

Report of: Director of Place and Engagement

Subject: Report on 2026 Pay and Display Parking Tariffs

Decision Required: Yes

Recommendation:

The Authority is recommended to agree a new suite of parking tariff across the Authority's 14 no. charging car parks effective from the 1st March 2026.

1. Key Messages

This report follows a presentation made to the NPA Income Diversification Working Group in September of this year on the subject of charging car park revenue and sets out recommendations for the PCNPA charging car park tariffs effective from the 1st March 2026.

2. Background

- a) The National Park Authority operates 14 charging car parks.
- b) The charging car park operation was the subject of an NPA paper in June 2023 (refer to link below at *Para 8.0* 'List of Background Documentation') which Members approved including its recommendations to increase the pay & display parking tariffs as detailed in the table below, effective from the start of the 2024 charging season. In setting these new tariffs Members endorsed the fairness and efficiency of retaining a standardised parking model across its charging car parks. Members agreed during the 2023 meeting that car parking prices would be reviewed annually with the pricing structure reviewed every 3 years. No changes were introduced to car parking prices in 2024 or 2025. This paper provides an updated suggestion for car parking prices, with some changes proposed to the pricing structure a year earlier than envisioned in 2023, for reasons identified below.

Figure 1: Approved pay and display parking tariffs effective from 1/3/2025

	PCNPA Tariffs effective from 1/3/24	Comment On PCNPA tariffs in force (effective March 2024) compared to 2023
Up to 30 mins	nil	No Change
Up to 1 hour	£1.50	50% increase
Up to 2 hours	£3	50% increase
Up to 4 hours	£4.50	New parking period/tariff which replaced the previous 3 hour offer
All Day	£6	20% increase
Coaches All Day	£8	No Change

- c) The cumulative impact of the portfolio expansion from 10 to 14 charging sites in 2021, season ticket price increases in 2023 and P&D tariff increases in 2024 has seen a near doubling of the Authority's parking revenue over the last 5 years, however this has been during a period of significant inflation which has significantly increased operating costs for the Authority. Inflationary costs mean that a £1 car parking ticket in 2020 would need to be charged at £1.27 in 2025 to have the same purchasing power in terms of cost recovery (based on the Bank of England inflationary calculator).
- d) In addition to the wider inflationary challenges which have affected the whole of the UK, the Authority's revenue situation has become materially more challenging as anticipated core funding from Welsh Government cannot be guaranteed longer term. The National Park Authority has a statutory remit which include two key purposes – one for Conservation and the second for Public Enjoyment. Both key purposes drive the activities of the National Park. These services are supported by and link to the car parking provision, for example in funding the management of the Right of Way network in the National Park (accessed by walkers from the car parks) and in providing bespoke services such as EV charging points, drinking water fountains and beach wheelchair access along the Coast. The Authority also makes a substantial contribution to the Coastal Bus service annually, supporting 1/6 of its running costs. In 2023 Pembrokeshire County Council wrote to the National Park seeking support for the provision of toilet facilities around the National Park, particularly in locations near to National Park Authority car parks. After a Member working group considered this request, the National Park Authority committed to paying for the running costs of 10 toilet locations around the coast for a 2-year period running up until April 2026 at a cost of £111k a year. These locations were identified based on the lack of alternative provision, their proximity to sensitive nature sites such as Marine Special Areas of Conservation and their key role in enabling access to the National Park either because of beach wheelchair provision or use by groups such as Outdoor Schools.

- e) In order to support the ongoing provision of support for these wider key services delivered by the National Park Authority which enable the core National Park purposes to be delivered, there is a need to consider whether the car park operation can generate additional revenue going forward, potentially commencing for the 2026 season (please refer to '*Financial considerations*' section below). There is also an ongoing aspiration to improve the provision of services and facilities linked to car parks around the National Park coast. The first project has gained planning permission and is being implemented in Autumn 2025 at Traeth Mawr/Newport Sands involving demolition and replacement of public toilets, together with provision of new disabled changing places, creation of new resurfaced car parking areas new pay and display machines and improved access ramps to the beach all aimed at improving visitor experience and broadening access for those with mobility challenges. Whilst the Authority seeks capital support for such projects, some core funding is necessary to support officer time and develop funding bids as well as initial project development and ongoing maintenance costs. Increased revenue from car parking income would support further projects of this nature around the National Park, providing an improved experience for visitors and broadening access.
- f) Whilst the current P&D tariffs have been broadly accepted by the reasonable motorist since their introduction in March 2024, a further significant tariff increase could prove challenging for some motorists with negative potential consequences for the Authority including a reduction in parking volumes with corresponding adverse impact on parking revenue and/ or the emergence of problematic displaced parking practises within the vicinity.
- g) In developing a suggested amended model, Officers have sought to minimise these risks by developing a charging system which is considered still reasonable and which focuses on increases linked to longer stays, during which the motorist is likely to be accessing some of the wider facilities available such as toilet provision or walking the Coast Path. Officers have also sought to ensure that key valued provisions such as the free half hour which provide benefit to local shops and services are retained.
- h) In addition, there are no proposals currently to change the cost of Season tickets for parking at individual sites or across all sites.

3. Consultation

- a) A formal consultation will be triggered at the stage the Car Parking Order Variation is published by Pembrokeshire County Council on behalf of the National Park. Feedback from that will be considered in the process of the Integrated Assessment. Whilst no formal consultation has yet taken place, in considering the proposals and preparing the Integrated Assessment the Authority has drawn on previous feedback to the Order Variations and from other surveys which have been undertaken.

4. Strategic Policy Context

- a) The information and recommendation(s) contained in this report are consistent with the Authority's statutory purposes and its approved strategic policy context. Section 65(5) of the Environment Act 1995 provides that the powers of a national park authority include power to do anything which, in the opinion of that authority, is calculated to facilitate, or is conducive or incidental to (a) the accomplishment of the purposes mentioned in subsection 65(1) (purposes of conserving and enhancing the natural beauty, wildlife and cultural heritage of national parks and of promoting opportunities for the understanding and enjoyment of the special qualities of those parks by the public); or (b) the carrying out of any functions conferred on it by virtue of any other enactment. The Authority car parks act as a gateway destination to the National Park allowing visitors to park, charge electric vehicles in some locations or to be dropped off by bus before accessing the locations in their vicinity. The income from parking generation helps to support these services and also the wider achievement of the Wellbeing of Future Generations Act goals as assessed in the section below by supporting key facilities within their environs, including elements such as public toilets, beach wheelchairs, the delivery of the Greenways Coastal Bus service, water refill stations and the wider public rights of way network.
- b) Members are reminded of the following policy statement which NPA agreed in June 2023:

Figure 2: Agreed Car Parking Policy Statement from PCNPA Members June 2023

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.*

- c) This policy statement is considered to align with the Authority well-being objectives of Connection: To create a Park that is a natural health service that supports people to be healthier, happier and more connected to the landscape, nature and heritage and Communities: To create vibrant, sustainable and

prosperous communities in the Park that are places people can live, work and enjoy and Climate: To achieve a carbon neutral Authority by 2030 and support the Park to achieve carbon neutrality and adapt to the impact of climate change.

5. Financial Considerations

- a) The Authority has for some time identified that the Authority's future financial outlook is challenging as the impact of cumulative reductions in core funding together with significant cost rises is felt. As identified above, the Authority is also increasingly being asked to subsidise the costs of additional services by other providers, for example paying for toilets in key locations around the National Park. The budget for 25-26 forecasts a deficit of £566k for the year, which would have been significantly higher had the Authority not received a one-off contribution towards the deficit from the Welsh Government in March 2025. Deficits in excess of £1m are predicted for the next 3 financial years:

Figure 3: Draft Budget Forecasts

	Draft Budget	Forecast Budget			
Draft Budget	2025-26	2026-27	2027-28	2028-29	
	£000's	£000's	£000's	£000's	
Baseline gross expenditure	9,880	9,880	10,176	10,482	
Payrise/Inflation etc	0	296	305	314	
Contribution to PCC	110	0	0	0	
Local Generated & Grant Income	-4,485	-4,620	-4,758	-4,901	
Gross Budget	5,505	5,556	5,724	5,895	
NPG	-3,412	-3,412	-3,412	-3,412	
Levy	-1,137	-1,137	-1,137	-1,137	
Earmarked reserves	-390	0	0	0	
Deficit	566	1,007	1,174	1,346	

- b) The real terms reduction in core funding has meant the Authority's requirement to generate increased income to fund core activities is of greater importance. Car park income is one of those sources, resulting in a review to ensure income is maximised through a combination of price increases, charging structure and potential chargeability of all owned car parks.
- c) Despite this, last minute additional revenue settlements from Welsh Government together with increases in other income sources have avoided a deficit position in the last two financial years:

Figure 4 – Final financial position 23-25

	24-25	23-24
Original net deficit budget	(£509k)	(£375k)
Final reported net surplus	£332k	£74k

- d) However, these late awards/additional settlements cannot be relied upon to meet future deficits and do not allow for longer term planning to deliver on

aspirations to improve facilities around the coast. The Authority, in its mid-term financial budget, has therefore resolved to adopt a clear strategy of maintaining a balanced budget position through:

- Strong financial management: The Authority controls and monitors the actual position of the authority on a regular basis setting out actions to correct any emerging issues.
- Asset maintenance: the Capital Programme should ensure adequate programmes of maintenance to sustain values of key assets, especially income-generating assets.
- Maximise resource base: the Authority will ensure the best use of physical and other assets including staff time.
- Value for money: continuous review of budgets to ensure resources are targeted on key objectives and deliver value for money.
- Maximise income streams while at the same time minimising the financial risks to the Authority

- e) Car park income has seen an increase over the last 8 years. The increase reflects the increase in car park charges in line with the previous order as impacted by visitor numbers in the year.

Figure 5 – Car Park Income 2016-2024



- f) Car park operation costs have also seen a general increase in operational costs, but this can vary year on year, dependent on repair/contracting costs. As set out above, there have also been significant inflationary costs across the UK which have fed into increase costs for all elements of provision including material costs.

Figure 6 – Car Park costs 2017-25



- g) The Authority is therefore proposing a further increase of 33% in longer stay day car park charges (100% on coaches) in order to meet increased costs and its mid-term financial budget strategy of a balanced budget. The focus on longer stays also recognises that those staying longer are more likely to use wider services being paid for by the Authority in those locations, including toilets and the Pembrokeshire Coastal Path as well as revenue costs which support delivery of facilities such as the EV charging points within the car parks.
- h) Other options have been assessed by officers, including an option to introduce all year-round charging, however the option below is considered the most feasible which does not generate significant other operational costs.
- i) With terms of reference limited to the known patterns/volumes of parking demand and an assumption that parking demand would remain constant an estimated £300,000 of additional income, depending on take up, could be achieved with the following tariff points.

Figure 7 – Proposed Car Park Tariffs from 1/4/2026

Duration Of Parking Period	PCNPA Tariffs currently in force since 1/3/24	Required P&D Tariffs (assuming transaction volumes remain as per 2024 season) to achieve a circa £300K increase in gross parking revenue
Up to 30 mins	nil	No Change *
Up to 1 hour	£1.50	No Change **

Up to 2 hours	£3	£4
Up to 4 hours	£4.50	£6
All Day	£6	£8
Weekly	£30	Discontinue ***
Coaches All Day	£8	£16

* Change to existing offer would have a significant adverse impact on the '*ultra short stay*' submarket which it serves

** Change to existing offer would have a significant adverse impact on the '*short stay*' submarket which it serves

*** Very low sales volumes do not warrant continuation

Figure 8 – Comparable Benchmarks

Duration Of Parking Period	Proposed PCNPA Tariffs 01/04/26	National Trust Pembrokeshire	Ceredigion County Council	The Harbour (Saundersfoot)
Up to 30 mins	nil	n/a	n/a	n/a
Up to 1 hour	£1.50	-	n/a	£1.50
Up to 2 hours	£4	-	£4	£3
Up to 3 hours		£3	-	£4.50
Up to 4 hours	£6	-	£5	£5.50
All Day	£8	£7 (£10 for campervans)	£7	£12 (12 hours)
Coaches All Day	£16	£20	n/a	-

- j) Pembrokeshire County Council have advised that they will be reviewing their parking charges for 2026 in January 2026, but no details have yet been published.

6. Risk and Compliance Considerations

- a) Traffic Regulation Orders (TROs) are documents which provide the legal basis for the enforcement of prohibitions and restrictions in Off Street Parking Places (Car Parks). These documents can cover, but may not be limited to:
 - Setting fees and charges for using parking places
 - Exemptions for payment of fees and charges
 - Placing restrictions on – the types of vehicles that can use a parking place; the hours of operation of the parking place; the maximum time a vehicle can be parked at a parking place
 - Hours of operation of a parking place
- b) The legal process required to introduce or vary a RO is included within the Road Traffic Regulation Act (1984) (as amended) and is set out in the Local Authorities' Traffic Orders (Procedure) (England and Wales) Regulations 1996 (amended). This process is done by Pembrokeshire County Council on behalf of the National Park Authority.
- c) The proposed changes to the P&D tariffs would require a legal variation of our existing car park order. We most recently undertook the same exercise towards the back end of 2023 through Pembrokeshire County Council at a cost of approx. £13,000. As part of a variation process a public consultation takes place.

7. Impact on our Public Sector Duties

7.1 Integrated Assessment Completed: Yes

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

Positive:

- The provision of free 30 minutes tickets will continue (60 minutes for Blue badge holders).
- Blue Badge holders will continue to receive an additional hour of parking on top of paid period.
- Increased income generation for the Authority which allows it to support wider facilities associated with its car parking offer and which increase access.
- Season tickets will continue to provide an element of price discount compared to the 'pay as you go' alternative
- The increases to longer term stays and to bus coach charges for those parking all day reflects the fact that those staying for longer are more likely to be using wider facilities associated with car parking which are financially supported by the National Park.
- 4 hour parking period supports use of EV charging which have a max 4 hour wait time.
- Will enable enforcement action to be taken
- As an Authority we promote sustainable transport and active travel which can have positive impact on decarbonisation and health and well-being. Increasing car parking charges has the potential to change motorist behaviour to use

alternative travel. However, this needs to be considered within the context of availability of alternative sustainable transport options which may be limited in some areas where car parks are located.

Negative:

- Change in policy favours those on higher incomes who are more likely to be able to cover cost of increase. Potential additional impacts on particular groups linked to intersectionality.
- Those on higher incomes are more likely to be able to benefit from season ticket options and discounts provided from them due to need for one off payment, similarly the better value from payments for longer periods of parking. Potential additional impacts on particular groups linked to intersectionality.
- Across the board people are facing cost of living crisis, which means many people are struggling to meet higher costs – including local community, visitors and local businesses. This will include residents who need to use car parks daily due to their being no other suitable parking facilities for them or people using car parks.
- May impact negatively on those on low wages who use car parking facilities to access their employment, particularly if there is limited alternative public transport or other affordable parking option. Could lead to unsuitable parking on roads and traffic management issues. Commuters won't benefit from ½ hour free parking. Potential additional impacts on particular groups linked to intersectionality and those who are experiencing in work poverty.
- Staff and Members having to addressing any adverse public reaction.

7.3 Welsh Language Impacts

- a) The Authority needs to ensure Welsh Language Standards are met in terms of any signage and communication relating to changes to pricing and start/end of charging season

7.4 Section 6 Biodiversity Duty and Carbon Emission Impacts

Impact:

- a) Increases in tariffs may encourage people to adopt more sustainable modes of transport or active travel, however these options may be limited in the case of some areas where car parks are located and some groups will face additional barriers to using these methods of transport (particularly for some disabled people or older people with mobility needs and those within these groups on lower income may find their transport options limited further.)
- b) 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 PCNPA parking facilities and use the pay and display day ticket options. These groups may also face additional barriers to being able to pay the one-off cost for season ticket, and therefore not benefit from the discount provided, e.g. those on higher incomes are more likely to be able

to access the discount option and be able to cover higher on the day charges. This may impact on frequency that they are able to access opportunities within the Park, including health and well-being opportunities linked to open and green/blue spaces.

- c) Need to consider how to reduce waste/ circular economy approach to replacement of signage with new pricing listings.

Response:

- a) This change will not impact on the Authority's offer of up to 30 minutes of free parking (no return within 4 hours), extended to 1 hour for blue badge holders. This offer can be utilised by those needing to use EV charging car parking spaces regularly.
- b) Approach aligns with Member agreed policy statement which notes: Seek to incentivise carbon reductions linked to travel. It's acknowledged that some groups will face additional barriers to taking up these options, however, may encourage those who do not face additional barriers to select more sustainable/ active travel options where these are available.
- c) We will review options around amendments to signage to take account of waste reduction/ circular economy principles.
- d) In terms of access to open and green/ blue spaces it is recognised that lower income households (taking account of additional intersectionality considerations and commuters in low waged work and experiencing in work poverty) who have cars and utilise our car parks are the group most likely to be at risk of negatively being affected by this change. Also recognised that some groups face additional barriers in terms of alternative transport options so may be reliant on car access. This change will not impact on the Authority's offer of up to 30 minutes of free parking (no return within 4 hours), extended to 1 hour for blue badge holders. Season tickets do offer a reduced cost on the price of daily parking, acknowledging that up front purchase may be a barrier. The season ticket option however remains amongst the cheapest option for similar services in Pembrokeshire. The Authority has worked with local support provider to provide small number of season ticket to be provided to those experiencing hardship. There will remain 'free' provision outside of the season tourism, supporting local businesses as well as offering a gesture of 'good will' for communities.
- e) NPA have a statutory right to charge for services provided and a duty to raise reasonable revenue from assets which it controls. Authority's approach to increasing charges aligns with Member agreed policy statement which notes
 - 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.
- f) The increase will assist with maintaining 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. Concessionary Travel Pass

Scheme is in operation in Pembrokeshire which entitles people aged 60 and over and people with disabilities resident in Wales to free travel on local bus services throughout the principality. (Concessionary Travel Pass Scheme - Pembrokeshire County Council). These can be used on Coastal Buses. Recognise that there may be limited spaces in terms of number of wheelchair users who can be accommodated on bus and issues around availability, regularity and timings of bus options. Authority currently supports a number of projects which are supporting and breaking down barriers to support wider range of people to access the national park, including provision of transport to sites (e.g. PCNPA minibus which includes wheelchair provision.)

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

- a) It is recognised that lower income households (taking account of additional intersectionality considerations and commuters in low waged work and experiencing in work poverty) who have cars and utilise our car parks are the group most likely to be at risk of negatively being affected by this change. It is also recognised that some groups face additional barriers in terms of alternative transport options so may be reliant on car access.
- b) This change will not impact on the Authority's offer of up to 30 minutes of free parking (no return within 4 hours), extended to 1 hour for blue badge holders. Season tickets do offer a reduced cost on the price of daily parking, acknowledging that up front purchase may be a barrier. The season ticket option however remains amongst the cheapest option for similar services in Pembrokeshire. The Authority has worked with local support provider to provide small number of season ticket to be provided to those experiencing hardship. There will remain 'free' provision outside of the season tourism, supporting local businesses as well as offering a gesture of 'good will' for communities.
- c) NPA have a statutory right to charge for services provided and a duty to raise reasonable revenue from assets which it controls. Authority's approach to increasing charges aligns with Member agreed policy statement 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 public purse.
- d) We will monitor impact of £1 increase on 2hrs tariff to see if this has any impact on EV charging event figures or duration.
- e) The overall approach aligns with Member agreed policy statement which notes: Seek to incentivise carbon reductions linked to travel. It is acknowledged that some groups will face additional barriers to taking up these options, however it may encourage those who do not face additional barriers to select more sustainable/ active travel options where these are available. Concessionary Travel Pass Scheme is in operation in Pembrokeshire which entitles people aged 60 and over and people with disabilities resident in Wales

to free travel on local bus services throughout the principality. (Concessionary Travel Pass Scheme - Pembrokeshire County Council). These can be used on Coastal Buses. It is recognised that there may be limited spaces in terms of number of wheelchair users who can be accommodated on bus and issues around availability, regularity and timings of bus options. The Authority currently supports a number of projects which are supporting and breaking down barriers to support wider range of people to access the national park, including provision of transport to sites (e.g. PCNPA minibus).

- f) PCNPA will continue to work closely with PCC on car parking issues and support PSB's poverty subgroup.

Income generated through increase will assist with maintaining 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.

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

8. Conclusion

- a) The Authority's operational car park model/tariff structure already generates an important revenue strand for the Authority. Whilst parking income has increased over the last five-year period, this has been alongside significant inflationary pressures which have simultaneously impacted on wider costs for the service and Authority as a whole. As gateway locations to the National Parks, car parks are an important location which support the Authority's second purpose of promoting public enjoyment. Users of the car parks often benefit from other services as well as the immediate car parking facility, with such services including EV charging points, coastal bus services, water fountains, public toilets and the world famous Pembrokeshire Coast National Trail all of which are supported from the National Park budget as a whole.
- b) Conditional upon a successful variation of the Authority's Car Park Order, it is recommended that parking tariffs at the Authority's 14 charging car parks be set as per the table below with effect from 1st March 2026 This parking revenue to continue to support the provision of the car parking service but also wider National Park purposes.

Duration Of Parking Period	Recommended tariff effective 1/3/26	Comparison of recommended and current tariffs
Up to 30 mins	nil	No Change
Up to 1 hour	£1.50	No Change
Up to 2 hours	£4	33% increase compared to current (£3)

Up to 4 hours	£6	33% increase compared to current (£4.50)
All Day	£8	33% increase compared to current (£6)
Coaches All Day	£16	100% increase compared to current (£8)

9. List Background Documentation:

Environment Act 1995 [Environment Act 1995](#)

Pembrokeshire Coast National Park Authority 2023 paper on Car Parks - [22 23-Car-parking-Season-tickets-and-charging.pdf](#)

Local Authorities' Traffic Orders (Procedure) (England and Wales) Regulations 1996 (amended) [The Local Authorities' Traffic Orders \(Procedure\) \(England and Wales\) Regulations 1996](#)

Pembrokeshire Coast National Park Authority – Corporate and Resources Plan 2023/24-26/27 = Well being Objectives [Corporate and Resources Plan 2023/24 - 26/27 - Pembrokeshire Coast National Park](#)

Road Traffic Regulation Act 1984 [Road Traffic Regulation Act 1984](#)

Well Being of Future Generations (Wales) Act 2015 [Well-being of Future Generations \(Wales\) Act 2015](#)

Welsh Government Advice on the Well Being of Future Generations (Wales) Act 2015 [Well-being of Future Generations \(Wales\) Act 2015: the essentials \[HTML\] | GOV.WALES](#)

Proposed Car Parking Tariffs for 2026 [Integrated Impact Assessment](#)

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