

Report of: The Asset Management Group

Subject: Review of PCNPA Car Park Season Ticket offer in advance of the 2027 Season

Decision Required: Yes

Recommendation:

The Authority is recommended to approve:

- a. The continuation of the existing season Single and All site permit types
- b. An increase in the 'Single site' price point to £100
- c. That the 'All Sites' price point remains unchanged at £140

1. Key Messages

To review the Authorities current car park season ticket price points in readiness for the commencement of advance 2027 yr season ticket sales later this autumn.

2. Background

- 2.1 The Authority operates 14 no. charging car parks. From the start of the 2017 charging season we have offered the public 2 no. season ticket types. These season tickets are available to all with no qualifying criteria or limit on numbers issued. One ticket type is valid for use at any of our car parks whilst the other is limited to use at a single nominated location only.
- 2.2 The benefit of both types is the entitlement for a single motor vehicle displaying the season ticket to occupy a single parking space, conditional upon there being available capacity within the car park.
- 2.3 The current price point of our season ticket offer is:
 - Single nominated car park all season: £50 effective from March 2023 (previously £25 effective from March 2017)
 - All car parks all season: £140 effective from March 2023 (previously £70 effective from March 2017)
- 2.4 Since our current season ticket offer was introduced in 2017 it has been well received by the motoring public with tickets being available for purchase from early December well in advance of the start of the charging season (1st March) and remaining available for purchase throughout the charging season ending 31st October.

2.5 To the individual concerned, the cost/benefit which influences their own season ticket purchasing decision will be unique, albeit informed by the fact that we place no limitation on:

- the frequency of a tickets use
- the duration of a tickets use
- the transferability of the ticket between users
- the transferability of the ticket between vehicles

2.6 This means that our season ticket offer is positioned to place no unreasonable constraints on the reasonable parking requirement of the reasonable motorist.

2.7 Although tickets can be purchased over the phone or in person at our Llanion HQ and Oriel Y Parc sites, the vast majority are ordered via our online web shop with the processing and dispatching of those orders being undertaken by our Llanion HQ based customer services team.

2.8 The overall volume of season ticket sales both pre and post the 2023 price increase have remained consistent at circa 1,300 per annum. This suggests a mature market with an illustrative example of the most recent (2025) season ticket purchasing activity summarised in the tables below.

Period of Purchase during 2025	Approx Percentage of Total Annual Sales during the period
In advance of charging season (1st March)	49.5%
Start of charging season to end of March	31.5%
April	8.3%
May	4.2%
June	2.6%
July	3.0%
August	0.6%
September	0.2%
October through to end of season (31st October)	0.1%

Ticket Type	Approx Number of 2025 Season Tickets issued	Car Park Capacity
All sites All season (£140)	207	N/A
Single site only All season (£50)	(See below)	N/A
Saundersfoot	323	116
Poppit Sands	213	280
Little Haven	172	98
OYP St Davids	129	260
Freshwater East	119	204
Amroth	112	94
Solva	39	106

Newport Sands	30	163
Newgale	28	161
West Angle	22	165
Penally	22	35
Broadhaven	14	173
Manorbier	8	158
Nolton Haven	8	38

2.9 In summary, 81% of all season ticket purchases are made before the end of March. Single site tickets represent approximately 85% of those sales with demand typically fuelled by site specific location factors including:

- Off street domestic/holiday home parking provision
- Volume of business/commuter activity
- Regular (assumed to be at least once a week) leisure visits throughout the season
- Peak season visitor holiday parking

2.10 The continuing appeal of our season ticket offer reflects:

- Its ease and simplicity of purchase
- The convenience of use that it offers the motorist (not having to pay on each and every visit)
- Their flexibility of use (transferable between users and vehicles)
- Cost benefit per use compared with the 'pay as you go' parking charges which are presently:
 - up to 30 mins: Nil Charge
 - up to 1 hour; £1.50
 - up to 2 hours: £4
 - up to 4 hours: £6
 - All day: £8

2.11 We have identified an anomaly in our present season ticket offer which should be addressed, namely the circa 3 times price differential between the '**single**' (at £50) and '**all site**' (at £140) tickets'. Both ticket types limit use to a single motor vehicle at any single point in time and neither place any restriction on the frequency or intensity of that use. The current price differential therefore reflects the 'roaming' benefit' only and whilst it is reasonable for the additional roaming benefit to reflect an element of premium, the current differential seems disproportionate.

2.12 Having reviewed the functionality, demand and distribution of our existing season ticket offer, the remainder of this paper seeks to identify a reasonable contemporary price point for that same offer.

2.13 Whilst we do not hold any data on the frequency of use of individual season tickets, we do know that:

- The majority are bought during the early months of the calendar year, giving opportunity for use across much or all of our 8 month charging season
- The anecdotal evidence of our own charging car park team who visit our car parks on a daily basis is that:
 - Many vehicles displaying season tickets are present in our car parks on a very frequent basis, often daily
 - It is not uncommon for a permit displaying vehicle to be parked in excess of 2 hours
 - The use of individual permits to meet recurring long stay parking requirements has become a visible characteristic at some of our car parks.
 - Our Pay & Display data shows that the majority of 'pay as you use' parking sessions do not exceed 2-hour duration.

2.14 Based on the above and adopting a conservative estimate of usage for the average single site ticket of one parking session per week not exceeding 2 hours duration at a current cost £4 per session, the present single site season ticket purchase cost of £50 is equivalent to 12.5 weeks of 'pay & display' parking cost. The duration of our charging season is 35 weeks.

2.15 The table below sets out parking permits which are made available by other car park operators within Pembrokeshire for purchase by the public and are broadly comparable to our own existing '£50 single site' or '£140 all site' ticket offers.

Comparable Season ticket Permit Offers within Pembrokeshire			
Location (Operator)	Season Ticket	Cost	Conditions/Comments
Various (Pembrokeshire CC)	Branded as 'The Coastal' & valid for use at 8 no. coastal sites only (March to October)	£160	Transferable between vehicles. This is directly comparable product to our 'All Sites' permit
	Branded as 'The Puffin' and valid for use at a single nominated long stay site (Annual)	£240	Transferable between vehicles. Target market for these permits appears to users of car parks that operate on a 'year round charging' basis . Pembs CC do not offer a bespoke permit for use at a single coastal site only comparable which if were available, would be more comparable to our 'Single Site' permit

Saundersfoot Harbour (Harbour Commissioners)	Single Site (Annual)	£308	Transferable' between vehicles. Permit numbers are limited and a waiting list system is in operation for new applicants
Coppit Hall Beach, Saundersfoot (Heane Castle Estate)	Single Site (Annual)	£250	Not transferable, nominated vehicle only
Whitesands Beach (St David City Council)	Single Site (Annual)	£75	* Cost to qualifying residents is £15

2.16 These comparables suggest our single site season ticket is currently underpriced at £50 reflecting a cost benefit significantly in excess of reasonable expectations, whilst the current cost of £140 for our all site ticket reflects a very competitive price point.

2.17 If we maintain our assumption of average usage as outlined above (i.e. up to 2 hours once a week), a price increase of a single site season ticket from £50 up to £100 would equate to approx. 70% of the comparable 'pay as you go' cost.

2.18 Maintaining the current price point of £140 for the 'All sites' ticket would address the anomaly identified above by significantly reducing the 'roaming premium' and improving the cost/benefit comparison between single and all site tickets.

3. Consultation

3.1 No formal consultation has been carried out in terms of this proposal. Note this decision sits outside of the car park variation order process which are subject to consultation. Feedback received as part of consultation for previous car park variation order has been considered as part of integrated assessment on the proposal.

3.2 The Authorities Income Generation Group has been consulted as part of this process and recommends approving the price increase for the single site season ticket.

4. Strategic Policy Context

4.1 The proposal aligns with Authority's Policy Statement on Car Parking:

The Pembrokeshire Coast National Park Authority seeks to manage the car parks within its ownership to deliver against the National Park purposes and corporate strategy. Through the management of the existing (40) car parks we seek to,

- Provide access and opportunity for locals and visitors to access the National Park.
- Provide safe, effective parking to meet strategic ambitions of PCNPA.

- Ensure full cost recovery for car park management operations.
 - Secure a reasonable financial return from the public assets within our control for the benefit of public purse.
 - Ensure transparency and ease as well as accessible information.
 - Enable disability accessibility and priorities in proportion of space.
 - Seek to incentivise carbon reductions linked to travel.
 - Prevent car parks being used for overnight camping use, or dominance by outsize vehicles.
 - Enable car parks and associated information to 'add value' to and promote PCNPA.
 - Support local businesses by providing a well-managed car parking facility.
- 4.2 Income generated through increase will assist with maintaining car parks and generate income to support the wider work of the Authority including delivery of its Well-being Objectives, taking account of wider inflationary and budget pressures the Authority is facing.

5. Financial Considerations

- 5.1 The recommendation provides a approach to rectify an anomaly of the prices between single site and multi site offer and bring in line with updated Pay and Display prices.
- 5.2 The broadly accepted concept of a season ticket purchase (whether for rail travel, parking, sport's ground admission etc...) is that the price point should reflect an element of price discount compared to the 'pay as you go' alternative.
- 5.3 Comparison of our current season ticket and pay as you go rates indicates a significant degree of financial inequality in favour of permit holders to the detriment of pay as you go users
- 5.4 Potential increase in income from this amendment.

6. Risk and Compliance Considerations

- 6.1 The proposed increasing our season ticket price points does not require any variation of the Authority's existing Car Park Order
- 6.2 The current price points of, and differential between' our 'single' and 'all site' permits was most recently considered and agreed by Members at their NPA meeting in December 2022.
- 6.3 Experience suggests that any change to the price point of our parking offer will result in vocal adverse responses from a minority of users, community action groups, democratically accountable representatives, and the media
- 6.4 The following may be particularly sensitive to the proposed price increases:
Individuals that purchase season tickets to provide for their own domestic off

street parking needs, despite a likely frequency of use that would suggest a very high level of resulting cost cost/benefit.

- 6.5 Addressing the adverse public reaction will be time consuming for officers and in extreme cases, may involve the financial cost of making good vandalism to on site signage and P&D machines
- 6.6 Any decision to increase our car park season ticket prices at this particular point in time should be considered against the current overarching 'cost of living crisis.
- 6.7 To provide for an orderly introduction, any final decision to increase the 2027 season ticket prices needs to be made by the end of October at the latest to ensure that season tickets can be printed at the new price and be available for advance purchase from early December onwards.

7. Impact on our Public Sector Duties

7.1 Integrated Assessment Completed: Yes

7.2 Equality, Socio-Economic, Health and Human Rights Impacts

- 7.2.1 The proposed change is most likely to have a potential negative impact on low income households, including younger and older people, households with disabled members and carers and families with children with limited income who use the site specific seasonal option and are frequent users of the car park. This may impact on their ability to take up recreational, community or religious worship activities in the Park (including health related benefits of these). Especially in the context of wider impact of cost of living crisis and other inflationary pressures on low income household budgets. Low income households as a result may not be able to meet the one of charge and have to reduce frequency of their access to recreational and community activities in the Park, this could compound existing disparities in terms of low income households (including those who face additional barriers due to intersectionality factors) and their access to the outdoors compared to higher income households. For example, some frequent visitors, particularly disabled people and carers, may regularly visit one specific site because of the accessibility features, toilet facilities, community facilities and support available at that site. As they may be unable to use other sites, they are less likely to benefit from a multi-site season ticket option compared with visitors who can access a wider range of locations.
- 7.2.2 It will also negatively impact on commuters on low wages or experiencing in work poverty who use season ticket for specific site linked to accessing their place of work who will face increase in cost, that they may struggle to meet. It could make it difficult for people to take up employment opportunities in different areas of the Park, particularly seasonal summer jobs. Residents on low incomes with no parking will face increase in cost, that they may struggle to meet.

7.2.3 Although paying a one off charge may be more difficult for someone on a tight budget, the previous £50 is likely to be more manageable than the proposed £100 one off payment. For a frequent user on a tight budget they may need to plan over a longer period to meet the one off payment, enabling them to benefit from not having to pay the higher cost of using pay as you go option (particularly for those using the car park for longer period of time e.g. work purposes.) Those on higher incomes or not facing socio economic deprivation will normally have more leeway in terms of financial position enabling them to manage this increase to a one off cost with limited impact. A stepped approach to the increase could help people plan over longer period to meet significant increase in one off payment.

7.2.4 Potential negative impact on both staff and Members on their well-being due to impact of negative response from public and deterioration in community relations due to increase. This is likely to impact staff outside of car parking services who liaise with particular communities.

7.2.5 Response: This decision is a financial and consistency decision with the Authority's approach to increasing charges aligning with Member agreed policy statement for car parks which notes:

- Provide access and opportunity for locals and visitors to access the National Park
- Ensure full cost recovery for car park management operations
- Secure a reasonable financial return from the public assets within our control for the benefit of the public purse

7.2.6 Income generated through increase will assist with maintaining car parks and generate income to support the wider work of the Authority, taking account of wider inflationary and budget pressures the Authority is facing.

7.2.7 It is recognised that lower income households (taking account of additional intersectionality considerations and commuters in low wages work and experiencing in work poverty) who have cars and use Authority car parks are the group most likely to be at risk of negatively being affected by this change. In response:

- No changes are proposed to the flexibility element of the offer in terms of the frequency of a single tickets use, the duration of single tickets use, the transferability of the ticket between users and the transferability of the ticket between vehicles. Keeping this flexibility provides the option for work places, colleagues, families and friends to pool resources to pay for one site season ticket that can then be transferred between users and between vehicles. Retaining this flexibility may help provide some work arounds for those who struggle to meet the one off payment cost on their own.
- Free parking provision outside of the main tourism season will remain in place -supporting local businesses and offering a gesture of 'good will' for communities.

- 7.2.8 Officers discussed a range of alternative options with Members at Income generation group to see what options would be put forward to NPA.
- 7.2.9 Officers have previously ruled out mitigating option in terms of multiple payments for season parking ticket which could support lower income households struggling to meet a one off payment as it is not operationally viable.
- 7.2.10 The Authority previously following changes to car parking offer provided a small number of season tickets to those experiencing hardship via local charity, however take up was minimal and due to this it was discontinued after one season.
- 7.2.11 Officers will work with communications team to proactively manage messaging and communications in terms of this change.

7.3 Welsh Language Impacts

- 7.3.1 The proposal may impact on low income households that speak or are learning Welsh and their opportunities (and frequency) to access community opportunities to use Welsh in locations where Authority has car parks and are in Welsh Language Sensitive areas. Although paying a one of charge may be more difficult for someone on a tight budget, the previous £50 is likely to be more manageable than the proposed £100 one off payment. For a frequent user on a tight budget they may need to plan over a longer period to meet the one off payment, enabling them to benefit from not having to pay the higher cost of using pay as you go option (particularly for those using the car park for longer period of time). A stepped approach to the increase could help people plan over longer period to meet significant increase in one off payment and help ensure they continue to engage with Welsh language community activities.
- 7.3.2 Authority needs to ensure Welsh Language Standards are met in terms of any signage and communication relating to changes to pricing.
- 7.3.3 **Response:** Officers recognise that lower income households who speak Welsh or are Welsh Learners and have cars and use our car parks may be impacted in terms of their opportunities and frequency to access community opportunities to use Welsh in locations where Authority has car parks and are in Welsh Language Sensitive areas. In particular the increase in one off payment, which requires longer term planning to meet for those on tighter budget. In response:
- No changes are proposed to the flexibility element of the offer in terms of the frequency of a single tickets use, the duration of single tickets use, the transferability of the ticket between users and the transferability of the ticket between vehicles. Keeping this flexibility provides the option for work places, colleagues, families and friends to pool resources to pay for one site season ticket that can then be transferred between users and between vehicles. Retaining this flexibility may help provide some work arounds for those who struggle to meet the one off payment cost on their own.

- Free parking provision outside of the main tourism season will remain in place -supporting local businesses and offering a gesture of 'good will' for communities.

7.3.4 Officers discussed a range of alternative options with Members at Income generation group to see what options would be put forward to NPA

7.3.5 All elements of this work will be delivered in accordance with the relevant Welsh language Standards.

7.4 Section 6 Biodiversity Duty and Carbon Emission Impacts

7.4.1 EV charging points are available at a number of car parking sites and we have seen significant growth in use, thought this does in part match seasonal variations linked to visitors. Currently don't have any data in terms of ticketing options that people using EV chargers select and if any chargers are used by frequent users or visitors who have site specific season ticket (and for example don't have home chargers or chargers linked to their visitor accommodation.)

7.4.2 Due to limited frequent and accessible public transport in Pembrokeshire car travel remains an important mode of transport for many people, in terms of accessing work, community, recreation and holiday opportunities, with resultant need for car parking provision. Increase may result in people switching mode of transport, however wider risk is that for lower income households it reduces their access and frequency to outdoor recreation, work opportunities and community facilities (due to limitations around frequency and accessibility of public transport).

7.4.3 **Response:** Authority will monitor EV charging use across PCNPA car parks to see if any increase on site specific season tickets has impact on EV charging behaviour at these sites. See Equality section re mitigations relating to people on lower incomes.

7.5 Well-being Goals for Wales and 5 Ways of Working (Sustainable Development Principles) Impacts

7.5.1 The majority of considerations correspond with impacts and responses already identified under Equality, Socio-Economic, Health and Human Rights, Welsh Language, S6 Biodiversity Duty and Decarbonisation impacts.

7.5.2 Additional income generated through increase will assist with long term maintenance of the car parks and generate income to support the wider work of the Authority, taking account of wider inflationary and budget pressures the Authority is facing.

7.5.3 No specific consultation has been carried out with public as regards this proposal or with specific groups of car park users, communities and businesses affected. However, information from consultation on previous variation of Car Parking Order, PCNPA Experiences for All report and Pembrokeshire Wellbeing Assessment were considered.

8. Conclusion

8.1 The ongoing operational work to prepare for the 2027 charging car park season requires a final decision on the 2027 Season ticket price points to be made at today's meeting to ensure that season tickets are available for pre-season purchases by the public from early December.

8.2 Members are asked to approve:

- The continuation of the existing season Single and All site permit types
- An increase in the 'Single site' price point to £100
- That the 'All Sites' price point remains unchanged at £140

9. List Background Documentation:

- [Car Park Season Tickets Full Integrated Assessments \(Version 1 and Version 2\)](#)
- [Report to National Park Authority November 2022 42 22-Car-park-Seasons-Tickets](#)
- Report [61/16 Review of the Operation and Management of the Authority's Car Parking Sites](#) November 2016

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