A Parking Strategy for Merthyr Tydfil County Borough Council

A report by Richard Talbot Consultancy Ltd.

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1 Executive Summary

1.1 Background

Merthyr Tydfil is benefiting from a significant regeneration programme, which will progressively create an attractive environment for people to live, work and visit. Parking policy and provision needs to support this process. Additionally, due to a range of factors, parking revenues have declined in recent years. The Council needs to generate future parking revenues that support the operation of its parking operations and the effective management, maintenance and future renewal of its off-street parking estate.

In 2013, Merthyr Tydfil County Borough Council commissioned research to provide a strategic framework within which to develop parking policy. The research generated some useful data, but was not sufficiently comprehensive in coverage to meet the Council’s needs. It also reached conclusions around the provision of free parking that were not financially deliverable.

Richard Talbot Consultancy Ltd. was therefore requested to review and update the existing study and carry out additional research that would enable the Council to deliver sustainable short, medium and longer term actions to optimise the benefits of parking capacity in the town for the benefit of residents, visitors and employees.

This strategy has been developed through:

- Review of previous research conducted on behalf of the Council;
- Consultation with Council and external stakeholders;
- Visual observations and physical surveys;
- Door-to-door surveys of residents;
- Postal surveys of town centre retailers; and
- Analysis of financial data provided by the Council.

This report details the outcome of the research and, following Council approval, a policy document will be produced which the Council can publish on its website detailing the Council’s approach to parking in Merthyr Tydfil.

1.2 Objectives and outcomes for Parking Policy in Merthyr Tydfil

1.2.1 Objectives

This research has resulting in the following proposed high level objectives for a parking strategy for Merthyr Tydfil:

- Ensuring consistency and compliance with national, regional and local policy, whilst recognising local circumstances;
- Keeping highways free-flowing and unobstructed;
• Supporting the Merthyr Tydfil Town Centre Regeneration Programme;
• Supporting the viability of the town centre by maintaining an adequate supply of affordable parking for shoppers and visitors;
• Achieving a revenue contribution which supports the costs of operating, maintaining and renewing the Council’s parking assets;
• Ensuring the needs of mobility impaired residents, visitors and employees are considered;
• Providing appropriately priced long stay parking to support employment in the town; and
• Continuously improve the operation and efficiency of parking according to best practice and emerging trends.

The Council’s parking policy should endeavour achieve these high level objectives, thereby creating a situation where the greatest proportion of parking supply parking is used for its intended purposes. This is not the current situation. At present, there is evidence of large volumes of Welsh Assembly Government and other employees parking in the Merthyr Tydfil Leisure Village and also Merthyr College staff and students parking in local streets. Other town centre employees are also believed to be parking in the Leisure Village or local streets and walking to their place of employment.

Additionally, many town centre visitors use the Tesco car park, contributing to highway congestion and depriving the Council of short stay parking income. Many town centre businesses have difficulties effectively loading and unloading goods, whilst obstructions to the highway or encroachment onto pedestrian footways are frequently caused by inappropriate parking of large and heavy goods vehicles.

1.2.2 Outcomes

For the town of Merthyr Tydfil the local outcomes that the Council seeks to achieve include:

• Sufficient, affordable short stay parking is available to enable town centre visitors to park easily and fulfil their journey purpose;
• Town centre businesses are able to effectively and compliantly load and unload goods;
• The Castle Street car park is perceived as a town centre shopper / visitors car park, as well as for employees;
• Residents throughout the town are able to park within reasonable proximity of their property, subject to the limits of parking capacity;
• Parking capacity at the Merthyr Tydfil Leisure Village is taken up by users and employees of the Village;
• Staff and students of Merthyr College use the River Taff and St Tydfil car parks;
• Employees at the Welsh Assembly Government Building who are unable to park onsite also use the River Taff car park; and
• Revenue from the Council’s off-street car parks and chargeable on-street provision is sufficient to cover operational costs, maintenance liabilities and future renewal responsibilities.

1.2.3 Actions

Achieving the Council’s objectives requires a series of related short, medium and long term actions, suggested as being achievable over a period of between one and two years. The end result will be a balanced parking supply that meets the Council’s objectives, whilst providing town centre users, residents, employees and visitors with value for money parking opportunities.

Short term (3 months)

• Market the new River Taff car park to the Welsh Assembly Government and Merthyr College, with an initially discounted season ticket to encourage early adoption (this product should be available to all, but time limited in availability);
• Commence formal consultation with residents in Ynysfach and Georgetown for the introduction of a Controlled Parking Zone for residents and visitors;
• Introduce lower price short stay tariffs to encourage some users of the Tesco car park to utilise the Council short stay capacity;
• Integrate the Phone and Pay service to the Council’s enforcement system and promote the Phone and Pay system to all town centre users, absorbing the transaction fee;
• Introduce a weekly parking product and promote the availability and price of all season tickets on car park signage, the Council’s website and the Phone and Pay system; and
• Develop a Communications Plan to support the ‘relaunch’ of parking in the town, encompassing traditional and online media.

Medium term (3-6 months)

• Implement a charging and / or control regime at the Merthyr Tydfil Leisure Village to deter the large volumes of daily parking by Welsh Assembly Government employees and other non-users, which might be combined with transfer of the Council parking at MTLV to the Leisure Trust;
• Implement residents parking areas covering streets to the west and north-west of the college, in the Ynysfach and Georgetown areas;
• Reform the current resident permit schemes, moving from the issue of a separate visitor permit (with no VRM attached) to a ‘pay as you go’ system;
• Rationalise on-street parking in the town centre removing ‘goods vehicles loading only’ restrictions which do not meet the needs of retailers, re-designating on-street capacity as 20 minute short stay parking;
• Extend on-street parking outside the Welsh Government Building to at least 4 hours;
• Provide additional / enhanced signage to guide users to appropriate car parks; and
• Consideration – in discussion with key stakeholders including the Welsh Assembly Government and Merthyr College – of undertaking a joint Travel Planning exercise, to gather information around patterns of travel to work and education and provide personalised travel planning information to promote sustainable travel choices.

Longer term (6-24 months)

• Once resident parking restrictions are extended, begin to progressively realign the comparatively over-discounted season ticket products;
• Consider the implementation of time restrictions on HGV loading to reduce town centre congestion;
• Encourage the progressive migration of parking transactions, for daily, season ticket and resident permits from current physical methods of fulfilment to ‘virtual’ fulfilment improving efficiency and user convenience; and
• Develop a business case for the use of technology, such as variable message signing, to improve efficiency of parking operations and utilisation.

1.2.4 Risks and challenges

The delivery of these actions will progressively contribute to the achievement of the objectives described above. However, it is important to recognise that there are potential obstacles and risks that will need consideration, including:

• The likelihood and level of Business Rates and the emerging legal position around enforcement of Council Off Street parking through ANPR may undermine the Business Case to introduce a charging regime at the Merthyr Tydfil Leisure Village, which may mean that transfer of the Council owned parking at the Leisure Village to the Leisure Trust becomes the optimum option;
• Whilst residents support extensions to Controlled Parking Zones in principle, they are reluctant to pay the annual cost to support the provision and operation of these zones;
• The local population is not yet ready for a wholesale migration to parking payment by cashless methods, diluting the potential savings to the Council;
• Whilst most businesses do not require HGV loading, and support the removal of goods loading only restrictions, there is a risk that a small increase in congestion may result where vehicles wishing to load / unload cannot access loading bays;
• If all users currently taking advantage of free parking in the Leisure Village and uncontrolled streets eventually park in Council off-street car parks, there is likely to be insufficient capacity at some times and therefore the Council will need to consider expanding parking supply in the longer term;
• Whilst the tariff changes proposed in this report have a strong rationale, it will take time for Council revenue budgets to recover and ultimately parking income will only be optimised when the control of streets and the Leisure Village has been achieved.
2 Research brief

2.1 Study Remit

A draft parking strategy for the town centre was developed in 2013, in response to:

- The creation of a new multi-storey car park off Castle Street;
- The realignment of the main and overspill college car parks as part of the development of the River Taff Central Link and the redevelopment of Merthyr College; and
- Changes to the road system at the western gateway to the town centre through the development of the River Taff Central Link.

However, the draft strategy did not encompass wider parking issues, such as Merthyr Tydfil Leisure Village and the use of uncontrolled streets for long stay parking. Therefore, further research was required in order to produce a comprehensive strategy. The Council issued, as part of a tender process, a Specification for the study. This envisaged the following actions:

- Liaise with the owners and operators at Merthyr Leisure Village and Merthyr Tydfil CBC to investigate, recommend and agree effective parking solutions that benefit the service users, business operators, town centre users, workers and the general public. This should include investigations into charging and the use of the car park by long term parkers.
- Conduct interviews with residents in the peripheral areas to find effective solutions to resolve conflicts with all day parking by town centre users. This may include residential permit schemes or other parking restrictions.
- Undertake a full zoning analysis of all off street parking, in the town centre with consultation of parking users. This should include a clear pricing structure for each zone and justification.
- Clearly understand the impact of displacement and zoning options on surrounding residential areas. This should be mapped and mitigation methods as mentioned earlier considered and recommendations made.
- Undertake consultation with the Parking, Highways and Regeneration Officers with the Council, Welsh Government Offices at Rhydycar and Town Centre employees to consider their preferences for parking costs and location and how they balance. Recommendations should be made as how this fits with all off street parking sites, zoning and charges.
- Discuss the parking requirements with town centre businesses and what issues affect their ability to operate and develop. Recommendation should be given as to the usage of loading and waiting bays within the town centre boundary.
- Review the current provision of waiting and loading bays across the town centre with the Council’s Traffic Engineer and recommendations on the possible shared usage of these.
• Review the current provision of on street parking for disabled users with the Council’s Traffic Engineer to make clear recommendations that the provisions are managed correctly and that correct advice is available via signage.

• Consider the current locations of double yellow lines and make recommendations as to whether this is suitable to control parking in the area with the Council’s Traffic Engineer and whether more or less additions need to be made for enforcement.

• Liaise with the Council Leader; Director of Customer Services, Head of Economic Development and Principal Engineer to balance the requirements of parking as an income generator against the requirement to ensure that the town centre remains a viable option as a retail and leisure destination.

This study seeks to fulfil these requirements and ultimately provide a strategy that the Council as a whole is able to adopt and utilise to guide its future actions in parking policy, pricing and provision.

2.2 Council Objectives

The Council listed the following objectives in its Specification.

• A review of the draft town centre parking strategy and its recommendations will be required. The proposals put forward to implement free parking for short term town centre users were balanced by cost offsets. These need further consideration and the inclusion of alternative revenue incomes from long stay car park opportunities explored and evaluated.

• To make further recommendations on how to proceed with verbal agreements in place with the Big Heart of Merthyr Tydfil and St Tydfil's plus enter into discussions with Tesco, Beacons Arcade and the Magistrates Court for discussion on financial contributions to implement a free short term parking incentive for introduction in November 2014.

• The provision of a clear mapping exercise identifying which elements of off street parking are to be demarcated as short and long term within the Town Centre area (as referenced in the attached map). Consideration should be given to ensuring the allocation of short term spaces for shoppers to ensure easy access and convenience. The long term allocation should consider comments from workers as to what is acceptable ratio of cost saving versus distance to work. Consideration should also be given as to what the appropriate costs for parking in these dedicated areas should be.

• To consider the current provision of free car parking at Merthyr Leisure Village and to make recommendations that the Council can propose to the owners of the site as to how to effectively manage the site for the benefit of the operators, town centre users, and long stay parking. Recommendations on the allocation of parking and possible tariffs should be included.

• To map the proposed ripple effect of changes to parking provision within the town centre and what residential areas would be affected. Solutions to these issues would need to be provided along with any associated costs, e.g. residential parking schemes etc.
• To review the current on street parking and loading bay allocation across the town centre. Recommendations should be clear on designation, shared usage, timings and allocation. Consideration should also be given to the use of these by blue badge holders and the implications of this.

In discussion with Council officers, it was agreed that the priority are for consideration was the Merthyr Tydfil Leisure Village, therefore research was prioritised accordingly and a separate report produced to advise on the options for implementing restrictions at the Leisure Village. The report has been incorporated into this study.

2.3 Study Methodology

In response to the Council’s Specification, the following phases of research were agreed.

• Review of the previous draft strategy by Miller Research, to identify content that could be incorporated into an updated strategy and the extent to which elements of their research would need to be repeated.
• Consultation with Council Officers and Members. A priority was clearly to establish the perspectives across all Council stakeholders in relation to parking policy.
• Consultation with external stakeholders. A list of key external stakeholders was identified and an undertaking given to engage with these to generate deeper understanding of the issues.
• Further research and consultation, which was agreed following the initial project phases to be directed towards town centre businesses and residents.
• Analysis of data relating to revenue and transactions at the Council’s off-street car parks and recommendations for tariffs.

The information generated from these research phases has been collated into this report. Additional material has been added which outlines the context of parking policy development and also emerging good practice in parking management and development of technology that may be worthy of future consideration.

2.4 Parking policy and practice

2.4.1 National and regional Policy

The policy context within which parking in Merthyr Tydfil needs to be considered includes:

• Planning Policy Wales - Technical Advice Note 18: TRANSPORT
• National Assembly For Wales Inquiry Into Town Centre Regeneration, January 2012
• South East Wales Transport Alliance Regional Transport Plan March 2010
• CSS Wales – Wales Parking Standards 2008 January 2008
• Manual for Streets
• Equality Act 2010
These documents all contain guidance on parking policy and are relevant to a degree in certain Council decision making considerations, for example the levels of car park provision to be permitted in planned developments.

However, most policy advice on parking is necessarily at a high level and merely establishes principles which Local Authorities apply to their own circumstances. For example, in Wales, a key guidance document is Technical Advice Note 18. Some relevant extracts are shown below, which demonstrate that the advice in the document is generic and needs to be applied in the context of the specific conditions in Merthyr Tydfil.

**Technical Advice Note 18**

TAN 18 notes that ‘the full range of issues local strategies could address are:

- maximum parking standards for various uses;
- the need for new parking provision for the public;
- balancing on and off site parking provision and managing the effects of displaced or ‘over-spill’ parking;
- planning obligations relating to parking management and provision;
- local disability and cycle parking standards; and
- parking design/dimensions.

The provision of public car parks can have an important role in supporting the vitality and viability of town centres against damaging competition from out of town sites but planning authorities should be careful to avoid creating incentives for travelling to town centres by car or undermining the viability of public transport.

Parking charges and limits on provision or time have an important role in managing congestion and the impact of traffic on residential amenity. Overall parking provision within towns will affect traffic levels as will the cost of parking.

Charges or time restrictions in town centres should discourage all day parking but encourage short-term parking for visitors such as shoppers, especially those from the rural hinterland. These should be backed up by adequate enforcement measures.

**Conclusion:** within the remit of this research, the Council is not bound by any specific policy guidance but should consider the overall spirit of this guidance to provide a balanced parking strategy.

**2.4.2 Wider academic evidence and good practice**

Historically, the evidence base for parking policy was relatively weak when compared to other public realm activities. However, a series of recent studies have been published which assist in broadening parking knowledge and generating evidence to guide the formulation of parking policy. A few relevant examples are shown below.

A European Union report identified parking policy as playing ‘… a very important role in urban mobility, both in enhancing accessibility and in combating urban congestion. In modern ‘mobility management’ parking is the largest single management tool.’

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1 Parking Policies and the effects on economy and mobility (EU Technical Committee on Transport)
Eventually any parking policy will aim for a change from long stay parking in urban areas to short stay parking in urban areas. This is to facilitate visitors and business trips and to prevent commuters occupying parking places intended for visitors and consumers, especially on street”.

The report sets out a series of 7 stages that parking policy is likely to evolve through.

1. Little or no management of parking, no pressure on capacity
2. Demand exceeds supply in places, on-street regulation begins, supply side responses to growing pressure on the limited capacity
3. Time limits, simple pricing, and municipal efforts to build off-street parking
4. Extended management from commercial cores to surrounding residential areas, using tools such as residential parking zones or permits
5. Increasingly sophisticated pricing differentiation
7. Integrated parking management into a holistic transport demand management strategy.

It is suggested that Merthyr Tydfil is at a fairly advanced stage along this process. The recommendations within this report seek to consolidate stage 4 and 5 measures to ensure that the Council achieves a balanced provision, priced fairly, but operationally sustainable.

**Old and new parking paradigms**

Research in the US\(^2\) suggests that parking policy is moving from an old to a new paradigm, as broadly characterised in the table below.

<table>
<thead>
<tr>
<th>Old Parking Paradigm</th>
<th>New Parking Paradigm</th>
</tr>
</thead>
<tbody>
<tr>
<td>more parking is usually better</td>
<td>strives for optimal parking supply and price</td>
</tr>
<tr>
<td>predict-and-provide</td>
<td>accepts sharing of parking between multiple destinations</td>
</tr>
<tr>
<td>requires plentiful on-site parking with every development</td>
<td>sees opportunities to manage parking demand</td>
</tr>
<tr>
<td>assumes that a ‘parking problem’ means insufficient free parking</td>
<td>sees too much supply to be potentially as harmful as too little</td>
</tr>
<tr>
<td>assumes demand cannot be reduced</td>
<td>Takes a multi-modal approach</td>
</tr>
<tr>
<td></td>
<td>Maximum rather than minimum parking standards in development</td>
</tr>
</tbody>
</table>

Table 1. Old and new parking paradigms

\(^2\) Litman 2006
Again it is suggested that Merthyr Tydfil is at least some way towards the new parking paradigm, which is reflected in the policy documents noted at the start of this section.

A report for the Department for Transport\(^3\) investigated the evidence about the impact of different types of parking measures and policies on road traffic, congestion and transport safety, car ownership, on the level of carbon emissions from transport, on the activity of businesses, and on townscapes. The focus was mainly though not wholly, on urban areas. The report considered the policy context set by DaSTS (the DfT’s Delivering a Sustainable Transport System) which has five goals for our transport system:

- to support national economic competitiveness and growth, by delivering reliable and efficient transport networks;
- to reduce transport’s emissions of carbon dioxide and other greenhouse gases, with the desired outcome of tackling climate change;
- to contribute to better safety, security and health and longer life expectancy by reducing the risk of death, injury or illness arising from transport, and by promoting travel modes that are beneficial to health;
- to promote greater equality of opportunity for all citizens, with the desired outcome of achieving a fairer society; and
- to improve quality of life for transport users and non-transport users, and to promote a healthy natural environment.

Areas of key interest for the DfT included the impacts of parking policy on:

The main area of interest for the DfT is the impact of parking policy upon the following factors:

- Congestion
- Carbon emissions and pollutants
- Sustainable transport
- Business activity and town centre viability
- Urban design, landscape and townscape

It is suggested that these considerations at least partially align with Merthyr Tydfil County Borough Council’s own perspectives.

Key findings from the study are shown below with comments on their relevance to MTCBC:

<table>
<thead>
<tr>
<th>Finding</th>
<th>Relevance to MTCBC</th>
</tr>
</thead>
<tbody>
<tr>
<td>There is a lack of statistics on the availability of Private Non-Residential (PNR) parking</td>
<td>There is an unknown amount of PNR parking in the town which is mainly used by employees, this is worth quantifying</td>
</tr>
<tr>
<td>There is little evidence dealing with links</td>
<td>Since the demise of SEWTA, MTCBC is</td>
</tr>
</tbody>
</table>

\(^3\) Parking Measures and Policies Research Review (TRL 2010)
<table>
<thead>
<tr>
<th>Topic</th>
<th>Conclusion</th>
</tr>
</thead>
<tbody>
<tr>
<td>between parking and congestion, CO2 emissions and sustainable transport</td>
<td>responsible for its own LTP and will need to consider these areas further</td>
</tr>
<tr>
<td>Parking charges often appear to be relatively arbitrary, neither reflecting the cost of provision, nor the ‘market’ price that users are prepared to pay.</td>
<td>The approach to pricing should be market based and take on principles established in commercial parking operations</td>
</tr>
<tr>
<td>Whilst charging for parking is a step-function, with prices increasing incrementally at infrequent intervals, parking demand is a continuous function, therefore there is a lag between the two</td>
<td>MTCBC should consider a more flexible approach to changing parking prices removing prices from fixed signage and displaying these in a more dynamic way</td>
</tr>
<tr>
<td>Research has demonstrated the importance of parking costs to travel choices although the extent of the impact may vary. A combination of parking charges and reducing or restricting parking availability is likely to be most effective in encouraging behavioural change.</td>
<td>Merthyr Tydfil is a town where evidence suggests a high degree of price sensitivity, therefore the impact of price changes is likely to be high. However, due to the topography and limited public transport options from some origins, car dependency may be higher than national averages.</td>
</tr>
<tr>
<td>Information on long-run elasticities is lacking as few time-series analyses have been undertaken.</td>
<td>Since understanding elasticities is necessary to predict the outcome of parking price changes, further research should be undertaken in the future to calculate local values.</td>
</tr>
<tr>
<td>Research suggests that it is not just parking charges that influence shoppers’ behaviour</td>
<td>Since it is well understood that simply providing free parking will not in itself be a reason for people to visit the town, the future development of parking pricing and provision should be integrated into wider promotion of shopping, tourism and culture.</td>
</tr>
<tr>
<td>It is often claimed that parking pricing spoils local economic activity by discouraging customers, but it actually provides both economic benefits and costs. It increases turnover of parking spaces which makes finding a space easier, reduces the number of parking spaces required at a location which can provide financial savings, and can reduce traffic problems such as congestion.</td>
<td>MTCBC should continue to argue logically against the provision of free parking, including on-street where it impacts on residents ability to park near their home, or distorts the market and potentially reduces the ability of short stay visitors to access parking.</td>
</tr>
<tr>
<td>Searching for a parking space in town centres</td>
<td>MTCBC should enhance signage and in the future consider guidance systems</td>
</tr>
</tbody>
</table>
can cause stress when travelling by car such as variable message signing to assist in guiding visitors to the most appropriate parking opportunities.

Table 2. Summary of DfT Parking Research

2.4.3 Elasticity

As is outlined later in this report, parking demand is subject to price elasticity. This issue was not addressed in the Miller Research and therefore an unsustainable proposal was recommended, which included large increases in parking prices for long stay parking, which would have resulted in a loss of parking volumes and exacerbation of current problems of parking in local streets. There follows a short discussion of elasticity which concludes that it is not possible to accurately calibrate this for Merthyr Tydfil but, if data is accurately compiled, a future elasticity analysis may be achievable, which would be useful for the development of future pricing strategies.

Various studies have estimated price elasticities of parking, concluding that elasticities of travel demand vary with circumstances and that most evidence relates to mode choice. For example, a 10% change in car journey time has a bigger impact on the number of trips made and kilometres travelled than a 10% change in car use costs. However, the value of time over money also varies. A US study calculated higher levels of demand elasticity for congestion tolls than parking fees. Imposition of tolls had elasticity of -1.8, whilst introducing new parking fees were estimated at -1.2. These figures demonstrated that the effectiveness of congestion tolls in reducing demand is higher than parking charges.

Overall elasticities also appeared to have the following characteristics:

- Shopping trips are more likely to be suppressed than work trips;
- Absolute price increases are at least equally important than percentage price increases;
- Demand is more sensitive to increased car costs than improvements to public transport;
- Walking distances are important and demand reduces with walking distances in excess of 400 metres;
- However, cross price elasticity (the impact of multiple variables on demand) is not well understood and is also likely to be highly localised.

Research for the British Parking Association this research suggests that parking elasticities for parking charges are likely to be at least -0.2 (2% of parking volume lost for each 10% tariff increase) and may be as high as -1.2 (for every 10% increase in price, 12% of volume may be lost). The research looks at a range of previous studies and concludes:

“Significant variation has been found in the price elasticities quoted; this is consistent with the findings of previous reviews. The mix of free and priced parking will confuse the

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4 [http://www.britishparking.co.uk/write/Documents/Library/Reports%20and%20research/parkingreport.pdf](http://www.britishparking.co.uk/write/Documents/Library/Reports%20and%20research/parkingreport.pdf)
results and other factors that influence car-use e.g. walking distances, public transport provision, parking charge levels, real incomes etc. will all have an effect”.

For Merthyr Tydfil we need also to consider the additional non-pricing (or exogenous) factors, including the disruption to parking supply, road disruption, relocation of council staff and change in the retail offer, which have been highlighted as factors in the change in parking revenues.

**Conclusion:** Caution should be exercised before tariffs in Merthyr Tydfil are increased and this should be done incrementally and in response to market based evidence. In the revenue modelling section of this report, a high level of elasticity at -0.81 has been estimated, so for each percentage increase in price close to an equivalent percentage of parking volume has been lost. In order to develop greater accuracy around this figure it for Merthyr Tydfil it is recommended that further study is carried out over the coming years. The exogenous factors mentioned need to be taken into account when calculating future revenue budgets.
3 Review of previous research

3.1 Parking Strategy by Miller Research

Miller Research was contracted in June 2013 to undertake a strategic review of parking in Merthyr Tydfil and recommend changes to parking operations, to support the regeneration of the town. At this time, a new 250 space Multi-Storey car park at Castle Street was completed. Areas of the study focus included:

- Parking supply;
- Operations and revenue;
- Balancing the Council’s respective priorities, working within local and national policy whilst delivering Council budgets.

The report included three main phases:

- Appraisal of the policy context within which parking operates;
- Qualitative Research including stakeholder interviews;
- Quantitative research including data collection and surveying of town centre users and employers / employees; and
- Analysis and reporting.

A wide range of stakeholders was included in the consultation. Interviews were undertaken with key employers and town centre users. Existing data sets provided by the Council were reviewed, within the context of existing and future redevelopment and regeneration. A survey of employers / employees was carried out with 79% employees. The sample size was 193. 252 town centre users were also interviewed, focused on the St Tydfil area, predominantly shoppers. It is acknowledged that the construction of the Castle Street MSCP impacted on the outputs of the survey work. There is a discussion in the report around the statistical robustness of the sample size, which is reported to be accurate within 6.15%. The description of the sampling technique and its robustness may not have sufficiently segmented the town centre visitors, particularly by access mode. 16,000 people per week do not access by car.

Policy Context

The study discusses the policy context, including:

- Planning Policy Wales - Technical Advice Note 18
- National Assembly For Wales Inquiry Into Town Centre Regeneration, January 2012 (interestingly, the researchers quote Sustrans, who are opposed to reducing parking charges to support town centre viability at the expense of sustainable transport modes).
- South East Wales Transport Alliance Regional Transport Plan March 2010: acknowledges that ‘.. parking provision is often a very localised issue ..’ but ‘…supports a consistent approach to car parking standards across the region’
• CSS Wales – Wales Parking Standards 2008 January
• Merthyr Tydfil Town Centre Regeneration and associated documentation.

The discussion of the policy context in the Miller research is sufficiently comprehensive. However, it acknowledges that ultimately the policy guidance is sufficiently high level to enable the Council to apply this to its own local circumstances.

3.2 Findings

Within the qualitative findings, there were observations around:
• online parking information
• signage and wayfinding
• updating pay and display provision
• staff roles, including promoting CEOs as ambassadors and improving enforcement
• payment systems

These are all valid observations. However, there is a lack of option presentation as to the specifics of how these challenges should be addressed, in the options section.

Parking Supply and demand

This section of the report contains a baseline of parking supply, which is adequate to serve as a basis for a more detailed compilation of parking capacity in the town. Mapping needs to be improved though.

Demand drivers are discussed, including the role of the 460 space Tesco car park, which appears to have a pivotal role in the outcome of this study. The survey results mainly report obvious findings, such as that workers park all day whilst shoppers tend to park for 1 to 2 hours. It also reports that people prefer not to pay for parking, citing the reason that they ‘.. are spending in the town so shouldn’t have to pay to park’.

Revenue and tariff analysis

This section contains some analysis from data provided by the Council, but does not include insight or intelligent observation on the data. Some assumptions included are rather vague. This section of the report needs to be started from scratch with up to date data and mode robust conclusions resulting from a stronger evidence base. The example and reference sites shown do not link to the recommendations. It is not clear why Bedford is included.

Scenario testing

The first scenario is not sufficiently developed, since there are a range of strategic and tactical options which can be brought to bear, without providing free 3 hour parking. It is clear from the survey results that moving to free 3 hour parking will result in a significant reduction in revenue. It is not however, demonstrated in the report as to why this is desirable. The proposed tariff increases (equivalent to 111%, not 211% as described in the report) will have a deterrent effect on longer stay parking and will reduce demand. No elasticity analysis is presented that quantifies this in a credible way. The report itself notes ‘this simplistic analysis does not consider the price elasticity of demand for car parking’.

Review of previous research
This may be because the researchers did not have the expertise to quantify parking elasticity.

The third scenario of designating parking for particular purposes is not entirely without merit, but there are a number of complexities in achieving this. In a typical mixed portfolio of off street and on street parking with leisure, shopping and employment uses, it is more usual to encourage the desired usage through short / mid / long stay tariff strategy and good information / signage, rather than insisting particular users park in designated car parks. All in all, the conclusions of the report are sometimes merely suggestive and sometimes speculative and do not provide a sufficiently robust basis on which to drive strategic actions.

3.3 Commentary on Miller report findings

The narrative below describes the findings of the Miller Report and comments on the extent to which they are valid and should be included in the strategy.

1. Communication

The report notes that more integrated communication of parking information is important. It recommends a multi-channel approach with better physical signage and an enhanced web presence that provides parking choices within the tourism offer. It recommends a focus on physical directional signage improvements in the short term, with the potential for variable message signage in the future. The report also recommends updating the pay and display signage to make it clearer and promoting the cashless system.

Comment: this is correct. When approaching the town from either the A465 or A470 it is not obvious to visitors who do not know the town how to access the most convenient car parks. For approaches from the A470, the St Tydfil car park is the most convenient, whilst arriving from the A465, the Castle Street car park should be promoted. This reduces overall traffic circulation and gets visitors to the closest car park the quickest. An overall review of signage should include the signs at the payment terminals in the off-street car parks, which should have the cashless payment information integrated within the overall payment advice.

Recommendation: improved signage to the town centre car parks should be a priority as part of an overall communication of the changes in the town road layout and car park supply.

2. Resources

The report recommends addressing deficiencies with the Civil Enforcement Officer equipment. It also recommends that the pay and display machines should give change and should accept credit / debit cards.

Comment: it is believed that the equipment issue has been addressed. Pay and display machines in the UK do not give change and overpayment is a reality in all Local Authority areas. With the current all day tariff of £3.50 (it was £3.80 when the Miller report was written) there will be fewer issues of overpayment. Card payment is also available, either through the new Metric Aura machines, or through the Phone and Pay system.

Recommendation: no further action is needed in response to these comments, however the cashless system should be promoted and the fee absorbed, as described elsewhere in this report.
3. Enforcement
The report recommends training for the CEOs and also to adopt ‘a consistent approach in dealing with marginal circumstances’

Comment: It is not clear what inconsistency is meant, but it is reasonable to believe that the reference is to the problems with goods only loading. This is dealt with later in this report. Observations of the CEOs appears to demonstrate that they are competent in their duties and are capable of effectively exercising both consistency and discretion in their enforcement activity.

4. Payment
The report recommends replacing all the ‘outdated’ pay and display machines and also promoting the flexibility of being able to park in multiple car parks. It recommends incorporating cashless payment information into signage and also considering pay on exit systems.

Comment: the Council will be aware of the relative reliability of the pay and display machines. There is no specific need at present to replace the Metric Accent machines with new Aura machines. Priority should be given to promoting the cashless system, including absorbing the 20p fee. The ability to top up parking provides the benefits of pay on exit systems. Pay on foot barrier systems are not suitable for Merthyr Tydfil and are not necessary.

5. Supply
The report notes that supply is adequate for demand, but that town centre users parking in residential streets and other locations understates demand. It notes that cost is the key driver behind parking in residential streets. It also notes the goods loading only issue and the problems caused by the excessive number of taxis. The report identifies the possibility of changing loading restrictions and notes that this may have implications for delivery patterns. It suggests more free 30 minute short stay in Castle Yard. There are further comments around provision of parking for coaches, touring caravans and HGVs potentially at the rear of Merthyr Leisure Centre. It notes that event parking is well managed.

Comments: the report correctly identifies that current parking in residential streets and other locations (it does not specifically mention Merthyr Tydfil Leisure Village) are causing the demand for parking to be understated. It does not address the need for Controlled Parking Zones and the introduction of restrictions at MTLV to address this, stating that the Council is already managing this through new Traffic Orders, which is not correct. Whilst it acknowledges the economic incentive that results in use of uncontrolled streets, It fails to understand that the solution to this is not to introduce free parking in the town as it later goes on to recommend, but to control the residential areas that are subject to parking by non-residents and implement controls at MTLV.

6. Demand
The Miller report comments on patterns of parking at off-street car parks and correctly notes that all day parking occurs at the Castle Street and St Tydfil car parks. It concludes that the lack of available parking after 09.00 is the key driver of use of the Tesco car park. It suggests Gilar Street is under used and Swan Street is occupied by employees with Blue Badge parking, but does not suggest any action in response to these observations. It
proposes consideration of Travel Plans for major employers and also ‘zoning’ of car parks. It notes that parking for Theatr Soar visitors is relatively limited. It also introduces the idea of short duration (e.g. term time) parking for college users. It notes the key role of the Red House in generating visitors and advocates improvements to walking routes between car parks and town centre attractions.

**Comments:** there are some useful observations in this section, however it again fails to recognise that the reason people park in Tesco is that it is free, not because of constraints of other car parks being full. Travel Planning is a useful tool to assist in generating understanding of options for access to work and education and therefore would be useful if undertaken by the Council in partnership with Merthyr College and the Welsh Government initially. This could be widened further in the future. However, a resource is required to manage this and it is not clear that the Council currently has such as resource. This may therefore be a medium term objective.

The concept of zoning is introduced but not developed (until later in the report). It is not clear at this stage what zoning means and whether it is a differential pricing proposal or a designation of parking for specific purposes or target user category. Ultimately, the section dealing with demand does not provide concrete and specific recommendations for action.

**Recommendations:** work carried out within this strategy in addition to reviewing the Miller report demonstrates the wider complexity of peoples’ decision making and the need to recognise price sensitivity, whilst seeking to protect Council parking revenue budgets.

### 3.4 Further Report Sections

**Where people park**

This section outlines capacity at off-street car parks and also mentions the Leisure Village, Tesco with some commentary about each. There is a section on the Welsh Assembly Government building, which acknowledges that their staff park in the Leisure Village (and the highway at that time since controls had not yet been imposed). A map of 5 minute walking time zones in relation to car parks and the town centre is also included. The overall conclusion of this is that all town centre car parks are in reasonable proximity of the town centre.

**Comment:** the observations within this section are relatively straightforward and broadly accurate, however there is no recommended action to address the issues outlined. It notes that the Council is considering the control of streets and the Leisure Village but does not comment on the desirability of such measures and the potential impact of them.

**Research findings**

This section outlines the results of the primary research carried out by Miller. Main conclusions of the town centre users survey are:

- A large majority of town centre visitors park in Tesco;
- St Tydfil (College) is the most popular Council town centre off-street car park;
- Most (74%) employees park in Castle Street or St Tydfil (College) with 11% parking in uncontrolled streets;
- Town centre visitors seldom use the on-street short stay provision and prefer Tesco.
The issue of on-street loading restrictions is highlighted again here, with a proposal to allow goods loading only between certain hours and limited stay for other times. The forthcoming (now complete) construction of Penderyn Square is also discussed, as is the future Ty Gwyn car park. Further analysis of the primary research arrives at some self-evident conclusions that:

- People like to park for free
- They prefer to park nearest their place of work or shopping destination.

However, the primary research analysis does contain a segmentation of time spent in the town by visitors. This should that 81% stay for less than two hours. The research also outlines the reasons that people believe that they should not have to pay for parking in the town centre, which are

- We are spending money in town
- People will be put off
- We pay council tax
- Out of town parking is free

It is also reported that the provision of a safe pedestrian environment is a high priority for town centre visitors.

Revenue
The Miller Report includes an analysis of Council car park usage and revenue. It notes:

- Half of Council revenue comes from the College car parks;
- The main College car park is full during the day, resulting in shoppers using the overflow car park;
- A majority of Council parking revenue comes from ‘all day’ long stay employee parking;
- The Leisure Village capacity is not under pressure in the daytime
- Swan Street and Gilar Street derive most of their revenue from short stay.

The report discussed the changes in progress at the time – now completed – resulting in the replacement of the College car parks by the St Tydfil and River Taff car parks. It does not at this stage make recommendations as to actions.

Comparison towns
Miller Research chose Bedford as a comparator town. It is not clear why this was done, since there do not appear to be any useful comparisons between Bedford and Merthyr Tydfil, other than that Bedford also has a Business Improvement District working to encourage visitors to the town.

The report also outlines parking in Monmouthshire and Blaenau Gwent, which are described as bland but functional and also the more retail orientated website of Cwmbvran shopping centre (which has a 3,000 space multi-storey car park, which is free all day). Herefordshire County Council’s adoption of the Parkmobile system is also discussed.
There is a table of charges in five other Welsh towns. Whilst this table does provide some comparison, it is not clear why these towns have been chosen, as opposed to any other towns in Wales or elsewhere. The policy of designating short and long stay within a single car park is also discussed, as in Carmarthen. Rhondda Cynon Taff’s pricing strategy of controlling short stay by charging a higher tariff for longer duration rather than restricting the parking duration itself.

**Comment:** this section does not have a clear rationale as to why it has chosen the various comparators and they do not have a specific relevance to car park policy or pricing in Merthyr Tydfil. However, the tariff comparison table is useful and has been updated in this report. One conclusion of this section is that other Local Authorities have a slightly more complex series of tariffs. However, the report does not comment on whether this is good or bad and what implications this has for Merthyr Tydfil.

**Scenarios**

The Miller report presents three scenarios:

1. Do nothing
2. 3 hours free and compensatory price increases
3. 3 hours free and categorisation of car parking

Broadly, the description and outcome of these scenarios is as follows:

**Scenario 1: Do Nothing.** This scenario suggests that the Council will gain an approximate additional £100k in its parking margin, but does not explain why. It admits that the impact of the car park reconstructions are not taken into account in this estimate.

**Scenario 2: ‘Free for Three’** the rationale for providing three hours free parking is that this fits with the preferences of town centre users. This option also looks at making 2 hours free, with a slightly lower loss to the Council. In order to control this free duration CEOs would have new hand held devices to record vehicle number plates, although no increases in cost are assumed. Under ‘Benefits’ a loss to the Council of £334k is estimated. In order to offset this loss, tariff increases to £8.00 all day and £4.85 for 4 hours are suggested.

The report admits that no elasticity has been taken into account. It notes that the lost revenue would be made up ‘assuming no change to car parking behaviour’. This is a significant flaw in the report’s conclusions. Due to the number of variables (for example the varying value of time against value for money amongst populations) there is insufficient research to provide robust elasticity for all scenarios.

However, all consultations and survey results, both those from Miller Research and also in this report, conclude that there is a high degree of price sensitivity in Merthyr Tydfil, suggesting that the higher levels of elasticity might be applicable to the town. In the revenue modelling section of this report, elasticity has been modelled at -0.81.

Therefore a more than doubling of price, in isolation of any other actions would lead to a large loss in parking volumes and a high degree of negativity amongst users and stakeholders and would be simply unsupportable. The report admits that this option is not workable and does not recommend it.

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5 Elasticity is the impact on demand caused by changes in price, see Section 2.4
Scenario 3 : ‘Free for Three’ and categorisation of car parks

This Scenario is similar to Scenario 2, however it seeks to categorise car parks into Shoppers and Workers zones, with different tariff structures for each. Car parks such as Tramroad and Pontmorlais would have capacity split between the two categories and others would be designated as either shoppers only (Gilar Street, Castle Street surface car park) or workers (Castle Street MSCP, River Taff, a selected area of MTLV).

There is a lengthy, but not wholly convincing narrative around tariffs and season tickets which seeks to demonstrate that this scenario will provide a successful balance between the needs of town centre employees and shoppers.

Ultimately, the ‘Free for Three’ approach is justified in the calculation of the additional footfall and consequent expenditure in the town, estimated at between £1.6m and £3.5m per annum. This is based on the survey of town centre users, 58% of whom state that they would visit the town centre once more per annum. This is extrapolated against the estimated 460,000 annual visitors in 2012. An assumption is made that £12 will be spent during each visit, based on the South East Wales Visitor Survey 2008-09. However, the town centre survey did not include a question on expenditure and it is not clear that the £12 is justifiably transferrable to all town centre visits.

Comment: The Scenarios outlined in the Miller report only represent two basic perspectives, that of ‘do nothing’ against the provision of three hours free parking, with a mitigation of either a large long stay price increase, or a categorisation of car parking capacity as either worker or shopper capacity with a large increase. There are a range of other potential interventions as part of a wider strategic approach to parking in Merthyr Tydfil that are not developed.

The report correctly identifies a number of issues and also reports accurately about peoples’ current parking activities and attitudes. However, it ultimately lacks a coherent framework of guidance to enable the Council to optimise the use of its parking supply. Its rather radical and revolutionary approach to completely changing the parking mix in Merthyr Tydfil is not supported by compelling arguments.

In any event, if free parking did result in increased visits to the town centre (although the volumes claimed are not convincingly demonstrated), and if the average spend per visit was correct (although this is also somewhat unconvincingly argued) the loss to the Council would not be made up through additional long stay parking charged at a higher rate. The multiple caveats at the end of the Scenario section demonstrate an understanding that the impacts of the proposed changes are highly unpredictable. However, the report does correctly report that the Council provides a high level of discount, which it proposes is immediately reduced. It makes more sense, given the price sensitivity of Merthyr Tydfil residents and employees, to do this progressively and only once Residents Permit schemes are implemented in uncontrolled streets.

3.5 Summary of Miller recommendations

The following section contains the recommendations that are proposed in the Miller Report with comments as to which of these are deemed as currently worthy of taking forward.
1. To develop a communication strategy on parking in relation to wider destination management, town centre management and economic development investment campaigns; strategy and delivery programme to look at:
   a. ICT multi-channel approach
   b. Advanced and directional signage from main road network
   c. Site information
   d. Face to face contact – town ambassadors/wardens, etc.

   **Comment:** Recommendation 1 is fully supported. This should be taken forward in partnership with the BID as part of a relaunch of parking.

2. To invest in Civil Enforcement Officers in relation to equipment, training and integration with other town centre front line staff and services in terms of customer care, town ambassadors and signposting to other Council services;

   **Comment:** Recommendation 2 is not supported. The CEOs are competent to carry out their core role of parking enforcement. Specific customer service training is not required.

3. To review current parking infrastructure in terms of signage, information, lighting, environmental quality, condition of pay and display machines in light of pricing policy recommendations and any capital investments arising from these changes;

   **Comment:** Recommendation 3 is partially supported. Since the completion of the Castle St MSCP, St Tydfil and River Taff car parks, the quality of the Council’s parking stock has already improved. However, signage does need improvement as noted in Recommendation 1.

4. To review existing payment methods and look at ways of introducing credit/debit cards as well as widening the promotion of the pay by phone system;

   **Comment:** Recommendation 4 is partially supported. The priority should be the promotion of the cashless system. No investment should be made in upgrading the pay and display machines, unless selected machines are life expired and beyond economic maintenance.

5. Develop a targeted campaign amongst local business owners to make them appreciate the importance of freeing up parking spaces for customers, and to actively encourage staff to park in ‘workers’ car parks (those designated as such by the Council i.e. College South) rather than ‘shoppers’ car parks;

   **Comment:** Recommendation 5 is not supported. There is no evidence that business owners and their employees are likely to ‘free up’ space for customers. The option to categorise parking capacity into workers and shoppers is not supported.

6. To work with employers and employees in finding alternative ways to travel into town centre that is part of an incentivised sustainable travel plan for the town by instigating car sharing / public transport initiatives; this could involve free public days for employees who reduce the number of times they drive to work as well as incentives such as the UK Government’s cycle to work scheme.

   **Comment:** Recommendation 6 is supported, subject to the Council identifying a suitable resource to implement a Travel Plan, this should initially be carried out in partnership with the Welsh Government and Merthyr College and if successful, widened to other target groups.
7. To develop parking provision for specific users, such as coaches, HGVs and other users in terms of visitor management, layover and welfare facilities;

**Comment:** Recommendation 7 is partially supported. There may be an opportunity to accommodate coach parking, for example at the rear of the Leisure Centre. However, it is not recommended that the Council provides layover facilities for HGV drivers.

8. To review on-street parking orders in relation to loading requirements specifically within Glebeland Street, Victoria Street and High Street to ensure businesses can service their operations using a smaller domestic vehicles as well as larger commercial vehicles;

**Comment:** Recommendation 8 is fully supported. As is evidenced from the town centre surveys in Section 7 of this report, the current goods only loading bays are not serving a sufficient purpose for the town centre and should be replaced by dual loading / short stay bays with no vehicle category restrictions.

9. To review the provision of residents parking around the town centre ensuring that the potential knock on effect of changes do not impact on neighbouring residential streets.

**Comment:** Recommendation 9 is supported, since this report (see Section 6) has further investigated the experiences and opinions of residents and makes recommendations for extension of Controlled Parking Zones in the Georgetown and Ynysfach areas.

10. To support the development of any smaller short off street provision where land becomes available which supports a convenience culture for shoppers in terms of accessing local shops and businesses, e.g. Church Street / John Street parking proposal;

**Comment:** Recommendation 10 is supported and the Ty Gwyn car park is close to completion and will provide useful short stay provision. This should however be managed through the provision of the installation of a Metric terminal with the issue of a 1 hour ticket free of charge, thus enabling effective enforcement. Further short stay provision should be considered as emerging developments such as the bus station relocation take shape.

11. To investigate the feasibility of supplying two new long stay car parks near to the Orbit Centre/Welsh Government and at the Limekilns site for workers use. This will be essential to meet future demand.

**Comment:** Recommendation 11 is not supported. There is no evidence yet that the parking supply in Merthyr Tydfil will be insufficient to meet demand. If controls are put in place at the Leisure Village and Controlled Parking Zones are implemented in Georgetown and Ynysfach, the situation should then be reviewed. It is not the responsibility of the Council to provide car parking for Welsh Government employees to make up for under-provision at the current building.

12. To implement scenario 3 – Free for Three, which would allow free for three parking in all town centre car parks to encourage shopper and visitors to the town whilst discouraging all day parkers from key town centre car parks by placing high day charges on said key shopper / visitor car parks and low all day charges on strategic edge of town car parks. Zoned or categorised car parks would be designated that would help in terms of managing specific users and ensure a quality, integrated town centre experience.
**Comment:** Recommendation 12 is emphatically rejected. Feedback from key stakeholders supports the view that the viability of the town centre depends on wider factors, primarily the quality of the public realm and the existence of reasons to visit, whether this is the quality of retail outlets, or cultural attractions such as Red House and Theatr Soar. Free parking alone will not ensure future viability of the town centre and is financially unsustainable for the Council. To attempt to increase parking tariffs for employees would be damaging and counter-productive in revenue terms. Additionally, categorising capacity for specific purposes is confusing and highly unlikely to result in efficient allocation of parking supply.
4 Consultation with Council and external stakeholders

Phase 2 and 3 of this research project consisted of consultation with key stakeholders within the Council and also in the wider community. Whilst some common themes emerged, there was also somewhat of a divide between the views of Council officers responsible for operation of parking and the management of budgets and those, both within the Council and in the wider community, more concerned with successful regeneration. However, there was a consensus that the research needed to be balanced and acceptable to the council as a whole in order to be successfully adopted.

4.1 Council officers and departments

Meetings were held with:

- Director of Customer Services
- Head of Service Support
- Town Centre Manager
- Engineering & Traffic Group Leader
- Regeneration Manager
- Leisure Service Manager
- Council Solicitor

Additionally, a Steering Group was established consisting of the Town Centre Manager, the Head of Service Support and the Engineering & Traffic Group Leader, to facilitate the research.

During consultation with Council officers, feedback at a senior level was given on the Miller research report. Specifically, whilst the report provided evidence of aspirations of the business community to provide free parking as a means to attract visitors to the town, it had failed to identify a suitable strategy to make this financially sustainable for the Council.

The Council also needs to establish a fair regime for its employees. Those who have moved to Pentrebach, or who work at the Leisure Centre have free parking, whilst those working in the town centre have to pay. Unit 5 Pentrebach may have a parking issue due to the number of council vehicles parking there, (whilst there is no issue at Unit 20 where the engineering functions are located). However, a charging regime at Pentrebach would have a negative impact on the adjacent retail units and would require an operational regime that would require participation with the retail park / industrial estate. Therefore, this is not currently a priority area, but the Council wishes to keep this under review in the future.

Officers working on regeneration in the town appreciated the competing requirements for the outputs of the study and the need for all Council stakeholders to be able to buy into the report and its recommendations. It was recognised that free parking for three hours as recommended by the Miller research was not achievable. It was felt that, in any case this was not in itself a solution since the offer to attract visitors has to be of sufficient quality
and parking charges are only one element in people’s decision making. However, there was strong support of the idea of a lower rate short stay tariff rather than the £1.50 at present.

Key feedback areas included:

- Car park revenue has declined and is below budget for 2014/15. The Council primarily attributes this to the reduction in car park capacity during the construction of the Castle street multi-storey car park and closure of the former college car parks, and also the disruption to the town caused by the extensive roadworks.
- The extent to which the change in tariffs in April 2013 has impacted on revenue is uncertain.
- The town has also suffered some additional challenges that will have impacted on footfall generally and are likely to have contributed to declining parking revenue, including:
  - Large numbers of Council staff moving to Pentrebach;
  - General economic circumstances and lack of disposable income amongst the wider community, resulting in a high degree of price sensitivity amongst town centre visitors;
  - A change in the retail offer in the town, including relocation of key retailers to Cyfartha Retail Park or Pentrebach, such as B&Q and Peacocks and closure of others such as WH Smith and Superdrug;
  - The general impact of the Cyfartha Retail Park, which is more fashion orientated has also lured several key retailers from the town centre and will be home to the second largest M&S in Wales in the near future;
  - Relocation of the Hollies Health Centre to Cyfartha and the police service to the ‘Welsh Government Quarter’.
- Cumulatively, these changes will have reduced the numbers of people driving into the town and contributed to the decline in parking revenues.
- Conversely, investment in regeneration is producing reasons for people to visit Merthyr Tydfil, including the refurbished Red House, the Theatr Soar, the improved pedestrian environment and the higher quality ambience of the public realm;
- Additionally, significant efforts are being made, with some success, to encourage visitors to the town centre through putting on festivals such as the food and chilli festivals.
- The town also remains a centre of employment, but anecdotal evidence gathered during the consultation process suggest that many employees are reluctant to pay car park tariffs, even the discounted permits, and would rather park in uncontrolled streets or Merthyr Tydfil Leisure Village and walk into town. This includes Council employees.

The Council needs to make all reasonable endeavours to improve its revenue position by implementing the optimum tariff strategy. However, there is a strong imperative to ensure that the parking strategy facilitates the continued regeneration of the town, reflects peoples’ ability to pay and is seen to be fair.
Whilst these out of town developments may be seen as detrimental to the vitality of the town centre, the context is that there had been a lack of land for development within the town centre (although there is land available now). Specifically, the current bus station, which is owned by the Council, is intended to be moved to the old Hollies / Police site, providing a prime development opportunity, which is currently being explored.

### 4.2 Council Leader and Elected Members

**Council Leader**

A meeting was held with the Leader of the Council, who provided helpful historical context and guidance on the priorities for research, supporting the need to investigate the displacement of parking into local streets. The Leader explained his long involvement with parking since before charges were introduced in 1999.

Discussion areas included pavement parking. Apparently a report was produced by the Council last year. There was extensive discussion around residents permit parking and the potential for the Council to introduce further zones in addition to Zones A and B. The Council Leader wanted to be kept informed at appropriate times to ensure that the outcome of this work was appropriate to the Council’s needs. He was conscious of the need for financial viability of any study as well as support the BID and town centre. He is a representative of the Council on the BID so understands the need to balance the priorities of regeneration and meeting Council budgets.

**Elected Members**

A communication was also sent by the Portfolio member to all elected Council Members advising them of the study and requesting any views to be fed back either directly to the consultant, or via the Portfolio member. A reminder was sent several weeks later. However, no feedback has been received from any elected members.

### 4.3 Parking team and Civil Enforcement Officers

There was a wide ranging discussion with the Parking team and the Civil Enforcement Officers (CEOs). Topics covered included:

- Parking at Merthyr Tydfil Leisure Village
- Welsh Government Building parking
- Designation of short stay and loading bays in town
- Resident permits and parking overspill
- The Castle St surface and MSCP car parks
- Other car parks in the town
- Tariffs
- The Phone and Pay cashless system

There was a high degree of enthusiasm amongst the CEOs, who are clearly engaged in their role and can see a numbers of issues that could be improved.

**Residents permits**
The CEOs were of the opinion that the existing residents permit scheme is abused, since a VRM designated permit is issued to residents, along with a non-VRM designated visitors permit, that is open to abuse (both cost £34). There are allegations of some being sold on, of residents who don’t have a car being encouraged to apply for visitors permits for non-residents to use. The CEOs feel that they do not have the resource or support to investigate this issue in sufficient depth. It is therefore difficult to quantify the extent to which permits are abused. However, it is clear that the parking supply within the residents permits areas (A&B) are often insufficient to meet demand and cars with valid permits are issued with PCNs for parking on restricted streets. This may be due to abuse of permits, the number of two car homes, or the lack of on street capacity generally. The CEOs felt that there may be a possibility to share capacity between the zones.

Welsh Government building

The CEOs believe that all staff are issued with permits, but the site is available on a first come first served basis. Some spaces are reserved for VIPs / senior staff and also for ministers from Cardiff who come on a regular basis, believed to be Tuesdays. Given the use of the adjacent On St capacity by WAG staff, which had caused highway safety issues, the Council had implemented a short and long stay restriction with pay and display Machines and signage. This had been contentious and the CEOs had currently been told not to enforce this area. The CEOs believe that the overwhelming majority of the employees at the WAG are not local and mostly commute from the Cardiff area. They have no real connection with the town and are unlikely to visit.

Phone and pay

The CEOs were not happy with the Bemrose Booth Phone and Pay cashless system, which they believe is unreliable and unpopular. It is used by no more than around 20 people per day, all of whom are regulars. Since the system is not currently integrated into the handheld devices that the CEOs, they have to separately interrogate an additional device to verify vehicles paid for by the cashless system. This is time consuming and does not happen in many local authority areas. The perception of fragility of the cashless system may undermine both its future adoption and also the ability to undertake effective enforcement. The CEOs also receive text messages from the parking office when there is a problem, for example with the P&D machines, or the cashless system). Before issuing a PCN therefore, they often have to interact with 3 devices as well as look at the car windscreen. It is alleged that when customers call the cashless provider directly, they are told to wait, or ‘not to worry about it’. Note: this is disputed by the cashless provider – see separate consultation below.

Tariffs

The CEOs report that they receive negative feedback about the tariffs – particularly the £1.50 starting tariff. They believe that many people using the town perceive this as being too high and would welcome a reversion to the previous tariff strategy of a lower hourly figure (e.g. it used to be 70p) and then a graduated tariff. This might – in their view – encourage people not to park in Tesco where they get 2 hours free parking, so might encourage use of the Council’s car parks.

Castle Street

The CEOs believe that most people parking in the Castle St MSCP are employees and have permits. These are heavily discounted (monthly is £38, annual is £350), but still – in
the CEOs opinion – too expensive for some people. They believe that a number of permits have been surrendered and people are parking in streets or the MTLV and walking in. Georgetown was mentioned as an area where it is known that many Council employees park. The CEOs were sceptical as to whether residents would be amenable to having a residents parking zone implemented. The CEOs suggested that perhaps the most advantageously placed spaces in Castle Street might be reserved for shoppers. It is believed that permit holders (who arrive earlier) currently take the best spaces.

There were other factors that the CEOs felt were relevant to the take up of chargeable parking in the town. Many of the regular visitors to the town are amongst the more elderly population and have free bus passes and don’t drive in. This is in contrast to younger local (and regional) residents who may patronise the Cyfartha Retail Park and will drive. They may not be using the town centre any longer or as regularly due to the changing nature of the retail offer in town in comparison to Cyfartha. The CEOs believe that it is difficult to see a rationale for staying in town for more than 2 or 3 hours, unless you are employed there. These factors, plus the changes to tariffs and the disruption to the town’s parking capacity (Castle St MSCP construction and College car park closure) have reduced the demand on parking in the town, which may take some time – and the right interventions to recover.

It is also suspected that some car sharing activity is happening, with multiple visitors to the town arriving in a shared vehicle, either for work or other purposes. The CEOs remarked that Merthyr Tydfil lacks attractive nightlife – it used to be vibrant with several clubs. Now even the remaining pubs and the single club are rather run down and unattractive especially to younger residents, who will go to Cardiff or elsewhere. The CEOs were of the opinion that Cwmbran is thriving but were not able to definitively identify why.

Blue Badge Parking

There was extensive discussion around Blue Badges. Currently, Blue Badge spaces in car parks are chargeable (there is a dedicated Blue Badge car park in Swan St). However, since Blue Badge holders can also park on single or double yellow lines, (unless a loading restriction is displayed) there is little incentive for Blue Badge holders to take up these spaces. There was a discussion about charging for Blue Badge spaces, currently these are the same as for all users. There is a school of thought (from the disabled motoring lobby) that since it may take users with a mobility impairment more time to carry out the same activity, additional time might be given to Blue Badge holders for the same tariff, to prevent inadvertent discrimination.

On-street provision

Some bays in the town are marked out as goods loading only. This causes some difficulties and confusion and – particularly when traders are loading using non ‘goods’ vehicles, some discretion in enforcement is needed. The CEOs have views about which bays might be re-designated for example as dual bays. There are also a mixture of 20 minute and 30 minute short stay bays, this needs a consistent rationale.

Parking team

The parking team undertake activity on behalf of neighbouring Rhondda Cynon Taff County Borough Council (RCTCBC) as well as MTCBC. They believe that parking is a specialism and that a certain level of expertise is required to effectively manage and administrate parking services and that this should be a self-contained activity within the
Council and not merged within general Council administration functions as a disproportionate level of training and supervision would be required to maintain standards. This is particularly important in the management of appeals.

The team operates the Imperial Civil Enforcement Services (ICES) Parking Gateway software to manage the back office processing of Penalty Charge Notices. It is felt that the number of PCNs issued by RCTCBC is increasing whereas those issued by MTCBC are declining. This should be studied further to see where the differences are. The team believes that RCTCBC is happy with their service and that it generates a surplus for MTCBC.

### 4.4 Business Improvement District

Two meetings were held with key representatives of the BID. The BID was involved in the previous study and strongly supported free parking or at least the lowest possible cost of parking for town centre visitors. The BID believes that there is inadequate promotion of the Castle Street MSCP for visitors. The reduction of the capacity during the works to refurbish the St Tydfil and River Taff car parks in conjunction with the roadworks has resulted in greater difficulty for visitors and shoppers to easily access the town centre.

Since the Council is unable to support the previous recommendation for three hours free parking in the town centre, the BID would like the current tariff structure to be changed to allow a short stay one hour tariff to be reintroduced. It would like this to be at the lowest possible level and would support a tariff of 50p. The BID would point out that in Caerphilly, there are charges of 50p for an hour, £1 for 2 hours and £2 for 4 hours.

The BID also believes that there is a lack of awareness of permit parking availability and that many people believe that only the Council employees are able to purchase these. It is not the role of the BID to comment on the provision of long stay parking for employees of other than BID members, but it is important that there is adequate, affordable long stay parking for retail employees as well as short stay parking.

There is a perception – particularly for those from outside the town - of a safety and security issue, although there is little evidence of an actual crime problem, particularly one relating to parking and vehicle / motorist safety.

### 4.5 Welsh Assembly Government

Two separate meetings were held with the Estates Function of the Welsh Assembly Government building to discuss the parking capacity and usage of the WAG building car park and the level of use by WAG staff and visitors of capacity outside their parking area.

The building was established in 2006 and currently has 550 – 600 employees, but will not expand further. It provides a range of support services including housing, local government and communities and the European Funding office. Parking was provided in line with sustainable transport policies and is not sufficient to meet current demand.

The origin of the employees at the WAG building is diverse, but many come from the Cardiff area each day, some from the local MT area and some from other wider origin locations. Public transport provides limited options for employees and is unsuitable for most, hence the demand for parking is high. The 256 space car park is regularly full. The priorities for parking are:
• Staff
• Blue badge
• Welfare
• Contractors
• Visitors

With the lowest priority being placed on visitor parking. Allocation of parking spaces is intended to meet as closely as possible all categories. It is understood by the WAG that currently, due to pressure on the car park, many staff or visitors will take advantage of the free parking at the MTLV.

Formerly, the on street capacity on the road leading up to the WAG building was being used and this was causing highway congestion and safety issues. The WAG accepts that it is appropriate for MT to wish to control the highway and impose charges. However, it strongly believes that all the available capacity should be available for at least 4 hours. Currently, it is split into 2 sections, one is long stay and has all day availability, but the closest section is limited to 2 hours. At the least WAG wishes this to be available for 4 hours. It is little used at present, since most visitors will stay for longer than 2 hours.

The adjacent Orbit centre does not have capacity, although very occasionally by arrangement, it permits WAG users.

The core hours of the WAG building are 09.00 – 17.00, although the building is open 07.00 – 19.00. It has been suggested to WAG staff that – since some capacity at the WAG building car park becomes available during the afternoon – they park in the MTLV and then walk down later in the day to retrieve their vehicle. However, the take up of this idea has been extremely low and there is no evidence of anyone currently doing this. Additionally, there have been some occupational health complaints due to the gradient of the road being rather steep for staff with a mobility impairment.

A discussion was had around the actual number of WAG staff who currently park in the MTLV. The Facilities Manager believes that it is more likely to be in the region of 50 a day, but acknowledges that there is no actual data relating to this.

Discussions with the WAG were also undertaken about the potential for the Council to offer a discount for Permits at the soon to be opened River Taff car park. This was enthusiastically received in principle. However, there are issues around perception of personal security in relation to the pedestrian path between the River Taff car park and the WAG building. It is believed that some employees would be reluctant to use this path during the hours of darkness, which would have an impact on willingness to park I River Taff during the winter months. The WAG preference is therefore to have a discounted permit for a shorter duration than one year. Discussions have been held with the Council regarding these security concerns, but the Council has responded that it believes that the path is constructed to appropriate standards and well lit, with CCTV coverage and there are no additional measures that it is intending to take regarding security of the path.
Consultation with Council and external stakeholders

The WAG believes that if its employees do not wish to park in River Taff they may prefer to pay a higher amount (i.e. undiscounted) for a permit at the MTLV. If this was not available it is unknown which other alternative parking choices would be made by individual employees.

*Note: as outlined above, it is difficult to quantify how many WAG employees are parking in the Leisure Village. The table below seeks to establish a potential range, against the WAG building capacity of 256 spaces. If there are 550 staff of whom 80% are in the building on a typical working day and 75% arrive by car, the overflow requirements would be for around 75 cars. However, with 600 employees, a 90% attendance and 80% car dependence, the shortfall would be nearer 200.*

<table>
<thead>
<tr>
<th></th>
<th>Employees</th>
<th>percentage attendance</th>
<th>percentage car dependence</th>
<th>Parking requirements</th>
<th>car park spaces</th>
<th>shortfall</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Low estimate</strong></td>
<td>550</td>
<td>80%</td>
<td>75%</td>
<td>330</td>
<td>256</td>
<td>74</td>
</tr>
<tr>
<td><strong>High estimate</strong></td>
<td>600</td>
<td>90%</td>
<td>85%</td>
<td>459</td>
<td>256</td>
<td>203</td>
</tr>
</tbody>
</table>

Table 3. Estimated shortfall in parking supply at the WAG Building

4.6 **Merthyr College**

A meeting was held with the principal of the College and follow up telephone discussions were held with the Head of Estates and Facilities.
The college is aware that staff and students are currently parking in streets around Ynysfach. Whilst it is not believed that college users are parked in the MTLV, if controls are introduced, these streets might come under further pressure from vehicles currently parking in MTLV (although the pedestrian route is not very good).

The college has 1800 – 2000 full time students. There are also up to 1000 part time students. The college is supported by 200 full time staff. Outside term times the usage of the college declines by around half. Students are mainly local and it is reckoned that 80% live with a 4 mile radius (although there is no actual data to support this). Only around 5% are outside a 10 mile radius. For staff around a third live within 5 miles and two-thirds within 10 miles.

It is recognised that the proportion cycling to the college is low. (An observation was made that the Sheffield stands in the new paved area outside the college are not signed and may not be obvious to all as being cycle parking). The college believes that more staff and students formerly parked in the college car park but have migrated to other modes of access or parking in uncontrolled streets, particularly since the construction projects reduced the capacity. There is a Rugby club car park that offers long stay parking at a reduced price.

**Discounted season tickets**

The college would welcome the opportunity to work with the Council to promote the new Taff River car park when it is open. Discussions have been held with a view to offering discounted permits for students and staff, with varying durations to reflect working / studying patterns. These are potentially proposed to be term time permits at a maximum discount of £230.00 for the academic year, which is a discount of 12.4% against a straight pro rata permit at the public rate, as shown below:

Merthyr college published term dates, as shown below demonstrate that there are 264 total days:

<table>
<thead>
<tr>
<th>Term</th>
<th>start</th>
<th>end</th>
<th>Working Days</th>
<th>Weeks</th>
<th>Total Days</th>
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<tbody>
<tr>
<td>Spring</td>
<td>05/01/2015</td>
<td>27/03/2015</td>
<td>58</td>
<td>12</td>
<td>81</td>
</tr>
<tr>
<td>Summer</td>
<td>13/04/2015</td>
<td>26/06/2015</td>
<td>53</td>
<td>11</td>
<td>74</td>
</tr>
<tr>
<td>Autumn (assumed)</td>
<td>31/08/2015</td>
<td>18/12/2015</td>
<td>78</td>
<td>16</td>
<td>109</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td><strong>189</strong></td>
<td><strong>39</strong></td>
<td><strong>264</strong></td>
</tr>
</tbody>
</table>

Table 4. Merthyr College term dates

These dates give a total of 264 days or 189 working days. If users had to pay the full daily tariff for the 189 working days, this would cost £661.5, or £546.00 if weekly tickets were purchased at £14.00 (see separate section of this report on season ticket pricing).

The pro-rata cost of a £350.00 annual season ticket for 39 weeks is £262.50. The Council has considered reducing this to £242.00 by direct debit or £230.00 if paid up front, a 12.4% discount.
Consultation with Council and external stakeholders

<table>
<thead>
<tr>
<th>Public annual permit cost:</th>
<th>£350.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pro rata at public rate:</td>
<td></td>
</tr>
<tr>
<td>days</td>
<td>£253.15</td>
</tr>
<tr>
<td>weeks</td>
<td>£262.50</td>
</tr>
<tr>
<td>Suggested discounted rate (direct debit):</td>
<td>£242.00</td>
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<tr>
<td>Percentage discount:</td>
<td>7.80%</td>
</tr>
<tr>
<td>For one off full payment:</td>
<td>£230.00</td>
</tr>
<tr>
<td>Percentage discount:</td>
<td>12.40%</td>
</tr>
</tbody>
</table>

Table 5. Potential discounts for Merthyr College staff and students

The rationale for offering these discounts is:

- To encourage college staff and students to use the new River Taff car park;
- Demonstrating to residents that the Council is making reasonable endeavours to address the problems caused to residents in neighbouring streets; and
- To increase Council car park revenue.

In reality, people currently parking for free are unlikely to change their behaviour unless they believe that controls to local streets are imminent and that the discounted rate is time-limited. Communications should be centred around these messages, with the reduced season tickets limited to the current financial year. The discounted season ticket should be available to all users, but specifically targeted at the Welsh Government and the College. If a Controlled Parking Zone is introduced to local streets (as recommended in this report) the discount should be progressively reduced, since users will have fewer alternatives.

4.7 Merthyr Leisure Centre

Two separate meetings were undertaken with managers and staff at the Merthyr Leisure Centre. There was some memory of the previous attempts – around 15 years ago – to implement a tariff at the Rhydycar centre as it was then known, which were not successful. It was felt that the site was under some pressure from non-users parking and that some form of control regime would be appropriate. However, this would only work if it was co-ordinated with the remainder of the Leisure Village as if it was applied to the Council owned parking only, this would lead to the remainder being filled first and this would undermine any revenue generation.

From a personal perspective the Leisure Centre managers and staff were concerned about their continued ability to park free at the site. Discussions included the operational methods of controlling the site including ANPR and the appropriate duration of free parking. It was felt that the Bowls centre was the biggest potential issue with long stay, since their matches sometimes went on for up to 4 hours. It was felt that action by the Council CEOs had been effective in deterring parking in disabled spaces without a Blue Badge being displayed, which was welcomed. It was felt that the signage designating the capacity for Leisure Centre users only was entirely ignored.
4.8 Atlantic Properties

Telephone discussions and email exchanges were held with the Director of Atlantic Property Development who has responsibility for Merthyr Tydfil Leisure Village. APD understands that the Council wishes to consider the implementation of restrictions to the currently uncontrolled parking at MTLV. It is willing to participate in such a scheme, but needs to understand the implications of this fully, for its customers and staff working for its tenants and therefore would request regular updates on the Council’s progress towards any such scheme.

It does not believe that its tenants would be open to charging for their own employees, however they would be able and willing to provide vehicle registration details of its employees to the operator of the parking. APD supported the principle of a sufficiently lengthy free period to enable users of the Leisure Village to enjoy the facilities without having to worry about paying for parking. However, APD also supports the control of long stay non-user parking, as it is aware of the extent to which the site is under pressure at peak times.

APD wishes to understand the Council’s position in relation to the establishment of a jointly owned company to operate the entire parking capacity at MTLV and the Council’s legal views as to how this would be established.

4.9 Merthyr International Bowls Club

Two separate meetings were held with senior representatives of the Bowls Club. Some history of the relationship between the Bowls Club and the Council. There had been some administrative difficulties in the relationship in recent years but this had been resolved and resulted in the letting of a 20 year lease. The Bowls Club had given up their outside court to enable a football pitch to be installed. If the intention to implement charging had been known at the time of discussion, the Bowls Club would have wished to enshrine some parking rights within their lease. However, the Bowls Club appreciates what the Council is attempting to do by controlling parking and it supports this in principle.

The Club is active every morning and has 300 members. Each Wednesday, there is an away team visit which lasts around 4 hours. Since visitors often arrive early and stay for social activity afterwards they stay more than 4 hours. Since the matches commence at around 13.00, the Bowls Club argues strongly for a 17.00 finish to any parking restrictions. This would deter all day parking – a strategy that the Bowls Club supports – whilst enabling their operation to be allowed to continue without detriment. They believe that it would be impractical for their visitors to have to keep an eye on the four hour limit and then have to go out to the payment machine to queue up to buy a parking ticket. They do not believe that their users, who are mainly elderly, would be able to pay through online or phone in these circumstances.

The Bowls Club is a Company Limited by Guarantee. It would wish to engage with the operator of the parking at the Leisure Village to negotiate a certain number of permits for its employees, who are volunteers, at a reasonable rate.
4.10 Police Service

Consultation with the Local Policing Inspector suggests that the new police station appears to have just about adequate parking for the staff and visitors, although it occasionally comes under pressure. The Custody Suite car park is for staff on a first come first served basis with only senior management and operational vehicles having protected parking within the secure compound. It is not believed that police offers or staff currently park in the Leisure Village or uncontrolled streets, although it is felt that occasional use is made of the on-street spaces on the road opposite the Welsh Assembly Government side gate.

The Police Service believes that the number of users of the Custody Suite is not likely to significantly increase in the foreseeable future. However, if this was to happen there may be some overspill to the adjacent parking areas during peak hours.

4.11 Tesco

A meeting was held with the store manager. The store has around 60,000 customers a week, this is higher than a typical store of this size (80,000 square feet), although the spend per basket is lower than the national average. Tesco recognises that there are a substantial number of vehicles using the car park that are not shopping in Tesco and are taking advantage of the 2 hour free duration. It is likely that there may be challenges to the use of the store on Saturdays and potentially on Tuesday (market day).

Figure 2. Tesco car park

Currently, there are two pieces of work in progress to assist in the better operation of the car park:

- Enhanced enforcement: currently 3 warning letters are issued to those who overstay this is to be reduced to 1 letter than a postal parking charge notice.
Consultation with Council and external stakeholders

- Control of the front of store roadway. This is currently heavily abused by motorists and this causes potential pedestrian safety issues. A contractor is being sought to provide some control over this area.

Tesco has corporately attempted to implement parking controls relating to proof of purchase previously around the UK and has tried a number of methods. Due to evidence of customer dissatisfaction outweighing any gains of released parking capacity, it is not currently foreseeable that Tesco would implement any such controls at Merthyr Tydfil.

Tesco believes that the road works have impacted on usage of the store, traffic can back up to the extent that free flow of roundabouts is affected. Tesco would support some free short stay parking in the town centre, but appreciates that the Council has financial objectives to meet. It believes that the implementation of a cheaper short stay tariff might encourage some people out of the store, particularly during the busiest peak times, this may also have highway benefits as it might reduce the levels of congestion and backing up around the roundabout.

Most Tesco staff walk or get to work by bus, very few park and limited provision is made for staff parking. The store considers itself as a responsible member of the community and works closely with local police to address youth issues including alcohol sales restrictions.

4.12 Hammerson

It is acknowledged through discussion with stakeholders that the Cyfartha Retail Park, opened in 2006, has had an impact not only on retailing in Merthyr Tydfil town centre, but also on the numbers of cars visiting the town for shopping and therefore potentially on the Council’s parking revenues.

Figure 3. Cyfartha Retail Park

Hammerson owns the Cyfartha Retail Park. An email discussion was undertaken with their national car parking manager. Hammerson reports that currently approximately 150,000 cars a month use Cyfartha and there are no current plans to charge for the car park, in keeping with their national policies.
There are no projections on the potential impact on car usage from the forthcoming developments, including the new Marks and Spencer store. Additionally, Hammerson do not collect any catchment data of users and do not have any plans to, although individual retailers within the Retail Park may have details of the

A request was made as to whether it would be possible to carry out surveys of the users of the retail park, in order to ascertain origins and whether significant numbers use Merthyr Tydfil town centre as well, or might be persuaded to do so. Hammerson was not willing to allow any such surveys at this time.

4.13 Arriva Trains Wales

The railway station, adjacent to Tesco, has 34 car park spaces and 3 Blue Badge spaces. Observations suggest that these spaces are regularly full. Whilst ATW intends that these are used by rail passengers only, there is no means of controlling thus and there is no car park charge. ATW are not considering the implementation of charging. Adding in a £1 charge would increase the cost of a commute by a considerable percentage.

However, through their contractor NCP, they have installed signage at the station since mid-August 2014 and are carrying out enforcement twice weekly. This is for ‘out of bay’, ‘blue badge’ offences etc.

4.14 Marketing and Communications

Discussion during consultation suggested that there was a potential to improve communication of parking issues. Specifically, the opportunity presented by the completion of the St Tydfil and River Taff car parks and the end of road disruption in the town, combined with changes to tariffs when these are finalised, might be used as a platform to relaunch parking and spread awareness to potential visitors that it is easy and good value to park in Merthyr Tydfil.

At the same time it would be useful to provide information around the availability of Permits, since some people believe that these are only available to Council employees. It is recommended that communications to relaunch parking are undertaken jointly by the Council and the BID. There are several channels by which residents or visitors to MT can received information.

Newspapers

There is a Valleys Newspaper, which used to be specific to Merthyr, but has now moved to Cardiff and is less MT focused. There is the South Wales Echo, which the BID has influence in obtaining coverage. There is a Council Contact publication, which is 3 times a year.

Social Media

FB/Twitter is through the www.welovemerthyr.co.uk/ site, which is popular and well thought of. It is funded by the BID.

Radio

Heart FM – local promotion may be available.

It is proposed that these channels are all used in a co-ordinated ‘relaunch’ of parking in Merthyr Tydfil, to be synchronised as far as possible with tariff changes.
5 Council off-street car parks, revenue and tariffs

5.1 Overall capacity

The Miller report detailed the supply of Council off-street as being 1,116 spaces, including 81 disabled spaces. The current overall capacity of the Council off-street car parks as calculated in this report is shown below as 1,122. Of this total, 57 are available to the general public on Saturday only (shaded in grey). This takes into account the latest layout drawings for the River Taff and St Tydfil car parks. The reason for the change in overall capacity is the difference between the additional spaces provided at the Castle MSCP, minus the reduction in capacity at the River Taff and St Tydfil car parks compared with the former College car parks on the same site.

<table>
<thead>
<tr>
<th>Car Park</th>
<th>Standard</th>
<th>Blue Badge</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Castle Multi-Storey Car Park</td>
<td>251</td>
<td>15</td>
<td>266</td>
</tr>
<tr>
<td>Castle Street Car Park</td>
<td>134</td>
<td>8</td>
<td>142</td>
</tr>
<tr>
<td>Castle Street (S)</td>
<td>14</td>
<td>0</td>
<td>14</td>
</tr>
<tr>
<td>St Tydfil</td>
<td>282</td>
<td>17</td>
<td>299</td>
</tr>
<tr>
<td>River Taff</td>
<td>162</td>
<td>7</td>
<td>169</td>
</tr>
<tr>
<td>Gilar Street Car Park</td>
<td>76</td>
<td>10</td>
<td>86</td>
</tr>
<tr>
<td>Tramroad</td>
<td>24</td>
<td>3</td>
<td>27</td>
</tr>
<tr>
<td>Pontmorlais</td>
<td>23</td>
<td>3</td>
<td>26</td>
</tr>
<tr>
<td>Swan Street</td>
<td>0</td>
<td>23</td>
<td>23</td>
</tr>
<tr>
<td>Abermorlais</td>
<td>44</td>
<td>0</td>
<td>44</td>
</tr>
<tr>
<td>High Street</td>
<td>25</td>
<td>1</td>
<td>26</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,035</strong></td>
<td><strong>87</strong></td>
<td><strong>1122</strong></td>
</tr>
</tbody>
</table>

Table 6. Council off-street parking supply

There is no evidence from observation of current parking patterns that this capacity is insufficient to meet the needs of the town. However, if the recommendations of this report are implemented with restrictions to parking in uncontrolled streets and Merthyr Leisure Village, it is likely that supply will come under pressure, requiring future consideration of expansion.

5.2 Historic and Future Revenue

In the broadest terms, parking revenue is a multiplication of price by volume. However, there is a more complex picture of short and long stay parking and daily tariffs against season ticket products, overlaid by levels of compliance, which all interact dynamically to produce actual revenues.

Data provided by the Council shows a decline in overall parking revenues in recent years and also shows a decline in the number of transactions. In addition to the impact of price changes there are a range of likely exogenous causes for this, some of which have been acknowledged by the Council, including:
- Loss of parking supply during construction projects for the Castle Street MSCP and subsequently the St Tydfil and River Taff car parks;
- Disruption caused by roadworks, both within the town due to the River Taff Central Link scheme and also the wider disruption to the trunk road network;
- Relocation of significant numbers of Council employees from the town centre to Pentrebach;
- Loss of key attractors, including various retail outlets and the Hollies Health Centre.

If these four factors are acknowledged as the causes of parking revenue loss, a key consideration for the Council is the extent to which the completion of the construction projects will result in revenue increase in the short term and the extent to which the continuing regeneration of the town will result in higher visitor numbers in the medium to longer term. This section proposes some possible outcomes and also summarises each off street car park. A change in tariff structure is also discussed, with options for the introduction of cheaper short stay tariffs. It is worth observing that the absolute impact of the change in tariffs from 70p to £1.50 as the minimum short stay tariff is difficult to evaluate, due to the number of wider variables described above, but this level of increase is clearly disproportionate and will have had an impact on short stay volumes as is described below.

Note: the revenue analysis below does not include revenue generated from enforcement activity and only includes revenue from the sale of parking products. Detailed revenue breakdowns by transaction and car park was provided up to March 2014, with some data provided to June 2014 and headline revenues for April to October 2014. References to years (e.g. 2010/11) are April to March financial years.

The chart above shows that the decline in overall (total product) parking revenues started in 2010/11. The data suggests that there has been a switch from upfront purchase of
Annual season tickets, to the Council’s direct debit scheme, a small decline in internal season ticket purchases and a larger decline in pay and display revenues.

The peak pay and display revenue as shown in the chart below was in 2008/9. This shows a 2 year decline of 3.8% and 5/9% in the following two years, which might be attributable to general economic conditions, since this predates any change to the supply of off street parking or road disruption. Specifically, price sensitive users may have switched to season ticket products, particularly given the Council’s direct debit scheme. However, the two years following 2008/9 were stable. It is in 2013/14 that the significant decline occurs. This fits with the thinking that disruption to parking supply is a key driver of pay and display revenue loss.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Change</td>
<td>-3.8%</td>
<td>-5.9%</td>
<td>-0.5%</td>
<td>0.9%</td>
<td>-15.1%</td>
</tr>
</tbody>
</table>

Table 7. Year on year percentage change in pay and display revenue.

The table below compares revenue in the current year 2014/15 for the period April to October against the same period in the previous two years. This shows a continued decline in total parking revenue.

<table>
<thead>
<tr>
<th>Year</th>
<th>April to October Parking Revenue</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012/13</td>
<td>£431,288</td>
<td></td>
</tr>
<tr>
<td>2013/14</td>
<td>£397,544 -8%</td>
<td></td>
</tr>
<tr>
<td>2014/15</td>
<td>£310,231 -22%</td>
<td></td>
</tr>
</tbody>
</table>

Table 8. 3 year comparison Apr – Oct (total parking revenue)
Figure 6. 3 year April to October total parking revenues

Whilst total parking revenues for the period April to October show a year on year decline, there is a particularly marked decrease between 2013/14 and 2014/15. Whilst the Castle MSCP had opened in June 2013, the former College car parks had significantly reduced capacity over this period, which may provide a partial explanation. The change tariff structure may also be playing a part as is explored below.

Figure 7. 3 year pay and display revenue Apr to Oct

Pay and display revenue over the same comparison period shows a similar decline. The transaction chart below shows the decline more clearly. There is a close tracking of transaction volumes in 2011 and 2012, with the start of the decline in November 2012 and gradually continuing throughout 2013, then accelerating in 2014.
5.2.1 Impact of tariff change

In April 2014, the Council altered its tariff structure as below:

<table>
<thead>
<tr>
<th>Tariff</th>
<th>1hr</th>
<th>2 hrs</th>
<th>3hrs</th>
<th>4hrs</th>
<th>Day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Old</td>
<td>£0.70</td>
<td>£1.30</td>
<td>£1.60</td>
<td>£2.30</td>
<td>£3.80</td>
</tr>
<tr>
<td>New</td>
<td>£1.50</td>
<td>£1.50</td>
<td>£1.50</td>
<td>£3.50</td>
<td>£3.50</td>
</tr>
<tr>
<td>Percentage increase (-reduction)</td>
<td>114%</td>
<td>15%</td>
<td>-6%</td>
<td>52%</td>
<td>-8%</td>
</tr>
</tbody>
</table>

Table 9. Old and new tariffs

As noted previously, it is somewhat difficult to isolate the impact on revenues of the change of tariffs, due to the other factors impacting on parking usage. However, analysis of revenue and transaction data can provide an indication of the changes in volumes and revenues over a comparable period. Data has been provided by the Council up to June 2014, therefore a period of 3 months following the tariff change has been compared to the same period the previous year. The first table shows the period April 2013 to June 2013, the equivalent period under the old tariffs.

<table>
<thead>
<tr>
<th>Apr - Jun 2013</th>
<th>Total Transactions</th>
<th>Implied Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>1hr</td>
<td>2 hrs</td>
<td>3hrs</td>
</tr>
<tr>
<td>Total</td>
<td>24240</td>
<td>20707</td>
</tr>
<tr>
<td>Tariff Band</td>
<td>£0.70</td>
<td>£1.30</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 10. April to June 2013 transactions and revenue
The quarterly income of £139,539 implies annual revenues of around £413k from pay and display transactions. We can see that the 1 hour category has the single highest usage of any tariff band, with 24,240 transactions (an average of 311 per day, given a 6 day charging week) followed by the 2 hour band with 20,707 (an average of 265 per day).

These users would have encountered a 114% and 15% increase in tariff respectively from April 2014. As noted in the discussion on elasticity in Section 2.4 of this report, a significant loss of volume is to be expected from this change. The table below shows the actual parking volumes with the new tariffs in April to June 2014.

<table>
<thead>
<tr>
<th>Apr - Jun 2014</th>
<th>New 3hrs</th>
<th>New day</th>
<th>Total Transactions</th>
<th>Implied Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>42387</td>
<td>11297</td>
<td>53684</td>
<td>£103,120</td>
</tr>
<tr>
<td>Tariff Band</td>
<td>£1.50</td>
<td>£3.50</td>
<td>Actual revenue</td>
<td>£99,246</td>
</tr>
</tbody>
</table>

Table 11. April to June 2014 transactions and revenue

Note: the figure of £103,120 is derived from the transaction volumes by duration provided in the Council’s data. However, the actual reported revenues for this period are £99,246. The difference is likely to be due to the time periods not being reported exactly alike.

<table>
<thead>
<tr>
<th>Volumes and revenue after tariff change</th>
<th>Change in volume</th>
<th>Change in Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>-32.43%</td>
<td>-23%</td>
</tr>
</tbody>
</table>

Table 12. Change in volumes and revenues post tariff changes

The changes in tariffs have resulted in an increased average tariff from £1.69 to £1.92, which is to be expected from an overall tariff increase, this is the reason that the loss of revenue is less than the 32.4% decline in volume. However, daily parking revenue has declined by 23%. This is consistent with the 3 year revenue comparison chart earlier in this section which shows a 22% decrease in 2014 parking revenues.

<table>
<thead>
<tr>
<th>Average Transaction Values</th>
<th>Apr - Jun 2013</th>
<th>Apr - Jun 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>ATV</td>
<td>£1.69</td>
<td>£1.92</td>
</tr>
</tbody>
</table>

Table 13. Average transaction values before and after

Calculating elasticity

To calculate elasticity, we need to use the formula:
Price Elasticity of Demand = \( \frac{\text{Percentage change in demand}}{\text{Percentage change in price}} \)

For the changes in demand experienced over the comparable periods we cannot calculate the elasticity for each individual tariff band, since we do not have demand data post tariff change. This is because the 1 and 2 hour lower priced tariffs were no longer available. Therefore we need to calculate a blended elasticity. The 32% loss of volume and the overall price increases are shown in the table below and result in a calculated elasticity of -0.81 (for every percentage increase in price there is a 0.81% fall in demand). However, this blended figure will include a wider elasticity range, where short stay parking is much more elastic (being discretionary and also where the absolute values are more significant than the percentage change in price). Long stay parking is likely to be linked to employment and comparatively inelastic. The range that has been applied in this revenue modelling exercise is:

<table>
<thead>
<tr>
<th></th>
<th>1hr</th>
<th>2 hrs</th>
<th>3hrs</th>
<th>4hrs</th>
<th>Day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loss (-gain)</td>
<td>287</td>
<td>33</td>
<td>-9</td>
<td>31</td>
<td>-12</td>
</tr>
<tr>
<td>New volume</td>
<td>24</td>
<td>232</td>
<td>197</td>
<td>43</td>
<td>193</td>
</tr>
</tbody>
</table>

Table 14. Elasticity range by duration

It is recommended that better data collection and analysis is undertaken to refine these elasticities.

<table>
<thead>
<tr>
<th>Tariff Band</th>
<th>1hr</th>
<th>2 hrs</th>
<th>3hrs</th>
<th>4hrs</th>
<th>Day</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Old volume</td>
<td>311</td>
<td>265</td>
<td>187</td>
<td>74</td>
<td>181</td>
<td>1019</td>
</tr>
<tr>
<td>Loss (-gain)</td>
<td>287</td>
<td>33</td>
<td>-9</td>
<td>31</td>
<td>-12</td>
<td>330</td>
</tr>
<tr>
<td>New volume</td>
<td>24</td>
<td>232</td>
<td>197</td>
<td>43</td>
<td>193</td>
<td>688</td>
</tr>
</tbody>
</table>

Table 15. Table of reduced demand

In addition to lost parking revenue, the loss of parking demand implies that approximately 25,000 fewer people parked in Council car parks, over the three month period when compared with the previous year. There may have been a consequent overall detrimental effect on the town. It is of course likely that in reality many of these people parked in Tesco and therefore the town would have suffered a lesser impact in terms of footfall, but data is not available to quantify these proportions.

Given this analysis, it is difficult to support the current tariff structure. However, as noted several times previously, there are more forces at work than price, particularly the disruption to supply and the perception of travel difficulty caused by roadworks, but also the change in retail provision and the significant reduction in MTCBC Council staff relocated from the town centre to Pentrebach.

This also causes some difficulty in recommending future tariffs, since elasticity does not always work in exactly the same way when previously increased prices are subsequently decreased. When a user is confronted by a price increase they are immediately aware and react according to their personal sensitivity to price. However, a decrease in price is not encountered by users who have stopped parking due to previous price increases, therefore there is an awareness time-lag. Additionally, people who have made other arrangements, such as parking in Tesco or MTLV for free, or not visiting the town centre
at all, will not be as responsive to a tariff decrease as they may have been to the previous increase.

Inevitably therefore, even if tariffs reverted to the previous structure, some of the lost parking volume will not return and some will take time to do so. In order to provide some forecast outcomes for new tariff structures, the 0.81 elasticity has been re-applied, but some time delay in realising these enhanced volumes would be expected to allow for the above factors.

5.2.2 Future Tariffs

Noting the above analysis and taking into account the feedback from stakeholders, town centre businesses and residents, it is strongly recommended that a short stay tariff is reintroduced. There are a range of possibilities for doing this, broadly categorised as:

- Reintroduce the previous structure of 1, 2, 3, 4 and all day parking;
- Just introduce a 1 hour tariff to meet the needs of short stay visitors; or
- Introduce a completely new structure, such as charging for every 20 minutes.

In order to model the possible revenue outcomes of a new tariff structure, the current number of transactions has been used as a base against which to apply new tariffs.

<table>
<thead>
<tr>
<th>Tariff option</th>
<th>1hr</th>
<th>2 hrs</th>
<th>3hrs</th>
<th>4hrs</th>
<th>Day</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>£0.50</td>
<td>£1.00</td>
<td>£1.50</td>
<td>£2.30</td>
<td>£3.80</td>
</tr>
<tr>
<td>B</td>
<td>£0.80</td>
<td>£1.20</td>
<td>£1.50</td>
<td>£2.50</td>
<td>£3.50</td>
</tr>
<tr>
<td>C</td>
<td>£1.00</td>
<td>£1.00</td>
<td>£1.50</td>
<td>£3.50</td>
<td>£3.50</td>
</tr>
</tbody>
</table>

Table 16. Possible tariffs

The first table shows examples of tariff structures that might be put in place. The first scenario A introduces a 50p tariff for 1 hour, reflecting strong feedback from retailers and the BID that a £1.00 tariff will not be sufficient to encourage people to return to paying for short stay parking and stop parking in Tesco. It then steps up incrementally as is often encountered in short stay town centre tariff structures. Scenario B is similar but starting at 80p, a level that the Council had previously been considering. Scenario C starts at £1.00.

<table>
<thead>
<tr>
<th>Tariff option</th>
<th>1hr</th>
<th>2 hrs</th>
<th>3hrs</th>
<th>4hrs</th>
<th>Day</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>-67%</td>
<td>-33%</td>
<td>0%</td>
<td>-34%</td>
<td>9%</td>
</tr>
<tr>
<td>B</td>
<td>-47%</td>
<td>-20%</td>
<td>0%</td>
<td>-29%</td>
<td>0%</td>
</tr>
<tr>
<td>C</td>
<td>-33%</td>
<td>-33%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Table 17. Percentage change by duration

The second table, above, shows the impact of each tariff scenario in percentage terms against the current tariffs. Applying our elasticities below, we can see the estimated increase in the number of transactions in each time category. Whilst data shows that up to
311 vehicles used to be parked at the old 70p rate, even a 50p rate will only attract around 145 vehicles per day, with an estimated 107 vehicles at a £1.00 short stay tariff.

<table>
<thead>
<tr>
<th>Duration</th>
<th>1hr</th>
<th>2hrs</th>
<th>3hrs</th>
<th>4hrs</th>
<th>Day</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base transactions</td>
<td>69</td>
<td>232</td>
<td>197</td>
<td>43</td>
<td>145</td>
<td>686</td>
</tr>
<tr>
<td>A</td>
<td>145</td>
<td>325</td>
<td>197</td>
<td>47</td>
<td>144</td>
<td>857</td>
</tr>
<tr>
<td>B</td>
<td>122</td>
<td>288</td>
<td>197</td>
<td>46</td>
<td>145</td>
<td>798</td>
</tr>
<tr>
<td>C</td>
<td>107</td>
<td>325</td>
<td>197</td>
<td>43</td>
<td>145</td>
<td>816</td>
</tr>
</tbody>
</table>

Table 18. Estimated future daily transactions by duration

Against a current revenue base of £103,120 (or £99,246 as reported in the Council data) any of the tariff changes will result in a revenue increase, albeit relatively modest, being in the region of 2% - 5%, but each scenario also delivers a higher percentage volume increase in vehicles parked. Scenario A results in the highest overall volumes per day with an increase from 686 to 857 (25%). Scenario B and C deliver 16% and 19% volume increases respectively.

<table>
<thead>
<tr>
<th>Revenue</th>
<th>1hr</th>
<th>2hrs</th>
<th>3hrs</th>
<th>4hrs</th>
<th>Day</th>
<th>Total</th>
<th>Annual Equivalent</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>£5,637</td>
<td>£25,383</td>
<td>£23,007</td>
<td>£8,468</td>
<td>£42,561</td>
<td>£105,055</td>
<td>£420,220</td>
</tr>
<tr>
<td>B</td>
<td>£7,602</td>
<td>£26,978</td>
<td>£23,007</td>
<td>£9,061</td>
<td>£39,540</td>
<td>£106,188</td>
<td>£424,750</td>
</tr>
<tr>
<td>C</td>
<td>£8,321</td>
<td>£25,383</td>
<td>£23,007</td>
<td>£11,684</td>
<td>£39,540</td>
<td>£107,934</td>
<td>£431,738</td>
</tr>
</tbody>
</table>

Table 19. Forecast revenue from tariff changes

Each of the above scenarios is a credible response to the loss of volume experienced by the Council in its off-street car parks. It is clear that those most concerned with footfall and regeneration would favour Scenario A, whilst budget holders might take a more risk averse position and favour B or C. Each of these scenarios will present a tariff structure that is more likely to support future growth in short stay parking than the current structure.

**Charging for of an part hour**

Many short stay town centre car parks charge for part of an hour, for example by 15 or 20 minute time bands. However, most of these also apply such charges to the on-street short stay capacity, thus removing the market distortions generated by free on-street short stay. At this point in the ongoing evolution of Merthyr Tydfil’s parking pricing it is not suggested that this type of approach is implemented, particularly since the Ty Gwyn car park will provide free 1 hour short stay. However, this approach remains a valid potential change in future years and should be reviewed as an option after implementation of the recommendations of this report have been in place for a year or more.

**5.2.3 Saturday revenue and tariffs**

The table and chart below shows the Saturday revenue for 2013/14. The split by car park shows that Swan Street and Gilar Street generate the most revenue per space on Saturdays, whilst historically College South, now the new River Taff car park has been the least used. This may change now that the road layout is complete and the attractive new parking facilities are available and visible to town centre employees and visitors.
<table>
<thead>
<tr>
<th>Car Park</th>
<th>Historic Revenue</th>
<th>Per Saturday</th>
<th>Per space</th>
</tr>
</thead>
<tbody>
<tr>
<td>Swan</td>
<td>£4,717.20</td>
<td>£90.72</td>
<td>£3.94</td>
</tr>
<tr>
<td>Gilar Street</td>
<td>£14,751.25</td>
<td>£283.68</td>
<td>£3.30</td>
</tr>
<tr>
<td>Tramroad</td>
<td>£4,151.65</td>
<td>£79.84</td>
<td>£2.96</td>
</tr>
<tr>
<td>College</td>
<td>£34,195.35</td>
<td>£657.60</td>
<td>£2.20</td>
</tr>
<tr>
<td>Castle</td>
<td>£12,771.80</td>
<td>£245.61</td>
<td>£1.73</td>
</tr>
<tr>
<td>Pontmorlais</td>
<td>£2,276.10</td>
<td>£43.77</td>
<td>£1.68</td>
</tr>
<tr>
<td>MSCP</td>
<td>£4,307.45</td>
<td>£82.84</td>
<td>£0.31</td>
</tr>
<tr>
<td>College S</td>
<td>£1,756.65</td>
<td>£33.78</td>
<td>£0.20</td>
</tr>
</tbody>
</table>

Table 20. Saturday revenue per space 2013/14

![2013/14 Saturday Revenue and Transactions](image)

Figure 9. Saturday transactions and revenue 2013/14

The above chart shows how revenue and transactions were split in 2013/14, with a reasonable spread between short term and longer term parking, where more transactions were made by short term parkers but significant revenues were still gained through longer stay parking. A total of £80,535 was generated in grow parking revenue (£67,112 net of VAT) through 55,000 transactions. If the Saturdays leading up to Christmas 2013 had also been chargeable, transaction volumes would have been totalled 60,000.
Future Saturday Tariffs

The Council and the Business Improvement District have been in discussion to determine the appropriate town centre charging strategy on Saturdays. In keeping with previous years, the Saturdays immediately preceding Christmas will be free to town centre visitors. However, for 2015, it has not been possible to assemble a funding package to extend this free parking for Saturdays. Therefore, a tariff of £1.00 all day for Saturdays has been proposed. This seeks to provide a simple attractive all day tariff which can be targeted at visitors through marketing and communications activity. If agreed, the Council and the BID are confident that this will generate a broadly equivalent amount of revenue on Saturdays, however the BID is providing funding support to limit the risk to the Council of lost revenue.

If the new tariff is marketed effectively an uplift would be expected in transactions which would offset the loss of revenue from mid-long stay parking fees. If we apply the elasticity measure that we introduced earlier in this section, an estimated transaction volume of around 78,581 would result as shown below.

<table>
<thead>
<tr>
<th>Old volume</th>
<th>18,171</th>
<th>20,122</th>
<th>14,165</th>
<th>3,472</th>
<th>4,069</th>
<th>60,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Old tariff</td>
<td>£1.50</td>
<td>£1.50</td>
<td>£1.50</td>
<td>£3.50</td>
<td>£3.50</td>
<td></td>
</tr>
<tr>
<td>New Tariff</td>
<td>£1.00</td>
<td>£1.00</td>
<td>£1.00</td>
<td>£1.00</td>
<td>£1.00</td>
<td></td>
</tr>
<tr>
<td>Change</td>
<td>-33%</td>
<td>-33%</td>
<td>-33%</td>
<td>-71%</td>
<td>-71%</td>
<td></td>
</tr>
<tr>
<td>Elasticity</td>
<td>-1.65</td>
<td>-1.2</td>
<td>-0.8</td>
<td>-0.3</td>
<td>-0.1</td>
<td></td>
</tr>
<tr>
<td>New Volumes</td>
<td>26,871</td>
<td>26,738</td>
<td>16,933</td>
<td>3,969</td>
<td>4,070</td>
<td>78,581</td>
</tr>
<tr>
<td>Revenue</td>
<td>£26,871</td>
<td>£26,738</td>
<td>£16,933</td>
<td>£3,969</td>
<td>£4,070</td>
<td>£78,581</td>
</tr>
</tbody>
</table>

Table 21. Potential impact of £1.00 Saturday tariff
5.3 Season Tickets and Permits

Generally, in the parking industry, products offered to the general public for a longer duration than one day are termed Season Tickets, whilst authority to park issued on the basis of employment or residence are termed Permits. For Merthyr Tydfil the terminology between the two is mixed, so publicly available products are variously termed Permits and Season Tickets.

![Phone and Pay App](image)

Phone and Pay App

Phone and Pay has a free smartphone mobile app for Android and iPhone.

Visit your App Store and search for the app under “phone and pay parking” to download for free.

Parking Permit Application

A season ticket can also be purchased costing £38 for one month and £350 for an annual ticket which can also now be paid by 12 monthly instalments.

The season tickets can be used in any car park within the Borough.

To download a permit application form please refer to our documents link to the right of this page. To make an online payment please refer to the Pay For It section of our website.

An application and payment can also be made by telephone by contacting us on the number below.

Figure 11. Excerpt from Council website season ticket purchase section

It is recommended that this is changed so that it is clear that there is a Season Ticket product that is available to all, as part of advertising these products more widely. Several consultees indicated that they believed there was a lack of awareness of these discounted products. Some survey respondents also reported this. Specifically:

“My staff and I use the college car park during working hours. I am disappointed that you do not cater for staff in the town. Full time staff are forced to pay £84 per month to park just for coming to work (£3.50 a day) it’s a shame you don’t have parking passes free or even discounted parking fees for those who rely on using the car parks as many others do.”

Additionally, it is recommended that weekly and quarterly products are introduced. The weekly should be based on 4 times the daily rate and therefore priced at £14.00 based on the current daily rate and only be available by phone or online.

The table below shows the fluctuations in season ticket sales in recent years. The decline in sales is part of an overall decline in parking revenues and reflects all the factors previously mentioned. Whilst this report recommends that the Council progressively reduces the current discount levels, this should only be done once control of local streets and the Leisure Village has been implemented and should a realignment be over a period of years, not a quick revenue generation measure as this would be counter-productive.
### Season Ticket sales

<table>
<thead>
<tr>
<th>Year</th>
<th>Sales</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010/11</td>
<td>£185,821</td>
<td>5%</td>
</tr>
<tr>
<td>2011/12</td>
<td>£165,866</td>
<td>-11%</td>
</tr>
<tr>
<td>2012/13</td>
<td>£175,369</td>
<td>6%</td>
</tr>
<tr>
<td>2013/14</td>
<td>£154,151</td>
<td>-12%</td>
</tr>
<tr>
<td>2014/15</td>
<td>£138,077</td>
<td>-10%</td>
</tr>
</tbody>
</table>

Table 22. Season ticket sales

#### 5.3.1 Discount Rates

As always with parking pricing, demand should be the key driver. It is worth evaluating the discount rate offered for season tickets, which are currently at £38 for one month and £350 for a year. If we assume that those purchasing monthly or annual season tickets park for 5 days a week, this results in an average of 21 parking days per month and 232 days per year (assuming 4 weeks holiday and 8 bank holidays). The discount rates are currently very generous when compared to the daily rate of £3.50 and, when compared to discounted rates elsewhere.

<table>
<thead>
<tr>
<th>Product</th>
<th>Typical discounted rates</th>
<th>Actual Discounted rates</th>
<th>% discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily</td>
<td>£3.50</td>
<td>£38.00</td>
<td>48%</td>
</tr>
<tr>
<td>Weekly</td>
<td>£14.00</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Monthly</td>
<td>£54.00</td>
<td>£38.00</td>
<td></td>
</tr>
<tr>
<td>Annual</td>
<td>£560.00</td>
<td>£350.00</td>
<td>57%</td>
</tr>
</tbody>
</table>

Table 23. Typical and actual season ticket discount rates

Whilst this study is based on the premise that Merthyr Tydfil should be considered primarily on its own local circumstances, it is worth looking at other approaches to season tickets. The example shown below from Caerphilly shows a lower level of discount.

<table>
<thead>
<tr>
<th>Product</th>
<th>Tariff</th>
<th>Cost at full price</th>
<th>Discount rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly</td>
<td>£9.00</td>
<td>£10.00</td>
<td>10%</td>
</tr>
<tr>
<td>Quarterly</td>
<td>£95.00</td>
<td>£116.00</td>
<td>18%</td>
</tr>
<tr>
<td>Annual</td>
<td>£300.00</td>
<td>£464.00</td>
<td>35%</td>
</tr>
</tbody>
</table>

Table 24. Caerphilly season ticket rates

Due to the current price sensitivity revealed by the consultation and survey processes, it is not recommended that the daily tariff of £3.50 is increased in the next few years and certainly not beyond the rate of inflation. However, a realignment should progressively be applied to gradually reduce the discount for the Season Ticket products, in addition to introducing a weekly product. If this happens in conjunction with the control of residents areas as is recommended elsewhere in this report, this will rebalance the income from the Council’s off-street estate. A suggested trajectory might be as in the table below where a 2.5% increase is applied each year to the daily tariff (representing RPI) and a 6% increase is applied to season ticket products.
Table 25. Possible future realignment of discounts

This would then result in the discounting of products after 5 years as follows:

<table>
<thead>
<tr>
<th>Tariff</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily</td>
<td>£3.60</td>
<td>£3.70</td>
<td>£3.80</td>
<td>£3.90</td>
<td>£4.00</td>
</tr>
<tr>
<td>Weekly</td>
<td>£14.40</td>
<td>£14.80</td>
<td>£15.20</td>
<td>£15.60</td>
<td>£16.00</td>
</tr>
<tr>
<td>Monthly</td>
<td>£40.30</td>
<td>£42.70</td>
<td>£45.30</td>
<td>£48.00</td>
<td>£50.90</td>
</tr>
<tr>
<td>Quarterly</td>
<td>£151.20</td>
<td>£160.30</td>
<td>£169.90</td>
<td>£180.10</td>
<td>£190.90</td>
</tr>
<tr>
<td>Annual</td>
<td>£371.00</td>
<td>£393.30</td>
<td>£416.90</td>
<td>£441.90</td>
<td>£468.40</td>
</tr>
</tbody>
</table>

Table 26. Realigned discounted rates after 5 years

### Season ticket retailing

Currently, the Council requires season tickets to be purchased through downloading and printing a form from the website, which consists of unnecessary administration. All season ticket products should be available online, either through the Phone and Pay system, or by using the Permit Gateway function within the ICES Parking Gateway software used by the Council. As shown in the web excerpt below, the Council does have the facility for online payment for parking season tickets (as well as PCNs) so it is only a short step to full online purchase.

![Payment Services](image)

Figure 12. Council online payment screen
Direct debits

The Council offers a direct debit option for those wishing to purchase an annual season ticket, as shown on the Council’s website:

“The cost of an annual car park season ticket is £350. By applying to pay by direct debit you will be able to pay this fee in twelve separate instalments of £29.17 over the year”

This is good practice and should be retained. It is understood that a signed direct debit mandate is required, so some administration will still be necessary, however a physical season ticket product should not be issued. Receipts should be obtainable online.

5.4 Discussion of individual car parks

5.4.1 General observations

Data provided by the Council shows that Castle Street and St Tydfil have a high proportion of long stay to short stay, whilst the other car parks have a mix of short stay parking. The occupancy estimates below take the total capacity (Castle Street surface and MSCP are combined) and the number of transactions over a 6 month period, with a 6 day charging week. This shows that Swan Street has the greatest amount of ‘turn’ per space, closely followed by Gilar Street and Pontmorlais.

<table>
<thead>
<tr>
<th>Car Park</th>
<th>Total</th>
<th>Transactions</th>
<th>Per space</th>
<th>Implied occupancy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Castle St (inc. MSCP)</td>
<td>408</td>
<td>37897</td>
<td>93</td>
<td>60%</td>
</tr>
<tr>
<td>St Tydfil</td>
<td>468</td>
<td>31614</td>
<td>68</td>
<td>43%</td>
</tr>
<tr>
<td>Gilar Street Car Park</td>
<td>86</td>
<td>23288</td>
<td>271</td>
<td>174%</td>
</tr>
<tr>
<td>Tramroad</td>
<td>27</td>
<td>4797</td>
<td>178</td>
<td>114%</td>
</tr>
<tr>
<td>Pontmorlais</td>
<td>26</td>
<td>6560</td>
<td>252</td>
<td>162%</td>
</tr>
<tr>
<td>Swan Street</td>
<td>23</td>
<td>6927</td>
<td>301</td>
<td>193%</td>
</tr>
</tbody>
</table>

Table 27: Capacity and occupancy

However, due to overall capacity and average transaction value, the major contributors to Council revenue are St Tydfil and Castle Street.
5.4.2 Castle Street

As noted in the Miller report, Castle street has been historically used by long stay parkers, primarily believed to be employees. The chart below shows that the majority of parking transactions for the data available were purchased by 10.00, with volumes then declining, supporting the thinking that this car park is connected with employment.
However, the car park is very well located for the High Street, Red House, Theatr Soar and Penderyn Square, as well as the Civic Centre and the Law Court. Since construction of the MSCP, it has been difficult to access the car park when coming into the town, particularly for those not aware. In response, the car park should be marketed as a town centre visitors and shoppers car park as well as serving employment.

![Castle Street MSCP](image)

Figure 15. Castle Street MSCP

One measure that should be considered to support this is the reserving of at least some ground floor capacity for shoppers, visitors and others arriving later than 10.00. It would be difficult to operationally manage this on the surface area, but the ground floor of the MSCP could be reserved until 10.00. Currently the roof of the MSCP is less used than the internal floors, so this could be achieved with no impact on the ability of employees to park. Signage alone should be sufficient to achieve this change, with some initial communications to season ticket holders and the presence of a CEO in the early days of the change.

### 5.4.3 Castle Street South

There is also a ‘caged’ area, in effect a separate compound with palisade fencing, which is being used as a car park for visitors to the Civic Centre and then as a public car park at weekends, like Abermorlais. This is not unreasonable and should continue. However, the system of issuing visitor permits is administratively cumbersome and should be changed to use the Phone and Pay system. Council departments should be given unique codes for their staff to use that will identify their right to park in this area (and Abermorlais) during weekdays. The CEOs can then more easily enforce compliance at these car parks.
5.4.4 Tramroad

Feedback and observations appear to suggest that the Tramroad car park is used by employees. This is supported by the chart below.

The car park is well located for the town centre and has been observed with vehicles parking out of bay and also using the car park as a waiting area. A reasonable degree of discretion is being used by the CEOs. There are no particular recommendations in the short term for this car park. However, it is in close proximity to the Controlled Parking Zones and could potentially be used as an overflow for Resident or Visitor Permit holders, if pressure on controlled streets continues to increase.

5.4.5 Gilar Street

Gilar Street is a popular car park, well located for the High Street and town centre generally. Capacity has recently been reduced due to space being taken by construction compounds. As the chart shows, the car park has a spread of long and short stay use, but is mostly a short stay car park and is used throughout the day.
There has also been some traditional use of this car park by market traders. Whilst the car park is also valuable to generate revenue for the Council and to provide parking for visitors and shoppers, it makes sense for traders to use this car park rather than the River Taff car park and this should be charged on the basis of Business or Traders permits.

### 5.4.6 Pontmorlais

This car park is also well located for Pontmorlais and the High Street / Penderyn Square area. It may not be used by occasional visitors to the town as it is not immediately obvious. Since this is a small car park and visitors approaching from the A465 direction should be directed towards Castle Street this is not a problem.
The car park could do with some environmental improvements, including relining, as it looks a little shabby compared to Castle Street and St Tydfil / River Taff. There are no other recommendations currently.

Figure 21. Pontmorlais car park

5.4.7 St Tydfil

This car park is already well used since its reopening. The data below relates to the time when it was known as the College (Main) car park. It is important that this name is not used going forward and the St Tydfil name is communicated, in order to break any perception that this car park is there to serve the College.
Figure 22. St Tydfil transactions and durations (when it was College)

The importance of the car park as a short and long stay facility is evident from the chart above. However, if the Council adopts the recommendation to reduce the season ticket cost at Taff River, as contained elsewhere in this report, the balance will shift to a degree to short stay parking. This is a desirable outcome as the car park is the most convenient for arrivals from the A470.

Figure 23. St Tydfil car park

5.4.8 River Taff

During most of this survey, the River Taff car park was under construction. In previous times, this car park has been known as College (South) or the overflow car park and was historically not well used. With the reconstruction that will change. The potential impacts on this car park are the control of the MTLV possibly displacing WAG employees into this car park and the control of Ynysfach streets, leading to Merthyr College staff and students
potentially purchasing permits for this car park. These issues, including the potential to provide a discounted Season Ticket for this car park are dealt with in other sections of this report.

Figure 24. River Taff car park

[replace photo with completed car park]

**5.4.9 Abermorlais**

This car park is used by authorised Council officers and visitors during the week and is pay and display at weekends. No data has been provided as to its use. Whilst it is a little further from the town centre than other car parks, it could still provide some valuable additional capacity in the longer term if parking supply comes under pressure.

It is therefore suggested that the situation is reviewed to ensure that the capacity is actually needed for Council visitors and officers. There is also capacity in the Civic Centre underground car park which appears to not always be used. It is understood that this is reserved for particular employees and members, so a careful reappraisal over time should be undertaken to ensure that capacity on both car parks is used in an optimal way.

Figure 25. Abermorlais car park
5.4.10 Ty Gwyn

new Ty Gwyn car park, noted as part of a residential development, connected to the town centre regeneration as a whole and specifically the Vibrant and Viable places scheme (MT was awarded £12.873m in Jan 2014 under the scheme). It is intended that this car park will be free for 1 hour with no return within 1 hour. It is important that this short stay restriction is effectively enforced to ensure that the overall strategy of on- and off-street short stay parking is not undermined. In order to make best use of the Council’s CEO resources, this is best achieved by the installation of a Metric terminal that dispenses a 1 hour ticket, with the requirement for VRM entry.

5.4.11 Swan Street

Swan Street is a Blue Badge only car park and appears to be well used both from observations and from data. There is some anecdotal evidence that the car park is
sometimes under-utilised. However the data shows that it is occupied to high levels compared to other town centre car parks.

![Swan Street transaction time and duration](image)

Figure 28. Swan Street transactions and durations

Currently (see Section 9 of this report) the Council provides a sufficient proportion of its off-street and on-street parking for Blue Badge holders, who are additionally permitted to park on single and double yellow lines (unless loading restrictions are in place). It is not at this stage recommended to change the use of Swan Street car park.

### 5.4.12 High Street

This 16 space free car park has a 30 minute restriction with no return within 2 hours. There is no usage data for this car park. It is somewhat removed from the main High Street area and not as well located as Gilar Street, therefore the name is possibly inappropriate and might be a changed (e.g. to Lower High Street?). Usage of this car park should be monitored and consideration given to short stay charges being introduced if high occupancies are observed. No immediate action should be taken.

![High Street car park](image)

Figure 29. High Street car park
6 Residents Parking

6.1 Current situation

6.1.1 Controlled Parking Zones

Only a limited number of streets in Merthyr Tydfil are controlled for the use of residents and visitors only. These are the Zone A and B streets shown in the map below.

Figure 30. Residents Permit Zone A and B map

MTCBC charges £34 per year for a residents permit, which is linked to a vehicle registration mark (VRM). Residents within the Zones are also able to purchase a Visitors permit for the same cost, that is not linked to a VRM and can therefore be used by anyone who has the householders permission. It is anecdotally believed that this system is subject to some abuse, whereby visitors permits are used by friends or relatives of households for parking within the residents permit zones, who are not actually visiting them, but working or visiting the town for other purposes in order to avoid parking charges. The CEOs have carried out some ad hoc activity in the past in order to detect this practice, but it is not systematically undertaken.

Note: as detailed in the options section of this chapter, many Local Authorities charge for each individual visitor parking session in Controlled Parking Zones, which reduces the
potential for abuse. This is sometimes administrated through physical scratch cards and sometimes through online / phone cashless parking platforms or a mixture of both.

The Council reports that it has issued 306 permits, across 209 properties (it is estimated through visual observations that there are approximately 30 properties in the Controlled Parking Zones that do not have any permits. The number of Permits issued at £34 suggests current Annual Permit gross revenues of £10,404 (on-street permits are not VAT rated). The remit for this report does not include investigating the operational costs of managing parking, therefore this report does not comment on whether this activity covers its operating costs. The breakdown of permits issued is:

<table>
<thead>
<tr>
<th>Zone A</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Residents</td>
<td>57</td>
<td></td>
</tr>
<tr>
<td>Visitors</td>
<td>64</td>
<td></td>
</tr>
<tr>
<td>Zone B</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Residents</td>
<td>79</td>
<td></td>
</tr>
<tr>
<td>Visitors</td>
<td>106</td>
<td></td>
</tr>
<tr>
<td>Total Residents</td>
<td>136</td>
<td></td>
</tr>
<tr>
<td>Total Visitors</td>
<td>170</td>
<td></td>
</tr>
</tbody>
</table>

Table 28. Total Residents and Visitors Permits issued

Of those who have Residents permits, the numbers in each Zone who also have visitors permits are as follows.

<table>
<thead>
<tr>
<th>Resident Permit holders with Visitor Permits</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>36</td>
<td>45%</td>
</tr>
<tr>
<td>No</td>
<td>43</td>
<td>54%</td>
</tr>
<tr>
<td>Zone B</td>
<td>79</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>34</td>
<td>59%</td>
</tr>
<tr>
<td>No</td>
<td>23</td>
<td>40%</td>
</tr>
<tr>
<td>Zone A</td>
<td>57</td>
<td></td>
</tr>
<tr>
<td>Total Yes</td>
<td>70</td>
<td>51%</td>
</tr>
<tr>
<td>Total No</td>
<td>66</td>
<td>49%</td>
</tr>
<tr>
<td>Total</td>
<td>136</td>
<td></td>
</tr>
</tbody>
</table>

Table 29. Resident Permit holders with Visitors Permits

Of the 136 Resident Permit holders, 70 have Visitor Permits and 66 do not. The percentage with Visitors Permits is higher in Zone A. Of those households to which the 170 Visitors Permits have been issued, 71 also have residents permits whilst 99 do not. This suggests that those who have Visitors Permits but not Residents Permits either do not have a car, or park their car outside the Controlled Parking Zones.

<table>
<thead>
<tr>
<th>Holders of Visitors Permits also having Residents Permits</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Zone B</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Y</td>
<td>37</td>
<td>35%</td>
</tr>
<tr>
<td>N</td>
<td>69</td>
<td>65%</td>
</tr>
<tr>
<td>Zone A</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-----</td>
<td>-----</td>
<td>-----</td>
</tr>
<tr>
<td>Y</td>
<td>34</td>
<td>53%</td>
</tr>
<tr>
<td>N</td>
<td>30</td>
<td>47%</td>
</tr>
<tr>
<td>Total Yes</td>
<td>71</td>
<td>42%</td>
</tr>
<tr>
<td>Total No</td>
<td>99</td>
<td>58%</td>
</tr>
</tbody>
</table>

Table 30. Visitors Permit holders with Resident Permits

**Conclusion:** there are more Visitor Permits than Resident Permits, if the CEOs have been in receipt of complaints by residents that they cannot park within their Zone, then this may be at least a contributing factor. It would not seem logical that the number of Visitor Permits is higher than the number of Residents permits unless the former are also being used for second residents vehicles.

### 6.1.2 Morgan Town

The area to the north of the town centre known as Morgan town is also controlled by the issue of residents permits, as shown in the picture and figure below.

![Morgan Town streets enforced under Off Street Parking Orders](image1)

Figure 31. Morgan Town streets enforced under Off Street Parking Orders

![Morgan Town controlled parking zone](image2)

Figure 32. Morgan Town controlled parking zone
This is believed to work effectively and there are no reported complaints about residents no being able to park. Therefore, this area has not been included in surveys. However, it should be continually reviewed as parking changes in the town come into effect to ensure that no displacement into this area occurs.

6.1.3 Merthyr Valley Homes

There are also residents parking controls in the Caedraw Estate, an area of flats controlled by Merthyr Valley Homes, shown in the plan below.

Figure 33. Merthyr Valley Homes Caedraw estate and location map

Discussion with CEOs has indicated that the operation of the Caedraw parking area generally works well, although there are some issues around school opening and closing times. Merthyr Valley Homes also report that ‘our perspective is that the Caedraw Scheme although not perfect has alleviated a lot of the parking issues and complaints we previously received in this area.

Ynysfach

Merthyr Valley Homes was aware through complaints from residents of their homes in the Ynysfach area that there was a high level of parking by non-residents. In response, MVH issued a series of letters to their tenants and carried out a consultation exercise where it was explained to people that those without off street parking would be invited to apply for a residents or visitors permit on the same basis as those living in Caedraw properties. This resulted in opposition to the scheme, as shown in the excerpt from a letter to residents:

“.. two consultation exercises were arranged. The first involved a questionnaire being delivered to all residents on 10 February 2014. The second involved 3 drop in consultation sessions held in the Cae`nwer Sheltered Hall on 8th, 9th and 10th April 2014.

A total of 105 responses were received following these consultation exercises. In relation to parking problems on the estate, 37% of residents stated that they had experienced parking problems. However, only 21% of residents were in favour of the introduction of a
permit parking scheme. Therefore, based on these results we will be unable to introduce a permit scheme.

As part of the consultation we asked residents for their ideas on how we could ease the parking situation. The top 3 suggestions were:

- **Provision of double lines on the main access roads of the estate.**
- **Provision of Resident Only Parking Signs** – it was explained to residents, that if we erect such signs we would be unable to enforce any breach without a permit scheme in place. They however felt that signs would still act as a deterrent.
- **Speak to the Principal of the College** as much of the unauthorised parking on the estate is alleged to be from college students and staff.

I can confirm that we have looked at alternative methods of easing the parking difficulties on this estate by taking residents’ suggestions on board. We have recently met with officers from Merthyr Tydfil County Borough Council in relation to the request for double yellow lines to be provided. The officers stated that they would monitor the situation, however, could not consider providing yellow lines until the Town Centre Work has been completed and all car parks reopened and returned to full capacity.

We are in the process of arranging for ‘Resident Only Parking Signs’ to be erected in a number of areas on the estate. As previously advised although we will be unable to enforce, it is hoped that the signs will act as a deterrent.

We recently met with [the] College Principal, to highlight the parking issues in Ynysfach. [The College Principal] was extremely co-operative and has agreed to communicate to both staff and students the difficulties being caused to residents on the estate by unauthorised parking.

I would also like to remind residents that any parking issues such as persons causing an obstruction or blocking driveways should be reported to South Wales Police or Merthyr Council’s Parking Enforcement Officers”.

Signs have since been erected on streets such as the example shown below.

![Figure 34. Non-enforceable ‘Residents Parking Only’ sign Ynysfach](image)
Visual observations of the roads around the rear of the college suggest some non-residents parking, but there did appear to be a reasonable level of on-street capacity available, although unevenly spread, with streets closest to the College steps (see photo below) most heavily occupied. There is no evidence that the Residents Parking Only are providing sufficient effective deterrent to mitigate this problem.

Figure 35. Path adjacent to the College building

Figure 36. Streets at the top of the College path

6.1.4 Resident Surveys

In the light of the evidence gathered through consultation and provision of data by the Council, it was proposed that a door-to-door survey of residents was carried out to establish opinion and experience and attempt to draw conclusions as to the appropriate actions if any that the Council might pursue to improve parking for residents. Over the
weekend of 25/26 October 2014, a total of 115 households within the Controlled Parking Zones A and B and 176 households in uncontrolled streets in the Ynysfach and Georgetown areas were interviewed. The survey forms that were used are attached as Appendix A.

### 6.2 Controlled Streets

The following streets in the Controlled Parking Zones A and B were surveyed.

<table>
<thead>
<tr>
<th>Alma Street</th>
<th>Cross Thomas Street</th>
<th>Somerset Place</th>
</tr>
</thead>
<tbody>
<tr>
<td>Church Street</td>
<td>Lower Thomas Street</td>
<td>Tramroad Terrace</td>
</tr>
<tr>
<td>Cobden Place</td>
<td>Lower Thomas Street</td>
<td>Tramroadside North</td>
</tr>
<tr>
<td>Coedcae’r Cwrt</td>
<td>Milton Place</td>
<td>Union Place</td>
</tr>
<tr>
<td>Court Terrace</td>
<td>Milton Terrace</td>
<td>Union Terrace</td>
</tr>
<tr>
<td>Courtland Terrace</td>
<td>Newcastle Street</td>
<td>Upper Thomas Street</td>
</tr>
<tr>
<td>Courtland Terrace</td>
<td>Newton Terrace</td>
<td>Windsor Terrace</td>
</tr>
<tr>
<td>Courtland Villas</td>
<td>Newton Terrace</td>
<td></td>
</tr>
</tbody>
</table>

Table 31. Controlled streets surveyed

Approximately 40% of calls made resulted in a successful survey, although the degree to which respondents were willing to answer all questions varied. The survey may be considered to be statistically robust due to the relatively high proportion of houses who successfully responded. However, the answers suggest that a disproportionate number of refusals / absentee households were amongst people holding Visitors permits only, as noted in the narrative below.

The questions asked were:

1. How many cars does your household own (residents only not visitors)?
2. Does your household have a Residents Permit?
3. Does your household have a Visitors Permit?
4. How often do you use your Visitors permit?
5. Do you have problems finding a space to park in your residents parking zone?
6. If you do have regular problems parking, what do you think might be done about this?
7. Does your household have access to the internet / a smartphone?
8. Would you pay for individual visitors sessions / what method would you prefer?
9. Where / how frequently do you park in Merthyr Tydfil?
10. Do you work in Merthyr Tydfil?
11. Do you have any comments about parking (either in the your residents permit zone or in the town)?

Table 32. Survey questions – controlled streets
The charts below show the responses with some narrative comment.

**Q1 How many cars does your household have?**

Average number of cars per household was reported to be 1.23. The highest was 3. Distribution of responses was:

<table>
<thead>
<tr>
<th>Number of cars</th>
<th>Households</th>
<th>% surveyed</th>
<th>% in Wales (2011/12)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>3</td>
<td>3%</td>
<td>24%</td>
</tr>
<tr>
<td>1</td>
<td>86</td>
<td>75%</td>
<td>40%</td>
</tr>
<tr>
<td>2</td>
<td>23</td>
<td>20%</td>
<td>36%</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>3%</td>
<td>Not reported</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>115</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 33. Number of cars per household – controlled streets


This level of car ownership is slightly different than that reported for the whole of Wales, with a higher number of single car households and a lower number of households reporting no cars.

**Q2 / 3 Do you have a Residents / Visitors Permit?**

![Figure 37. Visitors Permits](image)

Do you have a Visitors Parking Permit?

- Yes, 76, 66%
- No, 39, 34%
The response to these two questions is somewhat contrary to the data provided by the Council. The chart below summarises the difference between the information given by survey respondents and the reported number of Residents and Visitors Permits as provided by the Council.

The chart shows that more respondents claim to have both types of permits than the Council has issued and conversely that fewer report having Visitor but not Resident Permits than the Council has issued. There are a number of possible reasons for this:

- Some households may not be clear of the difference between Residents and Visitors Permits, or may not be aware of the Permits that their household has;
Residents who have a Visitor Permit but not a Resident Permit may be less likely to answer the door to surveyors, potentially being older members of the community who would have a lower car ownership and rely more on visitors.

Q.4 How often do you use your Visitors Permit?

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Always</td>
<td>49</td>
<td>65%</td>
</tr>
<tr>
<td>Frequently</td>
<td>17</td>
<td>23%</td>
</tr>
<tr>
<td>Sometimes</td>
<td>4</td>
<td>5%</td>
</tr>
<tr>
<td>Rarely</td>
<td>5</td>
<td>7%</td>
</tr>
<tr>
<td>Never</td>
<td>0</td>
<td>0%</td>
</tr>
</tbody>
</table>

![Pie Chart](image)

Figure 40. Frequency of Visitor permit use

The categories given to respondents were:
- Always: everyday
- Frequently: at least weekly
- Sometimes: between weekly and monthly
- Rarely: once a month or less
- Never

Over 80% of permits are used very regularly, at least weekly and for 65% of respondents daily or several times per week. This is high level of use of Visitors permits. If the hypothesis of Visitor Permit only holders being under reported in the survey is correct, than indications are that a high level of on-street capacity is being used on a regular basis by visitors not residents.

Q.5 Do you have problems finding a space to park in your residents parking zone?
A majority of respondents reported problems finding a parking space. The responses were evenly distributed across the streets in both zones, therefore the extent to which problems can be attributed to particular streets is limited. This is unsurprising given the relatively small area covered by both zones. It is more likely that the experience of difficulties in finding a space is related to patterns of use, where residents who already have their car parked close to their premises at times of peak demand experience fewer problems.

**Q.6 If you do have regular problems parking, what do you think might be done about this?**

If parking supply is finite and demand regularly exceeds this, the extent to which parking problems might be mitigated is limited. This open ended question was not expected to gain significant intelligence to drive the Council’s decision making. However, amongst those who did answer, there was a fairly consistent trend towards requesting more capacity (although where this was to be provided was not suggested) and more enforcement, particularly after 6pm and at weekends. The pub and the church were specifically mentioned as sources of unwelcome vehicle parking out of hours. This is consistent with feedback from CEOs that weekend and evening problems are reported to them.
A full list of comments is provided at Appendix B. *(note: the total is greater than 115 as some respondents had multiple comments)*

**Q.6 / 7 Do you have access to the internet / a smartphone? If so, would you be willing to pay for individual visitors permits if this was cheaper?**

As is noted elsewhere in this report, prevailing trends within parking, both in the public and private sector are for transactions to be migrated progressively away from physical fulfilment of transactions (i.e. paper permits / pay and display tickets) to ‘virtual’ fulfilment through online, phone or smartphone application cashless transactions. This benefits the Council through lower administration costs, but compared to the current flexible Visitor Permit, it is difficult to persuasively argue that there is a benefit to residents, with the single exception of those occasions when they have more than one visitor, which can be easily administrated through cashless platforms.
The purpose of this question was therefore to attempt to ascertain the ability or willingness of residents to pay for individual visitor sessions by phone, online or by smartphone app. However, there was some resistance to answering the smartphone question, although the vast majority reported access to the internet in their household.

*Note: as discussed in the section of this report on cashless parking, once registered, the easiest way to pay for individual parking sessions is by smartphone app.*

![Willingness to pay for visitor sessions](image)

The willingness of residents to pay for individual parking sessions against those who didn’t know or would not be willing was split broadly 50/50. However, if it was to be cheaper for residents (assuming an average visit of once per week) the cost of an individual session would have to be 65pence. At these price, for those with visitors twice weekly, the cost would increase from the current £34 to £67. This might prove to be an issue for residents at risk of social exclusion and the Council should consider this further. It is presumed that the Council would not wish to have a discounted fee for residents less able to pay (for example those in receipt of benefits).
Only 72% answered this question, so it cannot be presumed that the remainder would be willing to pay for visitor parking through individual sessions. Amongst those answering, a preference for online purchasing of visitor permits was expressed, this is partly due to the relatively low penetration of Smartphones (for those who were willing to answer). Those without internet access could pay by phone (using the automated interactive voice recognition system provided by the Council’s cashless parking payment provider).

**Q.9 / 10 Do you work / park in Merthyr Tydfil**

These additional questions were not specifically relevant to the operation of the permit zone but were asked to add detail around parking in the town. Unsurprisingly, few people resident in the Controlled Parking Zones parked elsewhere in town, except for trips to Tesco. Just over 40% work in town and most walked to work.
Conclusions:
The survey results reveal:

- There is a problem of supply and demand that results in genuine and regular difficulties for a significant majority of residents in finding parking close to their homes;
- No suggestions to remove the zones were received and to do so would undoubtedly exacerbate these problems;
- The current method of issuing flexible Visitors permits is likely to be contributing to the problem;
- Progressive withdrawal of annual visitor permits and replacement by the payment for individual sessions would ultimately benefit residents by discouraging visitor parking that is not genuine;
- However, there is likely to be opposition to this change, particularly since the price of a Visitor Permit session may have to be set at a level that would financially disadvantage those who have regular visitors, this may include elderly or vulnerable residents;
- Therefore, whilst desirable operationally, financially beneficial for the Council and ultimately good for residents, a change to individual permit sessions should be approached with caution and proactively communicated to residents. It might be accompanied by a reduction in the cost of single Resident Permits with higher costs for second or third permits to make this more palatable.

Financial Implications
From the data provided, it appears that the Council revenue from Residents and Visitors Permits is £10ff the Council wishes to make changes to the current Resident and Visitor
Permit scheme in line with recommendations of this report, there will be a financial implication as well as an impact on residents.

The table below uses the proportion single and multiple vehicles reported by survey respondents. Scenarios are for retention of the existing £34 per residents Permit, and a range of charges for multiple Residents Permits. Each option would result in loss of revenue through Visitors Permits that would be made up by separate payment of individual sessions. This is somewhat difficult to estimate but, as noted above, if the 209 households had an average of 1 visitor per week and this was priced at 65p (the equivalent to the current £34 at a rate of one visitor per week) the revenue would be 209 x 65p x 52 weeks = £7,064. It would appear fair to consider a reduced cost of £20 for a single permit, £30 for a second and £40 for a third vehicle, with a cost of 50p to 70p for a visitor session.

<table>
<thead>
<tr>
<th>Number of cars</th>
<th>Households</th>
<th>Permit costs for 1, 2 or 3 vehicles</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>£34      £10 / £20 / £30         £20 / £30 / £40 £30 / £40 / £50</td>
</tr>
<tr>
<td>1</td>
<td>75%</td>
<td>209      156                £5,304 £1,560.00  £3,120.00 £4,680.00</td>
</tr>
<tr>
<td>2</td>
<td>20%</td>
<td>42       £2,856              £1,260.00 £2,100.00 £2,940.00</td>
</tr>
<tr>
<td>3</td>
<td>5%</td>
<td>10       £1,020              £600.00  £1,200.00 £1,200.00</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>9,180    £3,420              £6,420 £8,820</td>
</tr>
</tbody>
</table>

Plus Visitors Permit estimate: £7,064

| Total Revenue  | £16,244 | £10,484 | £13,484 | £15,884 |

Table 34. Estimated revenue from options for changing Residents and Visitors Permit charges

**Options and Recommendation**

The Council has several options regarding the future of the Residents Permit area.

**Option 1.** Do nothing. It is perfectly possible to continue with the existing Permit scheme and retain the same charges. However, given the findings of the surveys and discussion with Council CEOs, the situation is clearly not optimised. Therefore there appears to be an impetus for change.

**Option 2.** Withdraw unregistered Visitors Permits and replace with individual sessions, but keep the Residents Permit at the same price, no matter how many Permits people have. There will be some reluctance amongst a proportion of residents, particularly those who have frequent visitors and are most price sensitive.

**Option 3.** Progressively withdraw unregistered Visitors Permits (i.e. do not renew them as they expire) and replace with individual sessions booked by phone or online. Reduce the cost of the Residents Permit for the first vehicle, increasing the price for further vehicles. This appears to have the advantage of probably being cost neutral or revenue generative and also being fairer by offering a carrot (reduced Resident Permit costs) against the stick (replacement of unregistered Visitor Permits with individual purchase of sessions). It will also help to reduce problems of problems finding space to park.

**Option 3 is recommended for consideration by the Council.**
6.3 Uncontrolled Streets

The rationale for carrying out surveys to the uncontrolled streets to the streets at the rear of Merthyr College (Cae’r Wern and other streets in the Ynysfach area) and also Georgetown, were:

- The Council’s remit to research parking ‘displacement’
- Feedback from Council CEOs
- Consultation with Merthyr Valley Homes
- Discussion with Merthyr College

A total of 176 surveys were carried out across the following streets, with 106 surveys in the Cae’r Wern area and 70 in Georgetown:

<table>
<thead>
<tr>
<th>Llwyn Berry</th>
<th>Howell Close</th>
</tr>
</thead>
<tbody>
<tr>
<td>Llwyn Celyn Close</td>
<td>Llwyn dic Penderyn</td>
</tr>
<tr>
<td>Cae’r Wern</td>
<td>Nantygwyneth Court</td>
</tr>
<tr>
<td>Celyn Court</td>
<td>Nantygwyneth Street</td>
</tr>
<tr>
<td>Dixon St</td>
<td>Old School Close</td>
</tr>
<tr>
<td>Heol S O Davies</td>
<td></td>
</tr>
</tbody>
</table>

Table 35. Uncontrolled streets surveyed

The surveyors noted whether the houses had an off street parking space. Exactly half of properties (88) did have a driveway, most of these are in the Cae’r Wern area, where 50% of respondents had off street parking, whilst only 36% of Georgetown households did.

The questions asked for residents of uncontrolled streets were similar to those for controlled streets, with the removal of those referring to existing permits / controls.

1. How many cars does your household own (residents only not visitors)
2. Do you have problems finding a space to park in your street
   What do you think should be done to control parking in your local streets
   Nothing
   Restrict parking to residents and visitors
   Other
3. Does your household have access to the internet / a smartphone?
4. Do you work in Merthyr Tydfil
5. Do you park in Merthyr Tydfil Town Centre / where / how frequently?

Table 36. Survey questions – uncontrolled streets

Q.1 How many cars does your household have?
Average number of cars per household was reported to be 1.3. The highest was 3. Distribution of responses was:

<table>
<thead>
<tr>
<th>Number of cars</th>
<th>Households</th>
<th>% surveyed</th>
<th>% in Wales (2011/12)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>6</td>
<td>3%</td>
<td>24%</td>
</tr>
<tr>
<td>1</td>
<td>116</td>
<td>66%</td>
<td>40%</td>
</tr>
<tr>
<td>2</td>
<td>48</td>
<td>27%</td>
<td>36%</td>
</tr>
<tr>
<td>3</td>
<td>6</td>
<td>3%</td>
<td>Not reported</td>
</tr>
<tr>
<td>Total</td>
<td>176</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 37. Number of cars per household – uncontrolled streets

(source of national statistics http://wales.gov.uk/statistics-and-research)

The distribution of cars per household was similar to that in the controlled streets although average ownership was slightly higher at 1.3 cars per household. However, Georgetown residents reported 1.46 cars per household, whilst those in the Cae’r Wern area reported only 1.21 cars per household.

Q.2 Do you have problems finding a space to park in your street?

This question is the heart of the survey. As noted above, Merthyr Valley Homes had carried out extensive consultation regarding the implementation of a Residents Parking Zone. This was in response to high volumes of complaints regarding to parking by non-residents and was on the basis of the same charges being levied as for other schemes in Merthyr Tydfil. Only 21% were in favour. It is suspected that the issue of payment is primarily responsible for the rejection of the proposal. Therefore, this questionnaire was designed to quantify the proportions of residents who experience problems and also put the options to address these without including the issue of cost.

![Pie chart showing the distribution of responses to the question: Do you have problems finding a space to park in your street?]

- **Always**, 68, 39%
- **Frequently**, 19, 11%
- **Sometimes**, 16, 9%
- **Rarely**, 15, 8%
- **Never**, 58, 33%

Do you have problems finding a space to park in your street?
As can be seen, half of residents report constant or frequent problems. Unlike the survey of controlled streets, a discernable difference in distribution of responses between the two areas can be noted, as shown in the chart below.

Figure 49. Frequency and location of problems

Residents of Cae’r Wern are somewhat more polarised in their views. This – and the evidence from residents comments - suggests that some streets, nearest the College – have significant problems, whilst others closer to the A470 and further from the College do not. A slight exception to this is that some streets further from the College reported problems during Rugby Games.

Q.3 What do you think should be done to control parking in your local streets?

A significant majority report that they would support the imposition of a resident and visitor parking restriction. This does not significantly vary by area.

Figure 50. Suggested actions
Irrefutably, as evidenced by the Merthyr Valley Homes experience, this enthusiasm for a Residents and Visitors Permit scheme would be significantly diminished by the imposition of charges.

**Q.4 Does your household have access to the internet / a smartphone?**

There was a slightly higher response claiming not to have internet access, and less resistance to the question about smartphones. This also indicates that any attempt to make the imposition of a Permit scheme available through cashless channels only must be carefully thought through and consulted.
Figure 53. Do you work in Merthyr Tydfil?

A slightly higher, but similar percentage of respondents work in Merthyr Tydfil as in the controlled streets.

Figure 54. Do you park in Merthyr Tydfil?

A surprising number claim to park in the St Tydfil car park. Unsurprisingly Tesco is the most popular choice. Of those remarking always / frequently almost all are Tesco parkers.
**How Frequently do you use town centre car parks?**

- **always, 23, 14%**
- **frequently, 72, 44%**
- **sometimes, 39, 24%**
- **rarely, 15, 9%**
- **never, 15, 9%**

**Figure 55.** Frequency of parking in town?

**Options**

The options open to the Council are:

- **Do nothing, enabling a large number of non-residents to continue to park in uncontrolled streets, but review yellow line provision;**
- **Consider a partial scheme where only the streets where the worst problems are become controlled;**
- **Begin consultation to implement a Residents and Visitors Permit Controlled Parking Zone at the current £34 per annum rate for each covering all currently uncontrolled streets in the Ynysfach and Georgetown areas; or**
- **Begin consultation for a lower priced scheme.**

**Option 1:** It is clearly possible to continue with the current situation. Since the College is not proposing to expand its staff or student numbers, the problem should not get worse. It is likely that some action would be required, given the responses to residents’ concerns previously advising that the implementation of further yellow line highway controls may be considered after the completion of the road works and opening of the River Taff car park. Therefore, a review of yellow lines would be at least a gesture to residents that the Council has listened to its concerns.

**Option 2:** To partially control streets (very common) has the advantage of directly relating the implementation of restrictions to reported problems and also has a higher chance of gaining a majority during consultation.

Experience shows however, that displacement occurs very quickly. The further streets in the Ynysfach area that are currently not experiencing problems would soon do so and the Council would have to go through the consultation and implementation process all over again. Therefore it is not recommended that the Council considers a partial scheme.

**Option 3:** To begin consultation for a scheme based on the existing permit prices so soon after the survey by Merthyr Valley Homes was rejected would likely achieve the same
result and set back the chances of being able to successfully deliver a scheme. This is not recommended.

Option 4: Consult on a lower price scheme that would seek to achieve three objectives:

- Demonstrate that the Council has listened and understood the views and concerns of residents relating to parking difficulties and also price sensitivity, thereby increasing the likelihood of majority support;
- Encourage College staff and students to park in the River Taff and St Tydfil car parks, generating revenue for the Council;
- Enable a transition to individual visitor permits in current Controlled Parking Zones by reducing the cost of Residents Permits there as well.

Option 4 is recommended.

Financial Impact

As noted in the previous section on Controlled Streets, the implementation of a Residents Parking Zone will have a different financial outcome depending on the Permit charge and the approach to Visitors Permits. The table below summarises the potential impact, using the same 65p per visitor session and a range of permit charges, from the current £34 for all permits to the increasing of charges for a second and third permit. The number of households across both areas has been estimated at 500, based on visual observations, but this figure is an approximation.

<table>
<thead>
<tr>
<th>Number of cars</th>
<th>% from survey</th>
<th>Households</th>
<th>Permit costs for 1, 2 or 3 vehicles</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>500</td>
<td>£34</td>
</tr>
<tr>
<td>1</td>
<td>66%</td>
<td>330</td>
<td>£11,220</td>
</tr>
<tr>
<td>2</td>
<td>27%</td>
<td>136</td>
<td>£9,248</td>
</tr>
<tr>
<td>3</td>
<td>3%</td>
<td>17</td>
<td>£1,734</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>483</td>
<td>£22,202</td>
</tr>
<tr>
<td>Plus Visitors Permit estimate:</td>
<td></td>
<td></td>
<td>£16,900</td>
</tr>
<tr>
<td>Total Revenue</td>
<td></td>
<td></td>
<td>£39,102</td>
</tr>
</tbody>
</table>

Table 38. Potential revenue from changes to Residents Permit costs

Some residents clearly believe that there is a parking restriction in place already (due to the advisory signage installed by MV Homes) and call for more enforcement. The application of more yellow lines is also requested across all categories of response to this question. All evidence from the survey is that the problems are entirely due to Merthyr College staff and students and not employees or users of the adjacent locations (Custody Suite, EE Building, Welsh Assembly Government and Merthyr Leisure Village). The aerial view below supports this, as do observations which demonstrate that the walking routes
from the Cae'r Wern area to the College are far better than those to the other locations listed.

1. Merthyr College
2. Rugby Ground
3. Custody Suite
4. EE Building
5. Welsh Assembly Government Building
6. Merthyr Leisure Village
6.4 Conclusions

- There is a strong appetite for an enforceable parking restriction to be implemented both in the Cae'r Wern area and in Georgetown, due to parking by Merthyr College staff and students (and possibly some other town centre employees);
- However, there is also significant concerns about cost and indications of price sensitivity around parking in general;
- If a Permit scheme were implemented at a lower cost, it is likely to be agreeable to a majority of residents following a formal consultation process. The level of permit is suggested at £20 for a first Permit, £30 for a second and £40 for a third;
- Since half of all residents in uncontrolled streets have off street parking they would only have to pay for a second or third vehicle (this would need an administrative arrangement where their Permit covered any one of two, or any two of three vehicles);
- Levels of internet / smartphone penetration are such that – if cashless permit parking only were implemented – significant numbers may have to pay by phone, this could be achieved through the automated Interactive Voice recognition system provided by the Council's cashless parking payment provider;
- Because of the potential downside elements of putting parking controls in place, caution should be employed and proactive communications undertaken by the Council and Merthyr Valley Homes;
- Now that the road and car park construction projects are coming to a close, urgent consideration should be given to the application of new double yellow lines, as previously requested by residents, in advance of any other changes;
- It is conceivable that a partial Controlled Parking Zone, covering only those streets closest to the steps leading to the College might be a practical solution, but this would create some complication and further displacement beyond the edge of the zone. Whilst it might assist in gaining support, it would not be sustainable and would therefore represent a higher cost solution as the Zone would undoubtedly need to be extended.
- A free of charge permit scheme would undoubtedly be acceptable, but charging the current rate won’t be agreed by the majority. Therefore a lower cost scheme seems the most likely option to be agreed by residents.
- If the Council were to consider a reduced cost Permit scheme, there would be some resulting increased revenue through greater use of the Tarff River car park. This may create dissatisfaction amongst existing Permit holders, but presented as part of a change to overall permit regimes it might be more palatable. Particularly, if the Zone A and B Permit holders, on expiry of their residents and Visitors Permits are offered the same rates as the currently uncontrolled streets.
7 Town centre on-street

7.1 Current situation

The streets within the town of Merthyr Tydfil contain a mixture of one and two way traffic flows. Circulation within the town has changed with the creation of Penderyn Square and the completion of the River Taff Central Link scheme. Observations, stakeholder discussions and the results of the survey of town centre businesses demonstrates that elements of on-street parking and enforcement should be reviewed.

7.1.1 Issues and challenges

During a relatively short period of time observing vehicle activity in the town centre, numerous contraventions were observed. For example, in the left hand the picture below, taken from the Red House, shows a goods vehicle parking on a double yellow line, just beyond the block barriers, with offside wheels well on the pavement at 13.50 on a Monday afternoon. The vehicle driver went into premises on the road opposite and returned just over 3 minutes later. If the block barriers could be extended to beyond the bend in the road this would not be possible and the driver would have to use the bays opposite the bank around the corner.

![Evidence of loading contraventions](image)

Figure 56. Evidence of loading contraventions

In the right hand picture a pick-up truck is parked fully on the pavement in a double yellow line section of Pontmorlais, directly adjacent to a 'No Loading at any Time' sign. This is blocking the footway and in the longer term will cause damage to kerbs and footways.
7.1.2 Welsh Government Quarter on-street

The area leading to the Welsh Government Building, Orbit Business Park and Police Custody Suite was previously uncontrolled. In February 2014, due to issues of highway obstruction and safety, the Council imposed parking restrictions and designated the two separate areas as short and long stay. Whilst this initially caused some negative feedback from the Welsh Government, it is now accepted that this is appropriate. Observations are that the long stay area is well used and tickets are being purchased from the pay and display machine. The area also has the historic charging structure, including the display of 5 and 6 day tickets, the only car parking to display these tariffs.
However, the short stay area – being restricted to 2 hours maximum stay – is not being used. The Welsh Government strongly believes that the short stay should be re-designated as 4 hours maximum, since their visitors frequently require more than 2 hours. This would generate additional revenue to the Council and is recommended.
7.2 Feedback from retailers

It was proposed that the views of retailers and businesses in the town be sought, specifically in relation to the provision of loading and short stay on-street parking in the town. A database of businesses was provided by the Business Improvement District and Town Centre Manager. Since not all businesses are in email contact, a postal survey was agreed as being the most practical method. A total of 328 surveys were posted with a stamped addressed return envelope. A total of 101 surveys were returned, a 31% response rate, which is unusually high for postal surveys. The distribution of streets that returned surveys is shown below.

<table>
<thead>
<tr>
<th>Street</th>
<th>Survey Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beacons Place</td>
<td>2</td>
</tr>
<tr>
<td>Castle Yard</td>
<td>1</td>
</tr>
<tr>
<td>Chuch Street</td>
<td>4</td>
</tr>
<tr>
<td>Church Street</td>
<td>2</td>
</tr>
</tbody>
</table>
Table 39. Retailer survey responses by street

<table>
<thead>
<tr>
<th>Street</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Courtland Terrace</td>
<td>1</td>
</tr>
<tr>
<td>Glebeland Street</td>
<td>13</td>
</tr>
<tr>
<td>Graham Way</td>
<td>2</td>
</tr>
<tr>
<td>High Street</td>
<td>29</td>
</tr>
<tr>
<td>Indoor Market</td>
<td>1</td>
</tr>
<tr>
<td>John Street</td>
<td>5</td>
</tr>
<tr>
<td>Lower High Street</td>
<td>4</td>
</tr>
<tr>
<td>Market Square</td>
<td>2</td>
</tr>
<tr>
<td>Masonic Street</td>
<td>1</td>
</tr>
<tr>
<td>New Market Walk</td>
<td>3</td>
</tr>
<tr>
<td>Pontmorlais</td>
<td>11</td>
</tr>
<tr>
<td>Principality Arcade</td>
<td>1</td>
</tr>
<tr>
<td>River walk</td>
<td>1</td>
</tr>
<tr>
<td>Shopping Centre</td>
<td>1</td>
</tr>
<tr>
<td>St Tydfil Centre</td>
<td>2</td>
</tr>
<tr>
<td>Swan Street</td>
<td>3</td>
</tr>
<tr>
<td>Tramroadside North</td>
<td>1</td>
</tr>
<tr>
<td>Upper Thomas Street</td>
<td>1</td>
</tr>
<tr>
<td>Victoria Street</td>
<td>7</td>
</tr>
<tr>
<td>Wheatsheaf Lane</td>
<td>2</td>
</tr>
</tbody>
</table>

The questions asked to retailers were:

1. Street that your business is in
2. What parking restrictions apply to the street that your business is located in?
3. At what time(s) do you usually load and unload items required for your business?
4. What type of vehicle do you (or your suppliers / deliveries) use to load and unload for your business?
5. Would you support the re-designation of goods loading only bays in the town centre?
6. How many people do you employ?
7. What percentage of your staff drive to work approximately?
8. If they drive to work, where do they park?
9. Do you have any other comments about parking in the town?

A copy of the questionnaire is provided at Appendix D. Survey responses are detailed below, with narrative observations.

Q.2 What parking restrictions apply to the street that your business is located in?
Restrictions most reported were goods loading only and 20 minute short stay parking. The distribution of responses is representative of the actual restrictions in the town and supports the robustness of the survey findings in drawing conclusions around the opinions of retailers as to the appropriate use of on-street capacity.

Q.3 At what time(s) do you usually load and unload items required for your business?

Retailers report that they load and unload throughout the day. This is likely to represent a resistance to the idea that the permitted hours for loading be restricted. Half of those surveyed stated that they currently load between 09.00 and 15.00.
Q.4 What type of vehicle do you (or your suppliers / deliveries) use to load and unload for your business?

<table>
<thead>
<tr>
<th>What vehicle do retailers use to load / unload?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goods vehicle N1</td>
</tr>
<tr>
<td>10</td>
</tr>
</tbody>
</table>

Figure 63. Vehicles used

Respondents were asked which vehicles were used for loading and unloading to support their business. A definition of the three common types of goods vehicles was given as follows:

‘A goods vehicle is categorised as being designed and constructed for the carriage of goods and having a maximum mass not exceeding 3.5 tonnes (N1), not exceeding 12 tonnes (N2) or exceeding 12 tonnes (N3)’.

Most businesses use private cars for loading and unloading, with only a very few using the heaviest category of goods vehicles. This is consistent with visual observation and discussion with Council CEOs. It supports the principal of removing Goods Loading Only restrictions. However, the businesses that did report using category N3 are spread evenly across the town, including Glebeland Street, Pontmorlais and the Lower High Street. As noted earlier in this report, the uncontrolled loading and unloading of LGV / HGV vehicles does cause congestion problems. There is a risk that the removal of the Goods Loading Only bays might exacerbate this issue. However, there appears to be a willingness to flout existing restrictions by LGV / HGV drivers. It is worth considering, in the medium term the designation of permitted hours for HGV loading / unloading, for example before 11.00 only). This would require However, in the short term, a consistent policy of enforcement of highway obstruction by LGV / HGV drivers should be applied.

Q.5 Would you support the re-designation of goods loading only bays in the town centre?

A significant majority would support the replacement of goods loading only bays with dual use short stay parking and loading bays.
Figure 64. Opinion regarding goods loading only bays

Q.6 How many people do you employ?

Businesses were asked to report how many people they employ within defined ranges. The survey results show that Merthyr Tydfil town centre is largely populated by small to medium sized business that have 10 or fewer employees. Of those respondents reporting high numbers of employees, shown in the list below, it is likely that only a relatively small number will be on the premises at any particular time.

Nightingales Nursing Recruitment Agency
Merthyr Tydfil Housing Association
Voluntary Action Centre
JNP Legal
Motaquote
Pulman (accountants)

Table 40. Employers reporting more than 30 employees

It was not intended that this survey enables a count of the number of employees working in the town centre. However, if we take the middle of each of the ranges and apply this number to the number of respondents, it indicates that these business may employ around 775 people. If we were to scale up from the 31% response rate, this would indicate approximately 2,500 employees.

<table>
<thead>
<tr>
<th>Range of employee numbers</th>
<th>Numbers reported</th>
<th>Middle of range</th>
<th>Estimated employee numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 to 3</td>
<td>37</td>
<td>2</td>
<td>74</td>
</tr>
<tr>
<td>4 to 10</td>
<td>38</td>
<td>7</td>
<td>266</td>
</tr>
<tr>
<td>11 to 20</td>
<td>12</td>
<td>15</td>
<td>180</td>
</tr>
<tr>
<td>21 to 30</td>
<td>3</td>
<td>25</td>
<td>75</td>
</tr>
</tbody>
</table>
More than 30 | 6 | 30 | 180  
Total | | | 775  

Table 41. Numbers of employees reported

<table>
<thead>
<tr>
<th>How many employees do you have?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 to 3</td>
</tr>
<tr>
<td>40</td>
</tr>
</tbody>
</table>

Figure 65. Number of employees

**Q.7 What percentage of your staff drive to work approximately?**

Businesses responding reported a high proportion of their employees driving to work. The overall percentage is 65%. If the number of employees is indeed around 2,500, then the town parking capacity in total, including uncontrolled streets, Council off-street car parks, private parking would need to accommodate around 1600 cars per day, without taking Council or other employees into account. *(note: Tesco is a large employer and did not respond to the survey although, when interviewed, they reported that ‘very few’ of their employees drive to work.)*
Q.8 If they drive to work, where do they park?

Castle Street was the single most popular car park.

![Figure 66. Percentage driving to work](image)

Q.9 Do you have any other comments about parking in the town?

A complete list of comments is provided at Appendix E. Unsurprisingly, the single biggest issue reported was price. This is broken down into parking prices for customers and for businesses / employees.

The ‘other’ category was broken down as follows (most did not provide details of the location).

**Other parking locations**
- Crown pub: 2
- Merthyr Leisure Village: 5
- Castle Bingo: 1
- Private car park on premises: 7
- Car park behind Tesco: 1
- Wherever we can: 1
- Didn’t say: 25

Table 42. ‘Other’ car parking used by employees
One issue noted was that there is believed to be capacity during the day in the Residents Controlled Parking Zones. Four businesses requested that they be allowed to apply for a Business Permit to park in these Zones during the day. However, evidence from the survey of residents indicates that this is not an option that should be considered.

Many businesses reported problems with either parking, loading / unloading or both. The general trend of responses is that parking supply is adequate. Some respondents felt that the changes to road layouts and traffic flows had disadvantaged their business.

Whilst a few businesses commented that parking prices were a contributory factor to the perceived decline in retail trade and use of the Cyfartha Retail Park, this was not a significant or majority view.

Conclusions

- The goods only loading restriction is no longer appropriate for the needs of the town centre
- There appears to be popular support for changing to dual loading / short stay parking
- This would improve consistency enforcement for CEOs and would be simpler to understand for users
- The Council needs to determine the appropriate duration of free short stay parking and the time period for no return.
- If this is set at 20 minutes free for all on-street bays (apart from disabled bays), this would allow for a single visit to a premises such as a bank or shop, encouraging longer or multiple purpose visits to use the Ty Gwyn car park or the Council’s off-street car parks.
To support this, a 2 hour no return period is probably appropriate. There appears to be no compelling reason as to why the other 30 minute or 1 hour short stay provisions should not also be changed to 20 minutes, this would provide consistency and a simple, comprehensible hierarchy of free and chargeable capacity in the town for visitors.
8 Merthyr Leisure Village

8.1 Current situation

Merthyr Tydfil Leisure Village (MTLV) is part owned by Merthyr Tydfil County Borough Council (MTCBC) and part owned by Atlantic Property Developments (APD). It is a successful operation, with a popular mixture of leisure and entertainment activity, including a Leisure Centre, owned by MTCBC. Daytime parking at the site is becoming constrained at times. This is believed to be due to long stay vehicle parking by non-users, many of whom may be employees of the Welsh Government Building or people working in the town centre. These long stay parkers would ideally be using parking capacity close by that is provided for this purpose, specifically the soon to reopen Taff River car park.

MTCBC and APD wish to work together to ensure that the parking capacity at the village is available for users and Leisure Village employees and that long stay parkers are deterred from using the Leisure Village, and have discussed options for how this might work in practice. In order to be successfully implemented, the implementation of parking controls requires the consideration of the site as a whole. Consultation with Council stakeholders and APD confirms that simply imposing charges on the Council owned car parking capacity, whilst leaving the rest of the site free is not acceptable and is also operationally unworkable.

The Council is also establishing a Leisure trust to operate the Leisure Centre and needs to consider whether to transfer the car parking as part of establishing the Leisure Trust. If the Council were to retain the site, it is also minded to charge employees of the Leisure Centre (which is becoming a separate Trust) for parking, in line with other town centre Council and private sector employees. However, since APD does not wish to charge for its tenants’ employees, there would be inconsistency, which may lead to some negativity amongst Leisure Trust staff. If the establishment of the Leisure Trust included the parking, it is likely that the Leisure Trust would retain free parking for its employees.

8.2 Options

Six options have been identified as being worthy of appraisal:

1) Do nothing, maintaining the free parking for all;  
2) Introduce charges for the Council owned section only;  
3) Introduce charging, including daily and season ticket charges for long stay parking, with three hour free parking and a £3.50 all day charge;  
4) Introduce charging as option 3, but with four hour free parking and a stepped tariff structure to enable MTLV users to stay beyond four hours if required;  
5) Provide free parking for legitimate users of the Leisure Village with long stay parking not permitted, unless in connection with Leisure Village activity;  
6) Transfer the Council owned parking to the Leisure Trust.

As outlined in the rest of this section, Options 4, 5 or 6 are recommended for further development, discussion and adoption. One issue which impacts on the proposed option
is that the Council has advised that, in its opinion, the levying of additional Business Rates is unlikely to be avoidable, whichever option (apart from Option 1) is chosen. The level of rate, estimated at £30,000 per annum, is likely to be greater than the revenue generated from the site. This means that imposing restrictions only make sense as part of a wider strategy to implement control and pricing to encourage the use of parking capacity for the purpose that it was provided – in this case for users of the Leisure Village. However, if subsequent advice is that Option 5, to impose only a time restriction and not levy any charges, would result in no Business Rates liability, the balance may be weighted towards this option.

8.3 The Leisure Village

Attractons at the MTLV include:

- Merthyr Tydfil Leisure Centre, providing gyms, keep Fit Classes, swimming pools, swimming lessons, sport facilities, dance classes and other activities of value to the community, averaging 35,000 visits per month between July 2013 and June 2014.
- Vue Cinema with eight screens, showing all the latest popular films.
- A busy Travelodge
- Numerous food outlets, including Frankie and Bennie’s, The Oriental garden, The Dragonfly pub and restaurant, Nando’s and a drive through McDonalds.
- A skate park, popular with young people
- The Rhydycar indoor bowls club
The estimated maximum numbers of employees at the Leisure Centre parked at any single time is estimated at around 30, whilst the estimated maximum number of employees parked across the Atlantic owned outlets at any one time is approximately 80.

### 8.3.1 Parking capacity and demand

There are 810 spaces in total provided at the MTLV, which are not separately advertised or controlled, although they are spread across the site as follows:

<table>
<thead>
<tr>
<th>Zone</th>
<th>Standard Spaces</th>
<th>Blue Badge Spaces</th>
<th>Closest Premises</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>225</td>
<td>8</td>
<td>Bowls Centre, Leisure Centre</td>
</tr>
<tr>
<td>2</td>
<td>43</td>
<td>9</td>
<td>Leisure Centre</td>
</tr>
<tr>
<td>3</td>
<td>93</td>
<td>0</td>
<td>Vue</td>
</tr>
<tr>
<td>4</td>
<td>68</td>
<td>0</td>
<td>Leisure Centre</td>
</tr>
<tr>
<td>5</td>
<td>194</td>
<td>10</td>
<td>Vue, Nandos, Subway</td>
</tr>
<tr>
<td>6</td>
<td>30</td>
<td>2</td>
<td>Dragonfly (rear), Travelodge</td>
</tr>
<tr>
<td>7</td>
<td>78</td>
<td>7</td>
<td>Dragonfly (front) Frankie &amp; Bennie, Oriental Garden</td>
</tr>
<tr>
<td>8</td>
<td>39</td>
<td>4</td>
<td>Harvester, McDonalds</td>
</tr>
</tbody>
</table>

**Total** | 770 | 40

Table 43. Parking capacity at Merthyr Tydfil Leisure Village

The extent of the Council’s owned car parking is estimated at 298 standard parking bays and 17 blue badge bays. The slight room for error in this calculation is the strip of land behind the Leisure Centre that the Council owns, but cuts across a series of parking bay rows.

Not all visitors or employees to the MTLV will access by car. Additionally, whilst there are on average over 1,000 visits to the Leisure Centre alone each day, these are staggered across the day. Many of the APD tenants’ activities are evening based. Therefore, if the available parking capacity is taken up by only MTLV users, supply of parking is adequate during daytime hours. Whilst the MTLV parking has frequently been observed to be over-subscribed in the evening, with large numbers of vehicles parked outside marked bays, it is not proposed to introduce any controls or charges to address this.

Previous research commissioned by the Council reported that the site was providing adequate parking capacity for all users. The Council also carried out its own assessment of usage. However, since this time, both the Council and Atlantic believe that the site is being placed under increasing pressure through some of the parking capacity being used by employees. These are not MTLV employees, but those working in the town or other close by employment locations, taking advantage of free parking at the site.

The Council is considering the implementation of controls to discourage all day employee parking at the MTLV. Atlantic supports this in principle and wishes to work with it to

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6 ‘Merthyr Tydfil Town Centre – Car Parking Evaluation and Strategy’, Miller Research September 2013
7 MLV survey report May 2014
Merthyr Leisure Village

implement a sustainable solution. Its preference is that a control regime would enable all users and employees of the Leisure Village to park easily and without charge, but would deter those vehicles parked by non-Leisure Village users. The Council is also reopening the Taff River (formerly College South) car park towards the end of 2014, following refurbishment works and believes this facility is convenient for both the Welsh Government building and the College (and is considering discounted permits to incentivise take up). Implementing charges, even with a three or four hour free period risks making the centre less attractive to users. There is also a likelihood of displacing vehicles currently parking in the MTLV into local uncontrolled streets, such as Cae'r Wern.

8.3.2 Current Usage

It is difficult to accurately estimate how many vehicles each day are parked in the MTLV that are not associated with the Leisure Village. The categories into which these vehicles might be placed include:

- Employees working at the Welsh Government Building
- College users
- Other employees

**Welsh Government Building**

The Welsh Assembly Government building was constructed in 2006 and currently employs around 600 people, with additional daily visitors. There are 252 spaces, which are allocated for employees and visitors according to need. However, the facility is significantly over-subscribed. Employees at the building are highly car dependent, originating from well beyond the walking catchment of the premises and with limited public transport options. The WAG building is approximately 400 metres walk from the Leisure Village. Given the close proximity and the greater number of employees to car parking spaces it is entirely understandable that the MTLV free parking provision is attractive to WAG employees.

The WAG Facilities Manager is aware of the Council’s intention to introduce parking controls and is keen to enter into dialogue so that any changes to parking that affects WAG employees is jointly communicated at the appropriate time, including the provision of a discounted paid Permit for the Taff River car park.

The WAG office believes that 50 or fewer of its employees park there on average per day, but admits this is anecdotal and it does not have any evidence. It also accepts that the Taff River car park is more suitable for WAG employees as it is broadly the same distance to the WAG building as the MTLV site (depending where in each of the two facilities people park). However, it has a gentler gradient and is a more attractive pedestrian route. It also feels safer from a road safety perspective, since there are no pedestrian crossings between the Leisure Village and the WAG building approach road and cars using the roundabout between the two locations do so at speed.

However, the WAG considers that there are concerns of personal security that may deter its employees from using the path, particularly in the winter months. It therefore requests that discounted permit durations are made available if the Council is minded to do so, preferably monthly. It is likely that if the Council agrees to such as a discounted permit for Taff River that some WAG employees who are willing to pay for parking will purchase
these, whilst others may seek uncontrolled on-street parking. The nearest uncontrolled streets are in the Cae’r Wern area, but the walking route is across rough ground as it unlit.

Note: the WAG wishes to discuss a potential change to the on-street bays, whereby both strips of on-street parking would provide for at least four hours, since they state that many of their visitors stay for more than 2 hours. This change would be revenue generative for MTCBC and is recommended.

Merthyr College

Merthyr College has around 2,000 students and 200 full time staff. The catchment area of the College for both staff and students is local, but not within reasonable walking distance except for a small minority of people. The College believes that very few students drive (fewer than 50), whilst many staff do. The College is in close proximity to the St Tydfil car park and the Taff River car park. The College does not believe its staff or students park in the MTLV, although it acknowledges that they do park in large numbers in streets at the rear of the college. The Council is in discussion with the College for the possible provision of discounted permits.

Other possible users

It is a short walk from the MTLV to the town centre and it is possible that employees (or visitors to the town centre for other purposes) may park in the MTLV to avoid parking charges in the town centre and also to avoid the road work disruption. For the purposes of this paper and the appraisal of the options for the MTLV site, an assumption of 100 vehicles parking daily who have long stay employment purposes outside the Leisure Village has been made. This is calculated from visual observations of the numbers of vehicles parking before 09.00 on weekday mornings.

8.3.3 Cabinet Consideration of an Off Street Parking Places Order

As a result of concerns about parking in the MTLV by non-users, the Council Cabinet considered a paper for the implementation of charges at the site. The paper presented the following proposal:

‘Council Cabinet report 30 July 2014: To remove Merthyr Leisure Village Car Park from The Off Street Parking Places Order, to incorporate Merthyr Tydfil Leisure Centre North Car Park, Merthyr Tydfil Leisure Centre East Car Park …. to impose charges at the Merthyr Tydfil Leisure Centre North Car Park and at the Merthyr Tydfil Leisure Centre East Car Park and to make the necessary amendments to the Order should any car parks be transferred as part of the Leisure Trust’.

The Council has been considering whether to transfer any parking capacity to the Leisure Trust and this remains an option. The references to the ‘North’ and ‘East; car parks in the MTLV are those areas of the site owned by the Council as shown in the excerpts from the maps, shown below:
It was proposed that ‘For these two car parks between the hours of 8am and 6pm on Monday to Friday it is proposed that the first 3 hours would be charged at £0. Thereafter there would be a charge of £3.50 all day. Saturdays and Sundays would not be subject to car parking charges’.

Discussions with Atlantic Property Developments have confirmed that there is support in principle for the Council’s intention to control parking spaces and that APD would be willing to participate in the development and implementation of a suitable scheme, subject
to consultation with its tenants, and confirmation of scheme capital and operational expenditure, with a negotiated share of such costs. However, Atlantic is not supportive of the Council unilaterally imposing charges on the Council owned car park capacity, since this would result in the strong likelihood of the Atlantic owned car park supply being used before any paid parking was taken up. Therefore, a successful and sustainable scheme should have joint objectives, suggested below.

8.3.4 Objectives

Following consultation with both MTCBC and APD, it is proposed that the objectives for implementing a system of parking controls at the MTLV site are:

- Supporting the use of the MTLV for leisure and entertainment purposes;
- Controlling the use of the parking capacity by persons employed elsewhere in the town;
- Encouraging long stay use of other chargeable parking facilities in reasonable proximity to employment locations provided by the Council; and
- Ensuring an efficient cost, both of implementing and operating any system of control.

8.3.5 Options for implementing parking controls

The options are summarised below:

Option 1: Do nothing

An appraisal of options should always include benchmarking against the option to permit the current situation to continue. However, both the Council and Atlantic recognise that maintaining the current situation is not likely to be sustainable in the medium to long term and that there is a strong rationale in imposing a system of control on the MTLV site. There is a risk that doing nothing will places further pressure on the MTLV parking supply, resulting in inconvenience to genuine MTLV users and potentially deterring use of the Leisure Village, as well as undermining the viability of the Taff river car park. **Option 1 is not recommended.**

Option 2: Introduce charges for the Council owned section only

This option is operationally and administratively straightforward – since no separate company would be required and the existing Council CEO resource could enforce parking restrictions. However, the inevitable outcome would be that MTLV users would fill the remaining free APD owned capacity, leaving the Council capacity to be taken up last – if at all. This option would also result in the fragmentation of the current parking capacity introducing complexity for users. **Option 2 is not recommended.**

Option 3: Implement the charging regime proposed in the Council’s Cabinet Paper

This option has already been considered by the Council Cabinet and is based on a three hour free period, with an all day charge of £3.50. This would be sufficient to deter WAG employees, since the Taff River car park at the same daily price is more convenient. It will also disincentivise town centre employees, as there is room in the Castle Street Multi-Storey car park at the same price, but in closer proximity to the town. However, stakeholder consultation suggests that three hours is not sufficient to accommodate a
small minority of MTLV users, including the visitors to the Bowls Centre and those undertaking multiple activities. **Option 3 is not recommended.**

**Option 4: charging with 4 hours free**

This is Option 3 but with a four hour free period and a different charging structure. Consultation with stakeholders including APD, the Leisure Centre and the Bowls centre, suggests that a 4 hour free period would capture the overwhelming majority of MTLV users. This is also supported by the Council’s previous analysis in May 2014, which showed that 80% of users were parking within the 4 hour period, as shown in the table below. Many of the vehicles parked for more than four hours are likely to be WAG or town centre employees (as well as Leisure Village employees).

<table>
<thead>
<tr>
<th>Duration</th>
<th>No of Vehicles</th>
<th>% Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>McDonalds</td>
<td>201</td>
<td>14%</td>
</tr>
<tr>
<td>&lt;30 mins</td>
<td>305</td>
<td>22%</td>
</tr>
<tr>
<td>30 mins - 1 hr</td>
<td>204</td>
<td>15%</td>
</tr>
<tr>
<td>1hr – 2 hrs</td>
<td>184</td>
<td>13%</td>
</tr>
<tr>
<td>2hrs – 3hrs</td>
<td>116</td>
<td>8%</td>
</tr>
<tr>
<td>3hrs – 4hrs</td>
<td>106</td>
<td>8%</td>
</tr>
<tr>
<td>4hrs – 5hrs</td>
<td>87</td>
<td>6%</td>
</tr>
<tr>
<td>5hrs – 6hrs</td>
<td>50</td>
<td>4%</td>
</tr>
<tr>
<td>6hrs - 7hrs</td>
<td>137</td>
<td>10%</td>
</tr>
</tbody>
</table>

Table 44. Observed durations of parking at MTLV (Source: MLV survey report May 2014)

An important consideration with this option is what to charge MTLV users staying over four hours. It would not be reasonable to impose an all day charge for users (such as those of the Bowls Centre) who might stay for example four and a half hours. Therefore it is suggested that a short stay tariff is provided, which might be:

<table>
<thead>
<tr>
<th>Duration</th>
<th>Tariff</th>
</tr>
</thead>
<tbody>
<tr>
<td>up to 4 hours</td>
<td>Free</td>
</tr>
<tr>
<td>5 hours</td>
<td>£1.00</td>
</tr>
<tr>
<td>6 hours</td>
<td>£2.00</td>
</tr>
<tr>
<td>All day</td>
<td>£5.00</td>
</tr>
</tbody>
</table>

Table 45. Proposed short stay tariffs

This is sufficiently inexpensive to enable MTLV users to enjoy the facilities (£1.00 for five hours parking), whilst also deterring long stay parking by non-MTLV users. Option 4 is recommended if the Council retains its ownership of parking at MTLV.

**Option 5: Maintain free parking for MTLV users, whilst prohibiting long stay parking except for MTLV employees and other authorised users**
This option would be relatively simple to implement. However, it is not yet known definitively whether this option would successfully enable the Council to avoid the levying of Business Rates. Since this option does not generate any revenue from the Leisure Village itself and has operational costs, the only financial rationale for this option is to encourage people currently parking in the Leisure Village to migrate to the River Taff car park. Additionally, the Council has stated that it is minded to charge employees of the Leisure Trust for parking, which renders the options of providing free parking for all other MTLV users problematic. Additionally, the issues around enforcement of restrictions by ANPR for Council owned car parking would still need consideration. **Option 5 is recommended for further consideration pending further legal opinion on the liability for Business Rates.**

**Option 6: Transfer the car park capacity to the Leisure Trust**

If the Council transfers the parking to the Trust, it can legitimately be removed from the Off Street Parking Places Order and therefore managed as private land under the Protection of Freedoms Act (subject to legal advice). This would enable APD and the Leisure trust to work together to manage the site for the good of users as a whole and to consider how long stay parking may be accommodated or deterred, independently of the Council. They would also bear the liability for any Business Rates increases should these materialise.

**Option 6 is recommended for consideration alongside Option 5, subject to the outcome of Council investigations into Business Rates and the legality of withdrawing the Council owned parking from the provisions of the TMA.**

### 8.3.6 Operation of parking at MTLV

Parking at MTLV would be controlled by a separate company, jointly owned by MTCBC (or the Leisure trust) and APD. It would enforce terms and conditions either through:

- Deployment of automatic number plate recognition cameras, operated through software and enforced by the issuing of postal contravention notices, or
- Patrol of the site by a dedicated resource with the issuing of notices to car windscreens.

In either case, payment terminals would be required. The Metric Aura Elite type that the Council has installed to the St Tydfil car park are suitable for this, since they have a full alpha-numeric keypad for the entry of vehicle registrations, which are suitable for ANPR integration. Three machines has been assumed as sufficient, due to the low number of users who will be required to pay. Cashless parking by phone or online would also be provided (see note below regarding Bemrose Booth).

To support such a regime, the MTLV would require a patrolling resource. Since the Council is not able to undertake enforcement services on private land, a separate legal entity would be created and jointly operated on behalf of the Council (or the Leisure Trust) and APD to carry out such enforcement. This could be:

- Sub-contracted to a private parking operator;
- Undertaken by a Council (or Leisure Trust) employed and managed resource; or
- Undertaken by an APD employed and managed resource.
For the purposes of modelling this option, a minimum of 6 hours patrolling per day has been assumed at the currently Council hourly rates of £10.27.

**MTLV Employee Parking**

APD does not support the charging for employee parking, whilst the Council does. Each party is entirely within their rights to adopt these positions, but this does result in inconsistency, which might result in employee dissatisfaction. Further advice has been requested from APD on this matter. It is possible that a situation would result in which employees of the Leisure Trust would be required to purchase permits, which APD tenants would retain free parking. This should be avoided if possible. If the land was transferred to the Leisure Trust, it is likely that they would wish to retain free parking for their own direct employees, which would create some disparity with other Council employees working in the town. However, this disparity already exists (and is also applicable to Council employees in Pentrebach).

**Travelodge**

Check in at the Travelodge is 15.00, therefore anyone parking from 14.00 onwards already benefits from free parking for the rest of the day and up until check out the next day at 12.00 (assuming the maximum stay is applied only with a single day and not cumulatively between days). If residents of the Travelodge park for a longer duration, or are staying for multiple days, they would either be expected to pay the tariff applicable to their stay or input their vehicle registration into the Travelodge website when booking as happens elsewhere.

**Feasibility of ANPR**

Entry to MTLV is by a two lane road, which is easily controllable by ANPR cameras, as shown in the photos below. ANPR cameras would be column mounted somewhere in the area shown by the blue bar in the right hand picture.

![Figure 72. Potential location for ANPR](image)

All vehicles would have their registration numbers recorded by the system and entry and exit records would be automatically matched through software, generating contravention reports for those overstaying the maximum duration. The software would attempt to match these against payment records from the Metric terminals or the cashless payment platform. Any vehicles not matched at this stage would be output to a contravention file.
that would be manually verified by the operator of the system. If a contravention is demonstrated, a decision is made as to whether to request vehicle keeper details from DVLA for issue of a postal contravention notice. This is enforcement of terms and conditions through contract law under the Protection of Freedoms Act 2012 and represents a pre-existing estimate of loss (basically a cost recovery) rather than a legal Penalty such as is imposed in highways or off-street car parks controlled by under the TMA.

Benefits include:
- All contraventions are captured (as long as a reputable provider is employed to operate the system)
- No patroller resources are required to enforce, except for occasional enforcement of blue badge or parking out of bay contraventions

Potential concerns include:
- Negative public perception of ANPR enforcement systems
- Possible future Central Government intrusion into the use of ANPR on private land
- Additional cost of issuing and enforcing postal contravention notices.
- Phone and Pay service and ANPR

The Council has a Phone and Pay facility provided by Bemrose Booth mobile. This has not been taken up by a high proportion of people parking in Merthyr Tydfil, primarily since it costs more and therefore there is little rationale to use it. This is dealt with in the wider strategic parking report. However, the contract with Bemrose Booth mobile also includes provision for ANPR services, delivered through their sister company Creative Parking. This is tantamount to an exclusive contract, since it would not be acceptable to Bemrose Booth to integrate their cashless platform with another ANPR provider. However, since the Council (or the Leisure trust) and APD would establish a separate legal entity to operate parking at MTLV, it might be argued that this restriction does not apply.

Bemrose Booth report that they would provide the ANPR free of charge on a one year basis, but would require that they retain all enforcement income. This is not an ideal model, since experience shows (e.g. providers such as ParkingEye) that over-zealous enforcement and negative publicity is a serious risk.

Options for ANPR are therefore:
- Accept the Bemrose Booth free ANPR and set strict rules for issuing of postal PCNs
- Seek another ANPR provider (as exclusivity within the Bemrose Booth contract does not apply to a separate company) and do not provide a cashless service
- Seek another ANPR provider and seek to procure new cashless services for the whole town.

8.3.7 Financial Appraisal

A financial appraisal of Options 4 and 6 has been modelled, assumptions input to the model are detailed below. This options has been separately appraised with patrol
operation and ANPR operation. Additionally the financial outcomes for both options has been separately modelled for the Council (or Leisure Trust) / APD jointly owned parking operation and also for the Council (i.e. the on-street costs, plus additional income generated on-street and at Taff River).

Capital Costs

If MTCBC (or Leisure Trust) and APD had to jointly fund the capital purchase of an ANPR system, the actual capital cost of an ANPR scheme would be determined during a procurement process. However, similar schemes have previously cost in total around £30,000 to £35,000. Whichever operational option is chosen, an additional allowance of £10,000 has been made for signage and communications and for legal and administrative activities. Capital costs of 3 Metric Aura terminals at £5,000 has also been added to each option, although it is understood that the Council may have already purchased these. Capital costs are therefore £60,000 for ANPR and £25,000 for a patrolled option. **If Bemrose Booth provided the ANPR, the capital costs would be reduced to around £30,000.**

Operational costs

Budget annual operational costs for an ANPR system would be approximately £10,000 for system maintenance and administration of the software and enforcement process. For a non-ANPR operation, a patrolling cost of 6 hours per day has been assumed at the existing Council rates of £10.27, plus 20% for employment overheads (National Insurance, uniforms, handheld devices etc.) This gives an likely annual operational cost of around £20,000. This is the cost that has been assumed in the financial appraisal. For both options, an additional 2 hours per day on-street patrolling by Council CEOs has been allowed for, to ensure that the controlled areas on the approach road to the WAG building are adequately enforced. If Bemrose Booth provided the ANPR, there would be no operational costs.

Income assumptions

Income to the parking operations company will be generated through:

- Sale of permits (presumed to be to Leisure Trust employees, plus any WAG or other employees who did not wish to transfer to the River Taff car park)
- Sale of daily tickets

It is difficult to predict how many Leisure Trust employees will purchase permits, but an assumption of 30 has been made. This is around half the workforce. If the parking is transferred to the Leisure Trust it is to be anticipated that they would continue to provide free parking for their own staff, thus reducing revenue further).

For daily sales, an assumption has been that 10 users per day will pay for an additional hour, 5 users for 2 hours and 2 users for all day parking. Again, this is a difficult quantity to estimate as this is a new situation. Some WAG employees may prefer to pay for a full price parking permit in MTLV rather than a discounted permit at the River Taff car park.

For the Council, it is assumed that 20 vehicles per day will park on-street adjacent to the WAG building with an average tariff of £2.00. With a discounted permit of £300 available at the Taff River car park, 50 users might be expected to transfer from MTLV.

Financial outcome
The table below shows the estimated financial outcome for both the MTLV parking operating company, which would therefore probably require subsidy.

**MTLV Operating Company - MTCBC / APD**

<table>
<thead>
<tr>
<th>Income</th>
<th>Patrolled</th>
<th>Purchased ANPR</th>
<th>Bemrose Booth ANPR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permits</td>
<td>£10,500</td>
<td>£10,500</td>
<td>£10,500</td>
</tr>
<tr>
<td>daily parking</td>
<td>£7,560</td>
<td>£7,560</td>
<td>£7,560</td>
</tr>
<tr>
<td>Enforcement</td>
<td>£10,332</td>
<td>£25,830</td>
<td>£0</td>
</tr>
<tr>
<td><strong>Total Income</strong></td>
<td><strong>£28,392</strong></td>
<td><strong>£43,890</strong></td>
<td><strong>£18,060</strong></td>
</tr>
<tr>
<td>Operational Costs</td>
<td>-£20,000</td>
<td>-£10,000</td>
<td>0</td>
</tr>
<tr>
<td>Management Fee</td>
<td>-£5,000</td>
<td>-£5,000</td>
<td>0</td>
</tr>
<tr>
<td>Business rates</td>
<td>-£30,000</td>
<td>-£30,000</td>
<td>-£30,000</td>
</tr>
<tr>
<td><strong>Total Costs</strong></td>
<td><strong>-£55,000</strong></td>
<td><strong>-£45,000</strong></td>
<td><strong>-£30,000</strong></td>
</tr>
<tr>
<td>Outcome</td>
<td>-£26,608</td>
<td>-£1,110</td>
<td>-£11,940</td>
</tr>
</tbody>
</table>

Table 46. Estimated financial impact of imposing charges

A discussion will be required with APD to agree joint subsidy with the Council or Leisure Trust for the projected loss of the operating company. For the Council as a whole, the additional income gained from the River Taff car park and the increased use of the on-street capacity is estimated below. This is dependent on the number of users willing to use the path between the River Taff car park and the WAG building.

<table>
<thead>
<tr>
<th>Income / costs</th>
<th>impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taff River Permits</td>
<td>£15,000</td>
</tr>
<tr>
<td>daily parking</td>
<td>£10,080</td>
</tr>
<tr>
<td>Costs</td>
<td>-£5,176</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>£19,904</strong></td>
</tr>
</tbody>
</table>

Table 47. Potential annual revenue benefit to the Council after costs
9 Blue Badge parking

9.1 Disabled Parking Policies

Most Local Authorities do not publish a policy on disabled parking. However, they offer comprehensive information on their websites about how to apply for a Blue Badge, the availability and restrictions of Blue Badge parking in their Council areas and – in some cases – the circumstances in which the Council will undertake the provision of on-street disabled bays.

Merthyr Tydfil CBC has been considering whether to establish a policy for disabled parking, which covers the provision of advisory on-street disabled parking bays, as well as wider parking provision for disabled people, both on- and off-street. The websites of all Local Authorities in Wales have been reviewed as well as a selected few in England. No Welsh Council provides an online published policy on disabled parking. Therefore the Council does not specifically need to do this. However, it wishes to have a formulated response to any requests for the provision of highway disabled parking spaces that is both fair and consistent and is established around specific criteria. It may also choose to publish these criteria online.

9.1.1 Advisory Bays

An advisory parking bay for blue badge holders is normally provided where parking is at a premium in a residential area that is not controlled by waiting restrictions. A resident holding a blue badge, who has satisfied the conditions laid down by the County Borough Council as Highway Authority, may be provided with a parking place on the highway near their home. Such bays are advisory and depend on the goodwill of neighbours and other road users for their success.

Advisory bays are also marked in accordance with the Traffic Signs Regulations and General Directions in that the word "DISABLED" will be written alongside the bay on the road, but they do not have a restriction plate (showing the blue disabled symbol) accompanying them.

Although advisory bays are primarily intended for the use of the original applicant, they cannot be enforced and consequently no action can be taken against anyone else who parks there, whether a blue badge holder or not. However, experience shows that such spaces are normally respected and the original applicant will experience an enhanced lifestyle as a result.

The criteria for the provision of an Advisory Disabled bay should include:

- A bay cannot be provided solely for the use of an individual and is available for the use of any Blue Badge Holder
- To apply for a Parking Bay the applicant must be a blue badge holder
- The applicant must be the driver or regular passenger of the vehicle for which the space is required. The vehicle should be based at their property and the driver also resident.
• A bay should only be provided if there is no off-street parking available at or "near" your property and where there is a known parking issue.
• The Council may determine whether to charge the applicant for the provision of an on-street disabled bay
• The Highway Engineering team must be satisfied as to the feasibility of the provision of a disabled bay, which must not obstruct the free flowing of traffic on the highway, nor cause any worsening in road safety

9.2 On-street provision

The Council provides on-street provision for disabled motorists in two ways:
• Dedicated bays marked for disabled parking only
• Permitted parking on double and single yellow lines

Currently, there are on-street bays in Castle Yard and Swan Street. There is certainly not over-provision of these bays, but visual observation suggests that there is some abuse of these spaces.

9.3 Off-street provision

The main provision for Blue Badge holders in the town is the Swan Street car park. However, all Council off-street car parks have Blue Badge spaces as shown in the table below. This is compliant to recommended 5% Blue Badge provision as a proportion of total parking capacity.

<table>
<thead>
<tr>
<th>Car Park</th>
<th>Standard</th>
<th>Blue Badge</th>
<th>Total</th>
<th>% Blue Badge</th>
</tr>
</thead>
<tbody>
<tr>
<td>Castle Multi-Storey Car Park</td>
<td>251</td>
<td>15</td>
<td>266</td>
<td>5.6%</td>
</tr>
<tr>
<td>Castle Street Car Park</td>
<td>134</td>
<td>8</td>
<td>142</td>
<td>5.6%</td>
</tr>
<tr>
<td>St Tydfil</td>
<td>282</td>
<td>17</td>
<td>299</td>
<td>5.7%</td>
</tr>
<tr>
<td>River Taff</td>
<td>162</td>
<td>7</td>
<td>169</td>
<td>4.1%</td>
</tr>
<tr>
<td>Gilar Street Car Park</td>
<td>76</td>
<td>10</td>
<td>86</td>
<td>11.6%</td>
</tr>
<tr>
<td>Tramroad</td>
<td>24</td>
<td>3</td>
<td>27</td>
<td>11.1%</td>
</tr>
<tr>
<td>Pontmorlais</td>
<td>23</td>
<td>3</td>
<td>26</td>
<td>11.5%</td>
</tr>
<tr>
<td>Swan Street</td>
<td>0</td>
<td>23</td>
<td>23</td>
<td>100.0%</td>
</tr>
<tr>
<td>High Street</td>
<td>25</td>
<td>1</td>
<td>26</td>
<td>3.8%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>977</strong></td>
<td><strong>87</strong></td>
<td><strong>1064</strong></td>
<td><strong>8.2%</strong></td>
</tr>
</tbody>
</table>

Table 48. Blue Badge off-street parking

Some of the Blue Badge spaces provided by the Council do not appear to be compliant to published standards. A separate note has been provided to the Council on this issue.
9.4 Charging

Most Local Authorities provide free parking for Blue Badge holders at off-street car parks. MTCBC is relatively rare in levying charges in its off street car parks. However, there does not appear to be a lobby requesting that Blue Badge parking is made free. Additionally, on-street parking using the Blue Badge on single or double yellow lies is available free of charge to enable effective access to goods and services.

The disabled motoring lobby generally argues for free parking since it considers it likely that it generally takes disabled people longer to fulfil the same public realm functions than those without a disability. Therefore charging for Blue Badge spaces risks being challenged as discriminatory. A potential resolution of this is to permit a longer stay per tariff band for Blue Badge parking, compared to standard parking.

10 Future considerations

10.1 Phone and Pay

During the development of this research, a review was undertaken of the Council’s cashless parking payment service, Phone and Pay, which is provided by Bemrose Booth mobile. There are two contracts in place, one for the provision of the cashless parking service and another for the provision of hand held terminals which the CEOs have to interrogate to see if a cashless parking transaction is in progress.

The Contract is for 10 years, which is an unusually long time for a service of this kind. There was a mutual termination provision without cause in the first 18 months which has now passed. Therefore Bemrose Booth is under Contract to the Council to provide this service for the next 8 years.

Customers register for the service by phone or online and then carry out parking transactions through phone, online, or smartphone app. The provider charges a 10p fee for each transaction, which is currently paid by the customer (but in many other Local Authorities or private car parks the fee is absorbed by the car park operator).

The current situation can be summarised as:

- Very low take up;
- Perception of unreliability;
- Enforcement by the CEOs is cumbersome due to the need to use multiple hand held devices;
- Transactions are limited to daily only (as shown in the screenshot below)

This means that the service is not being exploited to its full potential. There are a number of potential benefits that can be obtained by promoting the service and expanding its provision across a range of Council parking. This should be done in conjunction with a review of the capability of the Council’s ICES Parking Gateway software to determine

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8 [http://www.disabledmotoring.org/campaigns/parking-charges](http://www.disabledmotoring.org/campaigns/parking-charges)
which is the most cost effective and operationally efficient platform for each transaction type. Specifically, the transactions that should be migrated from physical fulfilment to online virtual transactions include:

- All Resident and Visitor Permits
- All season tickets for off-street car parks
- Business or Trader Permits
- Parking expenses incurred by Council staff on duty

Figure 73. Bemrose Booth Phone and Pay screenshot

It is also recommended that the Council should absorb the 20p transaction charge (although not the optional text confirmation and reminder fees). At current usage rates, there would be around 3,700 transactions annually, a cost of £740. Even with a large scale increase the costs to the Council would remain relatively modest.

Additionally, as a priority, the Council should integrate the Phone and Pay system within its Casio handheld terminals used by the CEOs. This will save £2,520 per annum and has been confirmed as being technically straightforward.
10.2 Technology

Technology of one kind or another has been deployed at car parks ever since the first meters and payment terminals, or barrier control systems. However, the current focus of introduction of new technology for parking is:

- To improve the customer experience by
  - Simplifying payment
  - Providing information (e.g. on real time occupancy or availability, location or direction of parking)
  - Flexibility – e.g. remotely extending parking sessions
  - Account management – e.g. VAT receipts online, automatic payment
- To improve compliance and reduce contraventions
- To reduce operational costs

The use of automatic number plate recognition (ANPR) systems has been discussed in Section 8 of this report, which deals with Merthyr Leisure Village. It general use by the Council is not likely to be permissible under the TMA and no further discussion is required here.

![Example VMS](image)

However, the provision of Variable Message Signing may be of considerable value in directing users effectively to the nearest car park. In order to be effective, the Council (and any private parking operators, such as a newly formed MTLV Parking Company) would have to manage the real time occupancy at off-street car parks and potentially on-street.
There are a number of methods of achieving this. A simple pneumatic traffic counter is probably the most cost effective method in the short term. However, some Local Authorities and other car park operators are deploying wireless bay sensors, which aggregate parking data for car parks and highway capacity and disseminate this through an online portal to user devices, including CEOs (to further their role as ambassadors) and customers. Integration with Sat Nav systems is under development, along with integration with parking availability and booking websites such as Parkopedia and Park at My House. It is likely that the declining price point of this type of technology will render it affordable in the next few years.

The excerpt from Figure 75.

Citywide Parking Sensors for Lowering Congestion

Solution by: Smart Parking and Westminster City Council

→ London, UK: By installing parking bay sensors across the city, this solution allows motorists to directly access available parking spaces, reducing congestion, air pollution, and fuel consumption in the process.

Smart Parking Sustainia entry (source: http://www.sustainia.me/solutions)

Smart Cities

Smart Cities is a concept that has emerged as a mixture of government policy and corporate activity. Whilst Merthyr Tydfil is not already a designated Smart City (such as Bristol, Glasgow, Birmingham and Milton Keynes. However, some of the principles will
Future considerations have direct relevance to wider Council objectives. Additionally, it is possible that grant funding may be available as part of a wider approach to encouraging the adoption of communications technology.

Figure 76. Smart City principles

These principles are:

- sustainability
- efficiency
- intelligent management
- integrated ICTs
- active citizen participation

Key Smart Cities themes are expressed in six ‘axes’

- regional competitiveness
- transport and ICT economics
• natural resources
• human and social capital
• quality of life
• participation of citizens

It is worth noting the direct connection between Information and Communications technology and Transport. Discussions around Smart Cities include the potential for deployment of technology that is relevant to the parking sector, such as wireless sensors. Forward looking objectives include a wider network of sensors measuring and reporting on multiple parameters including:

• pollution
• lighting levels
• noise
• temperature

However, most deployment of sensors worldwide is in the management of parking, both on and off street. There is little evidence of integration of any sensor networks with other traffic management systems, however this is likely to be an area of promise, delivering for example:

• Joined up data between local and trunk road networks
• Correlation of traffic movement and parking volumes
• Better use of VMS
• Efficient enforcement of parking restrictions
• Improved traffic flows
• Journey time savings
• Provision of public wireless networks
11 Appendices

11.1 Appendix A Residents Surveys

For Controlled Streets  Address ________________________________

How many cars does your household own (residents only not visitors) __________________

Does your household have a: Residents permit?  Y / N Visitors permit?  Y / N

How often do you use your Visitors permit?
  always □ frequently □ sometimes □ rarely □ never □
  (everyday) (at least weekly) (between weekly and once a month)

Do you have problems finding a space to park in your residents parking zone:
  always □ frequently □ sometimes □ rarely □ never □

If you do have regular problems parking, what do you think might be done about this?

Does your household have access to: the internet □ a smart phone □

Rather than paying for an annual visitors permit, would you rather pay a lower cost for individual visitor sessions by: phone □ online □ smartphone app □

Do you work in Merthyr Tydfil?  Y / N  How do you get to work? __________________

Do you park in Merthyr Tydfil town centre?
  No □ Castle Street □ St Tydfil (College) □ Tesco □

Other  ________________________________________________________

How frequently:
  always □ frequently □ sometimes □ rarely □ never □
  (everyday) (at least weekly) (between weekly and once a month)

Do you have any comments about the residents parking zone or parking in the town centre

________________________________________________________________

________________________________________________________________
If property has an off street parking space tick here

For Uncontrolled Streets  Address ____________________________________________________________________________

How many cars does your household own (residents only not visitors) ________________

Do you have problems finding a space to park in your street:

always  frequently  sometimes  rarely  never
(everyday)  (at least weekly)  (between weekly and once a month)

If you do have regular problems parking, or if parking became a problem in the future, what do you think might be done about this?

Nothing  Restrict parking to residents and visitors  Other  (please list below)

________________________________________________________________________

________________________________________________________________________

Does your household have access to: the internet  a smart phone?

Do you work in Merthyr Tydfil? Y / N  How do you get to work? ________________

Do you park in Merthyr Tydfil town centre?

No  Casile Street  St Tydfil (College)  Tesco

Other  ___________________________________________________________________

How frequently:

always  frequently  sometimes  rarely  never
(everyday)  (at least weekly)  (between weekly and once a month)

Do you have any comments about parking (either in the town or in your local street):

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
11.2 Appendix B: Controlled Streets - Residents Comments

If you do have regular problems parking, what do you think might be done about this?
1 Parking space for each house
1 Permit per household for free
All from the town centre park here so there is no space for the house
Always I cannot find parking especially at nights.
Asda
Better control in the parking zone area
Disgusting
Everyone to only park outside their houses
Everything good
Everything is OK
Everything is OK
Everything is ok
Extra spaces like the original plan was
Few spaces for many cars
Get the markings correct on the road and have wardens visits 24 hours
Has a garage so no problem
Has a garage so no problem
Has private parking
Have a disabled badge so can park anywhere, anybody in Zone B can park anywhere but that is wrong, also the new permits do not have the address on.
Her son has had an unfair parking ticket
Households need more than one visitors permit
I don’t think that the permit works, we are unable to park in the zone often, especially Sunday night
If only residents parked here it would not be a problem
if you have a permit I suggest to be able to give the permit for one hour to a visitor
Individual parking per household
Individual parking per household,
Individual parking per household,
Individual parking per household, ability of householders to put tickets on cars themselves
Lack of disabled parking spaces
Larger parking bays
Lengthening parking spaces
Limit for the space between cars
Limit permits to one per household
Limited cars per household
Many cars without permits
More checks
More disabled parking, 1 free permit per household
More enforcement times
More frequent visits from wardens
More organisation
More parking
More parking
More parking areas
More parking in town
More parking spaces
More parking spaces
More parking spaces
More parking spaces
More parking spaces
More parking spaces
More parking spaces
More parking spaces
More parking spaces
More parking spaces
More parking spaces needed
More parking spaces on the road
More people checking tickets
More permits and traffic wardens after 6pm
More residents parking
More room for the cars
More spaces
More spaces
More spaces fewer permits
More spaces fewer permits
More spaces needed and more patrols by wardens after 6pm and at weekends
More traffic wardens visiting more often, they only come when residents call the police
More wardens
More wardens
More Wardens
More Wardens
More wardens
More wardens 24 hours
More wardens after 6
More wardens after 6pm
More wardens after 6pm
More Wardens after 6pm
More wardens after 6pm because of the pub
More wardens after 6pm or weekends, more notices
More wardens after 6pm and cheaper permits also more permits per household
More wardens and more spaces
More wardens giving tickets
More wardens overnight
More wardens patrolling please
More wardens patrolling please
More wardens to cover at night
More wardens, free parking
Most neighbours have more than 2 cars
Need more visitors permits
No parking spaces here, only in Church St
Not enough spaces, absolute nightmare, 2 different zones
Not Much
Nothing to be done as the cars are more than the spaces
Open one free car park for residents or make parking spaces some days for the residents without paying a permit
Parking bays
Parking bays and lines
Parking is very good
Parking should be only for residents
Parking too expensive
Parking too expensive
Parks in Conservative Club, more wardens more fines
Parks in Gilar St
People are coming from other areas to park here as it is a nice area to park.
People go to the dentist and park in residents permits. More parking for dentist patients
People leave cars overnight
People must park properly as most cars are parked badly
People park on the street
Problem with speeding
Problems with neighbours cars
Put a parking area next to Wetherspoons as all the customers are parking
Residents should be able to report cars with no permits
Should be just residents only
Some houses have no permits, more wardens to check to permit holders
Some neighbours do not have permits
Stop issuing so many permits when they know there are limited spaces
Stop people parking at nights
Stop the pub - most traffic problems after 5
Suggest parking should be free
Take yellow lines away
The cars from Lower Thomas Street park here so there is no parking space. The parking used to be better. The neighbours should have fewer visitors. The Welsh Water take all places and people in the pub. There are parking problems in this area. There is no space after 6pm, more parking wardens after 6pm please. There is not enough room for more than one car. There is not enough space for everyone to park. There is nothing to do. There must be one free permit per household. Please with the increased presence of traffic wardens they are moving house because they cannot park. They block the back street all the time. They don't send wardens after 6pm. This household has private parking. Too expensive. Too many cars for limited spaces, zones should be merged. Town centre free parking, this way the shops will attract more customers. Traffic wardens. Warden system at weekends.

11.3 Appendix C: Uncontrolled Streets - Residents Comments

Uncontrolled streets - residents comments

Send wardens and book whoever is not resident. All the car spaces are full from 9am. All college students are parking their cars in the neighbourhood. College students are parking in the area. College students are parking in the area. Wants permits to be free of charge. They don't have a problem anymore as the Council has created parking spaces for residents near to their houses, but want more patrols as college students are parking all the time in the area. Lower charges for residents permits and then implement it, otherwise do nothing. Students block entrance to drive, put yellow lines, not enough parking. Students park here, not enough parking. Students park here. Students park here.
Students park here
Students park here
Students park here, their parking should be free by the college
Students block my drive. If ambulance needed to come to this area would not have a chance
Students park here, too expensive in town prices are going up. Yellow lines please
Yellow lines
Not enough parking in town
Would pay for residents permit
People park and leave rubbish
Parking is good
Should be free parking in town
People park outside your drive so you can't get in, not enough parking
Students parking here you can't find parking, worse during weekdays
Afraid to park anywhere else than outside house as space will be taken by a student. Yellow lines
Hard to get into off street parking always blocked
Will pay extra to keep students away
Parking good in town
Students park here
Carer for wife, parking too expensive. Students leave rubbish when they park there.
Would pay for own parking to secure space
everything is OK
everything is OK because they park in residents parking area
When people from the college park here we have parking problems
No problems
They have a residents parking area so they don't have problems
Speeding problems, more safety signs and more community support officers needed
Cost to parking in town
£3.50 in town too expensive
Remove double yellow line in front of house
Town is too expensive
No problems
Can't park in my drive as people parking across it.
No problems
Restrict Monday to Friday because of the college
No problems
All of the teachers and students from the college park here.
Restrict parking to residents because of the college parking here
Double yellow lines
No problems
They have all of them private parking areas
No problem generally only sometimes because of college
No problems
No problems
When there is a Rugby Game we have problems
No problems
In the main road they can't pass, cars from the college block the road.
Problems getting in and out of driveway, more wardens
Create private parking in the City Centre for visitors and make free parking spaces for residents
No problems
No real problems
Will only want permits if they are free
Double yellow lines
Doesn't have problems personally but knows there are problems more generally, and suggests having residents permits
The parking problem is mainly during the weekends, the rest of the week there is no problem
The problem is that even if there is a garage for two cars, the college teachers and students are parking in front of the entrance, the neighbourhood needs double yellow lines and more wardens
problems mainly during the weekend
Double yellow lines in front of entrance to off street parking
Double yellow lines in front of entrance to off street parking
Problem is mainly during weekends
More residential parking spaces
Double yellow lines in front of parking entrances
There must be free residential parking
Double yellow lines of permits
too expensive
students park here and block us so we cannot get our car out.
too expensive
expensive in town, park at Tesco to save money
Too many cars here, people park here and walk to town to get free parking.
Don't go to town nothing to do there.
Too expensive
Too expensive
Students park here
Children come to visit - no problem
Taxi driver parks in taxi field
3 hour parking minimum too high since road was built
too expensive, not keen on multi-storey
Phone community police if my drive is blocked. Parking is too expensive
New road complete soon, night cause parking issues if others parking in the street. Hectic sometimes should be more parking
Don't go to town, nothing to see there.
want it to be cheaper
should not be charging in town as it discourages people and the town won't grow
Happy with parking
Stop people parking in front of house stops car pulling out
Too expensive
Too many people park here and walk to town
Not enough space
Too expensive
Students park here they don't want to pay in town
too expensive in town, very busy not enough parking
Need more restricted areas
would pay for a visitors permit for when daughter comes to visit (parks in Aldi with daughter)
doesn't like MSCP people crash
More restricted permits
Too expensive
Not enough restricted area, people who work park here as early as 7.30
it's fine many places to park, would pay for parking to guarantee a space. Uses different town centre depending on where going
because part closure of college, more students and council people parking here, parking too expensive
Too expensive
Too expensive
Don't want to pay for own parking, there is nothing to see in town everyone goes to Cardiff

11.4 Appendix D: Retailers Questionnaire

This questionnaire was posted to 328 businesses in Merthyr Tydfil town centre
Questionnaire about on-street parking in Merthyr Tydfil Town Centre

Dear Town Centre colleague,

Merthyr Tydfil County Borough Council is considering making changes to on-street loading / parking restrictions in the town. We want to ensure that the views of all town centre businesses are heard and taken into account. It would be greatly appreciated if you can complete this short survey, and either post it using the stamped, addressed envelope provided, or return it to The Big Heart of Merthyr Tydfil office at 13 Wheat Sheaf Lane (Monday to Friday, 9am to 1pm). The survey is confidential and will not be given to the Council. Results will be collected together and reported for the whole town. Please return or post the Questionnaire by 1pm on Friday 31 October.

1. Street that your business is in ______________________________________

2. What parking restrictions apply to the street that your business is located in?

   None □   No parking at any time? □   Goods Loading only □
   20 minutes no return within one hour □   30 minutes free, no return within two hours □
   Disabled parking only □   Other □ (please describe below)

3. At what time(s) do you usually load and unload items required for your business?

   Before 07.00 07.00 - 09.00 09.00 - 11.00 11.00 - 15.00 15.00 - 17.00 after 17.00 □ □ □ □ □ □

4. What type of vehicle do you (or your suppliers / deliveries) use to load and unload for your business?

   A goods vehicle (see definition circle all categories that apply) □   N1 □ N2 □ N3 □
   A private light goods vehicle (i.e. a normal car) □
   I am not sure of my vehicle category □

**Definition:** a goods vehicle is categorised as being designed and constructed for the carriage of goods and having a maximum mass not exceeding 3.5 tonnes (N1), not exceeding 12 tonnes (N2) or exceeding 12 tonnes (N3).
5. Would you support the re-designation of goods loading only bays in the town centre for:

- 20 minute short stay parking
- Dual use short stay parking and loading
- Keep restrictions as they are
- Other change (please describe below)

6. How many people do you employ?

- 1 to 3
- 4 to 10
- 11 to 20
- 21 to 30
- More than 30

7. What percentage of your staff drive to work approximately?

- None
- 25%
- 50%
- 75%
- All

8. If they drive to work, where do they park?

- An uncontrolled street
- Castle Street car park
- St Tydfil (College) car park
- Other Council car park
- Other off-street parking
- Other (please describe below)

9. Do you have any other comments about parking in the town?
Appendix E: Retailers Comments

Access to Wheatsheaf Lane at any time for collection of goods would help businesses also the dropping off of disabled customers throughout Wheatsheaf and Victoria Street. Allow restricted loading

As a building owner and occupier parking permits should be made available to use residents parking during office hours. The streets surrounding our building are empty but we are unable to park there.

candidates to the driving theory test centre have complained about traffic regime and change in road layout.

Car park prices too high, detracls custom from town centre
Car parking charges are ridiculous, very limited car parks
Car parking should be at a reduced rate for traders
Charges too high, keeps people from coming to town, when you can park for less or free in other towns and shopping centres

Church Street has many businesses in the area and whilst residents have permits to park on local streets, business people do not. Guess what? Residents are out at work during office hours and don’t need parking space - we do!

Council car parks have a minimum stay of 3 hours, this would need to be reduced to allow customers to be able to pay for the time they require, at times customers will only need up to half an hour stay. 3 hour tariff discourages customers and businesses. 1 hour tariff please.

Due to having a small business and not being able to turn right to the car park, my shop is a lot quieter. When I do have people parked in bays the traffic wardens are all over them which scares them off

Far too expensive to park in this town (Ebbw Vale, Pontypool are free) if parking was free for 1 to 2 hours, than the town would improve for business
Free parking all year round would be amazing. Beacons Place open after 6 would be good for those parking in Tesco at the end of the day
Free parking at weekends could help boost local business and improve footfall through the town.

Free parking same as Cyfartha Retail park, this is why the High Street is dying

Goods yard at the rear of St Tydfil shopping centre, loading into the High Street is a nightmare to get deliveries in with cars parked by the public and others.
If business users could park in resident areas mostly fre for most of the day, that would help
In Pontmorlais the pavements are much wider than necessary, diagonal parking could greatly increase the number of spaces.
It is a huge problem at the moment and parking is very difficult
It is far too expensive and not very central to the shops. Prices charged you would expect better quality shops, look at Cwmbran, better shops and free parking = more people.
It should be free – it’s too expensive
More free parking encourages shoppers
More security cameras need or supervision in car parks

More spaces required, we have lost many due to new college layout, it is killing town

My business operates from the Beacons Place arcade, we do not have any designated loading or parking for deliveries as we are next to Barclays bank, a loading area would be abused by all. A permit loading system would benefit all retailers.

My staff and I use the college car park during working hours. I am disappointed that you do not cater for staff in the town. Full time staff are forced to pay £84 per month to park just for coming to work (£3.50 a day) it's a shame you don't have parking passes free or even discounted parking fees for those who rely on using the car parks as many others do.

My staff use free parking at MTLV, I think free car parking should be provided for workers, they are prepared to walk a certain distance. Parking closer to the centre preferably free but if chargeable must be reasonable, because otherwise you push people to the retail park.

Need free parking for people who work in local businesses

No, the Council will do what they want anyway. I hope this survey / questionnaire wasn't paid for.

not enough free parking for businesses

only change on-street restrictions after consulting with TCP / BID / PACT. The whole street parking strategy in the town centre needs to be changed with an input by businesses having their say on decisions and public safety to the fore. It’s definitely not working at the moment.

Our particular problem arises when weddings and funerals take place in St Davids Church. The LA felt unable to put a layby in front of the church, this lack can cause congestion and delay when a bride arrives for a wedding or a hearse for a funeral. Currently, restrictions and parking regulations seem more honoured in the breech than the observance in the Red House and south-western extremity of St Davids church.

Parking availability is better than it has ever been but charges are high.

Parking charges are too expensive

Parking in residents only bays should be allowed between 9-5 as they do in other areas.

Parking is good, but prices need to be competitive in Castle and College in order for people to park, otherwise they will continue to park in areas they shouldn't, or in Tesco

Parking is only 20 minutes outside shop, however certain businesses and vehicles are favoured by traffic wardens and allowed to park all day which is ridiculous. Stay times should be enforced to all vehicles as it prevents delivery drivers parking outside shop.

Parking needs be made cheaper and more central for staff and car park entrances need to be made wider for goods

Parking should be free to attract more customers to the town centre
Plans to introduce car parking charges at MTLV concerns us greatly. Cost of living already being high, adding almost £70 per month to my expenses would create a huge problem for staff. Please encourage the Council to either abandon this idea, subsidise employee parking or provide details of what free parking all day actually exists.

Put the prices down, more people would then shop in town.

Reduce parking fees for businesses within the town centre and / or designated staff parking areas in town centre car parks.

Restrictions should be monitored everyday not just certain days. At the moment, only ever see them Mondays and Fridays.

Staff would drive to work if car park charges were lower.

The disabled spaces at our location provide little help to the disabled as they are located too far away from the town centre

The parking should be free to get shoppers back to the town as it's in decline.

The town centre needs free parking for a short period of 2 hours, at all its car parks to compete with the retail park.

There is not enough adequate parking for permit holders on Tramroad Car Par which results in Permit holders using other paid parking.

There should be allocated spaces for business at reduced rates, we have had parking tickets in Swan Street because we parked in the goods only loading bay to unload with a private car.

There should be as much short stay parking in MT town centre as possible. The taxi rank on Victoria St is too big, taxis park around the block in the loading bays. Merthyr should be de-pedestrianised, one way traffic, wide pavements and parking all through the town. Why not make it easy to visit Merthyr.

There should be cheaper alternative options available for staff members.

There should be some free parking if only for the first 2 hours in town.

They charge too much for parking when the retail park is free. It is just another way for this council to ruin our town centre. They have made it very hard for cars to come into the town centre but easier for the retail park.

They could make it more affordable for employees to park as it is far too expensive at the moment.

To be on a par with the Retail park we need more free parking for shoppers.

Too expensive for workers to pay every day for car park spaces.

very difficult to park near the office. We are an estate agent and have to drop off keys and money. We do sometimes need short stay car parking which we do not have we would all benefit from more free parking on weekends or for free events.

we would have grave concerns if the 20 minute short stay parking was removed.

However, there also needs to be better management of contraventions, in particular the loading bays as on a regular basis having goods vehicles block the roads as other vehicles are in the loading bays.

We would like our customers to be able to park outside in Glebeland Street for a short time to be able to pick up or drop off keys etc.
Where our business is situated there is a layby for loading only, it is difficult to park even for 5 minutes to drop off keys to our office as we risk getting a parking ticket.

Why are HGVs and LGV vans allowed to park in John Street for undesignated time periods yet my vehicles and staff get reprimanded for the same thing? In short- why one rule for one and one for another? Also, why is access to a central post office restricted? Disabled persons are expected to park at least 250m away from the entrance as no vehicle is allowed to drive down John Street without a permit. To gain a permit you must have off road parking.

With the renovations being done at the top end of town, parking bays are being filled by skips etc so our parking is being reduced at the moment. Short stay is fine, but 30 minutes would be better than 20 minutes.

Would be helpful to park opposite the church for short term dropping off and loading.

Yes, myself colleagues and customers find it very difficult to park in town. Free parking would be great for myself and for customers.

You are ruining the town with one way systems, lack of short stay parking and parking charges.