SCPR Issues and Opportunities

Report 1 of 2

Executive Summary

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AECOM has been commissioned by Aberdeen City Council (ACC) to undertake a strategic car parking review (SCPR) for Aberdeen City. The aim of the study is to *undertake a review of strategic car parking across the City to consider the complex relationship of parking in the City centre with the City's economic, social and environmental wellbeing and how well the current provision of on and off-street parking (whether operated by the public or private sector) fits with ACC's strategic transport and land use plans.*

The proposed objectives of the SCPR are:

1. A car parking policy for Aberdeen that advocates appropriate use of parking in the City centre, with parking prioritised for short stay shoppers and visitors rather than long stay commuters, and which complements wider transport and economic policies of ACC.
2. A car parking policy for Aberdeen that aligns with the developing Roads Hierarchy[1] and facilitates routeing to appropriate car parks in the City centre through the use of technology.
3. Provide high quality car parking that is accessible to all users and is inclusive of their needs.
4. Provide flexible parking provision which can adapt to suit events and occasions of demand occurrences.
5. A car parking policy for Aberdeen that supports a reduction in traffic in line with various policies for changing the modal split of access into the City centre and increasing the mode share of those using collective transport, walking and cycling within the City centre.
6. A car parking policy for Aberdeen that complements a wider suite of demand management measures promoted by ACC.
7. A car parking policy for Aberdeen that helps to promote City centre living, realising opportunities to enhance public realm and the walkability and liveability of Aberdeen City centre.
8. Examine the establishment of a sustainable business model for parking assets.
9. Establish and maintain a framework for the continued management of (ACC managed) residents' on-street and off-street parking requirements in Aberdeen City.

The objectives will be finalised based on the outcomes of the context setting.

In order to meet the SCPR aim and objectives it is recognised by the SCPR Project Group, which comprises of representatives of ACC, AECOM and the North East of Scotland Transport Partnership (Nestrans), that a change is needed.

This Issues and Opportunities Report (**Report 1 of 2**) details the context setting of the SCPR. The focus of the Report is to determine issues and opportunities relating to the SCPR aim and objectives which will in turn provide the evidence base for the identification of recommendations going forward. **Report 2 of 2** details such recommendations which will be used to inform ACC's Car Parking Action Plan (to be developed by others), which will set the future direction for car parking across the City. Another outcome of the SCPR is to provide recommendations for ACC publicly available off-street car parks to ensure they are fit for purpose and of the quality required by customers. This information has already been shared with the ACC.

Methodology

The study area for the SCPR is focussed on Aberdeen City centre as this is where parking demand is highest and where supply is constrained. The study area does however also extend to consider parking opportunities out-with the City centre for example relating to bus and rail based Park & Ride and on-street parking in the form of existing and possible future Controlled Parking Zones (CPZs).

An extensive list of literature and data sources has been reviewed as part of the SCPR. Sources have been supplemented by information provided by ACC / SCPR stakeholders, outcomes of the SCPR engagement process, site visits undertaken by AECOM, car parking surveys commissioned by AECOM and desk top reviews of other relevant sources.

A high-level benchmarking exercise has been undertaken with the following cities: Newcastle, Dundee and Glasgow. Benchmarking considers key transferrable themes, for example relating to parking standards or parking

[1] *ACC, Roads Hierarchy Study, 2016*

tariffs. Benchmarking cities were agreed with the Project Group for the following key reasons: Dundee being the closest city to Aberdeen, Glasgow as the largest Scottish city and Newcastle due to recent changes to the management of car parking to enhance the city's economic wellbeing.

The scope and methodology of the SCPR has been agreed with the Project Group. Where the scope of the SCPR does not extend to cover topics and parking types which support and complement the SCPR aim and objectives, or where existing information may not be available, actions to consider such elements are addressed in **Report 2 of 2**.

Transport and Land Use Context

Aberdeen City and Aberdeenshire continue to be places in which people want to live and work, with population and economic activity increasing across the region in excess of the Scottish average. The general transport characteristics of the City and Shire are dominated by high car ownership and a high percentage of commuting journeys into the City made by car. For example, approximately 82% of trips to the City for work or study are made by car from the Aberdeenshire area. The Local Development Plans (LDPs) for both the City and Shire, along with other land uses, allocate almost 23,000 new homes up until 2026.

This increasing economically active population places demands on the transport resource including parking. Over the last five years, traffic growth on key city routes has increased by 3% and like many other cities; Aberdeen suffers from peak hour traffic congestion. Traffic modelling demonstrates that at present there is a high volume of traffic which traverses the City centre. A contributing factor to noise levels and air quality is road traffic and in Aberdeen there are 20 Candidate Noise Management Areas (CNMAs) and three Air Quality Management Areas (AQMAs), one of which covers all key City centre routes.

Significant investment has and continues to be made in transport across the City and Shire including the soon-to-be-opened Aberdeen Western Peripheral Route (AWPR) which is expected to fundamentally change driving behaviour and routing patterns. Other key transport interventions include the recently opened Craibstone Park & Ride, the Diamond Bridge, new link road to Aberdeen International Airport, the redoubling of the Aberdeen to Inverurie rail line (currently under construction) and a new railway station at Kintore. Moreover, ACC acknowledges that there is a requirement for a transformational change in the City centre and thus the Aberdeen City Centre Masterplan (CCMP) was approved in 2015. The CCMP identifies distinct interventions over a 25 year period which will have impacts on how people and traffic function and interact with the City's physical environment including changes to car parking. Moreover, in order to deliver CCMP interventions, an overall reduction of 20% in traffic is required. The SCPR has therefore been produced as a supporting document to the CCMP, to identify possible car parking interventions for delivery in support of the CCMP and looking at the implications of these. The SCPR supports and complements the Civitas PORTIS project which seeks to improve access in port cities, of which Aberdeen is a partner city.

The Roads Hierarchy Strategy, which is the subject of a separate study recently commissioned by Nestrans and ACC seeks to define how the transport network will function post opening of the AWPR by providing the framework to make the city a destination as opposed to a through route, this is supported by the AWPR Signage Review, which seeks to create three zones in the City (North, West and South) to reduce cross city movements.

The context setting for the SCPR demonstrates that although major transport interventions across the City and Shire are well underway, current and future travel behaviours will continue to place demands on the transport resource and parking. It is therefore necessary to recognise the sustainability of the balance in these demands recognising that parking is just one of many elements of Travel Demand Management (TDM).

Parking Policy and Guidance

The policy context for parking is derived from Scottish Planning Policy (SPP) and through the LDP and supporting supplementary guidance. This context focusses on how parking fits within the suite of other TDM measures, car parking standards for new developments and where LDP allocations may influence and impact the demand and supply of car parking. The Aberdeen LDP also sets out policies relating to a presumption against developments which would have detrimental impacts on noise and air quality while considering the levels of such impacts in accordance with EU Directives and national legislation.

SPP and the Aberdeen and Aberdeenshire LDPs all place an emphasis on sustainable land use planning which maximises and supports sustainable travel and accessibility by emphasising walking, cycling and public transport as a priority. An element of this hierarchy is a restriction on the availability of car parking achieved through the application of car parking standards. Aberdeen has comparatively very generous parking standards for new

developments especially in the City centre when compared to the other benchmarked cities; in particular office parking provision is three times higher than the Glasgow standard. Aberdeen does however have guidance associated with low or no car developments, parking standards for electric vehicles (EVs) and a developer contribution mechanism for Car Clubs.

Unlike Newcastle and Dundee, Aberdeen does not have any exclusive parking related policies, other than parking standards. These policies are generally very restrictive of new public parking within their City centres. Moreover the current policy context does not align with the Roads Hierarchy Strategy.

There are a number of opportunity sites identified within the Aberdeen LDP. These include Park & Ride improvements at Bridge of Don, an expanded parking facility at Dyce Railway Station and a redevelopment of the Denburn Car Park.

What is the current strategy in relation to car parking?

There is a general acknowledgement within existing strategies, such as the Regional and Local Transport Strategies, that managing car parking demand appropriately can positively influence mode choice, increase sustainable transport use and support the local economy.

The strategies generally promote greater use of bus and rail Park & Ride sites and emphasise the need to increase patronage on these services.

The CCMP provides a 25 year strategy for the City centre which aspires to revitalise and energise a series of development areas, emphasising the requirement to reduce car use within the City centre core in favour of more sustainable modes.

As previously noted the Roads Hierarchy Strategy, which is being developed to, among other things, support the delivery of the CCMP reinforces the City Centre as a destination, not a through route. The Strategy also provides a framework to support access to car parks within the City centre so as to appropriately manage routing from the AWPR and limit cross City centre vehicular movements.

The Aberdeen Air Quality Action Plan aspires to eliminate the need for AQMAs and includes a series of actions to achieve this including promoting modal shift away from car use and making new development parking standards stricter.

What are the current Parking Characteristics?

Park & Ride

Park & Ride provision serving Aberdeen consists of approximately 3,200 spaces. 80% of these spaces are served by bus with the remaining 20% being served by rail from peripheral stations. The bus based Park & Ride sites are situated to the north and west of the City and are generally well appointed with good quality facilities. The cost of Park & Ride for travel to Aberdeen City centre varies from £3 to £20 a day (return) depending on mode choice and location. Considering the benchmarking cities, Park & Ride serving Aberdeen is on average more expensive.

Park & Ride sites serving Aberdeen have more parking spaces compared to two of the three benchmarked cities, with only Glasgow having more overall spaces. Usage statistics collected by Nestrans in the weekday periods indicate that, generally speaking, the rail based Park & Ride facilities are notably overcapacity whilst there is a notable shortfall in demand at the bus based facilities.

Potential exists for an additional 349 bus based Park & Ride spaces in the north of the city (Bridge of Don planning consent for up to 999 spaces), while there remains a regional aspiration to deliver a further bus-based Park and Ride site south of the city on the A90 trunk road (T) at Portlethen. The locations of the existing Park & Ride sites are considered to be favourable in relation to the AWPR and there is available capacity to accommodate increased demands.

ACC Off-Street Car Parks

Ten ACC publicly available off-street car parks are included in the SCPR. All but one of these car parks (Jack's Brae) is situated within the City centre:

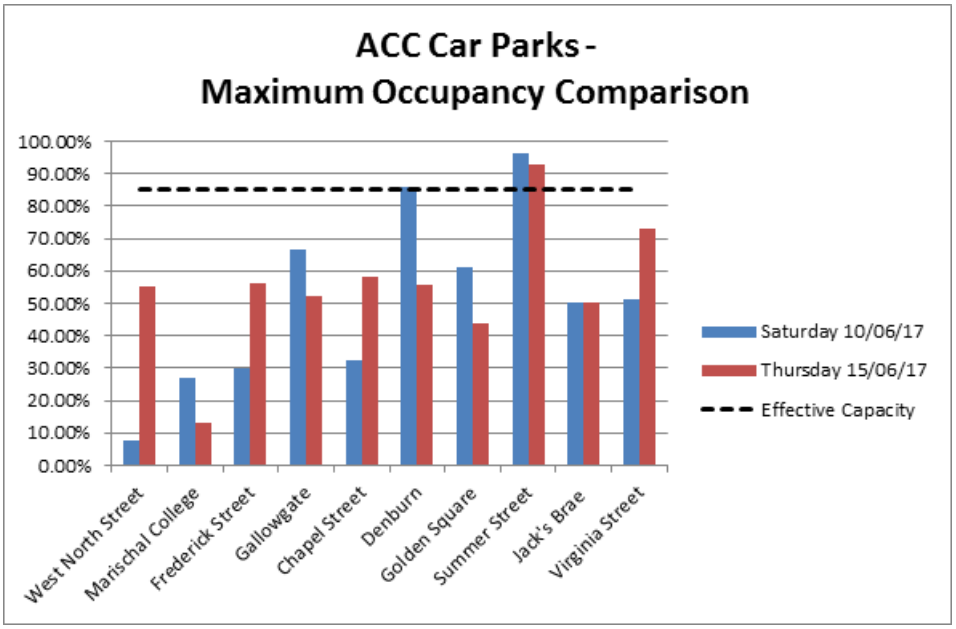
1. West North Street (North)
2. Marischal College (North)

3. Frederick Street (North)
4. Gallowgate (North)
5. Chapel Street (West)
6. Denburn (West)
7. Golden Square (West)
8. Summer Street (West)
9. Jack's Brae (West)
10. Virginia Street (South)

These car parks have a combined capacity of 1,526 parking spaces and include multi-storey car parks (MSCP) and surface car parks. These car parks cater for a mix of parking demands including for general Pay & Display parking, cashless parking using the RingGo app and parking permit holders including ACC staff. In 2016 / 2017 revenue generated by the ten car parks was approximately £2.8m which is a reduction of approximately £300,000 compared to 2015 / 2016.

Four of the car parks are designated as 'long stay' (Denburn, Chapel Street, Virginia Street and West North Street), with Frederick Street operating as both long and short stay. The rest are designated as short stay. Opening hours are fairly consistent across car parks with no barriers in operation and parking charges remain at roughly £1 per hour with little variance from this pattern for longer stays. As a comparison with the benchmarking cities, considering short stay parking, Aberdeen has the cheapest average parking cost. For long stay parking, the average price in Aberdeen is slightly higher than Dundee but considerably cheaper than Glasgow.

A review of the maximum occupancy of the car parks for a weekday and Saturday is shown in the following figure. A car park is considered to be operating within effective capacity at or less than 85%, the remaining 15% caters for circulatory traffic thus ensuring efficiencies in how the car park operates. The figure shows that Summer Street is operating over effective capacity with all other car parks operating within effective capacity. Some car parks have comparably low occupancy rates, especially at the weekend.



An audit of the quality of these car parks was undertaken by AECOM with consideration to: accessibility, signage, lighting, cleanliness and general quality. The average rating was 3.6/5 with the lowest rating 2.5 for the Denburn MSCP. This information has been shared with ACC to inform future asset management plans.

Private Off-Street Car Parks

There are a total of seven privately owned yet publicly available off-street car parks located within Aberdeen City centre, comprising a total of 3,992 spaces. Five of these car parks are operated by three of the large shopping

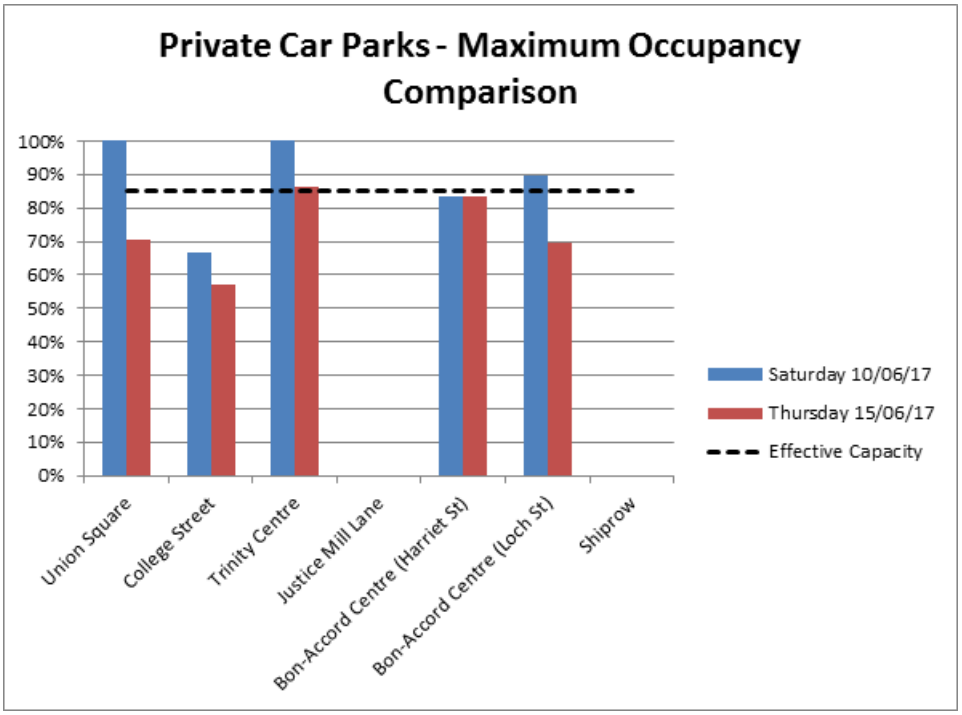
centres, a section of the College Street car park is operated by ScotRail whilst the remaining two car parks operate on a standalone basis:

1. Union Square (South)
2. College Street for Union Square and Aberdeen Railway Station (West)
3. Trinity Centre (North)
4. Justice Mill Lane (West)
5. Harriet Street (West)
6. Loch Street (North)
7. Shiprow (South)

There is a large contrast in the tariffs applied across the car parks with those standalone car parks generally offering much cheaper longer-term parking aimed at attracting commuters compared to the shopping centre affiliated car parks. The privately-owned car parks are generally of high quality, with five of the car parks having been awarded Park Mark status.

In terms of usage, the car parks operated by the shopping centres are generally at or near capacity on Saturday afternoons, with the exception of the College Street car park. The standalone car parks are only around 35% - 50% full on Saturdays as shown in the following figure. No quantitative information was made available for the Shiprow and Justice Mill Lane car parks however anecdotal information from the operators of these car parks demonstrates the following occupancy characteristics:

- Justice Mill Lane – Car park occupancy for the weekday is generally around 90%, car park occupancy at the weekend is approximately 40%; and
- Shiprow – Weekday occupancy rates generally peak at 50%, at the weekend the peak occupancy is 35%.



Private Car Parks

There are a total of 909 off-street car parking spaces that are available at ACC Housing Revenue Account (HRA) car parks located at 40 different sites. These are predominantly located in the City centre study area but there also some located out with this area.

Anecdotal evidence provided by ACC staff suggests that that there are high levels of indiscriminate parking issues at the various HRA car parks. The data suggests that there are 276 spaces located at HRA car parks that no lease has been 'let' for. Some car parks have very low occupancy rates.

HRA parking permits vary in price depending on the type of space and location and range from £4 to £20 a week; note higher prices are applicable to non-tenants.

There are also a significant number of additional private off-street car parks associated with residential and commercial land uses in the City centre. In particular the North Dee, Holburn and King Street areas have a higher density of such parking.

On-Street Parking

CPZs are managed by ACC and are done so through a permit / voucher based system, Pay & Display or cashless payments. Aberdeen currently has 21 defined CPZs and four possible CPZs.

CPZs were first introduced in the City to provide turnover of parking for commercial businesses and increased opportunity for residents to find a parking space close to their home. As parking pressures from commuter parking extended further out from the City centre, controlled parking was introduced more widely to actively manage traffic with a principle aim to reduce congestion and delay whilst improving the local environment and amenity.

There are approximately 11,973 on-street car parking spaces within the existing CPZs, approximately 3,900 of these spaces reside within the 'central' area of the City. In 2016, over 16,000 permits were issued. On-street parking maximum duration of stay varies with the 'central' area of the City restricted to between 1 and 2 hours increasing to 3 hours in the peripheral areas. Those with parking permits may exceed the maximum duration of stay.

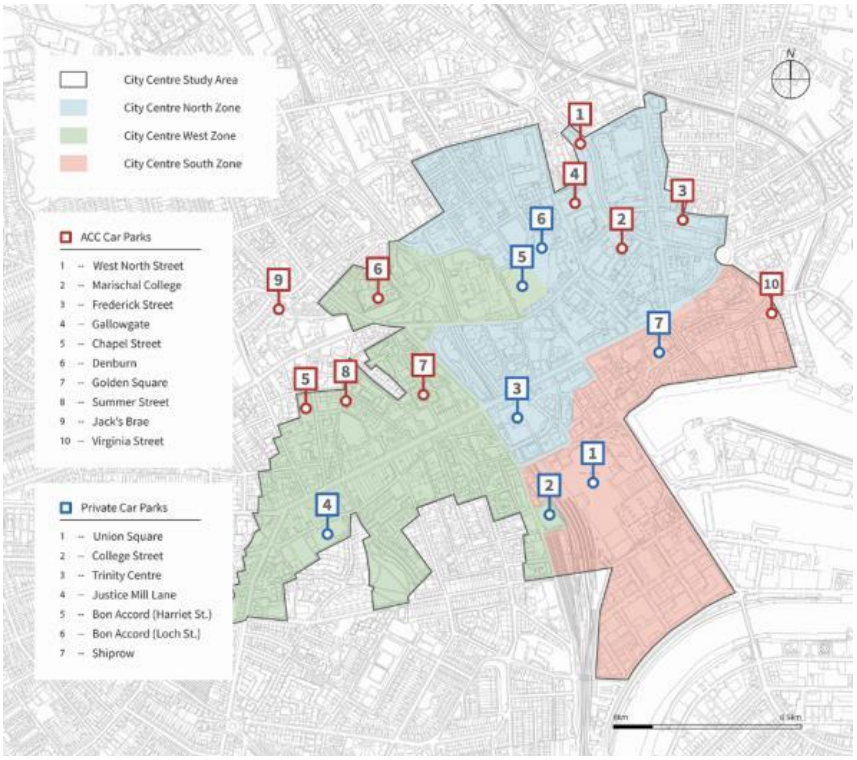
The yearly cost of a parking permit is £50, £500 and £550 for residents, business and contractor permits respectively. The hours of operation vary across the City.

In 2016, revenue from on-street parking (including parking related penalty charge notices) exceeded £6.6m; the greatest proportion of this revenue was from Pay & Display / cashless parking.

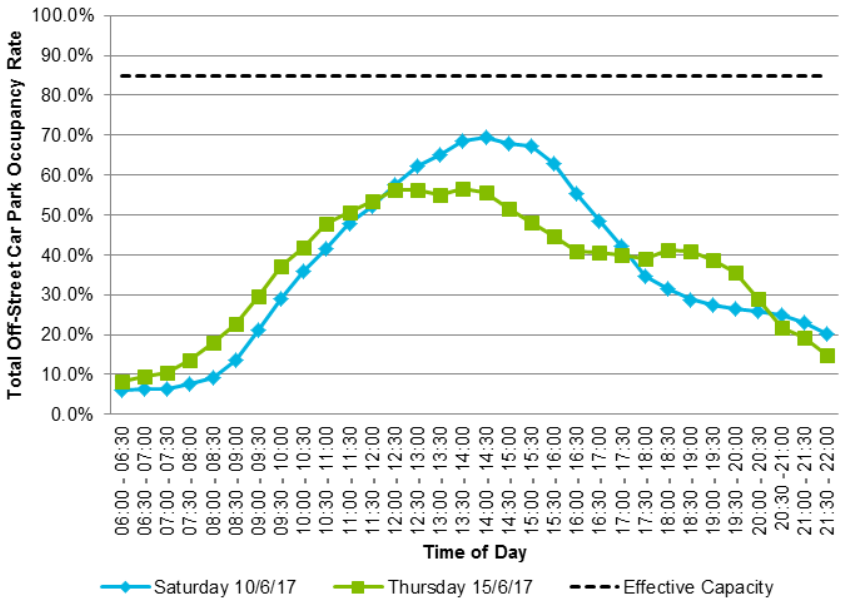
Unlike the other benchmarking cities, Aberdeen does not adopt a tariff-based structure for permits based on location instead providing a flat tariff structure. In respect of residential permits, out-with the City centre, the Aberdeen tariff is comparable with the benchmarking cities, however in respect of City centre parking residential and business tariffs are considerably lower in Aberdeen compared to the other cities. Moreover, unlike Glasgow which does not permit the sale of on-street parking permits for business use in the City centre, Aberdeen does.

Is there sufficient off-street parking in Aberdeen?

The following figure shows City centre off-street car parks and their respective 'zone' location. The occupancy levels for all off-street car parks is shown in the figure thereafter, this figure includes the combined capacity of all off-street car parks which is 5,518 spaces and the demand for these spaces for a weekday and weekend.

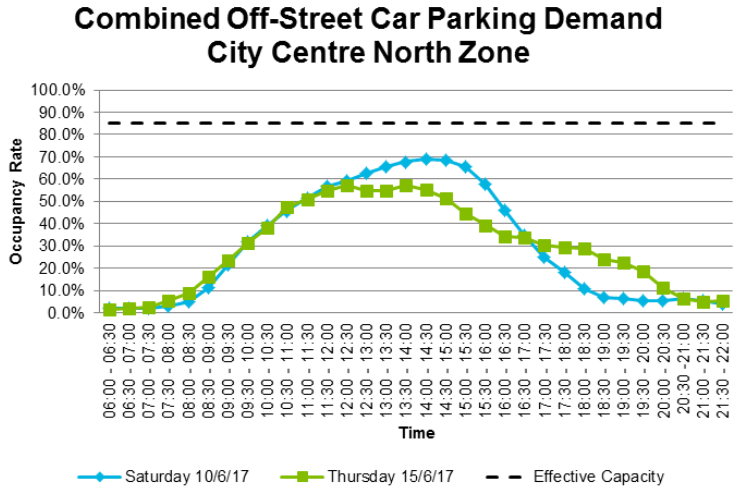


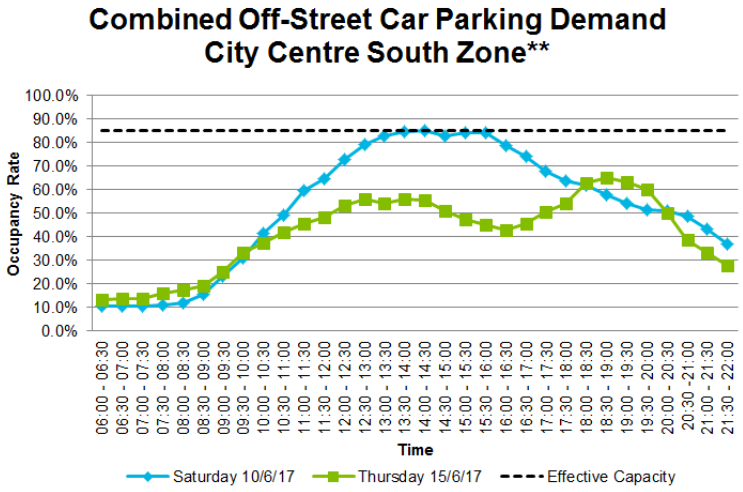
Combined City Centre Off-Street Publically Available Car Park Occupancy Rate**



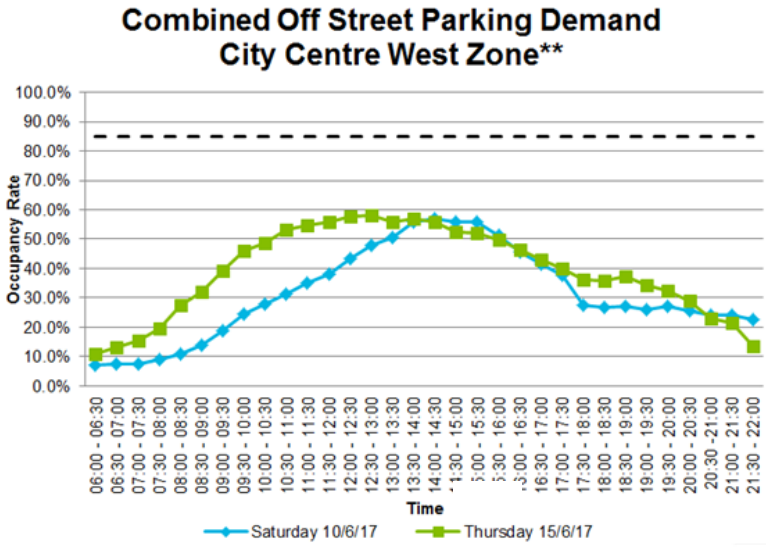
***Includes **worst case anecdotal information** provided by the operators of Shiprow and Justice Mill Lane Car Parks .*

The above figure illustrates that when considering off-street total capacity and demand Aberdeen car parks are collectively operating within effective capacity (at or less than 85%). It is however recognised that is important to understand how car parks are operating within the respective zones of the City and this is shown in the following figures.





***Includes Shiprow Car Park using **worst case anecdotal information provided by operator**. This assumes a uniform occupancy rate of 35% on Saturday 10/06/17 and 50% on Thursday 15/06/17.*



***Includes Justice Mill Lane Car Park using **worst case anecdotal information provided by operator**. This assumes a uniform occupancy rate of 40% on Saturday 10/06/17 and 90% on Thursday 15/06/17.*

These figures demonstrate that considering combined capacity and demand within each zone, publicly available off-street car parks are operating within effective capacity. Within the south zone, demand does however encroach on effective capacity at the weekend. The west zone in particular is shown to be operating with significant residual capacity during the week and weekend. Based on existing demands and driver behaviour, considering the zones of the city, car parks are appropriately located.

EVs and Car Clubs

The total number of EV bays in the City centre (implemented by ACC) constitutes 26 spaces, additional spaces are provided in private car parks. Of these spaces, only seven are available for public use with the remainder either available for the Car Club or fleet vehicles. It is recognised that EV provision in the City will be required to change and the existing provision provides the platform for growth.

The Co-wheels Car Club offer TDM solutions to provide alternatives to private ownership of a vehicle and to help alleviate the issues relating to car parking including competition for space and environmental problems. The Car Club currently has a fleet of 33 vehicles dispersed across 27 sites in and around Aberdeen City. A single car club vehicle in Aberdeen has been shown to replace seventeen cars, five from people giving them up and twelve choosing not to replace them when the time comes, thus helping to reduce parking pressure as well as improve mobility.

Engagement and Technology

A detailed and targeted methodology for public and stakeholder engagement formed a central component of the SCPR. These engagement techniques have been applied to gain a thorough understanding of the principal issues and opportunities relating to car parking in Aberdeen, and provide the context for the SCPR. Engagement included: stakeholder workshops and an online public survey. The outcomes of the engagement will be used to inform SCPR recommendations.

The Issues and Opportunities review indicates that monitoring and dissemination elements of parking provision are tracking in the right direction, with the delivery of a new Urban Traffic Management & Control (UTMC) system. However, it is recognised that the payment / enforcement system needs a significant refresh. This refresh needs to consider the operational requirements to enhance operational effectiveness and revenue generation of the current system. Technology related recommendations are considered in the next steps of the SCPR study.

Key Findings and Next Steps

An increasing and economically active population places demands on the transport resource, including for parking and like many other cities, road traffic with resultant impacts on noise and air quality, is increasing in Aberdeen and key road links and junctions suffer from peak hour congestion.
A series of transport interventions are due to be open / are committed which will change how people and traffic moves to / from and within Aberdeen City centre.
Change is needed to parking, as part of a package of wider TDM measures to support and deliver policy, guidance and strategy objectives for the City including consideration to the CCMP and Roads Hierarchy Strategy.
Current policy and guidance does not align with strategy objectives for the City and in comparison to benchmarking cities parking standards in Aberdeen for new developments are very generous.
Existing bus based Park & Ride facilities which serve Aberdeen are underutilised, in comparison to the benchmarking cities, Park & Ride travel is on average more expensive in Aberdeen.
There are 1,526 off-street publicly available car parking spaces within ten car parks operated by ACC in the City centre. These car parks are generally operating within effective capacity (at or less than 85% occupancy). Parking tariffs for short stay parking in Aberdeen are cheaper than the benchmarking cities.
Private off-street publicly available car parking spaces total 3,992 spaces over seven car parks. Car parks serving shopping centres are operating at or over effective capacity at the weekends. Weekdays operate within effective capacity.
Considering the combined capacity and demand for ACC and private off-street parking, existing car parks are operating within effective capacity. Off-street car parks in the south of the City do however exceed effective capacity at the weekends, while car parks in the north and west are shown to have residual capacity during the week and weekend. Based on existing demands it is considered that there is sufficient off-street parking in the appropriate locations, however management of this car parking is needed to direct drivers to under-utilised spaces.
Parking permits for on-street parking in Aberdeen City centre are considerably cheaper than benchmarking cities, moreover parking permits for commuter based parking by non HRA tenants are available to purchase thus facilitating long stay parking.

This report details the context to understand issues and opportunities in respect of the SCPR aim and objectives which in turn have been used to inform a series of recommendations which are included in **Report 2 of 2.**

Note: This executive summary is based on a baseline review finalised in August 2017, thus changes may have occurred in the intervening period.