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BOROUGH COUNCIL

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EXTRAORDINARY SCRUTINY BOARD AGENDA

Membership: Councillor Shimbart (Chairman)

Councillors Bastin, Mrs Blackett, Bolton, Cousins, Edwards, Farrow, Galloway, Gibb-Gray, Hart, Heard, Hilton, Keast, Kennedy, Lenaghan, Mackey, Pierce Jones, Ponsonby, Mrs Smallcorn, Smith D, Smith G, Smith J, Smith K, Tarrant, Turner, Wilson and Wade

Meeting: **Extraordinary Scrutiny Board**

Date: **Tuesday 17 December 2013**

Time: **5.00 pm**

Venue: **Hurstwood Room - Public Service Plaza**

The business to be transacted is set out below:

Jo Barden-Hernandez
Service Manager – Legal & Democratic Services

9 December 2013

Contact Officer: *Jack Caine and Tristan Fieldsend 02392 446233/02392 446230*
Email: tristan.fieldsend@havant.gov.uk

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PART 1 (Items open for public attendance)

PART 2 (confidential items - closed to the public)

NONE

GENERAL INFORMATION

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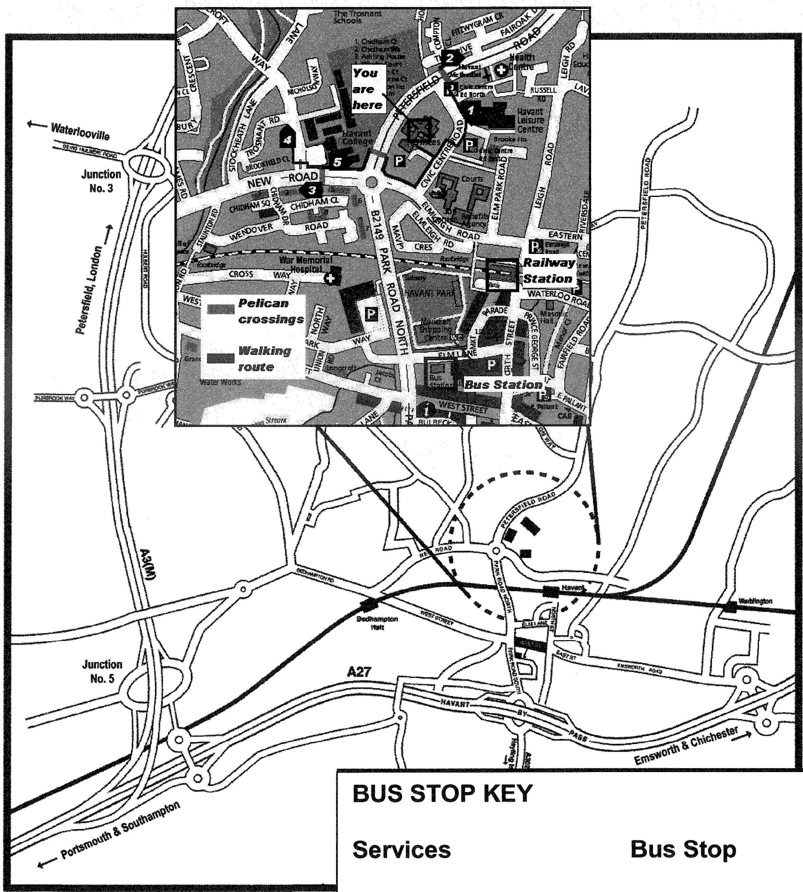

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HAVANT BOROUGH COUNCIL

EXTRAORDINARY SCRUTINY BOARD

REVIEW OF CAR PARKING PRICES IN HAVANT BOROUGH TOWN CENTRES

Report by Neighbourhood Quality Service Manager **ITEM NO 3**

Environment and Neighbourhood Quality Portfolio: Cllr David Collins

Key Decision: N/A

1.0 Purpose of Report

1.1 To provide the Scrutiny Board an opportunity to consider the Review of Car Parking Prices in Havant Borough Town Centres report attached in Appendix 1.

2.0 Recommendation

2.1 That the Scrutiny Board recommends to Cabinet that the proposals set out in the attached report (Appendix 1) be implemented.

3.0 Summary

3.1 The attached report provides the outcome of the review of Havant Borough Council's car parking pricing strategy in the town centres across the borough as requested by the Environment & Neighbourhood Quality Portfolio Holder. The request arose following concerns by councillors, officers and the public with respect to the impact of the current car parking pricing regime, introduced in February 2013, was having on the attractiveness of local centres as a place to shop and visit.

3.2 The outcomes are a number of recommendations for consideration regarding the car parking pricing regime in the borough of Havant.

4.0 Implications

4.1 **Resources:** Any approved recommendations will be taken forward within the current staffing establishment. There is no requirement for additional resources.

4.2 **Legal:** Legal support will be required to implement any approved changes.

4.3 **Strategy:** The recommendations take into consideration all three Corporate Strategy priorities; financial sustainability, economic growth and public service excellence. They also take account of the draft Marketing Strategy.

4.4 **Risks:** There is a risk that if the current pricing regime remains unchallenged town centre car parks will continue to decline in terms of use. This potentially has wider implications as we would seek to encourage a higher footfall in the local centres across the borough.

4.5 **Communications:** Any change to car parking prices will require a communications plan as part of the process.

4.6 **For the Community:** The community would be benefit through the council providing choice to the customer.

4.7 **The Integrated Impact Assessment (IIA) has been completed and concluded the following: N/A**

Appendices:

Appendix 1 - Review of Car Parking Prices in Havant Borough Town Centres

Agreed and signed off by:

Executive Head of Environment and Neighbourhood Quality

Contact Officer: Natalie Meagher
Job Title: Service Manager, Neighbourhood Quality
Telephone: 023 92 446561
E-Mail: natalie.meagher@havant.gov.uk

Report to: **Extraordinary Scrutiny Board**

Title: Review of Car Parking Prices in Havant Borough Town Centres

Author: Natalie Meagher, Service Manager, Neighbourhood Quality

Date: 17th December 2013

1.0 Introduction

1.1 This report provides the outcome of the review of Havant Borough Council's car parking pricing strategy in the town centres across the borough as requested by the Environment & Neighbourhood Quality Portfolio Holder. The request arose following concerns by councillors, officers and the public with respect to the impact of the current car parking pricing regime, introduced in February 2013, was having on the attractiveness of local centres as a place to shop and visit.

1.2 The outcomes are a number of recommendations for consideration regarding the car parking pricing regime in the borough of Havant.

2.0 Scope of the Review

2.1 The key principles to the proposed car parking pricing strategy are:

- To provide choice to the customer
- Targeted approach to usage of individual car parks
- Differential approach to charging regime
- Contribute to a higher footfall in local centres
- No negative impact on the revenue budget

2.2 In consultation with the Environment & Neighbourhood Quality Portfolio Holder, the following factors were agreed to be in scope for this review of town centre car parks:

- Benchmarking of charges against neighbouring authorities
- Consider the impact external factors such as internet shopping, increase in fuel charges etc has had on parking
- Survey car park users to establish the reasons why and how long people are parking for
- Survey on street (limited wait) parking users to establish the same as above
- Consider the impact of local privately owned car parks has had on council owned car parks
- Look at the trend in terms of usage in our car parks over the course of 5 years
- Consider the level and structure of charges in car parks across the borough, taking into account local differentials and section 3 of the

Council's Parking Policy which relates to setting appropriate charges
- Consider the level of on street limited wait parking and the associated waiting times

2.3 Car parks at Beachlands and in the vicinity of the Public Service Village are out of scope of this review.

3.0 Background to Review

3.1 Petitions

3.1.1 In May 2013 the Council received a petition with respect to car parking on Hayling Island. The petition raised a number of issues for the Council to consider. The number of signatures contained within the petition triggered a debate at full Council.

3.1.2 The petition from Hayling Island requested that Havant Borough Council:
- Scrap proposals to introduce car parking charges for visitors to Hayling Health Centre
- Reverse the recently increased car parking charges in Mengham
- Give serious consideration to a new 30 minute parking period in car parks in Mengham

3.1.3 In addition to the petition from Hayling Island, residents of Emsworth also submitted a petition which raised similar concerns. This petiton requested that Havant Borough Council;
- Reverse the recently increased car parking charges in Emsworth
- Introduce a new free of charge parking period in Emsworth's car parks

3.1.4 In July 2013 it was agreed at Council by Members that officers will carry out a review of parking charges in the borough's town centre car parks following the debate regarding the Hayling Island petition. The review was to take forward the recommendations tabled at the meeting by the Portfolio Holder, these were;

- To carry out a review of charges in pay and display car parks (excluding Beachlands)
- Look at on street parking arrangements
- Consider options for the free section of the Hayling Island Health Centre car park

3.2 <u>Chronology of decisions leading up to review</u>

- February 2012 - Parking prices review considered by Cabinet.
  - ➢ Review proposed general increase from 70p to 80p for an hour, and 90p an hour for both Wellington Way and South Street car parks.
  - ➢ Review also proposed introducing charges to Hayling Island Health Centre car park reserved for patients.
  - ➢ Cabinet resolved that the report be agreed as part of the budget proposals recommended to Council.
  - ➢ Cabinet were also of the view that recommendations put forward by Scrutiny Board required further work due to the potential loss of revenue if their proposals had been adopted.
  - ➢ Agreed increase in charges put on hold until Scrutiny report completed.
- October 2012 - Cabinet considered further report from the Board which agreed proposed charges (90p) for Wellington Way and South Street.
  - ➢ 80p increase agreed but would be subject to further investigation.
- December 2012 – Council resolved to introduce a one hour blanket charge of £1.00 across all town centre car parks.
  - ➢ Also resolved that Hayling Health Centre would have same arrangements as Havant Health Centre.
- February 2013 - Car parking increases introduced.
- May 2013 – Petition received from Hayling Island.
- July 2013 – Hayling Island petition debated at Full Council.
- July 2013 – Petition received from Emsworth.
- October 2013 – Emsworth Petition debated at Full Council.

4.0 Review Methodology

4.0.1 The Review undertaken has considered:

- Existing Strategies
- Current usage of town centre car parks
- Trends over past 5 years (car park activity & income)
- Customer surveys
- Benchmarking
- Financial position
- External influences

4.0.2 To support officers in this work a Scrutiny Panel was established to assist with this report so that local views were captured and fed into this process. The Panel consisted of the following councillors:

Councillor G Shimbart (Chair)	Councillor D Keast
Councillor M Wilson	Councillor R Galloway
Councillor R Cousins	Councillor K Smith

4.0.3 The Panel members were asked to provide their thoughts on their local area car parking situation, specifying any particular special circumstances regarding parking. Furthermore, officers were specifically interested to establish local characteristics, pressure points / times in & around car parks, under used car parks, and future changes that may impact on car park usage, such as new developments.

4.0.4 Feedback from the Panel can be viewed at Appendix A.

4.1 <u>Strategic Context</u>

4.1.1 <u>Corporate Strategy</u>
The shared parking service is underpinned by all three priority themes as set out in the Corporate Strategy.

4.1.2 <u>Financial sustainability:</u> The Council faces considerable financial pressures in the coming years. With decreasing Government funding and pressures from all to keep taxes low this means the Council needs to ensure services are self-sustaining and, wherever possible, contribute to ensuring the Council can provide other vital public services. The Council balances its needs for financial sustainability against those of the public. In difficult financial times our visitors and residents need parking prices at an affordable level. The feedback from customers in the petitions emphasise this need. Our tax payers also demand we keep our tax levels low. In this review the Council tries to achieve this difficult balance between its financial sustainability, that of its tax payers and that of those who use our car parks.

4.1.3 <u>Economic Growth:</u> There is a direct link between the offer provided in a town centre and the parking arrangements that are in place. Whilst the charging regime may not adversely affect the local economy, through this review it is recognised that the parking offer has to reflect the centre to which it relates. Introducing a differential charging regime, specific to each car park, where pricing is pitched at a certain level, aims to encourage our customers into the car parks.

4.1.4 In addition to this providing choice and promoting offers for residents, customers and local businesses should contribute to a higher footfall in local centres.

4.1.5 <u>Public Service Excellence:</u> Working across two councils the service provides efficiencies and flexibility which benefits both partners. Customer surveys are used to help shape and improve the service as we move forward, both in the way we operate and the charges we may look to implement. This is complimented by data we can use from the meters on vehicle use.

4.1.6 For the purpose of this review customer insight has been gained by carrying out interviews with those using the town centre car parks. In addition to this, the requests raised by the two petitions received have been taken into consideration when revisiting the charging regime.

4.1.7 Marketing Strategy

The shared parking service also links into the Marketing Strategy. The borough's off street parking arrangements provide choice to the customer as the parking offer sits alongside private provision in most town centre locations across Havant. It has therefore been essential to consider the private provision on offer in each area when carrying out this review, in order to promote a service that provides choice and value for money for the customer.

4.1.8 The customer insight gained through the survey work has also helped to inform the recommendations and proposals put forward as part of this review.

4.1.9 2007 Parking Strategy

In 2007 the Council adopted a revised parking policy. The following policies are relevant to setting charges;

1 (a) Recognise the need to maintain the vitality and viability of town centres and therefore favour short-term parking for shoppers and visitors at the expense of long stay parking.

1 (b) Set parking charges at appropriate levels for the local area to balance parking supply and demand, taking account of transport strategies and the economic viability of commercial centres.

3 (a) Set parking charges which do not discourage the use of local facilities or disadvantage local business.

3 (b) Seek to ensure a consistent approach to charging levels by considering the charging strategies of private operators within the borough and those of neighbouring authorities.

3 (c) At a minimum recover the costs of the service and where appropriate consider options for increasing income through additional charges.

4.1.10 The original proposal agreed by Cabinet in February 2012 had taken account of the Policy and had also included a benchmarking exercise with private operators within the borough and also adjacent councils.

4.1.11 This review and the recommendations that follow have had regard to all of the above policies and strategies.

4.2 Benchmarking

4.2.1 The table shown at Appendix B draws together car parking charges for town centre parking in neighbouring local authority areas.

4.2.2 It is however, important to note that a direct comparison should not be drawn between the local authority areas listed and with Havant, as there are fundamental differences across them all. Each local authority area has an individual character, make up and setting. Therefore, there is a risk if a direct comparison is made. With the aim of demonstrating the differences as well as any similarities with Havant, further detail for each area is provided in the comparison table.

4.3 Impact of External Factors on Parking

4.3.1 Impact on High Street
It is widely debated that the decline in town centres can be attributed to parking and more significantly parking charges. It is correct that parking does have an affect and when changes to parking are introduced consumer behaviour can change in the following ways:

- A change in parking location to avoid paying the new charge
- A reduction in the length of stay resulting in reduced parking costs
- An acceptance of the new arrangements
- A likelihood that behaviour will revert to the same eventually

4.3.2 However, there is little evidence to uphold the perception that a change in parking will adversely affect a town's economy. The limited evidence that is available suggests that it is the town's broader retail, commercial, leisure offer which is the primary factor for affecting a town's competitiveness.

4.3.3 On-line Shopping
Internet shopping is increasing. The scale of economies and efficiencies offered by online companies is proving fierce competition to high street shops.

4.3.4 According to the Centre for Retail Research (CRR) the share of consumer spend on the high street has fallen from 50% in 2000 to a predicted 40% by 2014. In comparison, online shopping continues to grow and is predicted to account for almost 22% of all retail sales by 2018. Currently it is at around 12%. Convenience and accessibility in part accounts for this shift as the internet becomes more widely available through mobile devices and wireless connectivity.

4.3.5 The percentage of food purchased on line is relatively low at 3.2% of total spending (ONS, Aug 2013) and this has been highlighted by the organiser of the Emsworth petition. However, evidence suggests that this trend is set to continue gaining momentum as the year on year growth rate shows that this has increased by over 15% when compared to the same time in 2012.

4.3.6 Incentives

The CRR also predicts that smaller, local shops are likely to be hit hard over the next five years as customers shopping habits change to more online shopping, retail parks and larger town centres. Shops in local neighbourhoods are predicted to fall by 26% by 2018. Even where multiple retailers provide smaller versions of their chain in these areas (Tesco's Express, Sainsbury's Local etc), the incentives used to encourage shoppers into their larger stores are not promoted at the local level. This in turn is likely to encourage shoppers into main centres due to perceived lower prices, better deals and availability of stores.

4.3.7 Larger, multiple retailers also have the capacity to incentivise by using loss leaders, whereby consumers are attracted to items sold at lower than market cost which tends to stimulate the purchase of other more expensive, profitable goods. Again, local shops are unable to compete with this.

4.3.8 Petrol Prices

In January 2007 the average cost of a litre of unleaded petrol was 84p. In January 2013 that had increased to £1.33, and in September it had increased further to £1.38. See Appendix C for details.

4.3.9 In response to these increases consumers behaviour has changed, however, the change is not in the amount of fuel that is purchased as this continues to remain fairly static. Increasing petrol prices affect consumer spending in other ways, such as holidays taken or entertainment or eating out. Evidence suggests that if an area meets a consumers identified needs then they will be prepared to drive to it. For example, based on the survey results, Appendix D shows the locations from which those travelling to South Street car park are coming from; 75% are outside of the borough.

4.4 Parking Surveys

4.4.1 The shared parking service has access to data and statistics which can provide information regarding the level of income taken in the borough's car parks, the length of time motorists are parking for, and the footfall in terms of the number of transactions occurring at any given point. Other data held by the service provides evidence of the number of vehicles recorded by the Civil Enforcement Team and the number of Penalty Charge Notices issued.

4.4.2 Notwithstanding the above, to shape the outcomes for this review it was identified by officers that there was a requirement for additional information. Whilst the level of information available to map the mechanics of the service is plentiful, there is little evidence to show why people are parking where they do and what their behaviour patterns are. Survey work was therefore required to glean specific information from motorists.

4.4.3 It is broadly agreed that each area within the borough should be looked at in its' own right and the differentials should be taken into consideration when putting recommendations forward. Therefore any survey work commissioned would need to take place in each area and more specifically in the majority of the car parks across the borough if the evidence was to be robust enough to support proposals.

4.4.5 Over a period of three weeks, over 600 surveys were carried out on weekdays and also on Saturdays to gain an insight into the behaviour patterns of those people using the borough's car parks. This work commenced at the beginning of September in an attempt to capture routine behaviour patterns and not those influenced by the holiday season / school summer holidays.

4.4.6 Another target for this review was to carry out a similar exercise for free on street limited wait bays that are peppered in and around the borough's town centres. However, it has not been possible to deliver detailed survey work within the timescales of this report. Analysis has been carried out in relation to the data the parking service already has access to and one outcome of this report is to recommend that a survey of the borough's on street parking arrangements is carried out in the future.

4.4.7 Survey Headlines

- 48% park for shopping
- 10% park for work / business
- 40% park for less than 30 minutes
- 72% park for convenience, nearest to their destination
- 40% use the same car park at least weekly

4.5 Limited Wait Parking Offer

4.5.1 Due to time constraints it has not been possible to carry out a full review of the on street parking arrangements across the borough. However, data collated by the Civil Enforcement Officers has been analysed to provide the following information. Between April and September 2013 over 8500 vehicles were recorded on street in Emsworth by the team. Of this number just 4% were issued with a Penalty Charge Notice which suggests that the bays are being used appropriately and turnover of the bays is being maximised. As there are in excess of 100 free on street spaces in Emsworth and they are being used correctly, it is not considered that a free period in the car park is necessary. Any free period would result in a loss of income to the council.

4.5.2 There are 31 on street limited wait bays situated close to the car parks on Hayling Island. In addition to these, a further 24 limited wait bays were introduced into the car parks as an initial response to the petition which called for more accessible free parking to support local businesses. The bays went live in June 2013 and since that time 976 vehicles have been recorded. 11 Penalty Charges Notices have been issued which suggests that the bays are being well utilised and used correctly.

4.5.3 Havant has 73 on street limited wait spaces close to the centre of town. There have been no queries raised with regards to the level of on street limited wait parking in Havant.

4.5.4 Waterlooville offers 12 on road spaces limited to 30 minutes and unlimited parking on a number of residential roads surrounding the town centre. No issues have been raised regarding on street parking arrangements close to the town centre.

4.5.5 Leigh Park has 29 spaces on street and at the entrance to Greywell car park, which provide 30 minutes free parking. Whilst there is little evidence that there is a shortage of on street limited wait bays to use (plus those in Greywell) all of these are situated at the Eastern end of town. By introducing a similar scheme into Tidworth Road car park it may help to encourage consumers into the Western end of the town centre.

4.5.6 In Cowplain there are 11 on street spaces close to the shops which provide free parking for 30 minutes. There is also free parking at the rear of the Lidl store.

4.5.7 In addition to the on street parking arrangements and the standard parking offer off street, the parking service has a number of deals available. These are detailed in the table below.

4.6 Current Parking Regime and Offers

4.6.1 The current parking charges are included at Appendix E

Residents Permits	On street – Emsworth	£30
	Off street – Leigh Park	£30
	On street – Havant	£30
Visitor Scratchcards	On street – Havant	£5 per book of 10
Business Permits	Borough wide	£400 per annum £240 for 6 months £150 for 3 months Buy 2 get 3rd ½ price
Buy One (hour) Get One Free	Borough wide	Last Saturday of each month
Overnight Motor Home Parking Permit	Beachlands West	£10 / night (low season) £15 / night (high season)
Gold Permit	Borough wide including Beachlands	£500 per annum

4.7 Five Year Trend

4.7.1 Over the last five financial years income from town centre car parks has fallen from £657,000 in 2008/09 to £640,000 in 2012/13. At its peak income reached £690,000 in 2010/11. The decline in income continues when considering the current financial year showing approximately £80,000 below the budget base as at October 2013. Individually some car parks remain fairly static in terms of their income levels, whilst some have experienced a fall in revenue of up to 50%. Appendix F shows the level of income for each town centre car park since 2008/09.

5.0 Outcome of the Review

5.1 Proposed Strategy & Key Priorities

The key principles to the proposed car parking pricing strategy are:

- To provide choice to the customer
- Targeted approach to usage of individual car parks
- Differential approach to charging regime
- Contribute to a higher footfall in local centres
- No negative impact on the revenue budget

5.1.1 This review aims to promote a new approach to the way in which the charging regime is developed. All the evidence points towards the concept of differential charging. Within the borough, the centres are all very different and the offers available at each do not compare necessarily to another area locally. To move this forward the idea has been to analyse and understand each town centre and identify the characteristics within each. In turn, each car park has been considered in relation to its proximity to the town centre, its current offer and how this can be altered to encourage a higher footfall in the centres and turnover in the car parks.

5.1.2 The borough’s car parks run alongside privately operated car parks, which provide both competition and choice to the customer. As a result, in some areas, the Council is not the main provider of off street parking.

5.2 Proposed Pricing Strategy

5.2.1 The current budget base for 2013/14 is £1.015m for all car parks. Taking into account the revenue received to date for this year, the predicted level of income by the end of the year is likely to be approximately £847,000; £168,000 under budget. This indicates that there may be resistance to the £1.00 charge. The budget base for 2014/15 has taken this into consideration, and assumed a budget of £900,000 based on the £1.00 charge.

5.2.2 Table A (Proposed Pricing Strategy) contains details of each centre in the borough listing their characteristics and current parking offer. The individual car parks are included separately and the table also shows the headline survey results and the proposed strategy for each. The 'pricing options' are the proposed charges and the 'financial implications' identify the potential income based on these proposals and how this fares when compared to the current financial year.

5.3 Further Recommendations

The table captures the detail regarding the pricing regime, in addition to this there are other recommendations that this report suggests. These are as follows:

1. A borough wide 'out of hours' residents permit. Allowing residents to use the car parks for a one off payment (£50) before 10.30am and after 4pm
2. A lease arrangement is negotiated to manage the car park at Town End House pending redevelopment
3. A full survey is carried out of our on street limited wait spaces in and around town centres
4. A survey of shoppers who do not use the car parks is carried out
5. A rolling programme of surveys is set up to ensure that data is robust and current to inform future car parking strategies and charging regimes
6. To retain the new limited wait bays in the Pay & Display part of the Health Centre car park on Hayling Island
7. Negotiate with the Hayling Island Health Centre with regards to taking responsibility for parking charges in the allocated area of the car park on behalf of their patients

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Appendix A – Feedback from Scrutiny Panel

Views provided by Cllr Keast

Cowplain

- Need to take a strategic view to parking charges across the Borough
- Increase to £1 for an hour is seen as excessive
- Mission Lane is under used during the day due to availability of free parking in Cowplain
- Mission Lane is used heavily after 6pm and on Sundays
- Reduction in day time rate (£1 for an hour) could be compensated by introducing a £1 charge from 6pm to 8am and a similar charge for Sundays

Waterlooville

- £1 for an hour's parking in Wellington Way is too high and cannot compete with Dukes Walk or the Curzon Rooms car park prices (£1 for two hours)
- Perception is that numbers parked at Rockville Drive have reduced since the price increase
- Original proposal of 10p is an acceptable increase
- Need to revisit list of improvements put forward by Scrutiny Board in 2012
- Need to create a level playing field across the borough

Views provided by Cllr Galloway

Emsworth

- Introduce a pay by coin system – 10 mins for 10p, 20 mins for 20p etc
- Maximise space in South Street car park by moving recycling bins
- Stop giving 5 or 6 spaces to meals on wheels
- Better signage for Palmers Road and the subway
- South Street should remain a short stay car park
- Bridge Road to be turned into a staff permit holders car park
- Introduce a tier system – closer to centre = more expensive parking
- Differential charging basis between short stay shoppers and longer stay visits
- Review Double Yellow Lines in Emsworth to establish if more on street parking could be made available
- Double Red Lines should be introduced onHigh Stree outside green grocers and hardware shops

Views provided by Cllr Smith

Bedhampton

- Suffers from commuters parking in residential areas during working day
- Above can cause obstruction and inconvenience
- Lack of long term parking available
- Lack of parking provided by large employers

Havant

- Adequate parking for shoppers
- Expensive parking for Railway Station
- Suffers from commuters parking in residential areas during working day
- Lack of parking provided by large employers

Views provided by Cllr Cousins

Leigh Park

- Perception is that parking charges discourage trade but there is no proof
- Provide a number of limited wait bays in Tidworth Road car park

Appendix B – Comparison of Parking Prices Across Neighbouring Authorities

East Hampshire				
Characteristics:	• Population: 115,608 • Area / Hectares: 51,444 • Differential Charging: No • Predominantly rural • Off street parking charges in two areas; Petersfield & Alton			
Car Park Charges	Up to 1 hour	Up to 2 hours	Up to 3 hours	Up to 4 hours
	50p	£1.00	£1.40	£2.80
Eastleigh				
Characteristics	• Population: 125,199 • Area / Hectares: 7,978 • Differential Charging: No • Rural borough with urban centre • Centre redevelopment comprising major high street chain stores and leisure activities			
Car Park Charges	Up to 1 hour	Up to 2 hours	Up to 3 hours	Up to 4 hours
	£1.30	£2.50	£3.40	£4.20
Fareham				
Characteristics	• Population: 111,581 • Area / Hectares: 7,423 • Differential Charging: Yes • Large shopping centre for size of borough			
Car Park Charges	Up to 1 hour	Up to 2 hours	Up to 3 hours	Up to 4 hours
	£1.00	£2.00	£3.00	£4.00

Gosport				
Characteristics	• Population: 82,622 • Area / Hectares: 2,532 • Differential Charging: No • Dormitory town			
Car Park Charges	Up to 1 hour	Up to 2 hours	Up to 3 hours	Up to 4 hours
	30p / 60p	60p		
Havant				
Characteristics	• Population: 120,684 • Area / Hectares: 5,537 • Differential Charging: No			
Car Park Charges	Up to 1 hour	Up to 2 hours	Up to 3 hours	Up to 4 hours
	£1.00	£1.60		£3.00
New Forest				
Characteristics	• Population: 176,462 • Area / Hectares: 75,313 • Differential Charging: No • Predominantly rural • Main centres are Lymington and Ringwood			
Car Park Charges	Up to 1 hour	Up to 2 hours	Up to 3 hours	Up to 4 hours
	80p	£1.50	£2.20	£3.00
Test Valley				
Characteristics	• Population: 116,398 • Area / Hectares: 62,758 • Differential Charging: Yes • Predominantly rural • Two main centres with off street parking charges; Romsey and Andover			

Car Park Charges	Up to 1 hour	Up to 2 hours	Up to 3 hours	Up to 4 hours
	90p	£1.50	£2.00	£2.60
Winchester				
Characteristics	• Population: 116,595 • Area / Hectares: 66,097 • Differential Charging: Yes • City centre sat within largely rural area • Main shopping centre is extensive and diverse • Park & Ride scheme in operation			
Car Park Charges	Up to 1 hour	Up to 2 hours	Up to 3 hours	Up to 4 hours
	£1.30	£2.70	£3.50	£4.50
Arun				
Characteristics	• Population: 149,518 • Area / Hectares: 22,071 • Differential Charging: No • smaller town centres; Bognor Regis, Littlehampton, Arundel • Bognor Regis is awaiting plans for regeneration			
Carr Park Charges	Up to 1 hour	Up to 2 hours	Up to 3 hours	Up to 4 hours
	70p	£1.40	£2.10	£2.80
Chichester				
Characteristics	• Population: 113,794 • Area / Hectares: 78,623 • Differential Charging: Yes • City centre offers broad range of high street and independent shops • Smaller towns offer more specialised shopping offers (Midhurst & Petworth)			
Car Park Charges	Up to 1 hour	Up to 2 hours	Up to 3 hours	Up to 4 hours
	£1.20	£2.40	£3.60	£6.00

Appendix C – Petrol Prices

Month	2007	2008	2009	2010	2011	2012	2013
January	87.3p	104.0p	87.0p	111.4p	127.9p	133.3p	132.7p
February	86.7p	104.3p	90.2p	112.1p	128.7p	135.1p	137.1p
March	89.4p	106.4p	90.8p	115.6p	132.2p	138.9p	138.8p
April	92.6p	108.1p	94.8p	120.5p	134.7p	141.9p	136.7p
May	95.6p	112.5p	97.7p	121.0p	136.7p	137.9p	133.9p
June	96.9p	117.6p	102.2p	118.2p	135.7p	133.1p	134.6p
July	96.7p	118.7p	103.0p	117.3p	134.9p	132.1p	135.7p
August	96.0p	113.4p	103.9p	116.2p	135.5p	135.9p	137.5p
September	95.3p	112.0p	106.2p	115.3p	135.4p	139.6p	137.7p
October	97.7p	104.7p	105.7p	117.4p	134.6p	138.5p	
November	101.1p	94.9p	108.4p	118.9p	133.8p	135.3p	
December	102.8p	89.5p	108.2p	122.0p	132.5p	132.7p	

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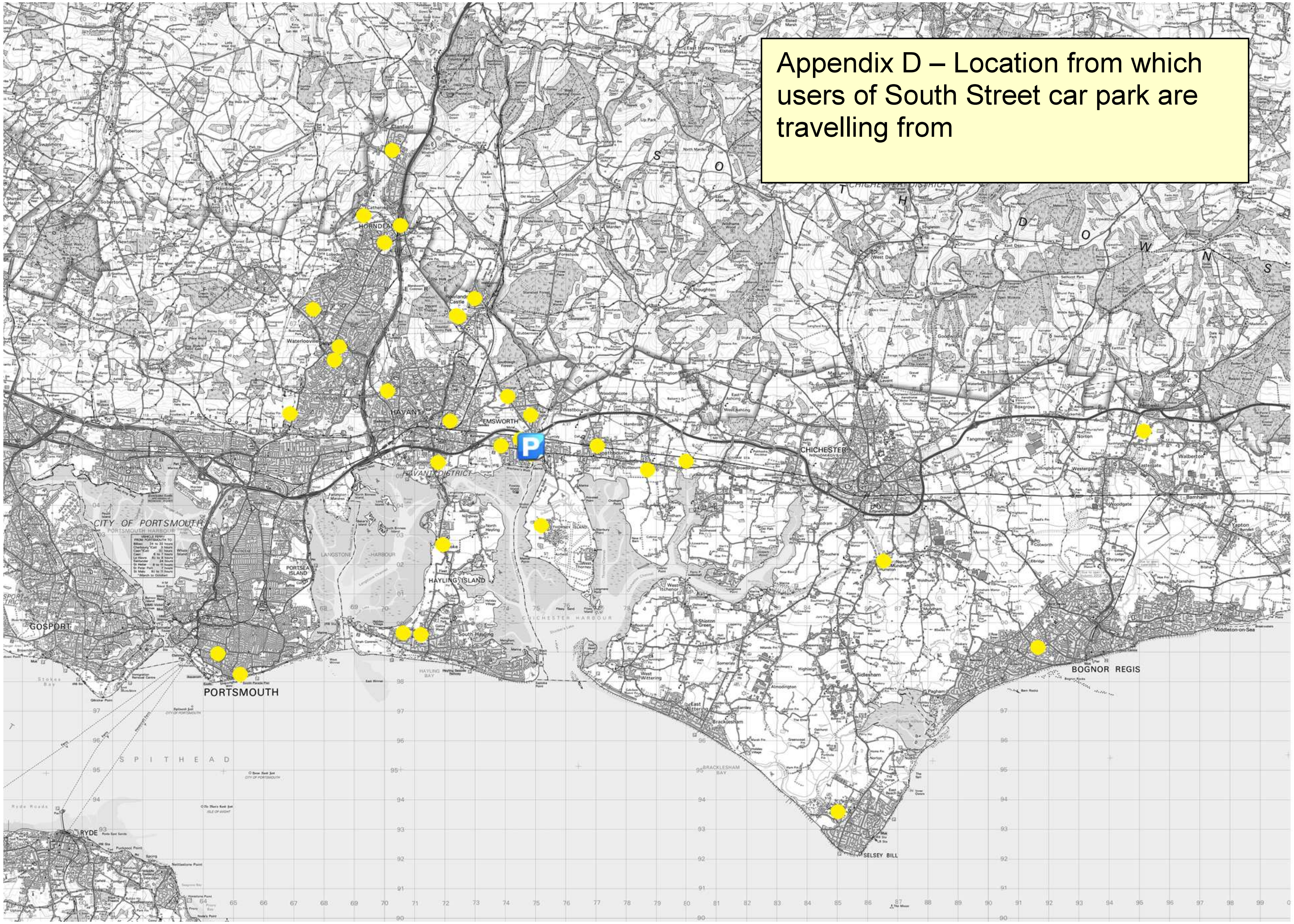
Appendix D – Location from which users of South Street car park are travelling from



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Appendix E - Current Parking Prices (wef 1st February 2013)

	Emsworth				Havant							Waterlooville		Hayling Island			Cowplain	Leigh Park		
	North Street	Palmers Road	South Street	March – October inclusive Sundays and bank/public holidays	Town End House	East Pallant	Prince George's Street Mon – Sat 9.00am to 6.00pm and (free between 3.00pm and 3.15pm Mon – Fri)	Elmleigh Road	Civic Centre Road East (Monday to Friday)	Civic Centre Road North (Monday to Friday)	Civic Centre Road North and East Saturday and Sunday and Bank/public holidays	Wellington Way	Rockville Drive	Elm Grove	Health Centre	Mengham Lane	Mission Lane	Tidworth Road	Greywell	Somborne Drive (Lidl)
up to 30 mins																	£0.40			
up to 1 hour	£1.00	£1.00	£1.00		£1.00	£1.00	£1.00	£1.00	£0.50	£0.50		£1.00	£1.00	£1.00	£1.00	£1.00	£1.00	£1.00	£1.00	£0.60
up to 2 hours	£1.60	£1.60	£1.60		£1.60	£1.60	£1.60	£1.60	£0.80	£0.80		£1.60	£1.60	£1.60	£1.60	£1.60	£1.60	£1.60	£1.60	£1.00
Up to 3 Hours									£1.00	£1.00										
up to 4 hours	£3.00	£3.00	£3.00		£3.00	£3.00	£3.00	£3.00	£2.50	£2.50		£3.00	£3.00	£3.00	£3.00	£3.00	£3.00	£3.00	£3.00	
over 4 hours		£5.00						£5.50	£5.50	£5.50			£5.00	£5.00	£5.00	£5.00	£5.00	£5.00	£5.00	
any length of stay				£1.00							£1.00									

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Appendix F – Five Year Trend

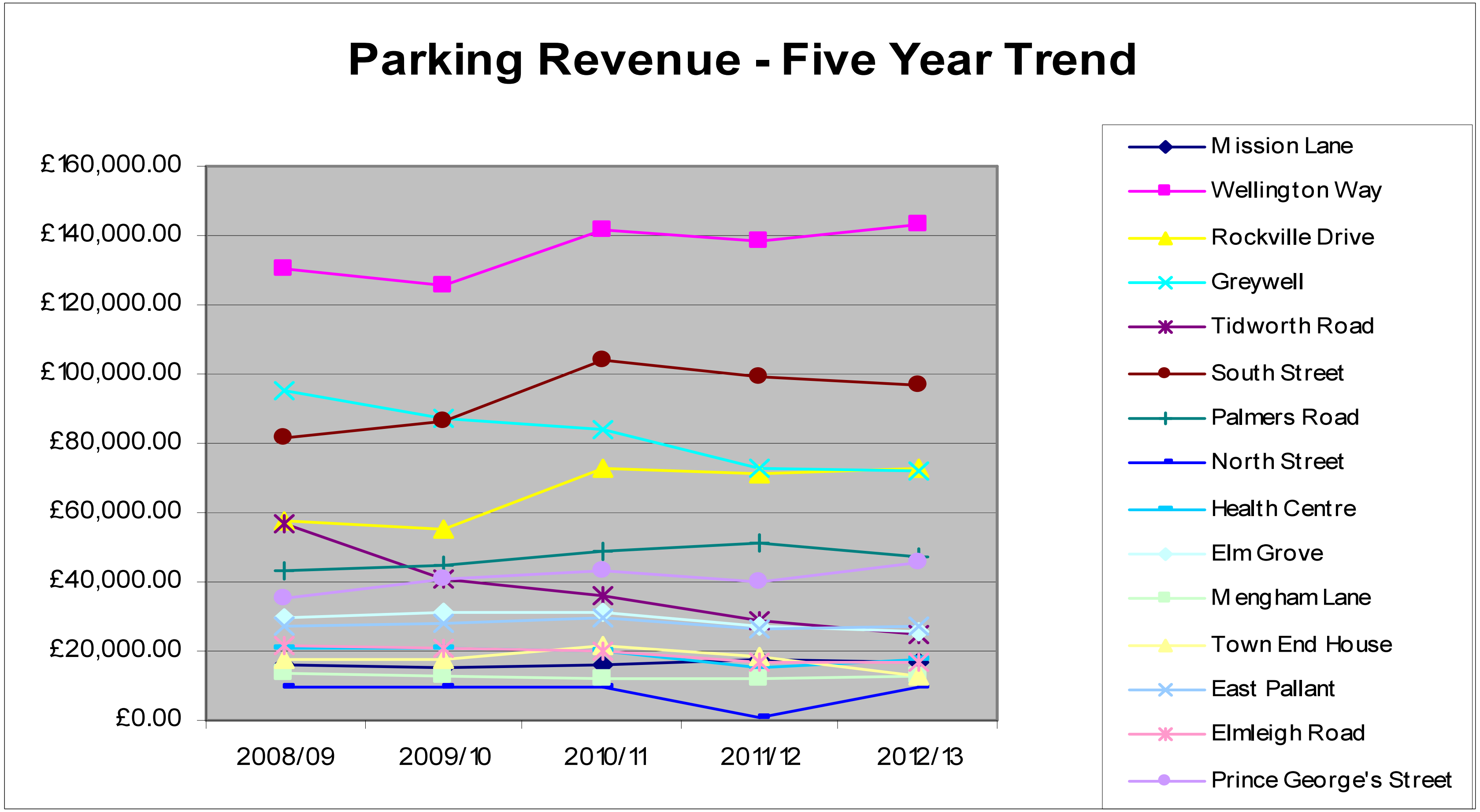

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Table A – Proposed Pricing Strategy

Key Principles for Car Parking Strategy: • To provide choice to the customer • Differential approach to pricing regime	• Contribute to higher footfall in town centres • Targeted approach to usage of individual car parks • No negative impact on Revenue Budget
Assumptions: • Current Income based on year to date 13/14 • Season ticket sales based on current take up • Proposed income based on pre £1 increase Car Park activity where appropriate	• Average number of cars parked based on 2012 (pre £1 inc) • No resistance factors assumed • All changes to pricing to be implemented by 1st April 2014 • Maximum number of new season tickets are sold

Havant

Characteristics	• Town centre • Significant number of food outlets and major retailers • 189 shops • Centre of town shifted to west of Park Road (North & South) • HBC own less than 8% of off street parking
Parking Offer	• HBC managed off street – 138 spaces • Private off street - 1015 (free) • Private off street - 740 (charges apply) • On street limited waits – 73 (North Street, Market Parade, Beechworth Road, West Street and Fairfield Terrace)

Car Park	Characteristics	Survey Results	Proposed Strategy	Current Income	Average Numbers Parked	Proposed Pricing Options		Financial Implications
Prince Georges Street (53 spaces)	• Prime location • Level access parking • Main car park on north side of town • Provides free limited wait parking for school • Short stay	• Reason for parking – shopping is 75% • Majority park for between 30 mins & 2 hours – 80% • 46% used this car park due to its location	• Retain as short stay car park • Remove season ticket offer to encourage above • Aim is to be primarily used by shoppers and parents on school run	Predicted for 13/14 £47k	44,530	1hour 2 hrs 4 hrs	£1.00 £1.60 £3.00	Pricing regime to stay the same, therefore no change

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Table A – Proposed Pricing Strategy

East Pallant (29 spaces)	• Limited offer close by • Short walking distance to North Street • Short stay	Not surveyed	• Retain as a short stay car park • Provides choice of location in comparison to PGS	Predicted for 13/14 - £29.5k	23,485	1 hour 2 hrs 4 hrs	£1.00 £1.60 £3.00	Pricing regime to stay the same, therefore no change
Town End House (30 spaces)	• Under used car park • Further distance from main centre • Mainly used for Arts Centre, Hayling Bill Trail and local dental practice • Short stay	Not surveyed	• Change to long stay • Half to be used for pay & display, cheaper pricing to reflect location of car park • Half to be used for season tickets • Target for permits will be workers, local residents & businesses • Proposed charges reflect time required to visit local amenities.	Predicted for 13/14 - £14k	12,382	2 hrs 3 hrs All day	£1.00 £2.00 £3.00	Potential annual income: £15k Increase of £1k
						Season Tickets		PLUS: Potential annual income: £5.2k
						3 mth 6 mth 12 mth	£125 £200 £350	
Elmleigh Road (26 spaces)	• Under used car park • Located on north side of railway line • Prime location for Public	• 80% parking to access Job Centre or wider Public Service Village • 70% parked	• To promote and encourage use by railway commuters by introducing a very competitive season ticket offer. (Network Rail	Predicted for 13/14 - £18k	Not available	½ hr 1 hour 2 hrs All day	60p £1.00 £1.60 £3.00	Based on this year's income: £18k

Table A – Proposed Pricing Strategy

	for Public Service Village and Railway Station • Short & long stay	• 70% parked for less than 30 minutes • 10% long stay parking	(Network Rail prices: £31 wkly / £89 mnthly / £267 3xm / £930 12xm)			Season Tickets 3 mth 6 mth 12 mth	 £230 £325 £400	PLUS: Potential annual income: £4k
Waterlooville								
Characteristics	• Town centre • High number of food outlets and major retailers • 200 shops • Own minority of parking offer in town							
Parking Offer	• HBC owned off street – 182 • Private off street – 936 (free) • Private off street – 65 (Curzon Rooms) + 247 (Dukes Walk) = 312 • On street limited waits - 12							
Car Park	Characteristics	Survey Results	Proposed Strategy	Current Income	Average Numbers Parked	Proposed Pricing Options		Financial Implications
Wellington Way (124 spaces)	• Prime location • Short stay • Popularity has declined due to cheaper competition • Short stay	• Almost 80% parked for less than 1 hour • 85% parked for convenience	• To offer choice and to compete with private provider. • To retain as a short stay to increase turnover and footfall in centre	Predicted for 13/14 - £123k	161,305	¾ hr 1 hour 3 hrs	70p 90p £1.80	Potential annual income: £130k Increase: £7k

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Table A – Proposed Pricing Strategy

Rockville Drive (58 spaces)	• Further distance from main centre • Short & long stay	• Almost 30% using car park for work purposes • 53% parked for shopping	• To provide alternatives to private parking providers. • Also to cater for local workers both part time and full time.	Predicted for 13/14 - £68k	65,238	1 hour 2 hrs 5 hrs All day	80p £1.50 £2.50 £3.00	Potential annual income: £75k Increase: £7k
						Season Tickets		Potential annual income: £7.8k Loss: £1.2k
						3 mth 6 mth 12 mth	£125 £200 £350	

Table A – Proposed Pricing Strategy

Emsworth

Characteristics	• District centre • Good variety of independent and chain shops • Popular leisure / tourist destination • 120 shops • HBC main provider of parking in area • High number of on street limited wait parking in relation to size of area
Parking Offer	• HBC owned off street – 292 • On street limited wait - 119

Car Park	Characteristics	Survey Results	Proposed Strategy	Current Income	Average Numbers Parked	Proposed Pricing Options		Financial Implications
South Street (100 spaces)	• Accessible • Centrally located to shops / restaurants and Mill Pond • Popular & busy car park • Short & long stay	• 75% visited from outside of the borough • 50% parked for leisure reasons / on holiday	• To retain short stay to maximise turnover and footfall in centre • Primary focus is on those who visit area for shopping and leisure activities	Predicted for 13/14 - £126k	82,894	1 hour 3 hrs 4 hrs	90p £1.80 £2.50	Potential annual income: £145k Increase: £19k
Palmers Road (117 spaces)	• Not centrally located • Short walking distance to amenities via subway • Long stay	• 60% parked for less than an hour • Shopping is main reason for parking (44%)	• Retain long stay • Provide and promote affordable ½ day and day rates to attract local workers	Predicted for 13/14 - £55.5k	44,009	1 hour 2 hrs 5 hrs All day	80p £1.50 £2.50 £3.00	Potential annual income: £60.7k Increase: £5.2k

Table A – Proposed Pricing Strategy

	• Long stay	(44%) • A further 30% parked to visit hairdressers, church & post office				Season Tickets		PLUS Potential annual income: £10.2k Loss: £1.6k
						3 mth 6 mth 12 mth	£125 £200 £350	
North Street (23 spaces)	• Remote from main centre • Tends to be used for hospital visits / North St • Short stay	Not surveyed	• Small car park so need to retain as short stay • Provide offer for part time workers at affordable ½ day rate	Predicted for 13/14 - £8.5k	10,282	1 hour 2 hrs 5 hrs	80p £1.50 £2.50	Potential annual income: £12k Increase: £3.5k
Bridge Road	• Located some distance from amenities / railway station • Residents car park	Subject of a separate survey	• Introduce residents permits (charges to match those with on street permits) • Maximise usage during day by providing long stay parking for local workers •	None, currently a free car park	Not available	All day	£3.00	No action, subject to separate Cabinet decision in 2014
						Season Tickets		
						3 mth 6 mth 12 mth	£125 £200 £350	

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Table A – Proposed Pricing Strategy

Hayling Central

Characteristics	• District centre • Provides convenient day to day shopping function • Main provider of parking
Parking Offer	• On street limited waits – 31 spaces • Off street limited wait bays – 24 spaces • HBC owned off street – 270 (charges apply)

Car Park	Characteristics	Survey Results	Proposed Strategy	Current Income	Average Numbers Parked	Pricing Options		Financial Implications
Elm Grove (100 spaces)	• Located close to shops • Offers 12 free limited wait bays (20 mins) • Free bays enjoy quick turnover and are used regularly • Long stay	• 88% park for up to an hour • 62% of those above park for less than 30m mins • 50% parked for shopping • A further 20% parked to use the post office • The bank & hairdressers featured regularly in reasons for parking here	• Provide flexible offers which cater for motorists visiting local amenities and all day option for local workers	Predicted for 13/14 - £28k	29,759	½ hr 1 hour 2 hrs All day	50p 80p £1.50 £3.00	Potential annual income: £26k Loss: £2k
						Hayling Season Tickets		
						3 mth 6 mth 12 mth	£125 £200 £350	PLUS: Potential annual income: £2k Loss: £0.4k
Health Centre (129 spaces)	• Offers 12 free limited wait bays (20 mins)	• Not surveyed, but some stats	• Provide flexible offers which cater for motorists	Predicted for 13/14 - £19.5k	20,507	½ hr 1 hour 2 hrs	50p 80p £1.50	Potential annual

	• % of car park free for Health Centre patients • Long stay	provided by petition organisers: • 98% parking in Health Centre 'free' spaces were visiting HC	visiting local amenities and all day option for local workers.			All day	£3.00	income: £19k Loss: £0.5k
Mengham Lane (41 spaces)	• Usage has been affected by free parking at Rose in June site • Long stay	• 70% parked for shopping • 54% parked between 30 & 60 mins • 64% used car park due to its convenience	• In addition to the other Hayling car parks, further choice is offered through facilitating a 5 hr option for part time local workers.	Predicted for 13/14 - £13k	15,850	½ hr 1 hour 2 hrs 5 hrs All day	50p 80p £1.50 £2.50 £3.00	Potential annual income: £17k Increase: £4k
St Mary's (30 spaces)	• Free HBC car park owned Located a distance from shopping areas • Predominantly used by parents picking up school children • Otherwise under-used	• Not surveyed	• To remain a free car park	None	N/A			Keep Free

Table A – Proposed Pricing Strategy

Leigh Park								
Characteristics	• District centre • Only centre to have higher than average vacancy rate (shops) in HBC • Centre shift to east as significant closures at west end of town • Council is main parking provider although cheaper parking is available at eastern end of town (Lidl's) • Tidworth Road parking income has declined by 50% in last five years							
Parking Offer	• HBC managed off street (including Lidl's) – • On street limited wait – 16 spaces • Off street limited wait – 13 spaces (Greywell car park)							
Car Park	Characteristics	Survey Results	Proposed Strategy	Current Income	Average Numbers Parked	Pricing Options		Financial Implications
Greywell (151 spaces)	• Prime location, close to shops • Offers 13 free limited wait bays (30 mins) • Popularity has declined due to cheaper competition (Lidl's) • Long stay	• 86% using car park for shopping • 62% parked for less than 30 mins	• To provide parking offers which encourage motorists to participate in a variety of amenities, including an affordable parking offer for local part time workers	Predicted for 13/14 - £75k	80,836	1 hour 2 hrs 5 hrs	80p £1.50 £2.50	Potential annual income: £78k Increase: £3k
Tidworth (99 spaces)	• Significant fall in numbers parked and income levels over last five years • Long stay	• 43% parked for shopping • 20% parked to use library • 72% parked for less than an hour	• By providing competitive offers and choice to motorists to encourage presence in western end of centre	Predicted for 13/14 - £24.5k	29,458	1 hour 2 hrs 5 hrs	80p £1.50 £2.50	Potential annual income: £29k Increase: £4.5k
						Season Tickets		PLUS:

			• Season ticket options for local workers • An additional 13 free limited wait bays (30 mins)			3 mth 6 mth 12 mth	£125 £200 £350	Potential annual income: £1k Loss: £0.2k
Somborne Drive (94 spaces)	• Owned by Lidl managed by HBC • Cheaper pricing than HBC car parks • Lidl's offer refund for £5+ purchase from their store	• 24% parked due to cheaper charges • 94% parked for less than one hour	Lidl set strategy	£22k annual fee paid to HBC On average meters take £58k	77,482	1 hour 2 hrs	60p £1.00	Annual fee: £22k
Cowplain								
Characteristics	• District centre • Very limited retail provision • HBC main provider of parking in area							
Parking Offer	• HBC managed off street – 78 spaces • Free parking behind Lidl's store • Smaller number of individual free parking bays provided by local stores • On street limited wait – 11 spaces							
Car Park	Characteristics	Survey Results	Proposed Strategy	Current Income	Average Numbers Parked	Pricing Options		Financial Implications
Mission Lane (78 spaces)	• Offers 30 min charge • Income	• 66% park for less than 30 minutes	• To maintain and possibly increase short stay turnover	Predicted for 13/14 - £18.5k	29,616	½ hr 1 hour 2 hrs	50p 80p £1.50	Potential annual

	broadly unaffected over last five years or by most recent increase in February	• 67% park for shopping • 14% park for work / business	& footfall in centre • Provide affordable parking offer for local workers, ie a reduced all day charge to help avoid displacement into local residential areas & provide season ticket options			All day	£3.00	Increase: £1.8k
						Season Tickets		PLUS: Potential annual income: £1k Loss £0.2k
						3 mth 6 mth 12 mth	£125 £200 £350	

Financial Implications Summary:

- Predicted income for 2013/14 = £847,000
- Base budget for car parks 2014/15 = £900,000
- Base budget for season tickets 2014/15 = £35,000
- Predicted Pay & Display income if proposals implemented by 1st April 2014 = £900,500
- Predicted Season Ticket income (as per assumptions listed above) = £35,000

Total proposed income compared to base budget = +£500

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