Exeter City Council

A New Strategy for Parking 2016 - 2026

March 2016

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Foreword

By Cllr Rosie Denham, Portfolio Holder for Economy and Culture

"Exeter has ambitious plans to become the Regional Capital of the South West, placing a vibrant, successful City Centre at the heart of these plans. How people access the City Centre, their first impressions, where and how long they park for and how safe they feel are important elements of the City's success. The city's car parks and transport infrastructure contribute to the city's economic growth, delivering ease of access into the City Centre, encouraging people to stay longer and helping to support the development of the city's evening and night-time economy, further strengthening the cultural vibrancy of the City Centre."

CLLR ROSIE DENHAM
Portfolio Holder for Economy and Culture, Exeter City Council
March 2016

Executive Summary

Exeter City Council has an extensive portfolio of car parks in the City Centre and in key local retail centres. The Council is keen to see its car parks contributing to the economic growth of Exeter and to optimise existing parking capacity in the city and reduce congestion whilst maintaining an important income stream.

WSP Parsons Brinckerhoff were commissioned by Exeter City Council in August 2014 to provide professional consulting advice and services for its City wide review of off-street parking. This included qualitative, operational and capacity reviews of the car park and tariff modelling as well as perceptual assessments from stakeholder and car park user workshops.

The Strategy considers for Exeter and Topsham the current and projected future position on the demand for and supply of parking, parking operations and tariffs, the condition of the City Council's car parks and their potential for improvement.

Stakeholders highlighted that it was hard to find a parking space at peak times, that there was poor directional and live capacity information about the city's car parks and that payment options were limited. They were particularly concerned about congestion and there was strong support for more Park and Ride Services.

A key issue to be addressed by the Strategy is parking capacity in the City Centre on Saturdays, which is predicted to reach full capacity by 2018. Weekday capacity is around 60%, with only 23% of this being commuter parking and the rest mainly short-stay use. Demand for evening parking is predicted to increase.

In terms of parking charges, there is an anomaly between Exeter's long stay and short stay parking offers. There are no short stay restrictions in the long stay car parks and nor do the charges discourage short stay users from using long stay car parks: charges are cheaper in long stay for the same amount of parking time. This makes Exeter significantly cheaper than comparable cities for shorter stays. In addition, Exeter is unlike most comparable cities in not charging for evening parking.

The City Council's car parks vary considerably in their condition, look and feel, which influences where people prefer to park and adds to congestion. Not all the Premium car parks score highly in terms of quality and the use of Cathedral and Quay car park suggests that it is a last choice for most drivers. There is scope for limited development on some existing car parks which may increase the number of spaces overall and Triangle Car Park offers a prime location for a new high-quality multi-storey.

Improved signage is needed to help visitors navigate to and around the City Centre car parks and in particular the area around Princesshay. Real time information on parking space availability, Park and Ride bus times and journey times into the City Centre needs to be improved.

The Council will look to make changes to the current pricing and tariff structure, signage, evening offer, opening times and charges, improve the condition and look and feel of its car parks, seek to increase the number of parking spaces, work with restaurants and retailers on joint promotions and support the County Council to encourage alternative forms of travel.

The Action Plan on Page 54 sets out the proposed timescale and priority for these interventions. The impact of the Strategy will be measured in terms of increased dwell time, increased Sunday parking demand and modal shift. Other more operational measures will also be monitored.

Policy Context

NATIONAL PARKING POLICY

The Government's National Planning Policy Framework was published in March 2012 and set out the Government's planning policies for England and how these are expected to be applied. This advice supersedes the more definitive advice within former Planning Policy Guidance (PPG) notes and Planning Policy Statements (PPS) including PPS3 Housing; PPG6 Town Centres and Retail Development and PPG13 Transport.

The National Planning Policy Framework sets out a series of parking related objectives to:

- Reduce the dependency on the car in favour of more sustainable forms of transport;
- Set local parking standards that reflect local conditions and transport objectives;
- Improve the quality of parking in town [and City] centres and set appropriate parking charges so as to support the vitality of the town [and City] centre.

LOCAL PARKING POLICY

Many policies relating to Planning and Transportation are relevant to Local Parking Policy. The future development of the City and its wider environs, its economy, including evening economy, tourism and its Vision including Principle 9 to improve sustainable travel, have been reviewed in the context of the Parking Strategy.

Local Parking Policy has the challenging aim to balance the needs of a thriving City (for commuters, tourists, shopping, education and leisure trips, including the evening economy), with a supply of parking that is affordable for those where the alternative travel options are limited and not convenient, whilst fitting into policies that encourage sustainable travel, and operating at least at cost neutral status, and more ideally as a revenue resource for the Council.

Single occupancy car travel is one of the least sustainable ways of travel in terms of energy and utilisation of highway space per person, but cannot currently be influenced by parking operation other than through the tariff where the car rather than the occupant is the basis of charge. Car travel, as for other vehicles, detrimentally contributes to air quality issues, which is influenced by particulates emitted from diesel engines and congestion, as well as other factors such as topography and air flow.

Exeter City Council is seeking growth that will support a sustainable Central Area and to protect its special character by helping tackle associated issues that impact on quality of life such as air quality. The Council supports the Local Transport Plan 3 (LTP3) Objective 6 of seeking to achieve a step change in public transport to reduce travel demand by car, and also measures which might minimise the need to travel. However, not all Core Strategy growth in demand can be accommodated by sustainable transport and trip reduction alone, so car parking will retain an important role in providing good access to the Central Area which is seen as crucial to the future prosperity of Exeter.

The Core Strategy seeks strategies to encourage reduced car reliance and suggests parallel action to reduce the relative attractiveness of car use.

Improving bus services and supporting 'Park and Ride' expansion are set out in policy documents, with four possible new 'Park and Ride' (P&R) sites identified to serve the West, East and North; and South West in addition to the current three sites to the East, South East, and South. The role of P&R is aimed at longer stay car parking, reducing the car element of commuter and day trips into and out of the Central Area at the most congested times.

Encouraging diversification of development within the Central Area through the Core Strategy should nurture more self-contained, shorter journeys which are likely to be made by foot or bicycle as the distances are small and car use would be less attractive.

PLANNED DEVELOPMENT AND GROWTH ASSUMPTIONS

The growth assumptions in this Strategy have been informed by the adopted Exeter City Council Core Strategy (February 2012); the emerging Exeter City Council Draft Development Delivery Options Document (Consultation Version, December 2013) and discussions with Exeter City Council officers for key developments as well as predicted visitor numbers and tourism trends.

CORE STRATEGY AND STRATEGIC HOUSING LAND AVAILABILITY ASSESSMENT

The Core Strategy quantifies growth expectations, including broad locations where that growth is anticipated (e.g. Central Area, Urban Extensions etc.). The Strategy does not identify specific sites or how the growth will be delivered. This will be set out within the Development Delivery Plan which is yet to be adopted although a draft was published for public consultation and representations during December 2013 and a Publication version was published for comment in July 2015 but has not yet been submitted to the Secretary of State for Examination.

In parallel with the Core Strategy, the Council has responsibility for housing delivery to meet future need, and it reviews and monitors growth in housing via the Strategic Housing Land Availability Assessment (SHLAA) and Authority Monitoring Reports (AMR), published annually and setting out completions to date and expectations for the future trajectory of growth.

Any growth is important, since it could drive an increase in car parking demand, as follows:

- Increases in the retail, leisure and tourist draw (through an expansion in destination land uses) can be expected to increase the attractiveness of the Central Area as a destination;

- Increases in office land uses within the Central Area may also increase demand for car parking;
- A rise in the catchment population within reasonable drive time of Exeter is likely to help drive increases in demand to travel to the Central Area (subject to the growth in destinations/ attractiveness there).

This is likely to have a distance decay function and depend on the degree of competing non-residential development elsewhere to the Central Area. For example, residential growth in urban extensions on the edge of Exeter and within ECC's administrative area and within urban extensions and new communities on the city fringes can be expected to have a much greater and more significant impact on demand than growth further afield within Devon or beyond (e.g. major planned housing growth in Newton Abbot).

POTENTIAL CONSTRAINTS TO FUTURE GROWTH IN CAR PARK USE

Whilst the above may be seen as potential drivers of additional demand in terms of land use and attraction of the Central Area, it is also recognised that car parking forms only one part of the transport system (and ECC and NCP off-street car parks only one component of the car parking stock with the significant capacity of on-street and Private Non-Residential parking as well as residential parking further out from the Central Area). Growth in demand may well, in reality, be constrained or tempered by the following:

- Heavy congestion on arterial routes into the Central Area, particularly at peak times, but also during other parts of the day. This may discourage some from driving to the Central Area, particularly if LTP planned and promoted alternatives to driving are delivered and on balance are sufficiently attractive and able to compete in terms of cost, time and convenience (e.g. metro rail improvements, cycle route improvements, possible P&R expansion). Alternatively, there is a risk that, contrary to ECC's Strategy of focussing major trip attractors within the Central Area, if competing edge or out of town growth comes forward that people may choose this over the Central Area for some purposes
- Work to date suggests that in reality, at the time of the 2010 Car Parking Study undertaken by WSP Ltd for Exeter City Council, ECC car parks may have a relatively limited role in providing long stay car parking for commuters at present (with the exception of P&R), as a result of relatively high long stay charges, some remaining free on-street parking opportunities in surrounding areas and the availability of Private Non-Residential (PNR) car parking. The third LTP (2011) published by DCC estimates around 3,000 PNR parking spaces within the Central Area, which is slightly more than half the number of publicly available off-street parking available via ECC and NCP car parks and therefore expected to contribute to congestion (especially peak hour congestion) more than the ECC spaces which show much higher demand / accumulation during the middle of the day, as compared to the highway peak arrival and departure times
- It must be recognised, of course, that any future B1 office development within the Central

Area may come forward with greater restraint on new car parking provision than was historically the case and therefore such development may be more reliant in future on public transport and/or public car parking than for past developments.

- The travel to work area is expanding, with more people travelling further distances to work in Exeter. The opening of the South Devon link road is expected to increase this number.

GROWTH TRAJECTORY

Table 1 Core Strategy Housing and Population Growth Trajectory

Year	Estimated population growth (in year)	Estimated population growth (cumulative)	Estimated population total*	Annual housing completion (in year)* - SHLAA	Cumulated housing forecast – SHLAA
2013/14	-	-	120,905	-	-
2014/15	1875	1875	122,779	783	783
2015/16	1544	3419	124,324	645	1428
2016/17	1669	3213	125,993	697	2125
2017/18	1954	3623	127,946	816	2941
2018/19	1540	3493	129,486	643	3584
2019/20	2174	3714	131,660	908	4492
2020/21	2023	4197	133,683	845	5337
2021/22	1379	3402	135,062	576	5913
2021/23	1027	2406	136,089	429	6342
2023/24	845	1872	136,935	353	6695
2024/25	1300	2145	138,235	543	7238
2025/26	1822	3122	140,057	761	7999
* Based on extrapolating from 2011 Census data of 117,773 residents, assuming an average of 2.3943 residents per dwelling and based on housing completions and forecast completions from the 2013 Revised SHLAA (Appendix 4).					

Table 1 above shows the Housing and Population Growth Trajectory based on the Core Strategy which suggests a population increase of 19,000 or 16% from 2014 to 2026. Whilst detailed SHLAA data has not been consulted for Teignbridge or East Devon the following broad build-out profiles for the period 2014 to 2026 could be assumed approximately 450 dwellings per annum at Cranbrook from 2014 to 2026 (total 5,400 dwellings); and approximately 250 dwellings per annum at South West Exeter from 2016 to 2026 (total 2,500 dwellings).

KNOWN AND ANTICIPATED CITY CENTRE DEVELOPMENTS

Recent and current City Centre development includes the John Lewis extension of floor-space (2012), a Premier Inn at Southernhay and the Guildhall replacement of retail area for restaurant use (2015/16).

The anticipated development includes the Bus Station re-development with the swimming pool and leisure proposals as part of the Bus Station re-development reviewed below; and the Bus Depot re-development, which is a site adjacent to the bus station. Planning permission has been granted for the Bus Station site subject to a planning obligation, so for the purposes of the Strategy this has been included in the technical calculations that support the Strategy predictions.

RE-DEVELOPMENT OF EXETER BUS STATION

For the purposes of the analysis that underpins the technical advice to the Strategy, the re-Development of the Bus Station has been included within the development proposals. This re-development will be an important Central Area development. The Council has resolved to grant planning permission subject to a planning obligation, and it is understood that with an anticipated opening year of 2018.

There are net changes in land use, car parking supply and demand and alterations to routing within the City Centre affecting routes to different car parks from some areas. The re-development will close Bamfylde Street Car Park (88 spaces) as well as 90m of on street parking and remove on street parking on Bude Street and Belgrave Road. The Coach parking will be re-located from the bus station and the National Express intercity buses will move from their existing bays in the bus station to on-street in Bampfylde Street with a further loss of on-street parking. In addition to the parking which will relocate to other areas, the development itself increases the demand for parking as a result of the net increase in development land uses.

The closure of Bampfylde Street car park and existing development uses is assumed to happen with anticipated construction start date of 2016, with the new businesses open in 2018.

Paris Street (which is part of the B3183), will be closed to traffic at its northern end, no longer providing vehicular access to Sidwell Street and the High Street. The Street will effectively end at the access to the Princesshay car parks at Southernhay.

As a result of the closure of Bampfylde Street car park, twinned with the closure of Paris Street, the traffic that currently enters and exits Bampfylde Street Car Park from the north and west (York Road) will most likely divert into John Lewis Car Park, and traffic from the north and east Blackboy Road/Old Tiverton Road) will most likely divert to the Triangle Car Park. Traffic from the east (Heavitree Road) and south (Western Way) could use the Princesshay Car Parks or other car parks on route such as Magdalen Road or Triangle. The capacity analysis later in this document shows that there is some limited capacity in most of these car parks to absorb the impact of the closure of Bampfylde Street Car Park.

The closure of Paris Street as a through route will make the three Princesshay car parks less easy to access from the North and West, and John Lewis, King William Street and Howell Road less easy to access from the South.

SUSTAINABLE CITY CENTRE / HEALTHY LIVING / PRINCIPLE 9 / AIR QUALITY

The Sustainable City, Healthy Living and Principle 9 (of Exeter's Vision Partnership) relate to the City becoming a beacon for healthy living through encouraging more pedestrian, cycle and public transport use as part of the solution to travel. Principle 9 seeks further pedestrianisation of the central area, and removal of cross City traffic to make the central area more attractive to visitors. Use of sustainable modes of travel will in turn help to improve the air quality by reducing traffic in the City Centre.

Exeter City Council, along with other organisations represented on the Exeter and Heart of Devon Low Carbon Task Force, recognises the benefits of electric vehicles in reducing harmful emissions and improving local air quality. It has adopted an Electric Vehicle Strategy, to encourage the use and ownership of electric vehicles as one element of a sustainable transport package. Exeter City Council has already installed charging points for electric vehicles in a number of its car parks and a programme of installation of solar panels and LCD lighting in its car parks was completed in December 2015.

Where possible, opportunities to include actions to help reduce carbon emissions from vehicles travelling to and from the ECC car parks and/or in terms of operation of the car parks themselves, will be considered particularly where this generates cost savings and/or can be incorporated in a cost effective manner.

TOURISM AND VISITORS

Exeter City Council's Economy and Tourism Manager has provided the latest available data on visitor arrivals and spend for Exeter. Information on visitor trips to Exeter (referenced within the Exeter Visitor Strategy from data obtained from Cambridge Economic Impact Assessment) shows that in 2014 there were 1.6M day visitors; 0.45M overnight visitors, with the vast majority (75%) on holiday, or (14%) visiting friends or family, with 7% business trips and 4% to study.

The visitor spend is estimated to be £181M per annum: 27% on shopping, the same on food and drink; 22% on accommodation; 13% on travel and 11% on visiting attractions and entertainment.

The trend in visitor growth fluctuates but on average suggests 0.9% growth per annum which has been applied to the modelling and analysis that underpins the Strategy.

Strategic Objectives

- **ECONOMIC GROWTH**

  Exeter has ambitious plans for economic growth over the next 20 years. The City's vision is "*To establish the Exeter city-region as one of the UK's leading knowledge economies, attracting significant investment, creating sustainable high quality employment and raising income levels for the benefit of its residents and businesses.*"

  Exeter is a motor for job creation. In the 10 years to 2014 the number of people employed in Exeter rose by nearly 30,000 (34%) and inward commuters now make up around 35% of all employees in Exeter. Over the next 15 years, productivity per job in Exeter (26%) is expected to rise almost three times as fast as the rise across the LEP Heart of the South West area (9%). Exeter seeks to compete as an office location, particularly given the role of office staff in generating lunchtime and early evening trade and enlivening the streets, cafes and shops of the City Centre;

  Retail growth is key to the success of our thriving city and Exeter is already the premier shopping destination in the peninsula. The City has ambitions to create an '18 hour' City by extending the City's evening economy and leisure offering.

  Competition from out of town shopping centres remains a threat and Exeter is working hard to become a destination of choice, combining a superb retail offer with a strong heritage, culture and leisure offer. Car parking is an important element of this growth story and it is essential to ensure that the City Council's car parks support economic growth by encouraging visitors to stay longer when they visit the city.

- **MAXIMISING CAPACITY**

  The existing use of the off-street car parks is markedly different between weekday, Saturday and Sunday. On Saturdays, the car parks are close to full capacity with the maximum overall use at 88%, and nine of the 24 central car parks at or over capacity. Critically, projections show that actual capacity in Exeter's city centre car parks will be reached on a Saturday by 2019, and by 2018 if the redevelopment of the Bus Station goes ahead as planned.

  Sunday use is around 60% of that of Saturday and during the working week there is considerable spare capacity in the central area car parks, although this varies between car parks and will not be the general perception at some locations.

  This Strategy will seek to address the critical issue of Saturday parking capacity and to increase demand for parking spaces during the rest of the week.

- **REDUCING CONGESTION**
  Traffic congestion is seen by stakeholders as a key deterrent to accessing the City Centre, and therefore limits parking demand. This implies that reducing congestion would increase demand for parking from suppressed trips.

  Exeter City Council supports the Local Transport Plan 3 objective of seeking to achieve a step change in public transport, to minimise the need to travel and to reduce travel demand by car. However not all demand can be accommodated by sustainable transport and trip reduction alone, so car parking will retain an important role in providing the good access to the City Centre and is seen as crucial to the future prosperity of Exeter.

- **MAINTAINING INCOME**
  The City Council depends on the £6M income it receives from its car parks service every year to deliver a balanced budget and provide essential services. It is imperative that any changes to the parking offer as a result of this strategy at least maintain current income levels.

  Operating the car park portfolio requires significant investment as well as year on year maintenance to provide users with the level of service that they expect. It is essential that appropriate funding is available for on-going maintenance, refurbishment and renewal programmes and it may be necessary to increase overall income from car parking to fund this investment and ensure that an income stream is maintained for the long term.

Stakeholder Views

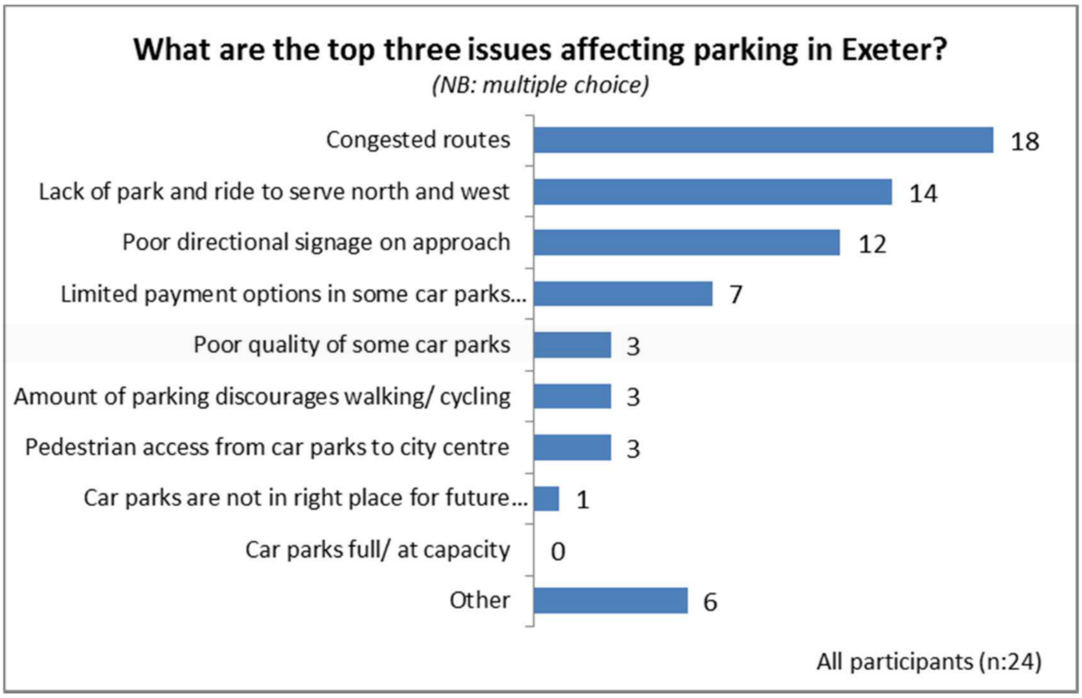
Engagement of local opinion and perception was very important for the successful analysis of this Parking Strategy, both to inform and influence the Strategy and to allow stakeholders a better understanding of the requirements and needs of the Council.

STAKEHOLDER WORKSHOPS

Around 70 stakeholders were invited to the workshop in November 2014, including representatives from a range of local businesses, organisations and groups such as Chamber of Commerce, Federation of Small Businesses, Princesshay Shopping Centre, Guildhall, John Lewis, NCP, APCOA, University of Exeter, Cultural Partnership, Phoenix Centre, Living Options Devon, hoteliers, Exeter St. James Forum, Royal Mail, Mecca Bingo, Ernst and Young, Stagecoach and Devon County Council.

Figure 1 summarises the most important issues to these stakeholders:

Figure 1: Stakeholders: Top Three Issues Affecting Parking in Exeter



The Stakeholders also felt:

- that that there is sufficient parking to meet current demand
- additional capacity is required to support the growth and development aspirations for Exeter, particularly in the South, East and West of the City;

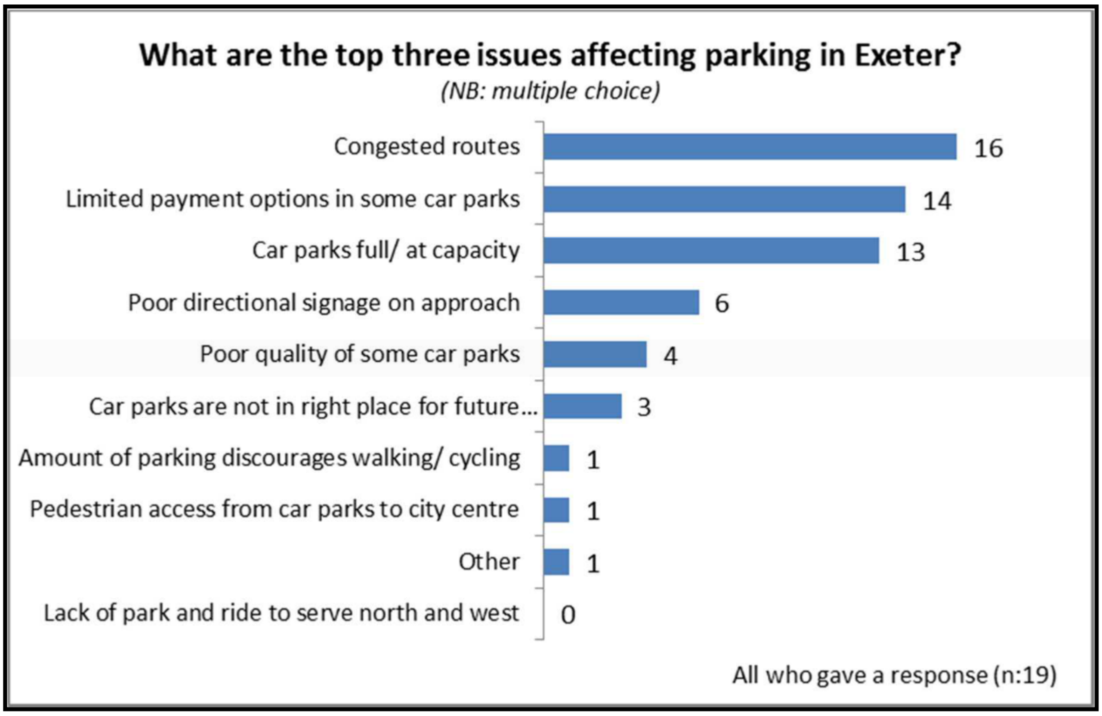
- positive about the condition of off-street car parks in Exeter, recognising that there is room for improvement in some car parks;
- The parking pricing/tariff structure needs to be given careful consideration to encourage shoppers/leisure users into the City and to increase the duration of their stay;
- Parking is intrinsically linked to the wider transport strategy, for example, stakeholders strongly support the need for improved public transport links to take the pressure off the road network;
- On and off street parking should be managed as one overall supply
- The Parking Strategy must consider potential changes to land use within the Central Area and how to respond to the changing face of the High Street

PARKING USER FOCUS GROUPS

In addition to the stakeholder workshop, parking users were randomly selected by specialist market research recruiters according to set socio-demographic criteria (gender, age, Socio Economic Group, area, working status and ethnicity) to ensure a good balance and broad geographic spread of respondents was achieved.

Figure 2 summarises the most important issues to these parking users:

Figure 2: Parking Users: Top Three Issues Affecting Parking in Exeter



Of particular interest is the perceived focus of the Parking Strategy which, as summarised in Figure 3 below, suggests "*making better use of existing facilities (quality, pricing, information), but no new provision*", though a significant number thought "*new central area parking*" was needed as well as "*additional P&R facilities*".

Figure 3: Parking User Focus Group: Direction of Parking Strategy

In summary, the selected parking users thought:

- Location, cost and payment type are the key considerations when selecting a parking location
- Lack of signage makes it difficult for visitors to navigate the Central Area. The current lack of signage/ information about the smaller car parks causes traffic congestion around Princesshay as drivers do not venture further afield to park
- There is strong demand for better information about the car parks; there is felt to be a need for live information, whether delivered through improved VMS or a Smartphone app.
- Commuter parking / employees need to be better provided for;
- The tariff structure needs to be given careful consideration to encourage shoppers/leisure users into the City and to increase the duration of their stay
- The current price differential between the different car parks is not considered significant enough and there is confusion over the current car park classification system. There is a feeling that longer stay parking in the City Centre should be cheaper, particularly in the outer, less popular car parks
- Payment mechanisms are key to duration of stay: pay & display limits the time spent in the Central Area. There is support for a pre-pay “Oyster” card scheme which could be used for parking, public transport, P&R;
- There is demand for parking promotions with restaurants/retailers and/or a loyalty card system;
- There is strong support for significant improvements to public transport to reduce car use

and congestion and most feel that the Parking Strategy should encourage people to think twice about their car use

- There is a general feeling that P&R, including rail-based P&R, should play more of a role in Exeter's future, with more sites serving different locations.

TOPSHAM COMMUNITY ASSOCIATION FEEDBACK

Feedback from the Topsham Community Association requested consideration be made of the following:

- Conversion of Topsham Quay to a medium/long stay car park rather than short stay as it serves recreational users (boaters, birdwatchers, hikers, cyclists) far more than shoppers
- Residents parking permits for Topsham car parks, prioritising those without house frontage
- The impact of proposed loss of the "T" bus service which the Association considers is likely to lead to more car journeys from Countess Wear to access the Doctor's surgery and other amenities
- Potential for allowing long stay durations of several days at Tappers Close for those travelling away to compliment adjacent railway station
- Is extra land available for parking at allotments or rugby club?
- Consideration of the influence of free on-street parking;

Key Stakeholder issues

- Reducing congestion would increase demand from suppressed trips
- Strong support for enhanced and additional Park and Ride services
- Poor directional and live capacity information about car parks
- Limited payment options in some car parks
- Hard to find a space at peak times

Parking Supply and Demand

Within the Central Area, Exeter City Council manages thirteen surface, two underground, and six multi-storey off-street car parks totalling 4,112 parking spaces. This includes 119 disabled spaces. 361 spaces are reserved for permit parking on weekdays and 145 spaces at the weekend. National Car Parks (NCP) operate a further two multi-storey and one underground car park totalling 573 spaces. Other operators including Total Car Parks, APCOA and Premier Park offer around another 660 spaces. Devon County Council through its Local Transport Plan estimate that there are 3,000 off-street Private Non-Residential (PNR) parking spaces in the City Centre, suggesting that the City Council controls just over a half of the off-street parking supply in the centre.

On-street parking is managed by Devon County Council and there is a significant supply of around 500 mainly pay and display parking spaces around the city centre, with some disabled parking areas and loading bays. Further out from the centre, there are 20 residents' on-street parking zones operated by Devon County Council, with some allowing permits for business and visitors including hotel guests.

Outside the City Centre, Exeter City Council operates four surface off-street car parks in Topsham totalling 152 spaces, and an off-street car park in Heavitree which has 38 spaces.

There are three Park and Ride (P&R) sites to the East, South East and South of Exeter. Matford P&R, to the South) is operated by Exeter City Council with 451 spaces (120 additional bays in an overflow area were lost to development in late 2015). The other two P&R sites totalling 1,250 spaces are operated by Devon County Council. In context, Park & Ride adds a further 21% of parking stock to the City.

CITY CENTRE

The existing use of the off-street car parks is markedly different between weekday, Saturday and Sunday and is highest on Saturdays where it is currently close to practical capacity.

Sunday use is around 60% of that of Saturday and during the working week there is considerable spare capacity in the central area car parks as shown in Figure 4 below, although this varies between car parks and will not be the general perception at some locations.

CITY CENTRE SATURDAYS

The car parks are already close to capacity on Saturdays as shown in Figure 4 below, with the overall use at 88% of capacity when at maximum usage. 14 of the 23 central area car parks are over practical capacity (90%), with nine of those at or over capacity.

The maximum uses of those with spare capacity on a Saturday were:

- NCP Summerland Gate 89%
- Parr Street 88%
- King William Street (formerly Leighton Terrace and Annexe 88%
- Triangle 87%
- Okehampton Street 84%
- Cathedral & Quay 77%
- Magdalen Road 77%
- Haven Bank 74%
- Princesshay 2 58%
- John Lewis 37%

Figure 4: Saturday Parking Profile by Hour of Day

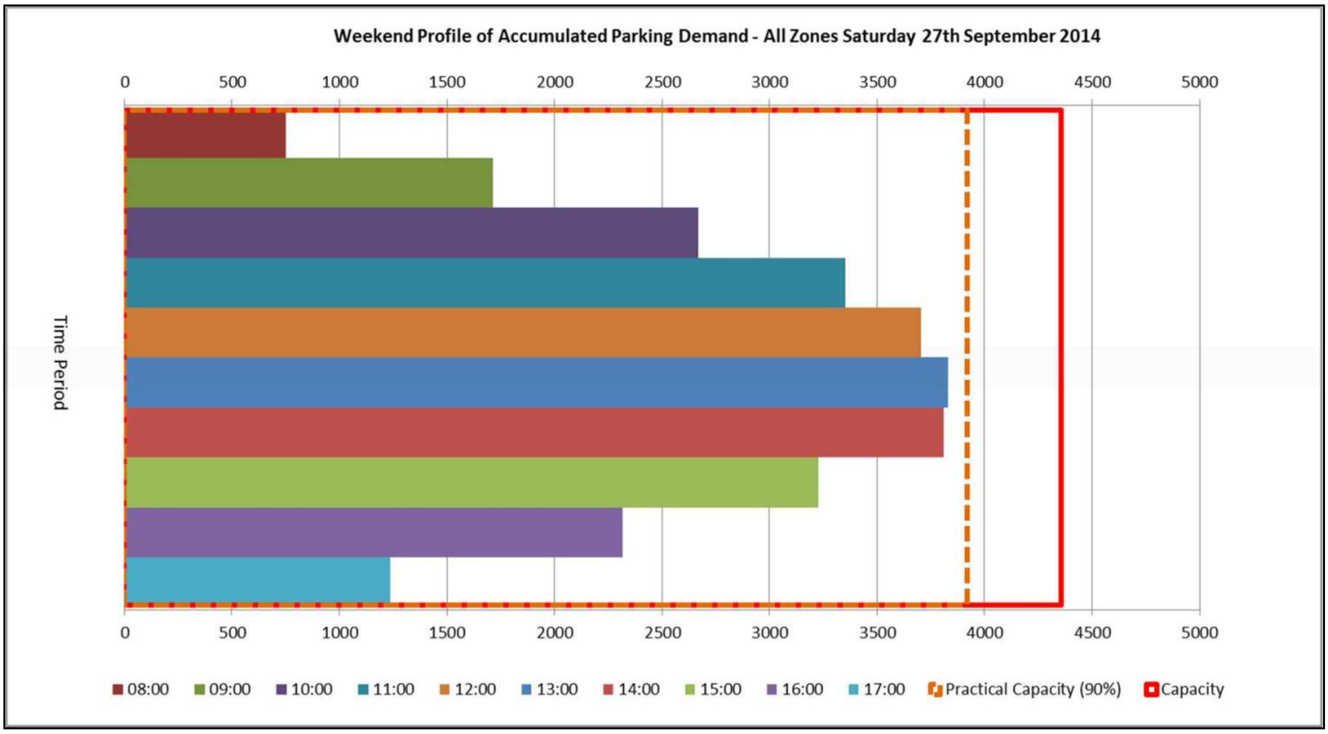
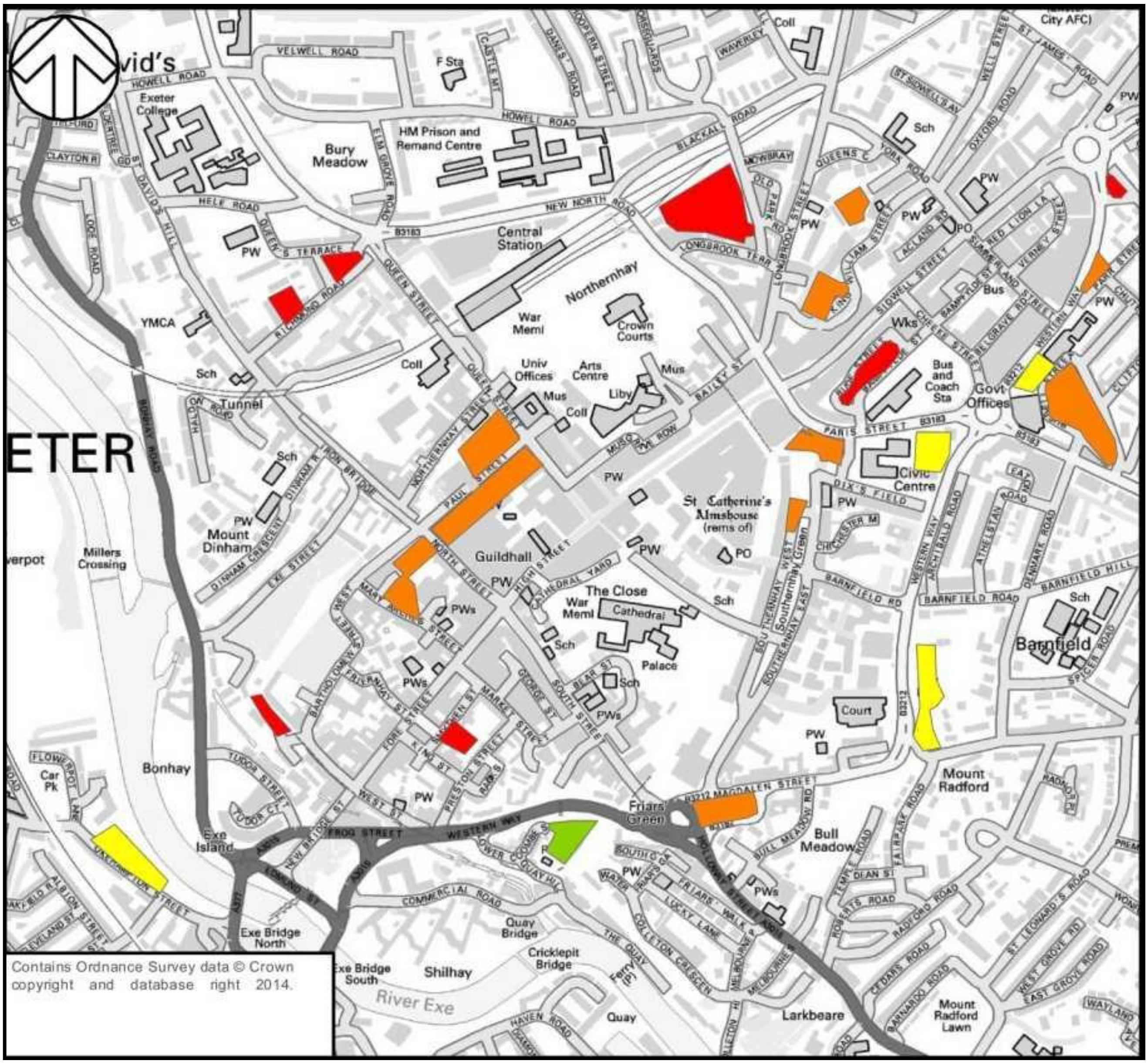


Figure 5 below shows that on Saturdays in central Exeter many car parks are at practical or actual capacity.

Figure 5: Car Park Utilisation on Saturday (September 2014)

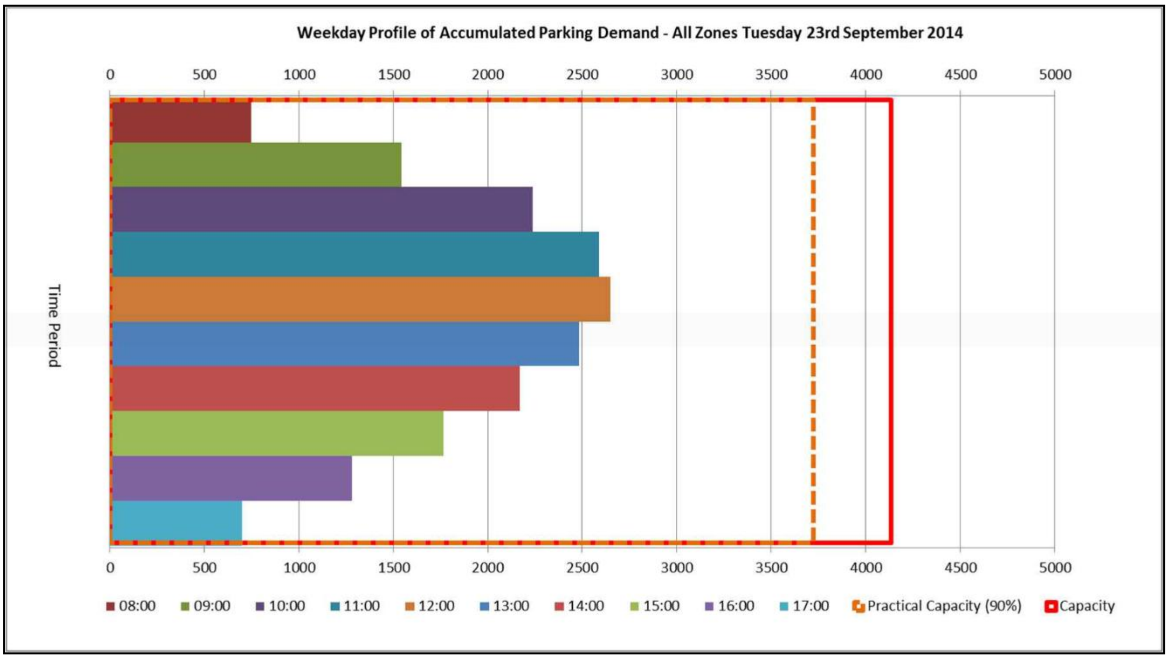


The future growth predictions for Exeter's Core Strategy with the addition of growth from Cranbrook to the East of the City and the South West Exeter developments, **suggest that Saturday city centre car parking will run out of capacity in 2018**. Without the addition of Cranbrook and South West Exeter, which add a significant population to the area, the absolute parking capacity may stretch a further three years till 2021. However parking is at its practical capacity now which means a proportion of cars will have to drive to more than one car park to find a space with added journey time and potential for more queuing and congestion for other road users.

CITY CENTRE WEEKDAYS

During the working week as shown in Figure 6 below, overall there is considerable spare capacity in the city centre car parks but this varies between car parks and will not be the general perception at some locations. Sunday use is around 60% of that of Saturday.

Figure 6: Weekday Parking Profile by Hour of Day



Individual car parks that are experiencing demand approaching or in excess of practical capacity during the weekday peaks are as follows:

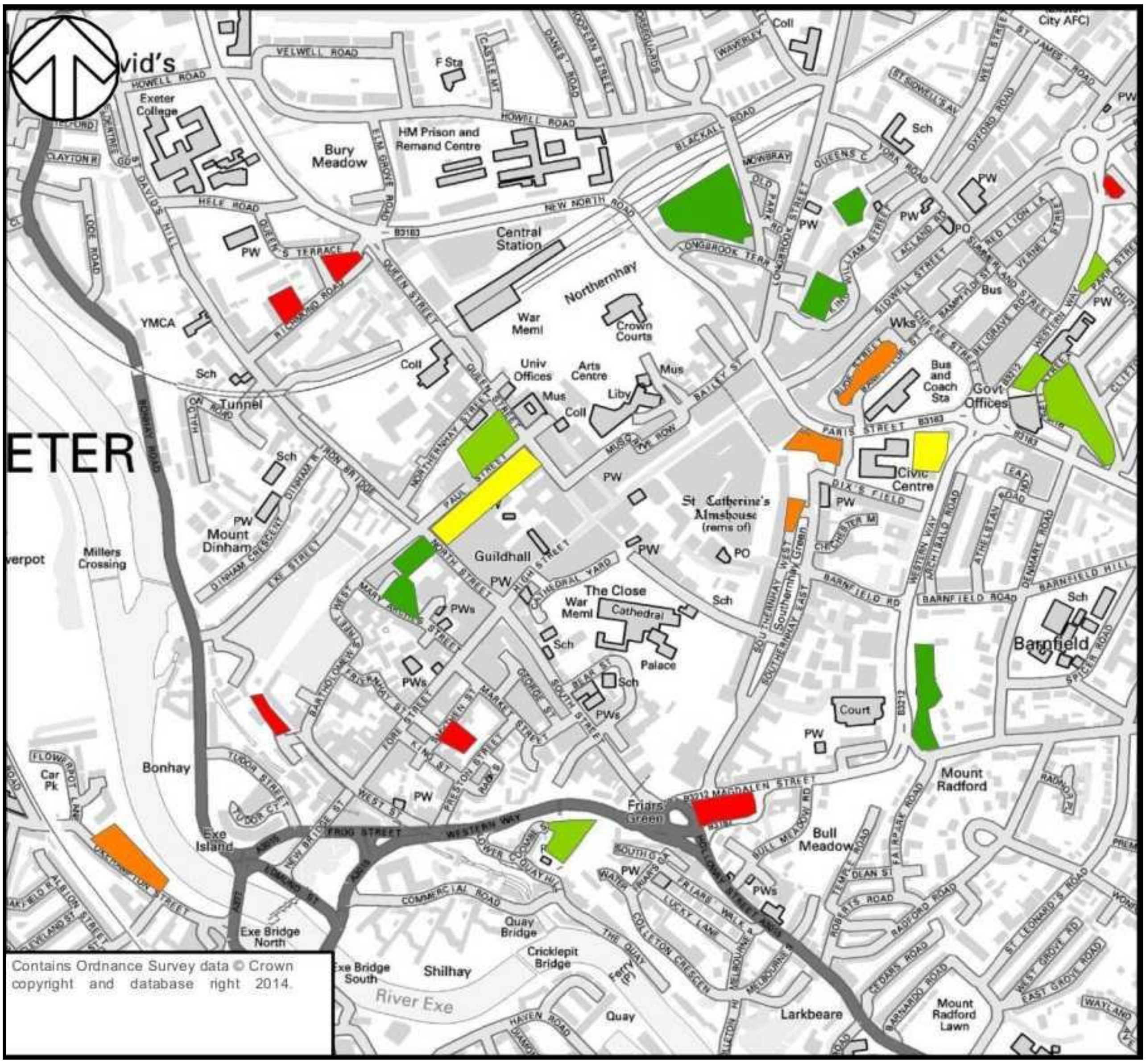
- Belmont Road 137%
- Bystock Terrace 112%
- Bartholomew Terrace 107%
- Richmond Road 106%
- Smythen Street 106%
- Princesshay 102%
- Magdalen Street 102%
- Princesshay 3 96%
- Bampfylde 94%
- Okehampton Street 94%
- Guildhall 90%

Car parks that have considerable spare capacity during the weekday are as follows, noting only those that have less than 50% of maximum use at their highest usage point during the day:

- John Lewis 37%
- King William Street 34%
- Haven Banks 15%

The map of central Exeter at Figure 7 below shows the car parks that are at and over capacity at the peak demand part of the day (usually around mid-day), and those which are at and over operational capacity.

Figure 7: Car Park Utilisation on Weekday (September 2014)



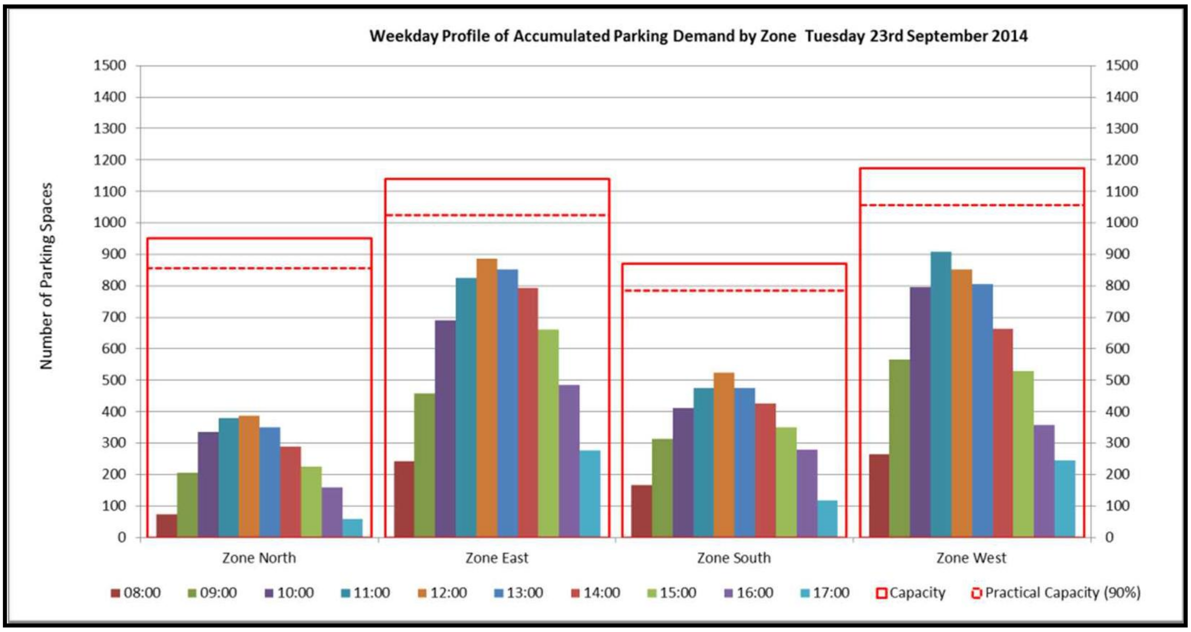
PARKING BY QUADRANT (ZONE)

Car park capacity in the City Centre has also been analysed by quadrant: approximately North, South, East and West.

NORTH	EAST	SOUTH	WEST
• Howell Road • John Lewis • King William Street	• Bampfylde • Belmont Road • Parr Street • Princesshay (NCP) • Princesshay2 • Princesshay 3 • Summerland Gate • (NCP) Triangle	• Cathedral & Quay • Dean Clarke House (PPS) • Haven Banks • Magdalen Road • Magdalen Street • Market Street (NCP) • Smythen Street	• Bartholomew Terrace • Bystock Terrace • Central Station (APCOA) • Flowerpot (Premier Park) • Guildhall • Harlequins Centre • Isca Place (Premier Park) • Mary Arches Street • Okehampton Street • Richmond Road • St Davids Station (APCOA)

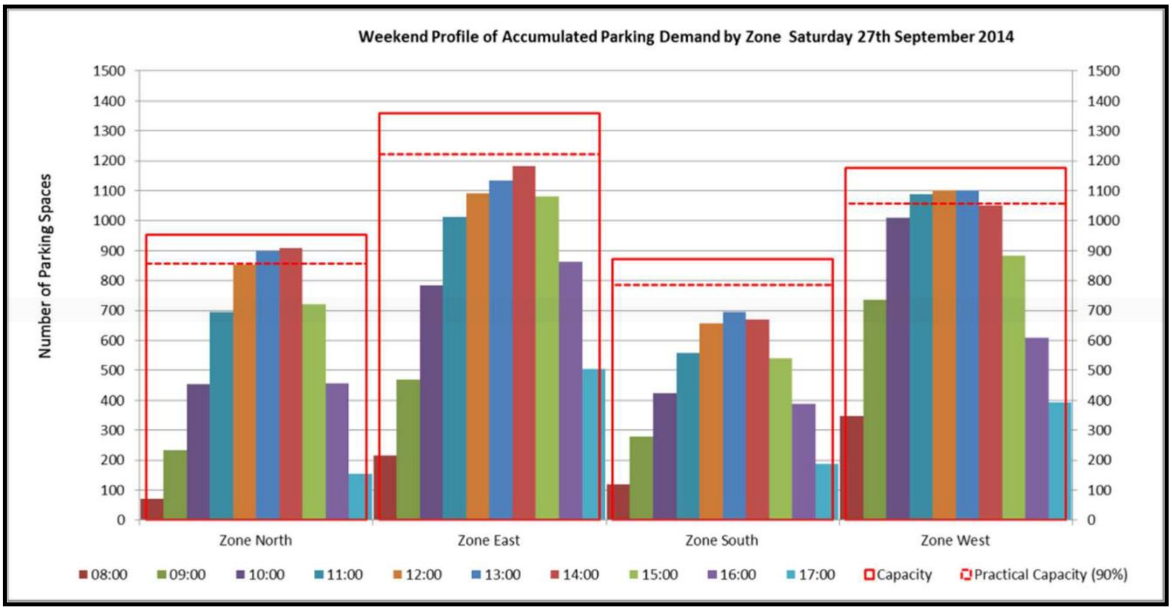
Although there is very high use on Saturdays, the zonal assessment shown in Figure 8 below suggests the maximum parking use in the North and West zones are over 90% capacity and therefore at practical operational capacity but that the East and South zones have some spare capacity.

Figure 8: Saturday Parking Profile by Hour of Day by Zone



On weekdays, demand is highest in the East and West zones, with the North Zone having the lowest use.

Fig**ure 9: Weekday Parking Profile by Hour of Day by Zone**



OPENING HOURS BY LOCATION

Table 2 below shows that 10 of the 24 city centre parks are open 24/7, which represents just over a quarter of the overall supply. Just over half the parking supply is available till 11:30 p.m. each evening.

Table 2 Central Area Car Park Capacity by Hours of Operation

	ZONE				
CAR PARK BY OPENING HOURS	EAST	NORTH	SOUTH	WEST	TOTAL
24 hour	426	337	362	612	1737
Bampfylde Street	88				
Belmont Road	27				
Bystock Terrace				50	
Central Station				47	
Dean Clarke House				160	
Flowerpot				70	
Howell Road		337			
Magdalen Road			213		
Magdalen Street			100		
Okehampton Street				81	

Parr Street	41				
Smythen Street			49		
St Davids Station				204	
Triangle	270				
7am to 2am	503				503
Princesshay (NCP)	264				
Summerland Gate (NCP)	239				
7am to 12am				470	470
Mary Arches Street				470	
7am to 11.30pm	171				171
Princesshay 3	171				
7am to 11pm	347		395	91	833
Cathedral & Quay			395		
Harlequins				91	
Princesshay 2	347				
7am to 9pm		244	70	440	754
Guildhall				440	
King William Street		244			
Market Street (NCP)			70		
7am to 8pm			176		176
Haven Banks			176		
7am to 7pm				275	275
Isca Place				275	
8am to 8pm		425			425
John Lewis		425			
8am to 6pm*				97	97
Bartholomew Terrace				46	
Richmond Road				51	
TOTAL					5441

Note * Bartholomew Terrace and Richmond Road are closed for public parking at 6pm but allow residents parking with permits to park 24 hours a day.

LONG AND SHORT STAY PARKING

City Centre ticket sale information, excluding permits and pay-by-phone information on a typical weekday and Saturday shows the overwhelming use of both short and long stay parking provision by shorter stay users. 66% of long stay parking provision is being used by parking for up to 3 hours on a weekday and slightly more (71%) on a Saturday. The comparative short stay parking information indicates 88% of short stay car park users park for 3 hours or less and 62% park for 2 hours or less.

Parking of over 5 hours, which can mainly be attributed to commuter parking, accounts for around 23% of the long stay parking on a weekday. 6% of short stay parking is also over 5 hours. This suggests that commuters either have alternative parking, or are using season tickets or other modes to travel to and from the central area.

The City Council does not currently provide for long-term car parking, particularly for those people travelling by train from the various railway stations around the city.

The Council offers pre-paid season tickets, which are available to anyone, allowing unrestricted access to the Long Stay car parks of Belmont Road, Bystock Terrace, Cathedral & Quay, Haven Banks, Howell Road, Parr Street, Triangle, as well as Magdalen Road (Monday to Friday Only) and Richmond Road (8am to 6pm). There are currently 120 active season tickets.

In addition to the season tickets there are 26 active business permits, allowing access to Long Stay Cathedral and Quay, with a further 8 having access to Short Stay Bartholomew Terrace. Adding this to the 135 Resident's Permits that also have unlimited access to a long stay car park implies a potential of 30% long stay parking at Long Stay car parks.

EVENING USE

The majority of City Centre retail, leisure and residential growth is likely to happen in the East and North zones of our parking model, including growth that is anticipated to generate more evening car parking demand. The Exeter Vision Partnership's Draft Strategy for the Central Area (June 2013) aims for a vibrant, welcoming and safe evening and night time economy as part of its overall ambition to improve the wellbeing of Exeter. These documents together with several other similar references in policy and Strategy documents highlight the importance of evening parking as a crucial part of helping improve the evening and night time economy.

The majority of the City Centre parking, both on and off street, is either free after 6pm or has a small tariff: parking after 6pm at Mary-Arches for example. Half of the off-street car parking supply is available till at least 11:30pm, with just over a quarter (10 of the 24 car parks) operating 24/7. In addition, two of the car parks, Bartholomew Terrace and Richmond Road, are set aside for residents' permit only parking after 6pm. This together with the availability of a significant on-street parking resource suggests that there is ample evening parking. The benchmarking exercise shows that Exeter City Council operated car parks stop charging earlier in the evening than other operators within Exeter and other comparable Authorities.

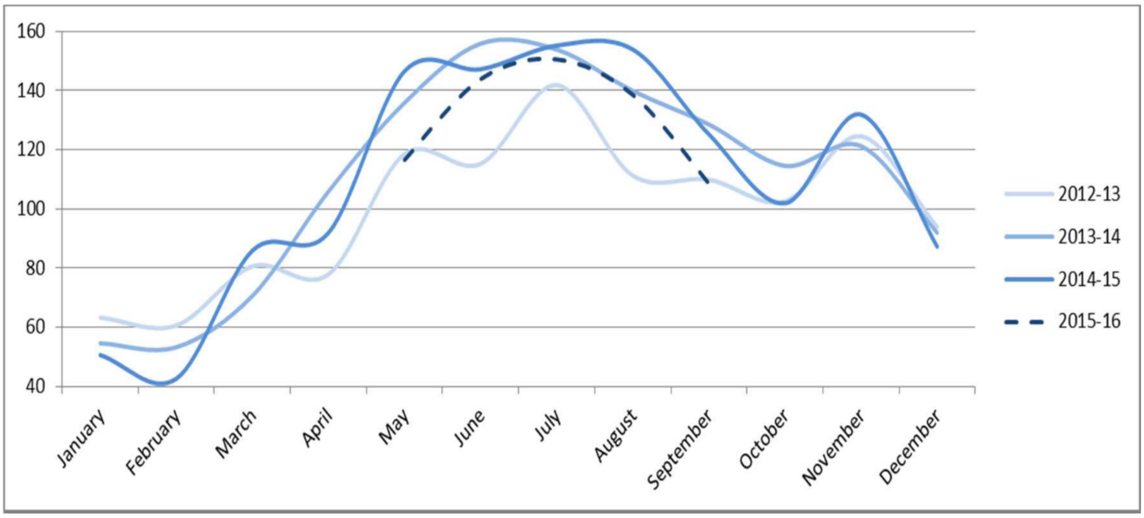
Feedback suggests that there is far greater use of on-street parking in the evening when off-street car parks (particularly multi-storeys and underground facilities) feel less welcoming, especially for women. The lack of time constraint for on-street parking also encourages its use.

COACH PARKING

The numbers of tourist and visitor coaches that use Exeter Bus Station have been monitored in recent years and show an expected trend of more coaches over the summer months as well as November and December for the Christmas markets and shopping. **Figure 10** below shows an indexed yearly profile of use from 2012/13 onwards. The actual numbers are confidential, and by their nature cannot offer complete tourist and visitor coach information for the City, but indicate a small but significant increase in use from 2012/13 to 2013/14, with similar levels in 2014/15 and the partially observed 2015/16.

There are seven regular coach operators that use the Bus and Coach Station, mixed with numerous less frequent operators. The loss of coach parking as part of the re-development of the Bus and Coach Station will be to direct tourist coaches to the one-way South Street for drop off and pick-ups. This will require the removal of on-street parking bays to accommodate drop-off and pick-up areas, and as a one-way street will allow safe use for those accessing and egressing both UK and European coaches as the footways on either side of the road can be used to allow access and egress.

Figure 10: Indexed Coach Parking at Exeter Bus Station



Note: index of 100 has been used to represent average monthly use during 2012/13

It is understood that coaches will be directed from the M5/A38/A30 via Countess Wear and Topsham Road to set down on South Street and then travel down to Exe Bridges and out to the Haven Banks car and coach park at Tan Lane and return. It would also allow the potential for pick up to be made from Haven Road as part of a visit to the City Centre and Quay.

Coach parking counts in the peak use summer months of 2014 suggest that there are occasions when up to 9 coaches can be parked at the bus station but generally there are between two and six coaches during late morning / early afternoon.

No concerns have been raised regarding the coach parking capacity of eight bays at Haven Banks car and coach park following the proposed closure of the bus and coach station, suggesting that the current provision will be adequate for the foreseeable future. As Haven Banks is one of the least used car parks finding additional coach parking space should be possible.

TOPSHAM

Topsham is a local centre to the south east of the City and has a rich history including, in medieval times, operating the second largest trading port in England as well as controlling goods to its neighbouring Exeter. Like many historic coastal towns, its streets are narrow which has led to one-way driving on some streets.

The unclassified road through Topsham connects the A376 Exmouth Road with Countess Weir roundabout and northwards to central Exeter and is a commuter route to Exeter both by car and train. Topsham's railway station is on the Avocet line connecting Exeter with Exmouth and has the only passing point on the single track line.

There are four ECC operated off-street, pay and display surface car parks around Topsham, offering 151 parking spaces all year round and 216 during summer months:

- Tappers Close: 26 spaces next to the Railway Station – local car park with tariff structure geared to longer stays
- Holman Way: 68 spaces half way between the Railway Station and the Quay – local car park with tariff structure geared to longer stays
- Topsham Quay: 26 + 65 spaces at the Quay – tariff structure geared towards shorter stays
- Matthews Hall: 31 spaces in the town centre – tariff structure geared towards shorter stays

Topsham quay capacity varies seasonally with 26 bays all year and up to an additional 65 bays during summer months (May- Oct) when the boatyard is open. All the car parks are well used at weekdays and weekends.

Two of the four car parks (Matthew Halls and Holman Way) are at capacity for both weekday and Saturday. The other two car parks at Topsham Quay and Tappers Close have significant spare capacity (maximum of 40% use) during the week, but are around two-thirds full on Saturdays. The analysis suggests that there is some capacity to cater for future growth within the off-street car parks though perceptually on-street car parking seems close to capacity at times in the day. The short stay car parks are mainly used for up to two hours stay (85%), and the local parking has a more varied use with, in broad terms, a third of users staying up to two hours, a third up to three hours, and a third four hours or more. From reviewing the parking sales by duration of stay, the desire for longer duration parking is not demonstrated at Topsham Quay as the majority of tickets are either up to one hour or two hours with a duration of stay profile that is near identical to Matthew's Hall short stay car park. This is contrary to the perception of Topsham stakeholders reported earlier.

Key Parking Supply and Demand issues

- Saturday City Centre car parking will run out of capacity in 2018
- Weekday capacity is around 60%
- Most city centre parking is short stay use
- Only 23% of weekday parking is commuter parking
- Demand for evening parking is predicted to increase

Parking Operations, Tariffs and Revenue

Location, cost and payment type are the key elements drivers take into account when parking.

CAR PARK OPERATION

Exeter's parking provision has been designated into four different categories: *long stay*, *short stay*, *Premium* and *Local.* The tariff structure is the determining factor for *long stay* or *short stay* parking, which are pay and display. *Premium* car parks are all pay on foot with barrier entry and exit and generally of a higher standard. *Local* car parks are also pay and display and help to serve the needs of a local centre and are tariffed accordingly.

PARKING TARIFFS

The parking tariffs are set by type of car park, with the *Long Stay* tariff geared to encourage long stay parking, *Short Stay* tariff, generally located closer to the centre, geared towards shorter stays and *Premium* parking marginally more expensive than the *Short Stay* tariff. *Local* parking in Topsham, Heavitree and at Okehampton Street has a lower price structure to encourage the use of local centres.

Table 3 shows the parking charges since 2013, which were generally matched in the NCP car parks. There has been no increase in parking tariffs since 2013.

Table 3: 2013 Tariff Structure

	1 HR	2HRS	3HRS	4HRS	5HRS	6+HRS
Premium	£1.80	£2.60	£3.50	£6.50	£8.80	£11.80
Short Stay	£1.20	£2.20	£3.30	£5.70	£7.70	£10.80
Long Stay	£0.80	£1.20	£1.80	£3.20	£5.00	£6.20
Local	£0.60	£0.80	£1.00	£1.20	£1.80	£1.80

It is significant to note that there are no short stay restrictions at long stay car parks or vice versa, though there is a maximum stay of 3 hours at the car park in Heavitree.

On street parking tariffs in the city are £0.70 for half an hour and £1.50 for an hour (Mon to Sat) or £1.00 for an hour and £2.00 for two hours (Sundays and Bank Holidays) On-street parking is restricted to a maximum of 1 hour from Monday to Saturday or 2 hours on Sundays and Bank Holidays. Off-street short stay tariffs are £1.20 for an hour and £2.20 for two hours on all days. Parking is free after 6pm. On-street parking in Topsham is free.

LOCAL COMPETITION

Exeter City Council manages and operates the significant majority of publicly available car parking space in central Exeter with approximately 4,100 spaces in 21 off-street car parks within 1½km of the centre.

There are three privately managed National Car Parks (NCP) car parks in the Central Area with 573 spaces. NCP match ECC's tariff structure for two of their three car parks, with the third (70 spaces) having a different structure with comparatively more expensive shorter stay parking and marginally less expensive long stay parking than ECC's Short Stay tariff. Two of the three NCP Car Parks offer season tickets, which are 15% more expensive than ECC's.

In addition, Total Car Parks Ltd have 275 spaces to the north of the centre. They are marginally undercutting the Long Stay tariff for longer stay users, and for shorter stay users are charging tariffs that sit between the Long and Short Stay tariff structure. APCOA manages car parks at Exeter St David's and Exeter Central train stations and have a long stay tariff geared towards rail users as well as a 3hr stay at Exeter St Davids, presumably to attract local use for any unused bays. Premier Car Parks manages two car parks totalling 90 spaces at Exeter Cathedral, where charges are close to the Premium parking tariff and manage Flower Pot Lane car park which is close to and only marginally more expensive than Okehampton Street Car Park.

Devon County Council operates on-street pay and display parking, which is time-restricted to a maximum stay of one hour in the central zones and is estimated to offer around 500 spaces in the central area. On-street parking tariffs are marginally higher than the hourly cost of ECC's Short Stay parking.

Park and Ride services provided in three sites operated by both Exeter City and Devon County Councils provide an additional 1,700 spaces on the outskirts of the city. ECC manages the Matford Park and Ride (although this will be taken over by Stagecoach as part of the relocation of their bus depot), while Devon County Council manages the Sowton and Honiton Road sites. There is no charge for parking at the P&R sites, with revenue solely related to the purchase of the bus ticket of £2.50 for an adult day-return.

All competitors charge for all their operating hours.

Table 4: Comparative Tariffs

Operator & Tariff Band	Tariff (£)					
	1hr	2hrs	3hrs	5hrs	8hrs	All Day
ECC- Premium	1.80	2.60	3.50	8.80	11.80	11.80
ECC- Short Stay Shoppers	1.20	2.20	3.30	7.70	10.80	10.80
ECC – Long Stay Visitors	0.80	1.20	1.80	5.00	6.20	6.20
ECC – Local	0.60	0.80	1.00	1.20	1.80	1.80
NCP – Princesshay	1.80	2.60	3.50	8.80	11.80	11.80
NCP – Summerland Gate	1.20	2.20	3.30	7.70	10.80	10.80
NCP – Market Street	2.50	4.50	6.00	10.50	10.50	10.50
APCOA – Exeter Central	24 hours £8.10, 10:00-00:00 £4.90					
APCOA – Exeter St David's			3.90			9.90

Premier Park – Flower Pot Lane	1.00	1.00	1.00	1.50	1.50	2.00
Premier Park – Exeter Cathedral	1.50	3.00				
Total Car Parks – Isca Place	1.00	1.80	2.70	4.90	6.00	6.00
DCC – On-Street	Zone A 30min: £0.70, 1hr: £1.50					
	Zone B 30min: £0.70, 1hr: £1.60, 2hr: £2.30					
Matford Park & Ride	Adult Day Return £2.50					
Honiton Park & Ride						

REGIONAL COMPARISONS

The charging structures in other UK by towns and cities of comparable population size and characteristics have been reviewed. These, sorted by population size, are Canterbury, Bath, Worcester, Chelmsford, Cheltenham, Gloucester, Cambridge, York, and Oxford, with Exeter's population being in the mid-range of the above.

The charging hours of Exeter's Long and Short stay car parks (generally between 08:00 and 18:00 hours) is the shortest duration of any town and city compared. The majority charge up to 8pm or 9pm.

In terms of the hourly costs for Long and Short stay car parks, Exeter's *Short Stay* parking charges are in line with the average cost for shorter durations, and comparatively cheaper for those staying for longer durations. Exeter's *Long Stay* parking charges are significantly cheaper for shorter stays as well as cheaper than the average for longer stays. All the comparative towns and cities charge more for short stay parking in long stay car parks than the equivalent time in the short stay car parks to discourage short stay users from using long stay car parks.

Table 5: Benchmarking: Average Tariff Comparison

Operator and Tariff Band	1HR	2HR	3HR	5HR	8HR
	£	£	£	£	£
All Car Parks Short Stay	1.34	2.42	3.49	9.08	13.30
ECC Short Stay	1.20	2.20	3.30	7.70	10.80
All Car Parks Long Stay	1.71	3.11	4.47	8.60	11.71
ECC Long Stay	0.80	1.20	1.80	5.00	6.20

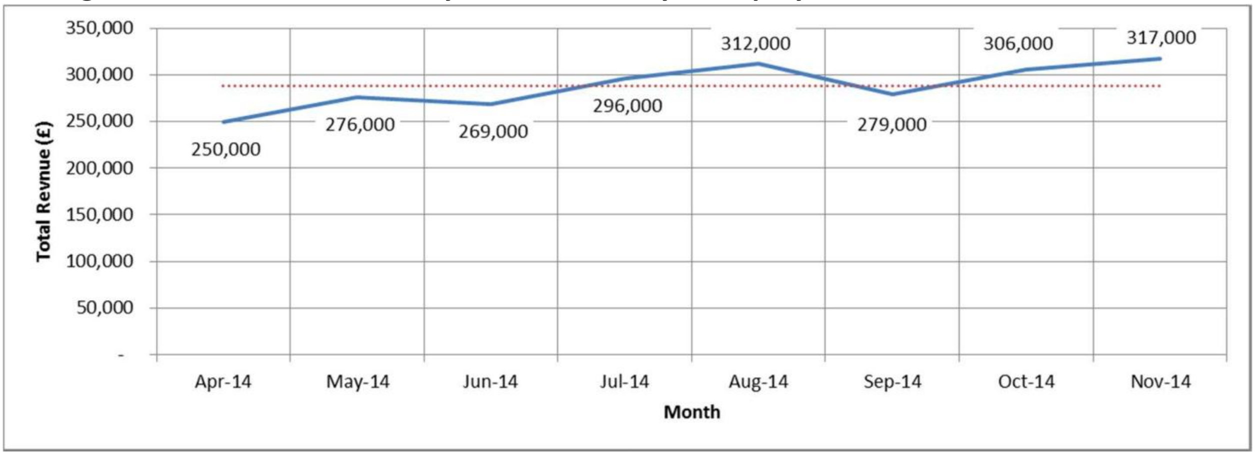
These benchmarking comparison with other similar cities provides re-assurance for considering alterations to the tariff structure, including shorter stay parking in long stay bays, and charges for evening use.

Of the compared towns and cities, Oxford and Cambridge use a separate tariff for Saturdays, and Gloucester uses a separate tariff for Sundays. For example, Oxford's parking tariff which is between 21% and 27% more expensive than on other days.

PARKING REVENUE

Figure 11 below shows how car park income varies throughout the year, with car parking use generally building from April to November with slight troughs in June and September. The months of July and September represent average use across the year. Unsurprisingly, December has the highest monthly income.

Figure 11: Seasonal Variability of the Total Pay & Display Revenue from Car Parks



PROJECTED INCOME

The projected income, assessed on a 2014 Net Present Value (NPV) basis, for car park operations **without interventions** is solely based on population and development growth using the existing tariff structures. This shows a year on year increase of approximately £90K due to population growth until 2018 when capacity is reached on Saturdays and trips and income are thereafter suppressed.

Table 6: Projected Income – Scenario 1 Do Nothing

Tariff Changes apply every day:	Additional First Year Income	Income 2014	Income 2026	Year Capacity Reached on Saturdays
No Tariff increase	£90K (based on population / development growth)	£6.0M	£7.1M	2018

PARKING TARIFF ELASTICITY

Elasticity factors vary with journey purpose, car ownership and public transport provision and use. However, in general demand is relatively in-elastic to price changes. Leisure trips decline more markedly with increases in tariff compared to general purpose trips although the influence of price changes are small for both: a 1% increase in tariff equates to a 0.1% reduction in demand. This means that increasing tariffs will not materially affect demand and will increase income as users that are dissuaded by price will be relatively small in number.

Obviously, the larger the scale of any tariff alteration, the more demand may be affected and the confidence in the modelling declines if tariffs were increased by more than 20%. However, sensitivity tests were carried out on the elasticity model, which as a linear relationship showed only marginal differences even with relatively extreme changes in the relationships between the parameters. For example doubling or halving the elasticity produced only small changes in demand with tariff increases as the relationship is relatively rigid.

TARIFF OPTIONS

Matching the Short Stay tariff for shorter stays up to 4hrs duration in Long Stay designated parking would hardly reduce overall demand and generate an average additional income of upto£430K per annum initially in 2016, increasing gradually through population growth to £500K in 2026.

A linear tariff would be simpler for users to understand and may encourage more use of top-up type payments through mobile phones. Based on current usage patterns the following linear tariffs (Proposal 1 and Proposal 2) would increase annual income by 2.3% and 4.3% respectively.

	Current Tariff	Proposal 1	Proposal 2
Premier			
1 hr	£ 1.80	£ 2.00	£ 1.50
2 hr	£ 2.60	£ 3.00	£ 3.00
3 hr	£ 3.50	£ 4.00	£ 4.50
4 hr	£ 6.50	£ 5.00	£ 6.00
5hr	£ 8.80	£ 6.00	£ 7.50
All day	£ 11.80	£ 12.00	£ 12.00
Short			
1 hr	£ 1.20	£ 1.00	£ 1.20
2 hr	£ 2.20	£ 2.00	£ 2.40
3 hr	£ 3.30	£ 3.00	£ 3.60
4 hr	£ 5.70	£ 4.00	£ 4.80
5hr	£ 7.70	£ 5.00	£ 6.00
All day	£ 10.80	£ 10.00	£ 10.00
Long			
1 hr	£ 0.80	£ 1.00	£ 0.80
2 hr	£ 1.20	£ 2.00	£ 1.60
3 hr	£ 1.80	£ 3.00	£ 2.40
4 hr	£ 3.20	£ 4.00	£ 3.20
5hr	£ 5.00	£ 5.00	£ 4.00
All day	£ 6.20	£ 6.00	£ 6.00

The removal of the hour only tariff, meaning users would have to purchase two hours as a minimum stay, which is the case for several other cities. Based on current usage patterns this would increase annual income by 7%.

SATURDAY PARKING TARIFF SENSITIVITIES

A series of sensitivities on tariff alterations were carried out to assess the impact on parking demand as well as income. The main focus was on Saturdays where demand is currently at practical capacity and predicted to exceed supply by 2018. Increasing tariffs on Saturdays, compared to week day provides a simple economic style partial solution of supply and demand to reduce demand in the centre, with the added benefits of making P&R, bus and train travel more financially attractive as well as more income for the Council. However, modelling suggests that to reduce demand on Saturdays by solely using financial measures would require a severe 25% cumulative year on year tariff increase over the next ten years, equating to tariffs of more than 10x current levels by 2026.

Sensitivity tests have been carried out to understand the effects of more plausible increases in tariff, both to understand the effect on reducing demand, as well as the relative effect on income:

- A stepped blanket increase of 50p every third year from 2016;
- A stepped blanket increase of £1 every third year from 2016; and
- A one off blanket increase of £2 in 2016

The results of the sensitivity tests show that any small increase makes little difference to the capacity issue and each scenario simply delays reaching capacity by a year (2019).

METHODS OF PAYMENT

Most of the public off-street parking supplied by Exeter City Council and National Car Parks is pay and display. Customers can pay by cash with coins and, although change is not given, the machines allow extra time for overpayment so no payment is forfeited. Thirteen of the pay and display car parks accept credit or debit cards for all tariffs and there is no minimum purchase price. Payment by mobile phone is also offered at all of Exeter's pay and display car parks and season tickets and permits are available for individuals, local residents and businesses.

The *Premier* car parks are pay on foot, with machines that accept coins, notes and cards. NCP offers internet based pre-booking for its Market Street car park as well as season tickets for Market Street and Summerland Gate car parks.

PAY BY MOBILE PHONE

Payment by mobile phone allows a much more flexible use of pay and display parking. Exeter City Council uses the PayByPhone® website and mobile phone application which allows your mobile phone to pay and the parking fee is charged to your credit or debit card. In addition to not having to queue at a pay and display machine or find the correct change, you can pay for your parking session using your phone from your car. You can also choose to receive reminder texts (for a charge of 15p) so that you always know when your parking session is about to end and can add more parking time from wherever you are.

This payment option is relatively new and requires setting up a user account on-line prior to use, as well as a service charge of 10p for each time you park. For some customers, the benefit of not needing change together with optional reminders when the car parking is about to expire, allowing remote renewal, outweighs the initial set up inconvenience and service charge. Only 5.7% of possible parking payment transactions were made via Pay by Phone during October 2015.

SEASON TICKET AND PERMIT PARKING

Any customer is able to purchase a season ticket for daily use at any of the following car parks at a cost of £260.00 per quarter. There are currently only 120 active season tickets.

- Belmont Road
- Bystock Terrace
- Cathedral & Quay
- Haven Banks
- Howell Road
- Parr Street
- Triangle
- Magdalen Road (Monday to Friday only)
- Richmond Road (8am to 6pm only)

The City Council's permit schemes offers a range of permits for with different eligibility criteria and at different prices. The car parks where permit parking is offered are not necessarily those with spare capacity. No permit schemes operate in Topsham.

The Council offers a city centre residents' parking permit for residents of specific streets to use specific car parks, as below. Residents' permits cost £125 per annum since 2014. Currently 149 permits are active:

Bartholomew Street Car Park (44 active permits): Bartholomew Street East, Bartholomew Street West, Bartholomew Terrace, Carpenter Close, Fore Street, Friernhay Street, King Street, The Mint, New Bridge Street, Rackclose Lane, St Olaves Mews, Stepcote Hill and West Street. This permit is also accepted at Cathedral & Quay Car Park due to the small capacity of Bartholomew Terrace Car Park (46 spaces).

Belmont Road and Parr Street Car Parks (11 active permits) – Belmont Road, Chute Street, Codrington Street, Parr Close, Parr Street and Sidwell Street. Permit accepted at both sites.

Cathedral & Quay Car Park (19 active permits) – Coombe Street, George Street, Guinea Street, John Street, King Street, Little Rack Street, Lower Coombe Street, Market Street, New Bridge Street, Preston Street, The Quay, Rack Street, South Street, St Marys Steps Terrace, Stepcote Hill and West Street.

Gordons Place Car Park (9 active permits) – Fore Street (Heavitree), Regent Square and Sivell Place.

Okehampton Street Car Park (4 active permits) – Okehampton Street.

Richmond Road and Bystock Terrace Car Parks (62 active permits) – Bystock Close, Bystock Terrace, Exe Street, Little Silver, Lower North Street, Napier Terrace, North Street, Northernhay Square, Northernhay Street, Queens Terrace, Richmond Road, Silver Terrace and St Davids Hill. Permit accepted at both sites.

Bartholomew Terrace and Richmond Road have exclusive residential use between 6pm and 8am. With the exception of the Cathedral & Quay Business Permit no parking space is guaranteed to a permit holder.

Business Permits are available for two car parks only. Businesses in certain addresses within particular streets are eligible for a permit but only if a vehicle is required to help operate the business:-

- Bartholomew Terrace car park - £205 per annum. Currently 6 active permits.
- Cathedral & Quay car park - £565 per annum. Currently 19 active permits.

The daily cost of permit parking, based on 365 parking days per year is:-

Type of permit	Cost per day
Season Ticket	£2.85
Residents Permit	£0.34
Bartholomew Terrace Business Permit	£0.56
Cathedral & Quay Business Permit	£1.55

BLUE BADGE HOLDERS

Blue Badge holders are not automatically exempt from charges in off-street car parks as the parking concessions provided under the Blue Badge Scheme only apply to on-street parking. The basis of the blue badge scheme is for the mobility impaired to be able to park closer to their destination to reduce the walking distance from the car, rather than a financial obligation to reduce travel costs. The conditions of use of off-street facilities are therefore entirely down to the individual car park operator to determine if charges are to be applied, but if provided, disabled bays should be located prominently by the walking desire line exit.

A number of Local Authorities charge for blue badge off-street parking (e.g. Bath in B&NES) and some offer reduced tariffs (e.g. Yeovil in Somerset), though many offer free off-street parking. Cornwall currently offers free off-street parking for blue badges but is consulting on charging for their use. Exeter provides unlimited free off-street parking (except in Premier Pay on Foot sites) for valid Blue Badge holders.

PROMOTIONS AND ADVERTISING

Car parks offer a wide range of opportunities for advertising, sponsorship and cross-promotion, using both the physical assets and tickets and the ability to discount prices. Exeter currently offers:-

- Advertising opportunities on the rear of Pay & Display tickets
- Concessionary parking offers (eg Christmas and Independent Traders Day)
- Car cleaning services at Guildhall
- Catering franchise at Matford P&R

There is potential for other services to be provided in car parks: for example, advertising on ticket machines and hoardings; use of car parks for events; appropriate commercial activities such as car wash etc. Advertising on modern lit hoardings that are well maintained can also improve the amenity and perceived security, especially in multi-storey car parks.

Additionally, the City Council's car parks could support the local economy by offering local businesses or other key stakeholders the opportunity to offer their own incentives, such as product discounts or refunds, for parking outside of peak demand periods.

Key Parking Operations issues

- Exeter's long stay parking charges are significantly cheaper than comparable cities for shorter stays
- Exeter's parking charges do not discourage short stay users from using long stay car parks
- There are no short stay restrictions at long stay car parks or vice versa
- Unlike Exeter, most comparable cities charge for evening parking
- Parking demand is only marginally affected even with extreme increases in prices
- There is low demand for season tickets
- The current permit schemes do not maximise capacity in underused car parks

Car Park Condition and Development

The City's car parks have been assessed for ease of use, quality, dynamic capacity and general operation to give an objective comparison of their quality and condition.

John Lewis and Princeshay1 car parks scored *Very High,* with 13 more scoring *High*. These 13 include the remaining NCP car parks at Summerland Street and Market Street. Only five of the car parks scored as *Average,* with the rest *Good.*

Score	Car Park
Very High	John Lewis, Princesshay1
High	Guildhall, Princesshay3, Summerland, Howell Road, Market Street, Princesshay2, Holman Way, Mary Arches Street, Magdalen Road, Cathedral and Quay, Bamfylde Street, Triangle, Smythen Street
Good	Haven Banks, Matford P&R, Magdalen Street, Bystock Terrace, Bartholomew Terrace, Matthews Hall, Tappers Close, Richmond Road, Okehampton Street, Topsham Quay
Average	Belmont Road, Harlequins, Gordon's Place, Parr Street, King William Street

Of note is that the relatively new John Lewis car park scored the highest while the adjacent King William Street scored the lowest. Similarly, the Guildhall scored highly while the adjacent Harlequins scored low. The Council's three *Premium* car parks, John Lewis, Guildhall and Mary Arches Street fall into three different categories of score.

However, this assessment did not take account of qualitative aspects such as appearance, smell and ambience, though these were noted by the survey team. King William Street, Cathedral and Quay, Mary Arches Street and Harlequins were noted to fall short of what would be expected in terms of appearance and ambience. In addition, feedback from a number of stakeholders and car park users was that Cathedral and Quay in particular is under-utilised as a result of a perceived poor sense of security and unattractive environment.

Notably, improvements to Cathedral and Quay Car park could see a further 125 spaces being taken up on Saturday:

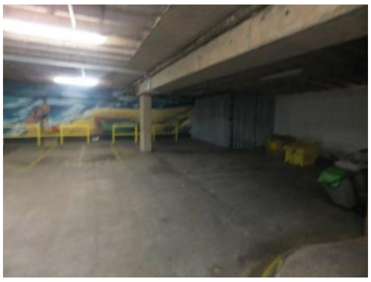
CAR PARK	Rank out of 30	Capacity	Saturday Capacity	Weekday Capacity
Mary Arches Street	10	470	90%	54%
Cathedral and Quay	12*	395	68%	54%
King William Street	30	244	86%	31%
Harlequins	27	91	92%	70%

Operating the car park surfaces, drainage, lighting, signage, painting and lining and equipment including pay and display / pay on foot machines; card readers; barrier systems; ANPR equipment; controlling software and operational links; cash collection; enforcement systems and so on, require significant investment as well as year on year maintenance to provide users with the level of service that they expect. To have a professionally functioning car park operation that can defend the tariff charged, it is essential that appropriate funding is available for on-going maintenance, refurbishment and renewal programmes. This justifies the cost of parking and should also reduce cross-centre travel and related congestion.

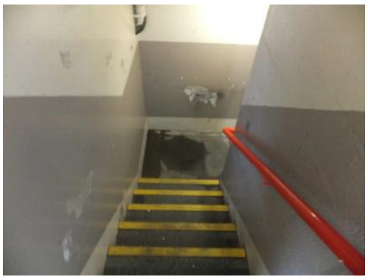
KING WILLIAM STREET CAR PARK

The car park is in a great location for accessing the City and St James' Park Football Stadium. The surface area of the car park is popular, however the underground area is unattractive and used as a last choice for parking within the car park. The outside of the car park section which leads off King William Street is unattractive to potential users and gives a 'run-down' atmosphere (Picture 1). The car park can be accessed from Leighton Terrace and King William Street. These entrances do not interlink efficiently with the one-way system and can been seen as confusing to new users. The signage for the car park along King William Street includes directions to the John Lewis Car Park which may add to King William Street's appearance as a 'second choice' destination. The design of the car park has created many dark 'shady' areas that add to the run down atmosphere (Picture 2). The staircases in the car park project an unattractive and intimating appearance and some car park users choose to walk up the car ramps instead which do not have pedestrian walkways and have poor visibility, making it dangerous for pedestrians (Picture 3).

Picture 1



Picture 2



Picture 3

CATHEDRAL AND QUAY CAR PARK

The car park is in a great location for visiting the Quay and is close to South Street for access to the City Centre. The car park is easily accessible for vehicles travel from the south of Exeter.

However, along the sloped vehicular entrance to the car park there is a help point box. There are no footways to the help point box and therefore it is dangerous to access. The help point box itself gives an old and damaged appearance and provides a negative 'run-down' image of the car park for entering vehicles (Picture 1). Old, unmaintained signage which is stained and consequently illegible adds to the 'run-down' atmosphere. Access between the levels of the car park is intimidating as the lift has graffiti and is dirty (Picture 2). Faded line markings have added to the negative atmosphere by making the car park appear 'dark and dirty'. Collisions can occur as users may be unable to read and follow the line markings (Picture 3).

Users report difficulty finding their way from the car park to the city centre and to the Quay. Improved pedestrian signage in and around the car park would improve this. It is also essential that wheelchair friendly routes from the car park are also clear signed and the city centre maps are legible.

Picture 1

Picture 2

Picture 3

MARY ARCHES STREET CAR PARK

The Mary Arches car park is in the 'Premium' tariff band of Exeter's car parks however it does not match the level of service typical of a premium car park. The car park has many poor aspects which have reflected its weekday use of (54%).

The entrance for the car park can be confusing due to the array of signs that could be better arranged to be more targeted and less distracting. The line markings for the one-way system at some of the ramps between the levels have faded and are in need of maintenance (Picture 1). Refurbishments for staff storage areas are required instead of leaving items in the parking area (Picture 2). The 'run-down' atmosphere of the car park is showcased by graffiti (Picture 3). The lift between the different levels of the car park is not signposted and has a bad odour. The ticket machine shelter has been placed in front of the tariff board and City Centre map making it difficult to read.

Picture 1

Picture 2

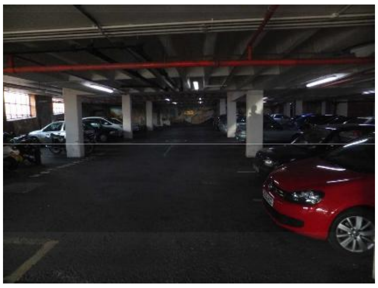
Picture 3

HARLEQUINS CAR PARK

The car park is located in a great location for shopping and other city centre activities.

The car park does not provide a welcoming image to entice visitors to the Harlequins Shopping Centre. The faded line markings at the entrance of the car park have added to the poorly maintained image. The underground area of Harlequins car park is poorly lit and are unattractive to users in the evenings. The help point box gives an old and damaged appearance and provides a negative 'run-down' image of the car park for entering vehicles,

Picture 1



Picture 2

Picture 3

DEVELOPMENT OPPORTUNITIES

Many authorities aim to reduce the stock of long stay car parks / favour short stay car parks to encourage commuters and longer stay journeys to travel on more sustainable modes of transport jointly meeting other objectives such as emissions and air quality. Prioritising short stay car parking encourages shoppers and leisure trips which benefits the local economy whilst not lessening congestion because the arrival and departure profiles are less concentrated. However, given that weekday capacity in Exeter's city centre car parks is significant and only 29% of the carpark users currently stay for more than 5 hours, this is not a priority in terms of strategy or redevelopment.

Many of the council's car parks have significant surface areas in prime sites in the city centre and could be considered for redevelopment. However, this must be balanced against the predictions of full capacity on Saturdays by 2018. Until shoppers and leisure users are shown to be shifting to alternatives to city centre parking on Saturdays, any proposals for redevelopment should consider replacement and even additional parking with decked or underground developments or alternative mitigation measures. The city council should also be mindful of potential loss of income as a result of private or joint venture re-development:

- Magdalen Road car park to the south of the centre offers a natural valley which could accommodate decking level(s) to allow both more parking capacity as well as easier pedestrian routes for less mobile drivers and passengers. However, the size of the car park is relatively small.

- Triangle car park to the south east and close to the proposed re-developed retail and leisure centre at the former bus and coach station offers a prime location for a higher quality multi-storey.

- Howell Road car park to the north of the centre is a large surface car park which has potential for decking over some of its area.

- Magdalen Street car park to the southwest of the centre is a smaller car park but its topography and surrounding buildings suggest a sensitively designed deck may not look out of place.

- At the moment the Revised 2015 SHLAA identifies part of the site at Mary Arches Car Park as being available and suitable for residential development.

Haven Bank car park operates at between 15 and 25% capacity during weekdays and could be considered for a partial re-development for other uses, or for regenerating the area. There are other uses within the car park, including coach parking and boat storage, and there are other issues which may prevent physical redevelopment but nevertheless in is an underused land resource which deserves consideration of alternative or dual use. This will be addressed further in the emerging Masterplan for the Water Lane Regeneration Area.

In addition, there may be potential for residential or commercial development above both the Cathedral and Quay and Leighton Terrace car parks, which may also offer the opportunity to increase the number of spaces.

Key Quality and Development issues

- Not all Premium car parks score highly in terms of quality
- The maximum use of Cathedral and Quay lags behind other car parks, suggesting that it is used as a final choice car park.
- City centre congestion could be ameliorated by investment in King William Street, Cathedral and Quay, Mary Arches Street and Harlequins car parks
- Triangle car park offers a prime location for a high quality multi- storey.

Signs and Influencing Infrastructure

SIGNS

Signage to car parks is part of Devon County Council's Parking Management Strategy. Highway signage requires the agreement and implementation of the local highway authority of Devon County Council, and if necessary, Highways England for the motorway and trunk road network surrounding Exeter (for Park and Ride signs etc.).

Car parking should be strategically sign-posted to:

- reduce traffic from entering the City Centre by encouraging use of the Park and Ride sites
- advise of the availability of City Centre spaces to help inform choice to use Park and Ride
- direct cars to the nearest suitable car park with available space closest to the route they travel in on to reduce cross centre traffic.

A review of traffic signs is required to ensure:

- P&R sites are easy to find
- Drivers are aware of any capacity or congestion issues in the City Centre in time to decide to divert to Park and Ride
- Drivers are aware of the capacity of City Centre car parks as they drive into the City
- Drivers are aware of the pricing differentials to inform their choice of car park
- Drivers are aware of the short and long stay options to inform their choice of car park

Improved signage is needed to help visitors navigate to and around the City Centre car parks. In particular, the current signage and information around Princesshay needs to be reviewed as drivers tend to queue when the car park is full rather than venturing further afield. The current Variable Message System is not trusted by users and needs attention.

In addition to signs, technology can be used to better communicate with users, for example computer and mobile phone applications that give real-time information on parking space availability, Park and Ride bus times, journey times into the city centre and even car park prices. These applications could also allow capture of and response to usage data and other customer feedback. Technology is poised and ready for the collection and analysis of behavioural data at scale and for seeking fresh insights into the complex issues which affect our future and Exeter is poised to do this through Exeter City Futures.

PARK AND RIDE AND RAIL

The Parking Strategy cannot accommodate the predicted demand for parking in central Exeter on Saturdays without a significant modal shift towards P&R as well as rail, bus, cycling and walking. The alternative of supressing demand through fiscal measures would require increasing tariffs beyond a potentially acceptable level of increase and far beyond that of comparable cities and towns.

The three existing Park and Ride (P&R) sites total 1,701 spaces:

- Honiton Road – 660 spaces
- Sowton – 590 spaces
- Matford – 451 spaces (8 disabled)

Two of are operated by Devon County Council with Matford operated by Exeter City Council (but with management to be taken over by Stagecoach as part of the relocation of their bus depot).

The use of Park and Ride grew significantly in its first four years, demonstrated by Devon County Council's study in 2009, with the likelihood of ongoing growth, helping reduce traffic levels in the city centre with associated reduced congestion, and noise and air quality benefits. Is 2009 the latest use figures we have?

Figure 12: Observed Growth in P&R 2004 to 2009 (Source DCC)

In addition four potential new Park and Ride sites have been considered:

- Alphington / Ide to serve the A30 West;
- Cranbrook to serve the A30 East;
- Cowley to serve the A337 and A396 to the North; and
- P&R within the South West Urban Extension

The Alphington / Ide Park and Ride (serving the A377 and A30) is the closest to being progressed and implemented and is at the preferred option stage. This proposal has been around for a number of years and has had setbacks through the planning process.

In addition, Devon County Council is beginning to develop a network of Park and Change sites where motorists park and switch to another mode such as bicycle or conventional bus service.

The background analysis demonstrates sufficient likely demand from commuters and leisure / shopping trips and shows reduced traffic flows and congestion leading the centre should it be progressed. Provision of additional Park and Ride sites will help with the predicted over-capacity issues on Saturdays and will align well with Exeter's Vision and associated policies and strategies.

Rail stations have recently opened at the significant development at Cranbrook to the west of Exeter, as well as at Newcourt. Further new stations are proposed at Marsh Barton, and much more distantly at Edginswell in Torquay. These proposed new stations and associated rail services are welcomed as they encourage the use of non-car travel and accord well with the strategic objectives to reduce congestion and other measures to improve noise and air quality in central Exeter.

Key Signage issues

- Improved signage is needed to help visitors navigate to and around the City Centre car parks
- the current signage and information around Princesshay needs to be reviewed
- real-time information on parking space availability, Park and Ride bus times and journey times into the city centre needs to be improved and developed

Areas for Strategic Intervention

Analysis of the preceding information, data and stakeholder feedback demonstrates that the Council's four strategic objectives – encouraging economic growth, maximising capacity, reducing congestion and maintaining income - can be met with the following interventions:

1. PRICING AND TARIFF STRUCTURE

The issues of over-capacity on Saturdays and under capacity during the remainder of the week can be addressed in part by revising the tariff structure, mindful that demand for car parking is relatively inelastic and will have a limited effect in this respect. However, Exeter City Council manages by far the largest share of public parking provision in central Exeter and therefore can lead and influence parking competitors, especially in terms of tariff. It is likely that alterations to tariffs will generate a ripple effect to other providers to similarly alter their tariffs.

There is a perception that the existing pricing structure discourages dwell time because most users tend to park for up to three hours. A linear tariff would be simpler for users to understand and may encourage more use of top-up type payments through mobile phones. The designation and tariff relating to Long Stay parking should apply to car parks where the majority of users park for longer stays, with a minimum stay tariff of 3 hours. Where there is an abundance of shorter stay parking within a car park then the designation and tariff should be reconsidered.

There is also a perception that prices are generally too expensive, although this is not bourne out by comparison to other similar city offers.

A revised pricing and tariff structure can address the key strategic objective of economic growth by encouraging more shoppers and leisure users into the City, increasing the duration of stay and evening use. It can also address congestion by having pricing differentials between central and more peripheral car parks and by encouraging use of alternatives to city centre parking. However, any revised pricing and tariff structure must have at least a neutral effect on income from car parking. Any additional income gained as a result of changes to demand or tariffs should be reinvested into car park infrastructure or other interventions identified in this strategy.

Recommended actions on pricing and tariffs:

- Introduce a revised pricing and tariff structure that removes the disincentive to park for more than three hours, removes the 1 hour only tariff, increases the duration of stay, reinforces the distinction between Short-Stay and Long-Stay and creates pricing differentials between central and more peripheral car parks;
- Consider increasing the tariff differential between Saturdays and weekdays;
- Remove the financial incentive for short stay users to park in designated Long Stay car parks by matching the tariff to Short Stay for shorter stay users;
- Re-designate Topsham Quay to a medium/long stay car park rather than short stay to serve recreational users
- Consider internet based pre-booking to compete with the existing NCP offer
- Consider a pre-pay card scheme with the potential to be used for parking, public transport and P&R
- Increase the proportion of parking payments made by phone and card
- Work with Devon County Council so that on and off street parking can be managed as one overall supply

2. EVENING OPENING TIMES AND CHARGES

There is a great deal of variation currently in evening opening hours and the inconsistency is confusing. City Centre car parks and the Park & Ride services need to open later especially for seasonal peaks and late night shopping days. Car parks (particularly multi-storeys and underground facilities) feel less welcoming at night, especially for women. Single evening tariffs are most effective for evening/overnight use and should be based on recovering safety improvements and operational costs.

Improving the evening offer in terms of car parking will support the objectives of economic growth and offers the opportunity to increase income for reinvestment into city centre parking services. Where possible, promotions should be designed to encourage users to drive in to the city outside peak times, and/or stay on at the end of the working day, to complement other measures to mitigate peak hour congestion.

Recommended actions on evening opening and charges:

- Specifically promote evening parking at designated car parks;
- Prioritise implementation of measures to improve perceptions of safety and security at designated car parks;
- Consider charging for evening parking acting as a premium product providing safety and security, competing against free alternatives;

- Encourage operators of Exeter's Park & Ride services to open later especially for seasonal peaks and late night shopping days

3. REVIEW SEASON TICKETS AND PERMITS FOR BUSINESSSES AND RESIDENTS

The current portfolio of permits is inconsistent with the objectives of this strategy. Both the prices and the designated parking areas mean that issues of expensive, high demand spaces are potentially filled by cars paying far below the nominal tariff rate for them. In addition, they exacerbate the issue of over-capacity on Saturdays. Moreover, they are not particularly well used and if demand increases they will have an even greater impact. Reviewing the portfolio will address the strategic objectives of capacity, city centre congestion and maintaining income for the council.

Recommended actions on season tickets and permits:

- Review the car parks eligible for season ticket, business permit and residents permit parking to increase Saturday shopping capacity and encourage commuters to take up spare capacity on weekdays;
- Review the number, cost and eligibility of permits to remove the inconsistencies in pricing, reflect demand for city centre spaces and attract more long-stay parking to car-parks with low weekday use
- Review Blue Badge parking areas and payment
- Introduce residents' parking permits for Topsham car parks, prioritising those without house frontage;
- Consider allowing long stay durations of several days at Tappers Close for those travelling away to compliment the adjacent railway station

4. CAR PARK CONDITION AND DEVELOPMENT

There is evidence that the quality of some car parks is deterring use and that has implications for all four strategic objectives: economic growth, capacity, income and congestion. Exeter's car parks (particularly multi-storeys and underground facilities) feel unwelcoming, especially for women and in the evenings. Those more centrally located car parks that do not attract the same level of custom are generally in poorer condition and in need of a facelift and not all Premium car parks score highly in terms of quality. The maximum use of Cathedral and Quay lags behind other car parks, suggesting that it is used as a final choice car park. Providing car parks of comparable quality around the city makes drivers more likely to park in the nearest, most convenient car park to them. Specifically city centre congestion could be ameliorated by investment in King William Street, Cathedral and Quay, Mary Arches Street and Harlequins car parks. Some car parks with significant surface areas could be considered for redevelopment.

The car park portfolio derives around £6m in income for the Council. Of this, £3.8M is earned from the multi-storey car parks of John Lewis, King William Street, Leighton

Terrace, Mary Arches Street, Guildhall, Harlequins, Princesshay 2, Princesshay 3 and Cathedral and Quay. Largely of concrete construction, with maximum spans and minimum supports, and subject to constant changes in load cycles as well as cycles of wetting and drying and differential temperatures, multi-storey car parks have a far greater risk of cracking and long-term deflections than other building structures. The City's oldest multi-storey car parks are almost 50 years old and a structural survey, with an associated investment programme, is recommended to ensure this critical income stream is maintained.

Recommended actions on car park condition and development

- Undertake a structural and condition survey of all multi-storey car parks in the city
- Develop a Car Park Investment Strategy, prioritising improvements to Mary Arches Street, Cathedral and Quay and King William Street
- Commission a feasibility study and business case for the development of a multi-story car park on the existing Triangle car park
- Consider Haven Banks car parks redevelopment possibilities in the context of the development of a Masterplan for the Water Lane Regeneration Area.
- Consider changing the access of Princesshay2 to Paris Street to reduce queueing on Paris Street
- Review demand for electric vehicle charging points
- Improve cleaning standards
- Consider the business case for attended car parks
- Consider offering a choice of wider spaces in some car parks

5. SIGNAGE

Signage helps visitors navigate to and around the City Centre car parks and real-time information on parking space availability, Park and Ride bus times, journey times into the city centre helps both residents and visitors alike determine the most suitable car park for their needs. Well placed, effective signage and live information can influence decisions and by doing so can address two of the strategic objectives, namely capacity and congestion.

Modern technology and data analytics can dramatically improve the efficiency of the way people and vehicles move around a city. An innovative approach to transportation will reduce congestion, shorten journey times, improve air quality, make people healthier and lower environmental impact.

Recommended actions on signage

- Review the directional signage into and around the City Centre to encourage drivers to find the nearest suitable car park with available space closest to the route they travel in on and reduce cross centre traffic.

- Prioritise the review of signage and information around Princesshay and Topsham
- Improve pedestrian signage in and around Cathedral and Quay car park
- Ensure that city centre pricing differentials are clear on directional signage
- Improve the current Variable Message System or consider a better alternative
- Improve real-time information on parking space availability, Park and Ride information and journey times into the city centre
- Consider commissioning the development of a Smartphone app. for real time parking and traffic information in the City Centre

6. INCREASE THE NUMBER OF OFF STREET PARKING SPACES IN THE CITY CENTRE AND TOPSHAM

With the City Centre at capacity on Saturdays from 2018 and increasing pressure on spaces in Topsham opportunities to increase the number of parking spaces should be taken wherever possible. This will address the strategic objectives of economic growth, capacity and income. The impact on congestion will need to be carefully considered and location will be a key element for consideration.

Recommended actions on increasing spaces

- Consider options for increasing city centre off-street parking, particularly in North and West Zones, including the potential for a multi-storey car park on the existing Triangle surface car park
- Consider feasibility and business case for extra off-street parking in Topsham

7. OFFER PARKING PROMOTIONS WITH RESTAURANTS AND RETAILERS

At present, the only promotions City Council are Christmas discount promotions designed to encourage shoppers to the city and to encourage longer stays once parked. This addresses the strategic objectives of economic growth and capacity, where intelligently applied. Clearly discount promotions may negatively affect income so any offers must also be assessed against this objective.

Recommended actions on promotions

- Consider the feasibility and business case for specific off-peak parking promotions by the City Council, particularly where these might serve to address capacity issues on Saturdays and / or assist with further establishing the ’18 hour economy’
- Consider how businesses could offer their own promotions to encourage off peak and evening parking
- Consider introducing a loyalty card scheme for parking
- Consider advertising on ticket machines, hoardings and back of tickets; use of car parks for events; appropriate commercial activities such as car wash etc.

8. SUPPORT THE LOCAL TRANSPORT AUTHORITY TO ENCOURAGE THE USE OF ALTERNATIVE FORMS OF TRAVEL INTO THE CITY CENTRE

Policy interventions outside of parking provision are needed to encourage leisure and shopping trips to use other modes of travel on Saturdays including P&R, rail, buses, cycling and walking. While it is recognised that these are largely outside the scope of this strategy, Saturday capacity issues may dissuade people from choosing Exeter as a retail and leisure destination. These actions will address the strategic objectives of congestion and allow for economic growth of the city centre if Saturday parking capacity is not sufficiently addressed.

Recommended actions on alternative to city centre parking

- Market existing P&R sites to increase the share of commuter and leisure trips
- Support the provision of additional P&R sites
- Encourage people making leisure and shopping trips to use other modes of travel particularly on Saturdays including P&R, rail, buses, cycling and walking.
- Explore the ability of CIL to fund actions that mitigate city centre traffic growth and/or loss of parking and by encouraging use of alternatives to city centre parking

Action Plan

1. REGULATORY

PARKING STRATEGY ACTION	LEAD	DATE
Introduce a revised pricing and tariff structure	Public Realm	September 2016
Re-designate Topsham Quay to a medium/long stay car park rather than short stay to serve recreational users	Public Realm	September 2016
Consider charging for evening parking	Public Realm	September 2016
Review the car parks eligible for season ticket, business permit and residents permit parking	Public Realm	September 2016
Review the cost and eligibility of parking permits	Public Realm	September 2016
Review Blue Badge parking areas and payment	Public Realm	September 2016
Introduce residents' parking permits for Topsham car parks	Public Realm	September 2016
Consider allowing long stay durations of several days at Tappers Close	Public Realm	September 2016

2. PHYSICAL IMPROVEMENTS

PARKING STRATEGY ACTION	LEAD	DATE
Improve cleaning standards	Public Realm	June 16
Review demand for electric vehicle charging points	Public Realm	September 16
Improve pedestrian signage in and around Cathedral and Quay car park	Public Realm	September 17
Undertake a structural and condition survey of all multi-storey car parks in the city, together with an assessment of their development capacity	Corporate Property	March 17
Develop a Car Park Investment Strategy, prioritising aesthetic improvements to Mary Arches Street, Cathedral and Quay and King William Street	Corporate Property	November 17

3. SERVICE IMPROVEMENTS

PARKING STRATEGY ACTION	LEAD	DATE
Specifically promote evening parking at designated car parks	Public Realm	April 16
Consider introducing a loyalty card scheme for parking	Public Realm	April 16
Consider the feasibility and business case for specific off-peak parking promotions by the City Council	Public Realm	January 2017
Consider the business case for attended car parks	Public Realm	April 17
Consider internet based pre-booking to compete with the existing NCP offer	Public Realm	April 17
Consider introducing a pre-pay card scheme for parking	Public Realm	April 17
Improve real-time information on parking space availability, Park and Ride information and journey times into the city centre	Public Realm	2018
Increase the proportion of parking payments made by phone and card	Public Realm	Ongoing
Consider how businesses could offer their own promotions to encourage off peak and evening parking	Public Realm	Ongoing
Consider advertising on ticket machines, hoardings and back of tickets; use of car parks for events; appropriate commercial activities such as car wash etc.	Public Realm	Ongoing

4. PARTNERSHIP IMPROVEMENTS

PARKING STRATEGY ACTION	LEAD	DATE
Explore the ability of CIL to fund actions that mitigate city centre traffic growth and/or loss of parking	City Development	June 16
Work with Devon County Council to manage on and off street parking as one overall supply	Public Realm	September 16
Encourage operators of Exeter's Park & Ride services to open later especially for seasonal peaks and late night shopping days	City Development	December 17
Review and implement improvements to the directional signage into and around the City Centre	Public Realm with DCC	September 17
Improve the current Variable Message System or consider a better alternative	Public Realm with DCC	September 17
Market existing P&R sites to increase the share of commuter and leisure trips	Economy and Tourism	Ongoing
Encourage people making leisure and shopping trips to use other modes of travel particularly on Saturdays	Economy and Tourism	Ongoing

Work with Exeter City Futures to design innovative solutions and re-imagine the City for the future	Public Realm	Ongoing

5. LONGER TERM PROJECTS

PARKING STRATEGY ACTION	LEAD	DATE
Consider changing the access of Princesshay2 to Paris Street to reduce queueing on Paris Street	City Development	2019
Consider options for increasing city centre off-street parking, particularly in North and West Zones, including the potential for a multi-storey car park on the existing Triangle surface car park	Corporate Property	2019
Consider offering a choice of wider spaces in some car parks	Public Realm	2019
Consider feasibility and business case for extra off-street parking in Topsham	Corporate Property	2019

Measures

The effectiveness of any strategic approach can only be judged by collecting data on a range of measures. While there is a great deal of operational data available on parking, the following key areas will be collected and reported on for the purposes of this strategy. The measures highlighted in bold are the key strategic performance measures.

ECONOMIC GROWTH

1. **Dwell time: average ticket time purchased**
2. **Sunday parking demand : Sunday footfall as a % of Saturday footfall**
3. Evening parking demand : number of tickets sold after 6pm
4. Weekday parking demand : number of tickets sold Monday – Friday

CAPACITY

5. **Model shift : number of P&R tickets purchased on Saturdays**
6. Peak Saturday capacity : % of bays sold at 1pm
7. Weekday long stay demand : tickets of 7 hours and over sold on weekdays
8. Weekday long stay demand : number of season tickets issued

CONGESTION

9. Traffic volumes and speeds at peak hours (1pm Sat and 8.30am/5.00pm Mon – Fri)

INCOME

10. Overall Parking income
11. Proportion of parking payments made by cash, phone and card

Measures Baseline – January 2016

ECONOMIC GROWTH

1. **Sunday parking demand : Sunday footfall as a % of Saturday footfall was 52% in November 2015**
2. **Dwell time: average ticket time purchased during January 2016:**
    - **Premium: 2 hrs 15 mins**
    - **Short Stay: 3 hrs 56 mins**
    - **Long Stay: 6 hrs 18 mins**
3. Evening parking demand : number of tickets sold after 6pm during January 2016 was 3,634
4. Weekday parking demand : number of tickets sold Monday – Friday during January 2016 was 113,817

CAPACITY

5. **Model shift : number of P&R tickets purchased on Saturdays during January 2016 was Tbc**
6. Peak Saturday capacity : % of bays sold at 1pm during January 2016 was 79%
7. Weekday long stay demand ; tickets of 7 hours and over sold on weekdays during January 2016 was 4,992
8. Weekday long stay demand : number of 'live' season tickets issued as at 31st January 2016 was 304

CONGESTION

9. Traffic volumes and speeds at peak hours (1pm Sat and 8.30am/5.00pm Mon – Fri) Tbc

INCOME

10. Overall Parking income during January 2016 was £514,570
11. Proportion of parking payments made by cash, phone and card during January 2016 was cash 83.9%, card 12.7% and phone 3.4%