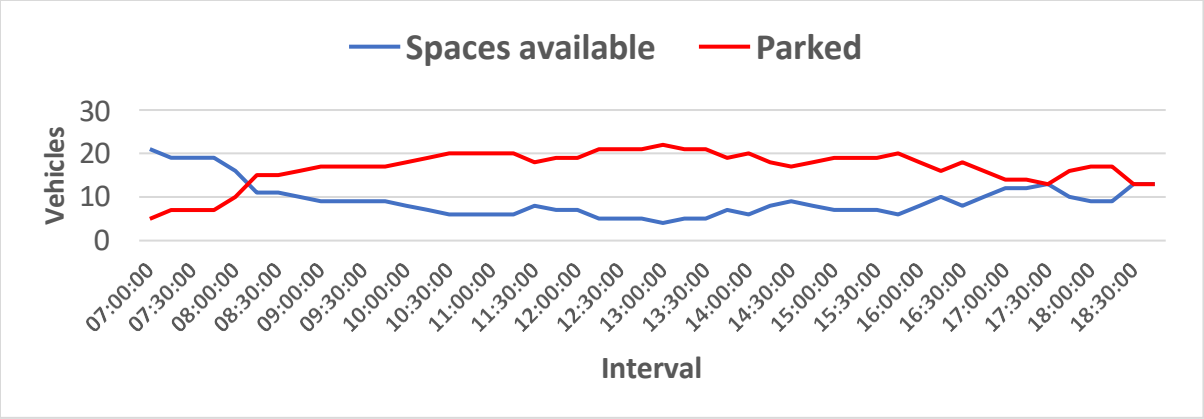
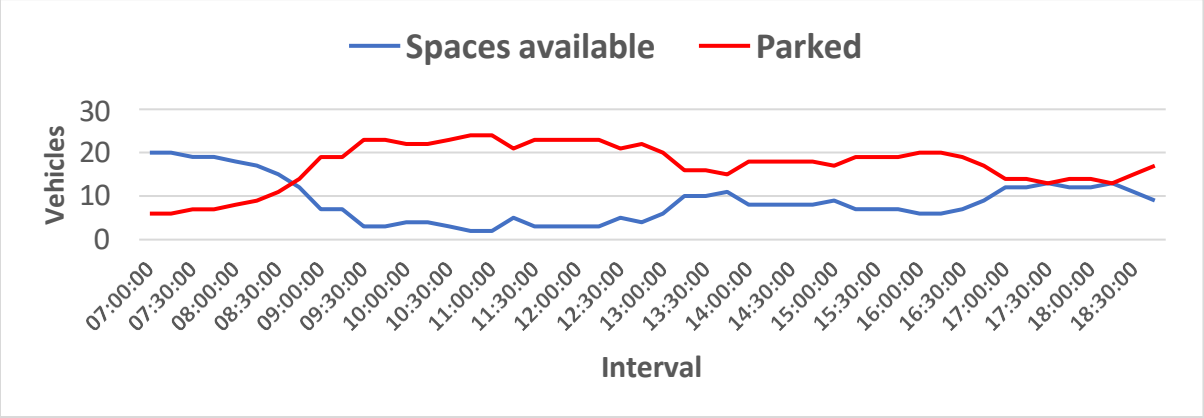


Figure 59. Cage Lane accumulation Saturday



Although there was in general more available space on the Saturday, the site was busier in terms of parking events, with 102 recorded on the Saturday compared to 71 and 86 on the Wednesday and

Thursday respectively. A churn rate of 3.1 combined with 46% of parking events under an hour strongly suggests convenience retail users.

The Link

The Link is an edge of centre car park, north west of the main town centre.

Figure 60. The Link accumulation Wednesday

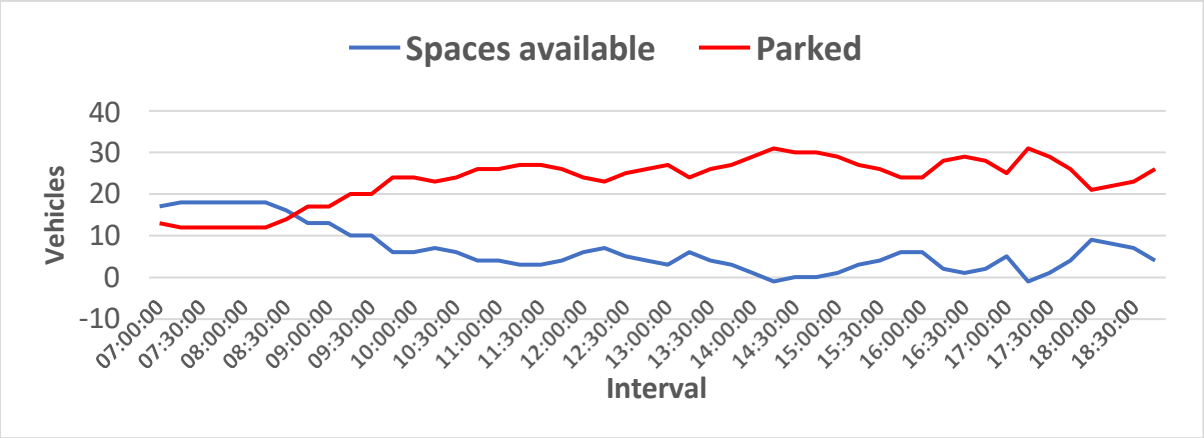


Figure 61. The Link accumulation Thursday

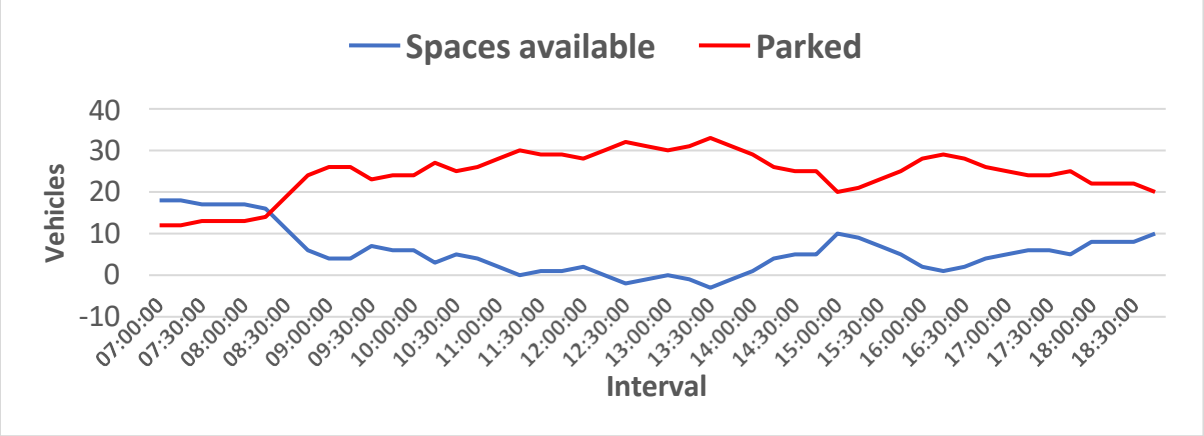
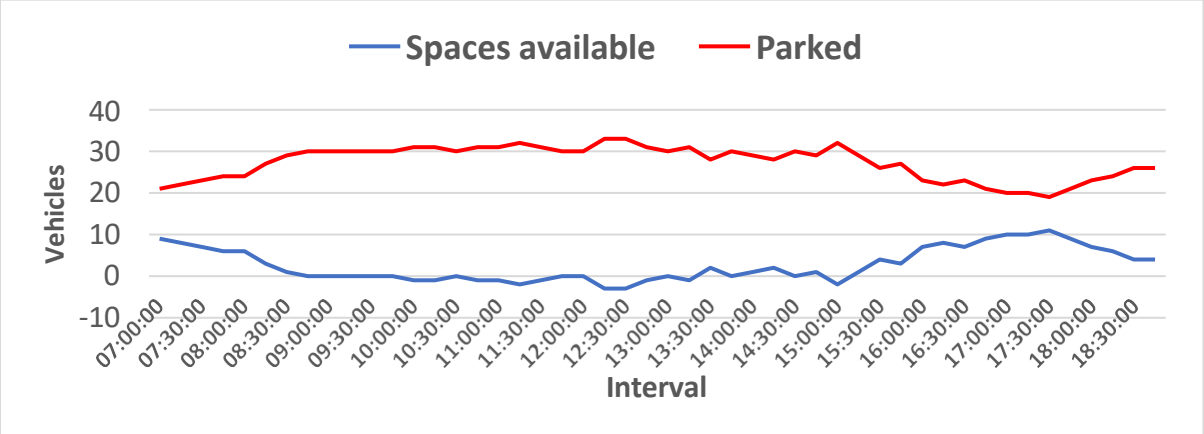


Figure 62. The Link accumulation Saturday



There were few periods where available spaces exceeded parked cars in this very popular car park. Although 54% of parking events were >1hr the start and end counts strongly suggest some

residential overnight parking and this is reinforced by on-street parking being limited in the surrounding residential area.

Riverside Car Parks – School Lane, Tanner Street North and South.

Both School Lane and Tanner Street are split across two sites. The School Lane site surveys were combined.

Figure 63. School Lane accumulation Wednesday

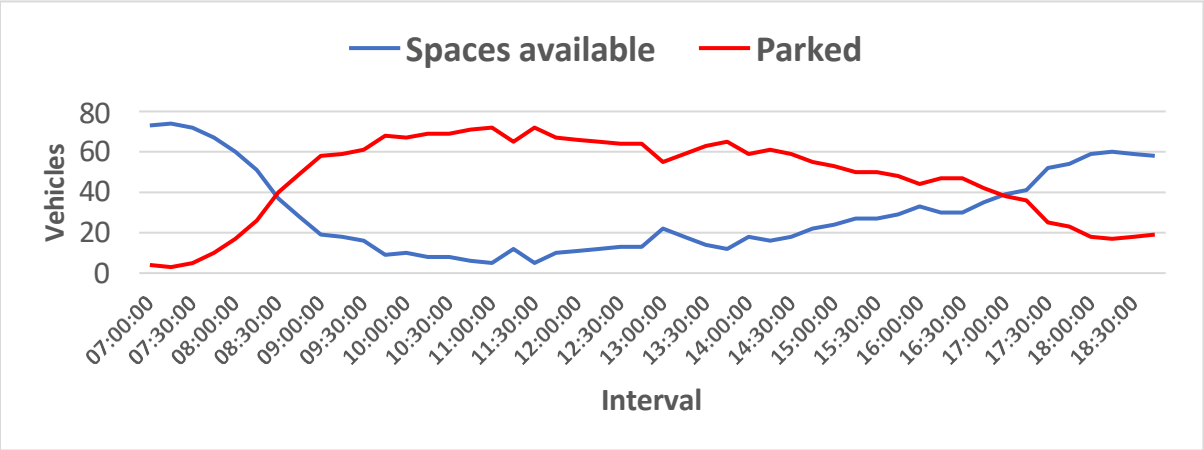


Figure 64. School Lane accumulation Thursday

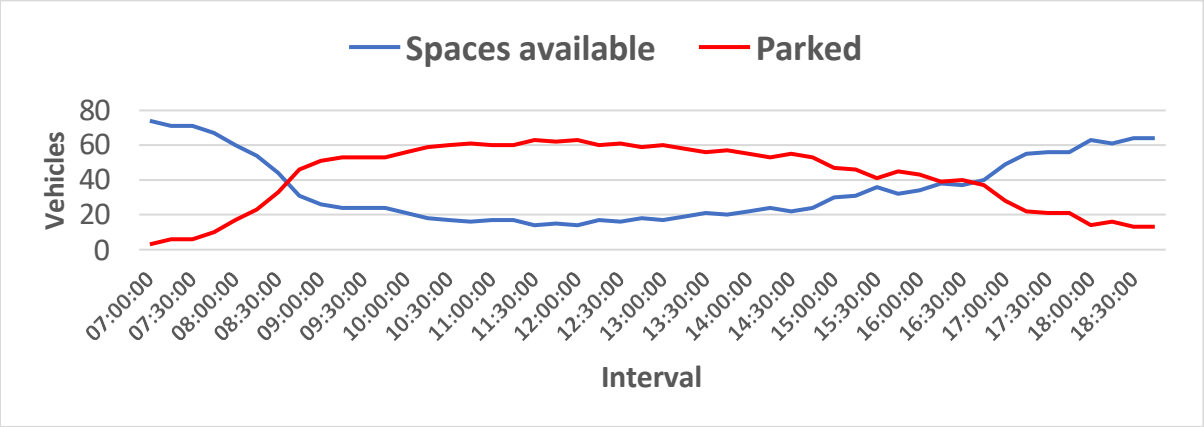
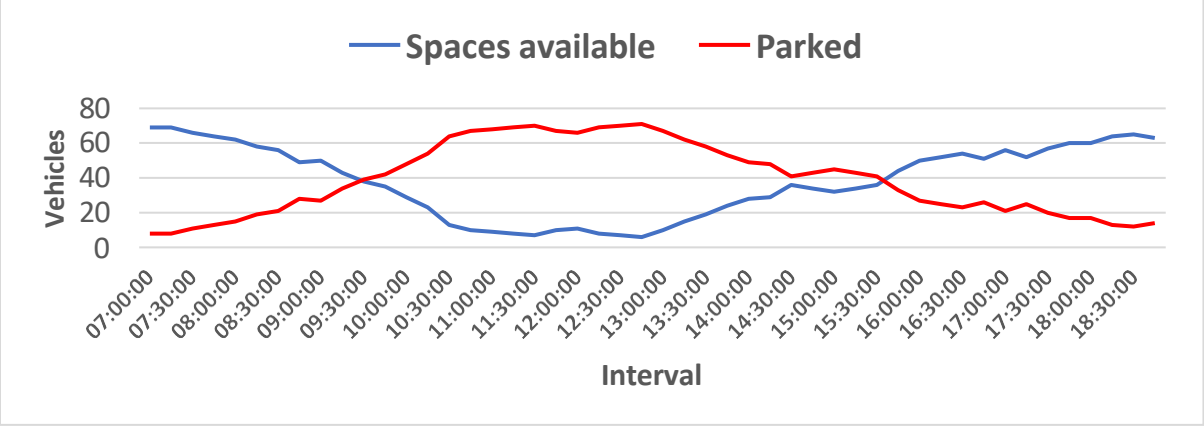


Figure 65. School Lane accumulation Saturday



School Lane shows usage typical of a town centre mixed car park, with low residential and overnight parking.

Figure 66. Tanner St N accumulation Wednesday

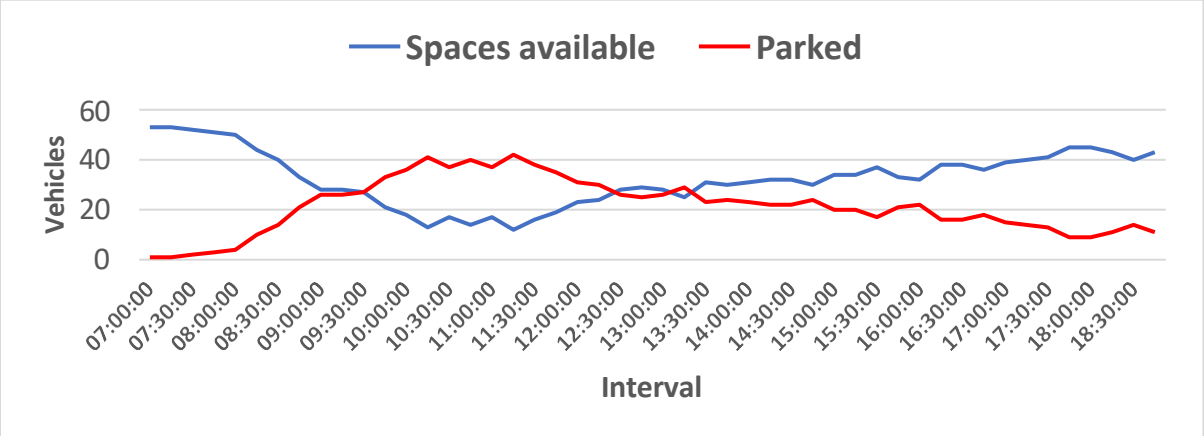


Figure 67. Tanner St N accumulation Thursday

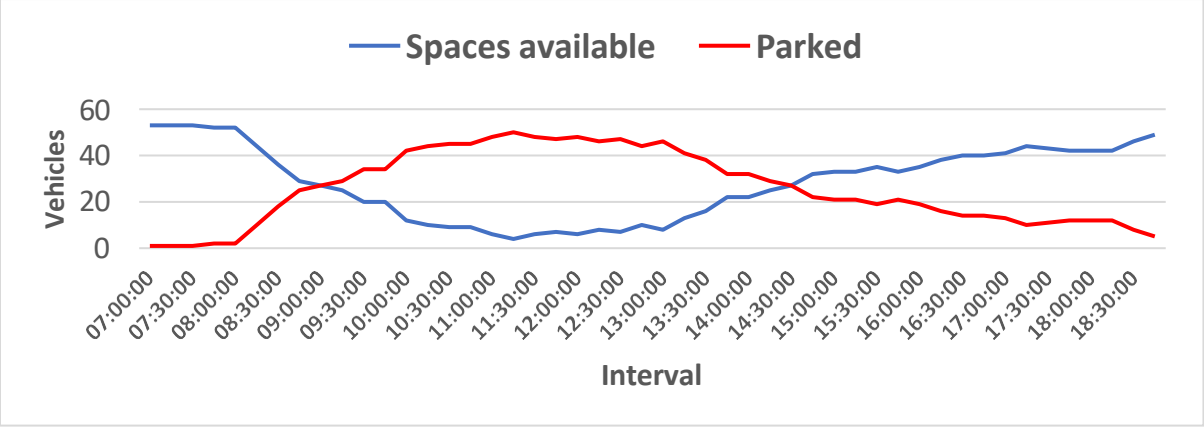
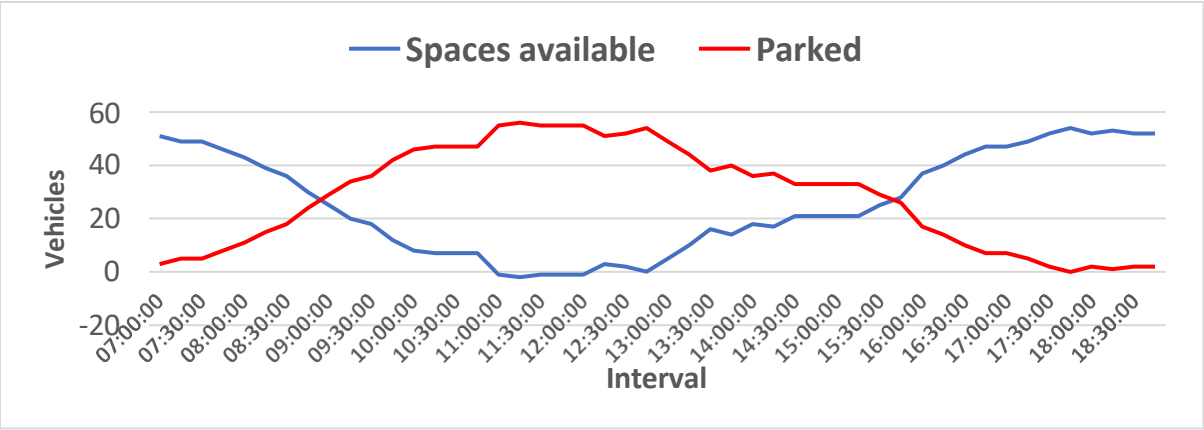
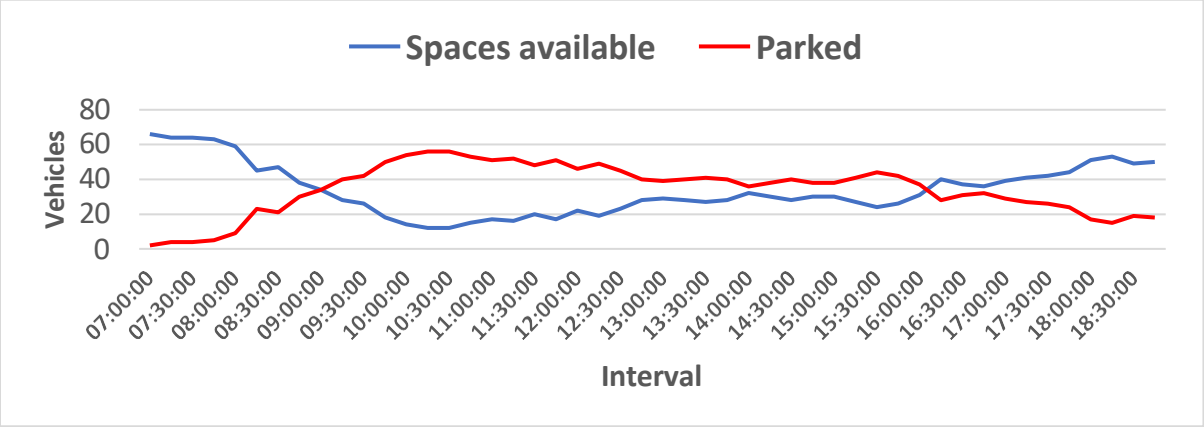


Figure 68. Tanner St N accumulation Saturday



Tanner Street South has a similar profile.

Figure 69. Tanner St S accumulation - Wednesday



Accumulation patterns at both sites suggest little overnight parking and a strong skew towards retail parking.

Thetford North – St Giles East, St Giles West, White Hart Street

St Giles East (St Giles Lane) and St Giles West (St Giles Upper) are located adjacent to King Street and were both surveyed. White Hart Street is located on land behind the row of buildings along White Hart Street.

The following car parks were not surveyed. St Nicholas Street is a concrete surfaced car park with unmarked bays. Breckland House is attached to the council offices, but available in the evenings and on weekends. Bus Interchange is a small-short stay car park ostensibly for taxi and cars to wait for bus passengers. Minstergate serves the attached large retail units. The site is owned by the Council but the car parking is held as part of the lease and we understand that as this car park is not part of the operational estate, it should be disregarded for charging at this stage,.

Figure 70. St Giles East accumulation Wednesday

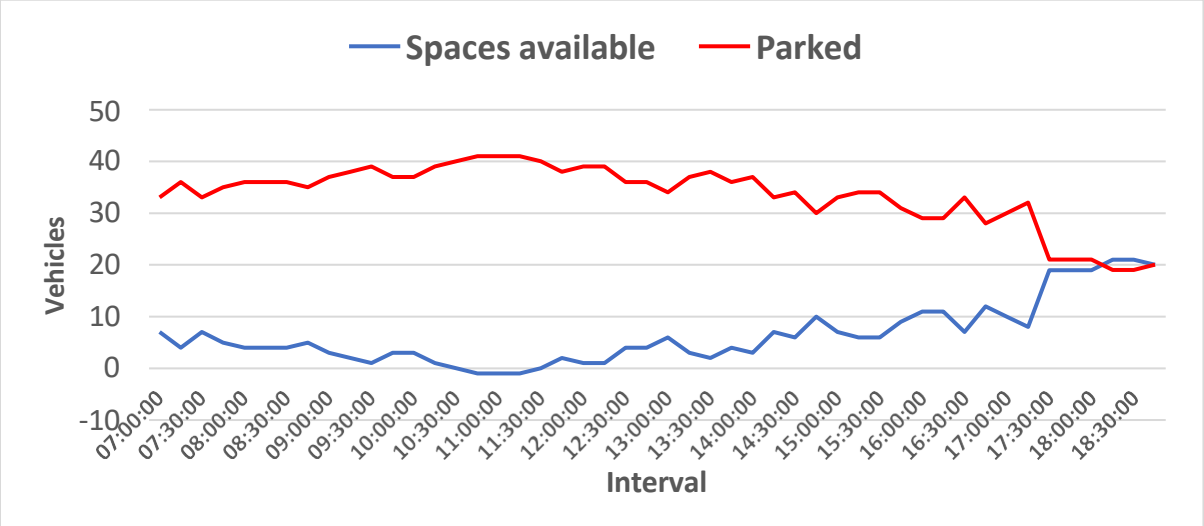


Figure 71. St Giles East accumulation Thursday

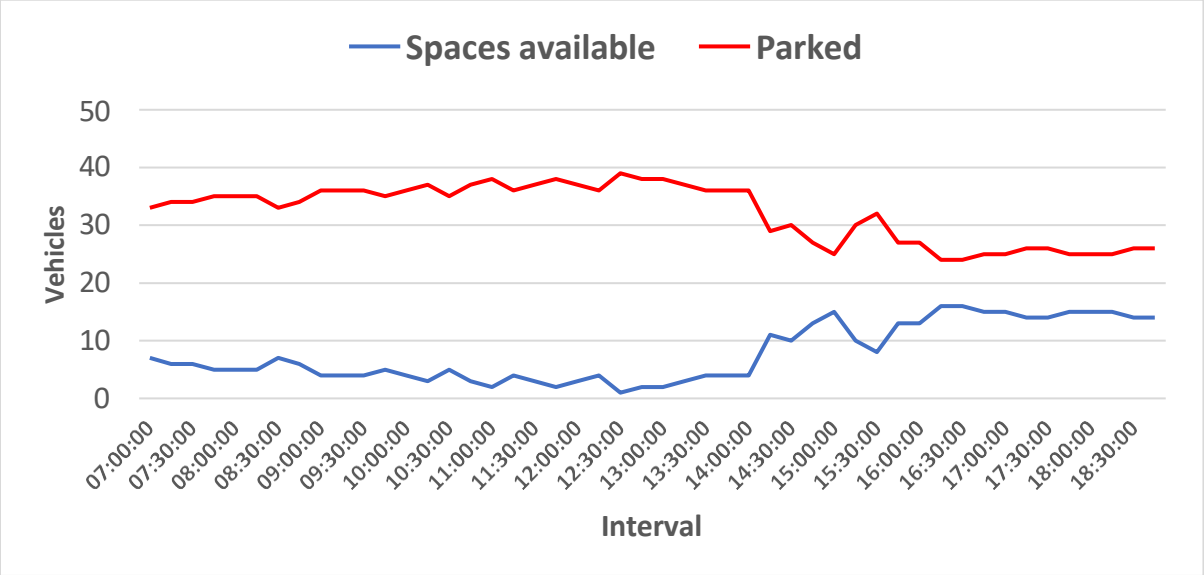
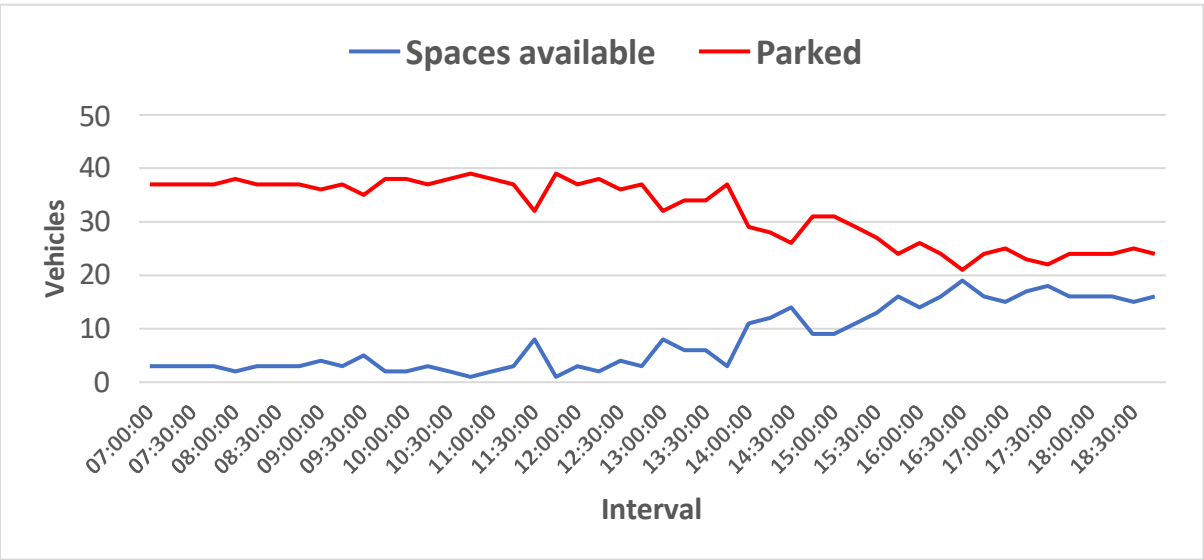


Figure 72. St Giles East accumulation Saturday



The start counts at St Giles East suggest some resident overnight parking. Trader's vans were observed which have a tendency to park early and leave early. There are a number of gates from gardens into the car park and limited on and off-street residential parking places in the local area.

Whilst carrying out the site visit at St Giles Lane East, we were asked by a visitor where they could pay, and they were very surprised when we informed them that the car park was free.

Figure 73. St Giles West accumulation Wednesday

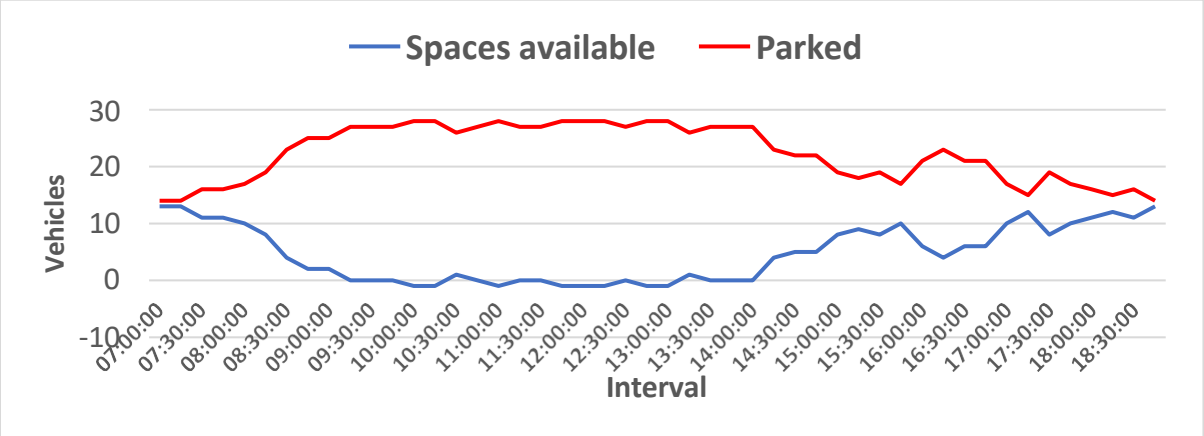


Figure 74. St Giles West accumulation Thursday

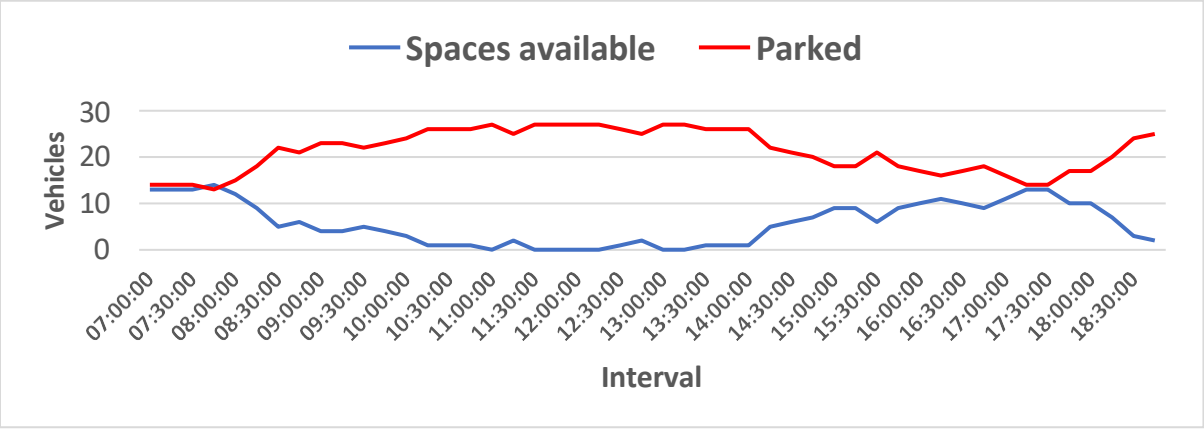
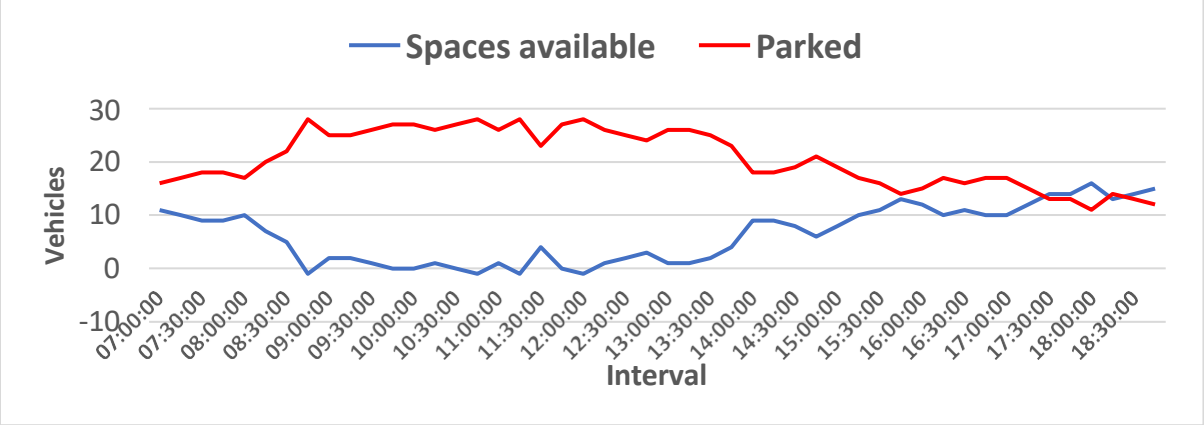


Figure 75. St Giles West accumulation Saturday



A very busy site which is full for much most of the workday. The high start and end counts suggest some residential use.

Figure 76. White Hart Street accumulation Wednesday

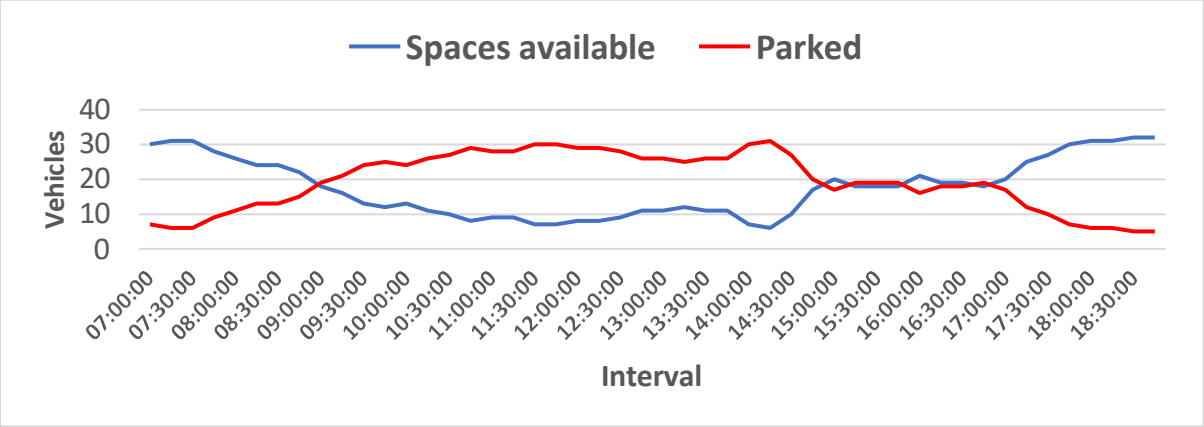


Figure 77. White Hart Street accumulation Thursday

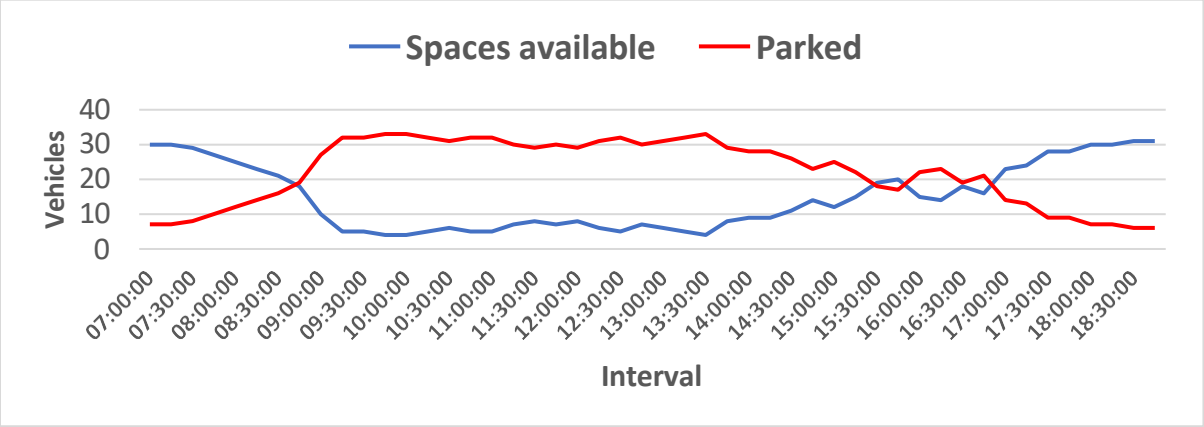
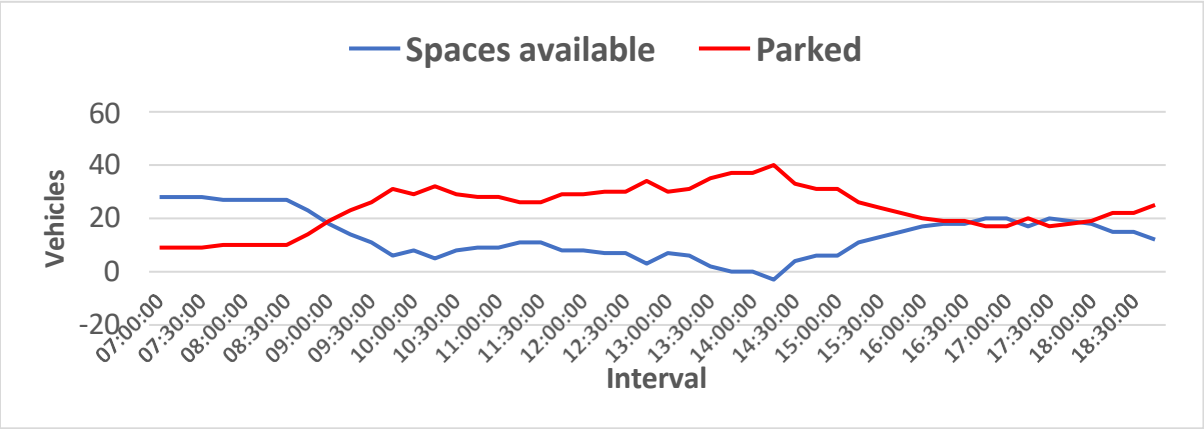


Figure 78. White Hart Street accumulation Saturday



The White Hart Street usage profile suggests retail commuting with strong demand throughout the day. There was no survey undertaking for Nicholas Street but at the time of the site visit it was around 90% full and we would expect, given its location, to have a similar occupancy profile to White Hart Street.

The Bus Interchange site is small with some bays being unusable due to foliage growth. Four bays are short stay, four reserved for blue badge holders and a further four for taxis.

Thetford South – Bridge Street and Bury Road.

Bridge St has been rebuilt as part of the hotel redevelopment and serves hotel guests.

Figure 79. Bridge St accumulation Wednesday

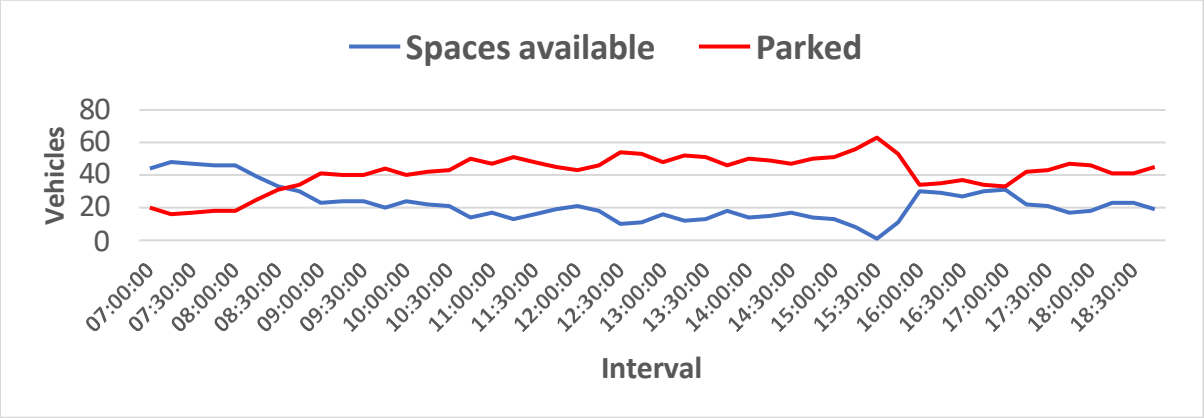


Figure 80. Bridge St accumulation Thursday

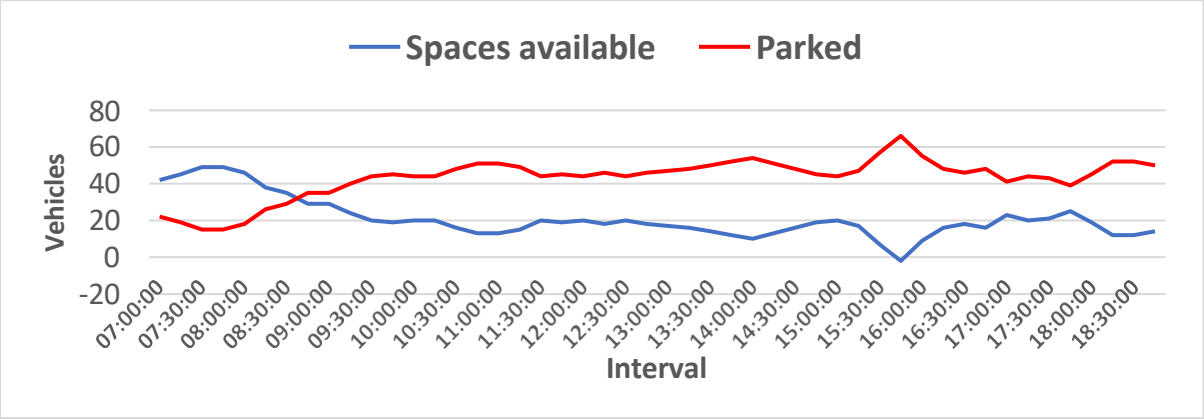
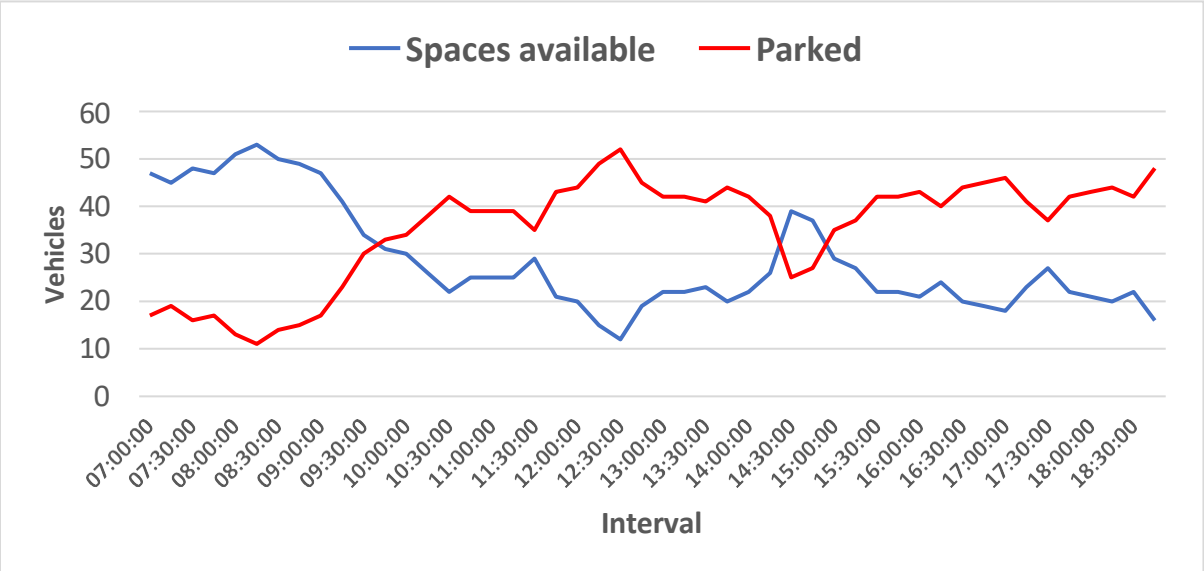


Figure 81. Bridge St accumulation Saturday



Reasonably high start/end counts can most likely be attributed to hotel guests. Other usage patterns suggest retail users as the site benefits from good pedestrian links to the shopping area.

Bury Road is located outside of the town centre to the south. There are playing fields to the south west, but these are part of the school. The only potential demand generators in the area are Henbury Court retirement housing complex and The Chase pub. Both of these have their own off-street parking.

Figure 82. Bury Road accumulation Wednesday

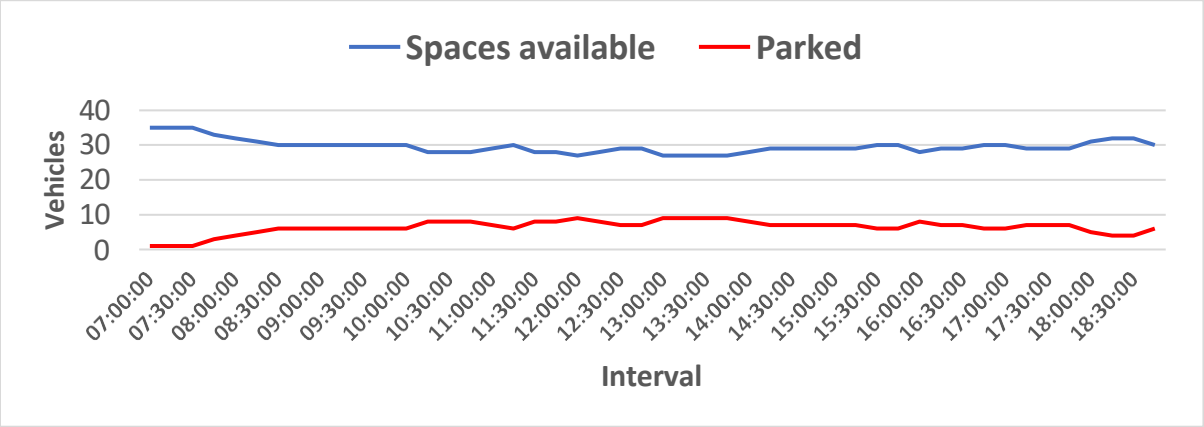


Figure 83. Bury Road accumulation Thursday

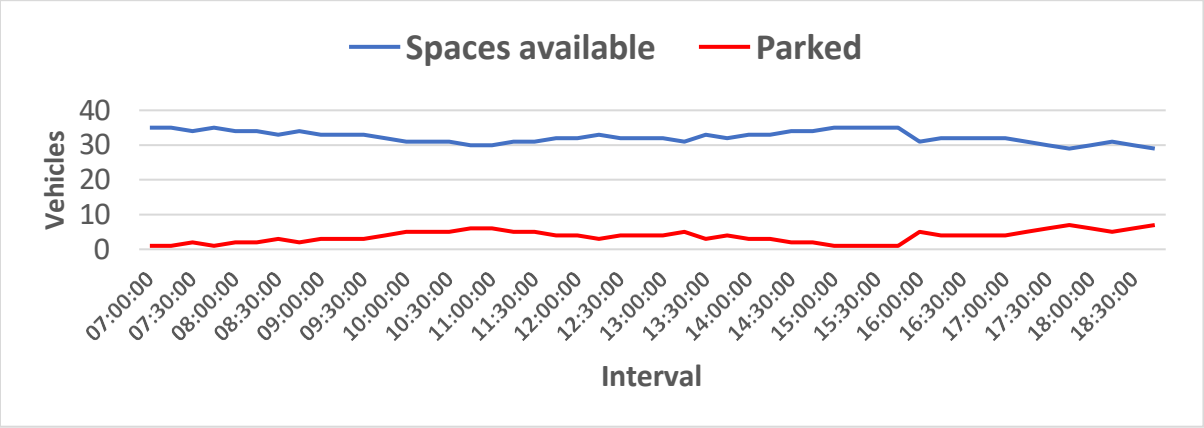
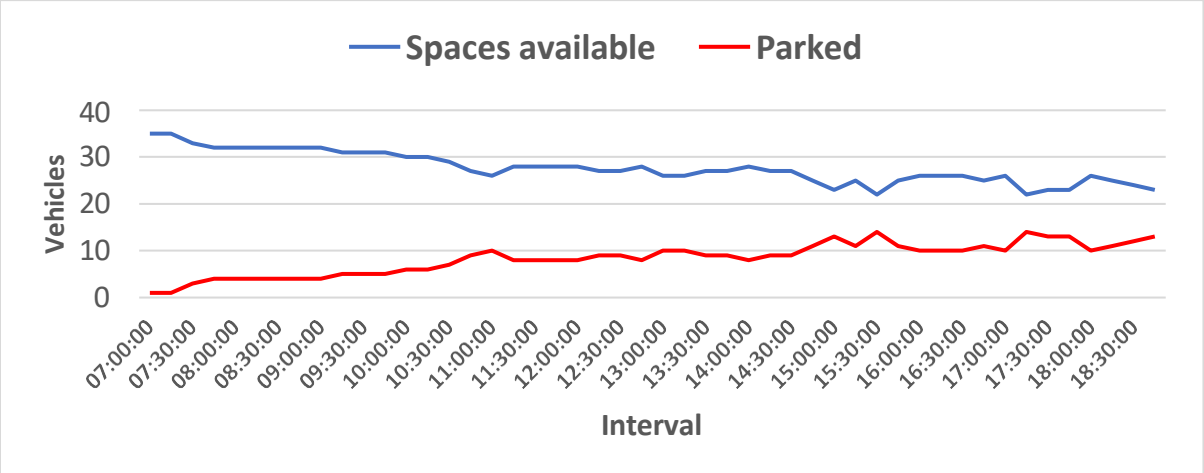


Figure 84. Bury Road accumulation Saturday



Bury Road is poorly used but has the highest proportion of longer stays of >3hrs. Combined with the low start and end counts (at least for the weekdays) we suggest commuter usage, possibly for the retirement home.

A summary of the Thetford sites is included below:

			THURSDAY					FRIDAY					SAT				
Town	Car Park	Capacity	START	09:00	13:00	16:00	END	START	09:00	13:00	16:00	END	START	09:00	13:00	16:00	END
Thetford	Bridge St	64	31%	64%	80%	53%	70%	41%	55%	73%	86%	78%	28%	27%	66%	67%	75%
Thetford	Bury Rd	36	3%	17%	25%	17%	17%	3%	8%	11%	14%	19%	3%	11%	28%	28%	36%
Thetford	Cage Lane	26	23%	85%	85%	88%	69%	15%	65%	85%	69%	50%	27%	73%	77%	77%	65%
Thetford	Pike Lane	85	11%	53%	81%	56%	74%	18%	65%	79%	56%	48%	15%	60%	96%	62%	65%
Thetford	St Giles West	27	52%	100%	104%	78%	52%	44%	85%	100%	63%	93%	52%	93%	96%	56%	44%
Thetford	St Giles East	64	52%	58%	53%	45%	31%	47%	56%	59%	42%	41%	58%	56%	50%	41%	38%
Thetford	School Lane	77	5%	75%	71%	57%	25%	5%	66%	78%	56%	17%	10%	35%	87%	35%	18%
Thetford	Tanners St North	54	0%	48%	48%	41%	20%	2%	50%	85%	35%	9%	6%	54%	91%	31%	4%
Thetford	Tanners St South	68	1%	50%	57%	54%	26%	10%	56%	88%	62%	22%	6%	57%	87%	44%	12%
Thetford	The Link	30	43%	57%	90%	80%	43%	40%	87%	100%	93%	67%	70%	100%	100%	77%	87%
Thetford	Whitehart St	37	19%	51%	70%	43%	14%	16%	73%	84%	59%	16%	27%	51%	81%	54%	68%

In general town centre car parks were busy at peak times during the week and on Saturday. The Link, St Giles West and East and Bridge Street are used overnight.

					Length of Stay			
Town	Car Park	Capacity	Least	Most	Churn	< 1hr	1 - 3 hrs	3hr >
Thetford	Bridge St	64	11	66	5.78	48	39	13
Thetford	Bury Rd	36	1	14	1.26	56	28	45
Thetford	Cage Lane	26	5	24	3.1	45	29	25
Thetford	Pike Lane	85	7	82	3.88	43	37	20
Thetford	St Giles West	27	11	28	3.62	62	22	16
Thetford	St Giles East	64	64	41	2.08	49	34	21
Thetford	School Lane	77	3	72	3.35	46	34	21
Thetford	Tanners St North	54	1	56	4.91	67	23	13
Thetford	Tanners St South	68	2	75	5.51	57	34	9
Thetford	The Link	30	12	33	5.4	53	27	19
Thetford	Whitehart St	37	5	40	3.54	50	30	21

7.5 Watton

Watton is the smallest town in scope with a population of only 7,000 forming a settlement centred on a historic a cross roads.

Watton has an adopted neighbourhood plan (NP) which notes:

"Concern has been raised about a reduced retail experience and decline in High Street and the Wednesday market footfall. The COVID-19 pandemic, has had a major impact nationally on retailing and the shape of town centres."

The NP notes an older population profile to the rest of Breckland and vulnerability to flooding. There are three BDC car parks in Watton.

Goddards Close

Goddards Close car park is bust during the day and shows a usage profile which suggests retail use with some commuting use. The site exceeded official capacity in some periods, with out of bay parking. We noted abandoned cars and overgrown bays on the site visit.

Figure 85. Goddards Court accumulation - Thursday

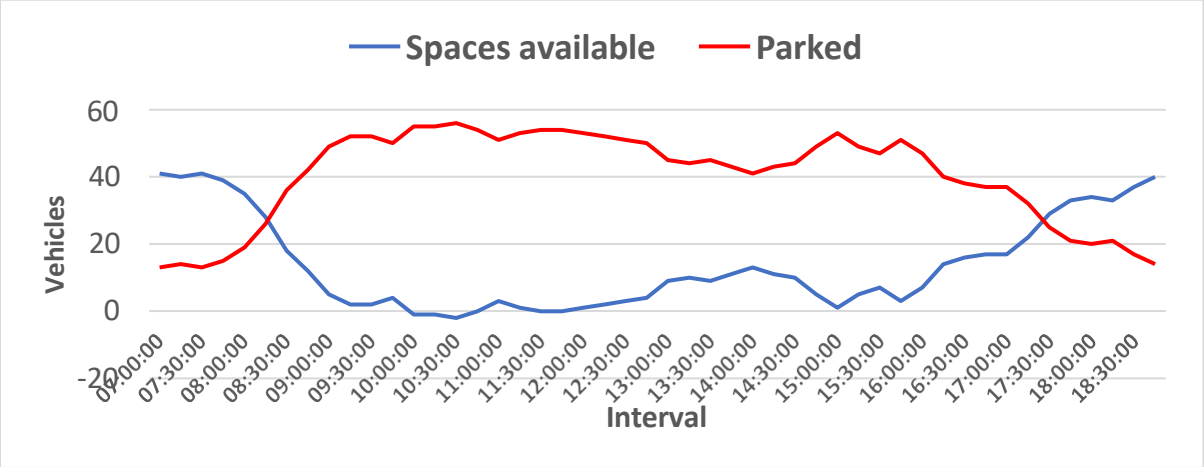
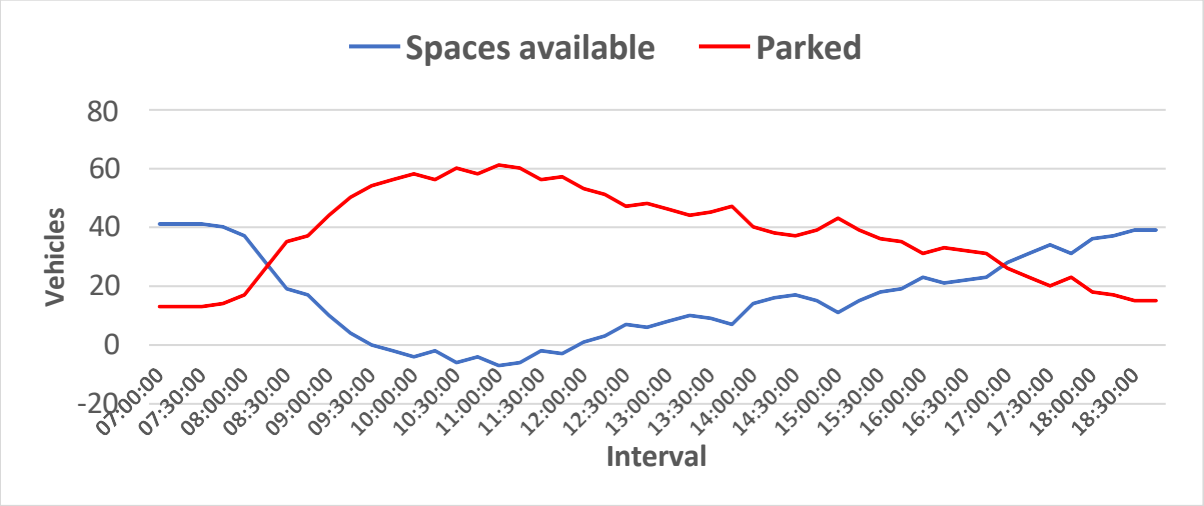


Figure 86. Goddards Court accumulation - Saturday



Memorial Way

Memorial Way car park serves the east of the High Street. The car park has reasonably high turnover and reached 90% full in the mid-morning on Thursday and 80% on Saturday for a short period.

Figure 87. Memorial Way accumulation Thursday

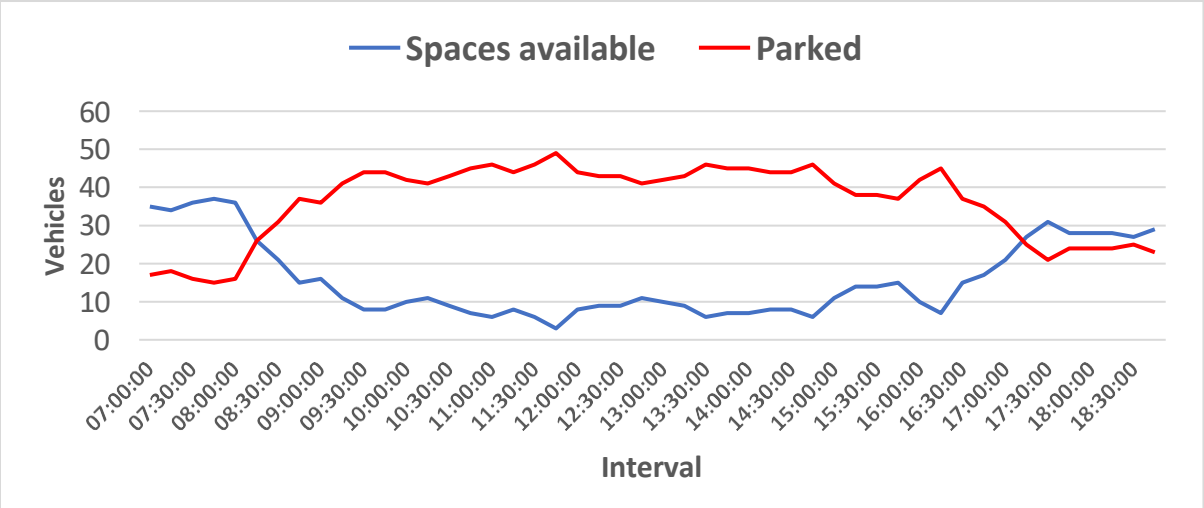
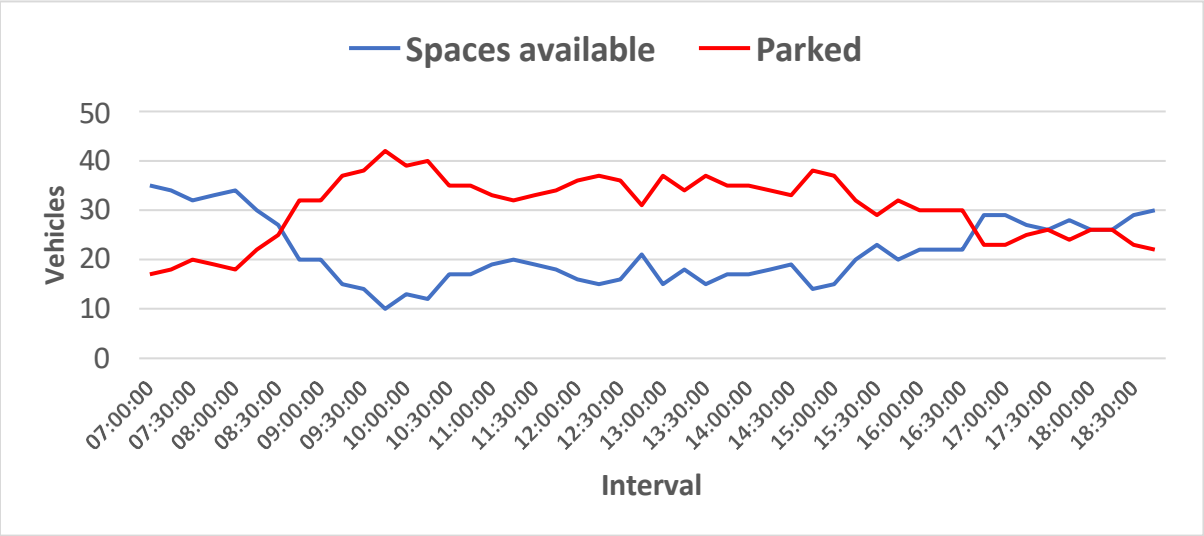


Figure 88. Memorial Way accumulation - Saturday



Kittle Close

Kittle Close is less full and less busy that the other two sites, reflecting its less convenient location in relation to shops and services. The site was very not very well used the whole day on Saturday.

Figure 89. Kittle Close accumulation - Thursday

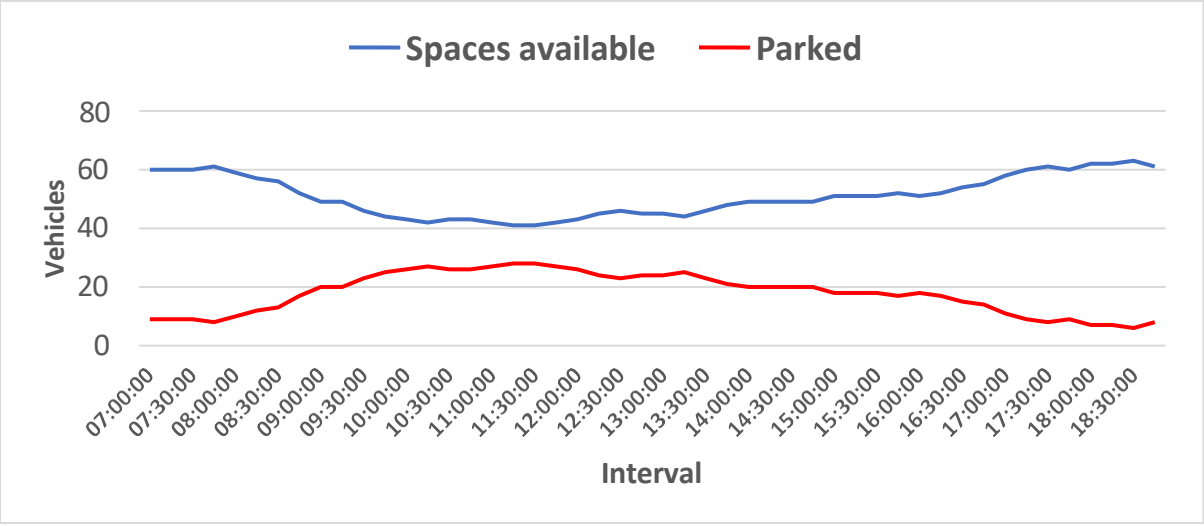
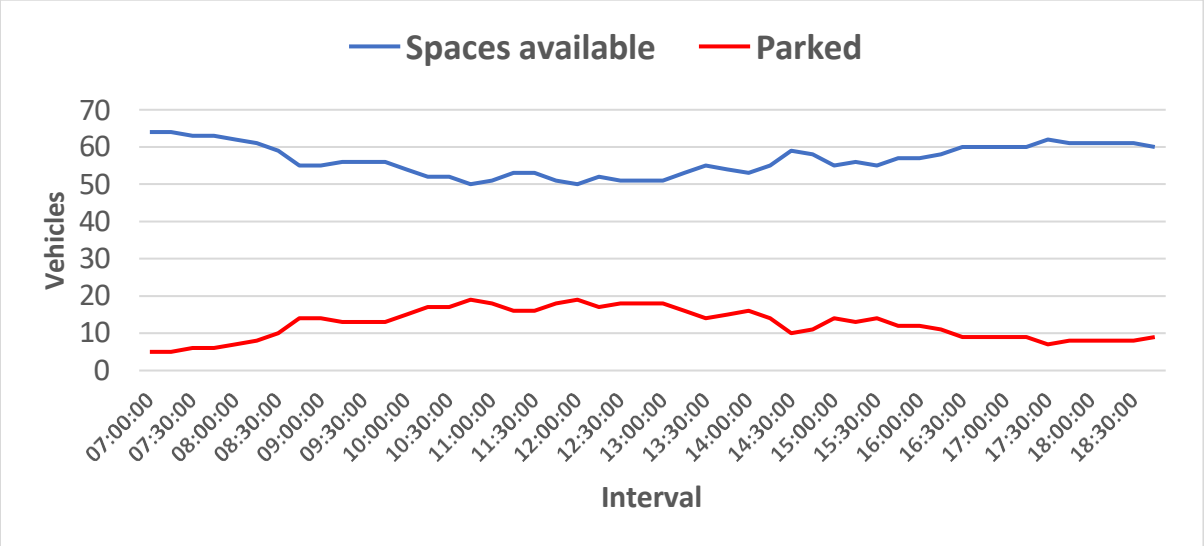
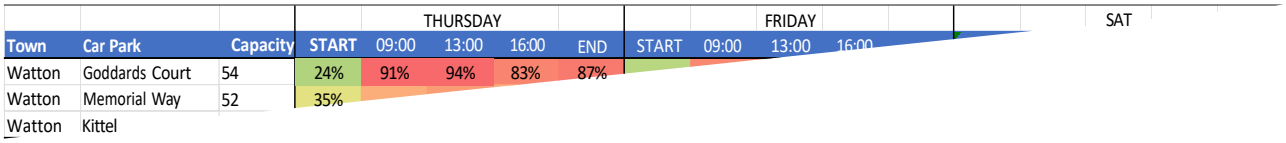


Figure 90. Kittle Close accumulation - Saturday



As summary of the Watton sites is shown below:



Although Goddards Court is very used throughout the day, almost three quarters of this parking is for under an hour. This will make enforcement expensive. Memorial Way is reasonably well used and at points exceeded the 80% threshold. Kittle Close is not very well used and also has a high proportion of longer stays over 3hrs suggesting residents and commuter use.

					Length of Stay			
Town	**Car Park**	**Capacity**	**Least**	**Most**	**Churn**	**< 1hr**	**1 - 3 hrs**	**3hr >**
Watton	Goddards Court	54	13	61	7.2	73	16	11
Watton	Memorial Way	52	15	46	3.42	53	24	23
Watton	Kittel Close	69	5	35	1.11	48	23	32

12. Overall conclusions

The rurality of the district means that many residents need to use their cars, and this is reflected in Census and DVLA data on car use and ownership. This will create increasing pressure on both on and off-street parking.

Norfolk County Council and Breckland Borough Council have policies in place to manage single occupancy car use and support actions including the Local Transport Plan and the Breckland 2035 Sustainability Strategy.

The transport policy position and previous studies including one in 2012 and another 2015 have established the principle that tariffs should be applied in most of BCC car parks.

Local knowledge has been confirmed by the surveys which show conclusively that many of Breckland's car parks are reasonably full for much of the day. However, the picture is very mixed, with different usage patterns, user profiles and levels of use across the parking estate.

8.1 Next Stage

Having established the baseline Appendix 3 consider the appropriate tariff levels, potential displacement if charging is brought in. Appendices 4-6 then consider the management, technology and other processes that must be put in to place to deliver the implementation of charges in Breckland.

Breckland Car Park Strategy

Appendix 3 – Car Park Charging Implementation

Contents

13. Introduction

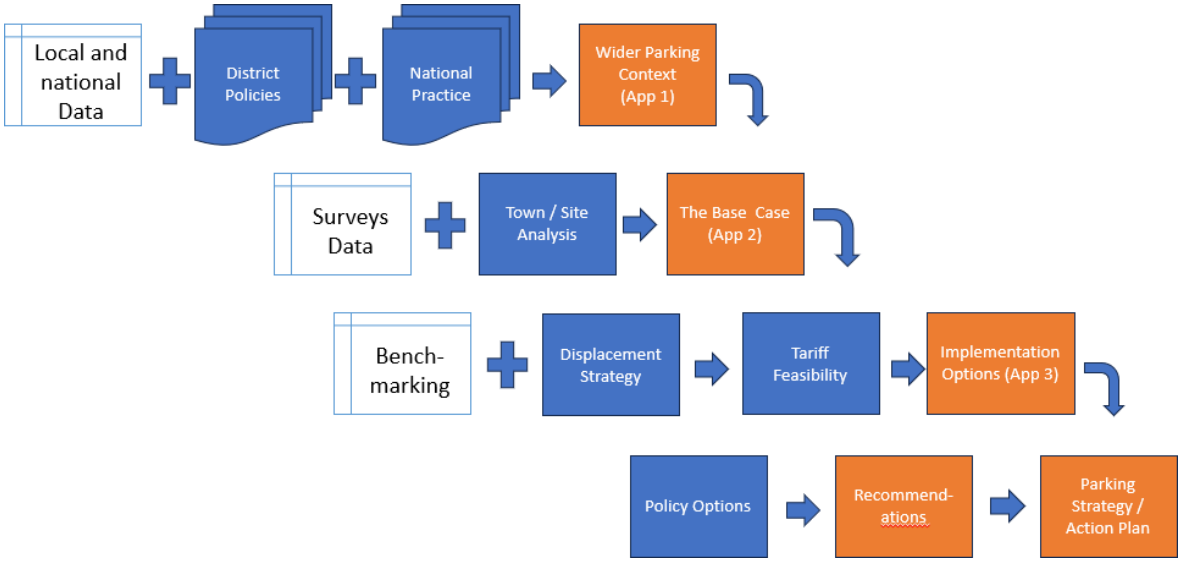
Parking Matters Ltd (PML) have been commissioned by Breckland District Council (the Council) to provide input into the Council's review of parking strategy in the district.

This Appendix outlines the specific policy options available to BDC in light of the work outlined in the previous appendices and considers the feasibility and implications of bringing in a tariff regime with recommendations for how this should be done alongside an action plan.

8.2 Methodology

Having considered relevant national and local data, BDC policies, national parking practice in Appendix 1; Surveys data and a detailed analysis of the towns and sites in Appendix 2; this Appendix will consider the specific feasibility of tariffs and the strategic options available for implementation.

Figure 91. Methodology Summary Diagram



14. Tariff Benchmarking

Tariffs are a significant tool used to manage the finite resource parking by influencing driver behaviour, for example, to encourage churn and protect short-term parking.

Tariff levels and structure depend on the objectives of the operator. A retail park or shopping centre is likely to set tariffs to encourage medium dwell times and discourage the 'wrong' sort of parking such as commuters. A private operator is likely to set tariffs to maximise income. For local authorities tariff setting is more complex due to the need to balance a range of policy objectives, as well as political influences.

In order to consider the type of tariffs that could be applicable to the towns in Breckland we have considered tariffs charged in other towns which are in the broadest sense comparable geographically or by virtue of their retail and service offers to the Breckland towns. This draws on our previous experience of working across the country in similar districts and settlements.

There is a wide variation of tariffs which reflects the local conditions and politics and we aware of some places on the list actively reviewing tariffs at time of writing (such as Uttlesford). Which towns are comparable is of course open to interpretation, but they are presented as useful tool to inform, compare and consider appropriate tariff levels.

Table 1. Tariffs for comparison

		WEEKDAYS & SATURDAYS (hrs)						EVENING	SUNDAYS (hrs)						SEASONS	
Town	Location	0.5	1	2	3	4	Day		0.5	1	2	3	4	Day	6	12
Thornbury	S Glos.	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Soham	Cambridgeshire	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Yatton	North Somerset	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Harleston	Norfolk	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Cuckfield	West Sussex	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hadleigh	Suffolk	£0.00	£0.00	£0.00	£0.00	£3.00	£3.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Aylsham	Norfolk	£0.00	£0.00	£0.00	£0.00	MAX	MAX	£0.00	£0.00	£0.00	£0.00	£0.00	MAX	MAX	£0.00	£0.00
Holbeach	Lincolnshire	£0.00	£0.00	£0.00	£0.50	£0.70	£1.20	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Calne	Wiltshire	£0.00	£0.00	£0.00	£2.00	£2.60	£5.50	£0.00	£0.80	£0.80	£0.80	£0.80	£0.80	£0.80	£302.00	£603.00
Thame	Oxfordshire	£0.00	£0.00	£1.00	£2.00	£2.00	£2.40	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£567.00
Biggleswade	Bedfordshire	£0.00	£0.00	£1.50	£1.50	£2.00	£5.00	£0.00	£0.00	£0.00	£1.50	£1.50	£2.00	£5.00	£153.00	£275.00
Halesworth	Suffolk	£0.00	£1.00	£1.00	£2.00	£2.00	£4.00	£0.00	£0.00	£0.00	£1.00	£4.00	£4.00	£4.00	£0.00	£650.00
Stansted Mt.	Essex	£0.40	£0.60	£1.00	£1.20	£2.00	£4.70	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£220.00	£420.00
Great Dunmow	Essex	£0.40	£0.60	£1.20	£1.20	£2.00	£3.50	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£175.00	£300.00
Buckingham	Buckinghamshire	£0.60	£0.60	£0.60	£0.60	£1.10	£2.60	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Crewkerne	Somerset	£0.65	£0.65	£0.85	£2.15	£2.15	£2.15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Saffron Walden	Essex	£0.70	£0.70	£1.20	£1.20	£2.00	£3.50	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£175.00	£300.00
Royston	Hertfordshire	£0.70	£0.70	£1.35	£1.35	£3.95	£3.95	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£399.00	£740.00
Haverhill	Suffolk	£0.70	£0.70	£1.40	£2.10	£2.80	£2.80	£0.00	£0.70	£0.70	£1.40	£2.10	£2.80	£2.80	£0.00	£450.00
Aylesbury	Buckinghamshire	£0.80	£1.50	£2.50	£2.50	£4.00	£8.00	£0.00	£1.50	£1.50	£1.50	£1.50	£1.50	£1.50	£770.00	£1,540.00
Newmarket	Suffolk	£1.00	£1.00	£1.00	£1.50	£3.00	£3.00	£0.00	£1.00	£1.00	£1.00	£1.50	£3.00	£3.00	£0.00	£0.00
Great Malvern	Worcestershire	£1.00	£1.00	£1.00	£2.00	£2.00	£3.00	£1.50	£1.00	£1.00	£1.00	£2.00	£2.00	£3.00	£0.00	£0.00
Burgess Hill	West Sussex	£1.00	£1.00	£1.50	£2.50	£3.70	£5.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£195.00	£650.00
Bishops Stortford	Essex	£1.00	£1.00	£2.00	£2.60	£3.50	MAX	£0.00	£1.50	£1.50	£1.50	£1.50	£1.50	£1.50	£0.00	£0.00
Fakenham	Norfolk	£1.20	£1.20	£1.20	£2.00	£2.80	£6.00	£0.00	£1.20	£1.20	£1.20	£2.00	£2.80	£6.00	£122.00	£204.00
Bury St Edmunds	Suffolk	£2.50	£2.50	£2.50	£2.50	£3.00	£3.00	£1.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£468.00
Tiverton	Devon	£2.70	£2.70	£2.70	£4.00	£4.00	£15.00	YES	£2.70	£2.70	£2.70	£4.00	£4.00	£15.00	£250.00	£460.00
Ely	Cambridgeshire	£3.00	£3.00	£3.00	£3.00	£3.00	£3.00	£0.00	£3.00	£3.00	£3.00	£3.00	£3.00	£3.00	£0.00	£506.00

When considering the 'price per minute', longer stays tend to offer a discount. This includes transaction costs such as card charges and pay-by-phone costs and places the on 2-3hrs stays, which are often considered to be the best time period for towns as they result in a mix of retail and leisure purchases such as shopping and a café visit, but promote churn and protect capacity.

Figure 92.(right)

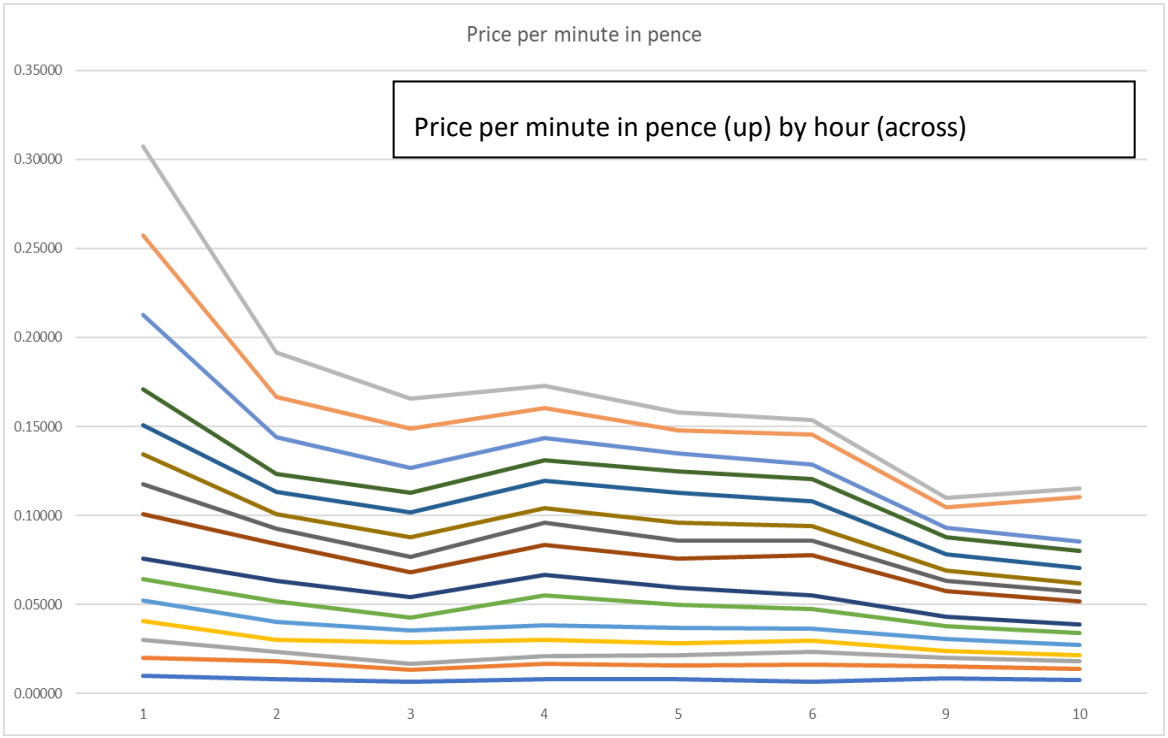


Figure 93. Neighbouring Districts and Towns

		WEEKDAYS & SATURDAYS									EVENING	SUNDAY	Annual
Town	Site	0.5	1	2	3	4	5	6	9	All day			Permit
Bury St Edmunds	Ram Meadows	£2.50	£2.50	£2.50	£2.50	£3.00	£3.00	£3.00	£3.00	£3.00	£1.00	No	£468.00
Bury St Edmunds	Parkway MSCP	£3.00	£3.00	£3.00	£3.00	£4.00	£4.00	£4.00	£4.00	£4.00	£1.00	Yes	£624.00
Diss (ss)	Weavers Court	£0.00	£0.00	£1.00	£2.00	£5.00	MAX	MAX	MAX	MAX	No	No	£350.00
Diss (ls)	Church St	£0.00	£0.00	£1.00	£2.00	£3.00	£4.00	£4.00	£4.00	£4.00	No	No	n/a
Fakenham	Queens Rd	£1.20	£1.20	£1.20	£2.00	£2.80	£3.60	£4.40	£5.20	£6.00	No	Yes	£204.00
Kings Lynn	St James MSCP	£2.00	£2.00	£3.10	£3.80	£4.30	£5.10	£6.30	£10.10	£12.60	No	Yes	n/a
Wynmondham	Town Green	£0.00	£0.00	£1.00	£2.00	£3.00	MAX	MAX	MAX	MAX	£0.00	No	£350.00
Wynmondham	Morrisons	£0.50	£0.50	£1.00	£1.50	£2.00	£2.50	£3.00	£3.00	£3.00	£3.00	Yes	n/a

10.1 Attleborough and Swaffham

For the purposes of benchmarking Attleborough and Swaffham can be considered together. Both are attractive small market towns with historic centres serving rural hinterlands. Both have a small selection of restaurants and pubs which stay open in the evening.

For other historic small market towns, we have considered Biggleswade, Thame, Holbeach, Wantage and Fakenham as broadly comparable towns in the south and east of England.

Figure 94. Attleborough and Swaffham – short stay

Town	1 Hr	2 Hrs	3 Hrs	4 Hrs	3 Hrs Av.
Attleborough / Swaffham	**£0.00**	**£0.00**	**£0.00**	**£0.00**	**£0.00**
Newton Aycliffe	£0.00	£0.00	£0.00	£0.00	£0.00
Penzance (w)	£1.00	£1.00	£2.00	£3.00	£0.72
Gillingham	£1.20	£1.20	£1.70	£2.70	£0.79
Holbeach	£0.00	£0.00	£0.00	£0.50	£0.00
Biggleswade	£0.00	£0.00	£1.50	£1.50	£0.17
Thame	£0.00	£0.00	£1.00	£2.00	£0.11
Wantage	£0.00	£0.00	£1.50	£2.10	£0.17
Fakenham	£1.20	£1.20	£1.20	£2.00	£0.73

There is a wide variation in tariffs in smaller settlements as a result of local politics rather than variation in the market rate. Free periods are common with average hourly tariffs over 3hrs is c.£0.50 per hour where charged.

Figure 95. Attleborough and Swaffham – long stay

Town	All Day	Season ticket price (p.a.)	Equivalent 5 day daily rate	Discount
Attleborough / Swaffham	**£0.00**	**£0.00**	**£0.00**	**0%**
Newton Aycliffe	£0.00			
Penzance (w)	£6.00			
Gillingham	£5.40	£446.00	£1.86	66%
Holbeach	£1.20			
Biggleswade	£5.00	£275.00	£1.15	77%
Thame	£2.40	£567.00	£2.36	2%
Wantage	£6.10	£551.00	£2.30	62%
Fakenham	£6.00	£204.00	£0.85	86%

Few comparators provide all day free parking. Daily rates average c.£4.30 where charged. Discount rates arising from season tickets vary significantly, from 2% in Thame to 86% in Fakenham, albeit this is a specific ticket for a beach front car park, likely aimed at locals.

10.2 Dereham

Dereham is the second largest settlement in this study and has double the retail floorspace (363,620 ft^2 v 181,000 ft^2) of Swaffham. It also has a relatively active evening economy including a cinema.

We have considered Royston, Rochester, Holbeach, Great Dunmow, Buckingham, Newmarket and Burgess Hill as broadly comparable towns in the south and east of England.

Figure 96. Dereham – short stay

Town	1 Hr	2 Hrs	3 Hrs	4 Hrs	3 Hrs Av.
Dereham	**£0.00**	**£0.00**	**£0.00**	**£0.00**	**£0.00**
Thornbury	£0.00	£0.00	£0.00	£0.00	£0.00
Rotherham	£0.50	£0.50	£1.00	£2.00	£0.36
Royston	£0.70	£0.70	£1.35	£1.35	£0.50
Rochester	£1.20	£1.20	£1.70	£2.20	£0.79
Holbeach	£0.00	£0.00	£0.00	£0.50	£0.00
Great Dunmow	£0.40	£0.60	£1.20	£1.20	£0.37
Buckingham	£0.60	£0.60	£0.60	£0.60	£0.37
Newmarket	£1.00	£1.00	£1.00	£1.50	£0.61
Burgess Hill	£1.00	£1.00	£1.50	£2.50	£0.67

Most comparators charge for parking and there is a wide variance in tariffs but with an average hourly tariff over 3hrs of c.£0.40 per hour.

Figure 97. Dereham – long stay

Town	All Day	Season ticket price (p.a.)	Equivalent 5 day daily rate	Discount
Dereham	**£0.00**	**£0.00**	**£0.00**	**0%**
Thornbury	£0.00			
Rotherham	£3.00			
Royston	£3.95	£740.00	£3.08	22%
Rochester	£6.50	£776.00	£3.23	50%
Holbeach	£1.20			
Great Dunmow	£3.50	£300.00	£1.25	64%
Buckingham	£2.60			
Newmarket	£3.00			
Burgess Hill	£5.00	£650.00	£2.71	46%

All day rates range from £1.20 to £6.50 with an average of £3.20.

10.3 Thetford

Thetford is a historic market town with a good retail offer and modest night time economy. We considered Saffron Walden, East Grinstead, Hitchen, Bedford, Bury St Edmunds and Ely as geographic comparators as they are around the same size, in rural areas, and have historic attractions.

Figure 98. Thetford – short stay.

Town	1 Hr	2 Hrs	3 Hrs	4 Hrs	3 Hrs Av.
Thetford	**£0.00**	**£0.00**	**£0.00**	**£0.00**	**£0.00**
Tredegar	£0.00	£0.00	£0.00	£0.00	£0.00
Fleetwood	£1.00	£1.00	£2.00	£2.00	£0.72
Winton	£1.20	£1.20	£1.70	£2.90	£0.79
Broadstairs (town)	£1.10	£1.10	£2.20	£3.30	£0.79
Saffron Walden	£0.70	£0.70	£1.20	£1.20	£0.48
East Grinstead	£1.00	£1.00	£1.50	£2.50	£0.67
Hitchin (ls)	£1.25	£1.25	£1.25	£2.30	£0.76
Bedford	£1.30	£1.30	£1.90	£3.00	£0.86
Bury St Edmunds	£3.00	£3.00	£3.00	£3.00	£1.83
Ely	£3.00	£3.00	£3.00	£3.00	£1.83

Comparators show charges of c.£0.40-£0.70p per hour over three hours. Both Ely and Bury St Edmunds offer flat rates of £3 for up to 4 hours.

Longer stay rates also vary, not just by town but by car park within them with all day rates averaging £3.68 per day.

Figure 99. Dereham – long stay

Town	All Day	Season ticket price (p.a.)	Equivalent 5 day daily rate	Discount
Thetford	**£0.00**	**£0.00**	**£0.00**	**0%**
Tredegar	£0.00			
Fleetwood	£3.50	£300.00	£1.25	64%
Winton	4 HR MAX			
Broadstairs (town)	£6.00			
Saffron Walden	£3.50	£300.00	£1.25	64%
East Grinstead	£5.00	£780.00	£3.25	35%
Hitchin (ls)	£4.55			
Bedford	£7.20	£1,425.00	£5.94	18%
Bury St Edmunds	£4.00			
Ely	£3.00	£506.00	£2.11	30%

Longer stay rates also vary, not just by town but by car park within them with all day rates averaging £3.68 per day.

Only Bury St Edmunds and Fleetwood charge evening rates. Only Broadstairs, Fleetwood, Bury St Edmunds and Broadstairs charge on a Sunday.

10.4 Watton

The small market town of Watton is a linear settlement of 7,000 population along a high street which includes a number of national chains and independent traders. There is a Tesco on the eastern side of the town centre. As well as Council parking, Watton Town Council provide a free parking site south of the High Street.

We have selected five comparators: Soham, Yatton, Harleston, Halesworth and Cuckfield.

Figure 100. Watton – short stay.

Town	1 Hr	2 Hrs	3 Hrs	4 Hrs	3 Hrs Av.
Watton	£0.00	£0.00	£0.00	£0.00	£0.00
Soham	£0.00	£0.00	£0.00	£0.00	£0.00
Yatton	£0.00	£0.00	£0.00	£0.00	£0.00
Harleston	£0.00	£0.00	£0.00	£0.00	£0.00
Halesworth	£0.00	£1.00	£1.00	£2.00	£0.00
Cuckfield	£0.00	£0.00	£0.00	£0.00	£0.00

It is not common for settlements with this level of retail offer to charge for parking unless capacity is constrained and demand needs to be managed as a result of limited supply, perhaps due to tourism.

15. Demand Elasticity and Displacement Analysis

Demand elasticity as a result of changes to, or introduction of tariffs is hard to predict and dependent on a number of factors;

- Demand. The quality of the offer and draw of the location. This includes demand for retail, leisure, tourism and commuting. The biggest 'unknowns' are macro-economic factors or events (such as Covid-19) which cannot be foreseen
- Supply. The supply of parking and the provision of alternatives such as on-street parking and other parking providers such as supermarkets
- Substitute Goods. Specifically, the provision of modal alternatives such as good reliable public transport, walking and cycling routes, and working from home
- Cultural / behavioural factors. For example, a rural area without a history of charged for parking may experience a dramatic reduction in demand, at least for a period.

According to the Institute for Transport Studies, University of Leeds, the introduction of parking charges designed to recover the costs of provision, where parking was previously free, can result in reductions in car commuting of up to 30% (Hess, 2001). Kelly and Clinch (2006) report that price sensitivity is higher for non-business than business trips. The level of reduction will also be dependent upon whether there are reasonable alternative to using the car park, such as free on street parking or cheaper public transport.

The impact on short stay visits will generally be less as the convenience of the location and the availability of spaces are a much greater influencing factors for shoppers, then commuters who are more likely to walk large distances to save or avoid parking expenditure. Resident parking is also likely to reduce significantly during periods when charges apply.

From our experience the reduction in parking demand will be highest in the first year following the implementation of charges, with levels varying depending on the settlement, site and alternative parking options available. We would however expect demand to partly recover over the following years as people get used to paying for the convenience that the off street car park estate provides.

Note on methodology for assessing demand elasticity and displacement

We do not have occupancy data for on-street parking or non-BBC off-street parking. Displacement is discussed with reference to prior experience, observations during the site visit, local knowledge, and desk based tools such as Google Earth and Bing satellite and streetview. The maps in each section below assess supply as follow:

- Off-street parking provided by others, for example, leisure centres, supermarkets, retails parks and town councils
- On-street sections are categorised as;
  - 'No parking' such as formal TROs in place including yellow lines, clearways, bus stops, zebra crossings etc. or narrow roads and lanes where parking would cause obstruction in the Highway Code.
  - 'Restricted' which includes shorter stay parking under 3hrs, sections where marked parking bays exist but are clearly related to nearby properties or sections of highway where driveways and entrances make parking impractical
  - 'Unrestricted' sections where parking is largely unrestricted (less driveways etc).

On-street sections are generalised and do not identify individual bays, driveways, entrances etc. and only seek to give a broad view of the availability of parking.

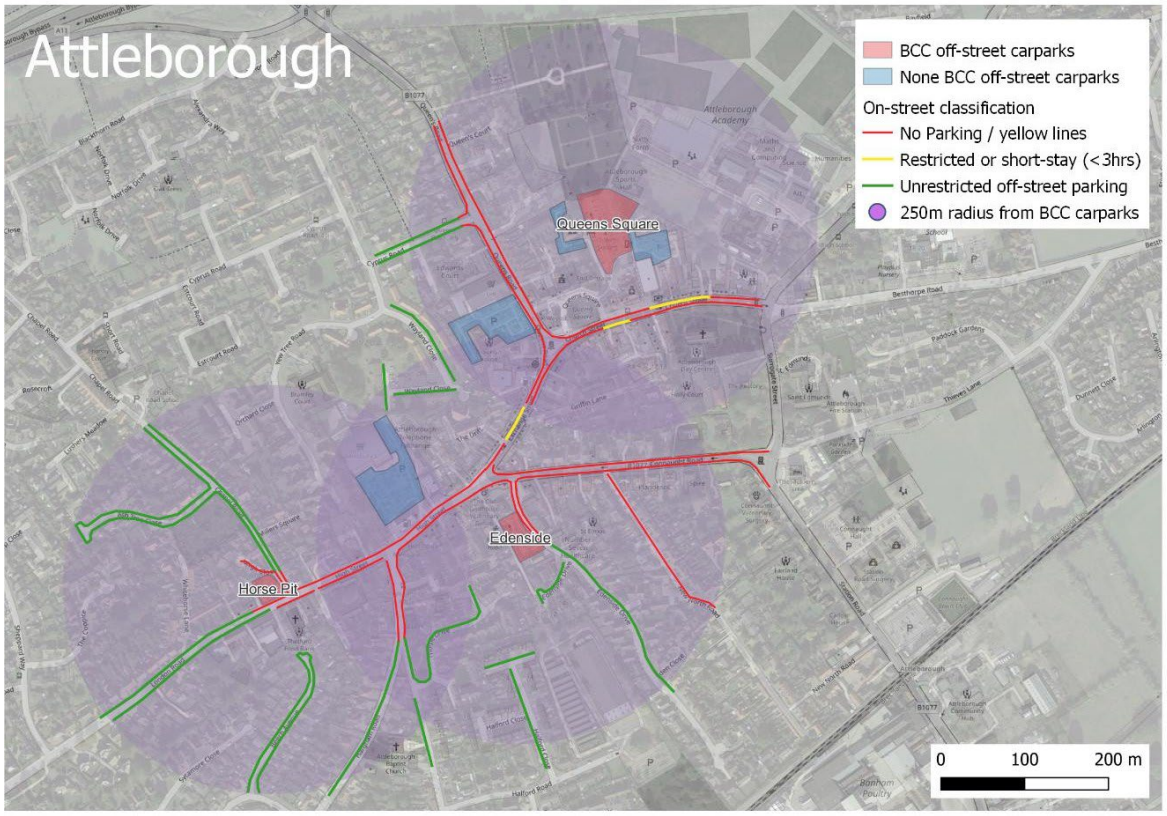
The next sections of this appendix consider the impact of implementing charges in each town, together with our recommended tariffs at each car park.

16. Attleborough

Appendix 2 – The Base Case set out a detailed understanding of the town. In summary, parking in the town is already pressured, especially at Edenside which was 50% full even overnight. A planned Urban Extension to south of railway will deliver 4,000 new homes which is likely to have some upward impact on demand even with demand management and mode choice improvements.

The highest combined demand across the three survey days and sites was 146/177 or around 80% on Friday afternoon. The highest recorded occupancy of Queens Square was up to 40% on Friday. Horse Pit was consistently well occupied but with a low turnover suggesting high residential use.

Figure 101. Availability of other parking



4.1 Displacement

Parking is under some pressure in Attleborough, and restrictions are in place on the main highway routes throughout the town centre.

There is little on or off-street parking around Queens' Square that's not associated with a specific use such as the pharmacy, surgery, or supermarket. These already have parking restrictions in place. Any displacement would likely occur some distance from the car park, for example on estate roads around Cyprus Rd. Overall, there are not many options for close by displacement.

From the surveys we can be fairly confident that a good deal of the parking at Edenside is by residents. If charges were brought in and no reasonably priced residents permit was offered, we could expect to see a great deal of displacement onto surrounding streets. Edenside Drive has a low

parking capacity due to the number of driveways and would only be suitable for parking on one side of the carriageway, or could result in verge and pavement parking.

Horse Pit. There's ample parking on-street around this site and little in the way of local trip generators. The surveys are reasonably clear that much of the parking is residential, so displacement could well be dramatic with few users choosing to pay to park in this site if charges are introduced.

Considering the availability of alternative provision, we would broadly estimate displacement levels as below, i.e. reduction in parking levels.

Table 2. Broad estimate of reduction arising from displacement as a result of tariff introduction

Site	Year 1	Year 2	Year 3
Queens Sq.	30%	10%	5%
Edenside	40%	15%	10%
Horse Pit (if charged)	80%	70%	70%

4.2 Tariff Strategy

There is a clear case for charging at Queens Square and Edenside to manage the sites and pay for upkeep. There is no clear case for implementing charging at Horse Pit given that the parking is likely to be displaced into surrounding streets. This undermines the business case when the capital costs of equipment and ongoing revenue cost of enforcement are considered.

As in line with norms, the focus for visitors and long stay should be Queens Square as the larger site with more capacity. To serve the local businesses and better manage traffic by reducing on-street parking, we recommend Edenside is short stay with a product for residents to minimise the impact on local streets.

In proposing tariffs, we have considered other historic small market towns such as Biggleswade, Newmarket, Crewkerne, Thame, Haverhill, Royston, Wantage and Fakenham as broadly comparable towns in the south and east of England.

We generally advise against 30min tariffs on ground of their impact on payment compliance levels unless more frequent civil enforcement officer patrols are deployed. Also payment card transactions costs represent a much greater proportion of lower tariff payments.

4.3 Specific Site Proposals

The current pay and display machines at Queens Square are well placed and can be replaced in-situ. With ticketless parking and pay by phone the number of physical terminals could be reduced to one. There are no obvious opportunities for re-design or extension; expanding to the north and east of the site, would require the removal of mature trees and green spaces or onto land not controlled by the council. There are proposals to renew the leisure centre with Queens Sq. acting as the centre's car park. In our experience leisure centre traffic peaks between 08:00-10:00 and after 16:00, which should complement other demand such as retail and boost the efficiency of the site.

In Edenside, a payment terminal could be located in the top north east corner by the vehicle exit.

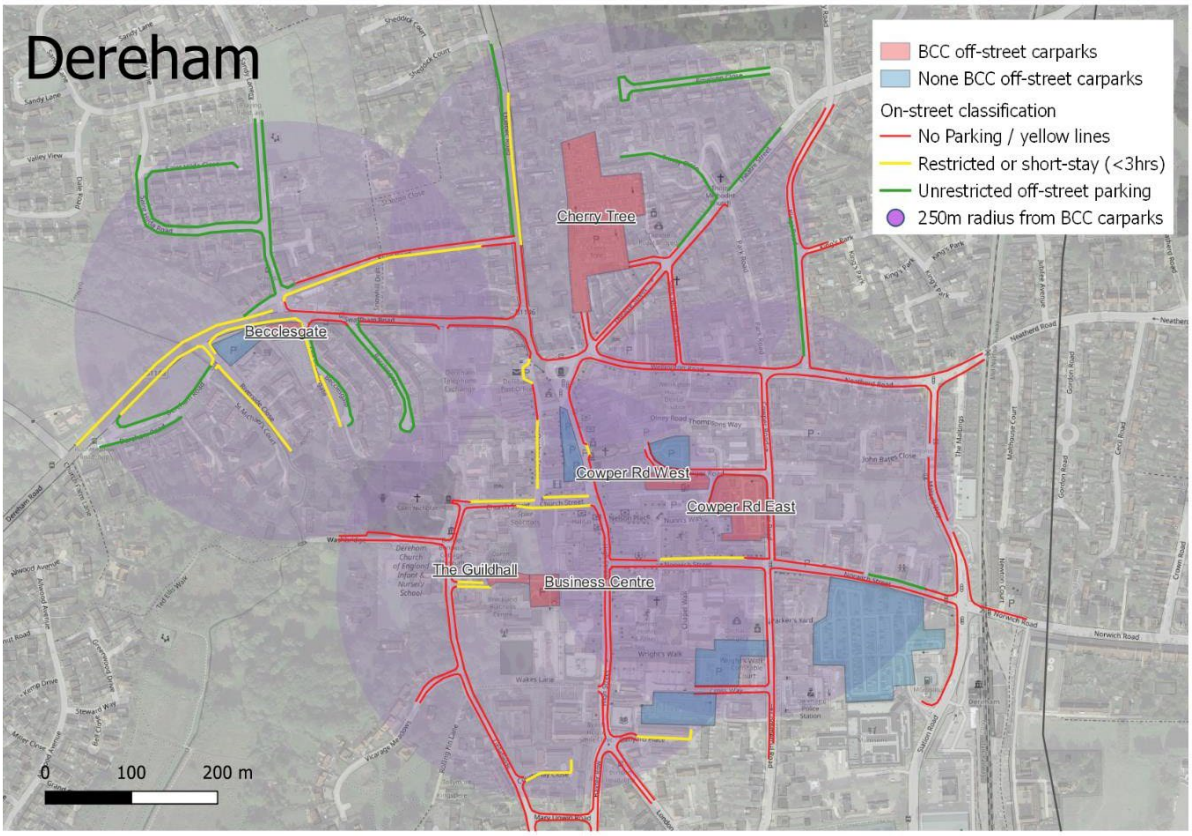
We do not recommend tariffs in Horse Pit on the grounds of capital cost and ongoing enforcement costs given the strong likelihood of displacement onto local streets.

18. Dereham

The Base Case set out a more detailed understanding of the town. In summary, Dereham is the second largest settlement in this study and has double the retail floorspace (363,620 ft^2 v 181,000 ft^2) of Swaffham. It also has a relatively active evening economy including a cinema. There are proposals to remove the 17 parking spaces from Market Place. The Town Delivery Plan notes good retail offer and large hinterland.

Cherry Tree is the largest car park and reached c.70% full on Wednesday/Thursday although less busy on Saturday. The Cowper Lane sites are complicated with the western section providing access to the rear of properties. Becclesgate reaches high occupancy levels during the day and appears to have high overnight residential use. Guildhall is busy early/late and was full most of the day with less parking on Saturday.

Figure 102. Availability of other parking



6.1 Displacement

Introducing tariffs in the town will result in displacement initially with occupancy recovering assuming tariffs are reasonable. Dereham has a large amount of alternative parking to the south of town centre at Dereham Shopping Centre. This already has a 3-hour limit with a £55 penalty charges for non-compliance. We would expect enforced limits to be introduced at the Co-op and other private car parks in the town centre once tariffs in BDC car parks are in place.

Displacement, especially of long stay, could well be back to pre-charging levels within a few years because of the limited alternatives.

Table 3. Broad estimate of parking demand reduction as a result of tariff introduction

Site	Year 1	Year 2	Year 3
Cherry Tree	30%	10%	5%
Cowper Land	40%	20% (assuming private providers enforce their sites)	10%
Business Centre	30%	10%	5%
Becclesgate (if charged)	80%	60%	60%

Given the availability of alternative parking and the distance from the town centre we would expect many of the current users of Becclesgate to change their behaviour and park elsewhere to avoid tariffs if introduced.

6.2 Tariff Strategy

There is a clear case for charging Cherry Tree, Cowper Lane and the Business Centre to manage the sites and pay for upkeep. There is a weak business case for implementing charging at Becclesgate at the present time given the alternative supply nearby the case for which is further undermined by the capital costs of equipment, site surfacing and lining, and the ongoing enforcement and maintenance costs.

Longer stay and commuters should be encouraged into Cherry Tree as the larger site with some remaining capacity. Cowper Rd should be protected for shorter stays to better serve the retail and services in the town centre. Despite its size, long stay tariffs should be available in Business Centre to support the employers and the commercial viability of the office space (owned by BDC).

In proposing tariffs, we have considered other vibrant market towns such as Tiverton, Ely, Royston, Saffron Walden, Stansted Mountfitchet as broadly comparable towns in the south and east of England.

Again we would generally advise against 30min tariffs.

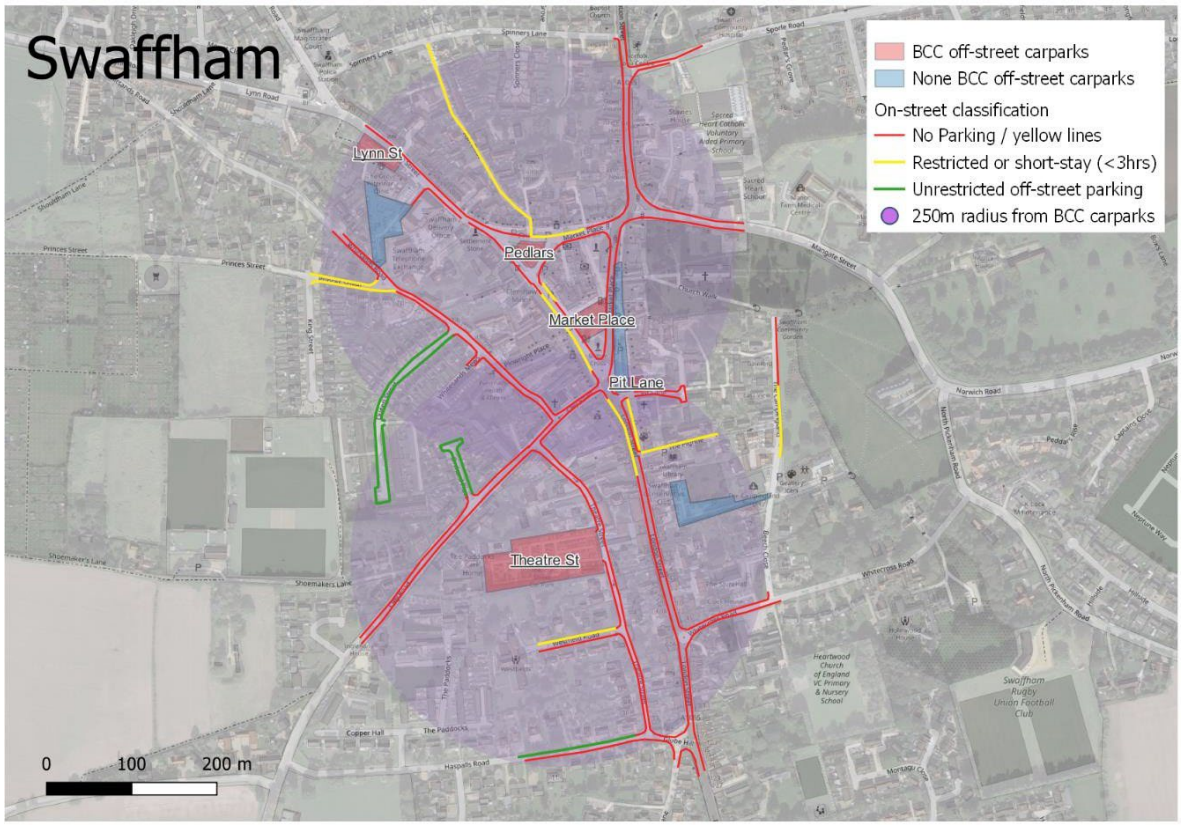
6.3 Specific Proposals

Ticketless parking where users enter their registration plates into terminals will reduce the number of terminals required as customers won't need to return to their vehicles with tickets. In Cherry Tree, two machines will likely be needed given its size. One at the motorcycle spaces by the southern exit and another by the main vehicle entry/exit. In Cowper Lane, a terminal by the western exit with a second at the eastern pedestrian exit onto Cowper Rd given the turnover. Pay by phone should be in place and promoted from day one. There are no obvious opportunities for major re-design or extension although a detailed study by an engineer may yield 3-4 more spaces at Cowper Rd.

19. Swaffham

The Base Case set out a more detailed understanding of the town. The surveys showed strong demand for off-street parking with even the Theatre St, the largest site >70% full on Saturday.

Figure 103. Availability of other parking



7.1 Displacement

The on-street county managed parking along Market Place is limited to two-hours and other on-street and alternative off-street parking is heavily limited in the town centre. This should reduce the amount of displacement once tariffs are introduced. The ASDA supermarket already has restrictions in place and can be expected to enforce these strictly if problems arise. Even where on-street parking is legal, these sections already appear to be under pressure; for example, Queen St and Westfield Rd.

Displacement, especially of long stay, could well be back to pre-charging levels within a few years.

Table 4. Broad estimate of reduction arising from displacement as a result of tariff introduction

Site	Year 1	Year 2	Year 3
Theatre St	30%	10%	5%
Pedlars / Market Place	30%	10%	5%
Pit Lane		Depending on regime	

Lynn St is already full for most of the day with local users. Station Yard is used predominantly for the business centre and HGVs and is too far from the town centre to be considered useful to all but commuters. Pit Lane has low utilisation at present.

7.2 Tariff Strategy

There is a clear case for charging in car parks to better manage the sites and pay for upkeep with the exception of Lynn St and Station Yard.

Longer stay and commuters should be encouraged into Theatre Street as the larger site with Pedlars and Market Place for short stay to better serve the retail and services in the immediate area.

In proposing tariffs we have considered other vibrant small market towns such as Newmarket, Ely, Aylsham, Cuckfield, as broadly comparable towns in the south and east of England. There would appear to be less demand for residents parking in the off-street car parks in Swaffham.

We generally advise against 30min tariffs on ground of compliance and enforcement.

7.3 Specific Proposals

Ticketless parking will reduce the number of payment terminals required. In Theatre Street two terminals are recommended given its size on the hardstanding by the north east corner assuming pay-by-phone is in from day-one.

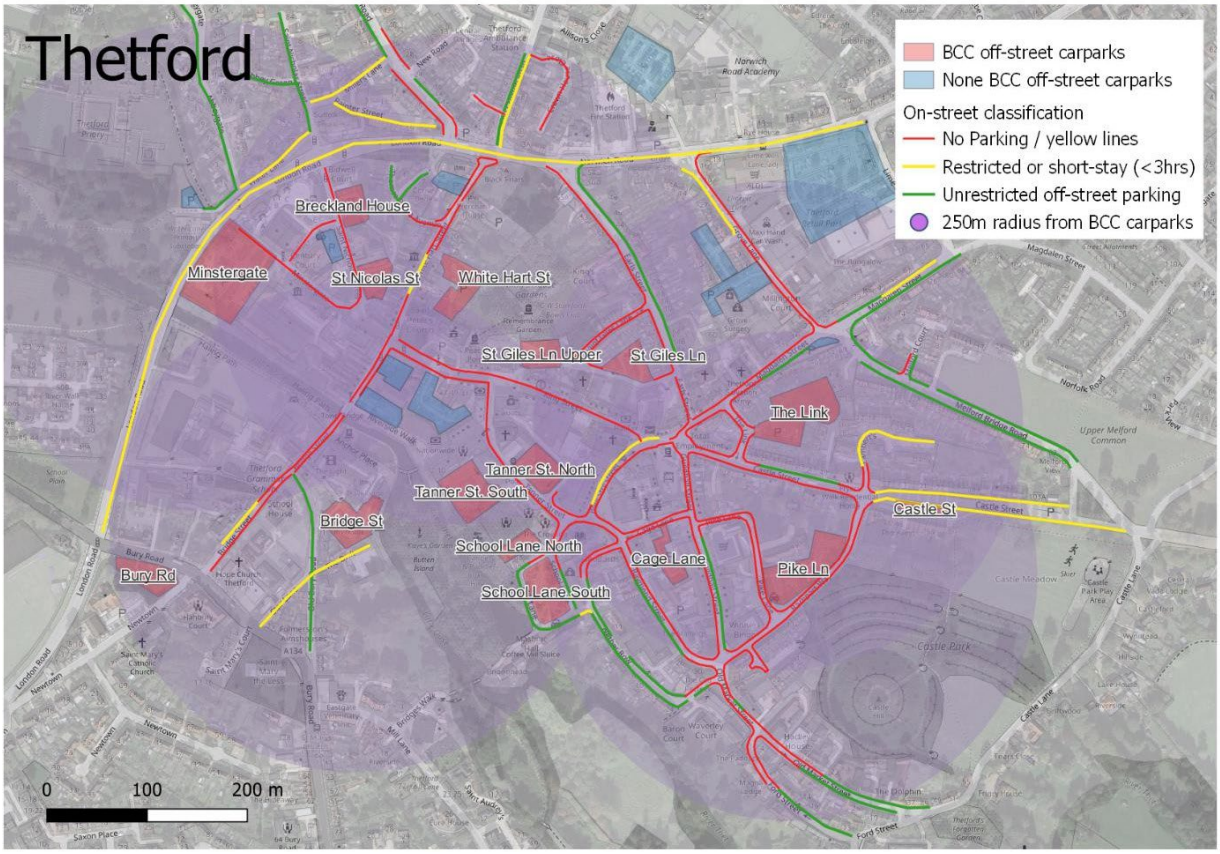
We would agree with previous studies that Pit Lane should either be used for a special use such as EV charging or just turned over to public open space (perhaps with the opportunity for a kiosk) as the voucher parking scheme and enforcement in force at present will be costing BBC money and the site is poorly used.

Pedlars and Market Place could share a terminal in market Place with pay by phone in place.

20. Thetford

The Base Case sets out a more detailed understanding of the town. In summary, Thetford is a very historic market town with a good retail offer, modest night time economy, and nationally known tourist attractions close by. Central car parks were busy with all but St Giles East exceeding 75% full during the Saturday surveys.

Figure 104. Availability of other parking



8.1 Displacement

Thetford's limited supply of alternative off-street and unrestricted on-street parking will reduce displacement levels for the centrally located car parks. There are on-street sections where parking may well be legal which are unlikely to be attractive to drivers because they are too narrow or perceived as putting the vehicle at risk. These are marked 'restricted' / yellow on the map above and examples include London Rd and the narrow streets around Cage Lane. We consider specific areas of the town below.

In the Town Centre West area, Castle St car park is already very busy but could be impacted by tariffs in Pike Lane. Further out, there are already restrictions in place at the Aldi supermarket and the other privately operated parking at the retail park can be expected to be quickly managed by their operators should problems arise.

In the Town Centre North area there is some limited parking on Earl St and at Grove Surgery. Grove surgery can be managed by the operator if required.

The Riverside / School Lane area is potentially the most problematic as it includes on-street parking on the streets surrounding School Lane and on Nether Row which is limited to one side of the

carriageway. It can be expected that this unrestricted on-street space around the car parks will fill when tariffs are introduced.

In the north and west of the town centre, we would expect some displacement to Minstergate and St Nicolas Street if these remain tariff free although they are already busy, so the displacement opportunity is limited.

In the core, the Bell Inn car park is already Pay and Display, further evidence that tariffs are viable in the town. There is also some private parking south of King St which is permit holder only and managed by Euro car parks. All other on-street parking is restricted.

Table 5. Broad estimate of reduction arising from displacement as a result of tariff introduction

Site	Year 1	Year 2	Year 3
Town Centre West	20%	15%	5%
Town Centre North	30%	10%	5%
Riverside	30%	15%	5%
Riverside (Bridge Street)		Depending on arrangement with hotel	

The situation on effected streets will need to be monitored with Norfolk County Council where intervention is needed to protect resident amenity and traffic safety. Part of the tariff strategy should be to set tariffs at a reasonable level to discourage anti-social on-street parking.

8.2 Tariff Strategy

There is a clear case for charging across the town to better manage traffic, support policy and increase churn to support retail and services. There are no large 'destination' car parks such as Cherry Tree in Thetford but instead many medium and small car parks. Longer stay commuters should be encouraged into the outlying car parks of Minstergate, Bridge St, Pike Lane and School Lane, with the smaller car parks prioritised for shorter stays.

In proposing tariffs we have considered other medium historic market towns such as Saffron Walden, East Grinstead, Aylesbury and Royston, as broadly comparable towns in the south and east of England. There would appear to be significant demand from residents to park off-street.

We generally advise against 30min tariffs on ground of compliance and enforcement.

8.3 Specific Proposals

There is some council owned land north of The Link which could be utilised to expand the car park. Survey data suggests that from a commercial perspective a surface car park here is likely to have a good business case. However, there are quite significant constraints in the form or mature trees. Ecology and tree surveys would be required at the feasibility stage.

The lease agreements at Minstergate and agreement with the Travelodge at Bridge Street need to be examined. With current technology, managing hotel and retail customers will be reasonably simple as long as paperless ticketing is introduced.

With pay by phone available from day-one, the likely equipment requirements are suggested as follows:

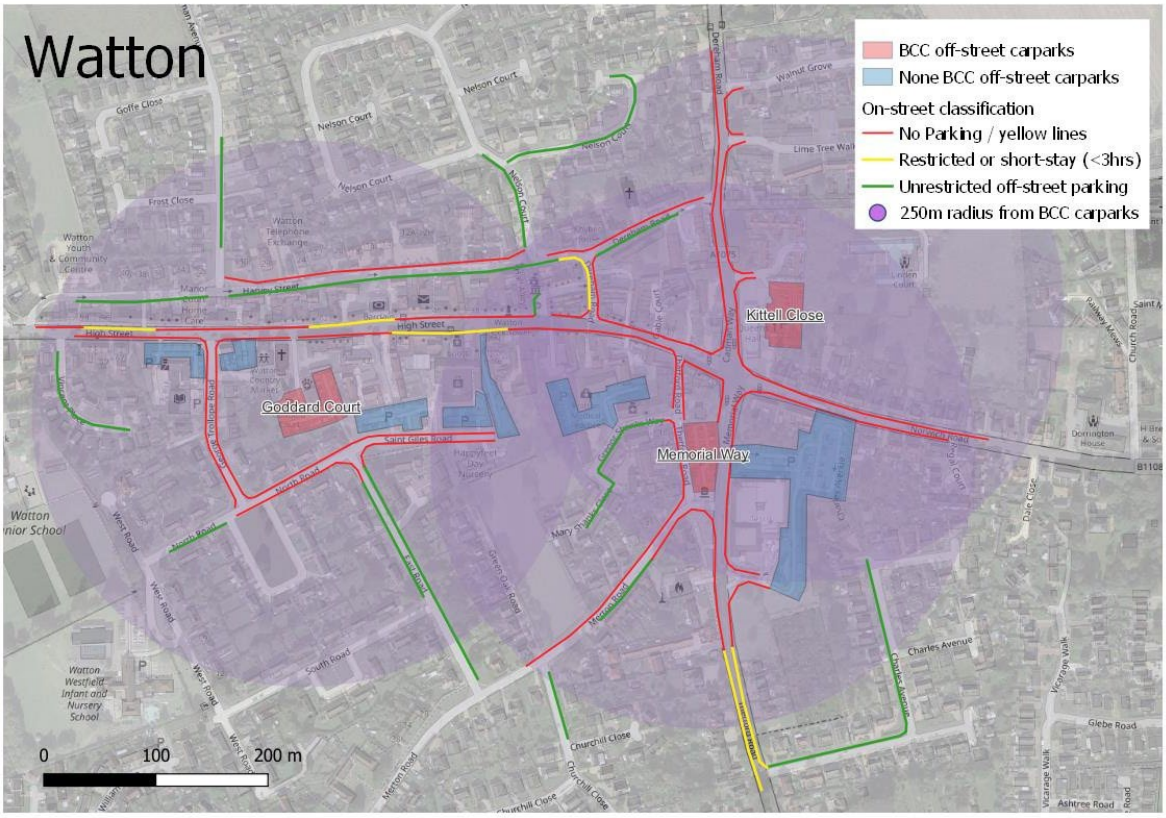
- School Ln: One terminal on the northernmost corner
- Tanner St: One terminal at the entrance of the south section onto Tanner St
- Cage Ln: Pay-by-phone or via the machine in School Ln
- Pike Lane: One terminal by the blue badge bays to the east

- The Link: One terminal at the entrance
- St Giles Ln: One terminal on the triangle along St Giles Ln with none on the western site
- White Hart St: One terminal one the central green area on the west of the site
- Riverside: One terminal on the eastern edge by Anchor Place.

21. Watton

Watton is a small market town formed as a linear settlement of 7,000 along a high street which includes a number of national chains and independent traders.

Figure 105. Watton – Availability of other parking



9.1 Displacement

As well the outlying Kittel Close which has capacity, there is a good supply of alternative free parking that would undermine any tariff implementation. This includes the Tesco on the eastern side of the town centre (which does not currently state a time restriction), the Budgens with 2hr free parking, and the uncharged parking of Watton Town Council adjacent to Goddard Court.

There is also on-street parking in the town within a reasonable walking distance to the High Street on wide estate roads such as Nelson Court to the north.

It is extremely difficult to estimate displacement with any degree of accuracy. Based on our observations and experience we would suggest that the availability of short-stay parking in other car parks combined with the long-stay availability off-street in the surrounding area could result in displacement as dramatic as below if tariffs were introduced.

Site	Year 1	Year 2	Year 3
Goddard Court	80%	70%	60%
Memorial Way	80%	70%	60%
Kittel Close	90%	80%	70%

Figure 106. Watton Tesco restrictions

9.2 Tariff Strategy

In considering the tariffs for Watton we have looked at other larger rural villages and smaller towns across the south of England including Soham, Yatton, Cuckfield, Harleston, Calne, and Biggleswade. It is uncommon for settlements of this size to charge for parking unless there is a specific issue such as tourism demand.

Despite the high occupancies of Goddard Court, we do not recommend bringing in tariffs at this stage. This is primarily because of the generous availability of alternatives for both on and off-street parking which undermines the business case for capital investment in equipment and ongoing revenue costs of enforcement.

Although Goddard Court has high volumes and churn, three quarters of this is for stay under an hour. Not only will these convenience stops be difficult to enforce, they also be sensitive to pricing and displacement. There are other car parks nearby offering free parking and on-street for short stays. Memorial Way is a borderline case, but charging here is likely to displace into Tesco, on-street and into Kittle Close. There is a very weak case to charge in Kittle Close given low demand and distance from the main retail and service attractors.

Additionally, the distance of Watton from other settlements will make enforcement expensive. There is also a weaker case in traffic management terms, i.e. to support the objectives for on and off-street parking to better manage traffic under the Traffic Management Acts.

9.3 Specific Recommendations

The situation in Watton should continue to be monitored to see if the case for the introduction of parking charges improves. Discussions with the town council will be needed to work towards a consistent charging policy - Goddards Court and St Giles Rd car parks should be under the same regime to balance demand across the two sites.

22. Specific Charging Options

Tariffs are the main tool in order to influence car park user behaviour. There are a range of options which operators can adopt to support and deliver their policies.

10.1 Sunday and Bank Holiday Charging

Since Sunday trading laws were introduced in 1994, activity in town centres on Sundays has increased significantly to an extent that there is little difference from other days of the week other than the 6 hour restriction. Town and city centre activity on bank holidays has also changed with most retailers now trading. As a result most private car park operators and many Councils now charge for the use of town and city centre car parks on Sundays and bank holidays.

The approach to charging during these periods differs by location with normal Monday to Saturday tariffs applying in some places, whereas a fixed rate charge per visit is the preferred approach in others. This might encourage longer dwell times for visitors when commuter parking pressures on parking capacity are much less of an issue than on other trading days. We recommend that a fixed all day rate is charged in Breckland to increase dwell times and for simplicity of enforcement.

10.2 Evening Charges

Although many council's car park charges are only between 8 a.m. and 5 p.m. Monday to Saturday, the vast majority of private car park operators charge for parking 24 hours a day. The approaches of councils across the country varies, from free evening parking, to extending normal charging hours to later in the evening, to imposing different charging structures after a fixed time. Whilst charging policy can be influenced by whether there is sufficient evening activity to justify the costs of managing payment compliance, in most cases in the absence of clear evidence that the implementation of evening parking charges influences visitor behaviour and footfall, the decision is political.

For example, Chichester District Council extended charging hours by 2 hours (from 6 p.m. to 8 p.m.) in two car parks in Chichester in April 2017. Since going live with the change there have been few complaints and there has been no negative impact highlighted by local businesses and cultural venues. Monitoring of neighbouring roads was also undertaken and there were no issues of concern or evidence of parking displacement. The majority of councils however still only charge between 08:00 and 18:00 for a number of reasons, including to support smaller evening economies, to reflect on-street parking restriction hours and to minimise enforcement costs.

10.3 Blue Badge Concessions

The Government's rights and responsibilities leaflet, issued with a blue badge, states that the purpose of the blue badge is to help a disabled person to park close to their destination, either as a passenger or driver. The leaflet also states that "...the badge is intended for on-street parking only."

Many disabled people and groups do not understand the rationale for making off-street disabled parking free, i.e., to make spaces available in convenient places. The argument that disabled people tend to be on a low income and therefore should benefit from free parking is criticised by a wide range of organisations and groups who argue that, using the same logic, other low-income groups should also be able to park for free.

Disabled Motoring UK's (the largest UK charity specialising in the mobility of disabled people) policy position is that Blue Badge holders should be able to park for up to three hours free of charge in off-street car parks. They argue that that the same free parking concession should apply in car parks as it does on-street e.g. three hours' free parking and when car parks charge it encourages more badge holders to park on the street which is more dangerous and could possibly cause traffic problems.

Some councils do however charge disabled users for example, Plymouth, Newcastle and Exeter. Others such as Cornwall, Rushmoor and the former Borough of Poole limit free parking to automatic Blue Badge holders with most need (automatic qualification is available if holders are receiving certain mobility benefits). Disabled Motoring UK feels this is confusing and unfair as it discriminates against people with equivalent needs who for some reason may not qualify for these benefits.

Examples of other councils' justifications for charging include tackling abuse and helping to fund services such as Shopmobility.

10.4 Motorcycles

Whilst the vast majority of councils do not charge for parking in designated motorcycle bays, some (e.g. Derbyshire Dales District Council) charge all motorcyclists whether parked in a normal parking bay or in a dedicated motorcycle bay, but other councils charge only where motorcycles are parked in a normal parking bay.

One issue with charging parked motorcycles is the ability to securely display a pay and display ticket on the motorcycle. Using payment by phone solves this issue, however if this is not an option, alternatives used elsewhere include:

- Writing the registration number on the ticket and noting the serial number (e.g. writing it down or taking a photo).
- Taking a photograph of the pay and display ticket on the motorcycle.
- Using or purchasing a permit holder like that formerly used for a tax disc and placing the ticket inside.

Breckland Car Park Strategy

Appendix 4 – Parking Technology options

Contents

23. Introduction

The main trend in parking technology is towards digitalisation – the ability of systems to record and share data whilst removing the need for manual processes. The resulting systems have a number of benefits to customers and operators:

Maintaining detailed records of all off-street parking locations, parking space information, restrictions and tariffs is held digitally, enabling accurate information on parking to be shared online with customers

Customers can interact with the parking service via websites and smartphone apps, reducing the time taken to apply for or renew permits and other permissions as well as reducing the administration burden for operators

The details of all parking sessions, permits etc are recorded centrally and linked to vehicles' licence plates. This will enable:

- an accurate picture of parking availability to be compiled and shared with customers
- a single source of information for enforcement purposes that can be used with a range of monitoring devices (handheld units, fixed and mobile ANPR). Enforcement can be mobilised more easily, covering a wider area with fewer resources.
- Data to be collected to inform parking strategy and to monitor the impact of tariff changes in the district.

11.1 Standardisation

Standards for the communication of parking data are currently provided by the Alliance for Parking Data Standards (APDS), which is also the basis of an ISO and CEN standard. In order for the compliance management systems to interact effectively with vehicles, apps and payment systems any technology must be able to communicate using these standards. Compliance with APDS standards and interfaces should therefore be an essential requirement in any procurement.

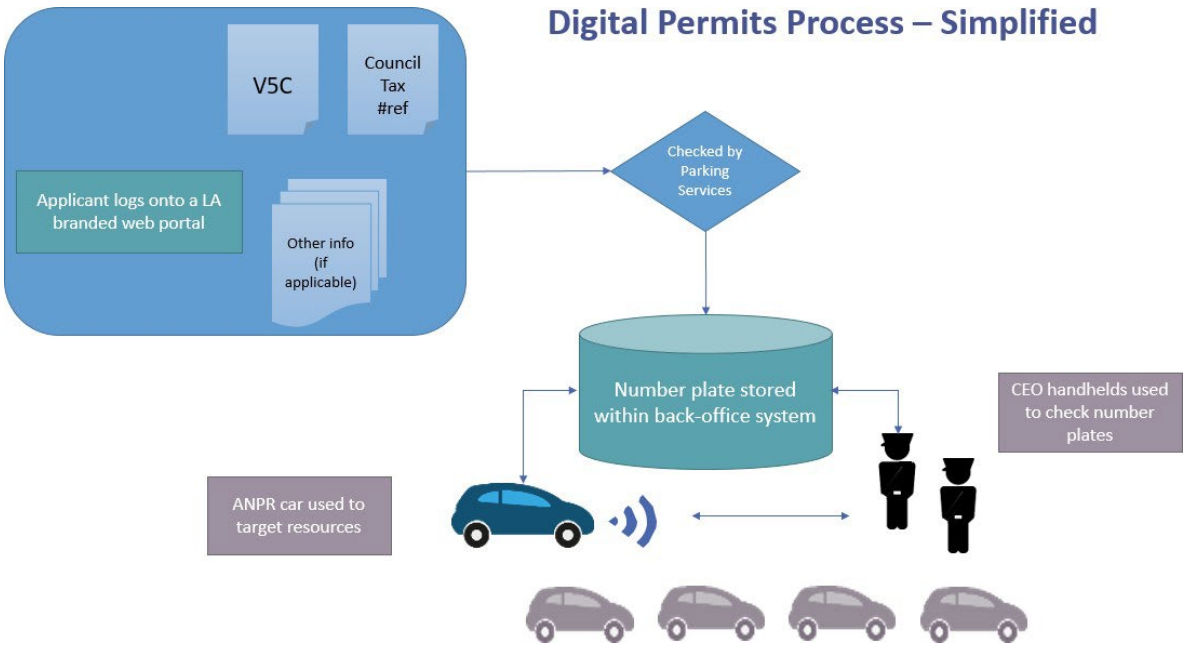
11.2 Digitalisation of Parking Services and Cashless Parking

Technological innovation, is changing the way people work, spend their leisure time, travel and shop. These forces will transform car ownership and car usage. 'Cashless' parking, through digitalisation, is part of the response to this change, especially as automated and shared mobility comes to the market.

The benefits of digitalisation of parking services are now well understood and customers now expect services to be easy to access online and through mobile and web enabled devices; rich data provides information for more agile and quicker response times and; digitisation allows for the more efficient and delivery of services, often with financial benefits for both customer and operator.

The advantages of digital permitting for parking include surprisingly large savings in specialist stationary, such as scratch cards, better deployment of CEO resources and better options for customers (for example extending parking without having to return to their vehicles).

At the most basic level, an example of digital permits operates as below:

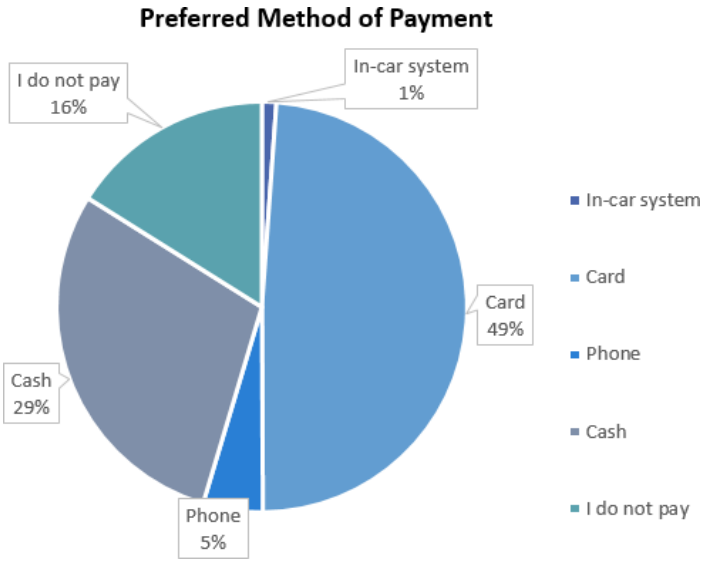


The case for digitisation of permits for Local Authorities (LAs) can be summarised within four broad categories:

1. Customer Expectation and Service	**2. Future Proofing**
• Customers expect to be able to manage products online themselves 24/7. Digitisation allows for online self-service, and quicker (even automated) response times.	• Increasingly choices are data driven. People use apps and online services to decide where and when they travel. If West Lindsey's parking is 'invisible' to third party systems, it risks being ignored.
3. Better data and information	**4. More efficient service**
• Managing Parking is about traffic management and the duties of LAs in the TMA 2004 and compliance rates give knowledge of problems and where they are letting you know how well you are performing. Digitisation effectively manages compliance monitoring automatically. • More and better focussed CEO patrols though richer data.	• At the practical level digitisation removes the need for printing, posting, filing, laminating etc. reducing costs and freeing up staff time to focus on customers. • Digitisation brings flexibility, for example easily enabling LAs to respond to customer needs or make changes quickly to the regime (e.g., allowing concessions).

The way that the public expects to pay for parking is also changing. In most instances parking is a relatively small spend and, prior to the Covid-19 outbreak, cash remained the most common method of payment. However, the use of contactless payment in society has been growing quickly, spurred on by banks looking to optimise operational efficiencies and growing customer confidence in and familiarity with this technology. This, and the increasing popularity of apps such as Apple Pay, Android Pay, PayPal, etc. mean that drivers increasingly expect cashless solutions to pay for their parking. Covid-19 social distancing rules sped up this trend due to the perceived risk of spreading the virus through the use of cash. For the operator cashless payment enhances operational efficiency, provides valuable data opportunities, and removes the potential for theft.

Figure 107 – Survey carried out by PML in the North West Midlands (2020 r=770)



Creating convenient alternatives to cash is an essential pre-requisite for any parking operator that aims to reduce or remove cash payment. For the customer, the need to carry change for cash payments can be increasingly inconvenient. Where coins are accepted car park operators need to securely collect and process the income at a cost to the operation. There is also the risk of break-ins to payment machines with a potential loss of income. Reducing the number of coins collected will decrease the cost of processing this income and reduce the potential for theft. However, while reducing the number of parking payment machines could lead to revenue savings on maintenance, saving on the collection and processing costs will only be achieved if the actual proportion of coins coming through the system is reduced or eliminated.

Despite new payment choices previous research in 2019 (the British Parking Association (BPA)) showed that many customers remain keen to use cash, however in an update carried out in 2021 showed that given the choice most people would prefer to pay by card. At a national level, the most common parking payment method is still using cash to pay and display, a legacy of the number of cash-only payment terminals in place coupled with the relatively low transaction costs involved. However, it is clear that contactless cards are changing the way customers pay for other products and services and it may be time to use this, supported by payment apps, as a way of removing cash from parking. Customers expect to be able to pay for services as seamlessly as possible, using new technologies where appropriate, and want a quick and effortless service.

11.3 The Case for Cashless Only Parking

More Council have or are considering moving to cashless payments. This has in some cases been driven by the 3G phone network being switched off resulting in a large number of older pay and display terminals becoming obsolete. Examples given by councils to support this decision include: -

- Eliminating cash collection costs including staff time spent reconciling payments.
- Maintenance of machines accepting cash is higher than for card/contactless payment machines due to paper and coin jams causing greater wear and tear and moving part failure.
- Cash transactions are reducing every year, where cashless payments are available (e.g. the proportion of cash transactions collect by York City Council has reduced from 25% in 2020/21 to 12% in 2022/23.
- Cashless payment is more convenient as it does not require loose change or the customer to overpay due to not having the correct change.
- The reduced need for cash collection will result in a reduction of vehicle movements that would normally undertake this duty.

Any decision to proceed with cashless only payment requires an Equality Impact Assessment ideally following a consultation exercise to ensure that all potential issues have been captured. Common issues raised in other Council's assessments include: -

Issue	Mitigation
Access to a bank account	Scope to introduce pay-points for parking in local businesses. This could have a positive impact by attracting additional footfall and spend in these businesses.
Will impact older residents more	It is recognised that older people will be less likely to have a mobile phone or ability to set up an online account. It should be remembered that payments can be made via text or phone call. A smartphone is not essential. Parking machines will still be available for card payments and most car owners pay insurance through bank accounts. For those with difficulty in walking or consider the pay machines difficult to access, phone payments can be made easier and safer from the comfort and convenience of a vehicle.
Impact of disabled users	Where Blue Badge holders park for free there will be limited impact on holders.

11.4 Implications of Payment Transaction Costs

Payment by phone/app is a convenient and popular way to pay for parking but payment providers charge a convenience fee to cover their administration costs. These costs include items such as setting up and maintaining the app, customer support, and fraud prevention. The level of convenience fee can vary however 10p per transaction is common. The majority of councils pass this cost onto service users. For example, Colchester Council this year started to pass on these costs due

to financial pressures and rising costs, but the convenience fee does not apply to all parking payments - only to payments made via the phone app.

Card processing fees will also impact the net level of revenue received. Processing fees vary from provider to provider, and some have fixed rates which can make a significant dent on smaller transactions such as parking tariffs and should therefore be avoided if possible. Generally processing fees can represent c3% of transaction values.

When considered together, VAT, the convenience fee of 10p per payment by phone transaction, and card transaction fees can represent a significant proportion of the tariff.

24. Technology Options for Breckland's Off-Street Car Parks

At present on some car parks the Council uses ticket issuing pay and display parking terminals to evidence free parking events in order to enforce length of stay restrictions. The Council uses the Norfolk Parking Partnership to carry out compliance management on its parking estate to ensure that users comply with the Council's parking orders including, length of stay and parking in appropriately designated spaces only. Compliance management contracts normally require the supplier to employ Civil Enforcement Officers (CEOs) and deploy them to patrol the car parks for a fixed number of hours per month and issue Penalty Charge Notices (PCNs) to anyone parking and not complying with parking orders. These PCNs must be issued by hand and placed on the vehicle.

The existing pay and display terminals used by the Council in the district require the customer to collect a ticket at the machine and then return to the vehicle to display the dispensed parking ticket. When used for payments traditional pay and display machines require payment on arrival and users are required to predict their length of stay. Many businesses express the concern that the inflexibility of this system impacts visitor dwell times. To counter this many councils have adopted payment by app/phone This requires a contract with a payment by phone provider and car park users to register with the provider and pay of a small convenience fee in addition to the tariff due. There is usually an option to receive reminder texts (alerting the customer when the parking session is about to expire) at an additional cost per text. The customer is also able to extend the parking period (subject to any length of stay restrictions) via the pay by phone provider's app.

Other disadvantages of pay and display include: -

- As customers using the parking terminals need to return to their vehicle to display the ticket, parking terminals will ideally need to be distributed evenly around the car park to minimise walking times, increasing the costs of services to and the installation of the machines and associated signage.
- The machines are limited in the type and amount of data that they can supply as they cannot identify the vehicles parked and the exact duration of actual stay compared with that paid for in advance.
- CEOs are required to inspect every windscreen for a ticket or a permit, whilst also carrying a handheld machine to check whether payments have been made via a payment by phone app. This can be a time consuming and inefficient method of compliance management. As a result compliance levels can suffer too.

There are alternative systems commonly used for managing payment and car park access/egress which could be implemented at the Council's car parks including: -

12.1 Pay on foot with barriers.

With this option, drivers approaching the car park entrance are slowed by a barrier that raises almost instantaneously. ANPR is used to identify vehicles (no requirement for tickets) and customers pay for time used when leaving. Machines accept payment by cash (with change) or card (contactless). Customers can also pay using an app or account (no need to use the on-site machines). The exit is controlled by a barrier.

This system:

- Provides a system with minimal delay at entry. ANPR does not require an entry barrier, but one is generally installed to simply prevent entry when the car park is full.
- Eliminates the potential mechanical failures of systems that issue tickets.
- Enables integration with other digitised systems within the Council (including permit systems) and provide data for traffic systems on vehicle flow and occupancy levels.
- Ensure compliance as customers must either have a pass or have paid to exit the car park.
- Is more expensive to install and maintain then other options,

Installing barrier systems in car parks is a very effective way of ensuring compliance but it can result in customers being unable to leave due to payment or equipment issues. A remote monitoring service must be employed to provide an immediate response to all calls made from the intercoms at entries, exits and payment stations. A control room can resolve the majority of issues remotely but in a very small number of cases control room staff will need to call on a person to assist at the car park. This can be an issue for many Councils whose parking teams are not adequately resourced to deal with issues quickly. This can lead to a very poor parking experience if leading to blockages at exit, and in some cases has led to the vandalism of the exit barriers to allow exit.

CEOs will still need to patrol and issue PCNs (note that PCNs will still be relevant for those who park inappropriately, e.g. in disabled bays without a Blue Badge or in designated residential bays). Also on site resources may have to be provided to manage the exit of Blue Badge holders if they park for free.

Case Study – Cheshire West and Chester Council

Cheshire West and Chester Council (CWCC) operates both on and off-street parking within its boundary. It had historically operated its off-street car park using pay and display with the exception of one car park in Chester which had pay and display on some floors and pay on exit on the remainder. Due to issues with the pay on exit system, CWCC considered options for its replacement and the potential to extend the system to other car parks in Chester. This was for a number of reasons including: -

- Improving compliance rates at off street car parks – enforcement resources had been prioritised to on-street to ensure statutory obligations were complied with
- To improve payment options. Existing machines accepted only coins and no change was given.
- To provide functionality for the introduction of concession arrangements with local businesses

A WPS Pay on Foot and ANPR (licence plate recognition) system was subsequently installed at 7 of its car parks in Chester and new pay and display machines at other which now allow contactless payment and provide change for cash payment. Functionality includes: -

- Recognition of season ticket/pre-payment card holders with barriers raising automatically
- CWCC resident Blue Badge Holders park free for up to 4 hours using a chip system applied to the badge which the pay on foot system recognises.
- A system to manage free parking for specific users such as visitors to surgeries. A custom-built Ticket Entry Terminal in each entry lane enabling visitors to choose between concession parking and public parking. If a concession ticket is chosen the system automatically analyses the parking status and provides visitors with a 'concession parking available' ticket (to be validated within the concession before exit) or informs them that concessions have reached the available limits and requires them to take a 'standard' public ticket.
- A web-based application that allows business to pay towards or for its customers' parking.
- An intercom system linked to the Council's car park management office during operational hours. Outside these periods, issues are managed by the CWCC's main CCTV control room.
- A flexible WPS maintenance contract, supported by front line maintenance from CCWW officers if required.

12.2 Payment Terminals with Check in – Check out.

For car parks that are unsuitable for PoF or if the installation costs are prohibitive, an alternative is to install machines similar to pay and display, but with more sophisticated payment terminals. Customers enter their licence plate on a payment terminal (similar to a P&D machine) on arrival. Customers have option to either:

- Pay on arrival using contactless card.
- Pay on departure ("check-in/check-out") using contactless card.

Customers can continue to pay using an app or account (there is no need to use the on-site machines) in either pay on arrival or departure mode.

The proposed payment terminals:

- **Require customers to enter their licence plate number**. They do not issue a ticket. This removes the need for customers to return to their vehicles to place a ticket in the windscreen. It enables using ANPR vehicles to identify potential non-compliance. CEOs with specially equipped handheld devices will be directed to these vehicles for follow up. This makes the process of identifying vehicles that may be in contravention more efficient. It also tends to increase compliance.
- **Allow customers to 'check in and check out'.** This can be installed as an 'add-on' function to payment terminals that accept card payment. Customers can use their credit/debit card to identify themselves on arrival, then return to the machine before departure. Using the same card enables the machine to calculate the fee, process payment and "check out" the vehicle. This removes the need for customers to estimate their stay length on arrival. A similar process can be used with pay by app. This approach has been successfully piloted by several Councils across the UK including Newcastle, Lichfield and Basingstoke.
- **Can download information on specific vehicles in real time.** A central permit system can therefore be used, for example providing reduced parking charges to local people who have enrolled in a scheme managed by the same system that manages residents' permits. Other databases may also be accessed to enable other services such as emissions-based charging.
- **Rationalise the parking machines required**. If machines no longer issue tickets or are used as check in-check out devices, then fewer machines may be required. Car park machines should also be re-positioned to make them convenient for customers entering or leaving the car park on foot.

12.3 Frictionless ANPR Payment Systems

Despite the current restrictions on the use of ANPR cameras by Councils, barrierless ANPR systems linked to payment terminals can be used in a limited way to provide frictionless parking payments.

These frictionless ANPR systems work in a similar way to the Payment Terminals with Check in – Check out capability, however in addition they allow local residents to pre-register their vehicles via the system provider which then allows them to automatically pay for their parking visits via a registered payment card. ANPR cameras monitor when the vehicle enters and exits the car park, calculates the tariff payment due and charges the user's registered payment card. Car visitors who aren't registered can pay at the parking terminals or via the pay by app/phone system as normal.

The benefits of this system are: -

- The registration number data together with accurate records of entry and exit times provides excellent compliance data to check and improve the efficiency of the compliance management service.
- An improved customer experience for registered users by allowing for frictionless payment.
- Accurate occupancy and length of stay data.
- Easy integration with businesses for parking tariff validation/concession options

The downsides are that there are no benefits for non-registered users and CEOs are still required to enforce payments for these vehicles. The transaction fees charged by the system providers are also relatively expensive (upwards of 5% of the value of each transaction).

12.4 The National Parking Platform

The Department for Transport is currently funding a 'National Parking Platform" (NPP) project to deliver open format parking data from car parks and on-street, via a parking platform, to consumers using third party apps. It will also enable multi-vendor payment (i.e. the customer will be able to make payment for parking using a digital supplier of their choosing) and provide information on who has and has not paid for parking to enable enforcement decisions to be made.

Data availability along with implementation of technology will enable a fully digitised smarter parking service. This will bring a range of benefits to the operator and consumers, these include:

- Multi-vendor payments where third party apps that are capable of identifying and paying for parking in a frictionless way compete to provide the best customer experience.
- Effective intelligence led compliance monitoring, delivering increased compliance.
- Online real-time parking availability information and the ability to reserve off-street spaces.
- Data to support policy analysis, planning and decision-making.
- Combining real-time parking data with traffic information to power next generation routing.
- Online customer accounts.
- Where parking should be and how much.
- Informing future pricing policy including dynamic charging and differential tariffs for greener vehicles, focussed concession schemes, etc.
- Number and location of EV charge points.
- Reduced operating costs. Traditionally, Civil Enforcement Officers (CEOs) were deployed according to a number of factors including experience and community demand. However, with better data deployment can be made more efficient and effective. The data can be analysed using algorithms that will be able to recommend deployment patterns based on demand and compliance levels. These algorithms will be able to learn from the data collected to improve their predictive ability (note that systems will need to ensure that privacy requirements are fulfilled).

25. Summary of Options

The respective customer journey for each type of system is summarised in Figure 2 and the functionality of each compared in Figure 3 (1 tick adequate, 2 ticks good, 3 ticks excellent). Finally the capital and revenue costs of each system are compared in Figure 4.

The BPA research from 2021 referred to earlier in this appendix, asked people opinion on parking technology. The highest positive scores we record for: -

- Barriers where payment required tickets or tokens – 45%
- Barrier free ANPR camera systems – 44%
- Parking payment terminals which require the full number plate to be entered – 40%
- Paying by phone or text -28%.

Figure 108

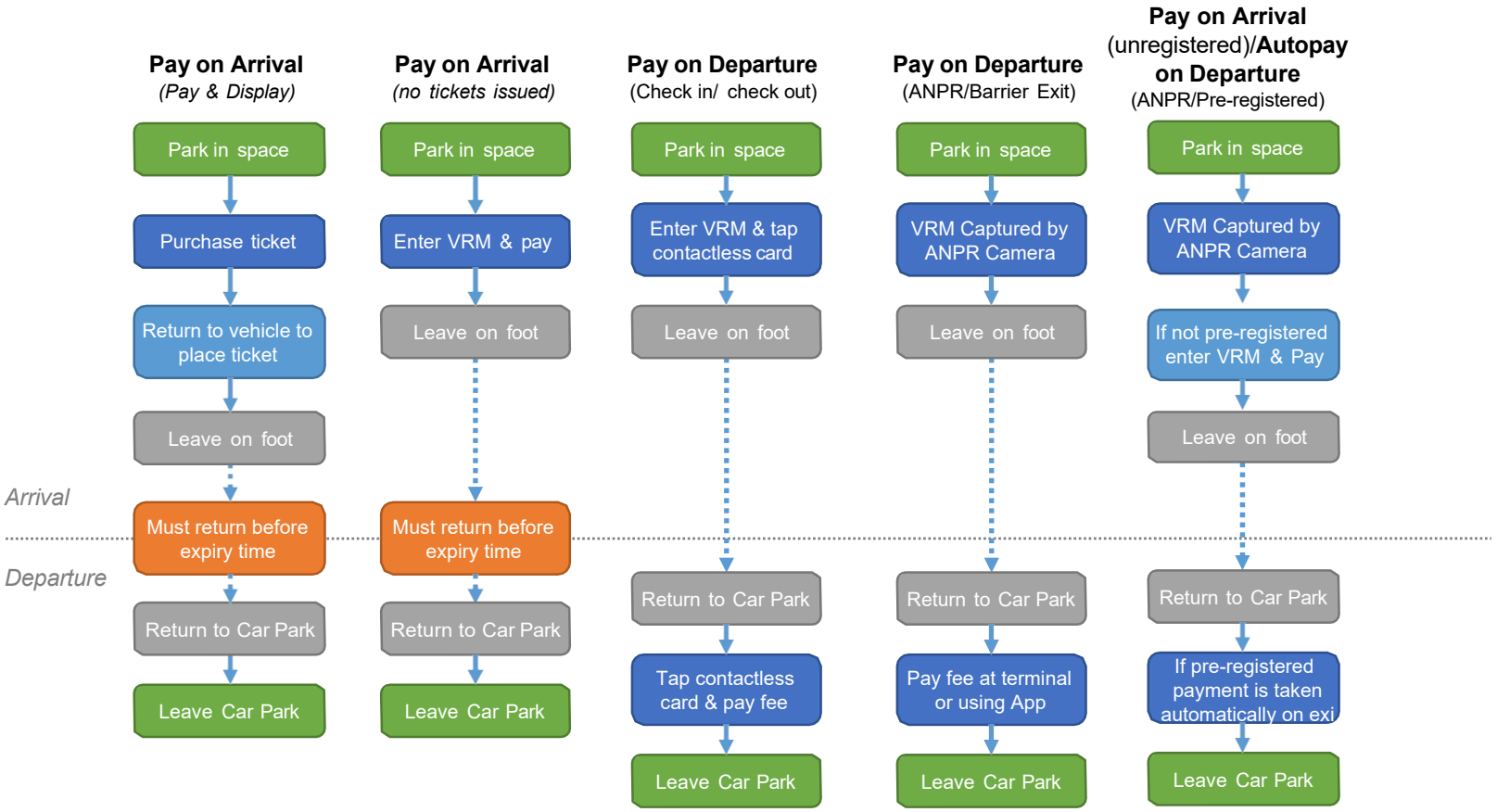

Pay on Arrival
(Pay & Display)
Park in space
Purchase ticket
Return to vehicle to place ticket
Leave on foot
Must return before expiry time
Return to Car Park
Leave Car Park
Pay on Arrival
(no tickets issued)
Park in space
Enter VRM & pay
Leave on foot
Must return before expiry time
Return to Car Park
Leave Car Park
Pay on Departure
(Check in/ check out)
Park in space
Enter VRM & tap contactless card
Leave on foot
Return to Car Park
Tap contactless card & pay fee
Leave Car Park
Pay on Departure
(ANPR/Barrier Exit)
Park in space
VRM Captured by ANPR Camera
Leave on foot
Return to Car Park
Pay fee at terminal or using App
Leave Car Park
Pay on Arrival
(unregistered)/Autopay on Departure
(ANPR/Pre-registered)
Park in space
VRM Captured by ANPR Camera
If not pre-registered enter VRM & Pay
Leave on foot
Return to Car Park
If pre-registered payment is taken automatically on exi
Leave Car Park
Arrival
Departure

Figure 109 – Comparison of Functionality

	Pay on Arrival (Pay & Display)	Pay on Arrival by Licence Plate (no tickets issued)	Pay on Exit (ticketless) (Check in/Check Out)	Pay on Exit (ANPR/Barrier Exit)	Pay on Arrival/ Autopay on Exit
Customer Experience	✓	✓	✓✓	✓✓✓	✓✓✓
Data	✓	✓✓	✓✓	✓✓✓	✓✓✓
Payment Compliance	✓	✓✓	✓✓	✓✓✓	✓✓
Business Connection Capability	X	✓✓	✓✓	✓✓✓	✓✓✓
Live Data Potential	X	✓	✓	✓✓✓	✓✓
Capital Cost	✓✓✓	✓✓✓	✓✓✓	✓	✓✓
Maintenance Costs	✓✓	✓✓✓	✓✓✓	✓	✓✓

Figure 110 – Capital and Revenue Cost Implications

Option	Capital Cost	Additional Revenue Cost
Pay by Licence Plate	£5k per machine but potential for upgrade on newer terminals	less than £5 per month for Sim card for each machine
Pay on exit/Check in check out	£5k per payment terminal	Sim card for each machine, additional card processing costs for pre-authorisations
Pay on Exit/Barriered ANPR	£9k each entry exit £15k per payment terminal £10k back office 10%-25% Installation	Maintenance 10% of capital costs c£20k per annum for remote monitoring
Frictionless ANPR Payment	£5k per camera or nil if installed by service provider	c10% of capital cost or nil if installed by service provider subject to c5% commission on payments made through system

Breckland Car Park Strategy

Appendix 5 – Site Review Summary and Recommendations

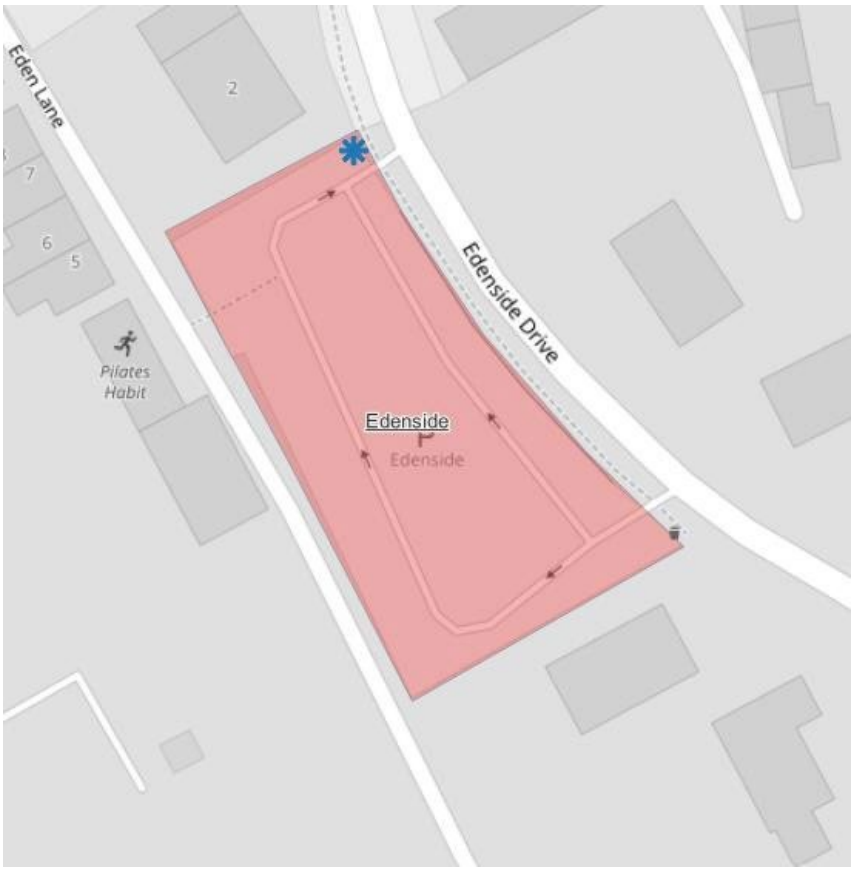
26. Site Sheets

This Appendix outlines specific recommendations for sites. Discussions with an equipment manufacturer during and after procurement will be needed to confirm and refine these to locate services, consider in detail the feasibility of Photo-voltaic power

Sites have been traced using OpenStreetMap as it is not permitted to reproduce publicly available satellite imagery (e.g. Bing, Google) in reports. This means that sites may not be plotted 100% accurately.

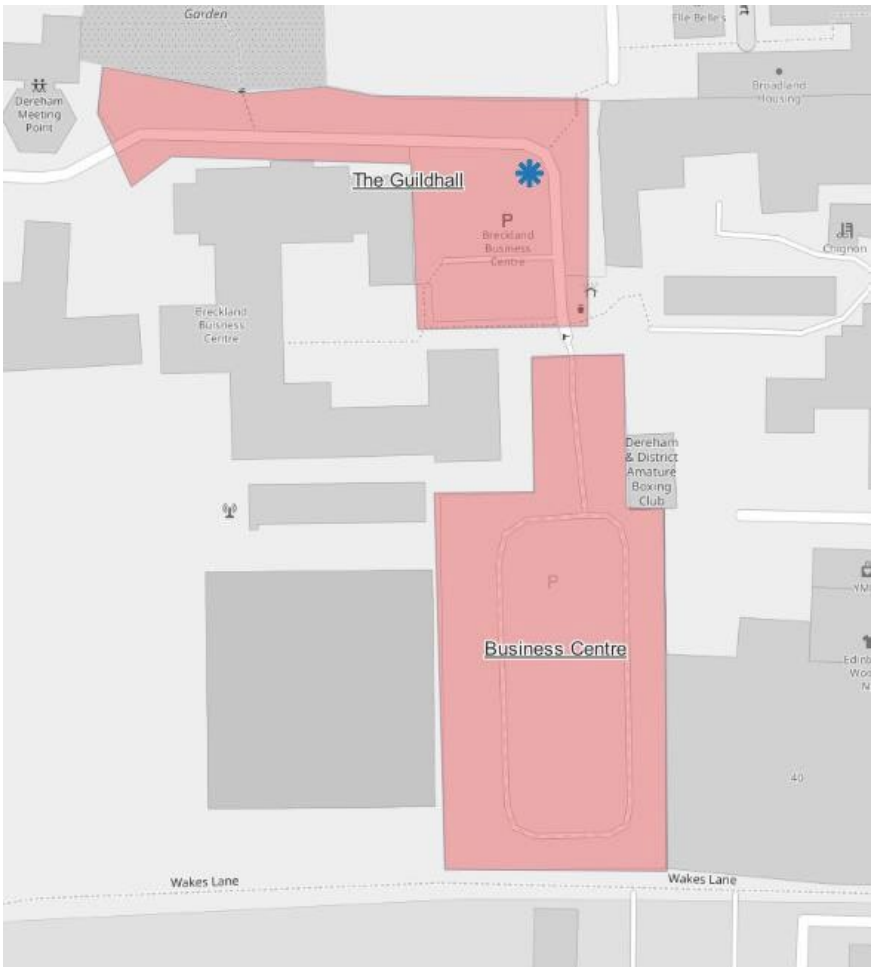
All maps produced in this report use OpenStreetMap. © OpenStreetMap contributors 2023.

Town	**Attleborough**
Site Name	Queens Square
General Condition	Very good. Clear bay marking.
Lighting	Dedicated – good
Signage	Good. Wayfinding sign from Church Rd to car park needed.
Bay size / circulation	Very good. Standard.
Payment Terminals	One. At current locations
Map	
Recommendations	In very good condition. Replace machine in like-for-like position. PV power is likely to be feasible. Tariff board by recycling.

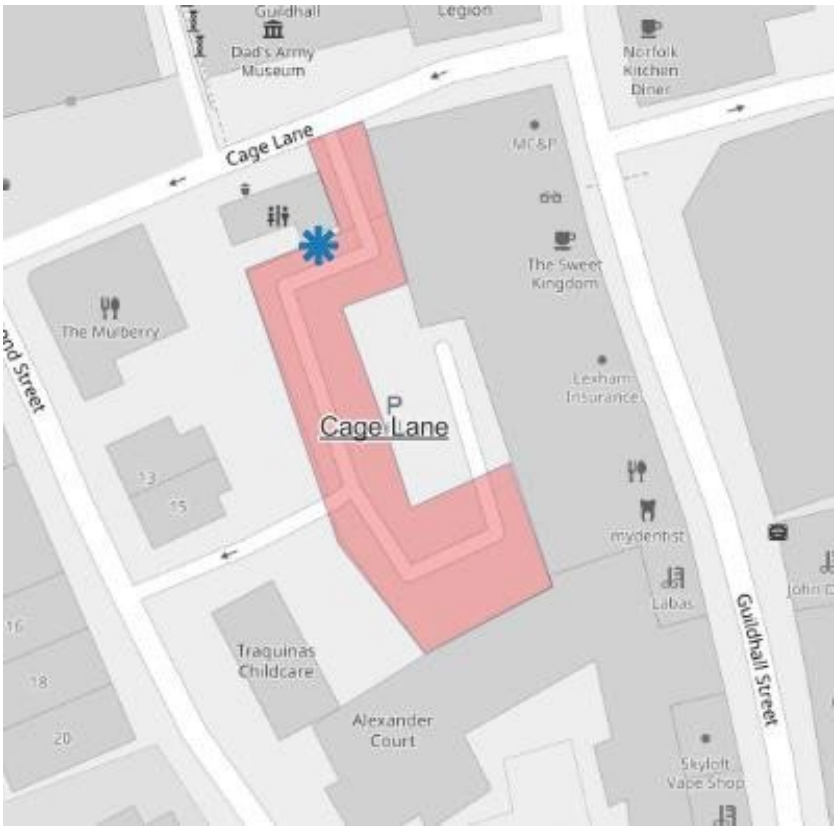
Town	**Attleborough**
Site Name	Edenside
General Condition	Good. Clear bay marking. Out of bay parking on southern, eastern and northern edge. Formalise if possible
Lighting	Dedicated – good
Signage	Adequate for current needs.
Bay size / circulation	Good. Standard size.
Payment Terminals	One. At north east corner
Map	
Recommendations	In good condition. PV power likely to be feasible. Tariff board by recycling machine.

Town	**Dereham**
Site Name	Cherry Tree
General Condition	Good. Clear bay and direction arrows worn in places.
Lighting	Borrowed from surroundings – poor in most of the car park. - CCTV
Signage	Poor – damaged.
Bay size / circulation	Good. Standard size.
Payment Terminals	Two. First by southern exit. Second at sign by main vehicle entry.
Map	
Recommendations	In good overall condition. PV power is likely to be feasible. Decision required on whether to introduce lighting.

Town	**Dereham**
Site Name	Cowper Rd West/East
General Condition	Fair condition. Markings should be refreshed.
Lighting	Dedicated on site lighting – good.
Signage	None at present.
Bay size / circulation	Good. Standard size.
Payment Terminals	Two across the two sites on key pedestrian routes and exists as below.
Map	
Recommendations	In reasonable overall condition. PV power is likely to be feasible. Highways engineer may be able to increase capacity for 3-4 in the north west corner of Eastern portion.

Town	**Dereham**
Site Name	The Guildhall
General Condition	Good condition.
Lighting	Dedicated on site lighting – good.
Signage	Adequate at present
Bay size / circulation	Standard size with good ped routes.
Payment Terminals	One on the grass verge area in the centre of the site.
Map	
Recommendations	In reasonable overall condition. PV power may suffer from tree shade in the winter months. Will require input from manufacturer.

Town	**Thetford**
Site Name	Bridge Street
General Condition	Very good condition.
Lighting	Dedicated on site lighting – good.
Signage	Good
Bay size / circulation	Standard size with good ped routes.
Payment Terminals	One by ped exit to the north. Second by Hotel.
Map	
Recommendations	In reasonable overall condition. PV power may suffer from tree shade in the winter months. Will require input from manufacturer. Any charging regime will need to consider any arrangements with the Hotel. Hotel guests can record their plates in reception or online through many pay by phone operations.

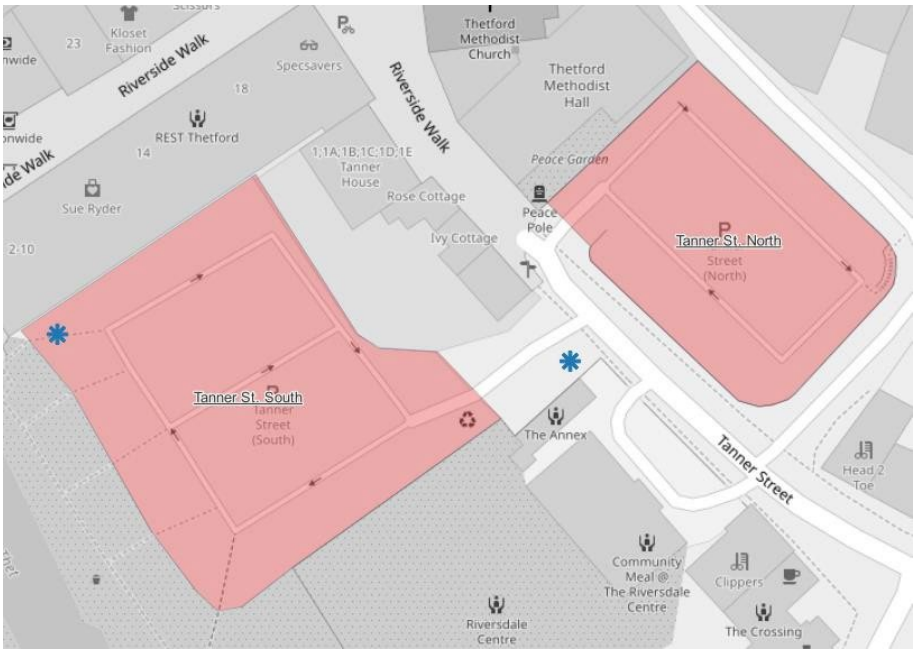
Town	**Thetford**
Site Name	Cage Lane
General Condition	Fair condition
Lighting	Limited – one post dedicated, but additional borrowed light from surroundings.
Signage	Fair
Bay size / circulation	Standard size clear markings and good surfacing.
Payment Terminals	One against rear wall of public convenience.
Map	
Recommendations	In reasonable overall condition. Very restricted site, with shared access to parking of adjoining premises. Few physical improvements possible.

Town	**Thetford**
Site Name	The Link
General Condition	Good condition
Lighting	Dedicated lighting. Good.
Signage	Good.
Bay size / circulation	Good bay size and clear markings
Payment Terminals	One at main entrance.
Map	
Recommendations	Extending the car park would require planning and ecological feasibility but appears technically straightforward.

Town	**Thetford**
Site Name	St Giles Lane Upper
General Condition	Both site in fair condition and constrained by surrounding uses.
Lighting	Fair with some dedicated and additional borrowed light from surroundings.
Signage	Poor – will need improvement
Bay size / circulation	Standard size, circulation is limited by layout.
Payment Terminals	One on SE corned of Upper site and second on SW corner of Lower site.
Map	
Recommendations	In reasonable overall condition. Restricted sites, with access to adjoining properties and routes.

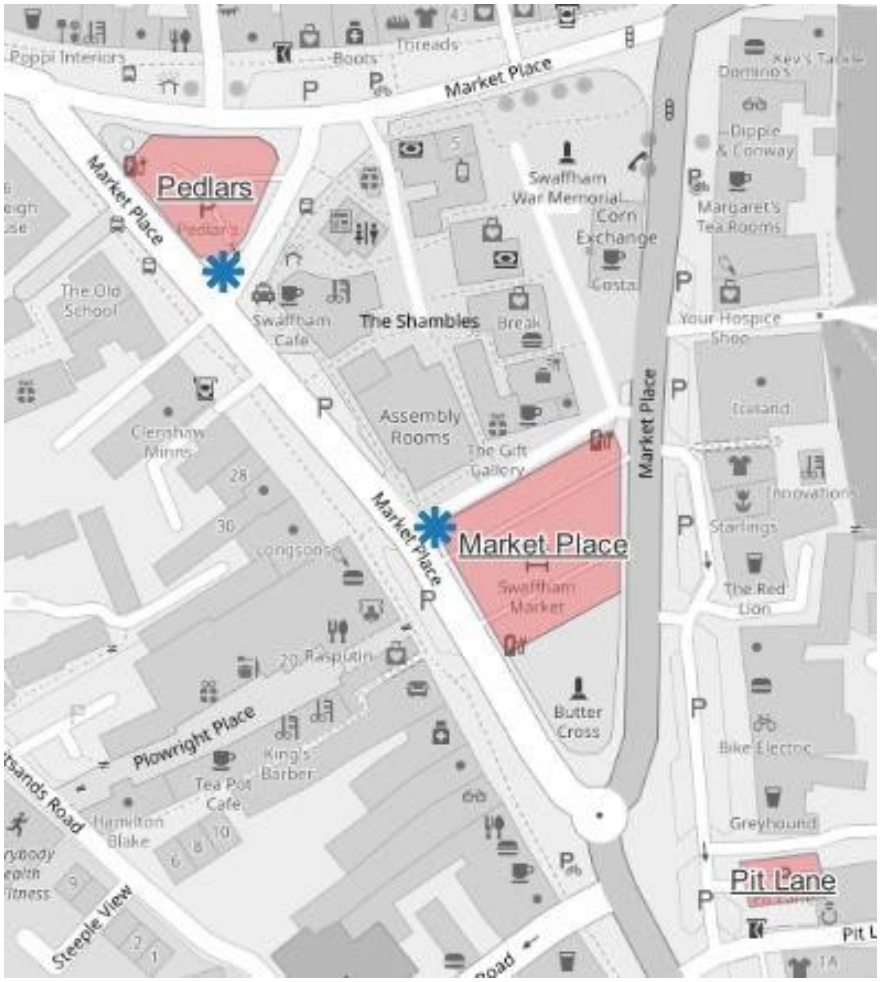
Town	**Thetford**
Site Name	Pike Lanes
General Condition	Fair condition
Lighting	Dedicated, good, with additional borrowed light from surroundings.
Signage	Fair
Bay size / circulation	Standard size clear markings and fair surfacing.
Payment Terminals	One at western edge (will require removal of some hedge), second if required at north east corner.
Map	
Recommendations	In reasonable overall condition. Disused, or at least apparently un-enforced Taxi Rank. Convert to standard parking.

Town	**Thetford**
Site Name	School Lane
General Condition	Good condition
Lighting	Reasonable dedicated, good, with additional borrowed light from surroundings.
Signage	Good
Bay size / circulation	Good bay size and clear markings
Payment Terminals	Two terminals. One terminal at northern corner with a second at the southern to cover both sites if ticketless parking is employed.
Map	
Recommendations	Proposals for disposal of these sites should be considered once new regime has bedded in and based on data. On-street parking surrounding the site is likely to require new parking restrictions.

Town	**Thetford**
Site Name	Tanner Street North / South
General Condition	Good condition
Lighting	Dedicated lighting. Good.
Signage	Good.
Bay size / circulation	Good bay size and clear markings
Payment Terminals	One by current recycling bins (will require relocation of one bin). Second by eastern exit to Riverside Walk with ticketless parking employed.
Map	
Recommendations	None.

Town	**Thetford**
Site Name	White Hart Street
General Condition	Good condition
Lighting	Dedicated lighting. Good.
Signage	Good.
Bay size / circulation	Good bay size and clear markings
Payment Terminals	One centrally located by pedestrian exit.
Map	
Recommendations	Extending the car park would require planning feasibility.

Town	**Swaffham**
Site Name	Theatre Street
General Condition	Very good condition
Lighting	Dedicated lighting. Good.
Signage	Good.
Bay size / circulation	Good bay size and clear markings
Payment Terminals	One located by main entrance, dependent on ticketless parking.
Map	
Recommendations	Good site overall. Consider improved pedestrian links to London St as a long term project.

Town	**Swaffham**
Site Name	Pedlars and Market Place
General Condition	Very good condition
Lighting	Dedicated lighting. Good.
Signage	Good.
Bay size / circulation	Good bay size and clear markings
Payment Terminals	The Pedlars site is very small, which makes it difficult to justify a dedicated payment. However, the 80m distance from Market Place may make this unavoidable. Subject to views of stakeholders, we would recommend one terminal between Market Place and Pedlars conditional upon pay by phone and ticketless parking being in place. A location in Pedlars is shown below for illustration.
Map	
Recommendations	See main report for recommendations on Pit Lane.

Breckland Car Park Strategy

Appendix 6 – Service Delivery Options

Contents

27. Service Delivery Options

As well as our many years of working with local authorities, private parking operators, and parking enforcement suppliers, we have recently carried out primary research on delivery models to advise multiple clients in southern England. During this work we spoke to a number of local authorities in southern and southwestern England including urban unitary authorities and larger rural counties.

When considering the high-level options for service delivery there are broadly four models for service delivery currently deployed across the country:

- In-house: day-to-today delivery is entirely or largely delivered within the local authority by directly employed staff;
- Contracted: day-to-day delivery is entirely or largely delivered by a contractor appointed by a local authority;
- Separate lots: whereby large portions of the service are contracted separately;
- Joint Venture: whereby a third party, for example a neighbouring council or, for example, a JV company is employed to carry out parking management and enforcement.

Across England most authorities either deliver services in-house or through a contract with a supplier. In the research we conducted, we found that most authorities made the decision on their delivery models at the point they adopted civil enforcement. There have been relatively few cases of wholesale change in delivery model, although there are a few recent examples which will be discussed in following sections.

12.5 In-house delivery

We estimate around half of authorities deliver their parking services in-house including some of the country's largest cities (e.g. Newcastle and Bristol), counties (e.g. Devon), unitary authorities (e.g. Bath and NE Somerset and Swindon), and numerous smaller districts smaller, often off-street only.

This does not mean that all services are delivered in-house, but that the majority of the team, including the Civil Enforcement Officers are employed directly by the council.

Commonly cited strengths of this model are the direct and easy access to the civil enforcement service, the ability to direct and change the service to respond to policy changes and the shared services with other departments. However, poorly managed or resourced parking services can perform very badly with low PCN rates and high rates of PCN appeals. Where teams are poorly managed, authorities seem especially susceptible to high rates of sickness and absence.

Figure 111. In House SWOT Table

Strengths	Weaknesses
• Easy access and influence • Complete control over quality of delivery • Intimate understanding of the local area and the authority • Ability to reach back into other council services • Intangible customer service benefits e.g. enforcement staff working for their own communities ('civic pride')	• Ongoing need for training and continued professional development often overlooked • Fewer economies of scale when purchasing equipment • Difficult to scale up or down • Corporate policies / priorities can reduce the efficiency and professionalism of the service • Slower to procure services and equipment • Slower to recruit and replace staff.
Opportunities	**Threats**
• Some shared services or shared economies (e.g. CCTV, Cash Collection, Moving Traffic Offences) • Better quality of delivery and customer service leading to reputational benefits • Branding and communications.	• Corporate policies such as recruitment freezes or carte blanche cost-cutting • Senior salaries often lower than market rate • Junior staff pay & benefits often lead to higher costs • High sickness and vacancy rates • Inappropriate corporate projects (e.g. with software or corporate systems).

Recently, some authorities have decided to bring their parking services back in-house, two examples are briefly discussed below.

Hackney made the decision to in-house its civil enforcement activities in November 2020. The objective was to improve the customer experience and improve the flexibility of the council to embrace new ways of working to improve the service. This included approximately 132 FTE staff covered under TUPE regulations with a transition period from Nov 2020 to March 2022. Fixed costs are expected to remain the same, with the main savings coming from the payments relating to Key Performance Indicators (KPIs).

Buckinghamshire brought all civil enforcement in house following a new Unitary Council Buckinghamshire Council formed in April 2020. Prior to this, there were four district councils and one county council. The legacy county council operated an outsourced model for on-street parking restrictions, whereas the legacy district councils responsible for off-street operated in-house teams. The parking service in its entirety has operated in-house since autumn 2021 when the contract for the outsourced model expired. The council cited flexibility, simplicity and control over the service as the reasons for the change.

12.6 Contracted

Letting a contract for specialist services can be beneficial to parking services and provide managed, efficient, resilient and cost-effective solutions if the contract is well specified, the performance targets are achievable and fair, and internal contract management is consistently applied. Importantly risk is transferred from the commissioning body.

Cost savings can arise from economies of scale as being part of a larger operation results in a pool of expertise which is kept up-to-date and can be deployed to other operations by the supplier. Private operators are often keen to adopt new technologies especially where these deliver efficiencies.

The most common method of operation is to let a large main contract, typically for a 5-year term and sometimes including break options and/or extensions, which encompasses all elements of the service. This requires careful specification (usually with assistance if this is the first time such a contract is let), and an 'OJEU'-style tendering process. A client team will still be required to interface with councillors and suppliers as well as perform some duties which have to be considered by the Local Authority (second stage appeals).

Figure 112. Outsourced SWOT table

Strengths • Pool of expertise to draw from which is kept well trained and knowledgeable • Economies of scale • Easier to scale up or down • Risk Transfer to provider • New services can be brought in quickly without large capital investment.	**Weaknesses** • Although margins are low, a proportion of the price will be taken as profit • Pricing can be high for services out-of-contract • Sub-contracting carries a management fee • Intangible customer service implications resulting from staff employed by a third party.
Opportunities • Benefit from industry change and innovation • Adopt new technologies quicker • Quicker procurement and equipment renewal • Expertise and economies of scale for purchasing.	**Threats** • Poor contracts / procurement can lead to Inflexibility • Poor future proofing, post contract with knowledge loss a risk • Complicated ownership of assets (e.g. handheld devices) • Bankruptcy or insolvency.

Watford is an example of an authority we have worked with who are very satisfied with the outsourced model. A well-resourced client team provides clear direction for the contract and a small, but skilled in-house team manages the contract. An example cited of where the approach worked well was around new parking arrangements around the football stadium where a partnership approach led to good outcomes.

12.6.1 Separate lots

Separate Lots, whereby the functions are split into multiple lots for procurement and letting separately, either at once, or staged to the market has been proposed in some places such as Hackney and Reading.

Some potential minor benefits potentially include competition between providers, and reduced management fees from the lead contractors.

Disadvantages include: little chance of economies of scale, compatibility and cooperation issues, separate tender process, reduced resilience, fewer savings during contract and union and staff relations.

Figure 113. Separate Lots SWOT Table

Strengths	Weaknesses
• Potential for greater flexibility • Easier to scale up or down	• Would still require a reasonably sized client team to manage the relationships • Pricing is likely to be higher as out-sourced operations will be smaller • Intangible customer service implications resulting fractured service delivery.
Opportunities	**Threats**
• Potential competition between suppliers to be seen as more efficient • Benefit from industry change and innovation • Expertise and economies of scale for purchasing.	• More points of weakness and failure; a single contractor failing could impact the entire service • Compatibility and cooperation issues between suppliers • Poor future proofing, post contract with knowledge loss a risk • Complicated ownership of assets (e.g. handheld devices) • Union and staff relations.

There are often suggestions to allow local and/or community interest organisations to bid for lots. This is likely to prove problematic because parking needs to conform to statutory guidance procedures and most functions require a detailed and up-to-date knowledge to comply with the law. A cooperative or similar organisation could be set up, but as far as we know none have been to date.

Multiple lots will require increased management resource for the Councils and invite added complexity. Experience would suggest getting contractors to work together without the guidance of the commissioning authority is the key barrier to success for this type of contract.

12.7 Other options

12.7.1 Off- Street Lease Disposals

As part of the decision-making process for a potential procurement with multiple lots the Councils could consider granting leases of some or all of its off-street car parking sites to a private company to operate.

Other councils, notably Westminster have carried out similar exercises successfully. In 2008, Westminster Council's 14 car parks (4,000 spaces) were operated under a management contract, and it retained responsibility for commercial aspects including pricing and maintenance. Significant investment was required to modernise the car parks in order to optimise the value of the portfolio and safeguard an important annual revenue stream. Following an options appraisal, it was agreed that a leasing option would be most beneficial and financial proposals were sought for 25-year leases on a full repairing and insuring basis, including proposals for initial investment to upgrade the facilities. This yielded 300 expressions of interest from around the world and 11 proposals. Q-Park was selected as preferred bidder. In the years following the grant of the lease the council increased its annual net revenue by £2 million with a guaranteed inflation-proofed minimum revenue for the next 25 years. Q-Park invested £10 million to improve the quality of the facilities and the council was no longer liable for commercial and maintenance responsibilities.

Since this transaction occurred the off-street parking market has rationalised and some of the larger operators such as NCP have been heavily impacted by the pandemic so there may be limited

appetite for this type of transaction at the current time, particularly as the Council has a diverse off-street parking estate including some car parks that are operated at a deficit.

Lease transactions also attract Stamp Duty Land Tax, the payment of which will reduce the amount available to pay as rent to the Councils. Finally, the levels of return on capital required by private operators are likely to be higher than the borrowing rates available to the Council, therefore investment in the car park estate and technology is likely to be more expensive.

There are likely to be legal risks if the Councils would like to control the level of parking charges in a lease agreement as it is likely (subject to specialist legal advice) that this will be in breach of the Competition Act 1988.

Figure 114. Off Street Leasing SWOT Table

Strengths • Provides fixed income stream • Can facilitate private investment in parking estate • Procurement process may be simpler.	**Weaknesses** • CC loses strategic control as every strategic element such as tariffs, opening hours, concessions etc. will need to be specified at the beginning of the agreement. • No share in future growth unless agreed at outset • Private sector profit margin will reduce amount available to CC. • Very limited flexibility to allow for the potential changes in parking estate. • Cost of Stamp Duty Land Tax
Opportunities • Property transaction so potentially quick transaction • Benefit from private sector expertise and innovation. • Expertise and economies of scale for purchasing.	**Threats** • More points of weakness and failure; a single contractor failing could impact the entire service • Poor future proofing, post contract with knowledge loss a risk • Private Sector companies have been financially impacted by Covid and are less rick averse and rents payable may be low to reflect this. • Private sector are unlikely to be interested in unprofitable car parks. • TUPE impact on staff.

The owner may impose operational covenants such as opening times, control on charges (providing this does not conflict with Competition legislation), service standards, etc. From our experience though, most operators will not accept any landlord control over the tariff policy within lease arrangements.

Break clauses can be negotiated in the owner's favour (but will be resisted by the operator) subject to the agreement being contracted out of the security of tenure provisions of the Landlord & Tenant Act 1954.

As stated previously, as a consequence of Covid, most of the larger established car park operators are now extremely nervous about signing up to long term rental arrangements without break clauses. Q-Park is still prepared to enter into up to 35 year leases, however their more recent offers have sought to share the risk with the car park owner with an initial lower fixed rent with an additional turnover rent over an agreed revenue threshold. On this basis the landlord has a one-off

opportunity to later secure a proportion of the turnover rent as additional fixed rent at any time over an agreed number of years.

The amount of private operator interest is difficult to predict, and a 'soft-market' testing exercise would be recommended should this be an option of interest to the Councils.

12.7.2 Joint venture/Partnership

Joint arrangements between local authorities are seen in the market e.g. the North Essex Parking Partnership (although this is in effect a department within Colchester Borough Council), and of course the current arrangements with the Norfolk Parking Partnership .

Figure 115. Joint Venture SWOT Table

Strengths • Potential for greater flexibility, but still retaining control • Easier to scale up or down than in-house and potentially, even contracted services.	**Weaknesses** • Limited by legislation around publicly controlled companies • Pricing could be higher than larger out-sourced operations by national providers • Set-up costs will be significant.
Opportunities • If well managed, pool of expertise to draw from which is kept well trained and knowledgeable • Benefit from industry change and innovation • Quicker to respond to industry changes and technology.	**Threats** • There may be no appropriate organisation willing or able to take on the role requiring a new company to be set up • Terms, conditions and staff team may remain as in-house • If across authorities, potential for competing priorities.

A joint arrangement can better create a critical mass and thus a higher level of interest from the market, in addition to encouraging economies of scale and realise some of the benefits of out-sourcing (expertise, cost control etc.).