Appendix D

Denbighshire Town Centre Parking & Traffic

Scoping Report

February 2014

Denbighshire County Council

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1. Introduction

1.1 Study Background

One of the Denbighshire County Council's Corporate Priorities is to support local businesses and, in order to deliver on this priority, the Council has developed an Economic Ambition Strategy. One of the elements of this strategy is to undertake a Parking & Traffic Management (P&TM) Review of Denbighshire's town centres in order to identify whether and how these aspects could be improved to better support town centre business activity.

The purpose of this study is therefore to present a range of costed options for how the P&TM Review could be taken forward in order to allow the Council to identify:

- The outcomes required from the review
- The funding required to deliver these outcomes

1.2 Study Approach

The approach of this study is as follows:

1. We have undertaken a document-review of relevant publicly-available studies, guidance and articles in order to present a summary of the existing evidence-base and thinking concerning the relationship between town centre parking / traffic-management and trade levels. This is summarised in Section 2.
2. Based on the findings of the document-review, our proposed outline Review methodology is presented in Section 3. This recommends a combination of social research and count survey data collection methods.
3. Sections 4 and 5 respectively present different options for undertaking social research and count survey data collection, taking into account outline costs and the strengths and weaknesses of the different methods.
4. Once the data collection and processing stage is completed, any parking and traffic management problems affecting trade in Denbighshire's town centres will have been identified. Section 6 therefore presents outline costs for the solution development stage of the Review.
5. Lastly, the above data is summarised in Section 7 to present main options for proceeding with the Review

2. Document Review

2.1 Introduction

The purpose of this section is to present a review of relevant publicly available documentation concerning links between parking / traffic management and town centre trade in order to set the evidence-base context for the study.

2.2 Bibliography

We have reviewed a number of documents as part of this exercise, but the most relevant for this study are as follows:

Academic Research

- Cruising for Parking, Donald C Shoup, University of California, 2006
- Parking Measures and Policies Research Review, TRL, 2010

Guidance

- Delivering Retal-Led Renaissance, BCSC, 2004
- Healthcheck for High Streets, Department fro Business Innovation & Skills, 2010

Policy Development

- The Portas Review, Mary Portas, 2011
- BPA Response to the Portas Review, 2012
- The Government's Response to the Mary Portas Review, Communities and Local Government, 2012
- Supporting High Streets and Town Centres, Communities and Local Government, 2013

Non-Academic Research

- Market Towns Car Parking Research, Yorkshire Forward, 2007
- Regeneration of Town Centres, National Assembly for Wales, 2012
- Spaced Out – Perspectives on Parking Policy, RAC Foundation, 2012
- The Relevance of Parking in the Success of Urban Centres, London Councils, 2012
- The Pedestrian Pound, Living Streets, 2013
- Re-Think! Parking on the High Street, ATCM, 2013

News Articles

- Holywell parking charge removal, The Leader, 2012 – 2013
- Free parking fails in Brighton and Hove, The Argus, 2013

A summary of relevant points arising from each document is provided in the following subsections. Conclusions arising from this review are provided at the end of this section.

2.3 Academic Research Documents

2.3.1 Cruising for Parking, Donald C Shoup, University of California, 2006

2.3.1.1 Summary of Relevant Points

This document describes research into the impact of on-street parking charging on parking search traffic. The main finding of the report is that on-street parking which is charged below the market rate and below the rate of off-street alternatives results in demand exceeding supply which, in turn, results in potentially significant levels of traffic circulating in order to search for a free space. A range of research is quoted as suggesting that this search traffic can comprise between 8% and 74% of general traffic volumes. Conversely, therefore, the author suggests that this traffic can be eliminated by charging on-street parking at the market rate and at least equal to the rate of off-street alternatives.

2.3.1.2 Application to P&TM Review

Increased traffic levels within town centre shopping areas can impact on the shopping experience for pedestrians. Parking search traffic in these areas should therefore be minimised. Consideration should therefore be given by the Review to the absolute and comparative rate for on-street parking charging in Denbighshire's towns.

2.3.2 Parking Measures and Policies Research Review, TRL, 2010

2.3.2.1 Summary of Relevant Points

This document presents findings of a project to investigate:

> "*the evidence about the impact of different types of parking measures and policies on road traffic, congestion and transport safety, car ownership, on the level of carbon emissions from transport, on the activity of businesses, and on townscapes. The focus was mainly though not wholly, on urban areas. It has involved a Systematic Review of evidence from original and relevant studies."*

This document is relevant to the Review in as much as it confirms that (at least in 2010) there is little quantitative evidence of the true costs and market value of parking or its impact on the town centre economy.

2.3.2.2 Application to P&TM Review

The lack of existing evidence base on the link between parking and the town centre economy supports the need for the Review to include a strong data gathering element.

2.4 Guidance Documents

2.4.1 Delivering Retail-Led Renaissance, BCSC, 2004

2.4.1.1 Summary of Relevant Points

This document presents a commercial/retail sector perspective on what is required to help regenerate town centres; particularly in smaller towns. With respect to parking, the document states:

"Hand-in-hand with good quality public transport is the need for adequate, convenient, high quality and preferably free parking. This requirement came through repeatedly during the research, and is viewed currently as a major competitive disadvantage of towns and smaller city centres when compared with out of town developments. Local authorities should think carefully about the revenue generated by parking and balance this against the possible increases in revenue if a town centre and its catchment are given the opportunity to thrive."

The request for free parking is common from traders, especially to compete with out-of-town shopping centres, but other documents covered below argue that this does not provide the benefits expected. However, the point about the link between town centre parking revenue and business rate revenue is worth considering.

2.4.1.2 Application to P&TM Review

Role of town centre parking revenue needs to be considered in the context of supporting local businesses.

2.4.2 Healthcheck for High Streets, Department for Business Innovation & Skills, 2010

2.4.2.1 Summary of Relevant Points

This report provides a useful and practical means of assessing the health of a High Street and suggests a range of issues to consider in order to make improvements. Report serves as a useful reminder that the attractiveness of a High Street is not just about the quantity and cost of car parking but also the:

- Quality and proximity of public transport access
- Quality of public realm and pedestrian routes, both visually and for movement
- Provision for mobility impaired
- Quality and location of car parking

2.4.2.2 Application to P&TM Review

As well as parking and traffic management issues, the Review should also include consideration of the above issues.

2.5 Policy Development

2.5.1 The Portas Review, Mary Portas, 2011

2.5.1.1 Summary of Relevant Points

The Portas Review was commissioned by the Government in response to concerns that the UK's high streets are in decline and face an increasingly uncertain future. The purpose of the commission was for Mary Portas to recommend measures to be pursued by the Government to help reinvigorate our high streets.

The report notes that the high street's main competition comes from out-of-town shopping centres and online shopping, such that total consumer spend away from high streets is now over 50%. In order to help the high street compete, the report makes the following parking / access related recommendations:

1. Local areas should implement free controlled parking schemes
   - The report suggests that high street parking charging, enforcement and fines are more focussed on raising revenue than they are on supporting the high street.
   - The report therefore suggests providing shopper-friendly tariffs such as ‘Free After Three’ or limits to maximum stay to deter commuters. Anecdotal evidence from Swindon is quoted which suggests that such measures have resulted in better trading conditions.
   - The report also recommends providing parking league table to allow users to choose car parks based on cost.
2. Town Teams should focus on making high streets accessible, attractive and safe.
   - The report makes the valid point that *out-of-town centres create an environment where the shopper comes first, with wide footways and pedestrianised streets*. High streets, by contrast, are more likely to offer cluttered, narrow pavements, as well as busy roads.

2.5.1.2 Application to P&TM Review

This report reinforces the points already noted above that the role of parking charging should be considered in terms of its relationship to promoting town centre trade and that the Review should consider public realm issues as well as just parking and traffic management.

2.5.2 BPA Response to the Portas Review, 2012

In their response to the Portas Review, the British Parking Association mainly challenge the points raised regarding the recommendations for free parking and for producing a parking charge league table. Their main points are that:

- There is no such thing as free parking.
  - Someone has to pay for it.
  - Evidence exists (hospitals in Wales and Scotland cited) that shows how free parking can harm shopper interests because more spaces tend to get occupied by long-stay commuters.
  - For parking to work effectively, therefore, enforcement is required and this costs money.
- A parking charge league table is unhelpful in that car park users are not solely influenced by price.
  - They also take account of quality, convenience, safety and accessibility.
  - People are prepared to pay for good customer service and quality parking facilities.
- Free or inexpensive parking can reduce availability and increase searching traffic (where demand exceeds supply).
  - Increased search traffic reduces appeal of town centre

2.5.2.1 Application to P&TM Review

Free and unregulated parking within a town centre environment where there are competing uses is clearly not in the town centre’s best interests. In such cases, commuters tend to benefit most and shoppers and visitors least. However, charging is not the only means of regulating parking and hence, again, this question as to the function of parking charging needs to be considered within the Review.

2.5.3 The Government's Response to the Mary Portas Review, Communities and Local Government, 2012

2.5.3.1 Summary of Relevant Points

In response to the Portas Review, this document states that the Government agrees that "*parking charges can have a real impact on the success of the high street"* and that local authorities should "*look closely at their parking provisions and charges, ensuring they deliver the best outcomes locally."*

With respect to parking, the document states that the Government have already:

- *"removed Whitehall restrictions imposing maximum numbers of parking places in new residential developments;*
- *removed the policy of setting charges to discourage the use of cars;*
- *introduced a policy that parking enforcement should be proportionate;*
- *changed a policy inhibiting competition between council areas to one which says parking charges should not undermine the vitality of town centres*."

This policy shift returns a clear presumption in favour of the car for town centre shopping uses.

2.5.3.2 Application to P&TM Review

Again, the Review needs to consider parking charges, regulation and enforcement within the context of what is required to best support local trade.

2.5.4 Supporting High Streets and Town Centres, Communities and Local Government, 2013

2.5.4.1 Summary of Relevant Points

Following on from the Government's response to the Portas Review, this document sets out the Government's proposed measures to improve the competitiveness of the UK's town centres. With respect to town centre parking, the document proposes to moderate town centre parking enforcement by:

- Stopping CCTV being used for on-street parking enforcement
- Introducing a right for communities and businesses to require authorities to review their parking strategies, including the level of parking charges, location of yellow lines etc
- Legislating to allow "grace periods" before penalties are issued for minor contraventions
- Allowing the parking adjudicator to grant appeals where councils have not followed guidance, and highlighting that adjudicators can award costs where appeals are won
- Removing disincentives for appeals, by allowing a 25% discount for prompt payment after the appeal if the fine is still payable
- Freezing parking penalty charges for the remainder of this Parliament

The document also promises to: *"update parking enforcement guidance to mirror the pro-high street policies reflected in the National Planning Policy Framework. This will advocate a less heavy-handed approach to parking enforcement and reinforce that parking charges and fines should not be used to subsidise other areas of local government spending.*" This document is reviewed below (see Section 2.6.6 below).

2.5.4.2 Application to P&TM Review

This document establishes as policy the Government's position that town centre parking charging, regulation and enforcement must be set at a level that promotes local trade and not the raising of local government revenue. This policy context should be taken into account by the Review.

2.6 Non-Academic Research

2.6.1 Market Towns Car Parking Research, Yorkshire Forward, 2007

2.6.1.1 Summary of Relevant Points

This report was commissioned by Yorkshire Forward in order to identify how parking can help or hinder the regeneration of Yorkshire market towns. The document makes many useful and relevant points, as follows:

- *"The relationship between parking and economic performance is weak, but generally positive"*:
  - *"Many people fear that making changes to the way that parking is managed will adversely affect the town's economy. There is little evidence of such a relationship one way or the other. However, the limited evidence which does exist suggests that it is the town's broader retail, commercial, leisure and/or tourism offer which is the primary factor affecting a town's competitiveness, not the provision of parking. So, if a town has a good retail offer, it will continue to attract customers, despite having poor parking facilities; in contrast, a town with very good parking facilities, but a limited retail offer, will struggle to attract customers. However, all other things being equal, parking will clearly have an effect."*
- *"Better management of parking can enhance public spaces, making towns more attractive to visitors, thereby improving their economic viability"*
- *"In order to manage parking effectively, you must first understand your town's needs:*
  - *It is important to understand the nature of your town and the travel behaviour of the town's users before making changes to the way in which parking is managed. Some of the key features of your town which you need to consider are:*
    - *the size, nature and location of the employment, retail and visitor sectors;*
    - *the socio-demographics of your town's residents and visitors;*
    - *the strength and vitality of the retail sector; and*
    - *the nature and proximity of competing settlements.*
  - *You also need to consider who uses your town and why, including:*
    - *the relative importance to the town's economy of workers, shoppers, visitors and residents;*
    - *the parking behaviour of each segment;*
    - *the factors which influence when and how often each visit the town; and*
    - *the attributes of the town and parking they value most (such as convenience, reliability, security and cost)."*
- Restrictions should be enforced effectively:
  - *"Informal surveys in a number of Renaissance Market Towns suggest that typically between 20%-40% of central short-stay parking spaces are being used by long-stay visitors."*
  - *"It is important that on-street and off-street parking is managed as one."*

- *"Parking is not usually the primary factor in a town's competitiveness"*:
  - *"The primary factors in terms of retail choice tend to include:*
    - *The quality or uniqueness of the non-food shopping 'offer' and the attractiveness of the local environment;*
    - *The scale of the retail offer; and*
    - *The quality scale and proximity of the retail offer in competing settlements.*
  - *A town with nearby competitors with a similar, or better, retail offer will be far more vulnerable to losing custom if it changes its parking management than a town which is either remote from its competitors or which offers a better product."*
- *"Impacts of parking management depend on the status of the town and parking supply"*:
  - *"There appears to be no evidence to link retail performance to parking tariffs or length of stay restrictions"*
  - *"If parking is free or cheap, people may stay longer, reducing car parking availability, and thereby deterring other shoppers from visiting that town centre."*
  - *"A town with inadequate levels of parking leading to shoppers being unable to find parking spaces could benefit from charging; whilst a town with no parking shortage might lose out from introducing charges."*
- Responses to parking charges:
  - *"Generally comparison shopping is more susceptible than convenience shopping."*
- Relationship between mode and spend:
  - *"Car drivers do spend more per visit but other modes visit more often and therefore spend similar amounts overall.*
  - *Other modes are (presumably) more captive to their local service centre."*

The document also provides useful data on the different parking requirements of town centre users and the range of parking solutions that could be considered to resolve parking problems in town centres.

2.6.1.2 Application to P&TM Review

This very useful report is of relevance to the Review as follows:

- It confirms that a certain degree of parking management is positive for supporting town centre trade, by prioritising supply to suit conflicting demands. Appropriate management of parking can also improve the town centre environment and appeal. The degree of parking management, however, depends on the quality of the retail offer and the current balance of parking supply and demand.
- On the same note, the report confirms that parking is not usually the primary factor in a town's competitiveness, despite the common converse perception of traders. This therefore underlines the importance of discovering what the primary concerns are of each town's potential consumer market.
- The report also confirms that the car is not the only mode of importance in serving a town's shopping needs. The study should therefore take into account the use and perception of the potential market of non-car modes for accessing each town.

The Review should therefore include for as comprehensive an interview data collection exercise as possible concerning the preferences of each town's potential consumer market.

2.6.2 Regeneration of Town Centres, National Assembly for Wales, 2012

2.6.2.1 Summary of Relevant Points

This report was prepared for the Welsh Assembly by the Enterprise and Business Committee in order to make recommendations on how the Welsh Government can promote the regeneration of town centres in Wales. The relevant recommendations are that the Welsh Government should:

- Protect town centres from the potential impacts of out-of-town retail developments
- Encourage office and work-place development as a means to increase footfall within town centres
- Provide clear guidance to local authorities to ensure that transport intergation is a core element of all town centre regeneration and redevelopment plans

With respect to the role of car parking in regenerating town centres, the report observes that conflicting views prevail. Traders generally argue that more and cheap car parking is required to attract trade, whereas the argument of groups like Sustrans is that such a measure is counter-productive as it increases traffic and congestion and reduces the attractiveness of essential non-car modes, including walking. The study also acknowledges that significant sectors of the population do not have a car. In light of this, the report recognises that:

> *"there is a need to fully understand theimpact of sustainable transport approaches on the vitality of town cntres in Wales and to provide an evidence base for future programmes."*

2.6.2.2 Application to P&TM Review

In light of this document, the Review needs to consider:

- The impact that people's workplaces have on their choice of shopping location
- Their preferred choice of mode for accessing town centres and the impact of parking on this choice

This therefore confirms that the Review should include a social research survey of the preferences the potential consumer market for each town.

It is also noted that such a Review would contribute to the evidence base required to better understand how transport provision relates to town centre regeneration in Wales. This could therefore make the study eligible to attract some Welsh Government funding.

2.6.3 Spaced Out – Perspectives on Parking Policy, RAC Foundation, 2012

2.6.3.1 Summary of Relevant Points

This report was commissioned by the RAC Foundation in order to contribute to the debate about local authority parking policy. It generally argues for consistency in the way that parking is regulated and how that is communicated to the driver and it supports the notion that parking is a service which it is fair to charge for.

With respect to the link between parking charges and trade, the report notes:

"Although research in Germany and Norway suggests that short periods of free parking in shopping areas to allow motorists to make quick purchases does not increase shop takings or reduce illegal parking, it is perceived to be a positive move by motorists, shopkeepers and local authorities.

There is also the issue of free parking in most out-of-town shopping centres, which distorts the market and penalises shops in town centres, where parking is generally charged. Certainly the view in the USA is that free parking, both on-street and in shopping centres, is undesirable as it does not reflect the true cost of supplying the parking service, and that parking in these areas should therefore be charged for. There is no reason why the same principle should not apply in the UK."

2.6.3.2 Application to P&TM Review

This Review provides background support for the economic sense in regulating parking through pricing mechanisms.

2.6.4 The Relevance of Parking in the Success of Urban Centres, London Councils, 2012

2.6.4.1 Summary of Relevant Points

This study was commissioned by London Councils to carry out a review of the relevance of parking in the success of urban centres. The study largely involved a literature review. This confirmed that there is *"relatively little research carried out into the link between parking and urban centre success."* Where there was research, however, the main findings were as follows:

- *"**More parking does not necessarily mean greater commercial success**. A well managed parking scheme, where spaces 'turn over' frequently can help to increase the number of visitors coming to a town centre and thereby help business.*
- ***There is no such thing as 'free' parking**. The costs of developing and maintaining parking spaces and then enforcing proper use to ensure good traffic flow have to be borne by somebody. In the case of local authority operated parking (on street or off street) any costs that are not covered by parking revenue falls to local Council Tax payers.*
- ***Shopkeepers consistently overestimate the share of their customers coming by car**. In some cases, this is by a factor of as much as 400%. In London, as well as other cities, the share of those accessing urban centres on foot or by public transport is much greater. Walking is the most important mode for accessing local town centres; public transport is the most important mode for travel to international centres, such as Oxford Street.*
- ***Car drivers spend more on a single trip; walkers and bus users spend more over a week or a month**. In 2011, in London town centres, walkers spent £147 more per month than those travelling by car. Compared with 2004, spending by public transport users and walkers has risen; spending by car users and cyclists has decreased.*
- ***A good mix of shops and services and a quality environment are some of the most important factors in attracting visitors to town centres**. If both these are poor, then changes to parking or accessibility are very unlikely to make a town centre more attractive."*

This report therefore confirms the findings presented by other documents reviewed above.

2.6.4.2 Application to P&TM Review

As for previous documents, this report is relevant to the Review in confirming the following:

- Parking that is regulated and well managed is positive for town centre economies
- Well managed parking comes at a cost, so it needs to be determined who should bear this cost and why
- An over-focus on parking can ignore the fact that many shoppers use non-car modes and that parking is rarely the dominant factor in attracting visitors to town centres

2.6.5 The Pedestrian Pound, Living Streets, 2013

2.6.5.1 Summary of Relevant Points

This report was commissioned by Living Streets in order to make the case for investment in walking-friendly public spaces. The report has a particular focus on the high street.

The overall message of the report is that attractive public realm is more likely to attract shoppers and visitors to a town than is cheap and plentiful car parking. Specific relevant points raised are:

- *"Case study evidence suggests that well-planned improvements to these public spaces can boost footfall and trading by up to 40%.*
- *Investing in better streets and spaces for walking can provide a competitive return compared to other transport projects; walking and cycling projects can increase retails sales by 30%.*
- *It is often assumed that more parking is the answer to struggling high streets. However across Europe, studies have linked the quality of public spaces to people's perceptions of attractiveness of an area, contributing towards their quality of life and influencing where they shop.*
- *Pedestrianisation has also been blamed for falling sales, ignoring the many contributing factors. Contrary to this claim, there is consistent evidence that customers like pedestrian environments and dislike traffic.*
- *Retailers have been shown to over-estimate the importance of the car for customer travel. In these studies, more people actually walked, cycled or came by bus.*
- *Case study evidence suggests that restricting traffic does not necessarily reduce the number of customers. In fact, charging road users and ring-fencing the revenue for public realm investment could also enhance business performance in the long run.*
- *The way we shop has changed and so have our expectations of the high street. Shoppers now seek to 'experience' something different and we need to know more about how better streets can add to that experience."*

2.6.5.2 Application to P&TM Review

The Review should consider the quality of town centre public realm, and the impact of parking on this, as a factor in what influences consumer destination choices.

2.6.6 Re-Think! Parking on the High Street, ATCM, 2013

2.6.6.1 Summary of Relevant Points

This study was undertaken by the Association of Town and City Management to provide more of an evidence base to support recent Government policy changes towards cars and town centres (see Section 2.5.4 above).

The study compared off-street parking capacities and tariffs in around 90 locations across the UK with footfall data. This analysis produced the following findings:

- *"Parking operators are providing parking provision which equates to the footfall levels achieved by their location.*
- *There is no clear relationship between car parking charges (set by parking owners/operators) and the amenities on offer in a location with some mid-range and smaller centres charging more than what is consistent with the national average.*
- *The mid-range and smaller groupings of centres that charge more than the national average in accordance with their offer, suffered a higher than average decline in footfall for 2011."*

The analysis did not provide conclusive evidence of a link between tariff and trade. However, the report provides a useful reminder that the role of town centre parking and who pays for it is important for local authorities to determine and implement consistently and effectively.

2.6.6.2 Application to P&TM Review

This report reinforces the need to review whose needs town centre parking is best serving.

2.7 News Articles

2.7.1 Holywell Parking Charge Removal

2.7.1.1 Summary of Relevant Points

Online articles tell the recent story of the impact of removing parking charges in Holywell town centre.

The first article in February 2012[1] documents how community leaders called for parking charges to be abolished in order to help attract more trade back to the town.

The next article in March 2013[2] describes how the Council had decided to reverse their proposal to expand parking charges in the county and to abolish them instead, in a response to strong local opposition.

The third article in November 2013[3], however, describes how local businesses and shoppers are now complaining that the removal of the parking charges is *"one of th eworst decisions made"* for the town. The

[1] http://leaderlive.co.uk/news/110648/get-rid-of-flintshire-parking-charges-right-now.aspx
[2] http://www.leaderlive.co.uk/news/120516/flintshire-council-axes-car-parking-charges-plan.aspx
[3] http://www.leaderlive.co.uk/news/128648/scrapping-charges-has-been-final-nail-for-holywell.aspx

impact cited is that town centre spaces are now occupied by long stay commuters so that shoppers are unable to find a space.

2.7.1.2 Application to P&TM Review

These articles provide a real world illustration of how a degree of parking regulation is actually beneficial for town centre trade.

2.7.2 Free Parking in Brighton and Hove

2.7.2.1 Summary of Relevant Points

An article in The Argus on 27th December 2013[4] describes how:

> *"Council bosses claim the city's free festive parking cost taxpayers thousands of pounds – yet few took advantage of the scheme.*
>
> *Shoppers in Brighton and Hove were treated to free parking at five council-owned car parks on the weekends of December 7 and 8, 14 and 15 and Sunday, December 23.*
>
> *The decision followed a city council meeting in November, where local traders and campaigners said the move would boost business.*
>
> *But town hall chiefs now say the move attracted just 206 extra vehicles in the first two weekends and lost taxpayers at least £32,000 in takings."*

On the other hand, shops were reported to have traded well over the same period, but the Council leader stated that this was *"more likely to be because of decent bus services as they have more passengers than ever."*

2.7.2.2 Application to P&TM Review

Again, this real world example illustrates how free parking is not necessarily beneficial to town centre trade and also alludes to the importance of the bus for shopping trips.

2.8 Summary and Application

The purpose of the proposed Review for Denbighshire's town centres is to identify parking and traffic management changes which could potentially be made to better support town centre trade.

However, this aim needs to be set within the context of the main strong message emerging from this document review which is that **parking is rarely the dominant factor in determining the destination choices of workers, shoppers or visitors**. This is because factors such as workplace location, the quality and variety of the retail offer and the quality of the public realm are likely to be more important in determining destination choice. It is also because more shoppers travel by non-car modes than is generally perceived, whilst many also have no access to a car at all.

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[4] http://www.theargus.co.uk/news/10901329.Free_parking_fails_to_pull_crowds_says_council/

It is therefore important that the Review be led by a social research survey of each town's catchment area in order to understand the needs and desires of each town's potential market. This will identify those factors which are important in determining the destination choices of potential workers and shoppers so that the extent to which these are being met by Denbighshire's town centres can be identified. Parking and traffic management are likely to be amongst these factors, but not necessarily as high a priority as might be expected. Based on such an analysis, potential solutions for attracting more trade can then be investigated.

3. Proposed Review Outline Approach

3.1 Introduction

The purpose of this section is to summarise the recommended outline approach for delivering the proposed Review.

3.2 Outline Approach

As described in Section 1.1 above, the purpose of a Parking and Traffic Management Review of Denbighshire's town centres is to identify whether and how these aspects could be improved to better support town centre business activity.

However, based on the above document review, it is noted that parking and traffic management issues are just two of a range of factors which influence local workers and shoppers' choice of destination.

It is therefore recommended that the P&TM Review proceed as follows:

1. Social research survey(s) of actual and potential workers/shoppers for each of Denbighshire's town centres, as well as a representation of local businesses, focussing on main factors influencing destination choice
2. Parallel data collection exercise to collate existing parking and traffic management supply details
3. Bespoke data collection surveys to understand existing parking and traffic management performance details, depending on issues raised by social research results
4. Development of appropriate solutions, based on constraints and opportunities identified by social research and data collection exercises

Options, outline costs and timescales for delivering each of these stages are presented in the following sections.

3.3 Definition of Town Centres

For the purposes of this Review and as instructed by the client, the town centres to be considered are:

- Rhyl
- Prestatyn
- Rhuddlan
- Dyserth
- Meliden
- St Asaph
- Denbigh
- Ruthin
- Corwen
- Llangollen

4. Social Research Survey Options

4.1 Introduction

The purpose of this section is to describe the different options available for completing social research surveys of each town centre's catchment population and of each town centre business community. Outline survey costs and timescales for each method are presented at the end of the section.

4.2 Existing Data

In terms of surveys of Denbighshire's residential population, we are aware of a Residents Survey conducted by the Council's Business Improvement and Modernisation team in 2013. The survey collected views from across the County concerning the satisfaction of residents with Council services. It was conducted mainly through postal and online questionnaires and resulted in over 2,000 returns. One of the topics in the questionnaire was about satisfaction with town centres, including parking.

This dataset will certainly be useful for the P&TM Review as supplementary evidence. However, it is considered that a further social research exercise will still be necessary in order to understand the role of parking and traffic management within the context of serving the area's employment and retail needs.

4.3 Catchment Population Quantitative Surveys

Each town centre is surrounded by a catchment population of potential workers/shoppers/visitors based on a reasonable travel distance. This represents each town centre's potential market.

The ideal quantitative survey of this market would be one that is able to draw on a survey sample which is random enough and large enough to provide representative results at an economical price. We therefore consider three methods below for potentially achieving this, as follows:

1. Telephone interviews
2. Postal surveys
3. Face to face interviews

4.3.1 Sample Size

The review needs to target actual customers of each town centre as well as potential customers. To reach customers, we recommend defining catchment areas around each town centre to include populations in more rural and distant areas as these groups would be making conscious decisions on which town to access, when to access those towns, for what purposes and using which specific modes of transport. Catchment areas have not been defined in this document but would need to be defined at inception stage to ensure a good representation of the target population.

Sample sizes for the surveys/interviews (options 1 to 3) would be different for each town centre and we would aim to reach a final town centre sample that allows for a large enough split of actual and potential customers within that town centre catchment area.

We suggest that the minimum overall sample of 2,000 is achieved which would allow for a maximum (i.e. worst case with a 50% finding) +/- 2% variance at the 95% confidence level at County level. This is based on the assumption that individual respondents will represent the views of their respective households. Our costs are based on achieving a final sample of 2,000. Any bigger sample size would have additional costs and would need to be considered at inception stage.

The following table shows confidence intervals for different sample sizes for a view held by 50% of the population. This shows the robustness of any data collected and the degree of confidence in the survey data when making conclusions based on the final sample overall and when broken down by town centre or other customer segments (such as mode of transport used, employment status, frequency of town centre use etc).

Table 4.1: Confidence intervals by sample size

Sample Size	Confidence Intervals (95%) 50% Viewpoint %
100	9.8
150	8.0
200	6.9
250	6.2
300	5.6
400	4.9
500	4.3
600	4.0
900	3.3
1,000	3.0
1,200	2.8
1,500	2.5
2,000	2.1

4.3.2 Questionnaire Scope

We anticipate that the following broad areas would be covered by the questionnaire:

- Customers' (actual and potential) shopping behaviour (online/offline, frequency of trips, shops preferred and why, money spent, travel mode used etc.)
- Factors affecting destination choices
- Reasons behind destination choices
- Barriers (perceived or real) for destination choices
- Importance of traffic and parking issues in determining destination choices
- Importance of traffic and parking issues in determining mode of transport used
- Improvements needed to encourage customers to use town centre
- Likelihood/frequency of using town centre if changes are made

Any questionnaire would need to be developed in close liaison with the Council and would need to adhere to the Market Research Society's Code of Conduct.

4.3.3 Survey Method Options

4.3.3.1 Option 1: Telephone interviews with actual/potential customers

Given the nature of the population we are sampling (actual and potential customers to each town centre), we recommend that Computer Assisted Telephone Interview (CATI) surveys are the most appropriate method. Using this method, telephone interviews would be conducted with a randomly selected sample of residents from each of the town centre's catchment area.

The advantage of telephone surveys in this case is that it offers the most appropriate method for a consistent and valid methodology. A representative sample can be obtained with no travelling costs involved. A large number of interviews can be obtained in a short period of time. The benefits of CATI over any other pen and paper approach are also clear: much-improved data quality due to built-in edits and the accurate delivery of questionnaires of considerable complexity due to programmed routing.

However, with telephone interviews, questionnaires can be no longer than 8-10 minutes as any longer would deter potential respondents. Costs can also be higher with telephone interview surveys.

Using CATI, potential respondents would be randomly selected by interviewers from a list of residents in the catchment area (the sample frame) and asked to take part in the survey. Telephone numbers can be purchased from and matched to the Post Office small users address file (PAF). Quotas would be set to ensure that a representative sample of residents is obtained from within the catchment area.

Pros: Most **r**epresentative sample achieved, accurate data collection, short timescale

Cons: Interview length limited, relatively expensive

4.3.3.2 Option 2: Postal surveys with actual/potential customers

As an alternative to telephone surveys, it would be possible to use postal surveys. This is the least expensive method and more information can be captured; however, research has shown that response rates to this method are typically low (around 10% even with reminders) and, as they are self-completion, quality is also generally low (included missing data and no opportunities to probe response) and the sample subject to self-selection bias. While it would be possible to send out a very large sample quickly and at low cost, keeping track of responses can be difficult and so data is likely to be less representative.

Postal surveys also have the added disadvantage of needing a long period of fieldwork to allow for questionnaires to be sent out, reminders to be sent out, completed questionnaires to be posted back and any follow-ups to be undertaken.

To achieve a minimum sample of around 2,000, questionnaires would need to be sent out to a minimum of 20,000 residents. Addresses to be included for each town centre's sample would be drawn randomly from the Post Office small users address file (PAF). Using this methodology and this approach, however, would still not guarantee a representative sample of residents in the catchment area.

After the initial mail-out to all 20,000 households, it is good practice to mail out a subsequent reminder. The costs below include for also providing the questionnaire again in the reminder mail out as this would increase response rate. We recommend the provision of a prize draw to maximise response rates and our costs include a prize up to the value of £150 (for example a high street voucher). All mailings would also include reply-paid envelopes for the return of completed questionnaires.

Alongside the questionnaire, a covering letter from Denbighshire County Council would be mailed out. The letter would explain the purpose of the survey, how the respondent came to be selected to be part of the survey, a statement guaranteeing confidentiality and anonymity of responses and availability of questionnaire in other formats. In order to meet with the requirements of the Data Protection Act, the letter would also state the purpose for which the data is being collected.

The survey company would carry out the following:

- Printing all questionnaires, covering letters and reply-paid envelopes
- Administration of survey and dispatch
- All postage costs
- Carrying out appropriate steps to maximise response rate
- Monitoring and recording the return of completed questionnaires

Pros: Relatively inexpensive

Cons: Less representative sample than for telephone survey, inferior quality data, longer timescale

4.3.3.3 Option 3: Face to face surveys with actual/potential customers

For accessing actual and potential customers, face to face interviews can also be considered. Surveys would be conducted at car parks, bus and rail stations, shopping centres, retail parks, tourist locations, etc. However, these would only capture actual customers within each town centre. Potential customers would need to be captured in other competing town centres, tourist locations or in the home.

The cost per interview is significantly more for face to face interviews than it is for postal surveys. The advantage of face to face interviews is that longer interviews can be accepted and in this instance, screening questions can be included in the questionnaire to ensure that the target sample can be checked properly before any surveys are undertaken. This may be especially useful to capture customers who are 'potential' rather than 'actual'. Response rate is also typically higher for face to face surveys than it is for other methods of data collection. Similar to postal surveys, we recommend the provision of a prize draw to maximise response rates and our costs include a prize up to the value of £150 (for example a High Street voucher).

Pros: Response rate, longer interview achievable

Cons: Least representative sample, relatively expensive

4.4 Catchment Population Qualitative Survey

The main benefit of the quantitative survey method is the statistical reliability gained from a large and representative enough sample. The main disadvantage, however, is that the method does not allow for much exploration of issues. The data is therefore broad but not deep.

To counter this, therefore, quantitative surveys are often complemented by qualitative focus group surveys. Qualitative research is an interactive process; a way in which to probe underlying perceptions of participants and obtain an understanding of the real issues of importance. The real value of qualitative research is that it allows insight into perceptions and attitudes and the reasons behind these, which would not be uncovered in depth with a structured quantitative questionnaire. Using expert facilitation skills and projective techniques, insight can be gleaned that can shed more information on the quantitative outputs.

The purpose of qualitative research for the Review would be to gain a deeper understanding of the current transport barriers (real or perceived) to accessing the town centres, the potential improvements needed and the extent to which these improvements would translate into more trips to the town centres.

The number and composition of focus groups would be dependent on the targeted customer segments and budget available. We would recommend conducting a minimum of two groups (one with actual customers and one with potential customers) in each town centre.

For each group, around 6-10 participants would be recruited from the quantitative stage of the research (at the end of the quantitative surveys, respondents would be asked if they wished to take part in further research). They would be informed of the subject matter, the purpose of the discussion, the session's duration, start time and location. It is widely acknowledged that even a modest incentive can increase response rates dramatically and is usually given to compensate for participants' time, travel expenses, childcare fees, etc. In this instance, we would advise that a cash incentive of £35 be offered to focus group attendees (incentive costs have been included in the costs below). Each focus group would be held at a venue that is appropriate for and accessible to each target audience (venue costs have not been included in the cost estimate below).

4.5 Business Community Survey

To supplement the research exercises with actual and potential customers, we would also recommend an exercise with local businesses from each town centre.

This could be conducted via an online survey with businesses in each town centre. Businesses would be identified in liaison with the client and local business forums/Chamber of Commerce. A survey link would be made accessible via email.

There are various advantages to using an electronic survey for this group:

- Online surveys are very cost-effective as a large number of businesses can be surveyed at no extra cost which ensures an all-inclusive research process
- Online surveys provide high levels of flexibility as businesses can do it in their own time
- Automatic routing and no manual data entry reduce error in data collection and processing

However, email addresses may not be available for all businesses and some businesses may not have access to email which provides a large bias to the sample of local businesses.

The questionnaire for the survey would consider areas such as:

- Business context and location issues
- Traffic and parking problems for different groups (customers, employees, deliveries)
- Impact of those issues on the business
- Perceived improvements needed to better support businesses
- Likely perceived impact of those improvements

4.6 Typical Costs and Timescales

Typical costs and timescales for delivering the above described survey options are summarised in Table 4.2 below.

Table 4.2: Typical survey option costs and timescales

Options	Scale Assumption	Typical Cost (exc VAT)	Typical Timescales
Telephone interviews	2,000 completed interviews	£26,500	4-6 weeks
Postal surveys	2,000 completed interviews	£12,000	6-8 weeks
Face to face interviews	2,000 completed interviews	£23,500	6-8 weeks
Focus groups	1 focus group	£2,500	4-6 weeks
Online surveys of businesses	All towns	£2,500	3-4 weeks

4.7 Summary

For this study, it is recommended that a telephone survey is conducted of residents living within a reasonable catchment area of each town, up to a County total of about 2,000 completed interviews. This should yield the most representative sample and therefore the most reliable results. This could be followed by bespoke focus group research in order to explore the quantitative survey results in more depth for one of more particular towns.

5. Supply-Side Data Collection Options

5.1 Introduction

The purpose of this section is to summarise data sources, costs and timescales for collecting relevant parking and traffic management supply data.

5.2 Council Car Parks

The following table summarises the number and capacity of Council owned and run car parks in Denbighshire's main towns.

Table 5.1: Council owned town centre car parks

Town	No Car parks	Total Capacity
Prestatyn	9	1,383
Rhyl	8	1,604
Rhuddlan	1	25
St Asaph	1	26
Llangollen	6	404
Ruthin	7	328
Denbigh	5	353
Cowen	1	111
Total	**38**	**4,234**

5.3 Supply Data Collection Sources

Parking and traffic management supply data will be derived from the following sources:

Table 5.2: Supply data sources

Data Item	Source
OS base mapping	DCC
Travel time catchments	Accession
TRO's, on-street parking locations etc	DCC ParkMap
Council off-street car park locations, capacities and tariffs	DCC Parking Management
Private off-street car park locations, capacities and tariffs	Site visit
Directional signage	Site visit

5.4 Supply Data Collection Costs and Timescales

The above data could be collected for all towns for about £5,000 - £7,500 (exc VAT) and within about 3-4 weeks.

6. Demand-Side Data Collection Options

6.1 Introduction

The purpose of this section is to summarise data sources, costs and timescales for collecting relevant parking and traffic management demand and performance data.

6.2 Demand Data Collection Sources

Parking and traffic management demand and performance data will be derived from the following sources:

Table 6.1: Supply data collection sources

Data Item	Source
On and off-street parking occupancy data	DCC Previous parking studies DCC P&D machine revenue statistics Bespoke surveys
Parking enforcement data	DCC Parking Management
Journey times and congestion	Bespoke surveys
Car parking quality observations	Site visit
Public realm quality observations	Site visit
Accessibility quality observations	Site visit

6.3 Demand Data Collection Costs and Timescales

The costs and timescales for this element of work will partly depend on the scope of issues arising from the social research surveys. The following table presents typical bespoke survey costs depending on the data required and the method used to collect it. It should be noted that there would be economies of scale gained through commissioning multiple surveys

Table 6.2: Supply data collection sources

Survey	Unit	Approx Cost (exc VAT)
Off-street car park spot-check occupancy survey	Per car park, per day	£200
On-street parking spot-check occupancy survey	Per street area, per day	£200
Off-street car park plate matching in/out survey	Per car park, over 10 hours	£400
On-street parking beat survey	Per beat area, over 10 hours	£400
Moving observer journey time survey	One observer during peak hours	£300
Automatic Traffic Counter	One counter, over 3 days	£100

These survey costs would need to be multiplied up according to the number of units required, though this would also allow economies of scale to be gained.

Depending on the number of surveys required and the timing of school holidays etc, the above data could be collected over a period of between 4 to 12 weeks.

7. Solution Development

7.1 Introduction

The purpose of this section is to sumarise the main elements

7.2 Constraints and Opportunities

The aim of the above data collection stages is to identify both constraints and opportunities which need resolving and exploiting respectively. Such constraints could be:

- Uncompetitive retail offer
- Unattractive public realm
- Too much traffic
- Lack of public transport access to town centre
- Poor facilities for mobility impaired
- Parking located in the wrong place
- No parking availability

The first stage of the solution development phase is therefore to identify, for each town centre, what the constraints and opportunities are.

7.3 Solution Development

Once each town's constraints and opportunities are identified, appropriate solutions can be developed accordingly. However, it is likely that a number of constraints will require a cross-departmental approach to resolve, while those solutions which are entirely within the control of Denbighshire's Highways Department to deliver may be in the minority.

The output of this stage should be a study report encompassing all aspects of the Review and presenting recommendations for the Council to action.

7.4 Costs and Timescales

It is difficult to estimate costs and timescales for the solution development stage, as it depends on the range and complexity of constraints and opportunities identified.

Consultant fees could range from about £10,000 to £30,000 (exc VAT and including data processing and reporting costs) and the timescale from about 8 to 20 weeks, but these are very speculative estimates.

8. Summary and Conclusions

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Options for proceeding:

1. Commission social research survey for whole county in isolation
    a. See what results are and then commission targetted data collection phase
2. Commission social research survey for one town to prove method
    a. If results acceptable, expand to rest of county and proceed as per option 1
3. Commission all elements of study in one tender
    a. Tender will be difficult to price because of scope uncertainty

Assuming whole study is undertaken, it is likely to range in total cost from about:

	Lo	Mid	Hi
Social research	£15,000	£25,000	£35,000
Supply data	£ 5,000	£ 7,500	£10,000
Demand data	£10,000	£15,000	£20,000
Solution development	£10,000	£20,000	£30,000
Total	£40,000	£67,500	£95,000