Public Document Pack

NORTH HERTFORDSHIRE DISTRICT COUNCIL

OVERVIEW AND SCRUTINY COMMITTEE

TUESDAY, 11TH MARCH, 2025

SUPPLEMENTARY AGENDA

Please find attached supplementary papers relating to the above meeting, as follows:

Agenda No **Item**

8. **CALLED-IN ITEMS (Pages 3 - 66)**

To consider any matters referred to the Committee for a decision in relation to a call-in of decision.

At the time of publication, one item had been accepted as a Call-In, under 6.3.11 of the Constitution, regarding the Cabinet decision taken on 11 February 2025 on Proposed Parking Tariffs for 2025/26.

Following agreement from the Chair of Overview and Scrutiny Committee, it was agreed this item would be considered within this scheduled meeting, rather than as an extraordinary meeting.

Included in this pack are two supplementary documents to the item, Royston Town Centre Parking Survey Analysis Report, and Royston Town Centre Car Parking Charges Assessment.

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2020 CONSULTANCY

ROYSTON TOWN CENTRE PARKING SURVEY ANALYSIS REPORT

FOR NORTH HERTFORDSHIRE COUNCIL

JULY 2023

CONTENTS

1.0 INTRODUCTION

2020 Consultancy has been commissioned by North Hertfordshire Council to undertake parking surveys within Royston town centre car parks between 2pm and 5pm. The purpose of the parking surveys is to understand parking behaviours in the town once the free parking offer commences from 3pm. Undertaking a survey at 2pm provides an opportunity to compare usage before and after this initiative commences.

Traditionally, usage in car parks begins to reduce from 2pm onwards. However, with the free from 3pm initiative, it increases the likelihood of visitors staying in the town centre longer, or coming into the town at a time of day they wouldn't normally consider without the initiative in place. Although the council will lose out on the income generated by the car parks for visitors arriving after 3pm, it's expected that the town centre economy will be boosted with additional visitors arriving at this time.

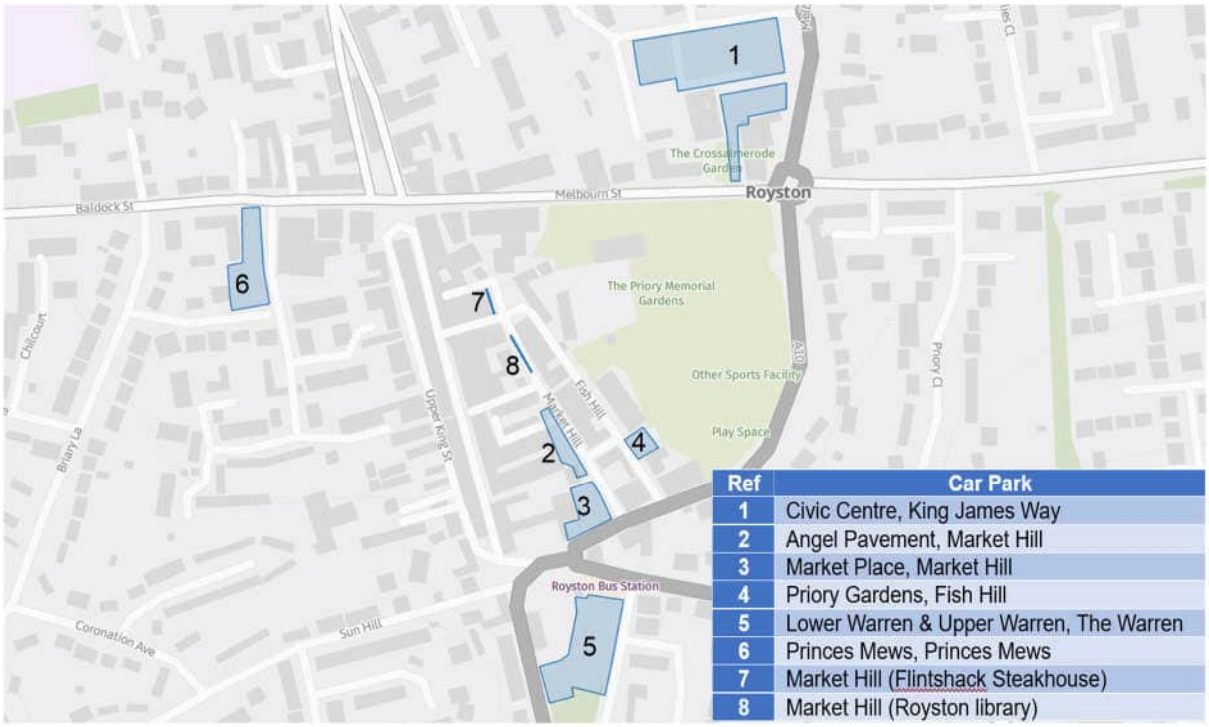
The requirement of this parking survey was to undertake parking surveys across all town centre car parks at hourly intervals to identify how the occupancy levels changed from 2pm onwards. The surveys also required the collection of vehicle registration data to understand how long vehicles were staying in the car parks.

The town centre car parks involved in the car park surveys included:

- Market Place, Market Hill;
- Angel Pavement, Market Hill;
- Priory Gardens, Fish Hill;
- Upper Warren, The Warren;
- Lower Warren, The Warren;
- Civic Centre, King James Way;
- Princes Mews, Princes Mews.

In addition to the car parks listed above, two on-street Pay & Display parking bays were included. One parking bay was along Market Hill outside the Flintshack Steakhouse restaurant, and the other was along Market Hill near Royston library.

Figure 1 illustrates the locations of the car parks and the two on-street Pay & Display parking bays that were included in the study within Royston town centre.



Ref	Car Park
1	Civic Centre, King James Way
2	Angel Pavement, Market Hill
3	Market Place, Market Hill
4	Priory Gardens, Fish Hill
5	Lower Warren & Upper Warren, The Warren
6	Princes Mews, Princes Mews
7	Market Hill (Flintshack Steakhouse)
8	Market Hill (Royston library)

Figure 1 – Location of car parks and Pay & Display parking bays in Royston town centre

2.0 PARKING SURVEY METHODOLOGY

As part of the process of undertaking parking surveys necessary to fulfil the requirements of this brief, there is a need to undertake parking occupancy surveys, and duration of stay surveys. Parking occupancy surveys involve visiting each car park on an hourly basis at 2pm, 3pm, 4pm, and 5pm to determine how many vehicles are parking in the car park. The 2pm survey is used to understand how occupied each car park is prior to the 3pm threshold, and the remaining three surveys are designed to monitor usage, tracking the expected reduction in usage. This can then be compared to similar towns that doesn't have the free from 3pm initiative in place.

In addition to the occupancy surveys, the brief stated that duration of stay surveys were required to determine how long vehicles were staying in the car park, and the turnover of spaces. This also provides the opportunity to understand whether vehicles are undertaking short-stay or long-stay parking. This is important as the designation of car park spaces may need adjusting to cater for the demand i.e. more long-stay parking spaces or more short-stay parking spaces. Undertaking the duration of stay surveys also provides the opportunity to understand the likely reasons for parking. For instance, if a vehicle is present for all surveys it may be a commuter or a resident. If a vehicle is present at just one survey, it's likely to be a visitor.

Private car parks for the use of specific businesses have not been surveyed or taken into account within the occupancy analysis. These car parks are outside of the scope of this project but nevertheless will still impact upon traffic flows, congestion, air quality, and, in many ways, demand at public car parks. In an ideal situation, the parking survey results should demonstrate a higher turnover of spaces in the core town centre car parks that would include Civic Centre and Lower & Upper Warren.

As requested in the project brief, the surveys were required on multiple weekdays and more than one Saturday. It was agreed to carry out the surveys on two weekdays, and one Saturday over a two-week period. Therefore, six separate survey days were included as part of the project. For the weekday surveys, a Tuesday, and Wednesday were chosen. The Tuesday represented a standard weekday, and the Wednesday represented a market day, when parking behaviours may differ. The two week survey period commenced on Tuesday 27th June 2023, and concluded on Saturday 8th July 2023. This timescale can be considered neutral weeks where standard parking occurs.

3.0 PARKING OCCUPANCY SURVEYS

Table 1 provide the occupancy data for each of the town centre car parks in Royston for the survey undertaken on Tuesday 27th June 2023.

Colours have been used to demonstrate the parking locations that are at the highest occupancy rates. Parking locations that are occupied between 75-84% are shown in yellow. At this level of occupancy, it should be possible to locate a parking space but will appear busy. Parking locations that are occupied between 85-94% are shown in amber. At this level, it may be difficult to locate a parking space, and it may be necessary to travel around the area to identify a space. This level of occupancy can cause some frustration with drivers.

Parking locations that are occupied at and above 95% are shown in red. At this level of occupancy, it will be very difficult to locate a parking space, especially in large car parks where it may require drivers to view every individual section to locate a space. With priority spaces such as disabled spaces, quite often there isn't any standard spaces available as it is only priority spaces available. If a parking location is regularly reaching and exceeding 85% occupancy, it may be necessary to consider providing greater parking provision or implementing measures that may discourage single occupancy journeys to car parks.

Car Park	Spaces (S)	2pm		3pm		4pm		5pm	
		Occ	% Occ	Occ	% Occ	Occ	% Occ	Occ	% Occ
Civic Centre	226	112	50	108	48	87	38	66	29
Angel Pavement	22	13	59	15	68	17	77	10	45
Market Place	34	19	56	32	94	26	76	25	74
Lower Warren	19	14	74	11	58	9	47	9	47
Upper Warren	94	44	47	46	49	42	45	27	29
Princes Mews	81	19	23	21	26	22	27	30	37
Priory Gardens	12	7	58	10	83	12	100	8	67
Total	**488**	**228**	**47**	**243**	**50**	**215**	**44**	**175**	**36**

Table 1 – Parking occupancy data for Royston town centre on Tuesday 27th (non-market day)

Table 1 illustrates that the peak parking period was 3pm, where across the town centre, the occupancy rate was 50%. This means there is sufficient parking capacity to supply the demand during the afternoon period at least in Royston. Table 1 demonstrates that the demand for parking increases by 3% (15 vehicles) between

2pm and 3pm. Traditionally, the trend for parking is to reduce between 2pm and 3pm. This suggests that the free from 3pm initiative is encouraging visitors into the town centre. It's unknown if they would visit earlier in the day if the initiative wasn't in place.

At 2pm, there wasn't any car parks demonstrating parking pressure, with the highest occupancy rate experienced in Lower Warren (74%). However, at 3pm, two car park started experiencing pressure, Market Place, and Priority Gardens. Both these car parks see a significant increase in demand. Market Place sees an increase of 38%, whereas Priory Gardens sees an increase of 25%. The other car parks in the town centre either see a small increase, or a reduction between the two survey times. This would suggest the area around Market Hill and Fish Hill is popular in the afternoon.

Table 1 highlights that at the 4pm survey, the parking demand increases further still for Priory Gardens, and increases for Angel Pavement. Priory Gardens occupancy at 4pm is at capacity. There is a children's play park located adjacent to the car park, and this time is in line with children finishing school, which may explain the high demand. Whilst the demand for Market Place reduces, it's still over the 75% threshold.

Figure 2 illustrates how the occupancy rate changes across each of the town centre car parks between 2pm and 5pm on the first Tuesday survey.

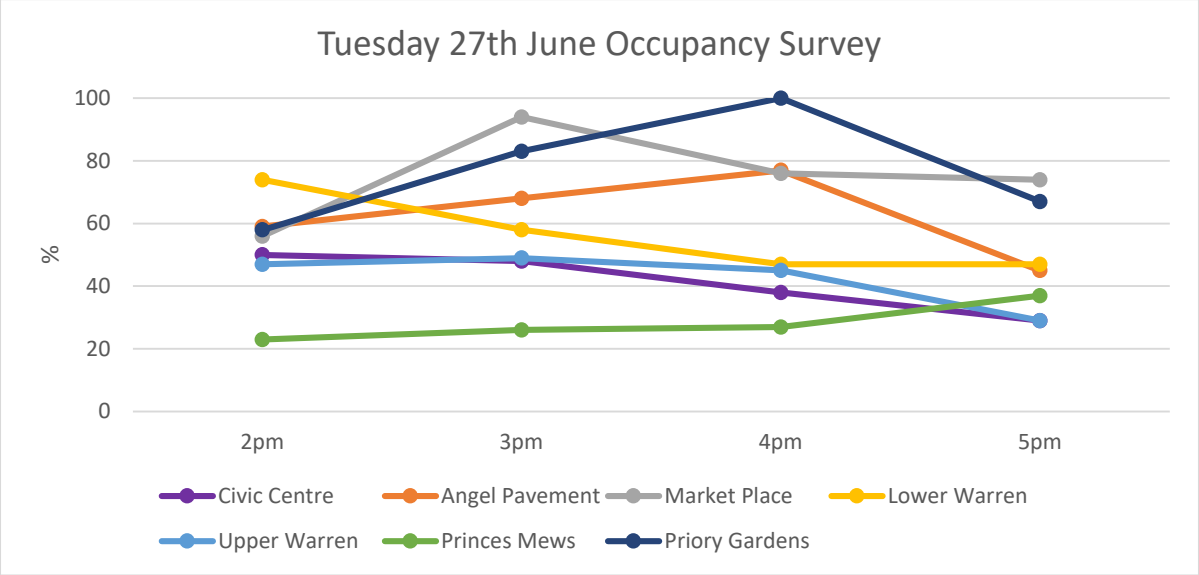


Figure 2 – Royston town centre car park occupancy rates Tuesday 27th June

Table 2 provide the occupancy data for each of the town centre car parks in Royston for the survey undertaken on Wednesday 28th June 2023 (market day).

Car Park	Spaces (S)	2pm		3pm		4pm		5pm	
		Occ	% Occ	Occ	% Occ	Occ	% Occ	Occ	% Occ
Civic Centre	226	94	42	94	42	92	41	65	29
Angel Pavement	22	7	32	12	55	14	64	17	77
Market Place	34	M	M	M	M	27	79	26	76
Lower Warren	19	17	89	16	84	15	79	7	37
Upper Warren	94	58	62	50	53	47	50	38	40
Princes Mews	81	28	35	30	37	32	40	31	38
Priory Gardens	12	11	92	9	75	11	92	6	50
Total	**488**	**215**	**44**	**211**	**43**	**238**	**49**	**190**	**39**

Table 2 – Parking occupancy data for Royston town centre on Wednesday 28th June (Market day)

Table 2 illustrates that the peak parking period was 4pm, where across the town centre, the occupancy rate was 49%. This means there is sufficient parking capacity to supply the demand during the afternoon period at least in Royston. Table 2 demonstrates that the demand for parking reduces by 1% (4 vehicles) between 2pm and 3pm. This differs from the Tuesday survey where there was a 3% increase. However, Market Place car park wasn't open due to the market, which may have influenced the data. The market day may also have impacted the data, with visitors wishing to travel into Royston earlier in the day to visit the market stalls.

At 2pm, there were two car parks demonstrating parking pressure. Priory Gardens had the highest demand with the car park at 92% capacity. Lower Warren car park was at 89% capacity. Both these car parks are relatively small, which will impact the data, and both are within close proximity to Market Place car park, which was closed due to the market. Although Market Place car park was still closed at 3pm, both car parks saw a reduction in demand, with Priory Gardens car park at 75% capacity, and Lower Warren car park at 84% capacity. The remaining car parks had ample space available.

As highlighted in table 2, there is a noticeable increase in parking demand at the 4pm survey. Across all the town centre car parks, an additional 27 vehicles were recorded in the car parks. Priory Gardens, and Lower Warren car parks were still demonstrating parking pressure, with an increase from the 3pm survey. Market Place car park was also demonstrating parking pressure with the capacity at 79%. As the market has concluded, the car park has reopened, and 27 vehicles have parked in the car park within one hour, this suggests that the car park is in high-demand in the afternoon.

There is a considerable reduction in parking demand between the 4pm and 5pm surveys. Between this time, 48 less vehicles were recorded across the town centre. However, Market Place, and Angel Pavement were still showing signs of parking pressure. Many of the town centre retail facilities close at 5pm, which may provide justification for the reduction in overall parking in the town.

Figure 3 illustrates how the occupancy rate changes across each of the town centre car parks between 2pm and 5pm on the first Wednesday survey.

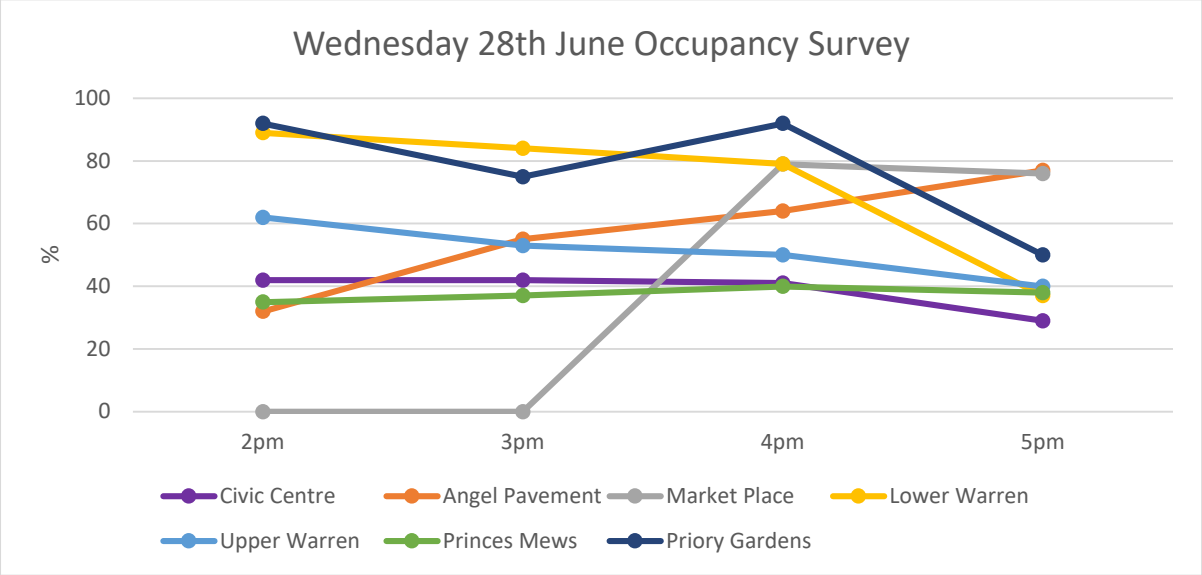


Figure 3 – Royston town centre car park occupancy rates Wednesday 28th June

Table 3 provide the occupancy data for each of the town centre car parks in Royston for the survey undertaken on Saturday 1st July 2023.

Car Park	Spaces (S)	2pm		3pm		4pm		5pm	
		Occ	% Occ	Occ	% Occ	Occ	% Occ	Occ	% Occ
Civic Centre	226	101	45	93	41	94	42	49	22
Angel Pavement	22	M	M	M	M	9	41	10	45
Market Place	34	8	24	26	76	24	71	22	65
Lower Warren	19	15	79	14	74	11	58	10	53
Upper Warren	94	49	52	32	34	31	33	16	17
Princes Mews	81	36	44	37	46	27	33	25	31
Priory Gardens	12	10	83	10	83	8	67	9	75
Total	**488**	**219**	**45**	**212**	**43**	**204**	**42**	**141**	**29**

Table 3 – Parking occupancy data for Royston town centre on Saturday 1st July

Table 3 illustrates that the peak parking period was 2pm, where across the town centre, the occupancy rate was 45%. This is lower than both the weekday peak periods during the first week of surveys. There are emerging findings that suggest that since the Covid-19 pandemic, parking behaviours have changed. Pre pandemic, in the majority of town centres it was common for Saturday to experience much higher parking demand. Since the pandemic, our parking surveys carried out in town centre environments appear to suggest that weekdays are now often busier than Saturdays.

Table 3 demonstrates that the demand for parking reduces by 2% (7 vehicles) between 2pm and 3pm. This reduction between 2pm and 3pm is similar to the Wednesday survey, which may have been due to the market. On the Saturday survey, there was a market in operation, although in this instance it was Angel Pavement car park that was closed as oppose to Market Place. Therefore, the Saturday data may also be impacted by the market, and the potential for visitors to arrive earlier.

At 2pm, there were two car parks demonstrating parking pressure. Priory Gardens had the highest demand with the car park at 83% capacity. Lower Warren car park was at 79% capacity. Both these car parks are the same two car parks that experienced parking pressure during the Wednesday surveys, which is likely due to the close proximity to Angel Pavement car park, and the market that was occurring at the time.

Whilst the parking demand increased at 4pm on the Wednesday survey, which coincided with the completion of the market and the opening of Market Place car park, the same patten was experienced on the Saturday survey. Demand across all town centre car parks reduced between 3pm and 4pm, with eight less cars recorded in town centre car parks. Traditionally, it is expected for Saturday demand in car parks to continuously reduce from 2pm onwards, as the demand is often earlier in the morning.

As highlighted in table 2, there is a noticeable increase in parking demand at the 4pm survey. Across all the town centre car parks, an additional 27 vehicles were recorded in the car parks. Priory Gardens, and Lower Warren car parks were still demonstrating parking pressure, with an increase from the 3pm survey. Market Place car park was also demonstrating parking pressure with the capacity at 79%. As the market has concluded, the car park has reopened, and 27 vehicles have parked in the car park within one hour, this suggests that the car park is in high-demand in the afternoon.

As expected, there is a sharp reduction in parking demand between the 4pm and 5pm surveys. Between this time, 63 less vehicles were recorded across the town centre. However, there was an increase in demand at Priory Gardens car park at 5pm, with the demand increasing from 67% to 75%. There was a slight improvement in the weather later in the afternoon, and this increase may be related to the children's play park that is located adjacent to the car park.

Figure 4 illustrates how the occupancy rate changes across each of the town centre car parks between 2pm and 5pm on the first Saturday survey.

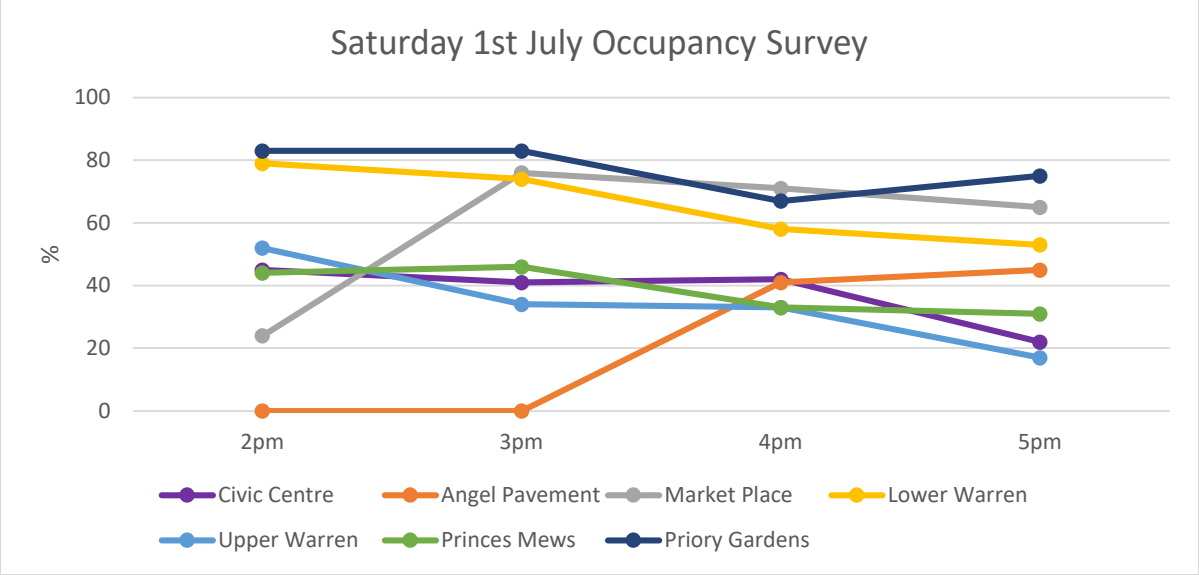


Figure 4 – Royston town centre car park occupancy rates Saturday 1st July

Table 4 provide the occupancy data for each of the town centre car parks in Royston for the survey undertaken on Tuesday 4th July 2023.

Car Park	Spaces (S)	2pm		3pm		4pm		5pm	
		Occ	% Occ	Occ	% Occ	Occ	% Occ	Occ	% Occ
Civic Centre	226	93	41	88	39	71	31	64	28
Angel Pavement	22	18	82	20	91	17	77	8	36
Market Place	34	31	91	34	100	24	71	23	68
Lower Warren	19	17	89	15	79	14	74	12	63
Upper Warren	94	56	60	48	51	41	44	24	26
Princes Mews	81	22	27	28	35	26	32	28	35
Priory Gardens	12	8	67	9	75	8	67	5	42
Total	**488**	**245**	**50**	**242**	**50**	**201**	**41**	**164**	**34**

Table 4 – Parking occupancy data for Royston town centre on Tuesday 4th July

Table 4 illustrates that the peak parking period was 2pm, where across the town centre, the occupancy rate was 50%. This means there is sufficient parking capacity to supply the demand during the afternoon period at least in Royston. Table 4 demonstrates that the demand for parking reduces marginally (three vehicles) between 2pm and 3pm. Whilst this is a reduction, the overall occupancy rate remained at 50%. The reduction in parking between 2pm and 3pm in town centre environments is often noticeable, which suggests that despite the minimal reduction in parking demand, the free from 3pm initiative is providing a positive impact in Royston.

Despite the ample availability of car parking spaces, there were three car parks experiencing parking pressure at the 2pm survey. However, the three car parks are three of the smallest in the town centre. They are also within close proximity to one another. Market Place had the highest demand, with the occupancy rate at 91% at 2pm. Lower Warren had an occupancy rate of 89%, and Angel Pavement had an occupancy rate of 82%. The same three car parks were also experiencing parking pressure at the 3pm survey, in addition to Priory Gardens. Market Place, and Angel Pavement saw an increase in demand, whereas Lower Warren saw a reduction.

Market Place car park as at capacity when the 3pm survey was undertaken. Angel Pavement only had two spaces remaining. As these car parks are next to each other, it's likely there is a link between this increase, although there wasn't nothing obvious noted from the survey team in terms of events that would increase parking demand.

There was a noticeable reduction between the 3pm and 4pm survey, and again between the 4pm and 5pm survey. Between 3pm-4pm, there were 41 less vehicles across all town centre car parks. Between 4pm-5pm, there were 37 less vehicles across all town centre car parks. At 4pm, Angel Pavement was the only car park experiencing parking pressure, and no car parks were experiencing pressure at 5pm.

There were limited differences between the data collected during the first Tuesday survey, and the data collected during the second Tuesday survey. Both dates had the same peak demand (50%), which occurred at 3pm for both dates, although the second Tuesday also had 50% demand at 2pm as well. Both dates also saw similar drop-offs in parking demand from 4pm onwards, with limited variation between the data.

Figure 5 illustrates how the occupancy rate changes across each of the town centre car parks between 2pm and 5pm on the second Tuesday survey.

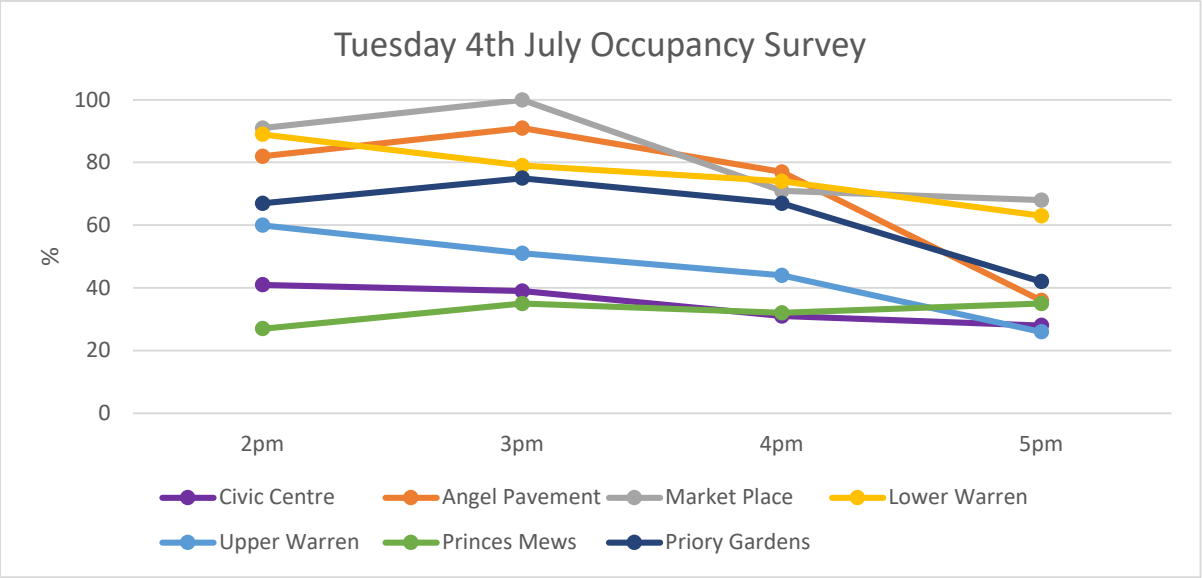


Figure 5 – Royston town centre car park occupancy rates Tuesday 4th July

Figure 6 provides a comparison between the two sets of data collected from the week 1, and week 2 Tuesday surveys. This illustrates how similar the parking behaviour is within Royston town centre. Princess Mews, and Civic Centre provide the most similar data across the two weeks, which is somewhat surprising as larger car parks.

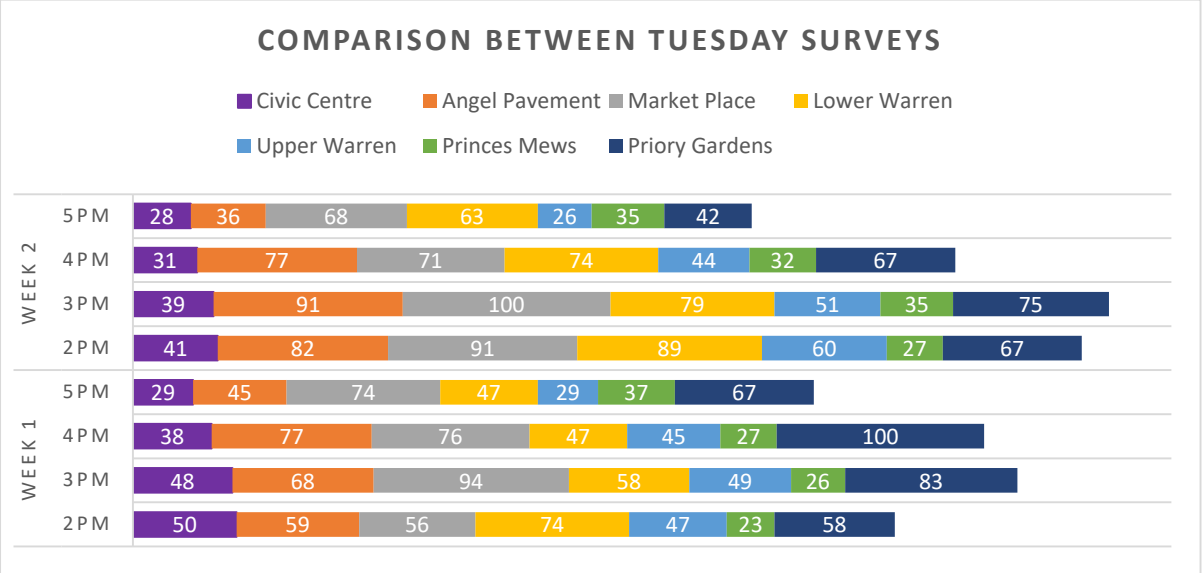


Figure 6 – Comparison between both Tuesday surveys

Table 5 provide the occupancy data for each of the town centre car parks in Royston for the survey undertaken on Wednesday 5th July 2023.

Car Park	Spaces (S)	2pm		3pm		4pm		5pm	
		Occ	% Occ	Occ	% Occ	Occ	% Occ	Occ	% Occ
Civic Centre	226	112	50	96	42	99	44	70	31
Angel Pavement	22	20	91	18	82	22	100	15	68
Market Place	34	M	M	M	M	15	44	19	56
Lower Warren	19	18	95	16	84	19	100	14	74
Upper Warren	94	62	66	59	63	63	67	47	50
Princes Mews	81	31	38	27	33	39	48	43	53
Priory Gardens	12	8	67	11	92	12	100	7	58
TOTAL	**488**	**251**	**51**	**227**	**47**	**269**	**55**	**215**	**44**

Table 5 – Parking occupancy data for Royston town centre on Wednesday 5th July

Table 5 illustrates that the peak parking period was 4pm, where across the town centre the occupancy rate was 55%. This is higher than at any point during the week one parking surveys. Table 5 demonstrates that the demand for parking reduces initially between 2pm and 3pm, before increasing significantly. Between the 3pm and 4pm survey, an additional 42 vehicles were recorded in the car parks. There is then a noticeable reduction between 4pm and 5pm, which is as expected based on the time.

Three car parks were at capacity during the 4pm survey, which included Angel Pavement, Lower Warren, and Priory Gardens. However, these are the three smallest car parks, and there was still plenty of parking availability across the other car parks, especially Civic Centre, and Princes Mews. It's worth noting that the three car parks at capacity are all within close proximity to one another, as is Market Place, which had only opened recently when the 4pm parking survey commenced.

The same three car parks demonstrated parking pressure during the 3pm survey, albeit the pressure was lower. Priory Gardens had the highest demand at 92%, which represents one parking space being available. Lower Warren had a demand of 84% (three spaces available), and Angel Pavement had a demand of 82% (four spaces available). During the 2pm survey, it was only Lower Warren (95%), and Angel Pavement (91%) that were showing parking pressures in the car parks.

There were similar patterns between the data collected during the first Wednesday survey, and the data collected during the second Wednesday survey, although the demand was higher during the second Wednesday survey. None of the survey times on the first Wednesday survey were higher than the second. The highest fluctuation

between the two surveys was 7%, which was the 2pm surveys. There was a 6% fluctuation between the two 4pm surveys, 5% fluctuation between the two 5pm surveys, and a 3% fluctuation between the two 3pm surveys. The lowest fluctuation occurring at 3pm suggests that there is a regular demand once parking become free.

Figure 7 illustrates how the occupancy rate changes across each of the town centre car parks between 2pm and 5pm on the second Wednesday survey.

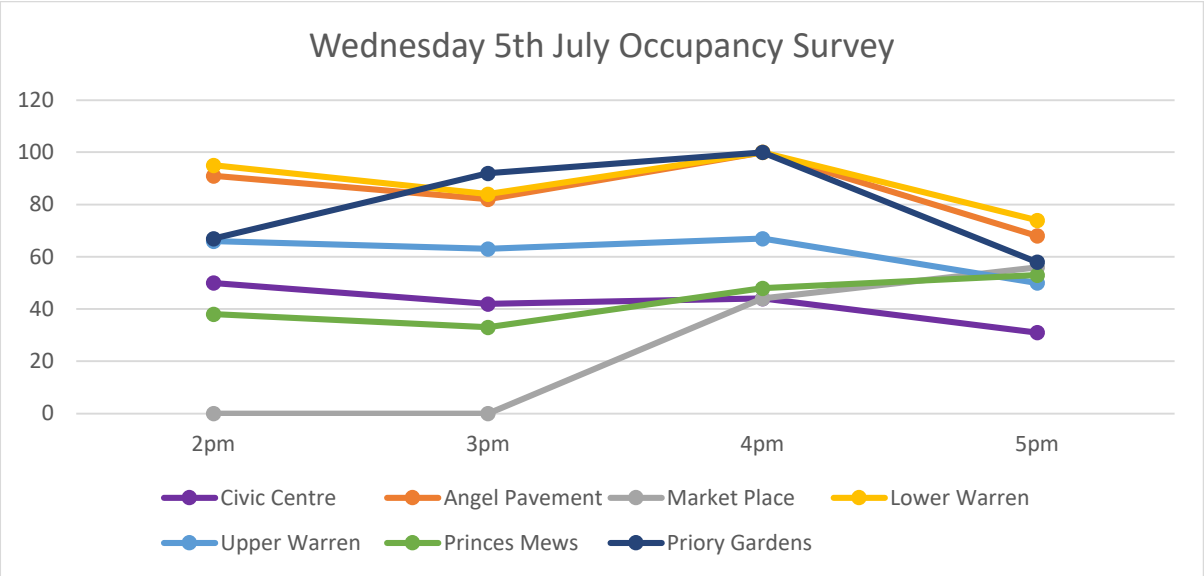


Figure 7 – Royston town centre car park occupancy rates Wednesday 4th July

Figure 8 provides a comparison between the two sets of data collected from the week 1, and week 2 Wednesday surveys. This illustrates how similar the parking behaviour is within Royston town centre. Civic Centre car park provides the most similar data across the two weeks, which is in line with the Tuesday survey comparison. Princes Mews has a greater fluctuation between the Wednesday surveys compared to the Tuesday surveys. Upper Warren has some similar data, and some less so.

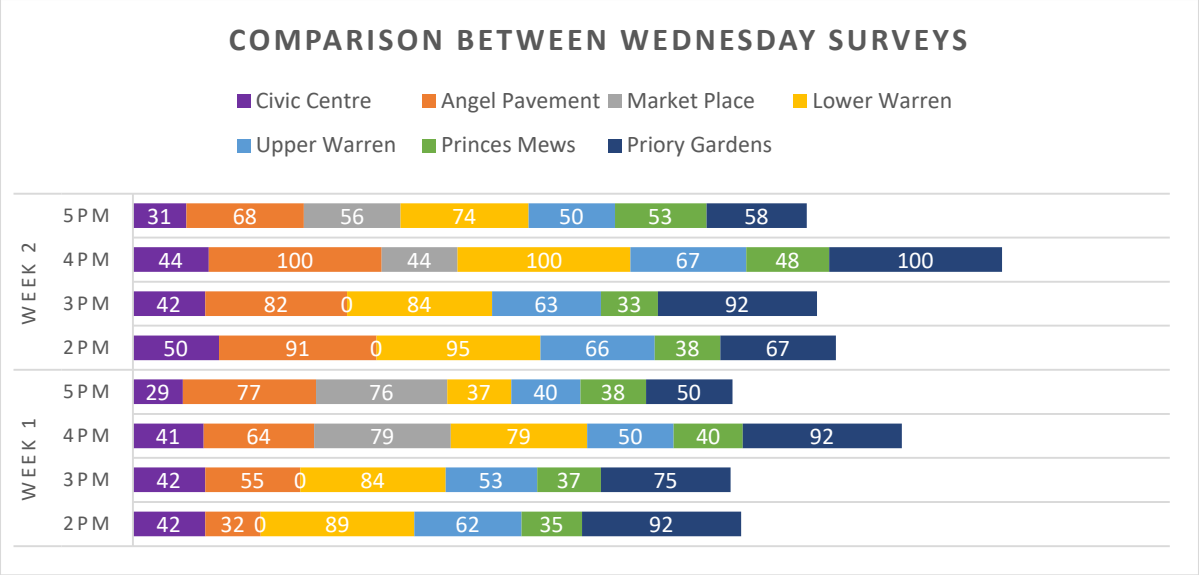


Figure 8 – Comparison between both Tuesday surveys

Table 6 provide the occupancy data for each of the town centre car parks in Royston for the survey undertaken on Saturday 8th July 2023.

Car Park	Spaces (S)	2pm		3pm		4pm		5pm	
		Occ	% Occ	Occ	% Occ	Occ	% Occ	Occ	% Occ
Civic Centre	226	65	29	62	27	60	27	31	14
Angel Pavement	22	6	27	11	50	9	41	12	55
Market Place	34	22	65	30	88	21	62	20	59
Lower Warren	19	19	100	14	74	17	89	9	47
Upper Warren	94	38	40	30	32	28	30	24	26
Princes Mews	81	38	47	41	51	31	38	32	40
Priory Gardens	12	8	67	7	58	8	67	7	58
TOTAL	**488**	**196**	**40**	**195**	**40**	**174**	**36**	**135**	**28**

Table 6 – Parking occupancy data for Royston town centre on Saturday 8th July

Table 6 illustrates that the peak parking period was at both 2pm, and 3pm, where across the town centre the occupancy rate was 40%. This is the lowest peak period from all six survey dates. Table 6 demonstrates that from 3pm there is a continued reduction in demand between the 4pm, and then 5pm surveys. This is a common trend on Saturdays where parking demand is higher in the morning and lower in the afternoon. There is a noticeable difference between the occupancy rates at 4pm and 5pm. During this hour, 39 less vehicles were recorded across all town centre car parks.

During the 2pm parking survey, Lower Warren was the only car park that experienced parking pressure, in which it was at 100% capacity. Whilst the percentage decrease between the 2pm and 3pm survey appears large (26%) this only equals five vehicles as the car park size is small. Demand increases again at the 4pm survey (89%). The only other car park that experienced parking pressure during the survey times was Market Place, which was at 88% capacity during the 3pm survey.

It should be noted that across most of the surveys, the weather wasn't considered good. There were spells of rain during all the survey times, apart from the 5pm survey. By this time, the weather had improved considerably, and there were spells of sunshine. This is likely to impact the car park occupancy rates, as visitors are less likely to travel into the town during rainfall.

The parking behaviour across Royston town centre was very similar between the two Saturday surveys undertaken. Whilst the first Saturday demonstrated higher demand, the occupancy pattens were almost identical. There was little difference between the 2pm, and 3pm surveys, a reduction between the 3pm and 4pm surveys, and a significant reduction between the 4pm and 5pm surveys. This would suggest that users of the town centre car parks on Saturdays visit Royton on a regular basis.

Priory Gardens was the only car park that demonstrated parking pressure on one of the dates but not both, which was the first. However, it's likely that many users of this car park access the playground adjacent to the car park. Due to the poor weather on the second Saturday, this is likely to reduce the demand for the car park.

Figure 9 illustrates how the occupancy rate changes across each of the town centre car parks between 2pm and 5pm on the second Saturday survey.

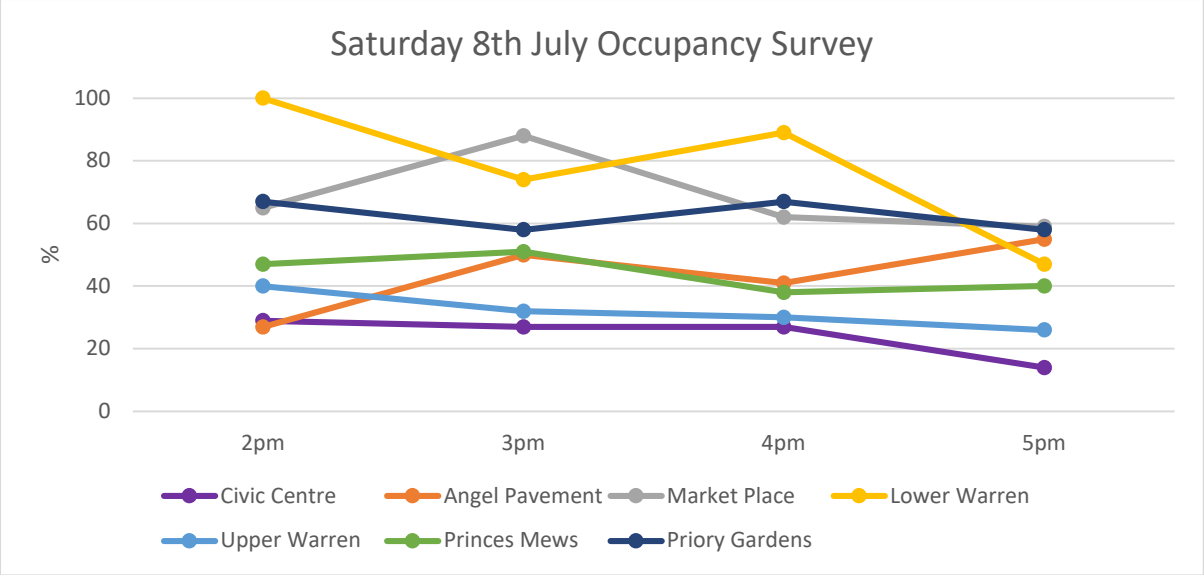


Figure 9 – Royston town centre car park occupancy rates Saturday 8th July

Figure 10 provides a comparison between the two sets of data collected from the week 1, and week 2 Saturday surveys. As stated above, the parking behaviour across all town centre car parks is similar. This is similar when comparing individual car parks, although while the ratio is similar, the overall numbers are different, as there was higher demand on the first Saturday survey. Princes Mews provides the most consistent similar data when reviewing individual car parks. This is followed by Civic Centre car park. These appear to be the most consistent car parks for usage data.

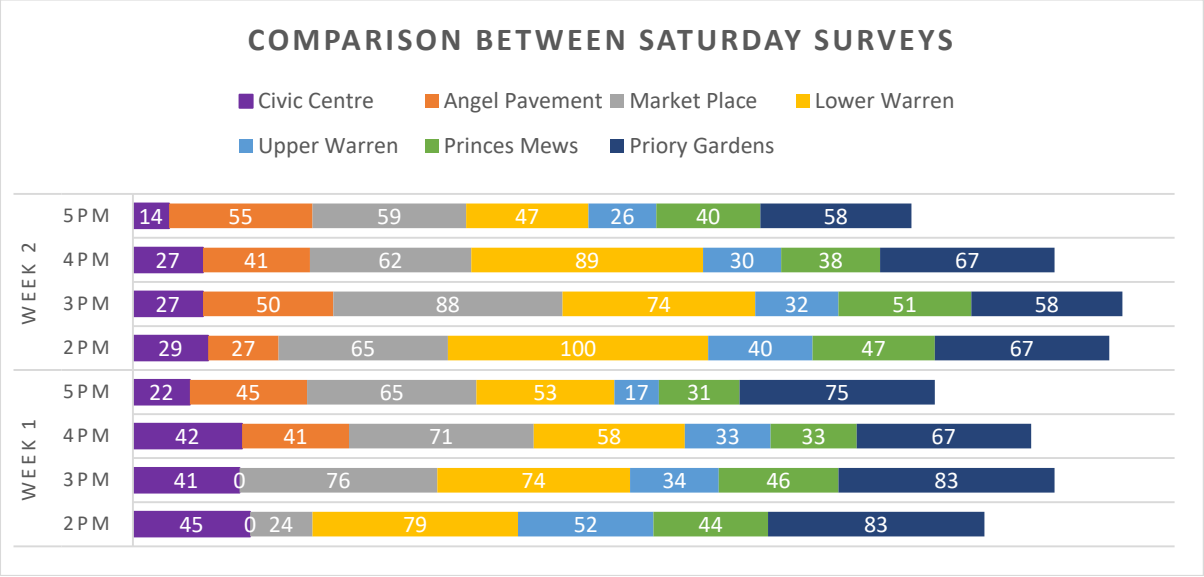


Figure 10 – Comparison between both Saturday surveys

Table 7 below details the number of spaces that were occupied at the specific peak periods along with the remaining spaces that were available across all car parks within Royston. As the table below details, there is more than adequate spaces remaining across all car parks at peak periods. Although there are specific periods during the day and week that have high volumes of use at specific car parks there is always more capacity to be found in alternative car parks.

Day	Peak	Total capacity for all car parks	Occupied spaces across the town	Remaining Spaces across the town
Tuesday 27/06/23	3pm	488	243	260
Wednesday 28/06/23	4pm	488	238	250
Saturday 01/07/23	2pm	488	219	269
Tuesday 04/06/23	2pm/3pm	488	245	243
Wednesday 05/06/23	4pm	488	269	219
Saturday 08/07/23	2pm/3pm	488	196	292

Table 7 – Parking capacity at peak periods for car parks within Royston

When comparing the parking fluctuation between 2pm, and 3pm when the free from three initiative comes into operation, there is a certain degree of variation between the data. There is only one date where the overall demand across the town centre car parks is higher at the 3pm parking surveys compared to the 2pm surveys. This occurred on Tuesday 27th June 2023, which was the first survey. There were two surveys where the parking demand was the same at both the 2pm, and 3pm parking surveys. These occurred on Tuesday 4th July, and Saturday 8th July 2023.

The highest fluctuation between the two survey times occurred on Wednesday 5th July. There was a 4% difference between demand at 2pm and 3pm. This equals 24 additional vehicles parking at 2pm. There was a 1% (Wednesday 28th June), and a 2% (Saturday 1st July) difference for the remaining two survey dates.

Although this would suggest that there is little increase between parking demand when parking charges are in operation, and when free parking is available, there are two surveys where the peak parking demand occurred at 4pm. On Wednesday 28th June, the peak demand was 49% at 4pm. This is a 5% increase compared to the 2pm survey. On Wednesday 5th July, the peak demand was 55% at 4pm. This is a 4% increase compared to the 2pm survey, and interestingly, a 8% increase to the 3pm survey.

This changes the narrative around the free parking initiative, as when considering the comparison between the 2pm survey and the peak survey (regardless of the time of survey), Saturday 1st July is the only survey where the demand was higher when parking charges were in operation. As previously stated, parking pattens do differ on Saturdays as there is a greater demand for morning parking compared to afternoon parking. This would suggest that the free from three initiative has a positive impact.

The two highest fluctuations between the 2pm and the peak demand surveys occurred on Wednesdays, which are market days in the town. As shown in the data, Market Place car park, which is closed during the survey fills up quickly once the car park re-opens from approximately 4pm. Although the car parks are smaller, there is a consistent pattern of Lower Warren, Market Place, Angel Pavement, and Priory Gardens having the highest demand in the afternoon. This suggests that this area has more attractions in the afternoon compared to larger car parks such as the Civic Centre, and Princes Mews. There is a gym, and a pub nearby, which may be trip generators that are bringing in additional visitors to the town centre in the afternoon.

This is reinforced when analysing the parking data for these four car parks only. Across all town centre car parks, the parking demand is within the 50-60% threshold. If the analysis is only carried out on the four car parks highlighted above, the parking demand is within the 70-85% threshold. This means that visitors arriving into Royston after 2pm are a lot more likely to park within the southern extents of the town.

Please find below an occupancy graph (figure 11) for all car parks within Royston. This illustrates how similar the parking behaviour is across the town centre. The Tuesday, Wednesday, and Saturday surveys all follow the same patten. This suggests that parking across the town centre is consistent with little deviation. This is generally considered a positive as it highlights no obscure trends that may impact strategy, and policy decisions made by North Hertfordshire Council. The data also provides reassurance that based on afternoon parking data, no concerns are raised with parking pressure across the town centre. Whilst individual car parks (generally smaller car parks) demonstrate some pressure, there is enough parking spaces available.

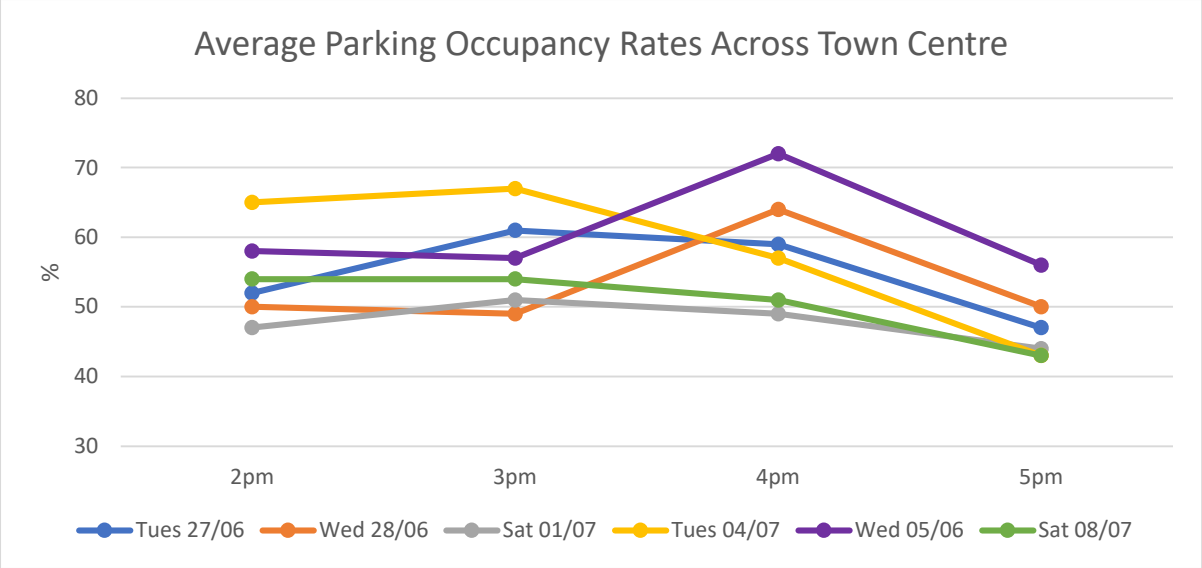


Figure 11 – Overall average parking occupancy percentage for all parking surveys

4.0 DURATION OF STAY SURVEYS

Duration of stay parking analysis was undertaken to understand the turnover of spaces. This plays an important role in the town centre economy. Data suggests if the turnover of spaces is too low it is likely that parking charges are too low, and visitors and shoppers are happy to loiter and may not spend the same amount of money as those who are visiting the town centre for shorter periods of time. If the turnover of spaces is too high it is likely that parking charges are high, the tariff structure isn't suitable, or the town centre offering isn't fit for purpose and visitors don't have the same opportunities to spend money.

To enable the identification of the turnover of car parking spaces, vehicle registration plate data is noted during each survey. This was collected during the occupancy surveys, so this data was collected at 2pm, 3pm,4pm, and 5pm. Business owners and employees are likely to be located in the car park for all four of these surveys, or at least three surveys. Vehicles that are present for more than two hours, but less than four hours are highly likely to be visitors or shoppers. Vehicles that are present for less than two hours are likely to be locals that will visit the town centre frequently.

For each of the car parks shown below the total number of vehicles recorded in parking spaces has been demonstrated (acts). The higher the number of acts in relation to the number of spaces, the greater the car park turnover is during the survey period.

Based on an all-day survey, it can be assumed that if a car park records fewer parking acts per bay than overall spaces, it is usually a good indication that the car park is not performing from an operational perspective, or the car park is a designated long-stay car park. It is likely that without the car park there wouldn't be a significant impact on the town centre and other town centre car parks (unless it's a designated long-stay car park. As this parking survey is covering a specific time period, this methodology isn't necessarily true. However, there is still expected to be a certain amount of acts occurring. Car parks should be demonstrating at least 0.5 acts per space.

The number of parking acts should reduce for each time period i.e. there should be more parking acts between 0-1 hours than 1-2 hours. The only caveat with this is parking acts over 3 hours as this covers more than a two-hour window.

Table 8 provides a breakdown of parking acts for each of the off-street car parks within Royston town centre from the Tuesday 27th of June survey.

Car Park	Acts (A)	Spaces (S)	A/S	0-1 Hours		1-2 Hours		2-3 Hours		>3 Hours	
				No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts
Civic Centre	188	226	0.83	94	50	43	23	17	9	34	18
Angel Pavement	39	22	1.77	27	69	9	23	2	5	1	3
Market Place	83	34	2.44	71	86	8	10	2	2	2	2
Lower Warren	19	19	1.00	9	47	2	11	2	11	6	32
Upper Warren	76	94	0.81	35	46	13	17	15	20	13	17
Princes Mews	70	81	0.86	54	77	11	16	3	4	2	3
Priory Gardens	29	12	2.42	22	76	6	21	1	3	0	0

Table 8 – Parking acts for all town centre car parks in Royston on 27/06/23

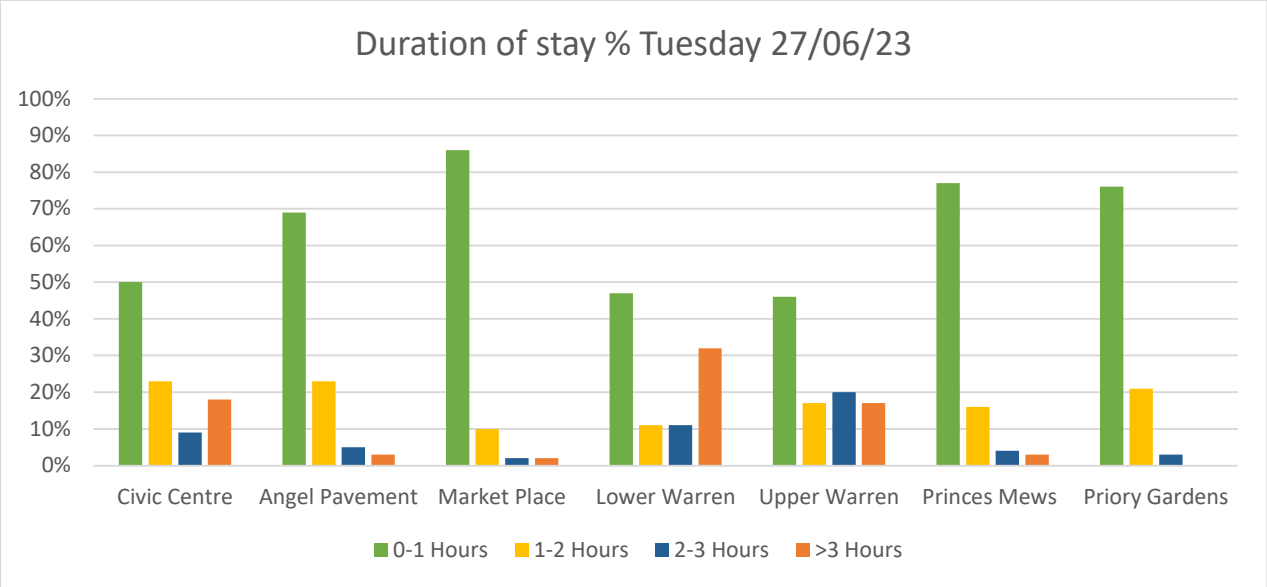


Figure 12 – Duration of stay percentage for Tuesday 27th

This demonstrates that across the town centre car parks, the overwhelming majority of parking acts are no more than one hour. The Civic Centre car park demonstrates a relatively high level of parking acts within the 1-2 hour category, and more than three hours. The vast majority of vehicles parking in the car park for three hours or more had permits displayed, and were present across the majority of survey dates. For some, this included the Saturday surveys as well as the weekend surveys.

Angel Pavement had over 20% of parking acts lasting between 1-2 hours, with minimal amounts of longer stay parking. Market Place had the highest percentage of short-stay parking acts, with 86% of acts being no greater than one hour.

Upper Warren, and Lower Warren car parks had similar data, with an almost identical percentage of 0-1 hour parking stays. Both these car parks had a high percentage of parking acts of three hours or more, especially Lower Warren car park, which had the highest rate across all car parks at 32%. Both these car parks appear to be popular with permit holders, with the vast majority of vehicles displaying a parking permit.

Table 9 provides a breakdown of parking acts for each of the off-street car parks within Royston town centre from the Wednesday 28th of June survey.

Car Park	Acts (A)	Spaces (S)	A/S	0-1 Hours		1-2 Hours		2-3 Hours		>3 Hours	
				No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts
Civic Centre	186	226	0.82	103	55	34	18	19	10	30	16
Angel Pavement	35	22	1.59	25	71	5	14	5	14	0	0
Market Place	45	34	1.32	41	91	4	9	0	0	0	0
Lower Warren	25	19	1.32	8	32	7	28	7	28	3	12
Upper Warren	100	94	1.06	52	52	19	19	13	13	16	16
Princes Mews	83	81	1.02	56	67	18	22	5	6	4	5
Priory Gardens	34	12	2.83	31	91	3	9	0	0	0	0

Table 9 – Parking acts for all town centre car parks in Royston on 28/06/23

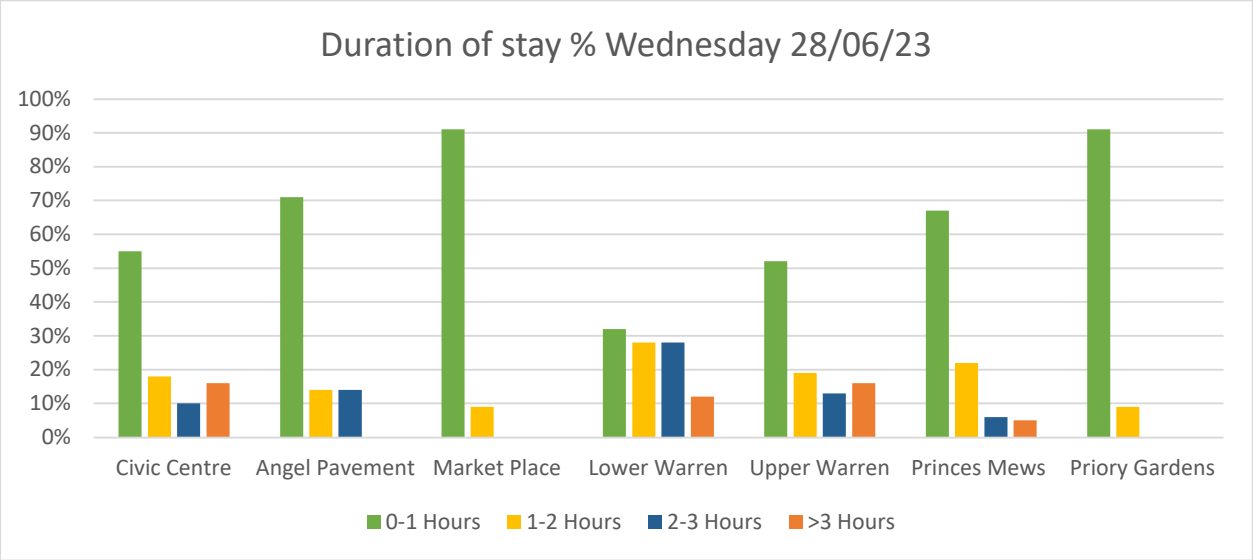


Figure 13 – Duration of stay percentage for Wednesday 28th

Once again, the overwhelming majority of parking acts are no more than one hour. There is a higher percentage of 2-3 hour parking stays compared to the Tuesday survey, but there are less three hour plus stays. Angel Pavement and Market Place only provide duration of stays of 0-1 hour, and 1-2 hour due to the closure for the market. This does distort the highest short-stay parking acts. Priory Gardens also demonstrates high short-stay parking with 91% of parking acts being no more than one hour.

Civic Centre, and Upper Warren car parks provide the greatest percentage of long-stay parking acts. 16% of the total acts within both these car parks were three hours or more. There were less long-stay parking acts in Lower Warren, although there was a high amount of 1-2 hour parking acts, and 2-3 hour parking acts demonstrated.

Table 10 provides a breakdown of parking acts for each of the off-street car parks within Royston town centre from the Saturday 1st of July survey.

Car Park	Acts (A)	Spaces (S)	A/S	0-1 Hours		1-2 Hours		2-3 Hours		>3 Hours	
				No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts
Civic Centre	204	226	0.90	124	61	42	21	21	10	17	8
Angel Pavement	15	22	0.68	10	67	5	33	0	0	0	0
Market Place	67	34	1.97	57	85	6	9	3	4	1	1
Lower Warren	21	19	1.11	8	38	4	19	2	10	7	33
Upper Warren	82	94	0.87	53	65	14	17	8	10	7	9
Princes Mews	93	81	1.15	70	75	16	17	6	6	1	1
Priory Gardens	28	12	2.33	23	82	3	11	1	4	1	4

Table 10 – Parking acts for all town centre car parks in Royston on Saturday 1st July

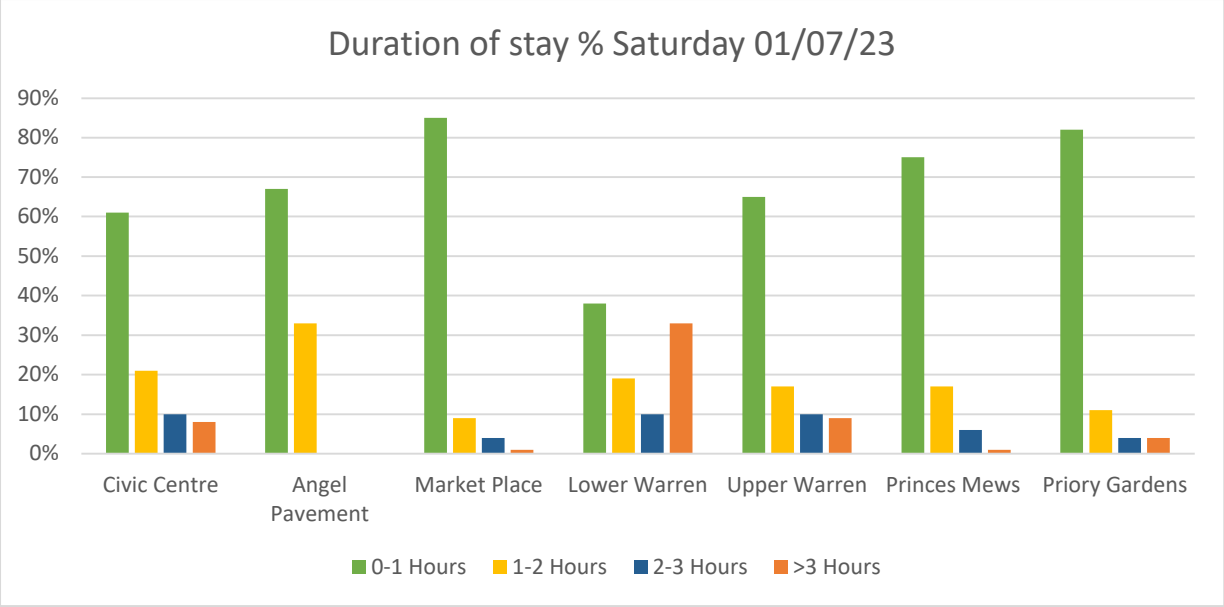


Figure 14 – Duration of stay percentage for Saturday 1st

Once again, the overwhelming majority of parking acts are no more than one hour. Broadly speaking, there were less long-stay parking acts on the Saturday compared to the weekday surveys. Lower Warren was the only car park that demonstrated more than 10% of the parking acts of three hours or more. In fact the percentage of these acts was 33%, which is the highest percentage across the week one surveys.

There was a relatively high number of parking acts between 1-2 hours. This is often the most common parking act on Saturdays where visitors are willing to spend longer in town centres. However, these figures are well below the 0-1 hour breakdown. As with the Wednesday survey, Angel Pavement had limited duration of stay data due to the market preventing usage from 2pm. Market Place (85%), and Priory Gardens (82%) demonstrated the highest percentage of 0-1 hour parking acts across the town.

Table 11 provides a breakdown of parking acts for each of the off-street car parks within Royston town centre from the Tuesday 4th of July survey.

Car Park	Acts (A)	Spaces (S)	A/S	0-1 Hours		1-2 Hours		2-3 Hours		>3 Hours	
				No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts
Civic Centre	176	226	0.78	98	56	35	20	19	11	24	14
Angel Pavement	47	22	2.14	38	81	4	9	3	6	2	4
Market Place	86	34	2.53	64	74	17	20	2	2	3	3

Lower Warren	30	19	1.58	17	57	4	13	1	3	8	27
Upper Warren	100	94	1.06	44	44	29	29	13	13	14	14
Princes Mews	73	81	0.90	48	66	17	23	6	8	2	3
Priory Gardens	24	12	2.00	20	83	2	8	2	8	0	0

Table 11 – Parking acts for all town centre car parks in Royston on Tuesday 4th July

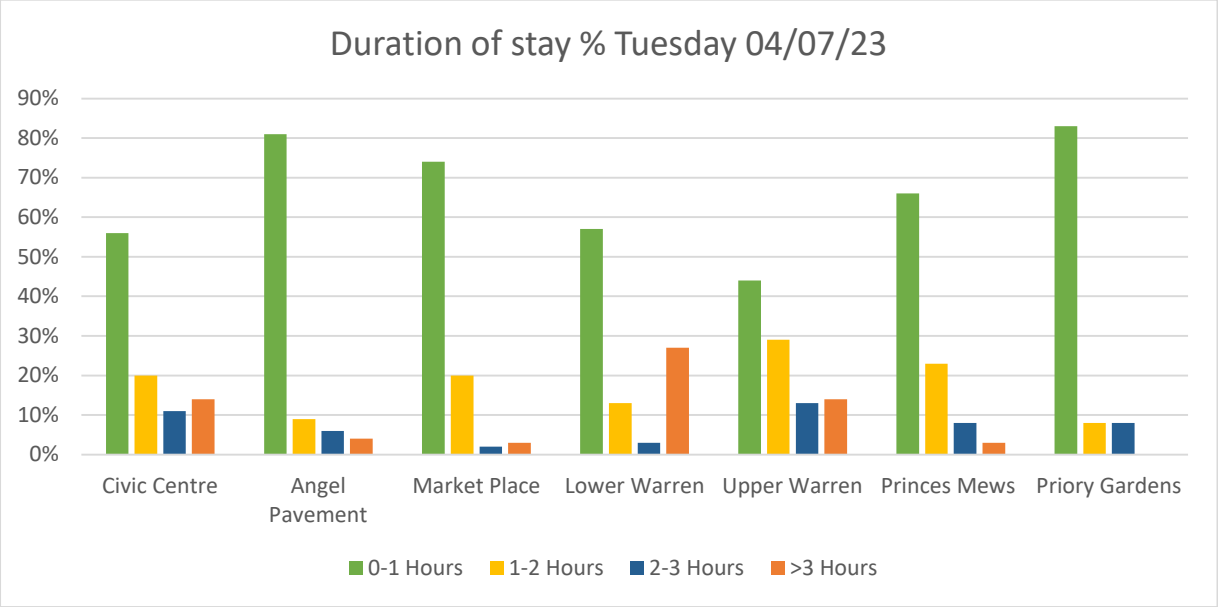


Figure 15 – Duration of stay percentage for Tuesday 4th

The duration of stay data from the second Tuesday survey is in line with the data collected from the first survey. There is many more 0-1 hour parking acts compared to the other durations. Priory Gardens, Angel Pavement, and Market Place provided the highest percentage of short-stay parking acts. Lower Warren provided the highest percentage of long-stay parking acts, with 27% of all acts being three hours or more.

Table 12 provides a breakdown of parking acts for each of the off-street car parks within Royston town centre from the Wednesday 5th of July survey.

Car Park	Acts (A)	Spaces (S)	A/S	0-1 Hours		1-2 Hours		2-3 Hours		>3 Hours	
				No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts
Civic Centre	193	226	0.85	97	50	34	18	27	14	35	18
Angel Pavement	58	22	2.64	43	74	9	16	5	9	1	2
Market Place	30	34	0.88	24	80	6	20	0	0	0	0
Lower Warren	26	19	1.37	9	35	5	19	2	8	10	38

Upper Warren	107	94	1.14	38	36	24	22	20	19	25	23
Princes Mews	98	81	1.21	66	67	23	23	6	6	3	3
Priory Gardens	28	12	2.33	21	75	5	18	1	4	1	4

Table 12 – Parking acts for all town centre car parks in Royston on 05/07/23

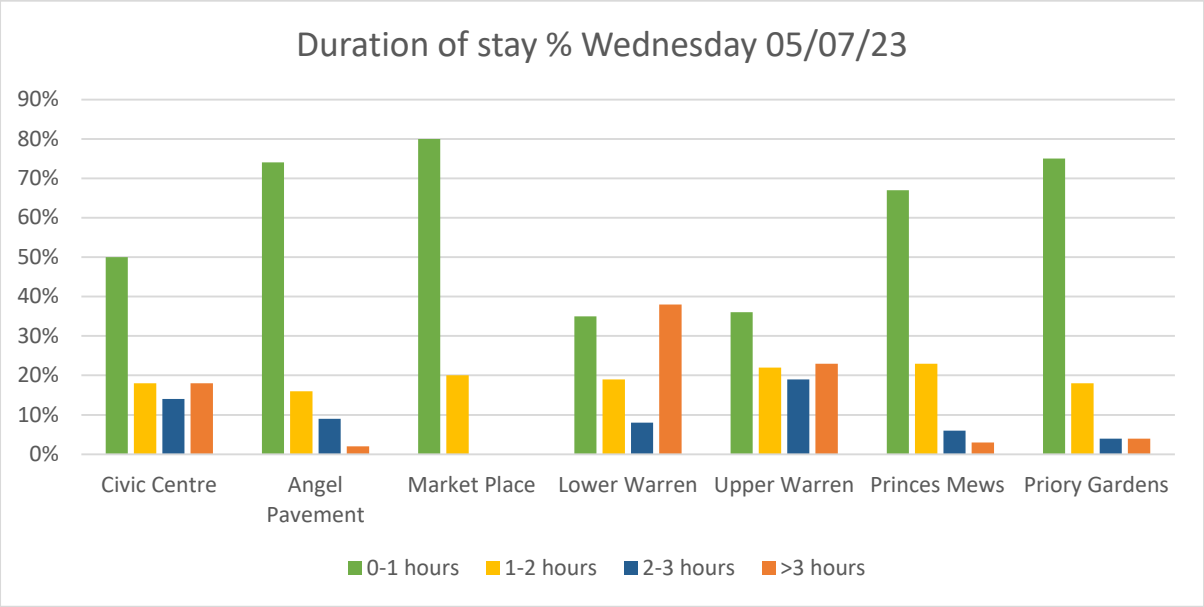


Figure 16 – Duration of stay percentage for Wednesday 5th

The duration of stay data from the second Wednesday survey is in line with the data collected from the first survey. There is many more 0-1 hour parking acts compared to the other durations. Priory Gardens, Angel Pavement, and Market Place provided the highest percentage of short-stay parking acts. There were slightly more 1-2 hour parking acts on the second Wednesday compared to the first. There were also slightly more 2-3 hour parking acts on the second Wednesday compared to the first.

Although Lower Warren has continuously proven to provide the highest amount of long-stay parking acts, the second Wednesday survey was the first and only occasion where the three hour plus duration of stay was higher than the 0-1 hour stay. Upper Warren, and Civic Centre also demonstrated relatively high levels of long-stay parking.

Table 13 provides a breakdown of parking acts for each of the off-street car parks within Royston town centre from the Saturday 8th of July survey.

Car Park	Acts (A)	Spaces (S)	A/S	0-1 Hours		1-2 Hours		2-3 Hours		>3 Hours	
				No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts
Civic Centre	139	226	0.62	86	62	28	20	15	11	10	7
Angel Pavement	27	22	1.23	20	74	4	15	2	7	1	4
Market Place	79	34	2.32	67	85	10	13	2	3	0	0
Lower Warren	35	19	1.84	21	60	4	11	5	14	5	14
Upper Warren	59	94	0.63	30	51	9	15	5	8	15	25
Princes Mews	96	81	1.19	60	63	23	24	8	8	5	5
Priory Gardens	22	12	1.83	15	68	6	27	1	5	0	0

Table 13 – Parking acts for all town centre car parks in Royston on 08/07/23

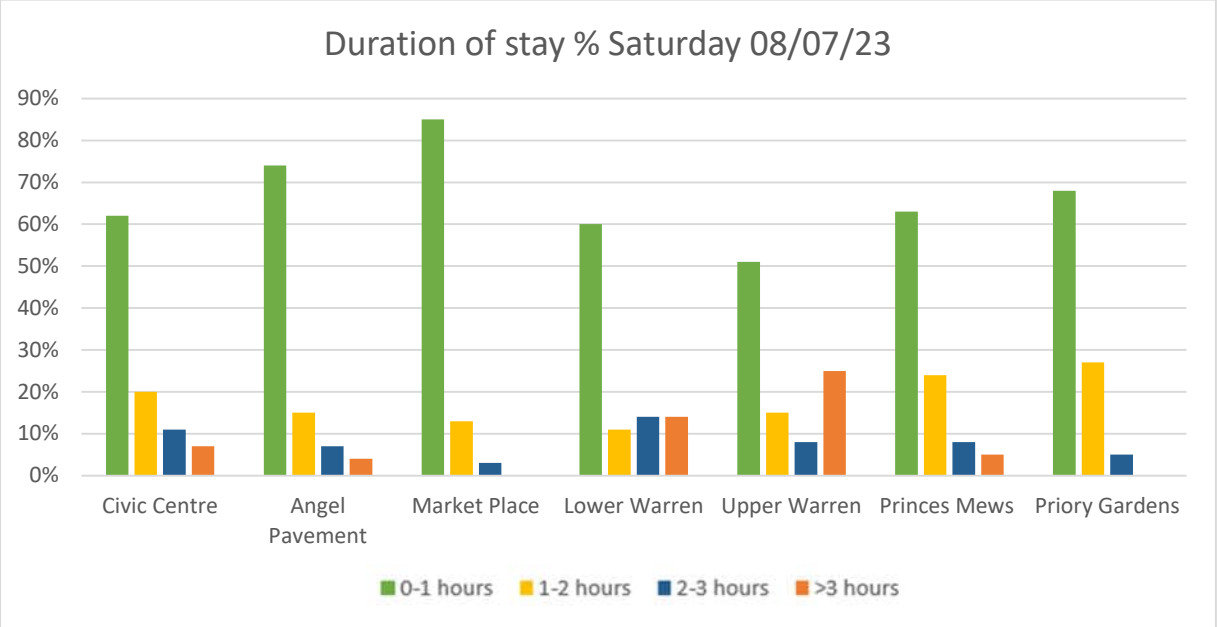


Figure 17 – Duration of stay percentage for Saturday 8th

Once again, the overwhelming majority of parking acts are no more than one hour. As with the first Saturday survey, there were less long-stay parking acts on the Saturday compared to the weekday surveys. However, there was a higher amount of long-stay parking on the second Saturday survey compared to the first. Both Lower Warren, and Upper Warren demonstrated that for the three hour plus duration, there was more than 10% of the parking acts. Upper Warren demonstrated more longer stay parking acts compared to Lower Warren, with 25% of the parking acts three hours or more.

Market Place, and Angel Pavement both demonstrated a high percentage of 0-1 hour parking acts, although both car parks were impacted by the Saturday market initially.

5.0 ON-STREET PAY & DISPLAY PARKING SURVEYS

In addition to the car park surveys that have been undertaken across the town centre car parks, there was a requirement to carry out surveys along the two on-street Pay & Display parking bays along Market Hill. One parking bay was along Market Hill outside the Flintshack Steakhouse restaurant, and the other was along Market Hill near Royston library. Figure 18 demonstrates the location of these two parking bays.

Figure 18 – Locations of the on-street Pay & Display parking bays

These parking surveys followed the same methodology as the car park surveys, which involved visiting the two sites each hour from 2pm through to and including 5pm. This was required on a Tuesday, Wednesday, and Saturday over a two-week period. Broadly speaking, on-street Pay & Display parking bays are usually subject to shorter stays compared to off-street car parks. This is due to the convenience these bays offer. However, on occasion they may be attractive for longer use i.e. due to location.

The two Pay & Display parking bays included within this study do differ. The parking bay along Market Hill outside the Flintshack Steakhouse restaurant has marked bays that provide eight parking bays. The parking bay along Market Hill near Royston library is a standard on-street bay that requires parallel parking, and as such doesn't have designated parking spaces. This means that the capacity of the parking bay needs to be calculated. This is achieved by dividing the total length of the bay (approximately 30 metres) by five, which is considered an appropriate length for a standard vehicle. Based on this, the parking bay near Royston library should provide six parking bays.

Tables 14-19 provide the occupancy data for the two on-street Pay & Display parking bays located along Market Hill for the Tuesday, Wednesday, and Saturday surveys across the two week period. For the purpose of these tables, Flintshack Steakhouse, and Royston library have been used to identify the two locations.

Car Park	Spaces (S)	2pm		3pm		4pm		5pm	
		Occ	% Occ	Occ	% Occ	Occ	% Occ	Occ	% Occ
Flintshack Steakhouse	8	8	100	8	100	6	75	5	63
Royston library	6	6	100	6	100	5	83	5	83
TOTAL	**14**	**14**	**100**	**14**	**100**	**11**	**79**	**10**	**71**

Table 14 – Parking bay survey data Tuesday 27th June

Car Park	Spaces (S)	2pm		3pm		4pm		5pm	
		Occ	% Occ	Occ	% Occ	Occ	% Occ	Occ	% Occ
Flintshack Steakhouse	8	7	88	8	100	7	88	7	88
Royston library	6	6	100	6	100	6	100	5	83
TOTAL	**14**	**13**	**93**	**14**	**100**	**13**	**93**	**12**	**86**

Table 15 – Parking bay survey data Wednesday 28th June

Car Park	Spaces (S)	2pm		3pm		4pm		5pm	
		Occ	% Occ	Occ	% Occ	Occ	% Occ	Occ	% Occ
Flintshack Steakhouse	8	6	75	6	75	7	88	4	50
Royston library	6	6	100	5	83	5	83	5	83
TOTAL	**14**	**12**	**86**	**11**	**79**	**12**	**86**	**9**	**64**

Table 16 – Parking bay survey data Saturday 1st July

Car Park	Spaces (S)	2pm		3pm		4pm		5pm	
		Occ	% Occ	Occ	% Occ	Occ	% Occ	Occ	% Occ
Flintshack Steakhouse	8	6	75	7	88	6	75	4	50
Royston library	6	5	83	5	83	5	83	5	83

TOTAL	**14**	**11**	**79**	**12**	**86**	**11**	**79**	**9**	**64**

Table 17 – Parking bay survey data Tuesday 4th July

Car Park	Spaces (S)	2pm		3pm		4pm		5pm	
		Occ	% Occ	Occ	% Occ	Occ	% Occ	Occ	% Occ
Flintshack Steakhouse	8	6	75	7	88	8	100	6	75
Royston library	6	6	100	5	83	6	100	5	83
TOTAL	**14**	**12**	**86**	**12**	**86**	**14**	**100**	**11**	**79**

Table 18 – Parking bay survey data Wednesday 5th July

Car Park	Spaces (S)	2pm		3pm		4pm		5pm	
		Occ	% Occ	Occ	% Occ	Occ	% Occ	Occ	% Occ
Flintshack Steakhouse	8	7	88	7	88	6	75	5	63
Royston library	6	5	83	5	83	5	83	5	83
TOTAL	**14**	**12**	**86**	**12**	**86**	**11**	**79**	**10**	**71**

Table 19 – Parking bay survey data Saturday 8th July

The results from the tables above illustrate that the demand is much higher for these parking spaces compared to the overall car park demand. This isn't a surprise as the overall number of parking spaces is much lower. The data is more in line with many of the parking surveys undertaken across the smaller car parks of Angel Pavement, Market Place, Priory Gardens, and Lower Warren. These parking bays are also located in a similar area. This may suggest that this area is a more desirable parking area compared to the areas where Civic Centre, and Princes Mews are located.

This data also reinforces the preference for on-street parking that is near key trip generators such as the core town centre environment, and the high street. Due to the demand for on-street parking there is less noticeable impact between demand when parking charges are in operation, and when free parking commences from 3pm.

Duration of stay parking analysis was also undertaken on the on-street Pay & Display parking bays to understand any separate pattens that may occur. As stated above, it's expected that these parking bays will demonstrate higher short-stay parking acts, and lower long-stay parking acts. These have been calculated following the same process that was used for the off-street car parks.

This data is presented in tables 20-25 below.

Car Park	Acts (A)	Spaces (S)	A/S	0-1 Hours		1-2 Hours		2-3 Hours		>3 Hours	
				No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts
Flintshack Steakhouse	27	8	3.38	19	70	7	26	1	4	0	0
Royston library	22	6	3.67	20	91	2	9	0	0	0	0

Table 20 – Parking acts for on-street Pay & Display bays on Tuesday 27th June

Car Park	Acts (A)	Spaces (S)	A/S	0-1 Hours		1-2 Hours		2-3 Hours		>3 Hours	
				No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts
Flintshack Steakhouse	29	8	3.63	21	72	5	17	2	7	1	3
Royston library	23	6	3.83	19	83	3	13	1	4	0	0

Table 21 – Parking acts for on-street Pay & Display bays on Wednesday 28th June

Car Park	Acts (A)	Spaces (S)	A/S	0-1 Hours		1-2 Hours		2-3 Hours		>3 Hours	
				No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts
Flintshack Steakhouse	23	8	2.88	18	78	4	17	0	0	0	0
Royston library	20	6	3.33	20	100	0	0	0	0	0	0

Table 22 – Parking acts for on-street Pay & Display bays on Saturday 1st July

Car Park	Acts (A)	Spaces (S)	A/S	0-1 Hours		1-2 Hours		2-3 Hours		>3 Hours	
				No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts
Flintshack Steakhouse	27	8	3.38	22	81	4	15	1	4	0	0
Royston library	22	6	3.67	19	86	3	14	0	0	0	0

Table 23 – Parking acts for on-street Pay & Display bays on Tuesday 4th July

Car Park	Acts (A)	Spaces (S)	A/S	0-1 Hours		1-2 Hours		2-3 Hours		>3 Hours	
				No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts
Flintshack Steakhouse	25	8	3.13	18	72	5	20	1	4	1	4
Royston library	20	6	3.33	20	100	0	0	0	0	0	0

Table 24 – Parking acts for on-street Pay & Display bays on Wednesday 5th July

Car Park	Acts (A)	Spaces (S)	A/S	0-1 Hours		1-2 Hours		2-3 Hours		>3 Hours	
				No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts	No. Acts	% Acts
Flintshack Steakhouse	27	8	3.38	23	85	4	15	0	0	0	0
Royston library	22	6	3.67	19	86	2	9	1	5	0	0

Table 25 – Parking acts for on-street Pay & Display bays on Saturday 8th July

Tables 20-25 above confirm the assumption that the majority of parking acts within the on-street Pay & Display parking bays are short-stay. This is likely due to the location of the parking bays, and the convenience this brings visitors. There is limited links between the parking charges and free parking, with only two vehicles being recorded within these parking bays across the six survey dates.

6.0 BENCHMARKING ANALYSIS

To support this analysis, and the broad assumptions made around the expected parking behaviour in town centres where there isn't the free from 3pm initiative in place, a benchmarking exercise has been undertaken to determine how Royston compares to other towns across the country. These towns have been chosen that provide similar characteristics. Examples of the characteristics considered include the size, and population of the town, and the economic offering. These are all locations where 2020 Consultancy have undertaken parking surveys within the last two years.

The towns that were chosen for the benchmarking comparison include the following:

- Billericay (Basildon);
- Pocklington (York);
- Louth (Lincolnshire);
- Sudbury (Babergh);
- Stowmarket (Mid-Suffolk).

Table 26 below details the comparison of average overall occupancy percentage for 2pm, 3pm, and 4pm counts. These times were chosen to provide a comparison between afternoon parking in towns similar to Royston to understand the pattens of demand. As suggested within this report, generally speaking, demand in car parks reduce throughout the day from 2pm onwards. This means it's expected that the 2pm survey has the highest percentage occupied. Please note, this data is from weekday surveys, as Saturday data provides differing results, especially in town centres.

Location	2pm Survey	3pm Survey	4pm Survey
Royston	**59%**	**61%**	**58%**
Billericay	73%	60%	53%
Pocklington	52%	49%	49%
Louth	58%	51%	49%
Sudbury	51%	43%	40%
Stowmarket	67%	61%	56%

Table 26 – % average overall occupancy on benchmarked locations

Table 26 demonstrates that apart from Royston, all other towns have a peak demand during the 2pm survey. Billericay demonstrates the highest reduction between the 2pm and 3pm survey, with a 13% decrease. Pocklington has a small reduction of just 3%, Louth has a greater reduction of 7%, Sudbury has a 8% reduction, and Stowmarket has a 6% reduction. There is a certain amount of consistency across all these towns.

The reduction between the 3pm and 4pm surveys are broadly smaller than the reduction between the 2pm and 3pm surveys. Billericay once again has the largest difference of 7%. Stowmarket has the second largest difference of 5%. The other towns have smaller differences ranging from 0%(Pocklington) to 3%(Sudbury).

Figure 19 below illustrates the parking behaviour from the benchmarking towns across the three survey periods included in this comparison. Royston is the only town to provide an increase from 2pm in comparison to the five benchmarking towns. This data should be sufficient to justify the initiative, and pose the question of whether North Hertfordshire Council should consider extending the initiative across other towns.

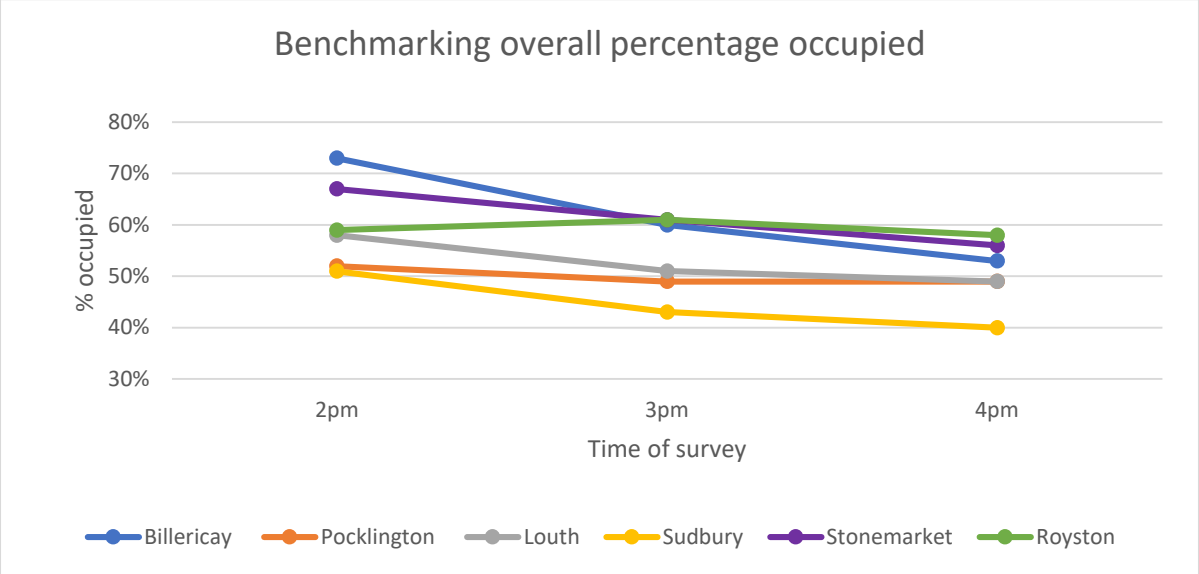


Figure 19 – Overall percentage occupied for three specific times for various locations.

7.0 PARKING SURVEY CONCLUSIONS

In conclusion to the parking surveys undertaken within Royston town centre over several weekdays, and two Saturdays, it's possible to summarise the findings.

Initially, it's possible to confirm that there is an appropriate amount of parking for the town centre based on the survey times of 2pm, 3pm, 4pm, and 5pm. Although there is parking pressure experienced in several car parks across the survey dates, these have generally been confined to Angel Pavement, Market Place, Priory Gardens, and Lower Warren car parks. These are the smallest car parks in the town. Whilst they are located within close proximity to each other, there is additional parking nearby, such as Upper Warren car park that has plenty of spare capacity during the afternoon.

Encouragingly, the data from the surveys suggests that demand in the town centre car parks often increases once the free from three initiative commences. This is likely to boost the town centre economy as it's likely that this increase in demand wouldn't occur without the initiative. This assumption is based on the results of the benchmarking exercise that highlighted that towns similar to Royston see a continued reduction in parking demand from 2pm onwards. It's unknown whether the users parking after 3pm would travel into the town earlier in the day without the initiative.

The data highlights that Wednesday appears to be the most popular day for travelling into Royston. It's unknown if this is related to the market day. This increase could be a direct result of the market or a consequence. For example, travelling into the town in the afternoon once the market has concluded. Morning surveys or interviews with visitors to the town centre would be required to better understand this.

There is a consistent high-demand for short-stay parking based on the duration stay data. All car parks has a high ratio of 0-1 hour parking acts. There are some car parks where longer-stay parking acts occur such as Civic Centre, Lower, and Upper Warren. These longer-stay parking acts are mostly permit holders parking on multiple days.

The free from three initiative appears to be more effective on weekdays compared to Saturdays. The data collected on the Saturday surveys demonstrates a more traditional reduced trajectory, which is more common on Saturdays compared to weekdays, due to the preference to visit town centres earlier in the day on Saturdays.

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2020 CONSULTANCY

ROYSTON TOWN CENTRE CAR PARKING CHARGES ASSESSMENT

FOR NORTH HERTFORDSHIRE COUNCIL

SEPTEMBER 2023

CONTENTS

1.0 INTRODUCTION

2020 Consultancy were commissioned by North Hertfordshire Council to undertake parking surveys within Royston town centre car parks between 2pm and 5pm. The purpose of the parking surveys was to understand parking behaviours in the town once the free parking offer commences from 3pm. Between 8am and 3pm, the car parks have charges in place. Surveys were undertaken to monitor usage during the free period.

Following on from these parking surveys, 2020 Consultancy have been recommissioned to undertake analysis and assess the impact there would be if parking charges were in place between 3pm and 6pm. This will enable the council to understand the potential income that could be generated during this time to determine the impact on the concession that is currently supplemented.

As part of this project, the council have requested three scenarios to be considered and tested relating to the introduction of parking charges between 3pm and 6pm. Option 1 involves the extension of the existing 2023/2024 parking tariff for Royston town centre car parks, which involves a £0.80 charge per hour, and differing rates for longer periods that is dependent on the car park. Option 2 involves a £0.50 flat rate between 3pm and 6pm, meaning visitors will pay that charge regardless of the length of stay between the period. Option 3 is the same as option 2, apart from the flat rate being £0.80 instead of £0.50.

There are seven council managed car parks in Royston that have been included in the scenario testing. Financial forecasts have been provided for each car park and include:

- Market Place, Market Hill;
- Angel Pavement, Market Hill;
- Priory Gardens, Fish Hill;
- Upper Warren, The Warren;
- Lower Warren, The Warren;
- Civic Centre, King James Way;
- Princes Mews, Princes Mews.

To acknowledge the risk of varying fluctuations based on a variety of considerations that are outlined in chapter 6, each financial forecast contains a small and large decrease forecast. The small forecast assumes a 10% reduction in demand based on parking

charges, and the large forecast assumes a 20% reduction in demand based on parking charges.

2.0 THE CONTEXT OF PARKING CHARGES IN TOWN CENTRES

Town centre vitality is a key issue across many of the towns in the UK, including large towns, and smaller market towns. Various studies have been undertaken into the economic impacts of town centres, and the future of high streets, with the evidence clearly suggesting that vibrant town centres are core to a healthy and prosperous economy. However, a number of factors make it difficult to maintain the vitality of some town centres, and to enable previously vibrant centres to regain their vitality.

The role of car parks has been changing in recent years, before, during and after the pandemic. Prior to the pandemic, there was a subtle change occurring in the usage of car parks, from the traditional town centre trips, shifting towards a greater mixture of retail and leisure. This change was exacerbated significantly due to the Covid-19 pandemic where retail facilities were closed for several months over a period of 14 months between March 2020, and May 2021. The shift away from car parking trips for retail purposes has been largely a result of the increase in online shopping.

In addition to this, out of town shopping centres that provide a more concentrated level of retail, and leisure facilities has reduced the demand for trips into traditional town centre environments. Although there will be a cost for parking integrated into these facilities, having no parking charges in place in the car park will make this attractive to residents, and visitors to the area.

Due to the increase in investment into out of town shopping centres, it's expected that the value of property owned out of town has now overtaken that held in town centres. There has been a continued increase in out of town retail floor space, whilst at the same time, there has been a continued reduction in-town retail floor space. Furthermore, the economic downturn have added further pressures to household budgets, and so to consumer spending. The economic downturn has also resulted in pressure on local authorities revenue streams that can include car parking charges.

In more recent time, the introduction of car parking spaces has been relatively piecemeal, and focused on regeneration and redevelopment of areas. Historically, car parks were sited in the most desirable locations to be as close as possible to town centre

environments. In North Hertfordshire, the towns such as Royston, Hitchin, and Letchworth are focused around serving the high street and the core town centre environment, which is the key trip generator in the towns. In comparison, a town such as Stevenage has parking for the town centre, but there are a satellite of car parks serving various new developments and shopping centres, providing a different model.

While plenty of commentary and reporting is available in relation to car parking charges, it is currently unclear how much of it goes beyond anecdote, or the aggregated recollections of members of the business community. As a consequence, it's difficult to provide a justification for the introduction of parking charges, or provide a justification for retaining free parking periods such as the free from 3pm initiative that is in operation in Royston through data alone.

It's worth noting that there are two key aspects of why parking charges can be introduced in town centre car parks. Firstly, car parks are not free to provide regardless of whether the operator is public or private. Town centres have high density of use and a short supply of available land. This makes space in the town centre relatively expensive. Land owners who decide to provide car parking have to calculate the opportunity costs of not having an alternative use. Furthermore, car parks have a limited lifespan meaning the costs of depreciation must be recovered to enable reinvestment. Finally, the general costs of management, maintenance and enforcement must be taken into account.

Secondly, the introduction of parking charges will change driver behaviour. Due to the increasing levels of car ownership, parking pressures in town centres can be extreme, especially during peak periods. Unrestricted parking will lead to congestion, obstructions, pollution and spaces being occupied by the wrong users at inappropriate times.

Parking charges can be utilised to manage demand, targeting specific types of users at different times of the day. For example, parking charges can be introduced to prevent long-stay parking i.e. Royston's free parking from 3pm. This prevents all-day parking, which will be most likely commuter and business parking. This type of car park user isn't likely to spend as much as visitors travelling into the town centre. This can have a negative impact on the town centre, and if this is frequently occurring across town centre car parks, can have a noticeable impact on the local economy.

Parking charges can also manage the distribution of traffic within town centre car parks. Introducing short-stay and long-stay parking tariffs can direct vehicles to the most appropriate car park. Short-stay car parks should generally be closest to the most in-demand key trip generators such as high streets. Long-stay car parks are more likely to be used by users seeking all-day parking. These car parks often work more efficiently away from the core area to ensure visitors can access this area. This is likely to increase spending, and boost the local economy. Providing different parking tariffs based on whether the car park is short-stay or long-stay will mange parking behaviour. A long-stay parking user is unlikely to pay a higher rate to park in a short-stay car park.

Parking charges can also be used to manage demand in car parks. Concessions or lower rates can be introduced in car parks that have issues with under utilisation for specific reasons such as location. It's also possible to introduce a higher parking tariff for the most desirable car parks. Likewise, a local authority may make the decision to introduce car parking charges in the more desirable car parks, but provide free parking in less desirable car parks.

Alongside the distribution and management of parking behaviour in car parks, parking charges can also provide a useful platform to encourage modal shift to more sustainable transport. If there are no parking charges in town centre car parks, the likelihood of a resident, commuter, or visitor using sustainable transport is much lower than it would be if there were parking charges in place. Unless the sustainable transport option is also useable without charge, there will be a financial incentive to travel by car.

There is a much greater emphasis on parking strategies and action plans focusing on carbon reduction, and modal shift to resolve parking capacity issues as opposed to seeking to provide additional parking spaces in town centres.

3.0 JUSTIFYING PARKING CHARGES

Local Authorities may feel they can justify the implementation of parking charges in town centre car parks because there is a perception that everywhere does it. However, introducing parking charges is not as straightforward as this. Introducing parking charges will be a highly political and contentious issue, which will require a full justification. If a local authority cannot demonstrate suitable reasons for introducing parking charges, it's almost certain that local members and committees will not provide sufficient support to enable the implementation to progress. This applies to initiatives such as in Royston.

Considering the introduction of parking charges is generally a two-stage process, with both stages having a number of steps involved in the process. Stage one is to determine whether the introduction of parking charges in an individual town is justifiable. Under no circumstances should a local authority ever consider a blanket approach across multiple towns. Each town should be considered individually as the offering of a town will change.

If the outcome of stage one is that one or more specific town centres justify parking charges, it will be possible to move onto stage two. As highlighted across the country, there is a multitude of different payment tariffs, and pricing structures in place in town centre environments. Stage two of the process provides the opportunity for the local authority to consider the most suitable parking tariff and structure for implementation.

There is a misconception that when parking charges are introduced, the negative impact on town centre economies, and the reduction of visitors to the town is related to stage one of the process. This isn't the case, as otherwise all town centre locations where there are parking charges in place would experience this downturn, in which there is evidence to suggest isn't the case. If the introduction of parking charges is to create a negative impact on the town centre, this will be directly related to stage 2.

Failure to set the appropriate parking tariff structure will increase the potential for parking charges to create a negative impact on the town significantly. The most common reason this will occur is if the parking tariff is excessively high in relation to the town's offering. For example, if the cost of parking in Royston was the same as Birmingham, this would likely result in a reduction in the town centre economy, and visitors travelling to Royston. This is because there aren't enough trip generators, to justify the high parking tariff structure.

4.0 PARKING CHARGE OPTIONS

There are a number of different approaches that can be considered when introducing parking charges, or changing the hours when parking charges are in operation. Some options wouldn't be relevant for North Hertfordshire Council to consider as they are designed for more larger towns and cities, with far greater parking provisions.

As part of this assessment into the free from 3pm initiative in Royston town centre car parks, three parking charge tariff options have been considered. These include:

- Option 1 - 2023/2024 North Hertfordshire tariff structure 8am-6pm;
- Option 2 - Flat rate of £0.50 between 3pm and 6pm;
- Option 3 - Flat rate of £0.80 between 3pm and 6pm.

For the 2023/2024 North Hertfordshire tariff structure option 1, there would be no concessions in place in council managed Royston car parks between 3pm and 6pm. The cost of parking per hour would remain in line with the period between 8am and 3pm. As there would be no concession, this option would generate the most income for the council if existing parking behaviours remained the same.

However, as there would be no concessions, this option would be the most likely to see a reduction in occupancy between 3pm and 6pm, due to the higher cost of parking involved. The additional cost per hour would be £0.80 for all car parks. For short-stay parking acts, this may not discourage use significantly. However, for longer-stay parking acts, the price increase could be between £1.20 and £5.00 for three or more hours, which is dependent on the car park chosen i.e. it's £1.20 in the Civic Centre, and £5.00 in Princess Mews.

Option 2, which proposes a flat rate of £0.50 between 3pm and 6pm is the option most likely to minimise the impact of car park occupancy between 3pm and 6pm. As a flat rate, the tariff will remain the same regardless of the length of parking. The option will be more favourable for long-stay visitors as £0.50 for a three hour period will be seen as much better value for money compared to £0.50 for one hour. However, this option will generate the lowest sum of income for the council as the lowest cost tariff option.

Option 3, which proposes a flat rate of £0.80 between 3pm and 6pm is likely to have an impact on car park occupancy between 3pm and 6pm, although it's not possible to determine the level of impact at this stage. What was established during the duration of

stay surveys undertaken across council managed Royston town centre car parks is that the vast majority of parking acts are only up to an hour between 3pm and 6pm. 63% of parking acts between this time are no more than one hour. Based on this, the impact could be higher than it would if there were high amounts of longer stay parking.

4.1 PERCENTAGE INCREASE AND DECREASE ON FINANCIAL TOTALS

There are several factors that need to be considered when forecasting revenue for car parks. Projected revenues need to take in several variables when considering total revenues. Variables such as implementation period, town centre offering, public transport, and Weather at the time of implementation. In experience it is justified to consider a higher and lower total revenue based on these variables. It is often that increases or decreases in projected revenues are only experienced for a short time after implementation, likely to be 1-2 months. Once this period is over revenues are likely to stabilise back to standard. These higher and low total revenue projections are offered within this assessment to help manage members expectation.

4.2 IMPLEMENTATION

When and if any of the aforementioned options are implemented, the process should be assessed based on when best to implement the tariff change. This is because the outcome can vary considerably based on when this is implemented due to unknown variables such as stakeholder response and economic vitality. If the implementation of tariff increases were actioned at the start of summer this could lead to a revenue loss due to the nicer weather being a possible factor of car park users using alternative means of transport. If changes were implemented around October/November, the effects on revenue are likely to be minimal due to the poorer weather and the need for users to shop for Christmas. Subsequently, any effects felt by the implementation are likely to dissipate before the following summer. In Conclusion, the exact implementation time for proposed changes to tariff charges should be assessed by officers.

5.0 SCENARIO TESTING OF PARKING CHARGES IN CAR PARKS

As outlined above, three parking charge options have been considered as an alternative to the existing free from three initiative that currently exist in council managed car parks in Royston town centre. To maximise overall analysis the data has been divided into weekday forecasts and Saturday forecasts to enhance the future considerations that can be made.

5.1 BASELINE DATA

Prior to testing different parking charge tariff scenarios, there is a need to have baseline data available that can be used to calculate income that can be generated with parking charges. Whilst occupancy survey data would demonstrate how many tickets would need to be purchased, this doesn't provide the length of stay. Therefore, the duration of stay surveys undertaken as part of the work already undertaken have been used as the baseline data. This data provides a breakdown of how long each visitor stayed in the car park between 2pm and 6pm when the surveys were conducted.

The car parks below have been included within the scenario testing:

- Angel Pavement;
- Civic Centre;
- Market Place;
- Princess Mews;
- Priory Gardens;
- Upper Warren;
- Lower Warren.

Table 1 below provides the baseline data for the analysis on all the above car parks for weekdays.

Car Park	Spaces	Acts	0-1 Hour	1-2 Hour	2-3 Hour
Angel Pavement	22	32	25	4	3
Civic Centre	226	138	78	29	31
Market Place	34	64	47	13	4
Princess Mews	62	57	35	14	8
Priory Gardens	12	18	15	2	1
Lower Warren	19	25	15	2	8
Upper Warren	94	83	48	15	20

Table 1 – Duration of stay data for Royston town centre car parks for Monday-Friday

Table 2 below provides the baseline data for the analysis on all the above car parks for Saturdays only.

Car Park	Spaces	Acts	0-1 Hour	1-2 Hour	2-3 Hour
Angel Pavement	22	23	17	3	3
Civic Centre	226	104	62	26	16
Market Place	34	62	55	5	2
Princess Mews	62	76	47	22	7
Priory Gardens	12	18	14	4	0
Lower Warren	19	28	16	7	5
Upper Warren	94	42	17	7	18

Table 2 – Duration of stay data for Royston town centre car parks for Saturdays.

It should be noted that the baseline data used for the forecasting of daily, monthly, and annual income is based on parking acts that start from 3pm onwards, whereas the parking data collected during the surveys commenced from 2pm. Consideration was given to including vehicles that were within the car park from 2pm, but this was rejected based on the difficulty in understanding both how long they had been within the car park, and how much money they had used for their parking session.

The data utilised to forecast the potential income is based on the parking surveys that were undertaken across Royston town centre car parking in June 2023. This is the only reliable data that can be used to forecast daily, monthly, and annual income. Whilst this is

the only reliable data, forecasting monthly, and particularly annual income should be caveated. The data is isolated across a two-week period in the months of June and July. Therefore, the data takes no consideration of seasonal fluctuations, meaning the robustness is limited.

However, the surveys were undertaken during a neutral period of the year (subject to perhaps a slight increase due to the summer months albeit outside of school holidays), which provides a solid baseline to project from. Whilst in reality the months of January-March would probably provide a lower demand, the months of August, and November-December would probably provide a higher demand.

To generate more robust data to use as a baseline for the forecasting task would require regular surveys each month, or more accurate parking ticket data. Currently this isn't possible as from 3pm car park visitors are not required to purchase a ticket, meaning surveys are the only accurate method to understand usage over days of the week.

In addition to the above, it should be noted that the parking survey data is representative of a Tuesday and Wednesday only across the weekday period. These days were chosen to provide a comparative between a non-market day in Royston (Tuesday), and a market day in Royston (Wednesday). Wednesday in particular is unlikely to provide a true reflection of weekday parking in the town centre due to the market day impacting parking, due to both a loss of parking (Market Place), and potentially attracting more visitors into the town.

Tuesday is more likely to provide a true representation of weekday parking behaviour. With that being said, it's likely that both Monday and Friday will provide different behaviours, especially since the Covid-19 pandemic. With the increase in working from home, and a four-day working week, there is emerging evidence (anecdotal at the moment, although this is likely to be confirmed with updates to traffic models) that Monday is a common work from home day, and Friday is becoming a more recreational day for visitors to town centres. There isn't likely to be much deviation between Tuesday and Thursday parking behaviours.

Based on this, the monthly, and annual income forecasts are useful for illustration purposes to demonstrate the potential income generation based on the scenarios utilised as part of this study, it should be noted that there is limited robustness to the data. If there

is a desire for more robust data to be collated to form part of a business case for the introduction of parking charges in Royston from 3pm, it is recommended that additional surveys are undertaken across town centre car parks. This should include both Mondays and Fridays, as well as within additional neutral months i.e. March, October etc. This should exclude any school holiday periods within this time.

5.2 OPTION 1 - 2023/2024 NORTH HERTFORDSHIRE TARIFF STRUCTURE 8AM - 6PM

The first scenario tested is to remove any concessions from the existing parking tariff for council managed car parks between 3pm and 6pm, resulting in the same tariff that operates currently between 8am and 3pm. This ranges from £0.80 to £5.00 based on the car park.

Table 2 below illustrates the potential income that can be generated in the seven Royston car parks if the above parking charge tariff was introduced. This includes two projections; a small income; and a larger income. The large income reduction considers the possibility of a noticeable reduction in usage in the car park as a result of the removal of the free from three initiative. This reduction has been calculated at 20%. It's highly unlikely the reduction would be this severe. The smaller income reduction assumes a less severe reduction in income due to new parking tariff changes, with the decrease assumed to be 10%.

Table 3 also provides the daily, monthly and annual financial projections based on option 1 with an assumption that there is no change in existing usage. This has been calculated using the baseline data provided above in table 1 and does not include for any considerations in increases or decreases based on economic stability, timing of implementation or resident buy in variables.

Car Park	Daily Income	Monthly Income	Annual Income	Projected Annual Income (Small)	Projected Annual Income (Large)
Angel Pavement	£38.10	£803.15	£9,639.30	£8,675.37	£7,711.44
Civic Centre	£125.70	£2,649.76	£31,802.10	£28,621.89	£25,441.68
Market Place	£74.00	£1,559.92	£18,722.00	£16,849.80	£14,977.60
Princess Mews	£90.40	£1,905.63	£22,871.20	£20,584.08	£18,296.96
Priory Gardens	£19.10	£402.63	£4,832.30	£4,349.07	£3,865.84
Lower Warren	£30.00	£632.40	£7,590.00	£6,831.00	£6,072.00
Upper Warren	£97.40	£2,053.19	£24,642.20	£22,177.98	£19,713.76
Total	**£474.70**	**£10,006.68**	**£120,099.10**	**£108,089.19**	**£96,079.28**

Table 3 – Potential income generated from car parks, on weekdays between 3pm-6pm option 1

Table 3 illustrates that based on option 1 there is an overall income generated per day from all car parks of £474.70 and a total monthly income of £10,006.68. In total the car parks based on this scenario would generate an annual revenue of £120,099.10.

Table 4 also provides the Saturday, daily, monthly and annual financial projections based on option 1 with an assumption that there is no change in existing usage. This has been calculated using the baseline data provided above in table 2 and does not include for any considerations in increases or decreases based on economic stability, timing of implementation or resident buy in variables.

Car Park	Daily Income	Monthly Income	Annual Income	Projected Annual Income (Small)	Projected Annual Income (Large)
Angel Pavement	£30.10	£130.33	£1,565.20	£1,408.68	£1,252.16
Civic Centre	£92.20	£399.23	£4,794.40	£4,314.96	£3,835.52
Market Place	£59.80	£258.93	£3,109.60	£2,798.64	£2,487.68
Princess Mews	£107.80	£466.77	£5,605.60	£5,045.04	£4,484.48
Priory Gardens	£17.60	£76.21	£915.20	£823.68	£732.16
Lower Warren	£32.10	£138.99	£1,669.20	£1,502.28	£1,335.36
Upper Warren	£57.60	£249.41	£2,995.20	£2,695.68	£2,396.16
Total	**£397.20**	**£1,719.88**	**£20,654.40**	**£18,588.96**	**£16,523.52**

Table 4 – Potential income generated from car parks, on Saturdays between 3pm-6pm option 1

Table 4 illustrates that based on option 1 there is an overall income generated per day from all car parks of £397.20 and a total monthly income of £1,719.88. In total the car parks based on this scenario would generate an annual revenue of £20,654.40

5.3 OPTION 2 - FLAT RATE OF £0.50 BETWEEN 3PM AND 6PM

The second option tested is to charge a flat rate parking charge of £0.50 between the hours of 3pm – 6pm, which would mean a flat rate of £0.50 is charged to any user wishing to park between these times regardless of the length of time they park.

Table 5 below illustrates the potential income that can be generated in the seven Royston car parks if the above parking charge tariff was introduced. Table 3 provides the daily, monthly and annual financial projections based on option 2 with an assumption that there is no change in existing usage. This has been calculated using the baseline data provided above in table 1 and does not include for any considerations in increases or decreases based on economic stability, timing of implementation or resident buy in variables.

Car Park	Daily Income	Monthly Income	Annual Income	Projected Annual Income (Small)	Projected Annual Income (Large)
Angel Pavement	£16.00	£337.28	£4,048.00	£3,643.20	£3,238.40
Civic Centre	£69.00	£1,454.52	£17,457.00	£15,711.30	£13,965.60
Market Place	£32.00	£674.56	£8,096.00	£8,096.00	£6,476.80
Princess Mews	£28.50	£600.78	£7,210.50	£6,489.45	£5,768.40
Priory Gardens	£9.00	£189.72	£2,277.00	£2,049.30	£1,821.60
Lower Warren	£12.50	£263.50	£3,162.50	£2,846.25	£2,530.00
Upper Warren	£41.50	£874.82	£10,499.50	£9,449.55	£8,399.60
Total	**£208.50**	**£4,395.18**	**£52,750.50**	**£48,285.05**	**£42,200.40**

Table 5 – Potential income generated from car parks, on weekdays between 3pm-6pm option 2

Table 5 illustrates that based on option 2 there is an overall income generated per weekday from all car parks of £208.50 and a total monthly income of £4,395.18. In total the car parks based on this scenario would generate an annual revenue of £52,750.50.

Table 6 below illustrates the potential income from Saturdays that can be generated in the seven Royston car parks if the above parking charge tariff was introduced. Table 6 provides the daily, monthly and annual financial projections based on option 2 with an assumption that there is no change in existing usage. This has been calculated using the baseline data provided above in table 1 and does not include for any considerations in

increases or decreases based on economic stability, timing of implementation or resident buy in variables.

Car Park	Daily Income	Monthly Income	Annual Income	Projected Annual Income (Small)	Projected Annual Income (Large)
Angel Pavement	£11.50	£49.80	£598.00	£538.20	£478.40
Civic Centre	£52.00	£225.16	£2,704.00	£2,433.60	£2,163.20
Market Place	£31.00	£134.23	£1,612.00	£1,450.80	£1,289.60
Princess Mews	£38.00	£164.54	£1,976.00	£1,976.00	£1,580.80
Priory Gardens	£9.00	£38.97	£468.00	£421.20	£374.40
Lower Warren	£14.00	£60.62	£728.00	£728.00	£582.40
Upper Warren	£21.00	£90.93	£1,092.00	£982.80	£873.60
Total	**£176.50**	**£764.25**	**£9,178.00**	**£8,530.60**	**£7,342.40**

Table 6 – Potential income generated from car parks between, on Saturdays 3pm-6pm option 2

Table 6 illustrates that based on option 2 there is an overall income generated per weekday from all car parks of £176.50 and a total monthly income of £764.25. In total the car parks based on this scenario would generate an annual revenue of £9,178.00.

5.4 OPTION 3 - FLAT RATE OF £0.80 BETWEEN 3PM AND 6PM

The third option tested is to charge a flat rate parking charge of £0.80 between the hours of 3pm – 6pm, which would mean a flat rate of £0.80 is charged to any user wishing to park between these times regardless of the length of time they park.

Table 7 below illustrates the potential income that can be generated on Saturdays in the seven Royston car parks if the above parking charge tariff was introduced. Table 7 provides the daily, monthly and annual financial projections based on option 3 with an assumption that there is no change in existing usage. This has been calculated using the baseline data provided above in table 1 and does not include for any considerations in increases or decreases based on economic stability, timing of implementation or resident buy in variables.

Car Park	Daily Income	Monthly Income	Annual Income	Projected Annual Income (Small)	Projected Annual Income (Large)
Angel Pavement	£25.60	£539.65	£6,476.80	£5,829.12	£5,181.44
Civic Centre	£110.40	£2,327.23	£27,931.20	£25,138.08	£22,344.96
Market Place	£51.20	£1,079.30	£12,953.60	£11,658.24	£10,362.88
Princess Mews	£45.60	£961.25	£11,536.80	£10,383.12	£9,229.44
Priory Gardens	£14.40	£303.55	£3,643.20	£3,278.88	£2,914.56
Lower Warren	£20.00	£421.60	£5,060.00	£4,554.00	£4,048.00
Upper Warren	£66.40	£1,399.71	£16,799.20	£15,119.28	£13,439.36
Total	**£333.60**	**£7,032.29**	**£84,400.80**	**£75,960.72**	**£67,520.64**

Table 7 – Potential income generated from car parks on weekdays between 3pm-6pm option 3

Table 7 illustrates that based on scenario 3 there is an overall income generated per day from all car parks of £333.60 and a total monthly income of £7,032.29. In total the car parks based on this scenario would generate an annual revenue of £84,400.80.

Table 8 below illustrates the potential income that can be generated on Saturdays in the seven Royston car parks if the above parking charge tariff was introduced. Table 8 provides the daily, monthly and annual financial projections based on option 3 with an assumption that there is no change in existing usage. This has been calculated using the baseline data provided above in table 1 and does not include for any considerations in

increases or decreases based on economic stability, timing of implementation or resident buy in variables.

Car Park	Daily Income	Monthly Income	Annual Income	Projected Annual Income (Small)	Projected Annual Income (Large)
Angel Pavement	£18.40	£79.67	£956.80	£861.12	£765.44
Civic Centre	£83.20	£360.26	£4,326.40	£3,893.76	£3,461.12
Market Place	£49.60	£214.77	£2,579.20	£2,321.28	£2,063.36
Princess Mews	£60.80	£263.26	£3,161.60	£2,845.44	£2,529.28
Priory Gardens	£15.20	£65.82	£790.40	£711.36	£632.32
Lower Warren	£22.40	£96.99	£1,164.80	£1,048.32	£931.84
Upper Warren	£33.60	£145.49	£1,747.20	£1,572.48	£1,397.76
Total	**£283.20**	**£1,226.26**	**£14,726.40**	**£13,253.76**	**£11,781.12**

Table 8 – Potential income generated from car parks on Saturdays between 3pm-6pm option 3

Table 8 illustrates that based on scenario 3 there is an overall income generated per day from all car parks of £283.20 and a total monthly income of £1,226.26. In total the car parks based on this scenario would generate an annual revenue of £14,726.40.

5.5 SUMMARY OF PARKING CHARGE SCENARIO TESTING

Three options have been considered as part of the car park charge scenario testing exercise in council managed car parks in Royston town centre. Option 1 involves extending the existing tariff that is in operation between 8am and 3pm through till 6pm, which results in removing the existing concession in place. Option 2 introduces a £0.50 flat rate charge that is required regardless of length of stay between 3pm and 6pm. Option 3 provides an alternative flat rate charge of £0.80 that is required between 3pm and 6pm.

Option 1 will generate the highest amount of income due to the higher tariff charges. If there was no reduction in occupancy rates with the introduction of the option 1 parking charge, an additional £120,099.10 would be generated each year across the seven car parks. It's assumed that introducing this parking tariff to cover the period between 3pm and 6pm would result in a reduction in parking demand. A 10% decrease in parking demand would reduce the annual income to £108,089.19. A 20% decrease in parking

demand would reduce the annual income to £96,079.28. Due to this option having the highest tariff in place, option 1 is the most likely option to demonstrate the highest percentage of reduction in parking demand.

Option 2 will generate the lowest amount of income as this is the lowest tariff charge under consideration from the three options. If there was no reduction in occupancy rates with the introduction of the option 2 parking charge, an additional £52,750.50 would be generated each year across the seven car parks. This is over 50% reduction compared to option 1. Although the tariff is minimal, there may still be a slight reduction in parking demand. A 10% decrease in parking demand would reduce the annual income to £48,285.05. A 20% reduction in parking demand would reduce the annual income to £42,200.40. Due to this option having the lowest tariff in place, option 2 is the most likely option to demonstrate little, if any change in parking demand.

Option 3 will generate an additional £84,400.80 if there was no reduction in occupancy rates with the introduction of the option 3 parking charge. There is a chance that there may still be a slight reduction in parking demand. A 10% decrease in parking demand would reduce the annual income to £75,960.72. A 20% reduction in parking demand would reduce the annual income to £67,520.64.

Table 9 provides a summary of the tariff options for weekdays only, and the expected income generation for each of the car parks within Royston town centre if parking charges were extended between 3pm and 6pm, or if there was no concession in place.

Table 10 provides a summary of the tariff options for Saturdays only, and the expected income generation for each of the car parks within Royston town centre if parking charges were extended between 3pm and 6pm, or if there was no concession in place.

Car Park	Option 1	Option 2	Option 3	Projected Annual Income O1 Large	Projected Annual Income O1 Small	Projected Annual Income O2 Large	Projected Annual Income O2 Small	Projected Annual Income O3 Large	Projected Annual Income O3 Small
Angel Pavement	0-1 Hours….0.80	0-1 Hours….0.50	0-1 Hours….0.80	£7,711.44	£8,675.37	£3,238.40	£3,643.20	£5,181.44	£5,829.12
	1-2 hours….1.60	1-2 hours….0.50	1-2 hours….0.80						
	2-3 Hours….3.90	2-3 Hours….0.50	2-3 Hours….0.80						
Civic Centre	0-1 Hours….0.80	0-1 Hours….0.50	0-1 Hours….0.80	£25,441.68	£28,621.89	£13,965.60	£15,711.30	£22,344.96	£25,138.08
	1-2 hours….0.90	1-2 hours….0.50	1-2 hours….0.80						
	2-3 Hours….1.20	2-3 Hours….0.50	2-3 Hours….0.80						
Market Place	0-1 Hours….0.80	0-1 Hours….0.50	0-1 Hours….0.80	£14,977.60	£16,849.80	£6,476.80	£8,096.00	£10,362.88	£11,658.24
	1-2 hours….1.60	1-2 hours….0.50	1-2 hours….0.80						
	2-3 Hours….3.90	2-3 Hours….0.50	2-3 Hours….0.80						
Princess Mews	0-1 Hours….0.80	0-1 Hours….0.50	0-1 Hours….0.80	£18,296.96	£20,584.08	£5,768.40	£6,489.45	£9,229.44	£10,383.12
	1-2 hours….1.60	1-2 hours….0.50	1-2 hours….0.80						
	2-3 Hours….5.00	2-3 Hours….0.50	2-3 Hours….0.80						
Priory Gardens	0-1 Hours….0.80	0-1 Hours….0.50	0-1 Hours….0.80	£3,865.84	£4,349.07	£1,821.60	£2,049.30	£2,914.56	£3,278.88
	1-2 hours….1.60	1-2 hours….0.50	1-2 hours….0.80						
	2-3 Hours….3.90	2-3 Hours….0.50	2-3 Hours….0.80						
Lower Warren	0-1 Hours….0.80	0-1 Hours….0.50	0-1 Hours….0.80	£6,072.00	£6,831.00	£2,530.00	£2,846.25	£4,048.00	£4,554.00
	1-2 hours….1.40	1-2 hours….0.50	1-2 hours….0.80						
	2-3 Hours….1.90	2-3 Hours….0.50	2-3 Hours….0.80						
Upper Warren	0-1 Hours….0.80	0-1 Hours….0.50	0-1 Hours….0.80	£19,713.76	£22,177.98	£8,399.60	£9,449.55	£13,439.36	£15,119.28
	1-2 hours….1.40	1-2 hours….0.50	1-2 hours….0.80						
	2-3 Hours….1.90	2-3 Hours….0.50	2-3 Hours….0.80						
TOTAL				**£96,079.28**	**£108,089.19**	**£42,200.40**	**£48,285.05**	**£67,520.64**	**£75,960.72**

Table 9 - Summary of income generation on weekdays for Royston town centre car parks

Car Park	Option 1	Option 2	Option 3	Projected Annual Income O1 Large	Projected Annual Income O1 Small	Projected Annual Income O2 Large	Projected Annual Income O2 Small	Projected Annual Income O3 Large	Projected Annual Income O3 Small
Angel Pavement	0-1 Hours….0.80	0-1 Hours….0.50	0-1 Hours….0.80	£1,252.16	£1,408.68	£478.40	£538.20	£765.44	£861.12
	1-2 hours….1.60	1-2 hours….0.50	1-2 hours….0.80						
	2-3 Hours….3.90	2-3 Hours….0.50	2-3 Hours….0.80						
Civic Centre	0-1 Hours….0.80	0-1 Hours….0.50	0-1 Hours….0.80	£3,835.52	£4,314.96	£2,163.20	£2,433.60	£3,461.12	£3,893.76
	1-2 hours….0.90	1-2 hours….0.50	1-2 hours….0.80						
	2-3 Hours….1.20	2-3 Hours….0.50	2-3 Hours….0.80						
Market Place	0-1 Hours….0.80	0-1 Hours….0.50	0-1 Hours….0.80	£2,487.68	£2,798.64	£1,289.60	£1,450.80	£2,063.36	£2,321.28
	1-2 hours….1.60	1-2 hours….0.50	1-2 hours….0.80						
	2-3 Hours….3.90	2-3 Hours….0.50	2-3 Hours….0.80						
Princess Mews	0-1 Hours….0.80	0-1 Hours….0.50	0-1 Hours….0.80	£4,484.48	£5,045.04	£1,580.80	£1,976.00	£2,529.28	£2,845.44
	1-2 hours….1.60	1-2 hours….0.50	1-2 hours….0.80						
	2-3 Hours….5.00	2-3 Hours….0.50	2-3 Hours….0.80						
Priory Gardens	0-1 Hours….0.80	0-1 Hours….0.50	0-1 Hours….0.80	£732.16	£823.68	£374.40	£421.20	£632.32	£711.36
	1-2 hours….1.60	1-2 hours….0.50	1-2 hours….0.80						
	2-3 Hours….3.90	2-3 Hours….0.50	2-3 Hours….0.80						
Lower Warren	0-1 Hours….0.80	0-1 Hours….0.50	0-1 Hours….0.80	£1,335.36	£1,502.28	£582.40	£728.00	£931.84	£1,048.32
	1-2 hours….1.40	1-2 hours….0.50	1-2 hours….0.80						
	2-3 Hours….1.90	2-3 Hours….0.50	2-3 Hours….0.80						
Upper Warren	0-1 Hours….0.80	0-1 Hours….0.50	0-1 Hours….0.80	£2,396.16	£2,695.68	£873.60	£982.80	£1,397.76	£1,572.48
	1-2 hours….1.40	1-2 hours….0.50	1-2 hours….0.80						
	2-3 Hours….1.90	2-3 Hours….0.50	2-3 Hours….0.80						
TOTAL				**£16,523.52**	**£18,588.96**	**£7,342.40**	**£8,530.60**	**£11,781.12**	**£13,253.76**

Table 10 - Summary of income generation on Saturdays for Royston town centre car parks

6.0 IMPACT OF POTENTIAL VARIABLES

It is paramount that within the projections certain variables are accounted for with the financial projections. If North Hertfordshire Council do wish to implement one of the above options within the council managed car parks in Royston, then numerous affecting factors need to be considered. These factors include:

Timing of implementation – The timing of parking implementation is likely to increase or decrease the above projections based on when the implementation is actioned. For example, if these parking charges were introduced at a period of high occupancy such as summer holidays or Christmas holidays than it would likely lead to an increase in projected income. Conversely, if the parking charges were introduced during a period of low occupancy such as early within the year, then it would likely lead to a decrease in the projected income in each of the town centre car parks.

Economic Stability – Due to there not being a forecast date for the possible implementation of new car parks charges within Royston between 3pm and 6pm if they occur at all, factors such as economic stability need to be featured within the overall projections. This is due to the unpredictability of inflation and possibility of economical increases or decreases within the period of this report and possible implementation.

Stakeholder response – It is difficult to forecast the reaction of stakeholders to new or modified parking charges, and especially the introduction of charges when there have been no charges between a specific period. In the experience of 2020 Consultancy there is likely to be some impact to turnover by the introduction of parking charges, yet in experience this is likely to only be felt between a period of 3-6 months.

Considering the above, it is fundamental that the financial projections shown in tables 3-8 above included a higher projected income, and lower projected income. It's not recommended to base any decisions on the financial projections alone, but to consider them in conjunction with all known factors. It is difficult to include a one boot fits all percentage increase/decrease in the standard projections as there are so many unknown variables such as the level of communication between council and residents of the proposed increases and the overall nature of residential satisfaction with parking overall.

7.0 CONCLUSIONS

The impact of car parking charging on town centre footfall is clearly a contentious topic. Much of the debate is rooted in the fact that car parking charging is a complex issue and one that is part of a mix of factors that affect the impact of car parking more generally, as well as the health of local economies at a more macro level. For example, issues around sustainability, town or city centre offering and location, and government and Local Authority budgets to name a few.

The literature review and primary research indicated that car parking charges are only one of a number of factors at play in influencing footfall and town centre vitality. It showed that organisations with agendas as diverse as the Federation for Small Businesses and Sustrans share the view that an integrated approach to transport policy is needed, and which is tailored to the needs of local economies. Overall, this research has indicated that the following parking related factors are important determinants of people's behaviour in relation to town centres.

- Availability of spaces;
- Restrictions on parking (i.e. how long people can park for);
- Proximity of parking to intended destination;
- Traffic flow;
- Signage;
- Overall retail offering;
- Out of town retail offering;
- Price of car parking;
- Security of car park;
- Incentives for parking.

These factors are subject to ongoing changes, making it difficult to determine the extent to which they are responsible for changes in behaviour. Car park charging should not be viewed in isolation from other factors (availability of parking, signage, traffic flow) which affect willingness to drive in town centres. An overall systemic approach could be taken to future research which examines this complex interplay, rather than one aspect of it.

Whilst there is not much existing quantitative evidence on the impact that car parking charging has on footfall, it is possible to identify clear examples, at least anecdotally, of

where charges have had either a positive or negative impact on footfall and business custom. For example, whilst a 'blanket' free parking strategy has been suggested to encourage more car park users, these were generally found not to benefit target visitors (for example town centre workers who were taking up the spaces all day, rather than shoppers) and consequently had a negative impact on footfall.

As the examples above suggest, the impact that similar charging strategies can have in different town or city centres emphasises the point that charging must be tailored to the demographic and retail/ business offering nuances of the local area, in order to optimise the positive impact that charging has on footfall and the overall health of the local economy. Remaining engaged with the key stakeholders involved in the local economy, for example business owners, shoppers, council members etc., is also key to ensuring the optimum charging strategies are adopted.

After reviewing the car parks across Royston, if option 1 was to be introduced there would be a greater decrease in car park use from residents initially as the charges are higher than option 2 and 3. Option 2 is likely to have the most amount of positive buy in from residents due to the small nominal fee, whereas subsequently option 3 would have slightly less buy in from residents due to the increase in cost over option 2. It is likely that the residential support for parking charges would increase once the increase in revenue is subsequently used to improve all car parks across Royston.

Of the three potential parking charge tariff structures considered as part of this study, all options have benefits and drawbacks. It is for the council officers, and elected members to make the decision on the option progressed, if parking charges are introduced in Royston between 3pm-6pm. As highlighted in chapter 5, the income generated differs based on the option. As expected, the greater the income generated, the higher the tariff costs, which may have a negative impact on local economies.

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