



Strategic Review of Council Car Parking

November 2021

Executive Summary

The Strategic Review of Council Car Parking has two primary purposes. The first is to provide an assessment of council owned car parks in the city and create a hierarchy of those car parks to inform and prioritise immediate investment decisions. The second is to identify information gaps in car parking usage that can be improved to guide future evidence based decision making in Local Transport Plan 4 about the city wide role of car parking in our integrated transport system.

The review establishes a hierarchy of council car parks to manage future parking demand, and which council car parks should be prioritised for investment and improvements. The approach identifies that the council's car parks which are outside the inner ring road, have the lowest impact on our residential communities, and have no viable alternative development use are the highest priority for investment. That is because they are the least likely to be closed should there be any future natural or policy driven decline in parking demand. **It is important to note that there is no suggestion at this point in time that any of the car parks are to close.**

It is important to note that the council cannot use its own car parks in isolation to influence car journeys. Should the city seek to take a future approach to reducing car journeys through car parking it needs to be determined through Local Transport Plan 4 and supported by appropriate planning policy. If the council tried to reduce car journeys through the closure of any of its car parks without this policy framework it could result in the private sector capitalising on the demand created by the reduced supply and responding with the building of new car parks.

In addition to establishing the hierarchy, the review includes a series of recommendations to improve the quality of evidence bases relating to council car parks; the customer experience; encouraging the use of the park and ride and electric vehicles; and working with disabled groups to identify two car parks within the hierarchy as priorities for investment in disabled parking bays, facilities and access routes in to the city centre.

Background

Whilst the council's priority is for people to use sustainable modes of transport, car parking also has a role to play in a successful city centre economy, in allowing the city centre to compete with out of town retail that offer free or discounted car parking. As set out in the My City Centre vision, people and footfall are crucial to the ongoing economic and social success of the city centre, and for some cars will remain the preferred mode of transport. It should be noted that a resident travelling to the city centre by car is not necessarily an additional vehicle journey – it may replace a longer car journey that would otherwise have taken place to a supermarket or out of town retail centre.

The council has 19 car parks across the city in addition to on street pay and display, from the park and ride sites that are a key part of our sustainable transport network, to large car parks servicing the city centre, and small local car parks serving secondary centres. Collectively the car parks generate £7m each year, which is an important income stream in funding the wider services provided by the council. Charging for car parking is not just about income generation, it is also an important tool in encouraging the use of public or active transport.

In addition to the council car parks there are many privately owned and operated car parks within and on the periphery of the city centre. Again whilst the council's preference is for people to use alternative modes of transport where people will park, the principle is that the council should be the parking provider of choice, enabling the revenue generated to be retained in the city and to support the provision of council services.

This review was commissioned in November 2020 by the Executive and the scope agreed in April 2021. The primary driver of the review is to improve the evidence bases to guide immediate council investment decisions in relation to its car parks, and on car parking usage to inform strategic transport decisions in the upcoming Local Transport Plan 4.

Review methodology

The main aim of the review of parking is to create a hierarchy of council car parks that can be used in the future to inform a strategy of how future parking demand is managed and which council car parks should be prioritised for investment and improvements.

There are four objectives identified in the review of council car parking:

- a.** Provide an improved evidence base for future decision making
- b.** Identify strategic priority council car parks for investment and retention should parking decline in the future
- c.** Optimise and future proof council car parks
- d.** Respond to disabled access parking requirements



Outcomes

Under each of these objectives are a number of outcomes:

a. Evidence Base

- Collate all the existing available data
- Identify and implement measures to improve future evidence base

b. Priority car park locations

- Provide a matrix for assessment of car parks using available data to produce a hierarchy of council car parks
- Assess car parks against the above matrix to create a hierarchy to target future investment

c. Optimise and future proof council car parks

- Improve customer experience and the quality of council car parks
- Review the pricing and payment options to allow flexibility based on demand and prioritisation
- Optimise capacity within council car parks and the revenue generation
- Target Electric Vehicle (EV) charging
- Maximise the use of the Park and Rides

d. Disabled access and parking

- Implement the Strategic Review of City Centre Access recommendations
- Implement improvements to the Shop-mobility service
- Identify gold standard accessibility car parks with disabled people and advocacy groups

It is important to note that the council cannot influence car journeys through its car parks in isolation. Should the city seek to take a future proactive approach to reducing car journeys through car parking it needs to be determined through Local Transport Plan 4 and supported by planning policies. If the council tried to reduce car journeys through the closure of any of its car parks without this it could result in the private sector capitalising on that demand and building new car parks, and the policy outcomes not necessarily being achieved.

Evidence Base

Outputs

- Collate all available data
- Identify and implement measures to improve future evidence base

The first step in the parking review was to identify and assess the existing evidence relating to the council's car parks, to allow an assessment of the car parks to be undertaken at this stage and identify where there are gaps in data collection and analysis that could be improved to aid future strategic decision making.

Using the data available, a profile of each car park was produced (annex 1) that set out the following:

- a. General information** – The actual number of spaces in each car park fluctuates over time as different uses are flexed in response to demand, such as cycle parking, disabled bays, EV charging. The numbers contained in this review are based on an in person count undertaken in October 2021 and reflect the position at that date.
- b. Parking Data** – to understand how well used the car park is, who it is typically used by, and how much revenue it generates
- c. Transport Information** – to understand the impact the car park location has on the transport network and the impact on the surrounding area and communities, location in relation to destination, and accessibility to and from the car park.
- d. Property Information** – to understand whether there is an alternative development use for the car park and its land value, and also to consider whether consolidating in to a smaller footprint multi-storey car park is possible with the remaining area developed or used for a different purpose.
- e. Electric Vehicle Charging** – based on the council's Electric Vehicle (EV) strategy 2020-2025, this section is to understand the role car parks can play in provide EV charging points in the city centre, particularly in relation to providing an alternative to on street charging for residents who live in terraced streets where installing EV charging is challenging.
- f. External Influences** – This section is to identify any other influences that should be considered that fall outside of the categories above. Although this is not a demand driven assessment, the expected increase in visitor numbers to the city from regeneration and development, such as to the world class public realm in the Castle Gateway Masterplan and York Central, and a significant increase in the number of hotel rooms and car free developments, has been taken in to consideration.

Each car park has a detailed profile in Annex 1, but the key facts are summarised on the following map.

Council car parks servicing the city centre

4. Bootham Row

0.4 acres
58 Standard Spaces
8 Disabled bays
£339k per year
£5.2k per space

5. Union Terrace

2.2 acres
145 Standard Spaces
13 Disabled bays
£484k per year
£4.1k per space

6. Monk Bar

1.5 acres
194 Standard Spaces
8 Disabled bays
£522k per year
£4.4k per space

7. Fossbank MSCP

1.7 acres
316 Standard Spaces
4 Disabled bays
£230k per year
£1.2k per space

Car park profiles:

- Annual revenue generation based on 2019/20
- Revenue per space based on Q2 2020/21

3. Marygate

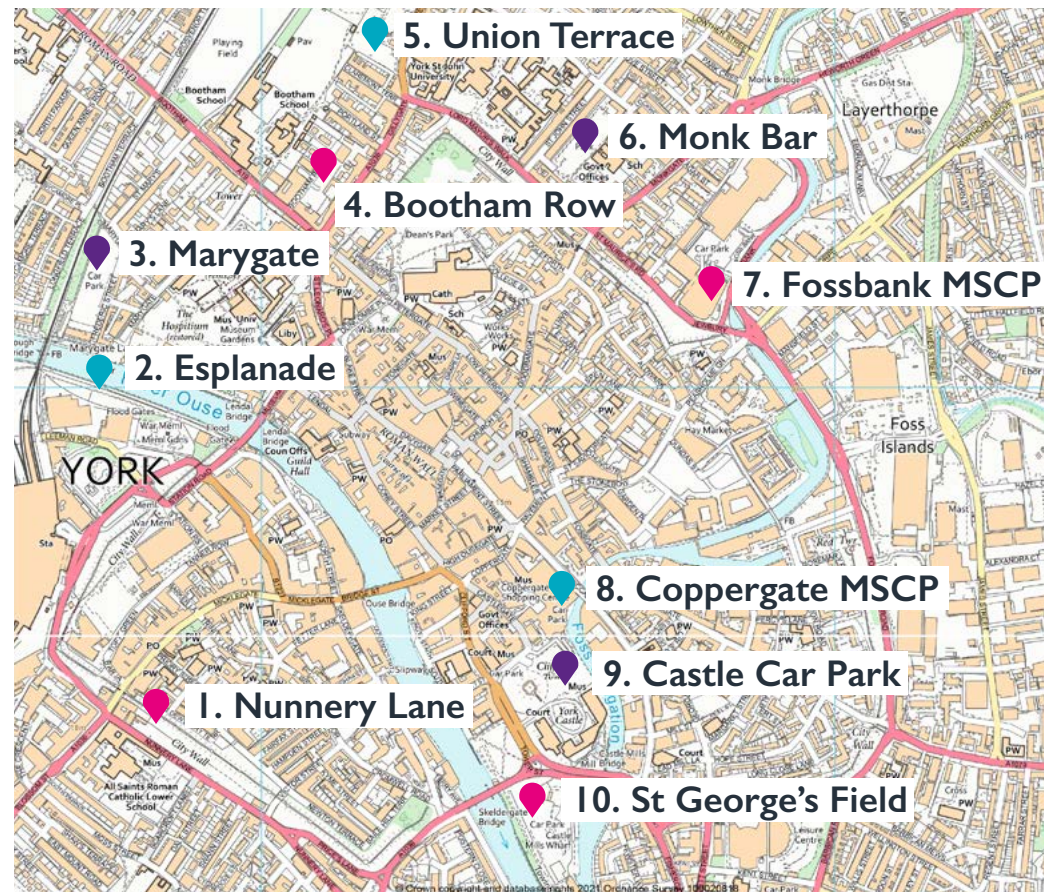
2.3 acres
312 Standard Spaces
11 Disabled bays
£655k per year
£5.5k per space

2. Esplanade

0.7 acres
75 Standard Spaces
5 Disabled bays
£153k per year
£3.7k per space

1. Nunnery Lane

1.2 acres
139 Standard Spaces
12 Disabled bays
£464k per year
£4.5k per space



8. Coppergate MSCP

1.1 acres
248 Standard Spaces
18 Disabled bays
£682k per year
£3.5k per space

9. Castle

1.6 acres
280 Standard Spaces
20 Disabled bays
£1,068k per year
£6.1k per space

10. St George's Field

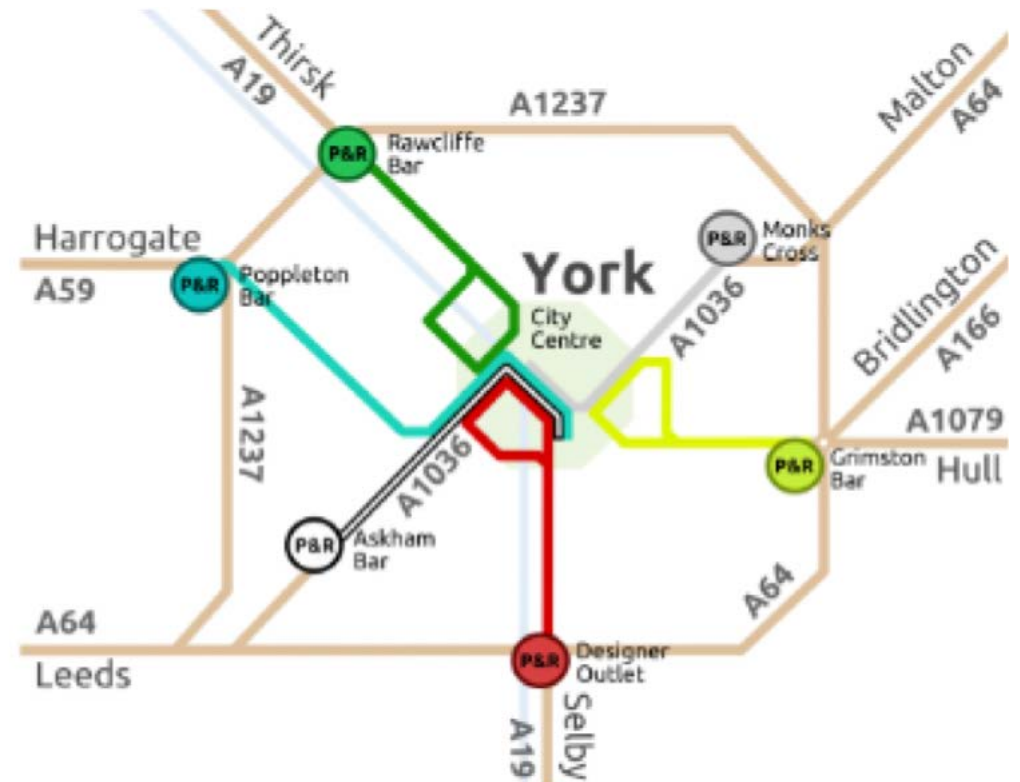
2.2 acres
150 Standard Spaces
7 Disabled bays
£432k per year
£4.5k per space

Park and Ride car parks

Park and Ride Car Parks

The use of Park and Rides and other public transport remains the preferred means of accessing the city centre after walking and cycling.

EV strategy includes significant increase in charging points to be installed in the Park and Ride Sites. There are also ambitions to increase the role the Park and Ride sites in improving the inter-city connectivity by bus.



	Spaces
Askham Bar (P&R)	1100
Grimston Bar P&R)	920
Poppleton Bar (P&R)	600
Rawcliffe Bar (P&R)	1000
Monks Cross (P&R)	800
Designer Outlet (P&R)	600
Total P&R provision	5020

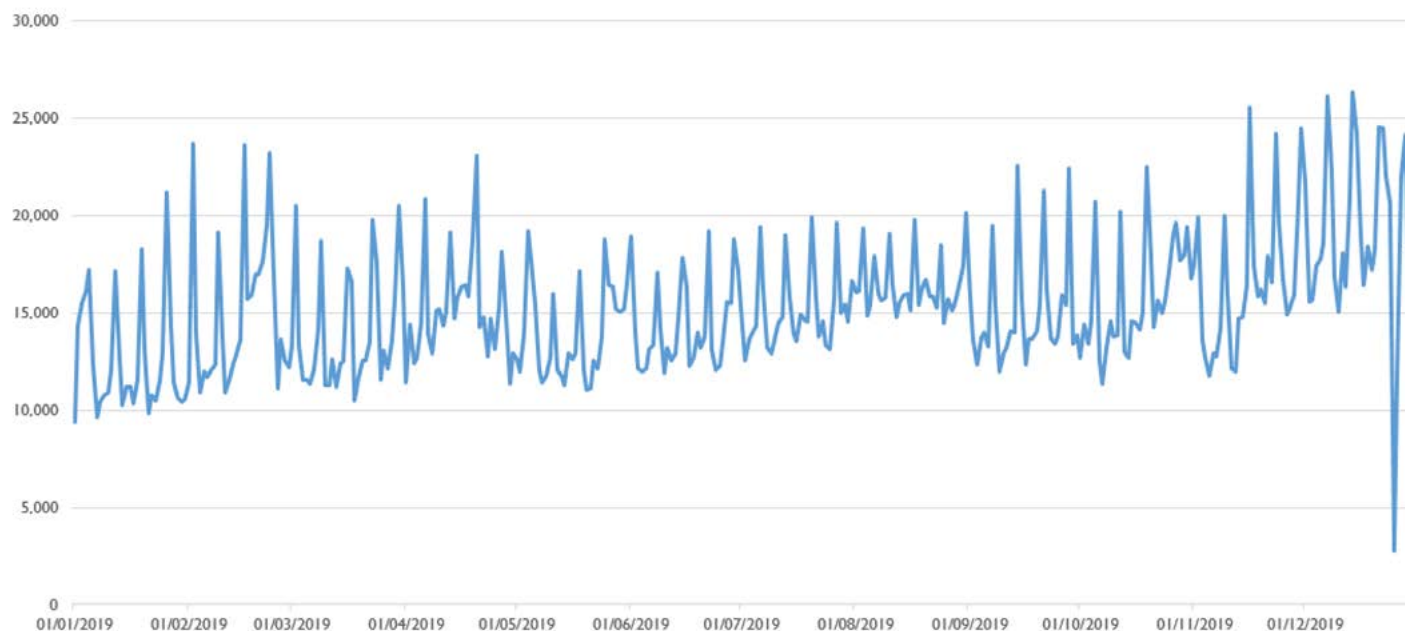
Council car park usage

A variety of mechanisms can be applied to assess usage of council car parks, though it is important to note that this is not currently a core metric analysed in its own right as part of the council's business intelligence or monitoring functions. As a result, data has not been available in a full and consistent manner over a meaningful period of time. There is information held on car park income, and car park usage has been analysed manually through CCTV since May 2020. Additionally, some count data is held in association with the management of live space information on city centre signage, and general city traffic levels are also monitored through automatic count infrastructure.

However, these do not provide a clear and consistent data set, and this could be improved. Automatic Number Plate Recognition infrastructure is planned at some car parks, and pay on exit recently installed at Marygate and Coppergate Centre car parks will assist by improving the availability of accurate information. The strategy sets out recommendations elsewhere to ensure improved information and monitoring of the council's car parking.

The current most accurate measure of car parking usage is the revenue that is generated. Analysis of these figures shows that parking demand fluctuates significantly during the year, with the council's car parks at high capacity at peak times during school holidays and the run up to the festive period, but then much quieter in other parts of the year and midweek. It is important that the capacity exists to meet those peak periods in supporting the city centre economy with sufficient car parking provision.

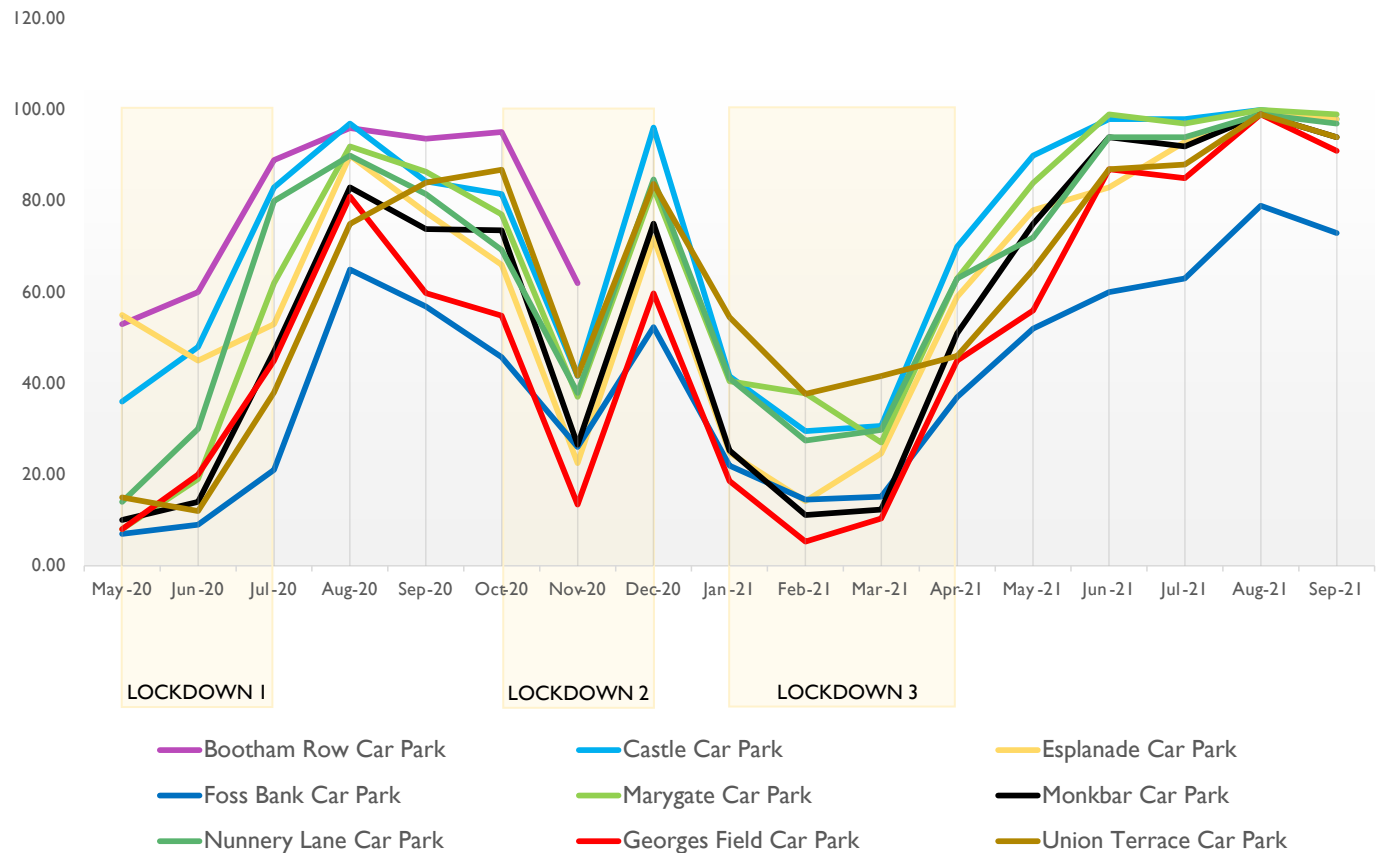
Car parking revenue by month



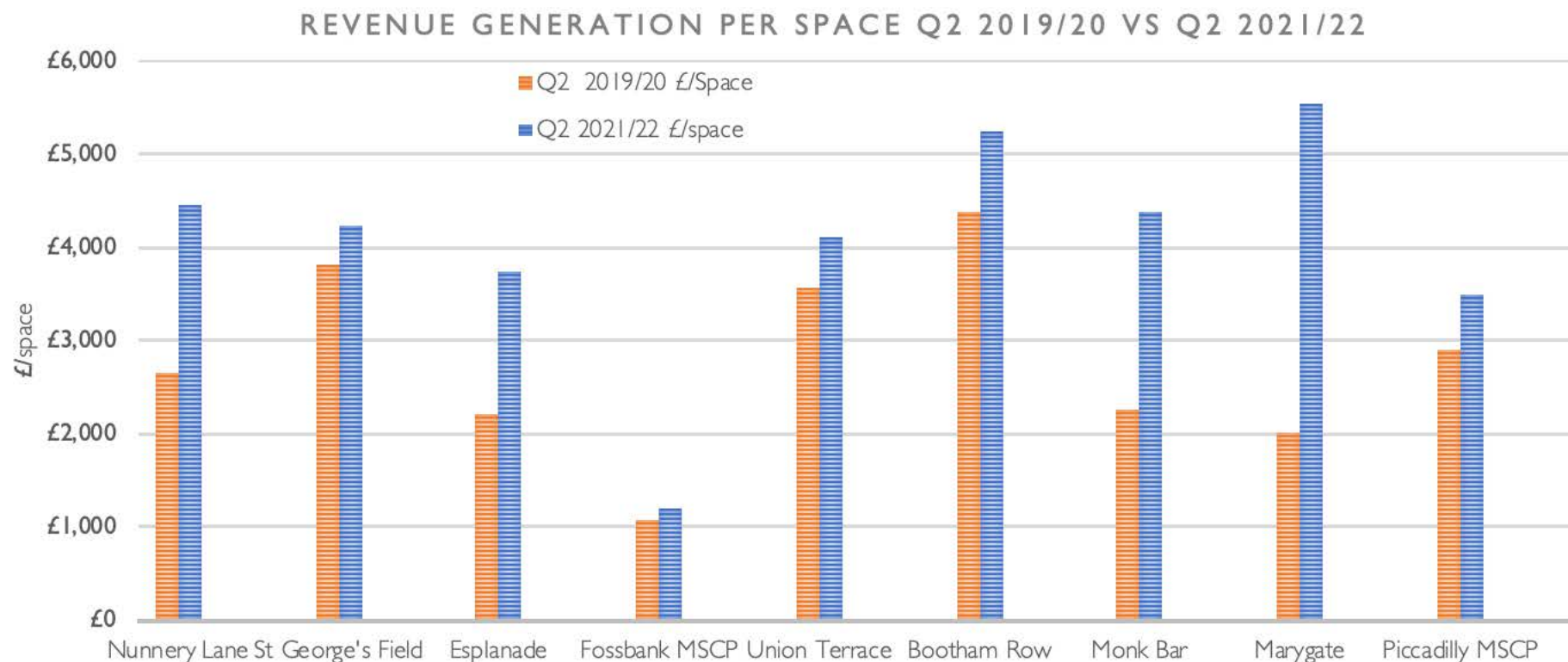
Impact of the pandemic on council car parks

The graph opposite illustrates the usage of a series of 9 council car parks in the city centre, established through the observation of CCTV footage by transport officers. This clearly illustrates both the impacts of the pandemic lockdowns on usage, and the fact that occupancy is now at or above the levels that existed pre-pandemic. Whilst the pandemic is still happening, and current behaviours may continue to fluctuate, the data clearly illustrates that demand for parking has returned, and the majority of the observed car parks are operating very close to capacity at peak times (and before we even enter the typically busiest November to December period).

Observed Average Peak Occupancy by Car Park (%) May 2020-Sept 2021



This view is reiterated in the additional information presented below, which shows revenue income exceeding pre-pandemic levels, with the revenue generated by each space in summer 2019 in orange, being compared with the revenue generated in summer 2021.



It should also be noted that the Rose Theatre was in place during July and August 2019, meaning that Piccadilly and St Georges Field car park incomes were actually higher than typical at that time, meaning the increased revenue in summer 2021 is notably high. The size of the increase at Marygate is however an anomaly as the new pay on exit parking system was experiencing operational issues, leading to revenue losses. It should also be noted that parking charges have increased slightly since 2019, but these would not account for the size of revenue increases, which clearly reflect the current high level of parking demand.

Hierarchy of council car parks

Outputs

- Provide a matrix for assessment of car parks using available data to produce a hierarchy
- Assess car parks to create that hierarchy to target future investment

Methodology

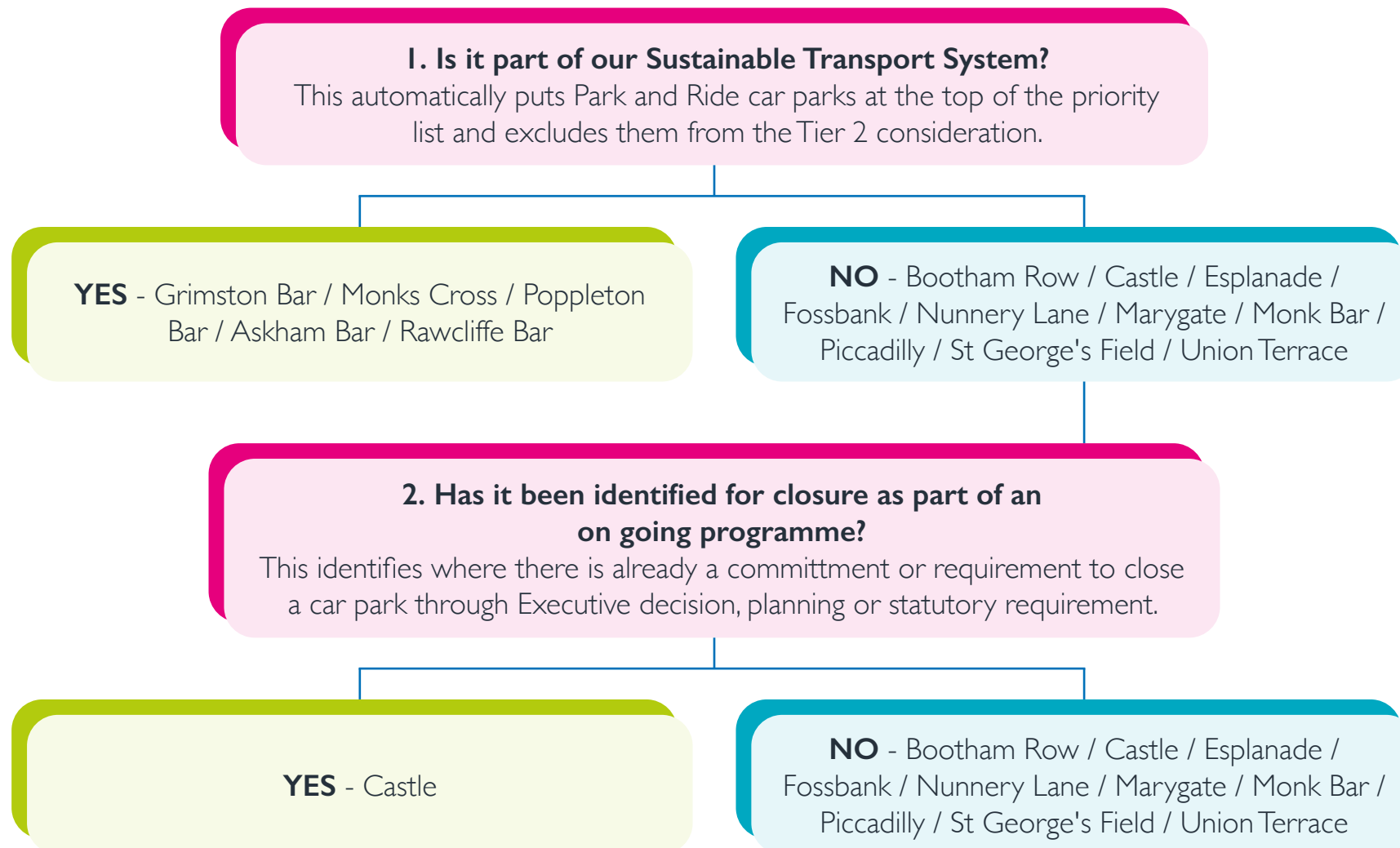
The primary purpose of the review is to use the available information to create a matrix to assess the council's car parks and place them within a hierarchy. This hierarchy will then be used to prioritise investment decisions, and ensure that any spend over and above general improvements and maintenance is focused on council car parks that are likely to remain as car parks should any natural or policy led decline in car parking demand occur.

Based on the information contained within each of the car park profiles, an assessment matrix was established to allow a comparison and ranking of the council's car parks. The assessment process has two stages. The first is to assess the car parks against Tier 1 or Threshold questions. This identifies which car parks should be automatically excluded from the hierarchy as they are already predetermined to remain as car parks (park and ride) or have already been identified for closure (Castle Car Park).

The second stage is to then assess the remaining car parks against Tier 2 or Hierarchy questions, to rank and establish a hierarchy of the councils' car parks to guide future investment decisions. The Tier 2 questions run in order of importance from left to right, to create a sequential ranking system aligned on the council's priorities.

The hierarchy is to be used as a tool to indicate priority car parks for investment and which car parks may be appropriate for alternative uses. This is not a definitive decision making tool. Any future decisions on investment or alternative uses would be subject to individual business cases and Executive decisions.

Tier 1/Threshold stage



Tier 2/Hierarchy stage

The Tier 2/Hierarchy questions are listed in order of importance, with questions to the left of the table having greater influence than those on the right. The questions are split into categories which are set out below:

a. The greatest influence is given to alignment to strategic priorities for the city centre and a sustainability/air quality measure. Questions 3 and 4 identify whether the car parks in the hierarchy align with the car free ambition to reduce the number of journeys in the city centre, the access model for the city centre in the Strategic Review of City Centre Access that determines vehicles should where possible use and park outside the inner-ring road, and indicate what impact the car park has on sustainability and air quality in residential areas:

3. Is it outside or accessed directly from the inner ring road?

4. Is it accessed through a residential area?

b. Questions 5 and 6 in the hierarchy identifies which car parks have an alternative development use and the land value of the car parks as a development asset. Those with an alternative development use that could contribute to the city's housing or employment demand are less likely to be retained as a car parks unless parking could be consolidated in to smaller more efficient footprint multi storeys. Those with no alternative development use of lower land values are more likely to remain as car parks.

5. Does it have an alternative development use?

6. What is its estimated land value? (value per hectare?)

*There are two locations where the council is the leaseholder only of the property, and therefore presents no land value to the council (Fossbank and Coppergate Centre). The land values are indicative only and final values would be subject to full checks of services and legal encumbrances. These would be included in any potential businesses cases informing future decisions.

c. Revenue generation is an important consideration in any future decision making given its role in funding wider council services. Current usage is also an indication of preference, ease of use, and the desirability of a location. (This is one area where data is currently limited and forms a recommendation for improvement). However this is not the highest priority as even if a car park is well used, if it does not meet over city strategic priorities it could still close, as evidenced by the future redevelopment of Castle Car Park in to new public realm.

7. Current usage/current revenue generation based on revenue per space

*Both the pre-Covid and current revenue per space figures have been included – Q2 2019/20 and Q2 2021/22

Only the pre-Covid annual revenue figure has been included due to the unpredictability of the rest of 2021/22

d. Questions 8 and 9 consider the costs of improving each of the car parks, this is assessed through the current surface and parking bay quality and whether the car park has existing toilet facilities. This is a lower priority as all car parks can be improved if they meet the wider strategic aims.

8. Current surface and parking bay quality

9. Does car park currently have toilets?

e. Finally, the hierarchy also considers the role each car park plays in delivering the current EV strategy 2020-2025 and whether there has been recent or planned EV installations.

10. Part of longer term EV strategy

Tier 2 / Hierarchy Questions

4. Is it outside or accessed directly from the inner ring road?	5. Is it accessed through a residential area?	6. Does it have an alternative development use?	7. What is its estimated land value? (value per acre)	8. Current usage/current revenue generation based on revenue per space		9. Current surface and parking bay quality	10. Does car park currently have toilets?	11. Currently identified as part of longer term EV strategy
				Q2 2021/22	Q2 2019/20 2019/20 Income			
Yes	Yes	Yes	less than £1.5m	less than £2,000 / space		High	Yes	Yes
No	No	No	between £1.5m and £2.5m	between £2,000 and £4,000 / space		Medium	No	No
			more than £2.5m/acre	more than £4000 / space		Low		

Council car parking hierarchy

All the council car parks within the scope of the study and not excluded in the first stage have been assessed against the Tier 2 questions to create the hierarchy below. Working from the left each car park is determined under each question to either be a high priority or low priority for investment. By assessing question by question on a priority basis this allows the car parks to be ranked in order.

High priority for parking investment

Low priority for parking investment

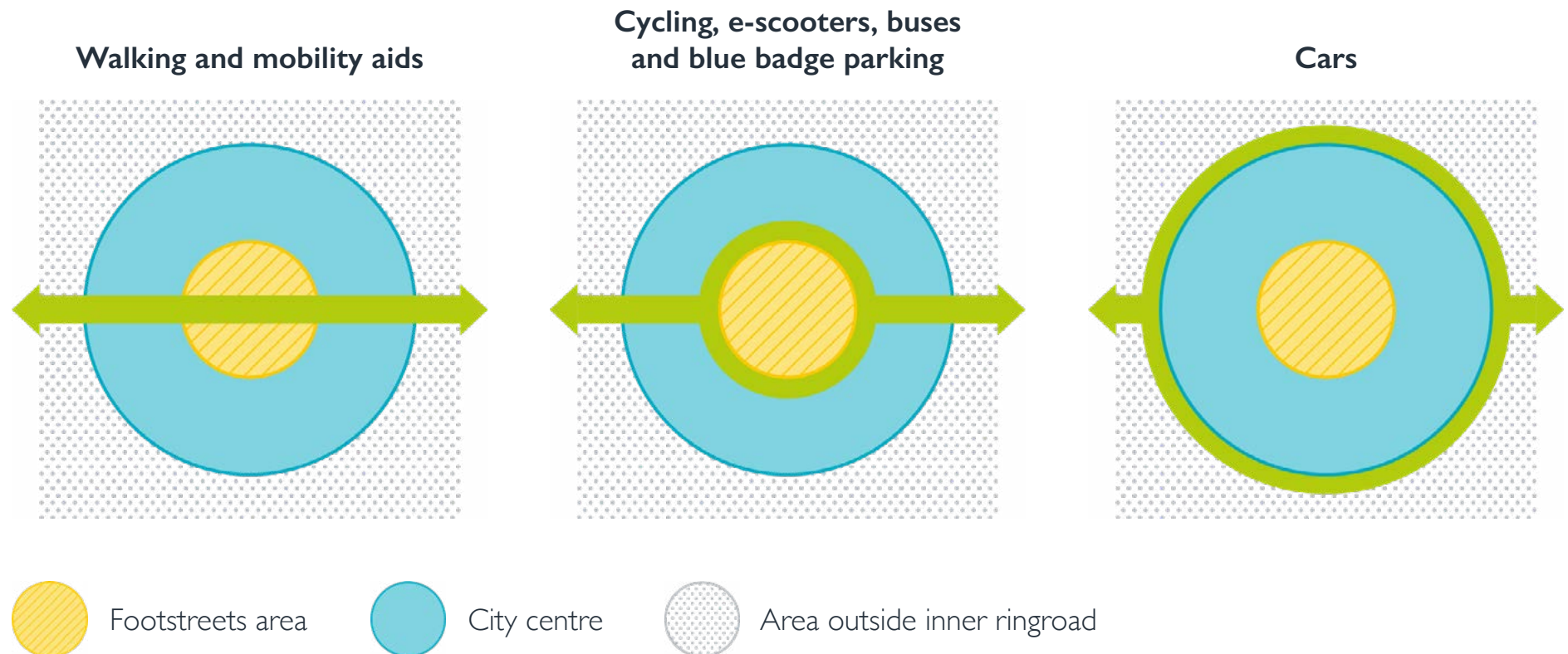
Tier 2 / Hierarchy Questions

High priority for parking investment	4. Is it outside or accessed directly from the inner ring road?	5. Is it accessed through a residential area?	6. Does it have an alternative development use?	7. What is its estimated land value? (value per acre)	8. Current usage/current revenue generation based on revenue per space		9. Current surface and parking bay quality	10. Does car park currently have toilets?	11. Currently identified as part of longer term EV strategy
					Q2 2021/22	Q2 2019/20			
Low priority for parking investment	Yes	Yes	Yes	less than £1.5m	less than £2,000 / space		High	Yes	Yes
	No	No	No	between £1.5m and £2.5m	between £2,000 and £4,000 / space		Medium	No	No
				more than £2.5m/acre	more than £4000 / space		Low		
St George's Field	Yes	No	No	less than £1.5m	£4.2k / space	£3.8k / space	Medium	Yes	Yes
Nunnery Lane	Yes	No	No	less than £1.5m	£4.5k /space	£2.7k / space	Medium	Yes	Yes
Esplanade	Yes	No	No	less than £1.5m	£3.7k / space	£2.2k / space	Medium	No	No
Union Terrace	Yes	No	Yes	more than £2.5m /acre	£4.1k / space	£3.6k / space	Medium	Yes	Yes
Fossbank MSCP	Yes	No	Yes		£1.2k / space	£1.1k / space	Medium	No	No
Bootham Row	Yes	Yes	Yes	between £1.5m and £2m	£5.2k / space	£4.4k / space	Medium	No	Yes
Monk Bar	Yes	Yes	Yes	between £1.5m and £2.5m	£4.4k / space	£2.2k / space	Medium	No	Yes
Marygate	Yes	Yes	Yes	between £1.5m and £2.5m	£5.5k / space	£2k / space	Medium	No	Yes
Coppergate MSCP	No	No	Yes		£3.5k / space	£2.9k / space	Medium	Yes	No

Analysis

This approach identifies that the council's car parks which are outside the inner ring road, have the lowest impact on our communities as they are not accessed through residential streets, have no alternative development use and therefore low land value, should be prioritised for investment. That is because they are the least likely to be closed should parking demand reduce. These car parks are Nunnery Lane, St George's Field and Esplanade.

This consistent with the accompanying Strategic Review of City Centre Access has established a model that is based on three key principles – that the footstreets is an area in which people can walk or use mobility aids; that cyclist, e-scooters, buses and blue badge holders are encouraged to be within the city centre but to pass around or park on the edge of the footstreets; and cars and vehicles are encouraged where possible to use and park outside the inner ring road.



As this is the founding approach on which the strategy is based this has been adopted as the priority principle in assessing council owned car parks. Where possible general parking provision should be located either outside or directly accessed from the inner ring road, to minimise the number of vehicles that access the city centre (although disabled car parking within the inner-ring road remains a key part of the approach). This is also consistent with the park > walk > visit strategy which was promoted in the One Year Transport and Place Strategy in response to Covid, where parking incentives only applied to car parks outside the inner ring road, and any future consideration of a car free city centre that was subject to a council motion in 2020.

It should be noted that within the City Centre Access model blue badge and disabled parking is encouraged within the city centre, and the Strategic Review of City Centre Access sets out measures to continue to increase disabled parking bays across the city centre and on the edge of the pedestrianised footstreets.

The car parks that are identified as lower priority for investment are those that may be considered for alternative uses in the future as they have the potential for alternative development use and a land value that could help offset the loss of parking revenue if they were to close. In some instances these car parks may be able to be developed in part if the demand reduces, whilst still retaining some car parking. It is again important to note that there is no suggestion at this point in time that any of the car parks are to close.

Improving council car parks

Recommendations:

Having assessed the existing evidence bases and car parks it has been identified that the following key improvements would allow an improved evidence base to guide wider strategic decisions in Local Transport Plan 4; improve the customer offer and experience in council car parks; and encourage the take up of ultra-low emission vehicles and use of the park and ride.

- **Undertake a business case to roll out pay on exit in high priority for investment car parks, including a review of detailed data collected and analysis from Marygate and Coppergate pay on exit to date**
- **Bring forward future rolling investment plan to improve high priority investment car parks**
- **Reinstate vehicle counters and variable messaging signs which give real time updates on the number of available spaces to customers**
- **Explore the expansion of the BIDs Moving Insight data through LTP4 to include car parks, which would provide an improved data set including where people have travelled from, their onward route on foot in the city centre, and spend once there**
- **Carry out a feasibility study with First on options for Park & Ride sites to become multi-functional hubs, providing overnight parking for city centre visitors and better inter-city bus links**
- **Continue the roll out of EV charging strategy across the council's car parks**

Disabled car parking

Recommendations:

During the public engagement on city centre access some disabled people identified that proximity to the city's pedestrianised footstreets was less important to them, and they would rather park in car parks with high standard parking bays, better facilities, and high quality access routes in to the city centre. Whilst all car parks will undergo ongoing investment to improve the customer offer it was agreed that identifying two council car parks within the hierarchy for priority investment in improving both the facilities for disabled people and the routes in to the city would help to improve York's access offer. These gold standard disabled access car parks could then be promoted to residents and visitors. It is important to note that this would not preclude those car parks from part closure or redevelopment in the future but the disabled parking would need to be retained.

In discussion with York Disability Rights Forum it was agreed that the disabled priority car parks should be identified in consultation with disabled people once decisions on the future geography of the footstreets have been taken as this may impact on which car park location is most appropriate. Consequently it is recommended that officer's work with disabled people to establish the methodology and define the priority car parks, with a future report to Executive to agree these car parks based on the outcome and consider the investment asks and funding routes available.

- **Work with disabled groups to identify two car parks within the hierarchy for priority investment for improvement of disabled parking facilities and onward access routes in to the city centre**

Action Plan

Recommendations and Requirements to implement	Budget already identified / Budget required	Funding Source	Action Owner	Timescales for delivery	Parking Review Objectives
<p>Undertake a business case for the wider roll out of pay on exit in high priority for investment car parks, including lessons learnt from Marygate and Coppergate.</p> <p>Include in the business case a review of detailed data collected and analysis undertaken from pay on exit to date to strengthen evidence base.</p>	Not required	Existing Parking Budget	Head of Transport	Summer 2022	<p>Improve evidence base</p> <p>Improve customer experience</p>
Bring forward future rolling investment plan to improve high priority investment car parks	Budget required	Business case to consider funding source	Head of Transport	Summer 2022	<p>Improve customer experience</p> <p>Improve car park quality</p>
Reinstate vehicle counters and variable messaging signs which give real time updates on the number of available spaces to customers	Budget required	Business case to consider funding source	Head of Transport	Subject to successful bid	Improve customer experience
Explore improved data sets through LTP4 to provide an improved data set including where people have travelled from, their onward route on foot in the city centre, and spend once there	£30,000	LTP 4 – Subject to business case for data	Head of Transport	March 2023	Improve evidence base

Recommendations and Requirements to implement	Budget already identified / Budget required	Funding Source	Action Owner	Timescales for delivery	Parking Review Objectives
Work with disabled groups to identify from the hierarchy for priority investment, two car parks for improved disabled parking facilities and improved onward access routes in to the city centre	Not required	Not required	Head of Regeneration & Economy/ Head of Transport	Summer 2022	Improve customer experience Improve car park quality Improve disabled access car parks
Implement improvements and promote the identified car parks	Budget required	Report back to Executive for a budget to implement recommendations	Head of Transport	March 2023	Improve customer experience Improve car park quality Improve disabled access car parks
Carry out a feasibility study with First on options for Park & Ride sites to become multi-functional hubs, providing overnight parking for city centre visitors and better inter-city bus links	Subject to funding bid	BSIP funding ask	Head of Transport		Improve customer experience Improve car park quality

Recommendations and Requirements to implement	Budget already identified / Budget required	Funding Source	Action Owner	Timescales for delivery	Parking Review Objectives
Electric Vehicle Charging Points					
<p>Continue the roll out of the Electric Vehicle charging strategy across the council's car parks</p> <ul style="list-style-type: none"> • Union Terrace Hyper Hub (4 rapid and 4 ultra-rapid chargers planned - 2022) • Rawcliffe Bar P&R (50 planned - 2022) • Poppleton Bar P&R (4 rapid and 4 ultra-rapid chargers planned – by end of 2021) • Bishopthorpe Rd (2 rapid planned 2022) 	Already funded	Existing Transport budget	Head of Transport	2021-2023	Improve customer experience