



Truro Park & Ride

Strategic Review

February 2024

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Mott MacDonald
1st Floor, Lakeside 300
Old Chapel Way
Broadland Business Park
Norwich NR7 0WG
United Kingdom

T +44 (0)1603 767530
mottmac.com

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February 2024

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Executive summary

This report sets out examples of the ‘best practice’ models of operation for Park and Ride (P&R) schemes deployed elsewhere in the UK, exploring patronage levels over the last 3-4 years for the Truro P&R services, and understanding factors that could contribute to the recovery of patronage since the pandemic. This has included market engagement with bus operations, and stakeholder engagement with two key stakeholders, Truro Business District and Royal Cornwall Hospital.

The findings from the stakeholder engagement, review of best practice examples, and market engagement, along with a site visit have been used to inform and produce a set of opportunities that are presented as a series of recommendations that the Truro P&R service could adopt in order to increase patronage levels and revenue. These are presented as short term, medium term and long term to align with when they could most practicably be implemented. The short-term aligning with the re-tender of the P&R service being issued during the second quarter of 2024. The opportunities identified are shown below, those recommended for adoption in the short term are highlighted in bold:

- Adapt current service provision to:
 - **Introduce later Hospital Shuttle journeys.**
 - **Work with Treliske Hospital to promote new service.**
 - Realign current Saturday service provision with demand.
 - Extend Monday to Saturday operating hours to 22:00.
 - Keep introduction of a Sunday service open as a longer-term option.
- Encourage patronage growth by:
 - Seizing the opportunity to influence travel behaviour whilst parking at Royal Cornwall Hospital, Treliske is difficult during construction work.
 - Including patronage and performance incentives for the operator in the new P&R contract.
 - **Increasing the discount offered to customers purchasing multi-journey tickets.**
 - Increased and more effective targeted marketing and promotion of the service.
 - Developing a dedicated Park for Truro website.
- Generate additional revenue by:
 - **Phasing out or withdrawing the current 50% discount on day tickets on Saturdays to increase revenue.**
 - **Adopt a basket of fares approach rather than inflation-linked increase for all ticket-types.**
 - **Exploring the viability of introducing a coffee machine concession at sites.**
 - **Installing 6-sheet advertising poster sites in the P&R terminal buildings and high footfall areas around bus boarding points to generate additional advertising revenue.**
 - **Hire of the meeting room at the Tregurra site to organisations and community groups on a similar basis to the meeting rooms at Truro Library.**
 - Increasing the cost of parking in Truro relative to P&R fares.

- Align with **wider policy** objectives:
 - Introduce electric buses at next fleet renewal to deliver decarbonisation of the service, local air quality benefits in the Truro Air Quality Management Area and reduce vehicle operating and maintenance costs.
 - Include enhanced accessibility standards in the specification for future new P&R vehicles.
 - Refresh the parking strategy for Truro to support sustainable transport modes over private cars.
 - Align future development of the service with planned development at Langarth Garden Village.

Following on from the short-term opportunities set out above, a Value for Money (VfM) exercise has been undertaken to understand the likely impacts on costs, revenue and patronage of the options identified for changes to the current P&R bus service levels and hours of operation in the short- and medium term. This highlighted:

- The value that can be realised from aligning the Saturday service with demand by providing a consistent 15-minute interval service throughout the existing operating hours and reinvesting the savings made to provide a later evening service targeted to meet latent demand at shift end times for Royal Cornwall Hospital staff.
- The relatively high incremental cost of introducing a Monday to Saturday evening service until 22:00 over the full route, combined with demand and revenue risks arising from this option being less well targeted at the most evident sources of latent demand identified through stakeholder engagement.
- The high demand and revenue risk to the viability of introducing a Sunday service as there is little evidence of latent demand and city centre car parks are cheaper on Sundays.

The majority of the monetised benefits from introduction of electric buses on the Truro P&R service would be environmental benefits from reduced emissions rather than financial savings. The expected financial savings are small relative to the scale of investment that Cornwall Council would need to make in the absence of grant funding, with a long payback period. Accordingly, this is not an option that can be recommended from a financial perspective alone.

Indicative estimates have been made of the level of revenue that could be generated from the two immediate opportunities identified for commercial initiatives at the P&R sites – 6-sheet advertising poster sites and a coffee machine concession. These initiatives are estimated to have the combined potential to generate annual revenue in the region of [REDACTED]

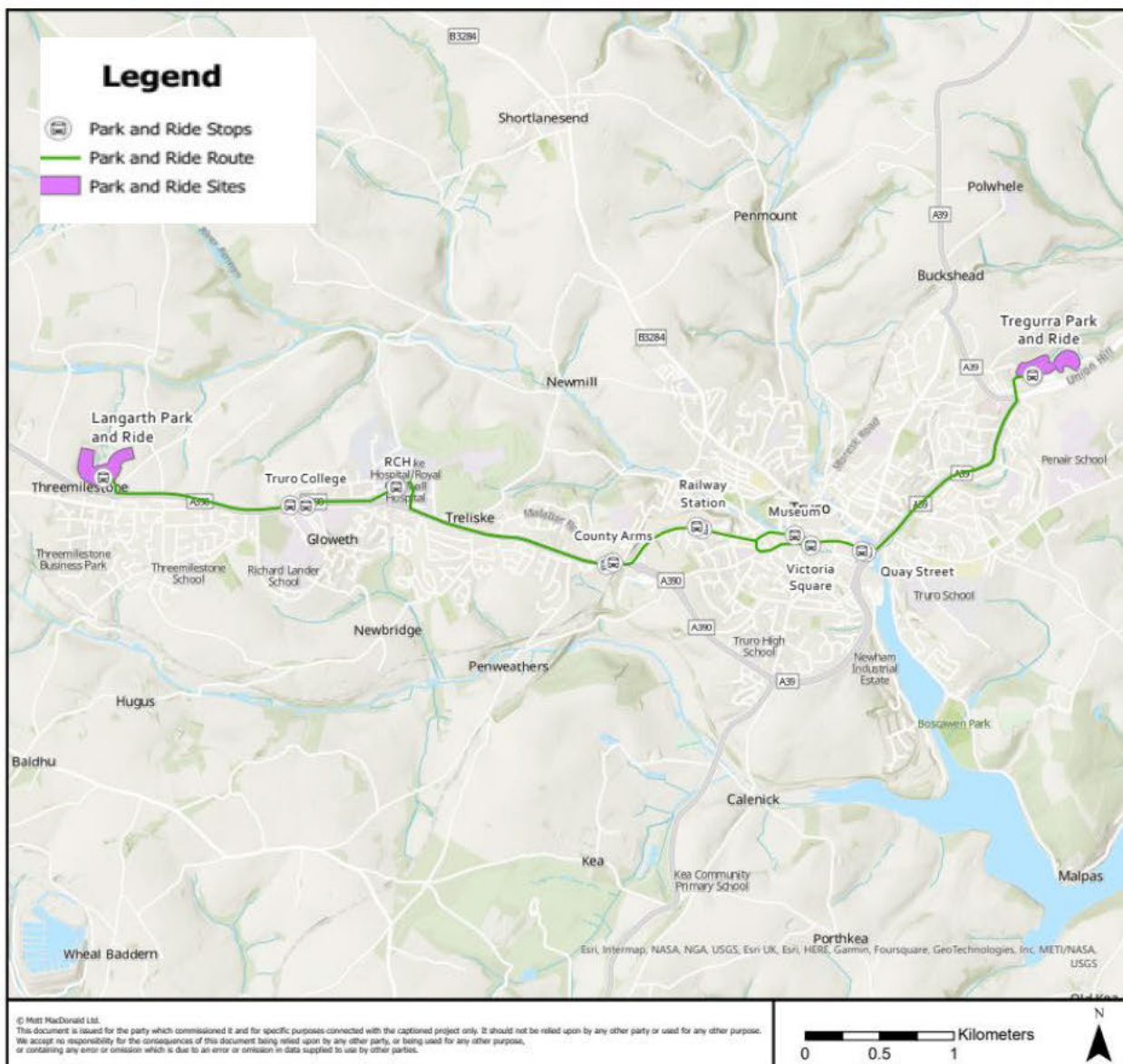
1 Introduction

1.1 Background

The Truro Park & Ride (P&R) service began operations in 2008, initially with a P&R site to the west of Truro at Langarth, and then with the Tregurra site to the east. In total, there are 2,588 parking spaces provided across the two sites (1,209 at Langarth and 1,379 at Tregurra).

The sites are easily accessible by road, with each site, situated off the A390 which runs west to east through Truro. Figure 1.1 indicates the extent of the current P&R network, with both sites and all stops served by the route shown.

Figure 1.1: Current Truro P&R service map



Services on the P&R route (PR1) are currently operated by First Kernow. The route operates Monday to Saturday, with services operating from 06:30 to 19:30. Along with the two P&R sites,

the route serves six intermediate destinations, including the Royal Cornwall Hospital and Truro Railway Station, as shown in Figure 1.2. There is also a dedicated shuttle bus (PR1A) serving the hospital, which runs every 20 minutes between 07:05-09:25 and 14:55-17:35 Monday to Friday.

Figure 1.2: Truro P&R schematic route diagram



Source: Cornwall Council

While all bus services in Cornwall have been recovering from the Covid-19 patronage dip at different rates, the Truro P&R service has been particularly slow to recover to pre-pandemic levels, as identified in Cornwall's Bus Service Improvement Plan (BSIP). With the P&R service due for re-tendering in 2024, new alternative options are being considered by Cornwall Council, to identify ways to generate an increase in patronage and revenue. Although patronage levels have been steadily growing since a post-covid decrease of 75.5% (between 2019 and 2021), patronage is still 38% less than pre-pandemic levels. Additionally, a ZEBRA2¹ bid has been submitted by Cornwall Council to introduce electric buses on the PR1 and PR1A routes. In a wider context, large-scale housing and commercial development is planned around the Langarth P&R site as part of Langarth Garden Village; this will offer the opportunity to generate greater use of the P&R service. As part of current plans for the development, the Langarth P&R site is planned to be expanded to accommodate the growth in local residents.

1.2 Purpose of this report

The purpose of this report is to outline and consider the 'best practice' model of operation deployed elsewhere in the UK, understanding factors which have contributed to the recovery of patronage since the pandemic. Using these best practice case studies, the report considered different operational model options available and explores ways in which revenue can be generated and patronage increased, to ensure the sustainability of the service.

The report provides an understanding of the P&R sites in the wider context of transport and planning strategy and policy in Truro in particular, looking at future development and parking strategies which may impact the service; and considers potential synergies with other current workstreams.

The report outlines the outputs and feedback from stakeholder engagement discussions with Royal Cornwall Hospital and Truro Business Improvement District to uncover ideas on how the

¹ Local transport authorities that submitted an expression of interest to apply for ZEBRA 2 - GOV.UK (www.gov.uk)

current service could be improved from a user perspective and ways in which these stakeholders can support the P&R service.

Lastly the report will outline the options and recommended measures which can be adopted by the council, and introduced on a short-, medium- and long-term basis for the operation of the P&R service, as well as indicating any potential associated risks.

2 Baseline

This section outlines the baseline position, providing an overview of Truro's P&R sites and their current operation. This includes looking at the current performance of the sites and patronage levels in recent years, and a review of the spatial policy and development planning context within Truro and around the P&R sites. This baseline exercise has also been informed by recent visits to each site, and the results of soft market testing with bus operators to understand their views on the current service.

Cornwall Council regard the recent notice given by First Kernow on the existing contract for the Truro P&R service as an opportunity to review and refresh the current P&R offer, whilst retaining the strengths of the current service (such as routes and frequency). Soft market testing indicated that although there is strong interest from operators in bidding for the new contract, the indicative pricing for the new contract provided in responses is above the current council budget. However, Cornwall Council are hoping to provide the solution offering best value rather than the lowest cost.

2.1 Site visit

To gain an understanding of the baseline and current context of both P&R sites, and the Royal Cornwall Hospital (RCH), a site visit was undertaken by Mott MacDonald, accompanied by staff from Cornwall Council's Transport Coordination Service. The findings from this are summarised below:

Current operation

- Charging policy is pay to ride, parking is free.
- Day tickets are purchased on the buses.
- The service is available to non-P&R users at the same fares, for travel from intermediate stops on the route.
- English National Concessionary Travel Scheme passes are not accepted.

Fares

- Multi-day tickets are available via the First Bus mTicket app (the new contractor will be required to provide a similar app for multi-day tickets).
 - Prior to February 2023, day tickets were available from ticket vending machines (TVMs) installed in the site terminal buildings, and multi-day tickets on a smartcard. The TVMs were decommissioned as these were costly to service and maintain.
- Current pricing is relatively low in comparison to other UK P&R schemes (see section 4).
 - On Saturdays, day tickets are priced at 50% of the Monday to Friday price.
 - This was originally introduced as promotional offer to encourage usage on Saturdays but has continued by default.
 - The cost of parking in Truro city centre strongly influences P&R pricing.
 - [REDACTED]
 - [REDACTED]
- [REDACTED]

P&R site strengths and challenges

- Both sites have substantial terminal buildings (see Photos 2.1 and 2.2), within which public toilets and staff facilities are provided. Parts of the building at Tregurra, including a meeting room, are underutilised.
- Both sites have high quality landscaping and planting (particularly at Langarth (see Photo 2.3), but this contributes to high maintenance costs.
- The site staff provided by the operator are primarily customer service staff, not supervisors. They are not empowered to instruct drivers. Additional staffing would increase costs.
- Both sites have smart LED lighting with timing adjustable remotely (see Photo 2.4).

Photo 2.1: Langarth P&R terminal building



Source: Mott MacDonald

Photo 2.2: Tregurra P&R terminal building interior



Source: Mott MacDonald

Photo 2.3: Langarth P&R site landscaping



Source: Mott MacDonald

Photo 2.4: Lighting at Tregurra P&R



Source: Mott MacDonald

Branding

- There is strong and consistent 'Park for Truro' branding across the sites and vehicles. Route branding on the sides of vehicles (see Photo 2.5) features all stops served.

Photo 2.5: Route branding on buses



Source: Mott MacDonald

Bus Operations

During the site visit, the following observations were made about the resilience and reliability of bus operations at times of delay and diversions:

- The bus service was disrupted by a diversion away from the Quay Street stop due to road closures for the Christmas Market.
- Buses from the Tregurra site were delayed by a broken-down HGV on the Tregolls Road approach to Trafalgar Roundabout due to one lane becoming blocked.
- The normal service was not running to timetable but drivers were working together to regulate the service.
- It was noted that drivers searching for free on-street parking spaces in the city centre can cause traffic congestion and delays to the bus service.

Highway signage

- Signage to the P&R sites from the local road network could be more prominent to inform and direct potential users.
- Opportunity for additional advance signage located on the main roads into Truro to provide forewarning for drivers of the availability of P&R sites for travel to city centre.

Royal Cornwall Hospital, Treliske

The P&R service is well utilised for travel to and from the hospital, primarily by staff using the Langarth site. The main hospital staff shift change times are 08:00 and 20:00. It was noted that the existing timetable does not cover the evening shift changeover at 20:00. Public parking charges at the hospital (see Photo 2.6) are higher than in the city centre. At the time of the site visit both the public car park and staff car parks (see Photo 2.7) at the hospital were operating at capacity, which is a frequent issue.

Photo 2.6: Public parking charges at Royal Cornwall Hospital



Source: Mott MacDonald

Photo 2.7: Staff parking at Royal Cornwall Hospital



Source: Mott MacDonald

What does this mean for Truro P&R?

The site visit and our discussions with Cornwall Council staff during the visit have helped to illustrate both the challenges and strengths of the current P&R service. Challenges in terms of the overall underutilisation of the service were noted, which in turn, have presented opportunities to strengthen the current offer and support patronage growth, such as improving alignment of the hours of operation with the commuting patterns of hospital staff who represent a large group of potential users. Furthermore, the site visit raised questions surrounding the need for a higher service frequency from 0800 to 0930 and from 1600 to 1800 on Saturdays and whether demand was sufficient to justify this, illustrating opportunities to adapt the current timetable without the need for additional resources and therefore, added cost.

[illegible]

Overall Performance Summary						
Category	Sub-Category	Item 1	Item 2	Item 3	Item 4	Item 5
Section A	Item A1	Value A1.1	Value A1.2	Value A1.3	Value A1.4	Value A1.5
Section A	Item A2	Value A2.1	Value A2.2	Value A2.3	Value A2.4	Value A2.5
Section B	Item B1	Value B1.1	Value B1.2	Value B1.3	Value B1.4	Value B1.5
Section B	Item B2	Value B2.1	Value B2.2	Value B2.3	Value B2.4	Value B2.5
Section C	Item C1	Value C1.1	Value C1.2	Value C1.3	Value C1.4	Value C1.5
Section C	Item C2	Value C2.1	Value C2.2	Value C2.3	Value C2.4	Value C2.5
Section D	Item D1	Value D1.1	Value D1.2	Value D1.3	Value D1.4	Value D1.5
Section D	Item D2	Value D2.1	Value D2.2	Value D2.3	Value D2.4	Value D2.5
Section E	Item E1	Value E1.1	Value E1.2	Value E1.3	Value E1.4	Value E1.5
Section E	Item E2	Value E2.1	Value E2.2	Value E2.3	Value E2.4	Value E2.5
Section F	Item F1	Value F1.1	Value F1.2	Value F1.3	Value F1.4	Value F1.5
Section F	Item F2	Value F2.1	Value F2.2	Value F2.3	Value F2.4	Value F2.5
Section G	Item G1	Value G1.1	Value G1.2	Value G1.3	Value G1.4	Value G1.5
Section G	Item G2	Value G2.1	Value G2.2	Value G2.3	Value G2.4	Value G2.5
Section H	Item H1	Value H1.1	Value H1.2	Value H1.3	Value H1.4	Value H1.5
Section H	Item H2	Value H2.1	Value H2.2	Value H2.3	Value H2.4	Value H2.5
Section I	Item I1	Value I1.1	Value I1.2	Value I1.3	Value I1.4	Value I1.5
Section I	Item I2	Value I2.1	Value I2.2	Value I2.3	Value I2.4	Value I2.5
Section J	Item J1	Value J1.1	Value J1.2	Value J1.3	Value J1.4	Value J1.5
Section J	Item J2	Value J2.1	Value J2.2	Value J2.3	Value J2.4	Value J2.5

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

The first step in the process of identifying the best person for the job is to determine what the job entails. This involves a thorough analysis of the job's duties, responsibilities, and requirements. Once the job has been analyzed, the next step is to identify the skills and qualifications needed to perform the job effectively. This can be done by consulting with experts in the field or by conducting research on the industry. Once the required skills and qualifications have been identified, the next step is to develop a list of potential candidates. This can be done through various methods, such as advertising the position, reaching out to professional networks, or reviewing resumes submitted in response to a job posting. Once a list of potential candidates has been developed, the next step is to conduct interviews. This involves meeting with each candidate to discuss their qualifications, experience, and interest in the position. During the interview process, it is important to ask questions that will help you assess the candidate's ability to perform the job. Finally, once all the candidates have been interviewed, the next step is to select the best person for the job. This decision should be based on a combination of factors, including the candidate's qualifications, experience, and personality.

[REDACTED]

[REDACTED]

2.4 Review of current planning permissions and agreements

Each P&R site is restricted in terms of permitted use by existing planning permissions. These are both time-based and activity based. Each restriction is summarised below:

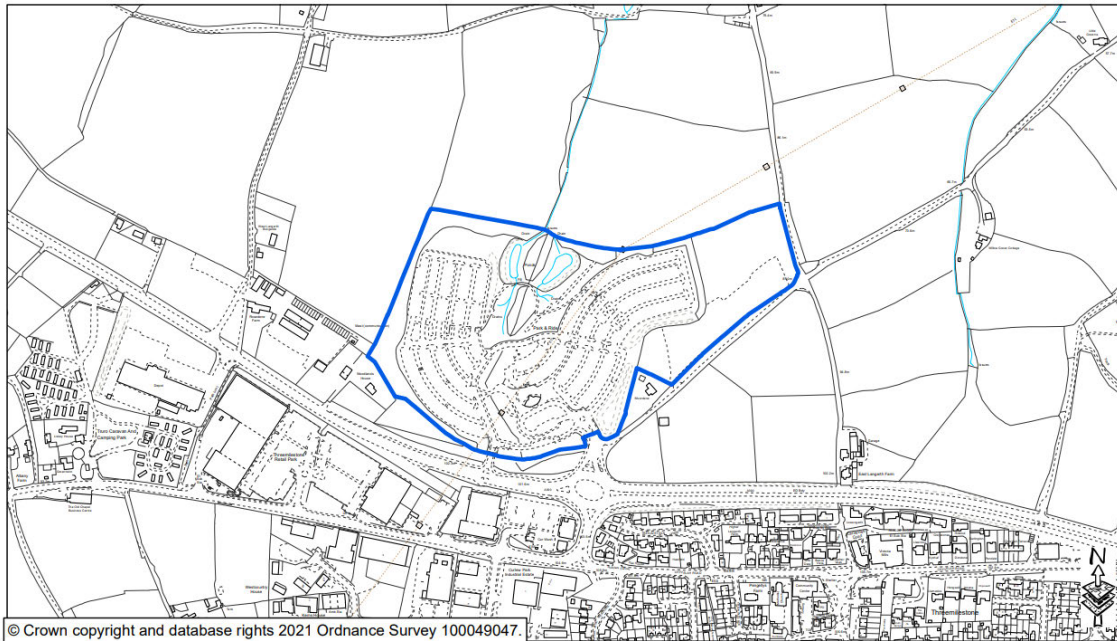
2.4.1 Langarth Site

The Langarth P&R site is owned by Cornwall Council and is currently leased to operator First South West Limited (trading as First Kernow). Current permitted use hours in the lease, which is dated 2021, are between 06:15 and 22:00. The only permitted use of the site is for P&R operations. Relevant planning permissions in the site's history include:

- CK/H/1/C/2 dated 15 August 2007, granted operating hours of the site as 06:45 to 19:30 Monday to Saturday unless agreed in writing with the planning authority.
- MC14/0723/09/B dated 2 June 2009, extended base site operating hours to 06:45 to 20:30 Monday to Saturday.
- PA19/02294 dated 12 June 2019, extended site operating hours to 06:00 to 22:00 Monday to Sunday, with nine extensions per year to 24:00 for events at Stadium for Cornwall. The proposed Stadium for Cornwall is no longer proceeding in its original form, but a smaller scale development on the same site to provide a new stadium for Truro City Football Club and a Community Sports Hub is in progress.

The site lease area extends beyond the currently used footprint of the P&R site, with the site boundary outlined in Figure 2.1 below.

Figure 2.1: Site plan of Langarth P&R site



Source: Cornwall Council Langarth P&R Lease Plan 2

While there are currently extended periods where the Langarth P&R site is not in active use (evenings and Sundays), the lease and planning permissions do not allow for any alternate uses beyond P&R operations. However, Cornwall Council is the owner and acting Landlord of the site, which could simplify the implementation of variations to the planning permissions and lease agreements in the future.

In terms of use for P&R operations, the time restrictions would enable immediate extension of operating hours for the PR1 service to a maximum of 06:15-22:00 Monday to Sunday.

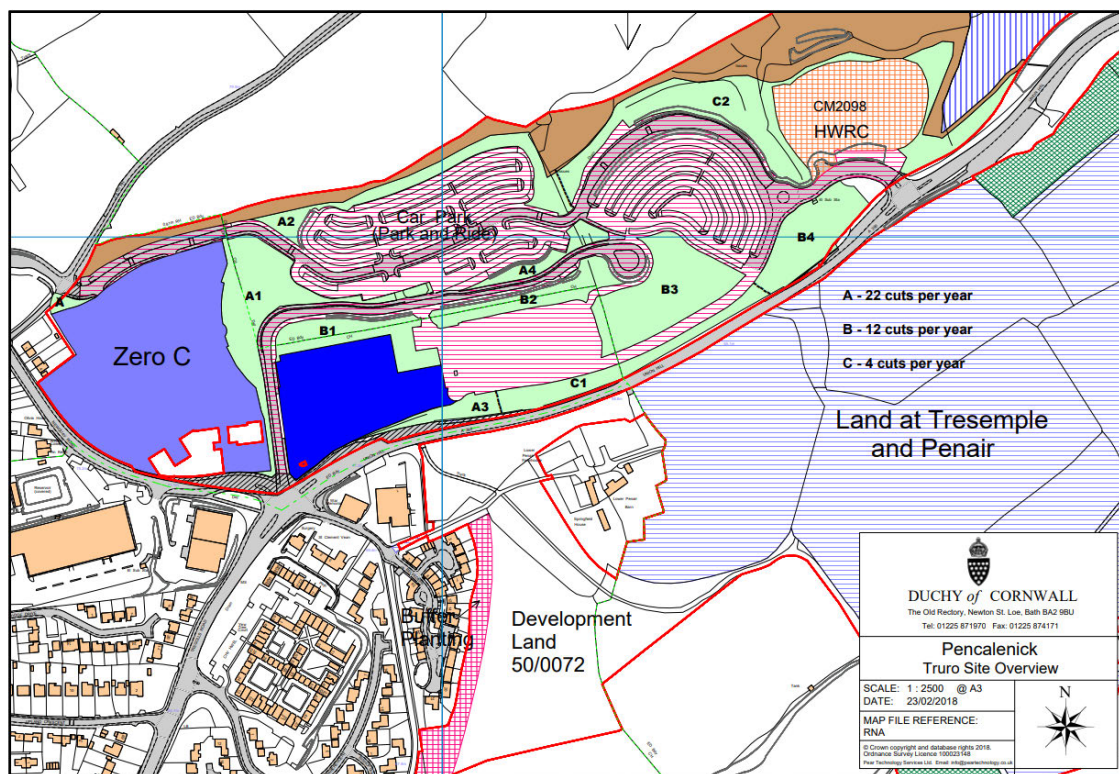
2.4.2 Tregurra Site

The Tregurra P&R site is owned by the Duchy of Cornwall (via HRH Prince of Wales) and is leased to Cornwall Council as a tenant. The current lease is valid for 125 years from 16 November 2016. Tregurra P&R is limited in its use to P&R operations. However, there are allowances for the site to be used for 'temporary use for fund-raising, health awareness, educational, artistic or promotional events'. Any new use must be agreed with HRH Prince of Wales and the Cornwall Council planning department.

Additional 'Amenity lands' surround the existing P&R site footprint and are included in the lease but are strictly limited to amenity use only. Communal areas also intersperse the site, which are equally restricted in use.

Figure 2.2 shows the land available to Cornwall Council as part of the lease agreement.

Figure 2.2: Land use and ownership at Tregurra P&R site



Source: Duchy of Cornwall Truro Site Overview

Only the area hatched in red is available for use, with all other areas restricted for use by the Duchy of Cornwall.

The Tregurra P&R site is sub-leased by Cornwall Council to First South West Limited (First Kernow). Current permitted use hours in the lease, which is dated 2021 are between 06:15 and 22:00, identical to the Langarth site.

Original planning decision reference PA11/04599 dated 26 October 2012 granted approval for the development of the site as a park and ride, initially with no specific operating hours restrictions. Permitted operating hours are governed by the lease agreement above, but no planning application would be necessary to modify service hours.

As with the Langarth site, planning restrictions mean the site can currently only be used for P&R operations, apart from the limited use case of temporary fund-raising activities. As the Tregurra site is not owned by Cornwall Council, any changes to site restrictions could be more difficult than at Langarth.

Again, for P&R operations, time restrictions at the site would only allow for immediate enlargement of operating hours for the PR1 service, to a maximum of 06:15-22:00 Monday to Sunday.

2.4.3 P&R service advertising concession

After the covid-related reduction in passenger numbers, a new advertising concession was agreed between Cornwall Council, First Kernow, and Ad-Smart. A rolling contract for advertising sales was agreed with a split between Ad-Smart (60%) and Cornwall Council (40%). This resulted in quarterly payments to Cornwall Council of [REDACTED] VAT, valid as an 18-month rolling contract which began 1 January 2022.

One of the eight P&R vehicles was removed from service in 2022. This resulted in an agreed reduction in quarterly payments to [REDACTED] plus VAT from September 2022 onwards. Any increase in operating hours or patronage in the coming years could introduce scope to increase the revenue gained by Cornwall Council from advertising on the service.

2.5 Review of strategy/policy

A high-level review of relevant strategy and policy documents relating to the P&R service has been undertaken, this included:

- Truro Town Transport Strategy Refresh – Baseline (2023)
- Truro Transport Strategy Vision Consultation (2021)
- Briefing Note on Progressing the Truro Transport Strategy (2020)
- Cornwall Positive Parking Strategy (2018)
- Cornwall Transport Plan (2022)
- Cornwall Bus Service Improvement Plan (2021)
- Langarth Garden Village Plans (2019)

The relevant sections of these documents, with bearing on the future of the Truro P&R service, are summarised below:

2.5.1 Truro Town Transport Strategy Refresh – Baseline (2023)

The Town Transport Strategy Refresh, while not yet adopted, builds upon Cornwall-wide policies, and aims to increase the sustainability of transport within Truro. Specific goals from the Cornwall Climate Action Plan (2019) and Cornwall Transport Plan (2022) require action in individual towns to make it easier and more affordable for residents to avoid the need for car journeys.

At present, Truro suffers from high car use and congestion, along with low public transport use. Private vehicles account for 40% of local commuter trips, with less than 5% by bus (Travel to Work data). Around 83% of households in Truro have access to at least one vehicle (Census data). Additionally, the low cost of car parking in the centre of Truro is identified as a contributing factor to high car usage. The strategy identifies the widespread availability of free parking (on-street and in supermarket car parks), as well as paid car parking for as little as £4 a day. While also relatively cheap, the then £2 P&R fare (£1 at weekends) is not considered competitive enough.

Bus services into Truro from surrounding areas, while extensive, are not sufficiently competitive with car travel in terms of journey times. Limited bus priority infrastructure exists, leading to bus journey times being slower than car journeys on all key corridors. The abundant availability of relatively low-cost city centre parking also influences the attractiveness of the bus offer. The Cornwall Bus Fares Pilot scheme introduced in April 2022 and the subsequent national £2 single fare scheme in place since January 2023 and running until the end of December 2024 have significantly reduced the cost of bus travel, both in absolute terms and relative to car use.

What does this mean for Truro P&R?

Changing the balance of ease, cost, and speed between private vehicles and bus services is necessary to increase bus use into and out of Truro. The P&R service can only be truly competitive when it is easier to use, cheaper, and faster, than driving into the city centre and using city centre car parks.

2.5.2 Truro Transport Strategy Vision Consultation (2021)

The desire expressed by Cornwall Council officers to refresh the parking strategy to support sustainable transport methods over private cars is reflected in the key themes of this strategy vision:

- Implementing a three-tiered 'onion ring' approach to parking
- Increasing P&R investment and providing a new P&R facility to the south of the city.

Multiple stakeholders were asked to provide input on their 'likes' and 'dislikes' about transport in Truro at present, and what they would like to see in the future. Key findings included:

- The highest rated response to the question of 'What do you like about getting about in and around Truro?' was the P&R service.
- The highest recorded response to the question of 'What do you dislike about getting about in and around Truro?' was Traffic (congestion).
- Truro's Disability forum mentioned that only one wheelchair space was available on P&R services and that their members generally have issues using the service.
- Business and transport leaders identified a need to improve public transport provision in evenings and on Sundays. They mentioned a desire to close some of the city centre to traffic to encourage bus use and walking.
- Parish councillors expressed concern about the impact of raising parking charges in the town centre on lower-paid commuters from Truro's hinterland. They also raised a desire for a southern P&R site.

Across multiple groups, traffic congestion was identified as an existing issue to be tackled in Truro, and most stakeholders were agreed that the P&R service was of positive benefit to Truro. Improvements to the service were suggested by respondents, such as increasing operating hours into the evenings, running the service on Sundays, and better publicising the service offer.

The planned three-tier 'onion ring' approach to parking would also help to increase public transport usage. This plan would consist of:

- Essential parking only in the city centre
- Edge of city centre parking for visitors to park and walk into the centre
- Expanded P&R capacity.

What does this mean for Truro P&R?

Based on this engagement across multiple stakeholder groups, the P&R service is viewed very positively within Truro. The P&R service has potential for improvement and helping to address issues of car use and congestion in Truro. There is an opportunity to take advantage of the positive views of the P&R service and encourage greater use, through marketing and service enhancements.

2.5.3 Cornwall Positive Parking Framework (2018)

This document represents the guiding vision for parking charges across the county. Positive parking aims to change perceptions and challenge misconceptions about the parking sector and address key priorities: congestion, safety, air quality, accessibility, technology, working together, and fairness.

Principles of the framework include:

- Reviewing town centre car parks in the context of future development, growth and supporting urban environment – this could mean re-prioritising the space currently dedicated to car parking in town centres.
- Charging premiums for spaces within the shortest distance to town centres and shops.
- Considering transport fares and P&R prices when setting car parking tariffs. The cost of off-street long stay parking in town centres should be higher than P&R or bus services where possible.
- Considering congestion levels when setting car parking tariffs.
- Taking air quality management areas into account in tariff setting.
- Considering the location in town centres in tariff setting – encouraging the use of car parks away from the centre.

What does this mean for Truro P&R?

Many external factors, including town centre parking charges, affect the success of the P&R service. Usage of the P&R service can only be partially influenced by the operations of the service itself (timetabling, amenities, marketing, etc.). Charges for parking in Truro city centre, which competes with the P&R service, must be considered holistically to effectively encourage greater use of the service.

2.5.4 Cornwall Bus Service Improvement Plan (2021)

The Cornwall Bus Service Improvement Plan (BSIP) notes that the Truro P&R service is recovering from the COVID-19 pandemic and dip in passenger numbers at a slower rate than other local bus services in Cornwall. It is stated that the service will 'require a new strategy to ensure that its service offering meets the needs and travel demands of existing and new users post-COVID'.

Additionally, the BSIP studied the impact of rising traffic levels on journey time length and variability. Across the UK, overall traffic levels have increased by more than 43% between 2000 and 2019, with resulting impact on bus services. The busiest bus corridor in the county is along the A390 from Threemilestone / Langarth P&R to Truro city centre. Significant variability in actual bus journey times has been observed along this corridor on weekdays, as shown in Figure 2.3.

Figure 2.3: Journey time variance between Threemilestone and Truro

	Average	Quickest	Slowest
Early morning -> 06:59	12:48	10:00	16:03
Morning peak 07:00 -> 08:59	14:31	10:49	20:14
Mid-morning 09:00 -> 11:59	14:20	09:58	26:15
Lunch 12:00 -> 13:59	14:33	11:04	22:47
Mid-afternoon 14:00 -> 15:59	16:48	10:59	24:08
PM peak 16:00 -> 17:59	15:14	09:18	23:44
Evening 18:00 ->	11:15	08:11	17:28
Scheduled Journey Time	11:00		

Source: Bus Service Improvement Plan for Cornwall

Apart from evening journeys, buses along this corridor take longer to travel between Threemilestone and Truro than scheduled in timetables, with greater than 100% variation from scheduled times at the busiest periods.

In terms of secondary factors that affect bus and public transport usage, the BSIP identifies cheap city and town centre parking as an issue to be tackled. While there must be a balance between allowing parking in local centres and encouraging sustainable travel, the BSIP notes that changes to parking charges can be concentrated on areas where good alternative public transport options are available. Truro is specifically identified here, with a listed goal of removing all-day cheap commuter parking tariffs in the centre.

What does this mean for Truro P&R?

The existing P&R service offer may not be entirely meeting the needs of passengers in the post-COVID world. Current service provision is primarily focused on 9-to-5 commuting into Truro city centre. Additional patronage could be captured if service hours were increased to include evening periods (allowing extended leisure trips and evening shift workers to use the service) and/or Sundays (again to allow leisure trips and relieve weekend traffic in the city centre).

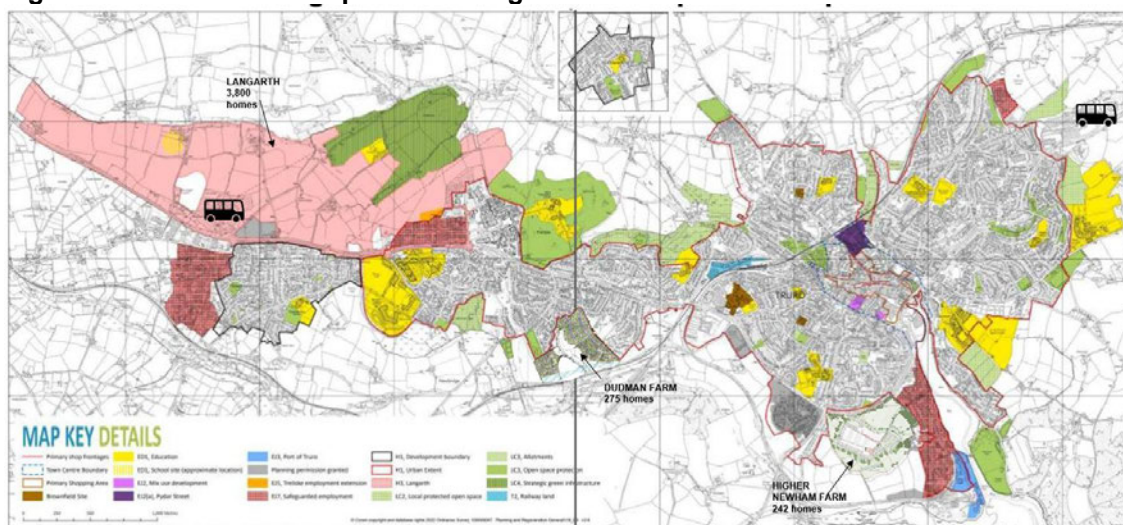
Changes to Truro's parking charges to a level notably above the cost of the P&R service could also nudge more commuters and visitors to use the service.

There are plans to use BSIP funding to deliver a series of additional bus priority measures over the full length of the A390 corridor between Langarh, Truro and Tregurra. This should reduce bus journey times, make peak hour trips more reliable, and increase the attractiveness of the P&R service in comparison to private vehicles.

2.5.5 Langarh Garden Village and Northern Access Road Plans (2019)

Details of the plans for development at Langarh Garden Village are available within the Truro Town Transport Strategy. Headline figures are for around 8,000 to 11,000 new homes, increasing the overall population of Truro by 30%. Figure 2.4 shows the area of development shaded in pink, with the Langarh P&R site at the southern centre of the area.

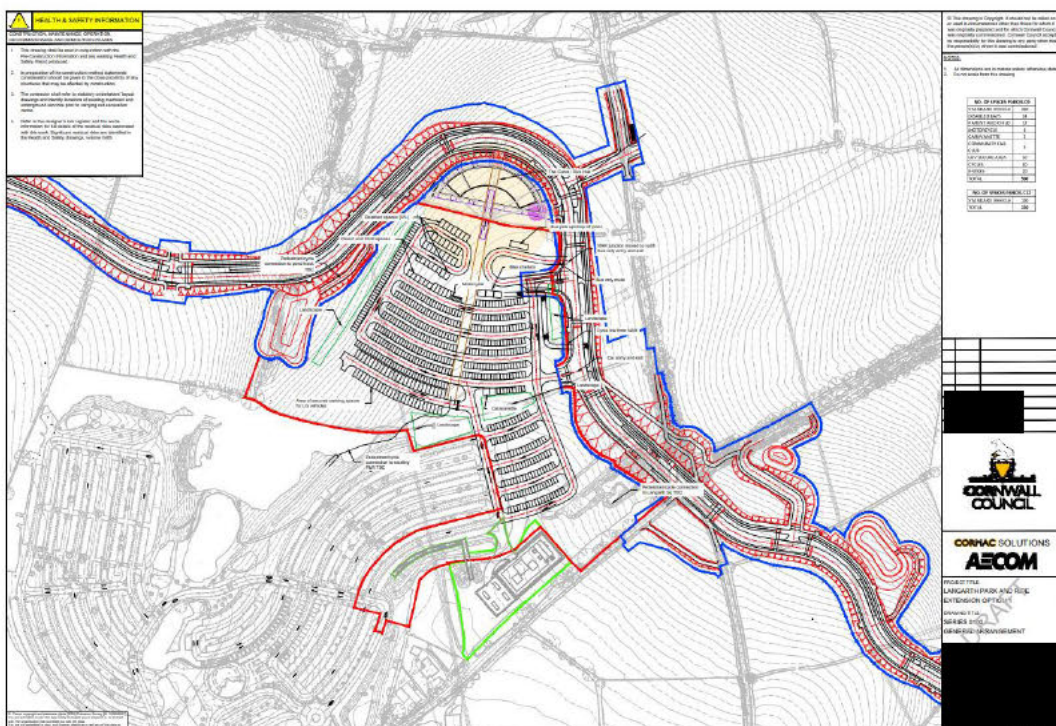
Figure 2.4: Planned development at Langarh



Source: Truro Town Transport Strategy Refresh - Baseline

The Langarth site is planned to be expanded in the future as part of the Langarth Garden Village development. Figure 2.5 below shows the outline plan of the extended P&R footprint, to connect with the planned Northern Access Road (NAR). The NAR will extend from a new junction on the A390 at West Langarth to a second new eastern junction near Royal Cornwall Hospital. Secondary access to the hospital will also be provided. Along with opening new journey opportunities, the NAR will help connect the new housing within Langarth Garden Village to the expanded P&R site, offering the potential for increased patronage.

Figure 2.5: Langarth P&R extension option 1 general arrangement



2.5.6 A390 transport schemes

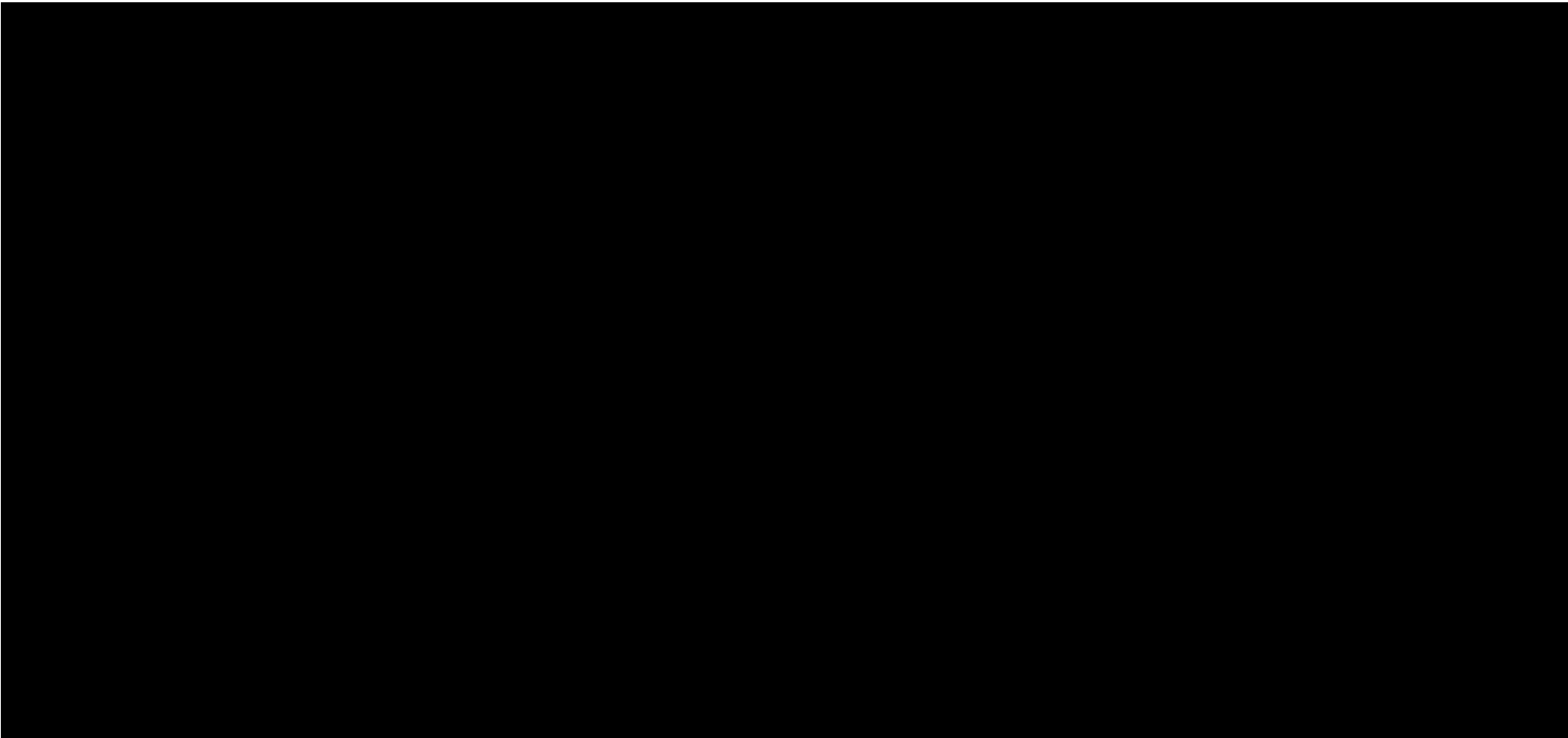
- Virtual bus priority along the A390 adjacent to Langarth Garden Village.
- Additional pedestrian crossing points on the corridor.
- Potential removal of bus lane and priority signal at the eastern junction with the Northern Access Road.
- Potential new bus priority measures at Maiden Green, Treliske, Dalvenie, and Fairmantle roundabouts.

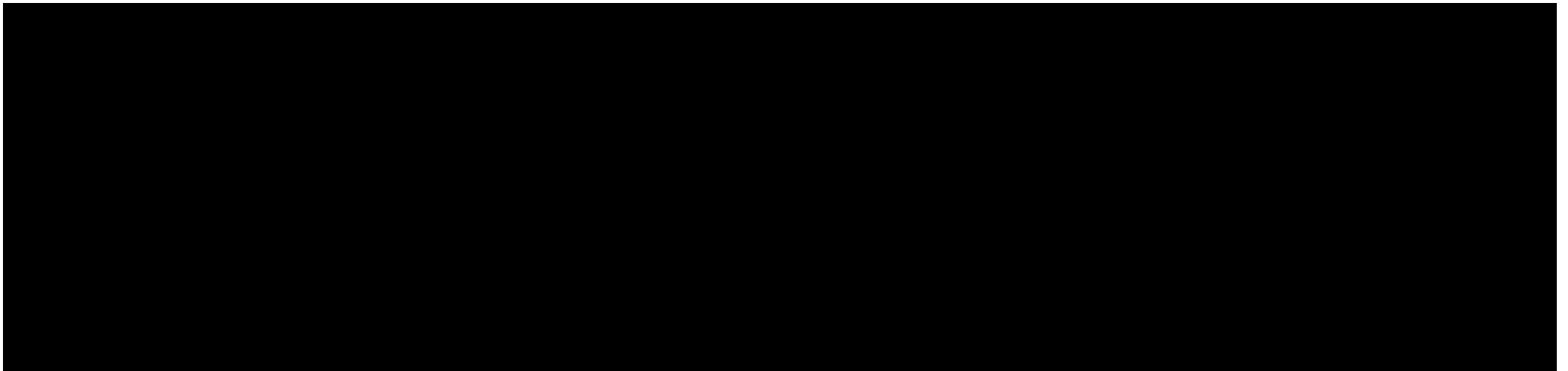
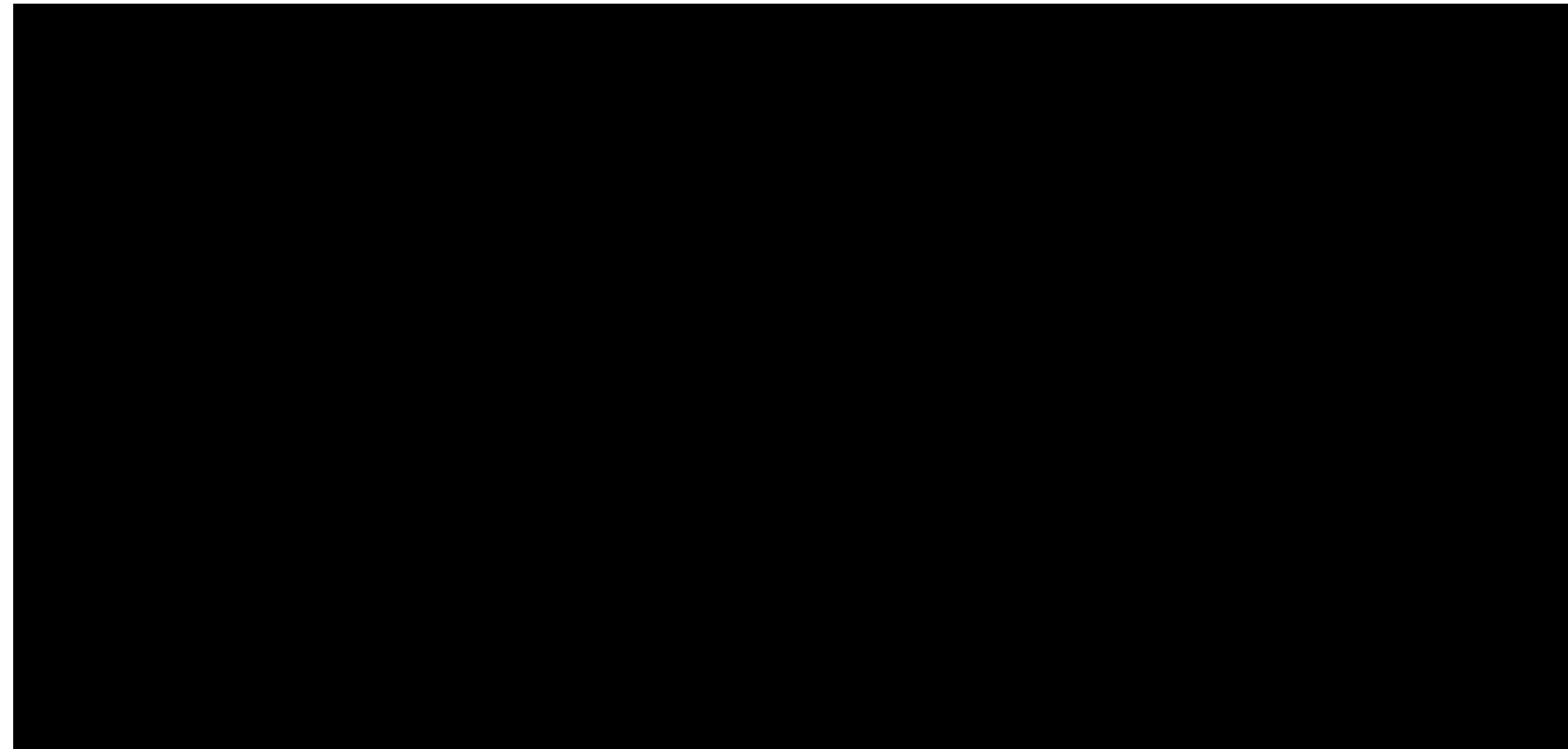
- Potential new bus priority measures at Treliske Lane, Newbridge Lane, Navigator Way, Trelander Highway, Beechwood Parc, and Newquay Road junctions.

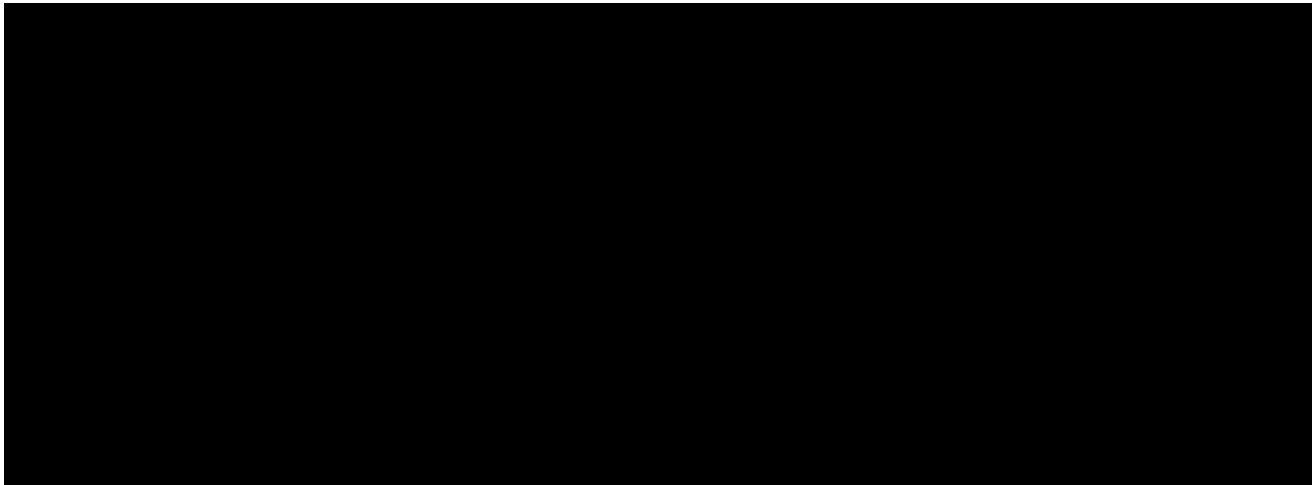
The improvements to the A390 corridor through Truro aim to improve journey times and reliability for bus services. As a significant deterrent of using public transport is perceived poor reliability and uncertainty over journey time, these improvements could increase the attractiveness of the P&R bus services, leading to increased patronage, especially from new residents of Langarth Garden Village.

What does this mean for Truro P&R?

Greater transport integration should be sought with the new Langarth Garden Village development. The scale of the site offers the opportunity to 'plan out' private car use from the beginning. One-seat bus services to Truro city centre should be prioritised over relying on new residents driving, walking, or cycling to the P&R site. Extending the P&R service beyond the existing Langarth site into the new development would likely be a cost-effective solution and lead to a growth in patronage. A one-seat ride would be more attractive to future residents and negate the need to drive for any portion of the journey to Truro. This arrangement could also avoid the cost of building and maintaining additional P&R spaces at Langarth. In addition, the P&R site should be developed as a travel hub, allowing access to/from the site by multiple sustainable modes.







2.7 Other relevant schemes and initiatives

As discussed earlier in this section, P&R patronage levels have struggled to recover towards the levels seen pre-pandemic. Although there are likely to be several factors which have influenced this decline such as changes in working and commuting patterns, improving the attractiveness of the service could contribute to increasing the usage of the P&R sites, helping to remove car trips from the local roads. The following section outlines other current schemes and initiatives which are of relevance to the Truro P&R service and could contribute to patronage recovery.

2.7.1 Increased service operating hours

Cornwall Council's P&R Service Specification 2023, prepared for the soft market testing (summarised in section 2.6), included proposals for potentially increasing the operating hours of the service. While not required as part of the service specification, a Sunday service is mooted, with tentative operation from 09:00 to 17:00 at a 15-minute frequency. Additional later evening services are also proposed as possibilities, either for expanded late shopping evenings or sporting events at the Truro City Football Club and Community Sports Hub.

2.7.2 ZEBRA 2 electric bus bid

Cornwall Council submitted a bid to Department for Transport for grant funding from the Zero Emission Bus Regional Areas (ZEBRA 2) programme in December 2023. The bid scheme consists mainly of new battery-electric buses for the Truro P&R service and associated charging infrastructure. The bid includes funding for the seven single-deck buses required to operate the current PR1 and PR1A services, with one existing diesel bus to be retained as a spare.

Based on the energy consumption and emissions values for diesel and battery-electric single deck buses applied in the Department for Transport's Greener Bus Tool (May 2023), it is estimated that the introduction of seven electric buses on the Truro P&R service would generate carbon savings of 274 tonnes CO₂e in the first year of operation.

In addition to the environmental benefits brought forward by the introduction of zero-emission buses, benefits to passengers and savings in vehicle operating costs will be accrued. The new buses will have fresher and upgraded interiors, as well as lower noise levels and superior ride quality. Electric buses could also offer a platform and avenue for a marketing refresh of the service, making it more visible and attractive to potential passengers. Recent research by ComRes for Go-Ahead's Zero Emission Centre of Excellence found that 55% of respondents said that they would be more likely to travel by bus if they knew that a zero-emission bus was available.

2.8 Summary

The Truro P&R service has great potential to continue regrowing patronage back to and beyond its pre-coronavirus position. Ridership recovered strongly during the 2021-22 and 2022-23 financial years, with year-on-year growth continuing at a lower rate during the period April to December 2023. However, key challenges exist that must be tackled to enable the P&R service to reach its full potential.

- Parking provision and pricing within Truro must be reviewed to ensure that the status quo is shifted to make using the P&R service more attractive and cheaper relative to city centre parking for all types of users.
- Traffic congestion will be partially addressed through planned schemes to increase bus priority on the A390, and longer-term, bus journey times should be competitive or better than private vehicles, at all times of day.
- The P&R service must be integrated fully into current developments (through closer liaison with RCH Treliske) and future developments (by serving Langarth Garden Village).
- Both P&R sites are limited in their category of use, preventing any alternative uses without changes to existing planning consents. However, expanded use cases that are cost-effective would likely be able to obtain planning consent.
- The P&R service hours have the potential to be increased to up to 22:00 every day within the limitations of existing planning consents. Extending the service operating hours could help to support continued patronage growth.
- There is a need for an effectively targeted marketing campaign for Truro P&R to maintain the recent momentum of patronage growth. This should be designed with features to make its impact measurable.
- There are plans to replace the existing Truro P&R bus fleet with new battery-electric buses from summer 2025 if Cornwall Council's bid for ZEBRA 2 funding is successful. This will provide an opportunity for a full refresh and relaunch of the service.

3 Stakeholder engagement

Cornwall Council have held discussions with several stakeholders to gain an understanding of how businesses and different stakeholders such as the Royal Cornwall Hospital, and their employees currently park in Truro and what the barriers are to using the P&R service. These discussions also sought ideas on how the current service could be improved from a user perspective. This chapter presents the findings from these discussions.

3.1 Truro BID

During discussions with Truro Business Improvement District (BID) the key points raised were:

- There is currently a lot of misunderstanding surrounding the P&R service. The BID advocated simplifying it, 'going back to basics' with new advertisement and provision of detailed information on the routes and what the services offers.
- The lack of late running services is a deterrent to some employees using the P&R. A later service would be beneficial for employees working in some of the larger stores in the city centre which close later at 8pm, such as M&S and Primark.
- Truro BID use Survey Monkey and are happy to conduct a survey regarding usage of P&R and to gauge the level of interest in a late-running service.
- Mention of a Sunday service due to an increase in Sunday trading over the last two years. However, this is not financially viable at the moment and city centre car parks are cheaper on Sundays which would increase competition and likely result in low usage.
- Cornwall Council car parks in town are zone A (12 months of the year) which is deterring people from using them, whilst privately owned car parks are becoming cheaper (using parking apps). This is hindering use of the P&R as parking is becoming relatively cheaper.
- Ideas were raised about advertising on buses and the potential for generating revenue from advertising on smart screens and flyers by charging a fee to businesses for this.
- Cornwall Council suggested the potential for advertising on the back of tickets, to which Truro BID responded they would be happy to pay a fee to advertise their local events and would encourage businesses to do the same with, for example, offering 10% discount off their products etc.
- Truro BID will support the P&R service by promoting it in their weekly newsletters which are sent out to residents and local businesses, and assisting with the next marketing campaign which will coincide with car park tariff increases.

3.2 Royal Cornwall Hospital, Treliske

During discussions with the Royal Cornwall Hospital, Treliske, the key points raised include:

- Shift work / hours do not coincide with current P&R service hours.
 - Option raised for extended opening hours to facilitate staff working a 12.5-hour shift. Currently, hospital employees have to park at the hospital or find other arrangements as the shifts are 07:00-19:30. If P&R services were extended until 21:00, usage would increase with a greater number of employees able to use it as their preferred option.
 - 21:00 was raised as if employees are dealing with a patient, they cannot finish at exactly 19:30, so they have a grace period to get back to their cars. Operation until 21:00 allows for this flexibility.
- Staff parking at the hospital is currently cheaper than the P&R (at £1.27 a day). Employees currently have the option of paying monthly or annually via direct debit.

- The Hospital asked if there could be an option for a discounted annual P&R pass for their staff, to incentivise use.
- Outpatient parking is currently £3 for two hours at the hospital. If there are two or more people attending an appointment involving a stay of up to two hours, then the P&R is more expensive.
- Access to staff parking is becoming increasingly difficult. Complaints have been received that it can take up to an hour to clear the staff car park. This is predicted to worsen from July 2024 as there will be extensive building work that will displace parking for both staff and visitors. This building work will continue for the next five years.
- Cornwall Council requested data around numbers of staff working shifts and also asked for details of staff parking pricing. The hospital agreed to provide this information.
- Potential for behaviour change over the next five years whilst the building work is ongoing.

3.3 Other stakeholders

Truro College is also a major employer with a large number of students. The College works in partnership with Cornwall Council and Sustrans to promote active and sustainable travel and many students use direct bus routes to the Truro campus. The bus stops on the A390 adjacent to the campus are served by the P&R buses. The college has free parking on site available by permit. There is an opportunity for Cornwall Council to hold future discussions with Truro College to explore how the current P&R service could be improved for college staff and students and options to incentivise use of P&R by college staff.

Cornwall Council's main office at New County Hall, Truro is served by P&R buses stopping at the County Arms bus stops on the A390. Around 305 Council staff currently use this office. There is staff parking available on site for approximately 400 cars. Free parking is available for visitors.

Following works planned for completion in mid-2026, there will be provision for around 480 staff to work from New County Hall. There are also plans to provide more public-facing services from this location which are expected to lead to an increase in visitor numbers.

The current potential to increase the number of Council staff using P&R is limited by the capacity available for staff to park on site. However, the plans to increase the number of Council staff working at New County Hall and to provide more public-facing services from this location will create opportunities to implement Travel Plan measures to increase the number of Council staff and visitors using P&R for travel to New County Hall.

3.4 Summary – what does this mean for Truro?

The feedback from the stakeholder engagement sessions indicates that although there is still a demand, the current P&R service does not serve the needs of all users. However, this presents several opportunities to adapt the current operating hours and timetable to suit changing travel patterns by considering the following:

- Adapting current services to meet the needs of changing market behaviour - both Truro BID and RCH Treliske indicated that commuting patterns of staff are no longer simply the traditional Monday-Friday 9-5. The hospital in particular has a large proportion of shift workers finishing late in the evening and this is true also of retail and hospitality staff who often finish outside of the existing service hours.
- The rise in cheaper, private car parks in the city centre, and the price of outpatient parking at RCH being cheaper for shorter stays than using P&R when more than one person is travelling, is creating additional competition to the P&R service and could be detrimental to efforts to grow patronage.

- The P&R service must be able to compete with these prices to incentivise users, as well as providing a timetabled service which meets their commuting requirements.
- Discussions with the hospital also revealed that staff parking is becoming increasingly difficult due to the volume of traffic, coupled with extensive building work due to start in Q2 2024, which will exacerbate this issue.
- This presents an opportunity to promote the P&R as a more attractive option, if using the hospital car park is becoming increasingly difficult.

If the P&R service was adapted to meet these needs, whilst still providing the current services, there is an opportunity to increase patronage by capturing a wider market. There are several ways in which this could be achieved:

1. A shuttle to the hospital from Langarth P&R would provide a late-running service for shift workers however, this would exclude those finishing late in the town centre.
2. Reducing the peak frequency of Saturday services, and instead, providing a late-running service on weeknights. This could be done at a relatively low net cost and serve both hospital staff and businesses/users in Truro town centre.

In summary, there are opportunities to increase patronage and revenue on the Truro P&R service by adapting the current service instead of simply providing additional services. By reinvesting the savings available from aligning service provision with demand where there is current overprovision, there is potential for this to be done at an affordable cost, whilst removing barriers to attracting new users and providing incentives for them to use the service.

4 Best practice review

The following section outlines the operating and maintenance arrangements for P&R sites in Leeds, York, Cambridge, and Chester. The information provided here was derived from direct meetings with representatives from either, the Local Authority or information provided by the client. The examples highlighted in this section have been used to indicate alternative P&R operating models, of which some elements could be applicable to Truro P&R.

4.1 Leeds

4.1.1 Contract arrangements

There are three P&R sites in Leeds, all of which are run by First Bus. The contract for running the bus services and manning the sites was tendered by the West Yorkshire Combined Authority (WYCA) who also determined the standards and requirements for the P&R services.

4.1.2 Maintenance

Site maintenance is managed by Leeds City Council (LCC), the costs for which are covered through a license fee which is paid by the bus operator (First Bus). Currently as of March 2023, this is [REDACTED], per P&R site. This is used to cover operating costs such as lighting, CCTV, and staff maintenance and cleaning costs. The licence fee is index linked so increases each year but roughly based on [REDACTED] per space (per annum); for the first 2 years LCC waived the licence fee whilst demand built up, which gave the operator chance to make a profit.

The largest site running cost is the business rates, which are circa [REDACTED] (at Elland Road).

4.1.3 Operating arrangements

The operating arrangements are set out below:

- First Bus provide the site staff.
- P&R bus services are tendered by WYCA, with First Bus currently operating all sites/services in Leeds.
- First Bus take the revenue risk.
- Once services start making a profit, First Bus take a share of this, and LCC and WYCA take the remainder.
- Services in Leeds are only just breaking even and making a small profit post Covid.
- There were some afternoon peak capacity issues which required more buses, in turn hitting profit i.e., Leeds find that the morning peak is more spread than the evening peak.
- Elland Road uses three buses to operate, whilst Temple Green uses four.
- Bus service costs roughly split:
 - 50% driver costs
 - 10% fuel costs 20% vehicle costs
 - 20% supervisor costs

4.1.4 Fares

Current fares set at £4 for a day return, but this has recently been increased (Feb 2023), previously at £3.50 day return, services were struggling to return a profit. The fares are set in line with WYCA Mayoral bus fares.

4.2 York

A key point from the meeting with the City of York Council (CYC) when discussing their P&R operations, was that there has been a significant change in dynamics of their P&R sites in recent years (in addition to the impacts of COVID). Namely that there has been a decline in city-centre working and commuting and a decline in retail which has significantly hit passenger numbers. This has led to a net decline in revenue alongside rising site and service operations costs. Patronage levels at present in York have reached about 85% of pre-Covid levels.

4.2.1 Contract arrangements

- The P&R sites, and operations of bus services, are all done under one contract with one operator.
- Current contract is with First Bus (2018-2025).
- First Bus currently pay CYC circa [REDACTED] to run all the P&R sites (of which there are 6) and to run the bus services (42 buses used to fully operate all sites during peak periods, 38 vehicles during other time periods).
- The amount First Bus paid to run the P&R operations in York previously was [REDACTED] pa between 2008-2018. [REDACTED]
- The direction of travel with regards to falling patronage, and therefore revenues, whilst costs are increasing, mean that in future the York P&R are no longer commercially viable, therefore CYC will need to pay an operator to run the services, rather than the other way round.

4.2.2 Site maintenance arrangements

- As part of the contract, First Bus undertake the maintenance of each site. This includes cleaning, gardening etc., and operate the sites, such as providing staff and manage ticketing.
- 'Wear and tear' maintenance is undertaken by CYC.
- About [REDACTED] is required to staff sites; this brings with it the added benefits of helping to reduce vandalism, improve people's sense of safety and help with ticketing to improve boarding times.

4.2.3 Operating arrangements

- For each bus used to serve a site, [REDACTED] is required per annum.
- For First Bus, the P&R operations in York are a large part of their operations (about a third) and integral to their overall York operations.

4.2.4 Fares

- Fares are agreed between CYC and First Bus and are based on a formula which limits the year-on-year fare rise but allows First Bus to set fares considering increase in fuel costs.

4.2.5 Options for future revenue

Like the additional revenue which may be needed for this scheme, CYC are conscious of the need to improve commercial viability of their P&R sites in advance of retendering in 2025.

- Plans to use Bus Service Improvement Plan (BSIP) funds [REDACTED] to aid in transforming P&R sites to help with this.
- Plans to turn P&R sites into multi-modal hubs – non-P&R services can then use the site and provide interchange opportunities between services for onward trip destinations that are not solely the city centre.

- Option to run half frequency of existing express P&R services, and then utilise existing local bus services, which when combined provide the high frequency service currently on offer.
- Option for non-P&R services calling at the site to pay a departure fee to help raise revenue.
- Offer overnight parking for those staying in York which would require a charge.
- Introduce e-scooter and e-bike hire schemes which companies will pay to host at P&R sites.

4.3 Portsmouth

Unlike the others, there is just one P&R site in operation in Portsmouth, located at Tipner Interchange (M275, Junction 1). The service operates seven days a week on the following timetable:

- Mondays to Fridays: 07:00 to 19:15
- Saturdays: 08:00 to 19:15
- Sundays and public holidays (except Christmas Day): 09:00 to 18:00
- The P&R car park opens/closes 30 minutes before and after the above times.

4.3.1 Contract and operation arrangements

The current contractual arrangements for Portsmouth P&R service comprises of a tender agreement for the bus service operation with First South, whilst the site is maintained by Portsmouth Council. The P&R service operates a 'pay-to-ride' service whereby the user pays per car (and up to five people) via an on-site ticket machine, users get their ticket prior to boarding the bus.

There is no profit share agreement in place, the Council take all revenue generated. However, the site is currently struggling to make a profit (roughly 50% of pre-covid levels) and there are discussions about a new tender late 2024. Although, Portsmouth P&R recognises the localised strengths including the leisure and tourism demand on a weekend which it hopes to maintain.

The P&R bus service has a current peak vehicle requirement (PVR) of two buses for operation of a 15-minute frequency. This was reduced from three (the third now used as a spare).

4.3.2 Site maintenance arrangements

The council are responsible for all maintenance requirements; due to profit struggles maintenance is being scaled down by a number of potential interventions in place at the site including:

- Reducing the landscaping regime.
- Potential closing of terminal building (however, it is anticipated that this would save minimal money and make the facilities considerably less attractive).
- Turning off the vending machine due to high electricity costs, reducing staffing required to maintain/fixing.
- Potential for closing some areas of the car park, but antisocial behaviour is a current problem that could be exacerbated by this.

4.3.3 Additional revenue options

To help improve the profitability of the service, a 'connected service' was suggested which combines and links the P&R service with local bus services; this maintains the normal frequency of buses but reduces the PVRs and therefore, the overall running cost. In Portsmouth, this has reduced the PVR from three to two whilst sustaining the 15-minute service frequency.

Portsmouth Council are also exploring alternative uses for the site building to generate additional income; options include a mobility hub which would strengthen the connected services and provide a public transport interchange with local services and the dedicated P&R service.

4.3.4 Fares

- The P&R service operates on a pay per car basis. Fares cover up to five people travelling together in one car.
- A day ticket is priced at £4. Day tickets are sold from a ticket machine in the P&R terminal building and cover unlimited use.
- A full range of flexible multi-journey tickets (10, 20 and 50 days) and season tickets (1 week, 4 weeks, 1 year) is available to buy or top-up online or from a smartcard machine in the P&R terminal building.

4.4 Cambridge

4.4.1 Contract arrangements

- Cambridgeshire County Council (CCC) do not tender the bus services serving the P&R sites. This is partly due to the lack of competition in the area, which may mean tendering the services would not return any competitive bids.
- Operators used Euro VI vehicles but since the roll-out of new electric buses in Cambridge, the P&R is set to be 0% emissions and 100% electric by June 2024².
- P&R services are operated through an Open Access Agreement, which means:
 - Any operator can register a service, but there is an agreement they must sign which stipulates the minimum frequency (20mins), the quality of the service and the length of time an operator must give notice to withdraw a service (6 months).
 - There is a [REDACTED] charge per departure for operators, with operators keeping all revenue, this raises approximately [REDACTED] per site per year.

4.4.2 Site maintenance arrangements

- Each site costs [REDACTED] per annum to maintain, with additional staff costs [REDACTED] across all five sites. Therefore, the total is [REDACTED] for all sites, which is [REDACTED] per site per annum.
- Staff for maintenance is provided by CCC (such as, landscape, car park maintenance, ticketing, toilet cleaning etc.).
- With an [REDACTED] income for each site from departure charges, this leaves a shortfall in the region of [REDACTED] per site per annum.
- CCC can subsidise the maintenance and operating costs from other budgets in the council, namely revenue made from on street parking, which is used for transport.

4.4.3 Operating arrangements

- CCC operate the sites and bus operators operate the services on commercial basis (no tendering).

4.4.4 Fares

- Current fares are set at £3.50 for a day return.

² Cambridge's First Electric Buses | East | Stagecoach (stagecoachbus.com)

- All revenues kept by the bus operators.
- Currently, there is no enforcement to stop people from simply using the site as a car park and not using the bus. This obviously results in some lost revenue for operators, but difficult to enforce, and would require additional staffing to do so.
- Cambridge P&R sites are at around 80% of pre-Covid levels with service frequencies returning to normal, running a circa 10min frequency.
- They do have ANPR that was introduced as part of the temporary £1 daily parking charge, but these are no longer switched on.

4.4.5 Other revenue arrangements/options

- CCC raise revenues from on street parking to help pay for site operations and maintenance.
- They also [REDACTED] per annum on car boot sales using their sites, bike locker chargers, even charges for production companies wanting to use their sites for filming.
- In addition, the Greater Cambridge Partnership (GCP), who are the body who oversee the delivery of the Cambridge City Deal, are providing [REDACTED] per year in funding to support the current P&R sites. However, this is limited funding, for a limited period.
- Future possibilities of using revenues for possible congestion charge as part of the Cambridge City Access scheme.
- CCC briefly introduced a parking fee at the P&R sites, which was £1 per day, but got rid of it in 2017 after only 3 years as it drove down demand.
 - Around 20% of demand was lost when the charge was introduced.
- Sites operate on a 24-hour basis, which allows people to park overnight and pay to leave their cars there. This is often used by tourists visiting and staying in Cambridge who need somewhere to leave their cars.
 - This makes [REDACTED] per annum across all five sites.
- There are waiting facilities, but these are only open during the core operating hours of the day.
- CCC are considering turning P&R sites into Travel Hubs, allowing non-P&R services to call in. This would help increase revenues from departure charges.

4.5 Chester

4.5.1 Contract arrangements

There are currently four P&R sites in Chester serving the city and providing a gateway from the strategic road network. These include:

- Boughton Heath (750 spaces)
- Wrexham Road (1200 spaces)
- Upton Zoo (Leased land 460 spaces)
- Sealand Road (760 spaces, currently closed (not operational)).
- A fifth P&R site is also referenced in current local plan.

The P&R is currently a gross cost contract model, but the council are looking to change the contractual model in the longer term. Historically, it has been challenging for an operator to run a commercially viable, and successful, P&R service. Although, consideration has been given to separating the P&R services into individual contracts in the future with differing arrangements for each route. For example, some routes would be operated under a gross cost contract and others under a revenue cost contract.

4.5.2 Operating arrangements

- The current offer includes a bus frequency of 12-20 minutes, depending on site and time, operated by 8 Euro VI diesel buses.
- Facilities: real time passenger information is provided at all sites (excluding Sealand Road) and all sites have passenger information and timetable displays.
- Staffing: There is a total of two staff members working across the 3 sites.

4.5.3 Fares

- Ticket machines have been removed (as of August 2023) at the P&R sites; passengers now pay by cash or card on buses; the fares are as follows:
- £2 fare (unchanged since 2014)
- Parking is free.

4.6 Summary – what does this mean for Truro?

The case studies explored in this section have shown the different operating and maintenance models for P&R sites. Similarly, both Leeds and York run a tendered service (the current operating model in Truro), however, there are subtle differences in the way that the sites themselves are managed. In York, all operations for the P&R sites are tendered alongside the bus operations, with the operator running all P&R elements. In Leeds however, the operator runs the bus services through a tender agreement and takes the revenue risk with a profit share agreement. The operator provides the site staff but pay a license fee to the council which pays for the site maintenance. Although likely to require subsidy in early years, this operating option is appealing as it yields potential to drive profit later, when the site is established. In York, this is similar, but is a more attractive option for the Local Authority, as the operator is responsible for all operations and management of the P&R sites.

Cambridge presents a slightly more unique example, whereby the service is commercially operated, and the site is maintained and operated by the Council. Here, the operator runs services through a quality agreement (therefore, no tender process), and keeps all revenue, but pays an access fee to use the P&R sites. However, maintenance and operating costs are covered by the council. This operating model is an attractive option to operators, but once demand has built up; again, it may require subsidy in the beginning. In Chester however, it was noted that it has been challenging for the operator to run a commercially viable service. Unlike the others, consideration has been given to separating the P&R services into individual contracts in the future with differing arrangements for each route.

Fares are largely ubiquitous across the examples, ranging from £2 for a single fare to £3.50-£4.00 for a day ticket. However, it has been noted (for example, in Leeds), that prices have recently had to increase in order to try and return a profit, an issue which is becoming more prevalent.

This section, and the case studies explored, have highlighted that a tendered service is a popular operating model and can be the most viable option when patronage is recovering (post Covid), and revenue generation is low. The examples of Leeds and York have shown that despite a tendered service, there is still autonomy in the site operation and maintenance, which can be organised in more than one way, to suit the operator, the council, and the local context of the site.

Given Cornwall Council already run a tendered service, the alternative ways in which the site could be managed, and additional revenue sources generated, could be a worthwhile exploration to incentivise and encourage greater use of the bus service and recover patronage levels to sustain a successful service and cater for current demand.

5 Option development and assessment

This section provides a high-level overview of potential operating and contract model options which could be applied to Truro P&R in order to increase patronage and revenue takings. An overview of the current service and its current operating arrangements is also provided.

5.1 Current P&R service and operating model

The Truro P&R service began operations in 2008, initially from the Langarth facility situated to the west of Truro, followed by the development of the Tregurra site to the east.

Operating model

The current operating model has been in place since 2015, and sees the service run on behalf of Cornwall Council under a competitively tendered contract with First, who operate the bus services and provide the customer service staff for the sites. The vehicles used to operate the service are owned by Cornwall Council and leased to First for the duration of the contract. First will continue to operate the service until January 2025, after which a new contract will be let. The current model of operation is based on pay to ride (£2.20 all day for adults, with family and flexible multi-journey tickets available). There is no charge for car parking.

Service provision

The Truro P&R bus service PR1 is in operation Monday to Saturday 06:30 to 19:30 with a 10-minute frequency during peak hours (08:00 to 09:30 and 16:00 to 18:00). Buses operate every 15 minutes prior to 08:00 and during the interpeak period, with a reduced 20-minute frequency after 18:00. There are no Sunday or Bank Holiday services. Key destinations served by the current service include Truro College, the Royal Cornwall Hospital, New County Hall, and the city centre.

An additional Hospital Shuttle service PR1A operates between Langarth P&R and the Royal Cornwall Hospital from 07:00 to 09:30 and 15:00 to 17:45 on Mondays to Fridays only.

Site operation

The Council require both terminals to be staffed between 06:00 and 20:30 with additional staff dedicated to overseeing the management of day-to-day service operations. Furthermore, the buildings, infrastructure and landscaping at both sites require upkeep and maintenance (the cost of which is currently covered by the Council).

Contract model

The current contract model is a gross cost contract, with the operator paid a fixed daily rate for the provision of the services specified in the contract. All income from ticket sales is paid to the Council. The contract provides for deductions to be made from the contract price should the operator fail to meet the service standards as detailed in Schedule 1 of the contract documents.

The contract also includes five Key Performance Indicators (KPIs), with targets set for each KPI and requirements for management reporting against each KPI specified.

The contract includes no provisions to incentivise the operator to deliver levels of service that exceed the contract specification or KPIs, or go beyond contractual obligations regarding the provision of service information and promotion of the service.

5.2 Operating and contractual model principles

Fundamentally, there are two options available to Cornwall Council for providing the Truro P&R service: operation of the service directly or by outsourcing through one or more contracts.

Within an outsourced model of operation, options include:

- A single contract for the operation of P&R bus services, site staffing, facilities management and maintenance of site buildings and infrastructure.
- A contract for the operation of P&R bus services, site staffing and facilities management, with maintenance of site buildings and infrastructure retained in-house or outsourced separately.
- Separate contracts for the operation of P&R bus services and for site staffing and facilities management.
- The fundamental commercial options for the operation of a P&R service are:
 - A charge for parking, with no additional charge for the bus service ('pay to park')
 - Free parking with a charge for the bus service ('pay to ride')
- Separate charges for parking and bus travel.

In contrast to bus fares, car parking charges are subject to VAT at the standard rate of 20%, which has to be allowed for when setting the parking charge and generally increases the cost to the user. It is thus generally more economical to operate P&R services on a 'pay to ride' basis.

Some P&R schemes, notably Cambridge and Oxford, have in the past operated systems requiring users to pay separately for parking and bus travel. These arrangements were found to have an adverse impact on patronage, leading to both schemes reverting to integrated ticketing for parking and bus travel. The experience of Cambridge and Oxford indicates that any commercial model requiring users to pay separately for parking and bus travel is highly undesirable and should be avoided.

Although the Truro P&R sites do attract significant usage for parking only, particularly parking at the Langerth site by staff employed at businesses on the Threemilestone Industrial Estate, it is challenging to find any cost-effective method of generating revenue from this activity that would not compromise the attractiveness of the service to its core target market. As long as parking for non-ride purposes does not compromise the availability of parking spaces for P&R users, this may have to be tolerated.

Contract and commercial model options are discussed further in section 5.5 below.

5.3 Cormac

We have considered the option of Cormac (part of Corserv, a company owned by Cornwall Council) as a potential supplier/operator for this service.

Cormac is a leading highways, environment and infrastructure company providing a wide range of specialist services in Cornwall and beyond. The company provides highways and environmental services involving the use of an extensive fleet of goods vehicles and plant machinery. Cormac Solutions Limited holds a Standard National Goods Vehicle Operator Licence in the West of England Traffic Area.

Cormac does not currently hold a Public Service Vehicle (PSV) Operator Licence and as an organisation has no experience of operating or maintaining a fleet of buses or of providing public or education transport services.

As long as Cormac does not hold a PSV Operator Licence it cannot practically be considered to be a potential operator for the Truro P&R service. However, as the holder of a Goods Vehicle

Operator Licence, Cormac should have the capability to meet the requirements for and apply successfully for a PSV Operator Licence should the company wish to enter the market for the provision of passenger transport services for hire or reward.

In the event that Cormac did obtain a PSV Operator Licence, the company would still be starting from a position of having no experience of providing passenger transport services and would incur significant set up costs to adapt depots and workshops, acquire vehicles and recruit staff in order to be in a position to provide such services.

Considering the scale and high profile of the Truro P&R service, the risks arising from the potential employment of a company with no prior experience of the provision of passenger transport services to provide the service would be significant and unlikely to be acceptable to Cornwall Council.

5.4 Contract and commercial model options

This section outlines the different contract and commercial models which could potentially be considered as options for the Truro P&R scheme.

Drawing on the case studies there are four broad options that could be considered:

- **Tendered service (current model for Truro P&R)** – Cornwall Council set the service requirements and go to the market to employ an operator to run the service, with the option to run the sites as well.
- **Commercial service** – An operator registers a service and sets the service hours, frequency, timetable and vehicle type. Cornwall Council run the sites and grant access to the operator. Potential for the Council to charge the operator for use of the sites.
- **Concession** – In the event of more than one operator expressing interest in the operation of a commercial service, the Council could seek bids for a concession granting exclusive rights to operate from the sites to a single operator in return for a premium payment to the Council.
- **Formal Partnership Agreement** – The bus service is operated commercially, but under a formal agreement between all involved partners setting out the obligations of each partner, the conditions and charges for access to the sites, and including provisions designed to ensure that quality standards are met. This option is suitable for use in scenarios involving more than one operator. Cornwall Council run the sites.

Under each option there are various ways in which contracts could be set up, and agreements made for an operator to serve the P&R sites. The two most significant factors influencing the options realistically available, and the selection of a preferred model are:

- The potential for the P&R bus service to generate a revenue surplus is a precondition for a commercial service, concession or partnership agreement.
- The level of control sought by the Council over the level and quality of the service provided by the bus operator.

Even if there is potential for a P&R bus service to be provided commercially, a local authority may prefer to tender for a higher level and/or quality of service than offered commercially by the market in order to meet their requirements for delivering a bus service that is sufficiently attractive to car users to elicit modal shift.

What does this mean for Truro P&R?

The size of the current financial gap between the income generated by the Truro P&R scheme and its operating costs precludes the consideration of any form of commercial model.

Based on the findings from the soft market testing reported in section 2.6, the only practical option for Cornwall Council in the short term is to continue to procure the Truro P&R service as a tendered service.

Within the context of a tendered service, there are two alternative forms of contract available:

- A **gross cost contract** (also known as a minimum cost contract)
- A **net cost contract** (also known as a minimum subsidy contract).

Under a gross cost contract, the operator is paid a specified sum to provide a specified service for a specified period, with all revenue collected returned to the council. However, this form of contract has a number of disadvantages, notably:

- The business risk of declining revenue due to falling passenger numbers lies with the council.
- The operator has no direct incentive to ensure revenue collection and the council must implement control and audit processes to ensure that all revenue is collected and returned.
- The operator is not incentivised to focus on the efficient operation of the service beyond contractual minimum standards, to contribute to the marketing and promotion of the service, and to deliver continuous improvement throughout the life of the contract.

Under a net cost contract, the operator is paid a fixed level of subsidy to provide a specified service for a specified period, with all revenue collected retained by the operator. This form of contract transfers patronage and revenue risks to the operator. It provides the operator with strong incentives to maximise ridership, both through marketing and promotion of the service and consistently delivering high standards of operation.

Gross cost contracts are generally most appropriate for services with low and/or uncertain levels of patronage and revenue. Net cost contracts become more attractive to both parties when there is evidence of a stable baseline revenue stream to inform the assessment of revenue risk. A perceived disadvantage of a net cost contract for a P&R service is that it does not generate an incoming revenue stream for the Council that can be used to find P&R site maintenance costs. However, this will be mitigated by lower tender prices reflecting the retention of revenue by the operator.

Operator incentives are still possible within the framework of a gross cost contract model, for example:

- An arrangement to share a proportion of the revenue generated over and above an aspirational target with the operator.
- A performance-based incentive that would offer the operator a contract extension, based on KPIs being achieved in the second half of the initial contract term.

In the responses to the soft market testing only one operator indicated that they would be open to bidding to operate the Truro P&R service on a net cost contract basis.

5.5 Options for revenue generation and cost savings

The report so far has provided a baseline of the current situation and context of Truro P&R and highlighted how other exemplar P&R sites operate, demonstrating how these approaches could be applied to the Truro P&R scheme.

There are several potential ways in which additional revenue could be raised or running costs could be reduced. A summary of these is provided in Table 5.1.

Table 5.1: Options for revenue generation and cost savings

Option	Description	Possible Revenue Impact and/or Cost Reduction	Pros	Cons
Selective reductions in bus service frequency	Service levels aligned more closely with variations in demand to reduce operating and maintenance costs, but maintaining 15-minute daytime frequency	A reduced frequency enables a reduction in the number of buses required, and therefore operating costs.	Aligning service provision with demand on Saturdays by providing a consistent 15-minute interval service throughout the existing operating hours of 0630 to 1930 would reduce the number of buses required to operate the Saturday service from six to four.	Reducing service frequency to below a 15-minute interval service is likely to make the service a less attractive and less convenient option and could reduce demand, and therefore revenue. Low demand and revenue risk if a minimum 15-minute interval service is maintained.
Pay to park	Charge users for parking on site whilst maintaining pay to ride arrangements	<p>This could be in the region of £1 a day (this was adopted briefly in Cambridge and previously in Oxford). It would have to consider the overall cost and convenience impact of paying to park and paying to travel versus parking in the city centre.</p> <p>Pay to park, ride free is not an appropriate option for a P&R service if, as in the case of Truro, there are a significant number of users who travel on the bus service without driving to a P&R site.</p>	<p>Those using the site pay a small fee to park, before boarding the bus.</p> <p>Will generate additional revenue from those currently using the sites for parking only.</p> <p>Would help to address current issue of car park being used for free by people not using the P&R but instead, walking from the site to other places (e.g., Threemilestone Industrial Estate).</p>	<p>Double charging (for parking and bus fare) is likely to deter use of the P&R service by its core target market.</p> <p>Considering current tariffs for parking in the city centre, it is unlikely to be attractive to users to pay to park and pay to ride. Likely impact is to drive down demand, and therefore the net revenue yield from a parking charge, with the risk of a negative overall revenue impact.</p> <p>There are additional costs in installing facilities to manage the system such as installation of ANPR, payment machines.</p> <p>Cambridgeshire County Council briefly introduced a parking fee at P&R sites (set at £1 per day) but this was removed in 2017 after only three years. It drove down demand significantly (around 20% reduction in demand since charge introduced).</p>

Option	Description	Possible Revenue Impact and/or Cost Reduction	Pros	Cons
Overnight parking charges	Allow the sites to be open 24 hours a day so that people can leave their cars there overnight	In Cambridge, across all six sites this generates approximately [REDACTED] annum. However, this would rely on the number of visitors to the city who are staying there overnight. This option not expected to have the same potential in Truro.	Sites could operate on a 24-hour basis, which would allow people to park overnight and pay to leave their cars there. This would generate revenue at a time when the site would otherwise be closed. Could be utilised by visitors who need somewhere to leave their cars, encouraging visitors to use the P&R site to access the city centre, helping to reduce congestion.	Relatively cheap and abundant parking in Truro city centre relative to Cambridge likely to mean people who are staying in Truro wish to leave their cars in a more central location than at a P&R site. Security of site becomes harder to manage if open 24 hours, and longer opening hours may require additional staffing which will come at an additional cost. Planning approvals may prevent/ or restrict this and would require further investigation.
P&R site used as a Travel Hub	Non-P&R services can use the site, providing interchange opportunities for people to switch services for onward trips to destinations outside Truro	Departure charges for non-P&R services.	Increase in use of site by users not arriving by car. Revenue could either be captured as part of a revenue sharing agreement with operator running the P&R service, or/as well as, departure charges levied on non-P&R services.	May require integrated ticketing to allow for seamless interchange and ease of use. May make the use of the site less attractive if those interchanging there have to use a service that stops more than once before arriving in the city centre.
Match Day/ sporting events	Use of part of the Langarth P&R site as an event car park when matches are held at the new stadium for Truro City FC planned for construction on a site adjacent to the Langarth P&R site	Potential to rent out part of the site for this use. Potential to charge a premium price for event parking.	Renting part of the site for this use would generate additional revenue which could contribute towards site operating and maintenance costs. The rental option would minimise any impact on normal P&R operations and site staffing. Improved utilisation of the Langarth site. P&R services could be used by people travelling to the Langarth stadium for a game, thus generating additional revenue from ticket sales.	Revenue is likely to be relatively small and from a practical perspective this requires consideration of how the P&R service would still function/operate in parallel to match day parking. Additional costs required to staff the site when operating in event parking mode. Suggest future work could be undertaken to understand match day numbers, how people travel to matches, and potential charging costs, considering availability of car parking elsewhere locally, and average costs.

Option	Description	Possible Revenue Impact and/or Cost Reduction	Pros	Cons
Markets / car boot sales	Use of site car parks used for alternative events such as markets and car boot sales when not in use for P&R services, for example on Sundays	Cambridge generates circa [REDACTED] a year from car boot sales across the P&R sites.	<p>Allows for the site to be utilised at less busy times, such as on Sundays when there is currently no P&R service.</p> <p>Doesn't necessarily require full site to be used. Events could be limited to areas that are surplus to capacity currently required to meet P&R demand, leaving other parts of the site to operate normally as P&R.</p> <p>Opportunity to offer use of the site itself and charge for additional facilities such as cycle storage/lockers.</p>	<p>Could mean loss of P&R revenue if car parking capacity reduced below demand to accommodate events.</p> <p>Requires additional time and effort to manage.</p> <p>May require changes to existing planning consents to permit new uses of sites.</p>
Limited hours of operation	Limiting operating hours for the terminal buildings	Reducing the operating hours would help reduce staffing and other operating costs. For example, option to only have the terminus building staffed during peak periods.	This would reduce staffing requirements and therefore costs.	A closed or unstaffed terminal building may deter users if there are no waiting area/customer facilities open during service hours.
Provision of additional commercial advertising space at sites	Installation of 6-sheet advertising poster frames in terminal buildings and high footfall areas around bus boarding points	Opportunity to generate additional advertising revenue through the existing concession.	Low-cost quick win opportunity to make use of currently unutilised space within the terminal building at the Langarth site.	<p>Advertising consent required for outdoor advertising.</p> <p>Landowner's consent would be required for installation of outdoor advertising poster sites at Tregurra site.</p>
Coffee vending machine concession	Machine rental or revenue share options available	<p>Potentially viable based on sales of a minimum of 30 cups per day per machine.</p> <p>The only cost to the sites would be the provision of a water, waste and electrical supply to the machine and the provision of fresh milk for the machine.</p>	<p>Attractive addition to the P&R service, improving customer facilities and waiting area. May help improve patronage as more facilities on offer for passengers using the site.</p> <p>Relatively simple way to help build up additional revenue without the need for increased staffing, and therefore increased cost (except maintenance staff on occasion).</p> <p>May be used by those using the site to park in addition to P&R users, thus capturing a wider market.</p>	<p>Maintenance could be an additional strain if an engineer was required for repairs and not provided under the agreement with the vending machine supplier. Would also require ongoing stock management and daily cleaning. However, potential for these tasks to be undertaken by existing site staff.</p> <p>Current policy of no food and drink to be consumed on the buses would need to be reviewed for this to be viable. Option for this to be changed, with appropriate regulations, such as those in Leeds (hot drinks allowed if they have a lid on).</p>

Option	Description	Possible Revenue Impact and/or Cost Reduction	Pros	Cons
Hire of meeting room at Tregurra site	Hire of the meeting room to organisations and community groups on a similar basis to the meeting rooms at Truro Library	The hire rate for a comparable room at Truro Library is [REDACTED] for a half-day session and £[REDACTED] for a full day. The full schedule of hire rates is available at: https://www.cornwall.gov.uk/libraries-museums-and-archives/libraries-your-local-library/truro-library/meeting-rooms-at-truro-library/	Potential to generate revenue from an underutilised part of the building. Meeting room is in an accessible location with the benefit of free parking. This could be publicised via the Cornwall Council website on a similar basis to the meeting facilities at Truro Library.	Requirement for staff to manage bookings and service the meeting room. However, potential for these tasks to be undertaken by existing site staff.
Solar panels and/or car ports	Installation of solar photovoltaic (PV) panels and/or car ports and battery energy storage to reduce the energy demand from the grid to provide power for the site buildings, lighting and services	Significant capital cost, but could deliver ongoing annual savings in energy costs over the economic life of the solar PV system.	Solar car ports enable installation of solar PV panels at scale above parking spaces with impact on parking capacity minimised. Benefits would be highly dependent on the site meteorological conditions and scope to retrofit solar car ports in positions that optimise their alignment relative to the sun. Site-specific feasibility studies would be required to quantify estimated costs and expected benefits.	Installation at Langarth site would require planning consent. Installation at Tregurra site would require both Landowner's consent and planning consent.
Use of electric buses	Replacement of the existing diesel bus fleet owned by Cornwall Council with electric buses	Additional unit capital cost per vehicle of [REDACTED] relative to equivalent new Euro VI diesel single deck buses. Estimated additional capital cost: • [REDACTED] for seven buses • [REDACTED] for eight buses Capital cost of [REDACTED] grid connections and charging infrastructure. Capital cost to Cornwall Council mitigated if ZEBRA 2 or other grant funding available for electric buses and charging infrastructure. [REDACTED] Ongoing annual savings in vehicle operating and maintenance costs.	Expected savings in vehicle operating and maintenance costs, plus profit element, would be captured in prices tendered by operators for use of electric buses. Significant environmental benefits in terms of reduced carbon and pollutant emissions. Benefits to passengers from lower noise levels and superior ride quality. Introduction of electric buses would also provide a platform for a marketing refresh of the service.	High capital cost to Cornwall Council. Financial savings in terms of tender prices expected to be in the region of 5%. Savings in vehicle operating and maintenance costs partially offset by additional costs for maintenance of charging infrastructure. This is a small financial saving relative to the scale of investment that Cornwall Council would need to make in the absence of grant funding, with a long payback period.

Option	Description	Possible Revenue Impact and/or Cost Reduction	Pros	Cons
		<p>██████████ the first year of operation for fleet of seven buses.</p> <p>Additional costs for maintenance of charging infrastructure estimated at ██████████.</p> <p>Estimate based on the energy consumption statistics, fuel and energy prices, BSOG rates and unit maintenance costs for diesel and battery-electric single deck buses applied in the Department for Transport's Greener Bus Tool (May 2023).</p> <p>Potential positive impact on revenue. Recent research findings indicate that people would be more likely to travel by bus if they knew that a zero-emission bus was available.</p>		

What does this mean for Truro P&R?

Table 5.1 shows that there are several options for generating additional revenue and cost savings. Although not all of these may be appropriate or viable to apply to Truro, it demonstrates that there are possibilities to generate additional revenue by utilising the P&R site for other purposes, subject to the limitations imposed by the existing planning permission and the lease agreement for the Tregurra site.

5.6 Revenue and cost impacts

Table 5.2 provides quantified estimates of the expected impact of the options discussed above and in earlier sections for changes to the current P&R bus service levels and hours of operation on the price tendered by operators for provision of the service.

Table 5.2: Cost estimates for variations to current P&R bus service

Option	Impact on peak vehicle requirement	Estimated impact on bus hours	Estimated cost (saving) per day of operation	Estimated annual cost (saving)
Align Saturday service with demand by providing a consistent 15-minute interval service throughout the existing operating hours	Peak vehicle requirement for Saturday service reduced from 6 to 4	Saving of 10.5 bus hours		
Introduce later Monday to Friday journeys on the Hospital Shuttle service PR1A for staff finishing work between 19:30 and 21:00	No impact	Cost of 1.7 bus hours		
Introduce a Monday to Saturday evening service operating every 20 minutes from 19:30 until 22:00 between Langarth P&R and city centre only	No impact	Cost of 5 bus hours		
Introduce a Monday to Saturday evening service operating every 20 minutes from 19:30 until 22:00 over the full PR1 route between Langarth P&R, the city centre and Tregurra P&R	No impact	Cost of 7.5 bus hours		
Introduce a Sunday service operating every 20 minutes between 09:00 and 17:00	3 vehicles required for Sunday service	Cost of 25.4 bus hours		

These estimates have been derived by taking the price per operating hour for service variations included in Schedule 2 to the current contract with First South West for the Truro P&R service and uplifting this by the ratio between the annual contract price in Schedule 2 and the average of the indicative annual prices provided for the first year of operation by the operators participating in the recent soft market test. This calculation produces an estimated cost of [REDACTED] per bus hour.

Based on the data available from the Greener Bus Tool for the Truro component of Cornwall Council's ZEBRA 2 funding application, the financial savings in vehicle operating and maintenance costs from introduction of a fleet of seven electric buses on the Truro P&R service in the first year of operation are estimated [REDACTED]. It is expected that these savings, plus a profit element, would be captured in prices tendered by operators for use of electric buses. Comparison with the average of the indicative annual prices provided for the first year of operation by the operators participating in the recent soft market test indicates that the financial savings in terms of tender prices are likely to be in the region [REDACTED].

The savings in vehicle operating and maintenance costs realised from the use of electric buses would be partially offset by the additional costs for maintenance of the charging infrastructure required to support their operation. These costs are estimated at £10k per annum.

The majority of the monetised benefits from introduction of electric buses on the Truro P&R service would be environmental benefits from reduced emissions rather than financial savings. The expected financial savings are small relative to the scale of investment that Cornwall Council would need to make in the absence of grant funding, with a long payback period. Accordingly, this is not an option that can be recommended from a financial perspective alone.

Table 5.3 provides indicative estimates of the level of revenue that could be generated from the three immediate opportunities identified for commercial initiatives at the P&R sites.

Table 5.3: Revenue estimates for commercial initiatives at P&R sites

Option	Basis for estimate	Estimated Annual Revenue
Installation of two 6-sheet advertising poster frames within the terminal building at the Langarth site	<p>Rates for 6-sheet advertising sites range from [REDACTED] per site for two weeks (source: billboardadvertising.org.uk).</p> <p>Maximum potential sales revenue per site per [REDACTED] on the average of the above rates is [REDACTED]</p> <p>Sites are sold for 39 weeks per year.</p> <p>Cornwall Council receive a 40% share of sales revenue in line with the existing contract with Ad-Smart.</p>	[REDACTED]
Coffee vending machine concession on a revenue share basis at Langarth and Tregurra sites	<p>Sales of 30 cups per day per site.</p> <p>Revenue share [REDACTED] per cup after all costs accounted for.</p> <p>Machines at two sites open for 305 days a year.</p>	£13,725
Hire of meeting room at Tregurra site	<p>The hire rate for a comparable room at Truro Library is [REDACTED] for a half-day session at [REDACTED] for a full day (source: https://www.cornwall.gov.uk/libraries-museums-and-archives/libraries/your-local-library/truro-library/meeting-rooms-at-truro-library/)</p>	Dependent on demand

5.7 Risks and mitigations

Table 5.4 provides a commentary on the risks associated with each of the main options set out in Tables 5.2 and 5.3 and the measures that can be taken to mitigate these risks.

Table 5.4: Risks and mitigations

Option	Risks	Mitigation
Align Saturday service with demand providing a consistent 15-minute interval service	Very low risk that this measure will not deliver the expected level of savings. Low demand and revenue risk if a minimum 15-minute interval service is maintained.	Include in service specification for new contract to ensure resource savings to operators are fully reflected in tender prices.
Later Monday to Friday journeys on the Hospital Shuttle service PR1A	Low affordability risk as cost can be fully funded by reinvesting the savings realised from the alignment of the Saturday service with demand. Very low demand and revenue risk as the option is directly targeted to cover shift end times for many hospital staff.	Implement and promote in partnership with RCH to coincide with start of building work that will displace parking for both staff and visitors and maximise potential for behaviour change.
Monday to Saturday evening service until 22:00 between Langarth P&R and city centre	Moderate affordability risk as more than one-third of cost can be funded by reinvesting the savings realised from the alignment of the Saturday service with demand. Low demand and revenue risk as option meets latent demand at shift end times for hospital staff, but also provides a P&R option for retail and hospitality sector staff working in the city centre and finishing after 19:30.	Include as an option in service specification for new contract to ensure competitive pricing. Promote in partnership with RCH and Truro BID.
Monday to Saturday evening service until 22:00 over full route	High affordability risk as less than a quarter of cost can be funded by reinvesting the savings realised from the alignment of the Saturday service with demand. Moderate demand and revenue risk as option is less well targeted at the sources of latent demand identified through stakeholder engagement.	Include as an option in service specification for new contract to ensure competitive pricing. Promote in partnership with RCH and Truro BID.
Sunday service	Very high affordability risk if introduced at same time as later evening service. High demand and revenue risk as there is little evidence of latent demand and city centre car parks are cheaper on Sundays.	Include as an option in service specification for new contract to test the market and keep this open as a longer-term option.
Installation of 6-sheet advertising poster frames within the terminal building at the Langarth site	No consent risk as advertising consent not required for indoor sites. Very low affordability risk as the proposed poster sites will make use of existing unutilised wall space. Low revenue risk as revenue has been estimated on a conservative basis and a revenue share in line with the existing advertising contract with Ad-Smart.	Negotiate the addition of these poster sites to the existing advertising concession.
Coffee vending machine concession on a revenue share basis at Langarth and Tregurra sites	Low affordability risk as supply and maintenance of vending machine and supply of coffee ingredients would be the responsibility of the concession operator. Low revenue risk as revenue and revenue share have been estimated on a conservative basis.	Advertise the concession and invite offers from local and national operators.

5.8 Timescales

At the time of writing, it is anticipated that the Truro P&R service will be re-tendered in May 2024, with a planned January 2025 start date for the new contract. In this context, timescales for the considered options are a look ahead to 2028 (long term), options for implementation from the start of or during the new contract (medium term) and options with potential for implementation during 2024 and independently from the procurement of the new contract (short term).

6 Conclusions and recommendations

This chapter draws together the themes and issues discussed in the previous chapters. Firstly, it presents a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis of the Truro P&R service. This is followed by recommendations developed to build on the strengths of the service and realise opportunities to improve its performance and sustainability, while addressing weaknesses and mitigating threats to its future success.

6.1 SWOT analysis

Table 6.1: SWOT analysis

Strengths
<ul style="list-style-type: none"> • P&R sites are well located on two of the three main approaches to Truro.
<ul style="list-style-type: none"> • Service effectively combines a P&R service with links to strategic destinations on the A390 corridor.
<ul style="list-style-type: none"> • Intermediate stops serving strategic locations have a clear purpose and don't materially increase journey times.
<ul style="list-style-type: none"> • 'Park for Truro' brand – conveys the message that the service is an integral part of the overall parking offer for Truro together with the environmental benefits to Truro of using the service.
<ul style="list-style-type: none"> • Strong and consistent branding across sites and vehicles. Route branding on vehicles with all stops featured.
<ul style="list-style-type: none"> • Vehicles are clean and well maintained.
<ul style="list-style-type: none"> • Overall quality of site facilities.
<ul style="list-style-type: none"> • Fares sensibly priced relative to cost of city centre parking considering need to generate revenue to contribute to financial sustainability of service.
<ul style="list-style-type: none"> • Pay to ride policy with pay on bus option enables non-P&R users to use the service for local journeys within Truro, generating additional revenue.
<ul style="list-style-type: none"> • Simple timetable with departures at regular clockface intervals.
Weaknesses
<ul style="list-style-type: none"> • Limited bus priority measures on A390 corridor, leading to high level of bus journey time variability.
<ul style="list-style-type: none"> • Service offers no journey time advantage over car travel to city centre.
<ul style="list-style-type: none"> • High number of on-bus ticket transactions impacts on boarding and stop dwell times.
<ul style="list-style-type: none"> • P&R buses delayed in city centre by circulating vehicles searching for free on-street parking.
<ul style="list-style-type: none"> • Limited marketing and promotion of service with no long-term marketing plan.
<ul style="list-style-type: none"> • Recent marketing activities have not delivered measurable results.
<ul style="list-style-type: none"> • No service after 19:30 on Mondays to Saturdays, on Sundays and public holidays.

Weaknesses

- Site staff provided by operator are customer service staff/caretakers, not supervisors, and not empowered to instruct drivers or regulate operation of service.
- Current contractual arrangements do not incentivise the operator to improve service performance beyond contractual standards or contribute financially to marketing and promotion of service.
- Design of sites with extensive landscaping and planting contributes to high maintenance costs.
- Existing planning permissions include time and activity-based restrictions on permitted use of P&R sites.
- No P&R site on southern approach to Truro.

Opportunities

- Bus Service Improvement Plan (BSIP) funding allocated to deliver further bus priority measures on the A390 corridor.
- Align service provision with demand on Saturdays by providing a consistent 15-minute interval service throughout the existing operating hours and reinvest savings.
- Building work at RCH Treliske commencing July 2024 impacting on parking capacity
- Introduce later Hospital Shuttle journeys for RCH Treliske staff finishing between 19:30 and 21:00.
- Extension of Monday to Saturday operating hours to 22:00.
- Introduce Sunday service.
- Withdraw or phase out the current 50% discount on day tickets on Saturdays to increase revenue.
- Increase discount offered to customers purchasing multi-journey tickets to attract, encourage and reward regular users.
- Install 6-sheet advertising poster sites in P&R terminal buildings and high footfall areas around bus boarding points to generate additional advertising revenue.
- Investigate viability of introducing a coffee vending machine concession at the P&R sites on a revenue share basis.
- Hire of the meeting room at the Tregurra site to organisations and community groups on a similar basis to the meeting rooms at Truro Library.
- Include patronage and performance incentives for the operator in the new P&R contract.
- Increased and more effective targeted marketing and promotion of service to drive patronage growth.
- Develop a multi-year marketing plan for the Truro P&R service for implementation over the life of the new P&R contract.
- Design marketing campaigns to include features that will aid measurement of their effectiveness.
- Develop a dedicated Park for Truro website.

Opportunities

- Introduce electric buses at next fleet renewal to deliver decarbonisation of service, local air quality benefits in Truro AQNA and reduce vehicle operating and maintenance costs.
- Include enhanced accessibility standards in specification for future new P&R vehicles.
- Refresh the parking strategy for Truro to support sustainable transport modes over private cars.
- Increase the cost of parking in Truro relative to P&R fares.
- Planned development at Langarth Garden Village.
- Extend the P&R service beyond the existing Langarth site into the new Garden Village development.
- Introduce solar panels on the P&R sites to help raise revenue to contribute towards operating and maintenance costs.

Threats

- P&R patronage recovering but remains significantly below pre-pandemic levels, posing a threat to the financial sustainability of the service.
- Long-term impact of shift from office-based to hybrid working on patronage may mean previous users do not fully return and new users need to be attracted to use the service.
- Bus industry cost inflation at levels exceeding general inflation driving above-inflation increases in tender prices as indicated by soft market testing.
- Bus operators experiencing staff recruitment and retention challenges leading to upward pressure on pay rates for operations and maintenance staff.
- Traffic congestion is a threat to the reliability of the service, and in the longer term the cost of operation if an additional vehicle is required to maintain the current level of service.
- Proposal to introduce discounted parking tariff for local residents.

6.2 Recommendations

Recommendations are presented in three categories:

- **Short term** – measures with potential for implementation during 2024 and independently from the procurement and implementation of the new Truro P&R contract.
- **Medium term** – measures requiring consideration in the procurement of the new P&R contract. Potential to implement from the start of, or during the life of, the new contract.
- **Long term** – measures linked to or dependent on the implementation of other strategies and plans, with potential to implement within a time horizon up to and including 2028.

Short term

Table 6.2: Recommendations - short term

Recommendation	Reasoning
<ul style="list-style-type: none"> • Withdraw or phase out the current 50% discount on day tickets on Saturdays at next fares revision planned for April 2024. 	<ul style="list-style-type: none"> • This discount was introduced as a promotional offer. There is no clear logic for a permanent deep discount on day tickets on Saturdays as car park tariffs in

Recommendation	Reasoning
	<p>Truro city centre are the same on all days of the week.</p> <ul style="list-style-type: none"> Patronage data indicates that deep discounting of day tickets on Saturdays is ineffective in generating additional patronage. Cornwall Council are foregoing revenue that could be raised to improve the financial sustainability of the service or fund other recommended service improvements.
<ul style="list-style-type: none"> Adopt a basket of fares approach when implementing fares revisions, rather than applying a standard inflation-linked increase to prices for all ticket types. Consider increasing the level of discount offered to customers purchasing multi-journey tickets to attract, encourage and reward regular users 	<ul style="list-style-type: none"> The current levels of discount offered on 5-day tickets (9.1%) and 20-day tickets (13.6%) are relatively low compared to typical levels of discount offered for multi-journey bus tickets. More attractively priced multi-journey tickets will support retention of existing regular users and encourage casual users to use the service more frequently. There is potential to price multi-journey tickets more competitively with the price of staff parking permits at RCH Treliske. Increasing app-based sales of multi-journey tickets will reduce the number of on-bus transactions. This will reduce bus boarding times and contribute to improving service reliability.
<ul style="list-style-type: none"> Introduce later journeys on the Hospital Shuttle service PR1A for staff finishing work between 19:30 and 21:00 on a trial basis from July 2024 to coincide with the commencement of the extensive building work that will displace parking for staff and visitors. Work with the RCH Treliske management to promote this service directly to hospital staff, with an incentive to encourage trial of the extended service. 	<ul style="list-style-type: none"> Hospital staff and visitors are the strongest latent market for the Truro P&R service. The building work at RCH Treliske impacting on parking for staff and visitors provides a time-limited opportunity to introduce later services for hospital staff at a point when staff may need to change their existing travel behaviour. Later journeys on the Hospital Shuttle service PR1A can be introduced at marginal cost and require the use of only one bus.
<ul style="list-style-type: none"> Install 6-sheet advertising poster frames within the terminal building at the Langarth site, using the wall space previously occupied by ticket vending machines. Negotiate the addition of these poster sites to the existing advertising concession. 	<ul style="list-style-type: none"> This is a low-cost quick win opportunity to make use of currently unutilised space within the terminal building at the Langarth site to generate additional advertising revenue through the existing concession.

Recommendation	Reasoning
	<ul style="list-style-type: none"> As the sites are within the building, it should not be necessary to obtain advertising consent for these poster sites.
<ul style="list-style-type: none"> Engage with coffee vending machine suppliers and site operator regarding the practicality and viability of introducing a fresh coffee vending machine concession at the P&R sites on a revenue share basis. 	<ul style="list-style-type: none"> A concession based on a revenue share model would involve no up-front cost other than the provision of a water, waste and electrical supply. Negotiation with the site operator would be required as the site staff would need to restock and clean the vending machine as part of their daily duties.
<ul style="list-style-type: none"> Offer hire of the meeting room at the Tregurra site to organisations and community groups on a similar basis to the meeting rooms at Truro Library. 	<ul style="list-style-type: none"> This is an opportunity to make use of currently underutilised space within the terminal building at the Tregurra site to generate additional revenue. The existing arrangements for meeting room hire at Truro Library provide a model for this.

Medium term

Table 6.3: Recommendations - medium term

Recommendation	Reasoning
<ul style="list-style-type: none"> In the service specification for the new P&R contract, align service provision with demand on Saturdays by providing a consistent 15-minute interval service throughout the existing operating hours of 06:30 to 19:00. 	<ul style="list-style-type: none"> Demand between 08:00 to 09:30 and from 16:00 to 18:00 on Saturdays is lower than between 09:30 and 16:00. There is no logic for providing a more frequent service on Saturdays at times when demand is lower than between 09:30 and 16:00. This will reduce the number of buses required to operate the Saturday service from six to four and enable bidders for the new contract to reflect the associated saving in operating costs in their tenders. This change is expected to have minimal impacts on patronage and revenue, thus generating a net improvement in the financial performance of the service.
<ul style="list-style-type: none"> Include options for the provision of later evening services in the service specification for the new P&R contract and request pricing of these options as add-ons to the core service specification. Options for pricing could include: Later evening journeys on the Hospital Shuttle service PR1A only. 	<ul style="list-style-type: none"> This will enable decisions to be made regarding the extent of evening service provision and the timing of the implementation of any extension to the existing hours of operation with full knowledge of the associated costs and (if implemented) the results of the trial of later journeys on the Hospital Shuttle

Recommendation	Reasoning
<ul style="list-style-type: none"> Later evening journeys between Langarth P&R and city centre only, with only Langarth site operating hours extended. Later evening journeys over the full route, with both Langarth and Tregurra site operating hours extended. 	<p>service PR1A proposed as a short-term initiative.</p>
<ul style="list-style-type: none"> Include patronage and performance incentives for the operator in the new P&R contract. For example: An arrangement that would share a proportion of the revenue generated over and above an aspirational target with the operator. A performance-based incentive that would offer the operator one or more contract extensions of at least one year, based on KPIs being achieved in the second half of the initial contract term (when complacency might otherwise set in). 	<ul style="list-style-type: none"> As P&R patronage is still recovering from a low point during the Covid-19 pandemic, this is not the right time to move to a net cost contract model. Operator incentives are still possible within the framework of a gross cost contract model. Including incentives for the operator in the new P&R contract mitigates the greatest disadvantage of a conventional gross cost contract, while enabling Cornwall Council to retain all additional revenue generated from short term initiatives and underlying growth.
<ul style="list-style-type: none"> Develop and launch a dedicated Park for Truro website in partnership with the new contractor (similar in concept to cambridgeparkandride.info and parkandride.portsmouth.gov.uk) to provide one-click access to comprehensive information on sites, parking, times and prices. Operator to be responsible for maintaining website with details of service updates and planned disruption to normal service. 	<ul style="list-style-type: none"> The existing Park for Truro webpages on the Cornwall Council website do not present information about the service in the most logical order, with undue emphasis on changes to ticketing arrangements and expiry dates of multi-journey tickets made between 8 and 11 months ago. A well-designed dedicated website will be a cost-effective way of raising the profile of the Truro P&R service and will provide a channel to support other marketing initiatives.
<ul style="list-style-type: none"> Develop a multi-year marketing plan for the Truro P&R service for implementation over the life of the new P&R contract and allocate an annual marketing budget of a size sufficient to deliver the planned initiatives. The plan should include targeted tactical marketing activities using both electronic and printed media, with campaigns timed to coincide with the start of the new contract and any subsequent introduction of new vehicles and/or service enhancements. 	<ul style="list-style-type: none"> Sustained investment in well planned and targeted marketing is essential to improve the financial sustainability of the service. Well planned and executed tactical marketing activities should generate a payback in additional revenue of two to three times their cost.

Recommendation	Reasoning
<ul style="list-style-type: none"> ● Campaigns should also be designed to include features that will aid measurement of their effectiveness. 	
<ul style="list-style-type: none"> ● Provide an additional layer of advance highway signage on the main approach routes to the P&R sites. 	<ul style="list-style-type: none"> ● Providing advance signage from points more distant from the P&R sites will give travellers more time to digest that a P&R option is available for their journey before reaching a decision point. ● Best practice is to provide at least two advance signs plus directional signage on the immediate approaches to each site.
<ul style="list-style-type: none"> ● Adopt a more strategic approach to setting P&R prices and car parking tariffs that will make use of P&R more progressively more attractive relative to the cost of long stay parking in Truro city centre. ● Consider a policy that would not support the provision of new public car parking facilities that would increase car parking capacity in Truro city centre. 	<ul style="list-style-type: none"> ● Noting the concerns expressed about the impact of raising parking charges in the city centre on lower-paid commuters from Truro's hinterland, changes to parking tariffs should be made gradually and sensitively, considering overall trends in the cost of living. ● Raising long stay charges can help to improve the supply of short stay parking by increasing the turnover of spaces within existing car parks.

Long term

Table 6.4: Recommendations - long term

Recommendation	Reasoning
<ul style="list-style-type: none"> ● Keep open the future option of extending the operation of the Truro P&R service to Sundays, with services operating between 09:00 and 17:00 to cover the core shopping hours in Truro city centre. 	<ul style="list-style-type: none"> ● The introduction of a Sunday service is not recommended as a short- or medium-term measure as we consider that the provision of later evening services should be prioritised and that the cost of providing a Sunday service would not be affordable to Cornwall Council in the context of current levels of P&R patronage and revenue. ● Improving the overall financial performance of the service should be prioritised over introduction of a Sunday service, which would have the opposite effect in the short-term.
<ul style="list-style-type: none"> ● Investigate the potential for and benefits of extending the Truro P&R service beyond the Langarth P&R to serve the early phases of new development at Langarth Garden Village. 	<ul style="list-style-type: none"> ● This could be a cost-effective interim or longer-term solution to provide a one seat ride from the new development into Truro city centre. ● It could also discourage new residents from driving to the Langarth P&R site if

Recommendation	Reasoning
	<p>the same service is available from a stop close to their home. This could then avoid or reduce the need for and cost of building and maintaining more P&R spaces at Langarth.</p>
<ul style="list-style-type: none"> • Prior to the future re-procurement of the Truro P&R contract for the period beyond the end of the new contract planned to commence in January 2025, re-evaluate the option of moving from a gross cost contract to a net cost contract, considering patronage and revenue levels and trends at that point in time. 	<ul style="list-style-type: none"> • If P&R patronage has stabilised during the period of the new contract planned to commence in January 2025, this will make a net cost contract a more attractive option for both Cornwall Council and prospective operators. • Prospective operators will be more willing to take the revenue risk on a future contract if there is evidence of a stable baseline revenue stream.
<ul style="list-style-type: none"> • Keep open the future option of a southern P&R site. 	<ul style="list-style-type: none"> • The development of a southern P&R site is not recommended in the short- or medium-term as developing and improving the performance of the existing sites and service should be prioritised. • There is a strategic logic for a southern P&R site, but this would require introduction of a new bus route to serve it.

