Mid Sussex District Council

Parking Strategy Refresh – Phase 1 Report

November 2019

Prepared by

Contents

1. Introduction

Parking Matters Ltd (PML) have been commissioned by Mid Sussex District Council (the Council) to assist in the production of a refreshed draft Parking Strategy and associated Action Plan. This will be presented to Members of the Council with the objective of adopting a final strategy after March 2020.

This report summarises the technical work undertaken during the first phase of the project and includes a short consideration of the wider parking context, local policy, the current parking estate, and current operational context within the District.

We have tried to avoid reproducing large amounts of text or content from other sources; these are referred to within the relevant sections.

1.1 Why Manage Parking?

Car parking space is a finite resource; private cars only spend an estimated 3-4% of their time in transit, with 80% of their time parked at home and the remaining 16% parked at a destination[1].

A typical parking bay takes up around 12m^2 of space[2] and when circulation, entrances/exits and ramps are accounted for, this increases to around 23m^2 for surface car parks and over 32m^2 per space for multi-storey car parks. Meanwhile, towns and cities are getting denser[3], putting more strain on parking availability.

Parking is important to local communities, helping residents and visitors to access businesses and services and to support local economies. For local authorities, off-street parking is an important asset providing a tool for town centre management and revenue to deliver important services within the limits set out by national legislation[4].

If the asset is poorly managed, car parking can have a detrimental impact on how towns and cities look and function; encouraging traffic, contributing to a poor townscape and costing significant amounts of money to maintain. 'Cruising' for parking can generate vehicle mileage as users search for spaces, generating congestion and contributing to emissions[5] . Figure 1 illustrates our understanding of these factors and how a Parking Strategy should work to achieve a balance between economy, townscape, income and sustainability.

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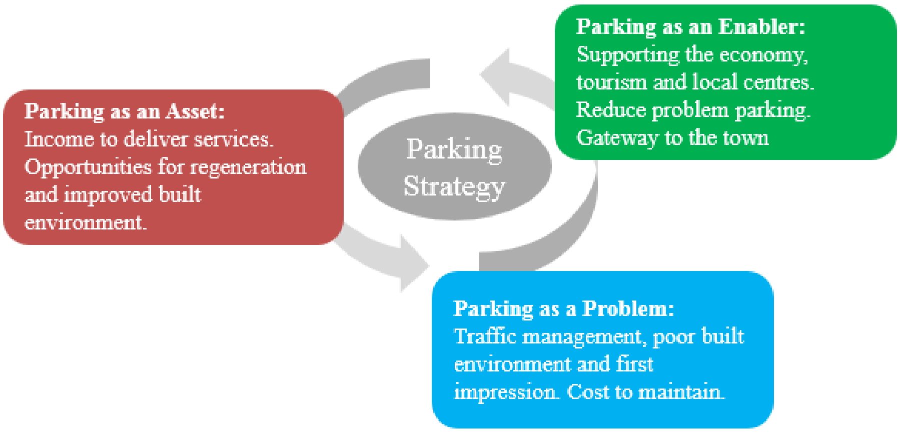
[1] RAC Foundation. July 2012. Spaced out: perspectives on parking policy http://www.racfoundation.org/research/mobility/spaced-out-perspectives-on-parking
[2] Northern Ireland Government. May 2017. Parking Standards, General Considerations. https://www.planningni.gov.uk/index/policy/supplementary_guidance/spg_other/parking/parking_standards_considerations.htm
[3] Smith, Duncan. August 2015. The rebirth of Britain's inner cities, mapped. http://www.citymetric.com/skylines/rebirth-britains-inner-cities-mapped-1356
[4] British Parking Association. August 2011. Parking Practice Notes, p10. http://www.britishparking.co.uk/write/Documents/Library/ppns/PPN1%20-%20Charging%20for%20Parking%20-%20Aug%202011.pdf
[5] Shoup, Donald. 2007. Cruising for Parking. http://shoup.bol.ucla.edu/CruisingForParkingAccess.pdf

Figure 1: How a parking strategy should balance wider objectives



1.2 Overriding Principles

The Council have set out their overriding principles for the work in the brief and these were confirmed at the inception stage and through the Officer Working Group (OWG). In brief they are to:

- support the Council's key strategies, the District Plan, Site allocations DPD, Haywards Heath Town Centre Masterplan and the Economic Development Strategy;
- support sustainable growth and the Economic Development Strategy; make the best use of available technologies to manage the environmental impacts of car usage and protect the Council's financial position by ensuring the service provides best value.

Other objectives are set out in Table 1. While the work will consider these, it may be for the action plan to set out how these will be tackled in more detail during subsequent projects that will follow on from the wider high-level strategy.

Table 1: Objectives for the Strategy Refresh

Theme	Objectives
Support for sustainable growth: (Policy)	Influencing driver behaviour: Differential charging. Parking restrictions. Responding to evening economy demands. Management of larger village car parks. Charging and enforcement. Managing and developing the car park portfolio: Disposal of sites, re-provision. Acquisitions and investment
Environmental Management: (Estate)	The role of car parks signage and digital solutions in improving air quality Electric Vehicle Charging provision
Technology – digital: (Technology)	Use of technology to manage parking – e.g. 'parking apps', payment platforms and VMS Alternative payment/enforcement options – e.g. ANPR, and Pay-on-Exit
Financial	Strategies to pre-empt and mitigate any financial impact arising from current approach Soft Market testing of enforcement Future parking management and enforcement arrangements Develop an Asset Management and Investment Plan Review of policies and managing franchises, licensing, neighbour construction

1.3 The Project Team

The project is being led by several key officers within Mid Sussex District Council whose local knowledge and experience are absolutely invaluable. The project will be shaped by Councillor and Officer views through regular working groups in each phase. This is supported by PML, an expert parking consultancy having provided advice in the UK and abroad to both public and private sector clients for many years. We are proud to offer some of the most accomplished and knowledgeable experts from across the parking industry in the country bringing a combination of expertise to the parking agenda including property, strategy, technology and operations and a huge amount of experience in delivering for local authorities.

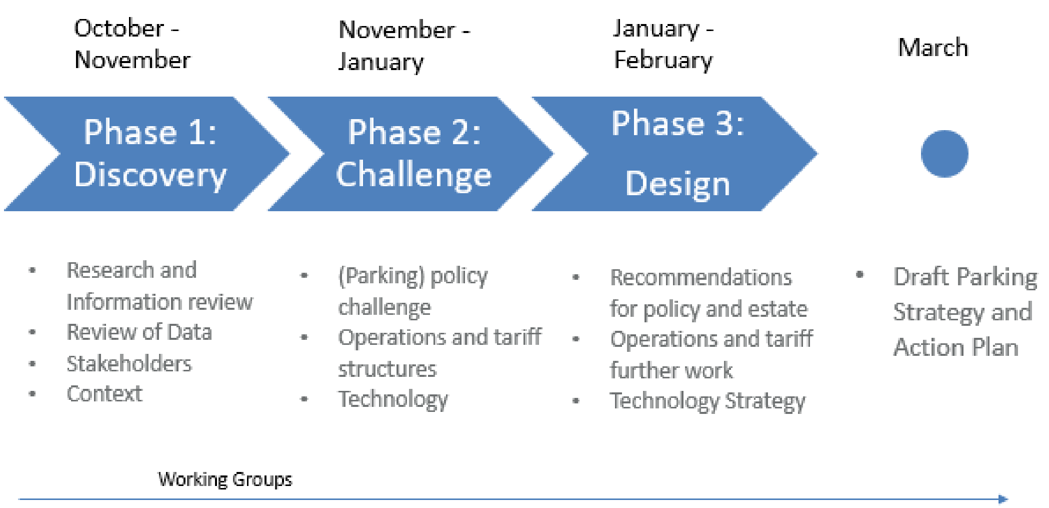
1.4 Methodology

The project to refresh the Parking Strategy will finish in March 2020 across three phases as follows:

- **Phase one**: Discovery. Will set a baseline for the project, undertake desk-based research, review existing data and information and set out the wider parking context not just in parking, but town centre policy, connected vehicles, and local development plans to consider the wider context within which the strategy must work within.
- **Phase two:** Challenge. This phase will focus on challenging the existing policies and operations currently in place but with an emphasis on partnership working and finding opportunities for improvement. The wider policy context will be considered including how parking supports sustainable economic growth, environmental management, providing good customer service and consideration of national evidence and best practices including operations, estate and technology.
- **Phase three:** Design. Will include the formulation of strategic recommendations for the Districts' parking services for the next ten years by focussing on the future of parking in the study area. We will start with the conclusions of previous stages and use relevant work undertaken by the Council including growth and regeneration plans for the when developing recommendations.

The refreshed parking strategy will be aligned with the Corporate Plan and recommendations will take account of the numerous external drivers for change that are likely to transform parking over the period covered by the strategy.

Figure 2: Methodology



2. Mid Sussex

Policies and strategies that relate to the District's parking policy need to be considered to provide the operational framework. We have tried to keep this as brief as possible as there is little value in repeating large amounts of information that can be found in the source material, as referenced throughout.

Mid Sussex is a mid-sized rural District (135th largest of 317) with a population estimated at 149,716 in 2018[6]. The District is located within the county of West Sussex and has excellent transport links to London, Brighton, towns along the south coast and Gatwick Airport (it sits within the 'Gatwick Diamond' Local Enterprise Partnership Policy area). The London to Brighton mainline and the A23 dissect the district north-south with poorer east-west links.

Mid Sussex has a good ranking on the Indices of Multiple Deprivation and performs well against most national surveys and indices for health and quality of life[7]. Of the District's population, around 62% live in three main towns with the remainder in a range of smaller settlements[8]. Employment levels are higher than the national average, with over 50% of the population economically active[9]. Mid Sussex has a higher proportion of over 65's than most Districts at around 18% of the population. This forecast is likely to increase to 21% by 2021.

The District benefits from a great deal of protected countryside; the High Weald AONB to the north and the South Downs National Park to the south.

This prosperity to other major urban centres, connectivity, environmental constraints along with forecasted growth present challenges which are outlined in the District Plan and Housing affordability, especially for young people; an infrastructure deficit; and relatively high out-commuting impacts on transport and environment.

2.1 Travel to work and car ownership

There are relatively high levels of vehicle ownership in Mid Sussex with 86% of households with access to a car or van compared to only 81% nationally[10]. There is little variation between the towns although Haywards Heath has marginally more households without a car. Higher availability of cars or vans in rural areas reflects the national trend.

Figure 3: Car Ownership in Mid Sussex (Source, ONS Census Data)

2011	West Sussex	Mid Sussex	Burgess Hill	East Grinstead	Haywards Heath	M. Sussex Rural	South East	England
Total Households	345,614	57,409	12,126	11,221	14,562	19,500	3,555,463	22,063,368
No access to a car or vans (%)	17.8	13.6	15.2	15.1	16.4	9.7	18.6	25.8
Access to a car or van (%)	82.2	86.4	85.2	84.8	83.6	90.4	81.4	74.3
Cars / vans per household (no.)	1.34	1.46	1.4	1.42	1.29	1.65	1.34	1.16

The change between the 2001 and 2011 census shows an increase in the number of households with access to a car, and in the number of cars (+1.2%); and an increase of cars per household (0.04). Burgess Hill and East Grinstead have seen a very slight increase in the number of households without access to a car (0.3% and 0.5% respectively).

[6] ONS, Mid-year Population Est. 2018
[7] Adopted District Plan, 2014-2031
[8] 2011 National Census
[9] Economic Development Strategy, 2018
[10] ONS, 2011 and 2001 census

As in most parts of the County travel to work by car or van dominates, but with significant variations. Travel to work by train (12.7%) is very high compared to the English (5.2%) or South East regional average (7%) and accounts for nearly 20% of travel to work in Haywards Heath. This contrasts with much lower bus usage, which is 1.5% in Mid Sussex, compared to 7.3% for England.

High car ownership creates congestion and air quality issues and of course, these vehicles need to park at their destinations. So, if parking is not properly managed and controlled this can cause further congestion in the District's town centres. The high travel to work by rail creates linked journeys, and through discussions with stakeholders and the Working Groups it is clear that commuter railway parking is an issue frequently highlighted by residents.

Whilst there are some large employers in the District (for example American Express and 1st Central Insurance), there is a net outflow of around 12,000 commuters a day with 20,000 coming in and 32,000 commuting out of the District each day. The proportion out-commuting rises in the three main towns and around mainline railway stations[11]. In comparison to Crawley (net of 24,000 in) and Brighton (net of 5,400 out), this has implications on the type of parking required.

2.2 Vision and Priorities

The vision for Mid Sussex as set out in the **2012 Mid Sussex Sustainable Communities Strategy** is:

"A thriving and attractive District, a desirable place to live, work and visit. Our aim is to maintain, and where possible, improve the social, economic and environmental well-being of our District and the quality of life for all, now and in the future."

Key economic priorities are:

- to support the regeneration and renewal of the three town centres so that they can be "thriving retail, leisure and commercial hubs each with their own distinctive character";
- to safeguard the economic resilience of the District; and,
- to create jobs in towns and villages to minimise the need to travel to other areas and give people access to jobs, shops and leisure facilities close to home.

Four priority themes sit within the **Economic Development Strategy 2018 – 2031.** These aim to deliver a vision to make Mid Sussex a *"vibrant and attractive place for business and people to grow and succeed"*, which are:

- **Place**-, to deliver viable and vibrant centres as well as business parks and transport infrastructure;
- **Premises**-, to ensure a supply of premises that meets demand including economic clusters, and hotels;
- **Peopl**e-, matching skills with jobs and supporting education and training; and,
- **Promotion**,- encouraging retention and growth by recognising natural and heritage assets.

Parking provision is identified under the 'place' theme as part of the toolset to achieve this vision in the Economic Development Strategy. An objective to improve the provision of parking for businesses in towns and business parks is included in the Action Plan as well as an action to refresh the Council's Parking Strategy, which is one of the main drivers behind this work. A KPI is also proposed to increase the number of car park visits over two hours in order to measure dwell time. A Supplementary Planning Document to ensure adequate parking provision is also proposed.

The parking estate and how parking is managed can support these objectives. Use of parking to its fullest potential, either through re-use or improvement can support regeneration and renewal, and appropriate tariffs and management can support the town's economies.

[11] DataShine.org (ONS 2011 Census Data)

2.3 Mid Sussex District Plan 2014-2031

The **Mid Sussex District Plan** supports the highlighted issues in the other policy documents and research discussed above, namely; out-commuting, a high-quality landscape which constrains growth, housing affordability, traffic and transport congestion, and, a strong and resilient economy.

The District Plan sets a minimum housing provision of 16,390 homes in the 17-year period between 2014 and 2031 and sets out how a rolling five-year land supply will be maintained. The focus of the development is on the three 'tier one' settlements, which are set to supply 10,650 houses over the plan period. The tier two settlements (including Cuckfield, Lindfield and Hassocks) are allocated 3,000 between them, tier three (including Ardingly and Horsted Keynes), 2,200; with the remainder coming from other settlements and windfall development forecasts based on previous years.

The implications for each of the towns is discussed in their relative sections, although it is worth noting that the biggest implications on any single town are the strategic allocations for Burgess Hill which allocate over 4,000 homes to the town within planned urban extensions.

2.4 Car Parking is recognised as having an important role to play in supporting the delivery of the District Plan vision. The impact of new development on parking is a key consideration when determining planning applications. West Sussex County Council Local Transport Plan

The **Local Transport Plan** (LTP) set out investment and policy priorities for West Sussex from 2011 to 2026. Briefly of note the LTP highlights:

- the impact of development in Burgess Hill and Haywards Heath on the transport network and parking;
- the issues raised in East Grinstead with regards to through-traffic;
- a lack of permeability for traffic across rail lines, especially in Burgess Hill;
- that HGVs are often diverting through rural settlements to avoid disruption on the main roads;
- that walking and cycling provision across the District are inadequate and need to be improved; and,
- bus services are seen as infrequent, unreliable, and expensive and are suffering a decline.

County wide policies relating to parking include ensuring that off-street and on-street complement each other to reduce the impact of visitor and commuter parking, reduce delays caused by bad parking through enforcement, and effective parking restrictions around stations.

The first phase has included discussions with the county council. The outcome of these is discussed in the relevant section. The second phase of the work will consider the relationship between on and off street in much more detail.

2.5 Implications for the Parking Strategy

The Parking Strategy must support these wider policy objectives by:

- Recognising the priority for townscape and place improvements in the Neighbourhood Plan;
- Supporting the Economic Development Strategy in supporting access to businesses and regeneration and potentially encouraging longer dwell times in the main towns;
- Responding to the implications of growth set out in the Local Plan, including supporting growth and where possible, perhaps considering sites for housing to tackle the Districts affordability needs; and,
- Help to maintain and strengthen the link between on and off-street parking set out in the Local Transport Plan as well as form part of a wider sustainable travel and demand management agenda.

3. Parking: Wider Context

Technological innovation, societal and demographic change are transforming the way we work, spend our leisure time, travel and shop. Those same forces will also transform how we own and use cars, and consequently the way we park.

The projected growth in population and an increase in housing provision would normally be expected to increase congestion and the demand for parking. However, young adults in Great Britain are driving less now than young adults in the early 1990s[12]. This may be the start of a social change that will reduce car use in the future.

3.1 Changes to Town Centres

Town centres are changing, changes in retail make the economic environment more challenging for retail based town centres. There are broadly two ways for parking to respond; firstly, a race to the bottom, reducing parking fees and increasing demand in an attempt to lure drivers back-in; and secondly, to re-invent town centres as places for people, leisure and enjoyment, supported by appropriate tariffs and time limits[13]. Car parking is clearly only one aspect of a complex interplay of factors influencing willingness to travel to town centres, as shown in Figure 4.

Figure 4: Factors influencing the success of a town centre (Re-Think! Parking on the High Street Report)

[12] Young People's Travel – What Changed and Why – The Centre for Transport & Society, UWE Bristol, Transport Studies Unit, University of Oxford
[13] Springboard. 2013. Re-Think! Parking on the High Street Report

Reducing car parking charges is unlikely to have the desired effect, bringing with it the negative aspects of a poorly managed parking estate without the desired uplift in visitors. Town and city centres require the sort of re-invention that has already happened in many of the UK's largest successful cities and is well underway in many towns across the country. With denser development trends come demands for more diverse town centres; places that offer the benefits of higher densities including diversity and freedom, cultural experience, convenience and places to meet and enjoy.

The car parking offer needs to support the District's vision of a thriving and attractive place, a desirable place to live, work and visit. To do this, the District needs to attract visitors, shoppers and employers to its towns. Changing customer expectations and the changing role of technology provide both opportunities and threats, as connected vehicles help users to make more informed choices about their destinations.

3.2 Car Park Tariffs and Charging

Car park charges are often perceived, particularly amongst businesses, as being a key determinant for changes in footfall levels in town centres. Over three-quarters of the business owners/workers interviewed for the Welsh Government research suggested that car parking options have an impact on the number of people coming into the town centre and therefore on their custom[14].

Beyond the anecdotal, there is very little published evidence which links changes in car park charges to changes in town centre footfall. Most research generally concludes that the general availability of spaces is felt by visitors to be more important than cost in their overall decision about visiting[15].

Re-Think! outlines research into the impact of the number of spaces and the cost of parking for the first two hours on the prosperity of town centres. A two-hour duration was chosen to separate shopping trips from commuter trips. The study did not consider any other factors relating to car parking that could have an impact on the performance of town centres, such as location of parking and the quality of the space.

The Re-Think! report found that whilst there is a link between the quantity of parking and footfall, this suggested that the level of provision in town centres is generally where it should be rather than that increasing available parking would increase footfall. It also concluded that the relationship between the cost of parking and footfall is less clear. Business owners believe that as cost increases, footfall decreases, but as shown below, the towns/cities, with the highest footfall generally have higher than average parking charges.

[14] http://www.senedd.assembly.wales/. Impact of Parking Charges on Town Centres, 2015

[15] Atkins. The effect of Parking Policy in England: Stage 1 Final Report

Figure 5: Source, Springboard Research Ltd and Parking Data & Research International

Whilst towns with lower footfall generally charge less for parking this does not suggest that raising parking charges will increase or decrease footfall but implies that the cost of parking in the town centre is a lower priority when deciding on a destination than other factors. This is further evidenced when comparing the quality of the offer with footfall; simply, as the quality of the offer improves footfall increases.

The study does appear to find a link between a reduction in footfall in towns that charge more than the national average for the quality of their offer, however there are so many other variables, including the priorities of authorities in setting their charging regime, that it is difficult to draw any conclusions from this aspect of the research.

In-depth research at the Department of Urban Transport Economics, Erasmus University of Rotterdam shows no statistical correlation between footfall and parking charges:

"Visitors to town centres suggested that car park charges do impact behaviour, but the general availability of spaces is felt to be more important than cost in their overall decision about visiting. Traffic flow and parking signage have as much, if not greater, an effect on their decision to visit the town centre, how long they spend there, and how much money they spend."- Association of Town & City Management

This view is further supported by a 2012 London Council's Report on the relevance of parking to the success of urban centres[16]. Whilst London specific, the report supports the view that whilst research is scant, most of the evidence suggests the link between pricing and vitality of high streets generally correlated towards higher value destinations having higher tariffs and that if anything, traffic levels are frequently cited by shoppers as detrimental to the experience of town centre shopping.

Further evidence that it is difficult to understand the relationship between parking and local economies is provided by research conducted for the Renaissance Market Towns Programme, which has relevance to the local context within the District. The report concluded that:

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[16] London Councils. November 2012. Relevance of Parking to the Success of Urban Centres http://www.londoncouncils.gov.uk/services/parking-services/parking-and-traffic/parking-information-professionals/review-relevance

"People are drawn to towns, or away from them by other factors, such as place of work and the quality of the shopping facilities and public spaces. Therefore, a town with good shopping facilities and some parking problems will continue to attract shoppers, despite the poor parking, whilst a town with ample, good parking but limited shopping facilities will not attract shoppers" - Renaissance Market Towns Programme, 2007

Other than in private car parks (e.g. NCP), Councils control the availability, duration and cost of car parking. In two-tier systems, Districts generally have more control over off street parking than any other aspect of transport policy and management[17].

Crucially Councils are rarely in control of the charging rates set at out-of-town developments. These are often free, and shopping centres are often designed to make shopping as easy as possible for people travelling by car. These discrepancies between in-town and out-of-town retail offerings are often blamed, particularly by the business community, for decreasing footfall and revenue in town centres. Whilst the District does not have any significant out-of-town retail, it exists in nearby Horsham and Crawley.

Re-Think! discusses the need to look at the 'value' of a space as opposed to simply the 'cost'. Drivers expect to pay more in the centre of a town than in an out of town location with the diverse range of services and cultural attractions available in town centres as opposed to purely shopping and eating offer in most retail parks.

To summarise, there is a general consensus that parking is just one of many factors in city and town centre vitality and there is little evidence to suggest that parking charges alone are a significant factor in destination choice.

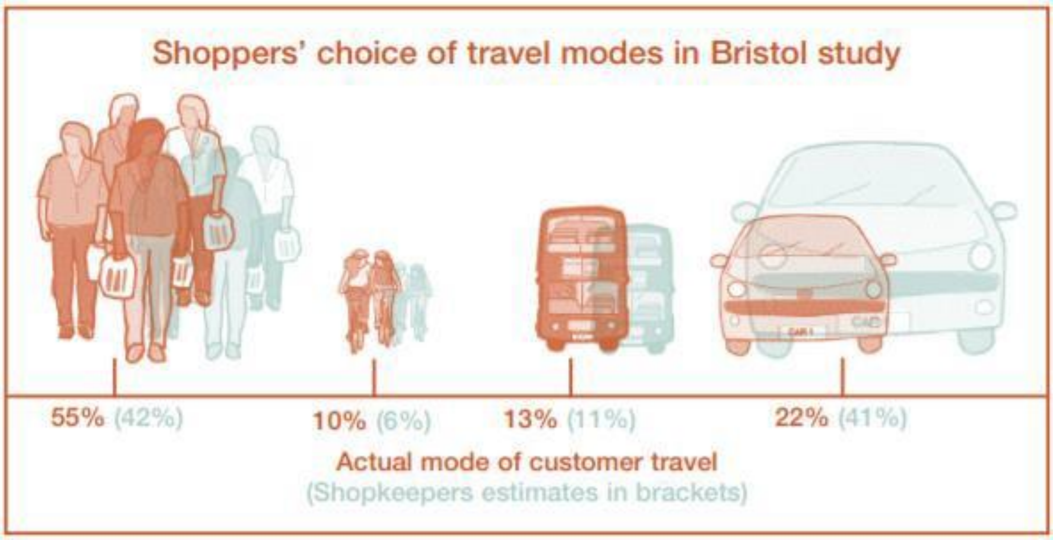
3.3 Spend and Mode of Travel

Within the town centre and high street context, there is a consistent tendency to underestimate the number of people shopping by modes other than car as well as their spending habits.

The London Councils' report and research by Sustrans through interviews and primary research in Graz, Bristol and Camberwell found that retailers overestimated the importance of car travel in how their customers arrive. Whilst these examples are in large urban areas, they do demonstrate consistent results.

[17] Springboard. 2013. Re-Think! Parking on the High Street report. http://www.britishparking.co.uk/write/Documents/Re-thinking_Car_Parking.pdf

Figure 6: Spend and mode of Travel in Bristol, UK, Sustrans



3.4 Changing Technology

Technological advances including new data services that supply transport information to the user or operator are developing quickly and can assist efforts to manage congestion. To provide the services that new technologies can offer, and which at least the younger generation is increasingly expecting, operators of parking services, including local authorities must adapt and work in collaboration with service providers.

Managing the challenges of congestion and air quality effectively will require parking service providers to encourage public acceptance and adoption of innovation and new technology to enable the delivery of parking solutions and services that can help improve these issues. It is essential that parking providers place the public at the heart of everything they do and ensure that they are designing services that are useful, and beneficial.

The British Parking Association (BPA), the recognised authority for the parking sector, published a 'Blueprint for Parking 2017-2021' calling on the government to remove the uncertainties surrounding new technology and encourage innovation in parking policies and standards to improve the delivery of parking services. The BPA's objectives for the next five years include: -

- Improving everyone's understanding of why parking is managed – parking management is a service to protect spaces for residents and people with disabilities on high streets, in town centres, on housing estates, in business parks, in shopping centres and in leisure centres – all of these would become congested and inaccessible if parking remains unmanaged. Good regulations and sensible management help revitalise the high street, and support residents, motorists, and businesses.
- Encouraging professionalism and continuous development to raise standards by continuing to develop apprenticeships, qualifications and professional development issues.
- Developing parking policy to ensure fair use of parking facilities and services – improve access to facilities for all to ensure equality and allow parking service providers to find out who is using their facilities fairly and in accordance with the law.
- Improving consistency in the way that parking services are being managed and delivered by local authorities by influencing parking policy, ensuring that they continue to support towns and high streets and prevent confusion for the motorist.
- Connecting emerging technology to parking and people's mobility aspirations using methods including campaigning for new parking policy and standards so that parking and traffic management can deliver a better customer experience.

- Supporting and encouraging investment and innovation into sustainable products and services – promoting use of technologies to improve driver's' ability to locate available parking spaces, thus reducing circulating traffic, shortening journey times and reducing congestion; integration with public transport and the installation of electric vehicle points; the use of ANPR (automatic number plate recognition) and other technologies.

The success of the BPA's blueprint will require changes to the perception of the parking sector by the public and the media, by presenting the sector in a positive way and opening people's eyes to the necessity for and the benefits of effective parking management. This will need a positive parking agenda with a focus on parking management rather than parking enforcement. Communication will be key, ensuring that the public fully understands the rationale and benefits behind any policy decisions.

The rapid expansion of connected cars and, longer-term, the introduction of autonomous vehicles needs to be planned for. By 2021 over 30% of all cars will be 'connected' and drivers will expect their car or app to find and pay for their parking automatically. Cars with an autonomous valet parking (AVP) function will be introduced and gradually become more common. This will bring new challenges to parking operators as car users will expect 'drop-off' and 'pick-up'areas instead of navigating their vehicles into a parking space.

How the public pays for parking is also changing. In most instances parking is a relatively small spend and cash remains the most common method of payment, However, the use of contactless payments is growing quickly, spurred on by banks looking to optimise operational efficiencies, growing customer confidence in the use of this technology and the increasing popularity of apps such as Apple Pay, Android Pay, PayPal etc. Contactless payment enhances operational efficiency for parking operators and provides data opportunities, as well as removing the potential for theft – a number of payment machines have been stolen from Council car parks in recent years.

In this report in response to the Council's brief and the challenges presented by change, we recommend actions that are in keeping with the BPA's aspirations for a positive parking experience.

3.5 Electric Vehicles

The term Electric vehicle (EV) is used to denote a 'plug-in' wholly electric or hybrid vehicle capable of running off a battery. Ownership and usage is growing, the National Grid projected recently that there could be as many as 10.6m EVs on the road by 2030 and this could rise to 36m by 2050; and in 2018 EVs accounted for nearly 10% of new car sales[18].

The advantage of EVs is in better local air quality and reduced road noise. However, they do nothing to tackle congestion, traffic severance, or reduce reliance on cars and their global environmental performance depends on their manufacture and how the energy to power them is generated. Like conventional cars EVs also emit particulates, this comes from brake, tyre and road surface wear and since advances in engines, they now exceed tailpipe emissions[19].

There is a strong policy push to promote EVs by central government at present. Local Authorities have been offered capital grant funding to support initiatives, most commonly EV charging points. There has been a tendency to put these in council-owned car parks as they provide the simplest and quickest route to delivery. But usage of these networks is very low (<3% in one place studied). One study, in particular, concludes that there are two main reasons for this; the first is a perception of reliability (points are often out-of-service); and the second that at present EV drivers essentially only charge at home and at places deemed 'reliable' such as motorway service stations[20].

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[18] Society of Motor Manufacturers and Traders
[19] Prof. Roy Harrison OBE, FRS, https://www.theengineer.co.uk/electric-vehicles-and-particulates/
[20] West of England, SourceWest Network Review, 2017. Not publicly available.

At present EVs are often second cars and owners ensure that their range is good enough for a daily routine. Specific issues faced by local authorities is the need for revenue funding to support EV charging networks once installed.

3.6 Implications for the Parking Strategy

High streets and town centres are changing nationally and need to change from retail centres to places where people want to live, work and enjoy. Parking has a role to play in this but is just one of a number of factors determining high street vitality.

There is no strong or proven link between parking charges and footfall or retail vitality- the value of the space and strength of the destination are bigger factors in customer choice of destination. Whilst unreasonably high charges would obviously put visitors off, there is little evidence of this happening in the real world as parking operators of all types generally seek to find the optimum price.

Evidence, although limited, suggests that if anything town centres benefit from reductions in traffic and that local customers walking or using public transport often spend more than car drivers in any case.

Changes in technology will play a significant role in how people decide on their destination, where they will choose to park and how they will pay for parking. Local Authorities of all sizes will need to respond to this change and to do so they will need to work together and to raise revenue to invest in new delivery models.

Local Authority car parks are not necessarily the optimum places for EV charging infrastructure and councils should consider their placement and how ongoing revenue costs are to be met carefully.

4. The Mid Sussex Car Park Estate

Our investigations suggested very strongly that not only do the three towns require a different approach from the larger village car parks, they also need a different approach from each other. The policies, challenges and proposed changes to the towns as well as the current status of these plans are very different. We have presented initial findings:

- An overview of the whole car park estate
- The three tier-one settlement car parks: Burgess Hill, East Grinstead and Haywards Heath;
- Tier two settlement car parks.

The District Council owns 42 car park sites, not all of which are pay and display or managed with a stay restriction. There is a mix of pay and display, restricted but free, and time-limited disc parking across the District. The Council produces Annual Parking Reports, which set out income, expenditure, complaints response and operations.

A map of the parking estate is shown below in Figure 7. Those car parks that are out of scope are shown in grey and include:

- The Martlets MSCP, which is being redeveloped as part of the Burgess Hill regeneration;
- Imberhorne Lane, in East Grinstead which is being disposed of;
- Horstead Keynes, which is owned by the Council but maintained and used for the recreation ground;
- Handcross, which is currently being disposed of; and,
- Clair Hall which will be considered but is currently being leased to Places Leisure.

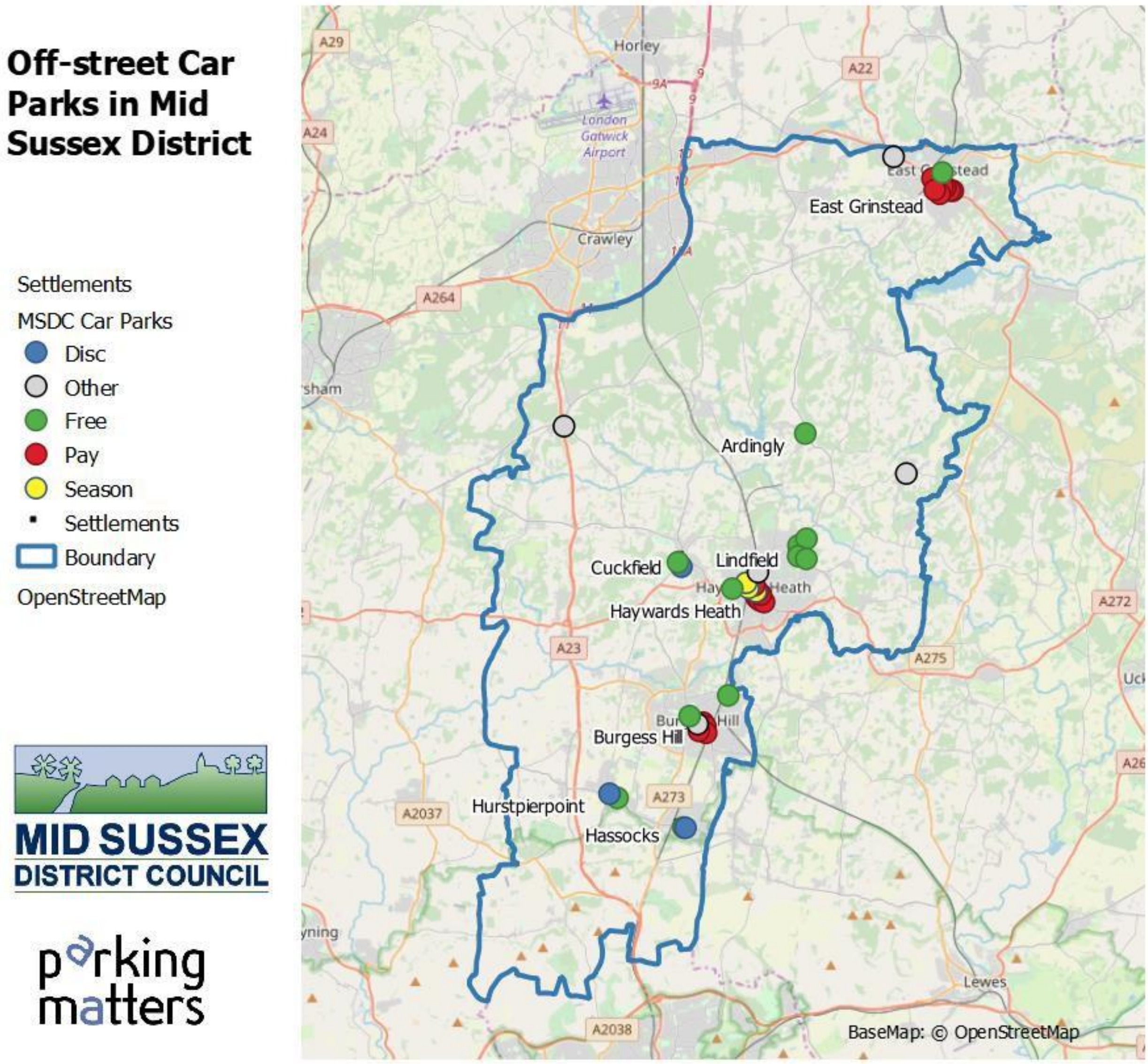
Data sources available included:

- Annual Parking Reports;
- Income by car park and as a total for the District between FY 14/15 and FY 17/18;
- Transaction information broken down by month and car park;
- PCN issues and reasons;
- PCN cancellations and reasons;
- Baseline information such as the number of spaces and tariff information.

It is important to note that occupancy information is not available at present. Whilst occupancy is often estimated from transaction information for example by dividing transaction hours with a number of spaces over a snapshot period of a week, this is not a robust method of accurately estimating occupancy. The main reason for this is that no compliance data is available and there is a tendency for customers to under or overpay (i.e. purchase less or more time than they spend in the car park).

We have proposed that occupancy surveys using ANPR or temporary CCTV cameras take place. Modern survey techniques provide a cost-effective way to record occupancy and length of stay. Notwithstanding this important data and the absence of compliance surveys, the information available at this stage gives us some indication of how well the car parks are used and allows us to make some sensible observations to take forward to Phase 2.

Figure 7: Off-street Car Parks in Mid Sussex



4.1 Tariffs and timed restrictions

The car park estate is covered by Off-Street Parking Orders and amendments and is enforced through Civil Parking Enforcement. This includes two leisure centres, and some recreation ground car parks.

Charges apply 08:00 to 18:00 Monday to Saturday and parking is currently free on Sundays. There is a uniform charging and payment arrangement across all Pay and Display Car Parks. Disabled parking is free, (unless stated, these spaces are included in yield calculations). Types of car parks are as follows:

- Short Stay, where only the pricing discourages long stay, priced at £6.00 for over 4 hours effectively limited until the next day at 08:00;
- Long stay where parking over 4hrs is £4.00 and again, limited to 08:00 the next day;
- Disc parking, where a disc is purchased in a local shop for £1 and set to allow for the maximum stay which varies between the three car parks;
- Limited stay without disc or pay and display, relating only to larger village car parks;
- Season ticket holders and permits only (Muster Green is Pay and Display on Saturdays); and,
- Other car parks managed by the Council, but for leisure and recreation use.

Table 2 shows the car parks within the estate that charge for parking and have restricted stay length. Tariff structures and charges will be benchmarked and challenged in Phase 2.

Table 2: Paid Car Parks or those with restricted parking (excl. leisure)

Town	Name		0 - 1 Hrs	1 - 2 Hrs	2 - 3 Hrs	3 - 4 Hrs	4 hrs +	Season p.a	Type
E. Grin	Queensway	Short Stay	£0.80	£1.20	£2.00	£4.00	£6.00	£550.00	P+D
E. Grin	Kings Street	Short Stay	£0.80	£1.20	£2.00	£4.00	£6.00		P+D
E. Grin	Christopher Rd	Short Stay	£0.80	£1.20	£2.00	£4.00	£6.00		P+D
E. Grin	Vicarage	Long Stay	£0.80	£1.20	£2.00	£3.00	£4.00	£550.00	P+D
E. Grin	Chequer Mead	Short Stay	£0.80	£1.20	£2.00	£4.00	£6.00		P+D
E. Grin	Railway Approach	Mixed	£0.80	£1.20	£2.00	£3.00	£4.00	£550.00	P+D
E. Grin	Norton House	Long Stay	£0.80	£1.20	£2.00	£3.00	£4.00	£550.00	P+D
B. Hill	Cyprus Road	Mixed	£0.80	£1.20	£2.00	£3.00	£4.00	£550.00	P+D
B. Hill	Station Rd	Long Stay	£0.80	£1.20	£2.00	£3.00	£4.00	£550.00	P+D
B. Hill	Queens Cr	Long Stay	£0.80	£1.20	£2.00	£3.00	£6.00	£550.00	P+D
B. Hill	Church Rd	Short Stay	£0.80	£1.20	£2.00	£4.00	£6.00		P+D
H. Heath	The Orchards	Short Stay	£0.80	£1.20	£2.00	£4.00	£6.00		P+D
H. Heath	Hazelgrove	Short Stay	£0.80	£1.20	£2.00	£4.00	£6.00		P+D
H. Heath	Heath Rd	Mixed	£0.80	£1.20	£2.00	£3.00	£4.00		P+D
H. Heath	Franklynn Rd	Long Stay	£0.80	£1.20	£2.00	£4.00	£4.00		P+D
H. Heath	Haywards West	Short Stay	£0.80	£1.20	£2.00	£4.00	£6.00		P+D
H. Heath	Haywards East	Short Stay	£0.80	£1.20	£2.00	£3.00	£6.00		P+D
H. Heath	Gower Rd	Short Stay	£0.80	£1.20	£2.00	£3.00	£6.00		P+D
H. Heath	Muster Green	Season Tickets	£0.80	£1.20	£2.00	£3.00	£6.00	£550.00	PERMIT
H. Heath	St Wilfrids	Season Tickets						£550.00	PERMIT
H. Heath	Boltro Rd	Season Tickets						£750.00	PERMIT
Cuckfield	Broad St	Mixed		Max.		Max.		£550.00	DISC
Hassocks	Orion	Short Stay			Max.				DISC
Hurstp.	Trinity Rd.	Mixed		Max.			Max. > 23 hrs		DISC
Hurstp.	Brown Twins	Long Stay					Max. > 24hrs		

4.2 Income and Transactions

Central government states that Annual Parking Reports should be produced within 6 months of the end of each financial year[21] although many Councils fail to do so. These reports set out income, expenditure and enforcement. Mid Sussex does produce Annual Parking Reports, and this has been one of the key sources of information.

There appear to be some minor summing issues regarding the total number of spaces in the car park information supplied, for example disabled bays don't always seem to be included in the total number of spaces. We've used the 'total spaces' column as supplied to make the calculations rather than second guess the actual totals and will look to refine the numbers during site visits and surveys.

We have used 17/18 as the baseline year for the analysis as information for this year was consistent and complete. Some information for 18/19 was available but there was little in the way of significant changes which means 17/18 can be used to carry out analysis adequately.

Table 3 shows income by town and financial year. Income has grown only slightly over the last four years staying reasonably static, from £2.14m in 14/15 to £2.23m in 17/18. Income per space has also risen during this period from £989 p.a. to £1,032, although modestly; about 0.13p per charging day.

Table 3: Income by town 14/15 - 17/18 (and 17/18 season tickets income).

Town	14/15	15/16	16/17	17/18	17/18 Seas.
E. Grin	£771,306	£762,018	£783,364	£803,578	£55,550
B. Hill	£517,188	£558,296	£577,380	£569,576	£90,750
H. Heath[22]	£852,079	£842,145	£866,030	£861,767	£70,700
Total	**£2,140,573**	**£2,162,458**	**£2,226,774**	**£2,234,922**	**£217,000**
Income per space	£989.17	£999.29	£1,029.01	£1,032.77	n/a

There is no significant variation across the 4 years between the three tier one settlements.

Figure 8: Income by town (excluding season tickets)

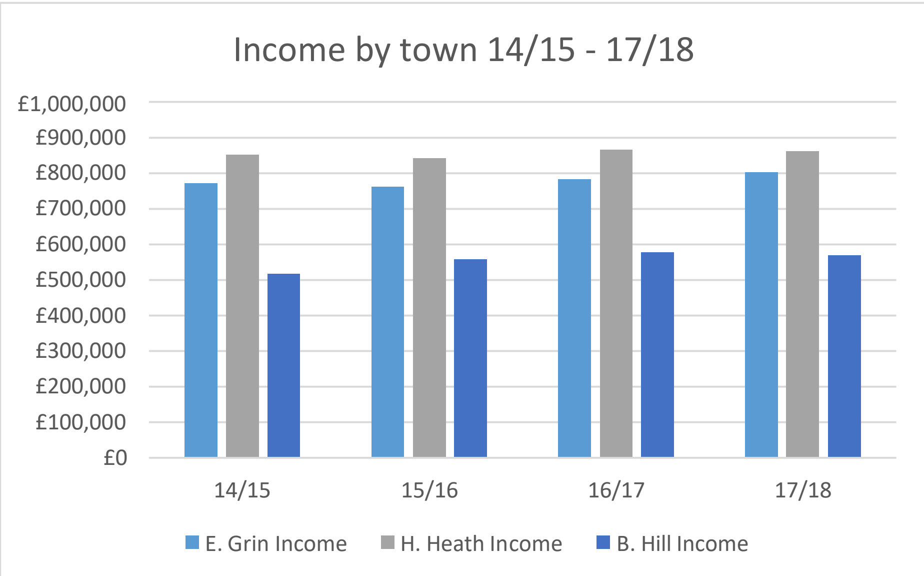


Table 4 shows pay and display transactions by town and financial year. Whilst there are some minor changes year-on-year, transactions are largely flat, despite a slight increase in the overall level of income.

[21] Operation Guidance to Local Authorities, Parking Policy and Enforcement, DfT, 2015
[22] P&D data excludes Muster Green, as this only allows P&D on Saturdays.

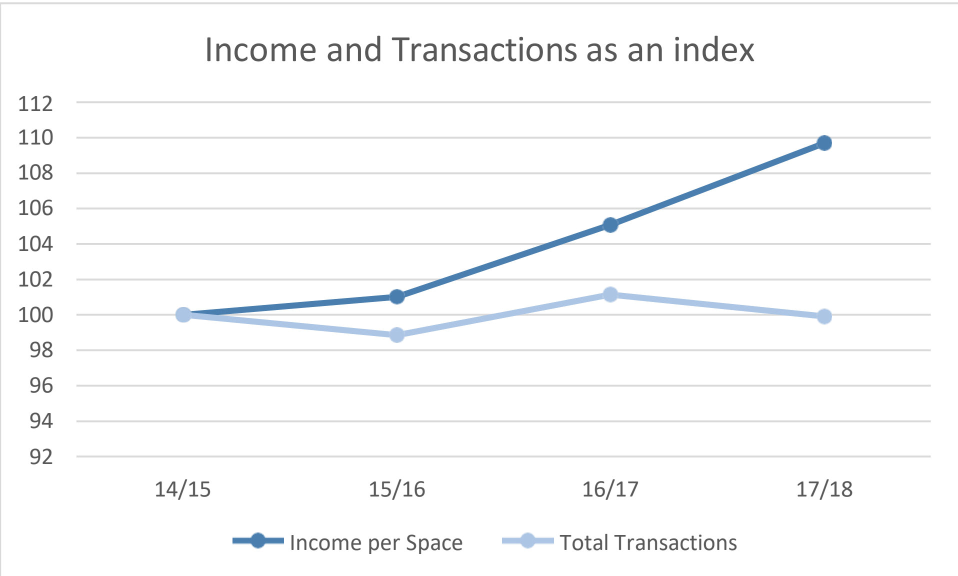
Table 4: Transactions by town 14/15 - 17/18

Town	14/15	15/16	16/17	17/18
E. Grin	534,543	519,424	529,972	540,401
B. Hill	421,228	434,555	444,575	433,473
H. Heath[23]	705,850	688,541	706,126	686,475
Total	**1,661,621**	**1,642,520**	**1,680,673**	**1,660,349**
Trans. Per space	745.41	736.81	753.91	744.79

The pattern becomes a little clearer when looking at the data as an index (Figure 9). This shows a general trend towards a higher yield per space, and a largely flat trend in the number of transactions from year- to-year. This could suggest two things; either people are staying longer, and car parks are fuller as the transaction data suggests; or, customers are over-paying as the tariffs effectively reduce in line with inflation every year as tariffs have not been reviewed since 2012. Whilst probably a combination of both, over-paying may be the largest factor as tariffs have been effectively reducing since they were last reviewed in 201209.

This, combined with cashless payments may be encouraging customers to pay for more time than they strictly need. After all, an additional 40p to provide peace-of-mind is good value and cashless parking makes it convenient. However, the effect shouldn't be overstated; there is only a 4% increase between 14/15 and 17/18.

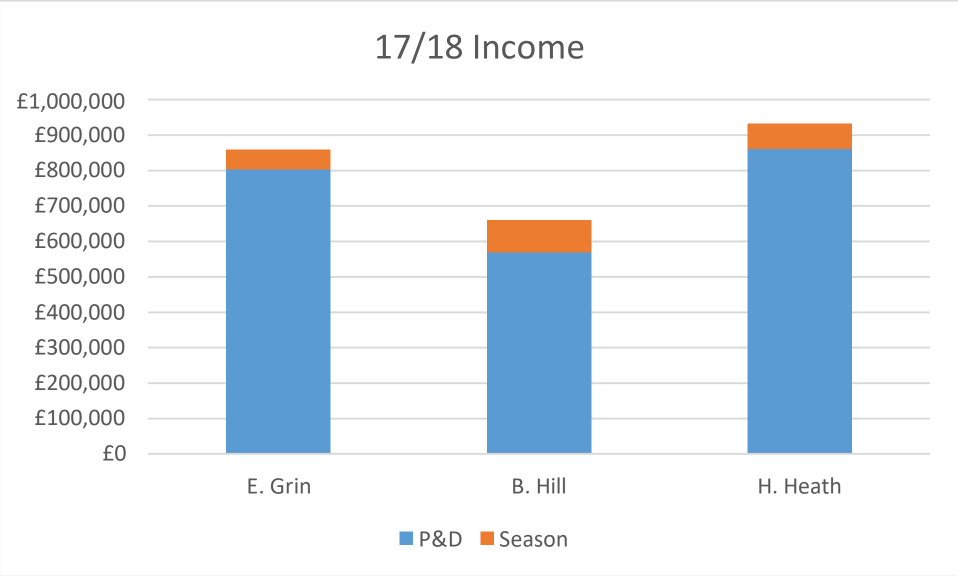
Figure 9: indexed, income and transactions



[23] P&D data excluding Muster Green, as this only allows P&D on Saturdays.

The average £1,032 yield per space in FY17/18 is significantly higher than the season ticket price of £550 / £750. At the challenge phase we will consider in more detail the performance of season tickets and their benefits to the Council (bearing in mind policy objectives).

Figure 10: 17/18 income from P&D and season tickets



4.3 Summary and phase 2 work

Overall trends for the 4 years' worth of data considered show a slight and gradual increase in income, increase in yield per P&D space and flat number of transactions.

Phase 2 work will include:

- Carrying out occupancy surveys that will be conducted to provide evidence as to the relative 'business' of each car park;
- A consideration of whether a uniform approach to tariffs is appropriate given the results of this exercise;
- Some benchmarking of the District's tariffs against other comparable places and car parks with reference to retail vitality;
- A challenge of season ticket policy and whether they are providing 'best value' to the Council in their current form and at their current rate; and,
- Other detailed work as outlined in the relevant sections under each settlement or section.

5. Burgess Hill

Burgess Hill will grow significantly over the next 15 years with a vision that includes 5,000 new homes and employment space including 2 new business parks and a Science and Technology Park. Additionally, a town centre redevelopment scheme has recently been submitted for planning permission.

The Northern Arc development secured outline planning consent in October 2019 and comprises 4,000 dwellings, 25ha of employment land, two new primary schools, a secondary school, an outdoor sports centre, and a link road to connect to the A2300 and onwards to the A23. The Council and Homes England have worked to produce a masterplan and transport and infrastructure packages for the town. The land was allocated in the District Plan.

In partnership, the County and the District Council has secured funding from the **Local Growth Fund** (£18.9 m in 2016 and a further £14.9m in 2017, both matched with other funding) to improve connectivity, reduce congestion, improve journey quality and time reliability. A key component will be to provide attractive sustainable transport options and reduce the need for car journeys, there is an ambition to achieve 15-20% modal shift from the base case scenarios in the Transport Assessment. This will be achieved with improvements to road management systems and junctions, new local bus services and upgraded passenger information.

New cycle and pedestrian ways will also be developed to improve links between new developments and the town centre as well as:

- building capacity and improvement to road management systems and junctions;
- integrated transport solutions, including bus and interchange improvements;
- new cycle and pedestrian ways linking new developments to the town centre, improve existing cycle/footpaths and a new cycle path to link Burgess Hill and Haywards Heath;
-

A CPZ is proposed around Wivelsfield Station in the Burgess Hill Transport Investment Plan. Full details are available in the 2014 **Burgess Hill Transport Investment plan** on Mid Sussex District Council's website[24].

[24] https://www.midsussex.gov.uk/media/3228/ep41b_bh_tip_final.pdf

Additionally, on the south-east of the town, a site known as Keymer Tiles is under development for housing (~475 dwellings) and a new employment site known as the Hub which will offer 50,000m^2 of employment space.

Burgess Hill Town Centre is also likely to undergo a transformation in the next 5-10 years with an application submitted in Autumn 2019 for a regeneration of the Martlets Shopping centre. This will result in the demolition of the Martlets MSCP.

The town centre plan includes:

- An 11 storey housing block with 170 units (with only 72 parking spaces);
- A hotel, bowling alley and 10 multiscreen cinema;
- A new avenue of shopping and leisure, and;
- An extension to the current Marketplace car park replacing the Martlets MSCP.

A short **Car Park Management Plan**[25] is appended to the planning application. This plan outlines that the new development will include 167 parking spaces. This represents a net gain of 8 spaces as the existing Martlets council owned MSCP will be demolished. It is stated that *"For consistency with the existing car park and for consistency with Mid Sussex District Council parking policy, it is proposed that the existing charging structure is extended to cover the additional parking spaces added"* and that weekend charges and free parking for blue badge holders will be kept in line with the District's Parking tariffs and policies.

At the time of writing there is a suggestion that this arrangement may change as one of the developers or prospective anchor tenants seeks more control over the parking. The outcome of this is likely to emerge during the Strategy's formulation.

Figure 11: NewRiver's impression of the new development showing car parking and residential on the existing MSCP site

[25] http://194.165.12.101/AnitePublicDocs/00661165.pdf

5.1 Road Space Audit

A Road Space Audit for Burgess Hill was carried out by WSP, and the final report submitted to MSDC in October 2018. We have used this as a primary resource for information. It includes:

- A calculation of the current number and type/tariffs/turnover of free limited on-street parking bays and an estimate of off-street bays provided by MSDC and third parties in the town (e.g. supermarkets);
- An outline of workplace parking strategies/travel plans developed by employers, existing travel habits and alternative transport provision;
- Some consideration of future requirements, but only relating to on-street parking.

Initially, the brief included site appraisals and public consultation. These have not yet taken place. There is little value in repeating large sections of the 2018 WSP report but some important key points are mentioned below. The survey found a total of 132 limited waiting on-street parking bays in Burgess Hill ranging from 20min limit to a 1hr and between 12mins and 5mins walk from the town centre.

A parking beat survey[26] s took place on a selected sample of roads, and vehicles were categorised as 'resident', 'visitor' or 'commuter' depending on the time period they were first observed in and their length of stay.

These beat surveys found a variation in how the bays were used. For example, in Albert Rd, most of the parked cars were visitors i.e. short-medium term parking to visit local residents or services, and in Chanctonbury Rd, they were mainly residents. Only on Victoria Gardens were the largest group commuters and even here only narrowly. Given that the road serves an employment area, this isn't surprising.

The WSP report notes that on Norman Rd, which was subject to a petition from residents about perceived commuter railway parking, most of the vehicles appeared to be residents. But the survey method left this an open question.

Recommendations on whether a CPZ would be needed in the future were unclear, which is reasonable given the uncertainty surrounding the various development proposals and the conclusion that there is current capacity both on and off-street.

5.2 Off-street Parking

Figure 12, shows the locations of the 7 off-street car parks controlled by MSDC in Burgess Hill. As mentioned, Martlets MSCP is due to be removed as part of the Town Centre regeneration. Provision will be replaced as part of the redevelopment, but this new car park will not be managed by MSDC. This arrangement is similar to the current arrangement for the Market Place car park which is not managed by MSDC but follows the same charging regime.

The number of spaces as reported by MSDC, income and transaction data from 14/15 to 17/18 is used to give an overview of how these car parks are being used and currently functioning.

[26] Sites are surveyed at regular intervals during the day in a circuit, or 'beat'

Figure 12: MSDC Off-street Car Parks in Burgess Hill

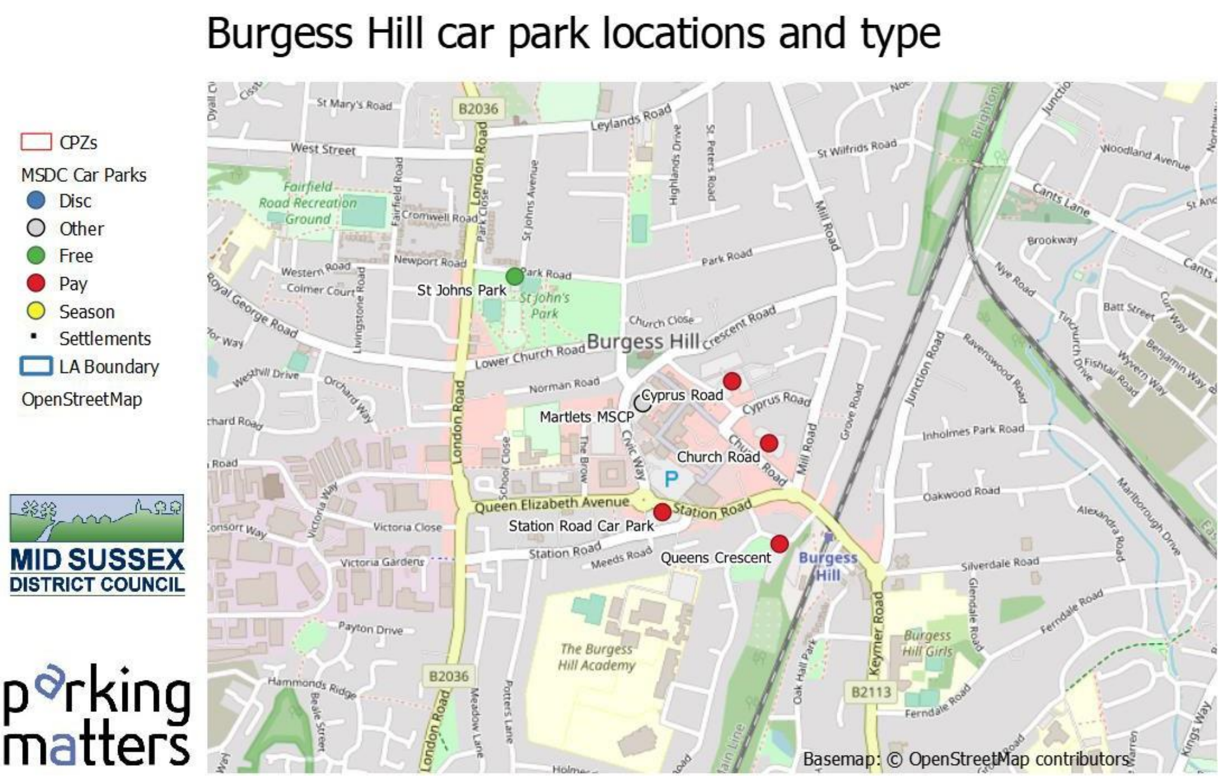


Table 5 gives a good impression of relative performance using income and transaction data. More information regarding seasonal variations and transaction type is available in the 2018 WSP report but this data highlights little in the way of specific issues which relate to Burgess Hill (for example seasonal variation by month simply follow national trends).

Table 5 Burgess Hill off-street parking summary table

Name	Spaces	Income 17/18 (inc seas.)	Trans. 17/18	tr. /spa. /p.a.	tr. /spa. /p.d.	£ /spa. /p.a.	£ /spa. /p.d.	£ /tr.	Seas.
Cyprus Road	302	£236,987	157,677	522	1.67	£784.72	£2.19	£1.31	56
Station Rd	120	£93,277	35,855	299	0.96	£777.31	£1.60	£1.67	61
Martlets MSCP	159	£129,460	116,128	730	2.34	£814.21	£2.61	£1.11	
Queens Cr	205	£91,040	27,557	134	0.43	£444.10	£1.01	£2.35	48
Church Rd	52	£109,563	96,256	1,851	5.93	£2,106.97	£6.75	£1.14	

As well as having the highest income per space at £2,028 p.a. (or £6.75 per day[27]), Church Road also has the highest number of transactions per space and the second lowest price per transaction (£1.14). This suggests that it is fulfilling a role for short term parking close to the town centre to allow access to local shops and services. These numbers also suggest that utilisation is very high at most times during the day which supports our site visit observations and the views of MSDC. The site's redevelopment potential appears limited as it allows access to a private car park to the northeast and to the rear of properties.

Cyprus Rd provides a mix of long stay and short stay parking and is the largest MSDC car park close to the town centre. Almost six times larger than Church Rd, Cyprus Rd provides parking close to the town centre and appears to have reasonable utilisation rates based on 1.43 transactions and an income of £1.87 per day. According to West Sussex County Council's IMap, a right of way looks to run east-west across the site from Middle Way to Cyprus road, which would potentially complicate any

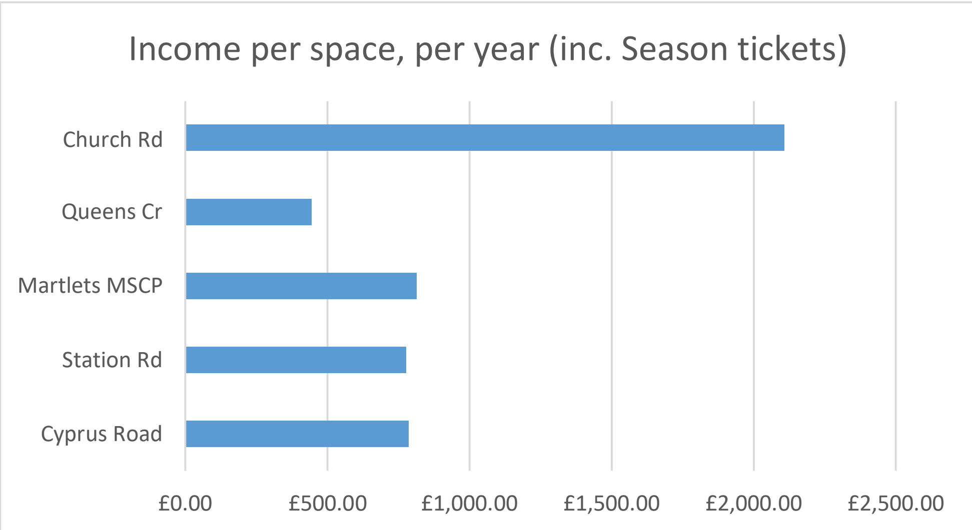
[27] Based on a simple 312-charging days per year calculation.

redevelopment or intensification. The site also provides 2 EV charging points and a recycling centre.

Station Road Car Park sits around 200m south of the town centre, further away from the third party operated Market Place Shopping Centre car park, and to the west and south of employment areas. The transaction rates and income seem to suggest a busy, but rarely full car park. The car park charges the same as the Market Place Shopping Centre. The yield per space is low, at 86p which reflects the high number of season ticket holders using this car park from nearby employers.

Queens Crescent sits next to Burgess Hill Station. The station car park's rates are now £4.20 Mon-Sat (30p higher than it was when WSP undertook their study) and means the MSDC car park is 20p cheaper per day. The average transaction price is the highest amongst the Burgess Hill Car parks and reflects the car park's intended role as longer-term parking and the yield suggests the car park is not full most of the time; an opinion backed up by local knowledge.

The off-street estate in Burgess Hill is generally well maintained with clear signage and lining and very little of the clutter often associated with local authority-owned car parks.



5.3 Summary & Phase 2 work

Burgess Hill car parks, in general, have lower yields than those in Haywards Heath and East Grinstead. The transaction data and site visits seem to suggest there is capacity, and the WSP work suggested the same for on-street parking.

The focus of Phase 2 is likely to be a fuller analysis of what the impact of the growth will be on the car parks for the town and a consideration of how Queens Crescent can be made to offer better value to the town and the Council. The occupancy surveys will give us a clearer picture of the relative performance of each of the car parks. Cyprus Rd could offer some potential to increase supply, subject to financial and policy case of course.

6. East Grinstead

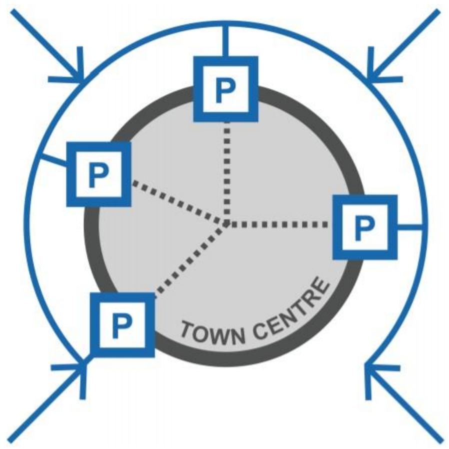
On the northern border of the District, development at East Grinstead is constrained, with a historic town centre area and the High Weald Area of Outstanding Natural Beauty (AONB) and Ashdown Forest SPA to the south and east. A conservation area appraisal was carried out during 2019 and proposed that the area is extended[28]. The original boundary area included Chequer Mead Car Park and borders Vicarage Walk. The town attracts visitors and is home to the Bluebell Railway which carried around 250,000 passengers in 2014[29]. The Neighbourhood Plan has several objectives to increase tourism to the town.

There are no major development proposals for East Grinstead. The Working Groups reported that that East Grinstead is subject to windfall and infill development (for example conversion of houses into flatted units). The Housing Land Supply Position Annual Statement 2019, does not identify settlement for a windfall but reports a high number of smaller sites in the town.

There is a recognition that the town experiences peak time congestion in the **Local Transport Plan 2011-2026** and in traffic studies which have focussed on specific roads and junctions (such as the A22, London Rd) [30]. The A22 travels directly through the town centre, albeit on an old railway alignment for some of the length, bypassing the High Street. The LTP recognises that the situation is compounded by the absence of a bypass and settlements to the south and east looking to travel through to the station, the M23 or Gatwick.

The **Neighbourhood Plan** considers Car Parking. Policy AM02 aims to direct visitors to the town to use a nearby appropriate car park on the edge of the town centre and then continue their visit on foot using signage and if possible Variable Message Signage in order to reduce congestion caused by searching for parking . Policy AM16 seeks to make provision in the town centre mainly off-street with good pedestrian routes between car parks and the town centre. The neighbourhood plan also seeks appropriate levels of off-street car parking in new developments in line with county policy.

Figure 13: Diagram from the Neighbourhood Plan "Drive TO, not THROUGH"



Following pressure on road space from parking, which reportedly gets worse towards the station, a Controlled Parking Zone was implemented in 2000 and revised in 2013 to cover surrounding residential streets. A minor review took place in 2016 and reported increased demand within the zone. Reports suggest that the CPZ has displaced long term parking further out into residential streets adjoining the CPZ.

These two challenges- rising residential density without off-street parking and a historic town centre which needs to be protected- combine to make the issue for East Grinstead one of managing demand whilst working within some strict constraints.

6.1 Road Space Audit

As with Burgess Hill, a Road Space Audit was carried out for East Grinstead by WSP, and the final report prepared by WSP which was provided to MSDC in October 2018 has been prepared. We have used this as a primary resource for information and summarised some of the key points below whilst aiming to minimise repetition.

The road space audit continues to reinforce the local opinion that parking congestion on residential roads is a problem for residents and that congestion on main routes is an issue. As with Burgess Hill, the

[28] https://www.midsussex.gov.uk/media/3710/conservation-areas-in-mid-sussex.pdf
[29] https://www.bbc.com/news/uk-england-sussex-28988650
[30] https://www.eastgrinstead.gov.uk/neighbourhood-plan/consultation-archive/traffic-studies/atkins-east-grinstead-traffic-management-study-stage-3-final-report/

stakeholder engagement part of the work has not been undertaken yet, but the study reports that it will follow at a later date.

The study found that 144 locations provided 1,023 parking spaces and about 4,739m of on-street Limited Waiting parking places. A sample of streets which adjoined the CPZ was chosen to survey and beat surveys were conducted using the same methodology as the Burgess Hill study (every three hours, cars categorised as resident, commuter or visitor depending on length of stay).

The conclusion was that the majority of the parked cars were either residents or visitors. As an example in Charlswood Rd; 62 of the vehicles were deemed residents, 15 commuters, and 30 visitors. Surveys close to the hospital suggested some hospital staff parking, but shift patterns would make this difficult to confirm.

Figure 14: Permits and on-street capacity within the CPZ (after WSP)

Uptake	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Zone A - Capacity	472	472	472	472	472	472	472	472
Zone A - Issued (Residents)	442	438	443	448	443	447	458	463
Zone A - Issued (Non Residents)	16	17	18	18	17	18	18	18
Zone A - Remaining Capacity	14	17	11	6	12	7	-4	-9
Zone B - Capacity	299	299	299	299	299	299	299	299
Zone B - Issued (Residents)	221	224	223	221	220	223	226	226
Zone B - Issued (Non Residents)	65	63	63	62	62	60	61	61
Zone B - Remaining Capacity	13	12	13	16	17	16	12	12

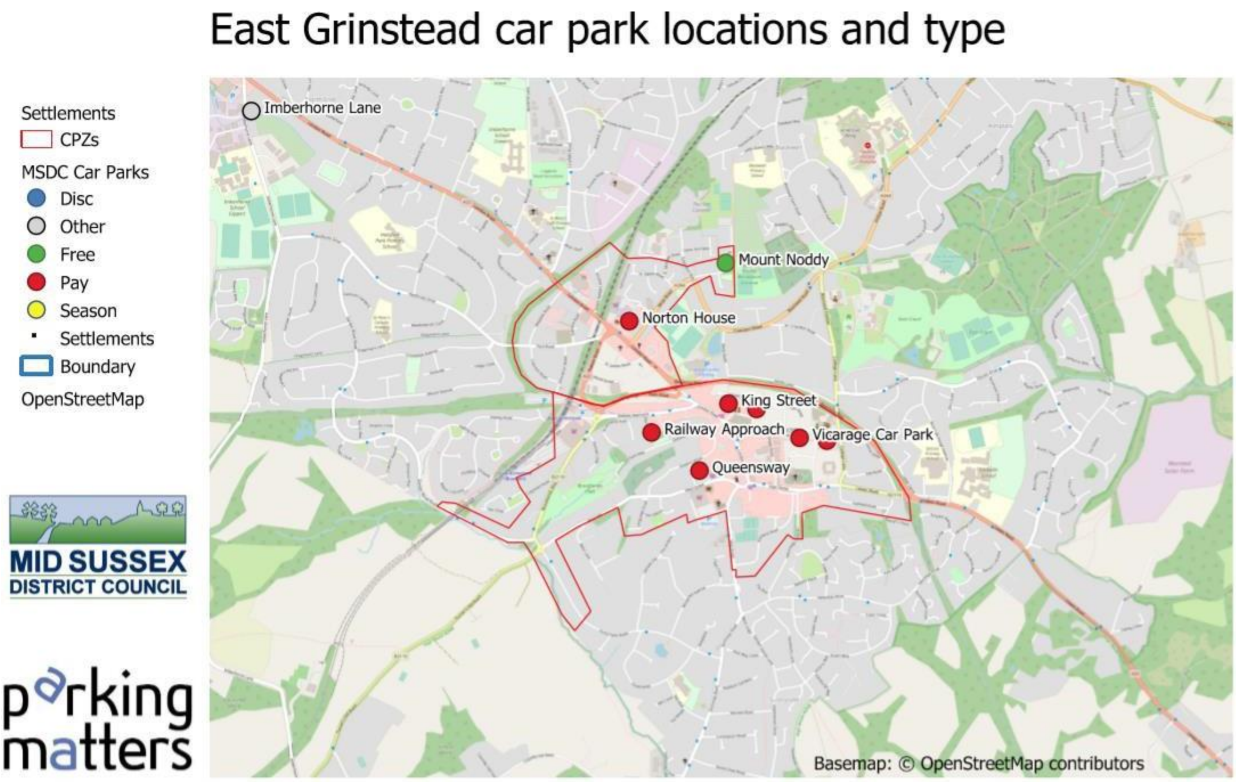
With regards the CPZ the WSP report concluded that:

- Zone A is pressured, with more permits issued than spaces, but this falls under the 10% above capacity objective but there is capacity in Zone B;
- The Zone A pressure may be exacerbated by space used for Pay and Display; and,
- There is pressure on High St. West St. and London Rd.

6.2 Off street parking

There are eight Council operated off-street Car Parks in the town. Imberhorne Lane has been earmarked for disposal as a development site and is not considered further.

Figure 15: MSDC Off-street Car Parks in East Grinstead



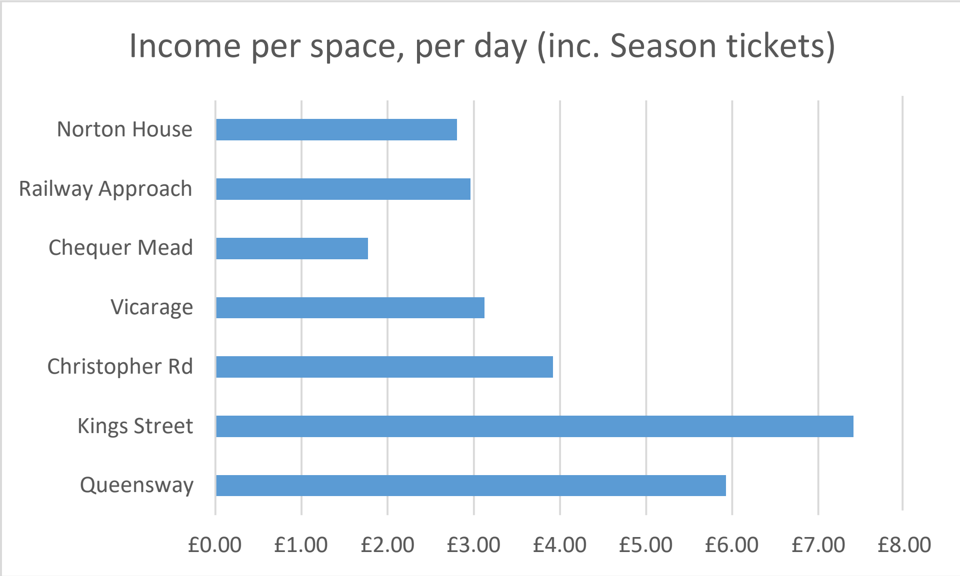
Six of the car parks form a cluster around the historic town centre with Norton House serving the retail area to the north-west.

Figure 16:East Grinstead off-street parking summary table

Name	Spaces	Income 17/18 (inc seas.)	Trans. 17/18	tr. /spa. /p.a.	tr. /spa. /p.d.	£ /spa. /p.a.	£ /spa. /p.d.	£ /tr.	Seas.
Queensway	159	£293,983	235,739	1483	4.75	£1,848.95	£5.93	£1.25	3
Kings Street	66	£152,548	106,308	1611	5.16	£2,311.33	£7.41	£1.43	
Christopher Rd	42	£51,312	35502	845	2.71	£1,221.71	£3.92	£1.45	
Vicarage	151	£147,264	58665	389	1.25	£975.26	£3.13	£1.94	61
Chequer Mead	122	£67,240	47248	387	1.24	£551.15	£1.77	£1.42	
Railway Approach	86	£79,466	30792	358	1.15	£924.02	£2.96	£2.19	22
Norton House	77	£67,315	26147	340	1.09	£874.22	£2.80	£2.26	15

In general, the off-street car parks in East Grinstead are busy with Queensway yielding the highest income of the whole district.

Queensway is closely followed by King Street which also looks to be busy with a high number of transactions and high yields per space. Whilst occupancy surveys will help to quantify to what scale, the Working Group Members have reported consistently that both are busy and close to full for much of the day.
Transaction data seems to support this. Queensway provides 159 short-stay parking spaces that serve London Rd and the Queens Walk shopping precinct. The average transaction value and number of transactions seems to suggest that it serves this function well. The site looks reasonably unconstrained.



King Street, whilst much smaller, is reportedly busy during the day. Its relatively small size and awkward shape do not necessarily lend itself to any obvious development.

Chequer Mead and Vicarage are opposite each other across Church Lane but appear to vary significantly. Chequer Mead sits within the conservation area and is designated as short stay despite being some distance away from the town centre, which could explain its lower transaction rates and yield. Vicarage is a long, approx. 30m wide, site offering four rows of parking and is bounded on three sides with residential homes; and from the data looks to be much busier than Chequer Mead. The site certainly seems to offer potential for intensified use or alternative use on first glance.

Railway Approach is comprised of an undercroft and at-grade parking about halfway between the railway station and London Rd. Whilst transaction data suggests the car park is not overly busy, there are 22 season tickets assigned to the car park, most likely for rail commuter use.

Norton House sits on mixed use land which includes a fire station and a low rise mixed-tenant office building. An Aldi car park of about the same size with a maximum 90min stay sits to the west. Anecdotally the Aldi car park sometimes reaches capacity which leads to people using the P&D for shopping.

Mount Noddy is very small (around 30 spaces), free and reportedly busy at key times. Whilst it is stated on signage that it is only for the use of park visitors there is no system in place to check this. It is worth considering Mount Noddy for inclusion in any surveys.

6.3 Summary and Phase 2 work

The Road Space Audit confirms the local perception that the pressure on on-street parking is likely to be correct. There is a seasonal variation in the number of transactions per month, for example transactions are higher in December, but this only reflects national retail footfall. It does help confirm however that retail is the main reason for off-street car park use. The strength of policy support for discouraging on-street commuter parking, encouraging visitors and keeping traffic out of the historic core, could support some additional parking provision if an appropriate site can be found.

In phase two, the focus is likely to be on making the best use of the existing assets and considering the findings of the usage surveys. Transaction and income data, discussions with the working group and anecdotal evidence with a view to supporting the Neighbourhood Plan objective and the Council and County Council’s efforts to support residents and businesses through parking by managing commuter parking.

Townscape and congestion are likely to be the focus of efforts to extract ‘best value’ from the estate, not just financially but also in terms of supporting policy objectives with the estate.

7. Haywards Heath

Haywards Heath is the administrative centre for the District with some medium-sized employers and high levels of rail-based out-commuting. The town has not been the subject of a Road Space Audit, however a Parking Study is in train with some survey data including origin/destination for off-street car parks.

There is ambition within the Council and wider town to regenerate parts of the town centre. These plans are at an early stage. This should be seen as an opportunity; as a major land owner, parking will have a role to play and by getting the strategy right the parking estate will be in a good position to support any proposals and respond sensibly.

There are some early plans for a wider Haywards Heath Town Centre Masterplan Supplementary Planning Document (SPD) which includes the Orchards Shopping Centre.

The Orchards shopping centre was bought by the Council in 2016 . As well as securing an income stream a stated aim was to attract investment into the centre and bring new restaurants and shops to the town[31].

As a whole, the Orchards Shopping centre and Orchards, Hazelgrove and St Wilfrids car parks represent an approximately 2.2ha of land controlled by Mid Sussex District Council.

The **Haywards Heath Community Plan** was adopted in 2016 and covers the period 2014 – 2031 with a vision to achieve:

- A healthy, family focussed and safe town;
- A strong community spirit embracing both young and older people;
- Supporting a vibrant economy;
- Having excellent public services; and,
- High-quality public spaces.

Sections relevant to parking include an objective that new development provides adequate off-street parking for residents and tenants and a specific objective relating to car parking, shown in Figure 17.

[31] https://www.midsussextimes.co.uk/news/council-buys-orchards-shopping-centre-aps23m-757044

Figure 17: Extract from Haywards Heath Neighbourhood Plan

Car Parking

Objective 8B: To ensure sufficient car parking within the town centre supports the viability of the town and improve the pedestrian areas in the town centre.

8.12 Car parking is seen as vital to supporting the shops and other businesses within the town centre and to avoid congestion in the residential areas of the Town. HHTC will work with those bodies responsible for parking to ensure sufficient parking is provided and that it continues to support a vibrant town centre and adequate provision throughout.

8.13 Any future redevelopment/new development in the town centre must maintain at least the number of existing public parking spaces in the town centre and improve on the number of cycle parking spaces available.

8.14 The town centre car parks provide a vital role in supporting the vitality of the town centre and this support has to be maintained.

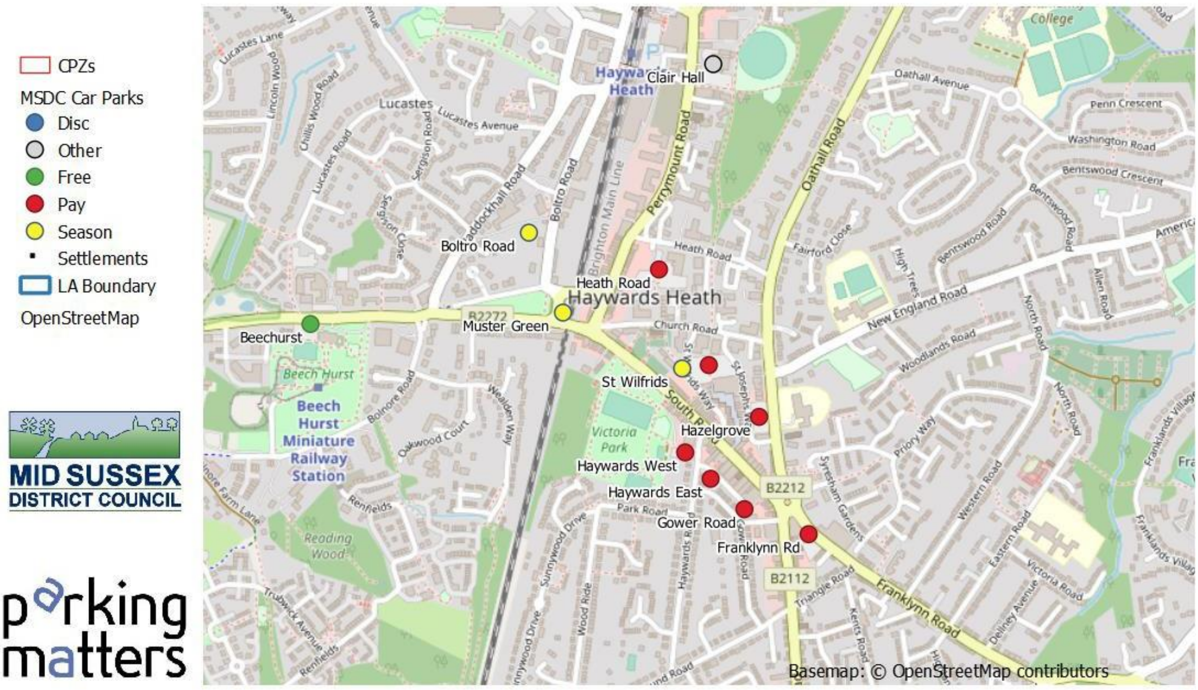
Policy T3: Planning applications which result in the loss of existing off-street parking provision will be resisted unless it can be demonstrated that the development will enhance the vitality and viability of the town centre and, where possible, such schemes should aim to improve parking provision in the town centre. Development outside the defined town centre boundary should provide on-site parking in accordance with the standards adopted by MSDC.

Evidence Base Mid Sussex parking standards; WSCC Haywards Heath Transport Study 2015

7.1 Off-street Parking

There are 10 paid car parks in Haywards Heath, three of which are permit only (or permit Mon-Sat in the case of Muster Green). Additionally, Clair Hall serves an events venue and Beech Hurst serves Beech Hurst park.

Haywards Heath car park locations and type



Haywards Heath car parks seemed to fall into three broad categories; four small car parks to the south; three central car parks; and three permit car parks.

Figure 18: Haywards Heath off-street parking summary table

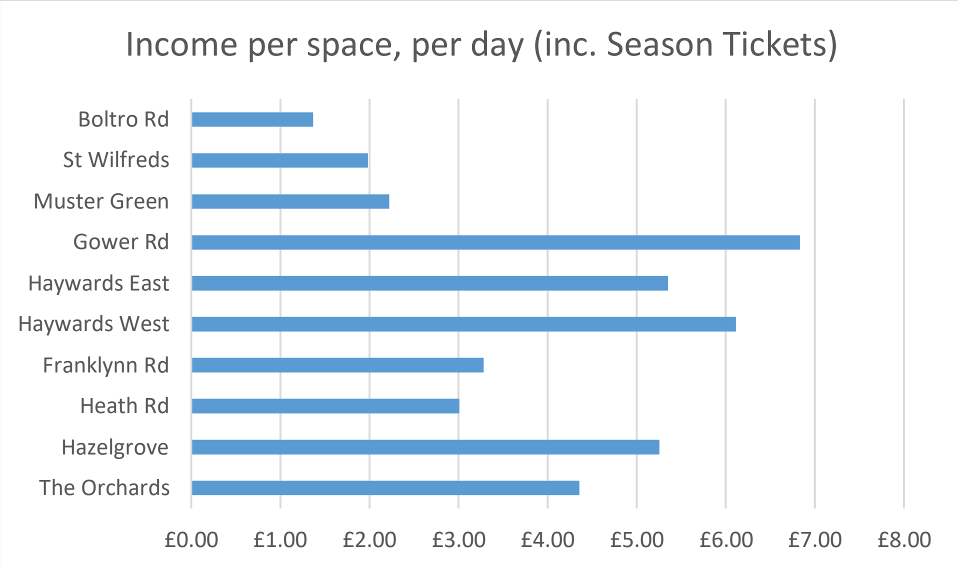
Name	Spaces	Income 17/18 (inc seas.)	Trans. 17/18	tr. /spa. /p.a.	tr. /spa. /p.d.	£ /spa. /p.a.	£ /spa. /p.d.	£ /tr.	Seas.
The Orchards	208	£282,658	237522	1142	3.66	£1,358.93	£4.36	£1.19	
Hazelgrove	116	£190,170	168245	1450	4.65	£1,639.39	£5.25	£1.13	
Heath Rd	108	£101,349	37297	345	1.11	£938.42	£3.01	£2.72	
Franklynn Rd	75	£76,788	54027	720	2.31	£1,023.84	£3.28	£1.36	6
Haywards West	47	£89,661	75216	1600	5.13	£1,907.67	£6.11	£1.19	
Haywards East	49	£81,822	74981	1530	4.90	£1,669.84	£5.35	£1.09	
Gower Rd	20	£42,621	39187	1959	6.28	£2,131.04	£6.83	£1.09	
Muster Green	30	£20,811	3523	117	*2.25*	£693.69	£2.22	£1.38	29
St Wilfrids	8	£4,950				£618.75	£1.98	£1.19	9
Boltro Rd	80	£34,100				£426.25	£1.37	£1.13	62

The three ‘central’ car parks; The Orchards, Hazelgrove and Heath Rd vary considerably. Hazelgrove is the busiest with 4.54 transactions per space per day and this is reflected in its yield of £5.25 per space. Heath Rd is quiet in terms of transactions although the value of the transactions is higher, suggesting that it is fulfilling its role as providing some long-stay parking. Given the Orchards location adjoining the shopping centre, size, and prominence, the yields and number of transactions could be considered low for example when compared to Queensway in East Grinstead.

The four smaller ‘southern’ car parks are much smaller and strung along South Rd and Franklynn Rd. Transaction and income data suggests they are reasonably busy. Gower Rd has an unusual layout with a road bisecting it. This road is not public highway according to the WSCC online map, but there is an adopted pedestrian route running through the site, north to south. Gower Rd in particular, has a high number of transactions and yields the highest income per space per day of any car park in Haywards Heath.

The permit only car parks; St Wilfrids, Boltro Rd, and Muster Green, yield very little in terms of total income or income per space. Often there are good policy reasons to maintain season ticket only car parks, although from our policy review there does not appear to be a stated objective to support this in this case. Of course, it does not follow that conversion to P&D would result in any significant increase in usage or income given their sub-prime locations. Boltro Rd is within comfortable walking distance to the station so permit may well be the most appropriate use (there is a premium price of £750.00 p.a. for season tickets). Muster Green anecdotally provides a service to local businesses (namely estate agents). For the days where Muster Green is available as a P&D (Saturdays) its yield per space is on a par with Hazelgrove and Franklynn Rd, so the potential for Muster Green to operate as P&D would appear to be higher. St Wilfrids is very small, and any change would likely need to form part of a developed Orchards scheme.

Figure 19: Income per space per day



As with the other towns the off-street car park estate is remarkably well maintained in comparison to the estates we have seen elsewhere in the country with clear signage and lining and very little of the clutter often associated with local authority-owned car parks.

7.2 Summary and Phase 2 work

There are clear opportunities for the parking estate to contribute to ongoing plans for regeneration and development within the town especially around the Orchards. The estate is unevenly spread with very little in the north of the town or near the station. By far the biggest car park in the town is not owned by the Council but by Network Rail. The station has a total of 1,045 parking spaces of which 826 are in a large MSCP which casual monitoring of the website seems to report as 'full' on most days[32]. The MSCP on its own represents more spaces than the whole of the Council's estate in the town. There are reports of a two-tiered approach whereby spaces in the 'premium' section is empty, but the Council has no control or influence over this in any case.

A key focus of the future Strategy will be to identify development opportunities and disposals as the estate clearly has some potential to support improvements to townscape and provide better value to the Council and will play an important role in enabling any proposals that come forward from the Haywards Heath Town Centre Masterplan.

[32] https://www.sabaparking.co.uk/car-park/haywards-heath-station-car-park

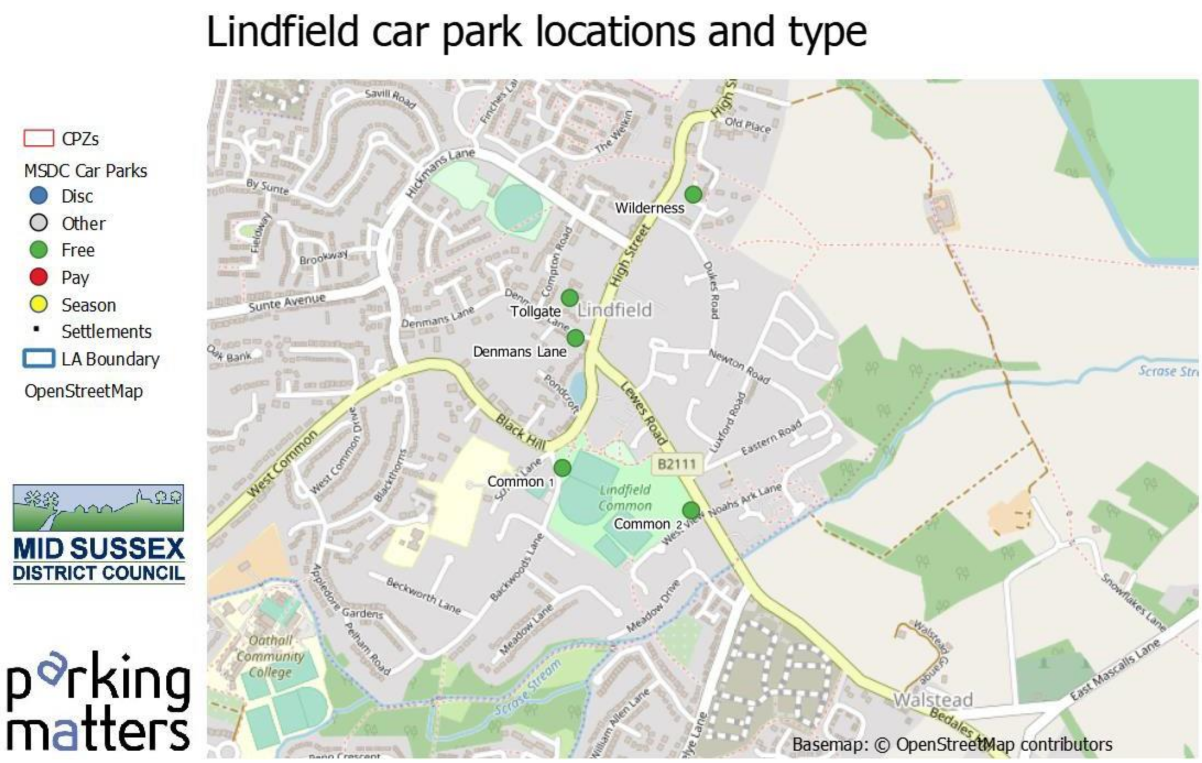
8. Other Settlements and Rural Car Parks

The remainder of the parking estate lies within smaller settlements. None of these are charged-for, but most have limits on user type or length-of-stay. They represent a maintenance and enforcement cost to the Council. In some cases, they may be providing an important local function, providing access to shops and services, but there have been reports and anecdotes of misuse; 'disc tampering', overstaying, and use as general resident parking. There are anecdotes of informal park and ride to mainline stations at Lindfield and Hassocks but this cannot be confirmed.

8.1 Lindfield

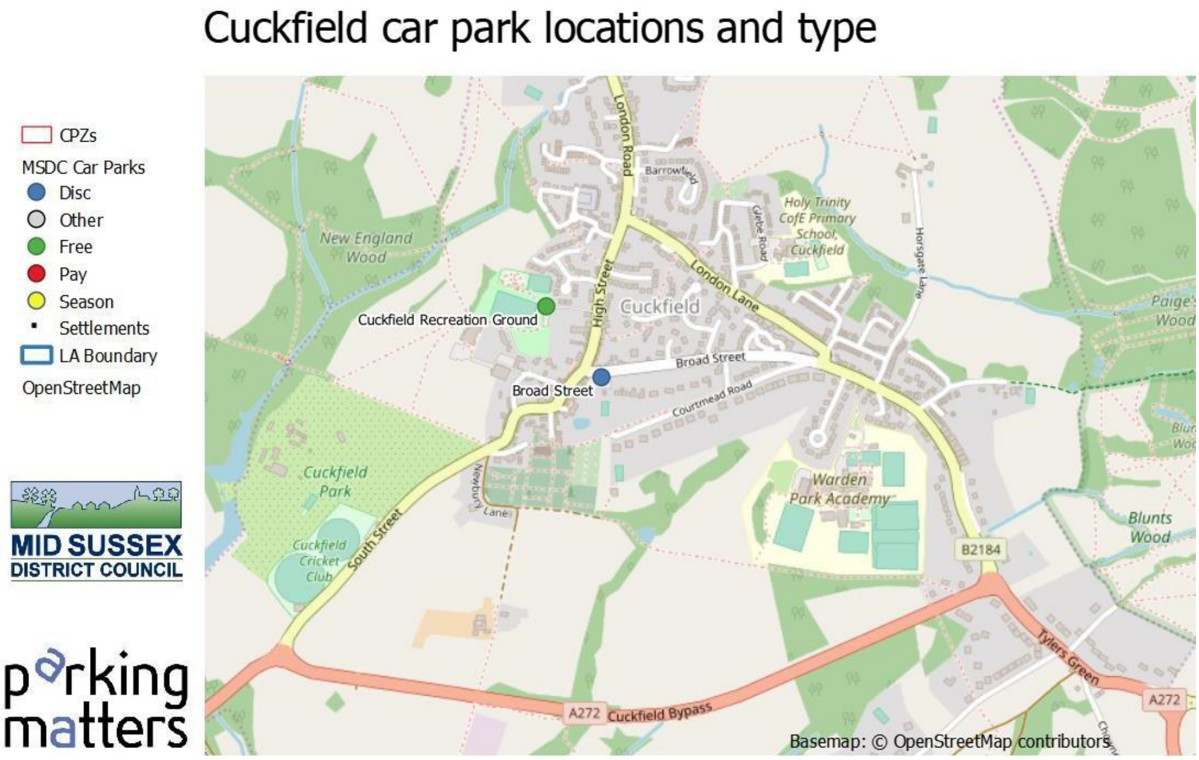
Lindfield has five car parks, all of which are free with some restrictions. Tollgate car park has a maximum stay of four hours and serves a clinic. There are reports from the parking team that this car park is usually full in the day. 6 of the 23 spaces are reserved for 'doctors' via a permit scheme, although there are 10 doctors permits. 3 spaces are given over to blue badges (also usually full), and a small bay on the highway approaching the car park provides space for 3 medium sized cars, marked out as 'for flats' to serve the flats adjoining to the north. Nearby Denmans Lane is another small car park close to the village centre and is also reportedly very busy.

The Wilderness Car Park is located in the north of the village and is limited to 23hrs. There are no shops or services nearby apart from some small offices and a public house. There is anecdotally an impression that residents are simply using the Wilderness to park additional cars as on-street parking is restricted on the High St. The Wilderness provides access to the church car park to the north so there is very limited scope to use the space for another use. Finally, two car parks serve Lindfield Common and again, local reports suggest they are busy and often used by local residents simply as a place to park their cars overnight.



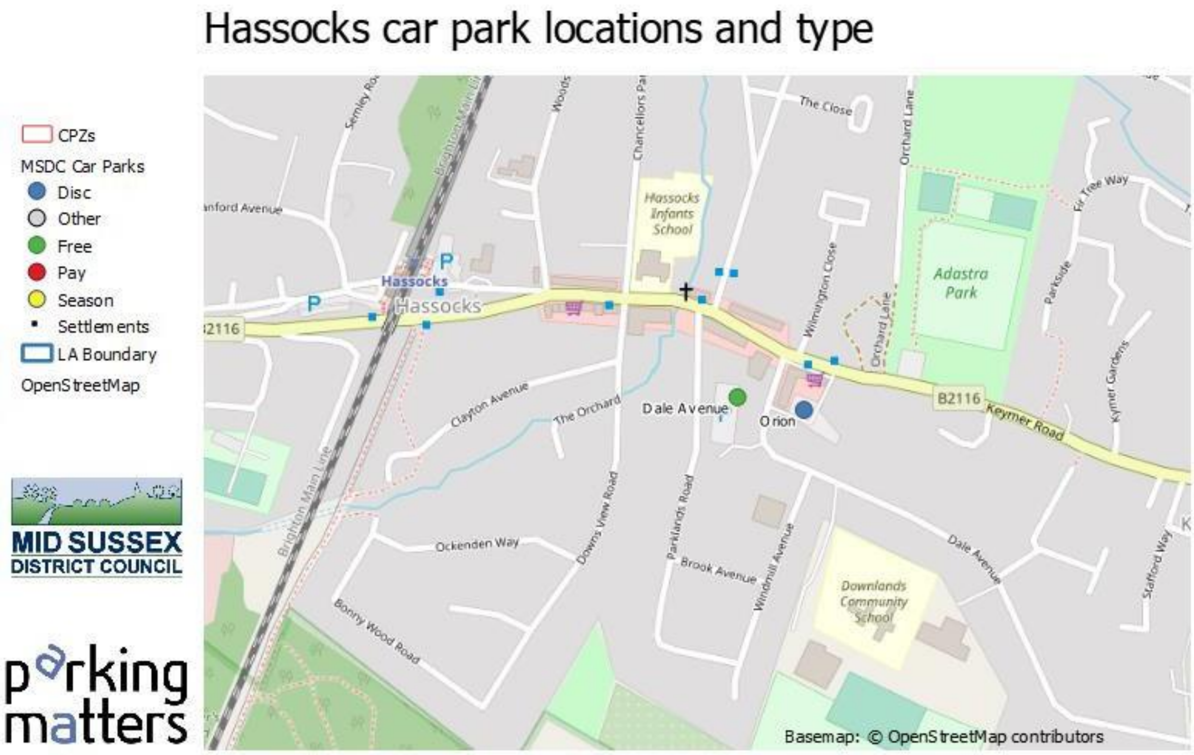
8.2 Cuckfield

There are two car parks in Cuckfield. Broad St Car Park provides long and short stay parking with the later controlled by disc parking. Users can purchase a disc in a local shop and stay for up to 2hrs with no return in 1hr after. Broad street is reportedly busy, not just in the day but overnight. At the time of site visit, the long stay section was almost full but there was plenty of space in the short stay car park. The second car park serves the recreation ground.



8.3 Hassocks

Hassocks has a station on the London – Brighton mainline and anecdotally experiences a good deal of commuter parking as a result. There are two car parks. The first is Dale Avenue, which is reasonably large with 67 free parking spaces and a 23hr maximum stay. The car park was reasonably full on the day of the site visit and feedback is that this is often the case. Orion serves a parade of shops of the same name and has two entrances, a two-way entrance/exit on the west and a one-way entrance to the north. The car park is controlled by parking discs with a 3hr max stay. A row of privately owned garages adjoins along the south east of site and require access though the car park complicating changes to layout or use.



8.4 Hurstpierpoint

Hurstpierpoint has two car parks, the first is large with 121 parking spaces, and appears to serve not only the high street, but the villages' main primary school as well as providing car parking close to a medical centre and the library. The car park is broadly split into two with one half providing short-stay disc parking and the other long-stay parking. At the time of the site visit, the long stay was very busy (about 90% full) with short stay about 70% full.

Brown Twins is much smaller with 40 spaces and is bordered by a large electrical facility. There is a direct pedestrian link to the main retail areas of the high-street and a max stay of 23hrs. The car park is reportedly nearly always full and the site visit and aerial photography support this opinion.

8.5 Summary and Phase 2

All the larger village car parks are reported as busy by stakeholders. Site visits and aerial photography from the three main online mapping systems seem to support this but occupancy surveys are needed if the strategy is to consider what their role should be in the future.

In-depth analysis of the larger village car parks is better suited to Phase 2. This is because whilst the locations, size and relative function of each is generally known, the real questions are best posed as challenges to policy and regimens for example; is it reasonable for the Council to be expected to maintain and enforce car parks which it does not charge for? Is there misuse and how can this be reduced?

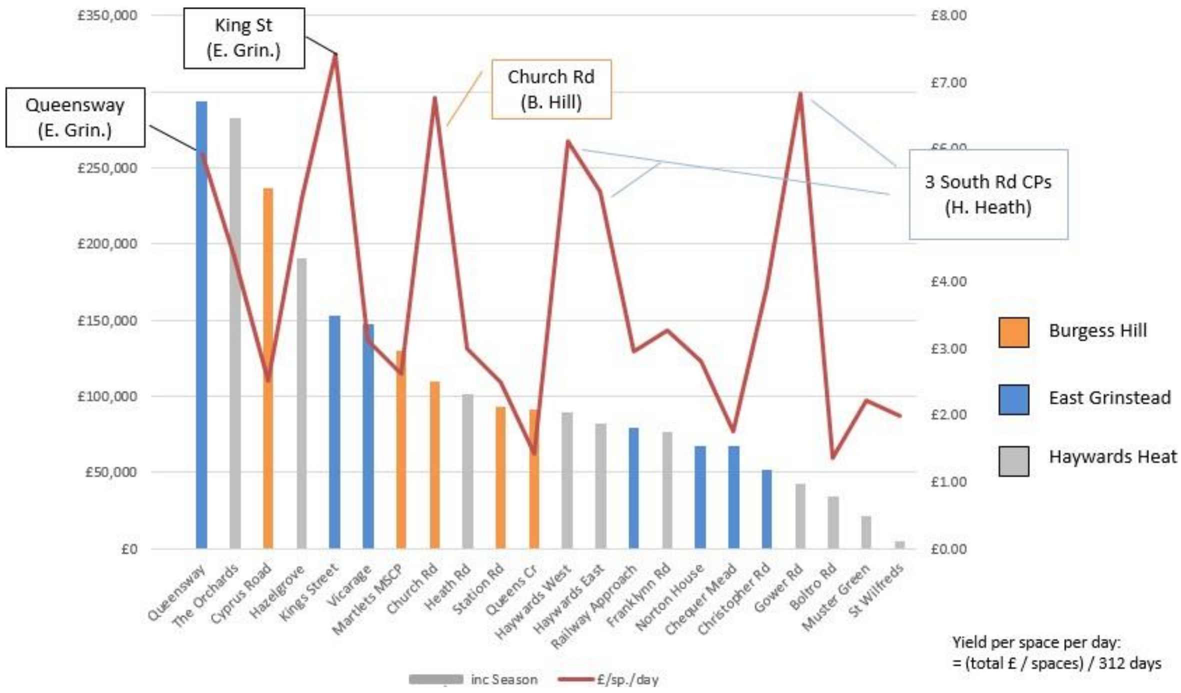
9. Off-street parking summary

Figure 20 shows a pattern that is unlikely to surprise anyone familiar with the off-street parking estate in the District, with the largest car parks representing the largest source of income. However, when compared to the yield per space the pattern is very different.

Figure 20: Total Income by car park

Figure 21 shows a different pattern. Whilst the majority of the gross income is generated by the largest car parks, there are six car parks in particular that have high yields per space. This suggests they are busy and often reasonably full. In general, these are smaller car parks close to retail areas. This isn't surprising given the convenience they offer by being sited next to key destinations. That said the difference is quite stark in Burgess Hill and Haywards Heath where the two largest car parks both in size and income are several places down in terms of yield per space. In East Grinstead, this is less the case as Queensway and King Street represent both high income and high yield.

Figure 21: Relative total income compared to daily yield per space



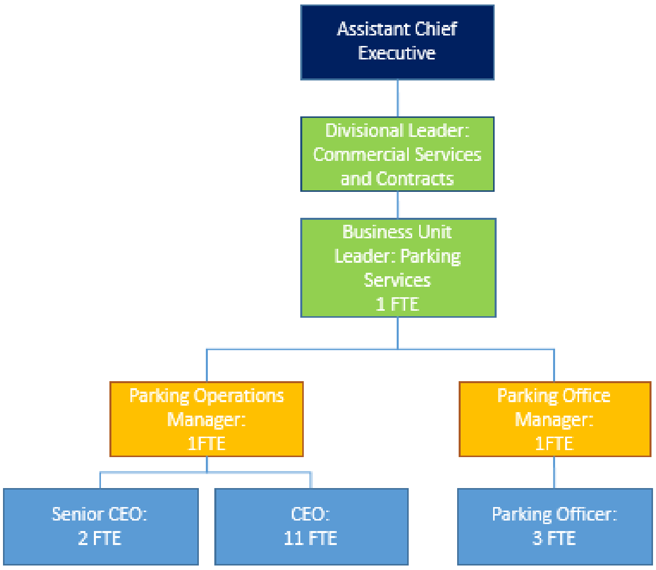
The pattern will become clearer once we have occupancy survey data and will allow us to really consider what the factors are that are playing a part in this pattern.

We have visited most of the car parks now and note that in comparison to the many car parks that we visit in the course of our work the MSDC estate is well maintained. Signage appears to be up-to- date, clutter is generally minimised, and wayfinding is above average based on our observations and experience elsewhere.

10. Team and Operations

A small team is overseen by a 1FTE Business Unit Leader who manages two team leaders. A team of 3 office-based Parking Officers and 13 CEO's supports the work.

Figure 22: Parking Services Team Structure



The team is bigger than the off-street operation would justify because of the on-street enforcement role. There is reportedly very low staff turnover even amongst CEOs.

Cash collection is contracted out to Jades' Securities, a local provider. Parking is now the only service that uses cash collection in the Council. This contract is up for renewal in 2020.

Beats are reactive, utilising local knowledge and responding to local reporting. This approach will be challenged during Phase 2. In Phase 2 we will carry out some benchmarking into PCN rates and cancellation rates.

10.1 Equipment

All of the Council's P&D machines are Parkeon Strada Rapide and were installed in 2018. All allow for card payments. No car parks use ANPR or pay-on-exit technology. Around 2008 an ANPR system was installed at some car parks. The customer experience was poor resulting in public relations difficulties, and it was therefore removed. The machines are out of warranty and cost around £567 per annum to maintain and repair through a contract with the OEM.

The same 'Zebra' hand-held devices are used for on and off-street parking enforcement by the CEOs.

A pay-by-phone service is provided by MiPermit, with a Chipside back-office system. A 10p convenience charge is levied on customers with pay-by-phone (by MiPermit). Bank Processing Charges mean that card transactions cost the Council c19p per transaction, a significant percentage of lower amounts. Residents and season tickets are issued manually but this feature will soon be available in Chipside. The CEO team have access to 1 lease estate car and 4 smaller hatchbacks, and do not use their own cars.

11. On-street interface

Mid Sussex is a District within a three-tier system with the County Council as the Highways Authority and responsible for on-street parking restrictions and ultimately, enforcement. On-street parking restrictions are covered by Traffic Regulation Orders as opposed to Off-Street Parking Orders. West Sussex County Council currently has a contract with the six Districts within the County to enforce on-street parking and waiting on their behalf through Civil Parking Enforcement (CPE).

This current arrangement is under review, and this review will not be finished until March 2020. This represents a potential risk to the successful implementation of operational and back-office aspects of the strategy.

The CPE contract with the County currently funds most of the parking operation in the District. Potentially, the County could decide to take CPE operations back in house (although would most likely outsource), this would have a significant impact on the team and the sustainability of the District's own CPE operations. At present, the operation is approximately a 70/30 split of on and off-street enforcement. Any surplus from enforcement is shared between the County and the Districts on a 70/30 basis.

The current contracts between the Districts and the County do not specify KPIs. Monthly reports were being supplied by the District, however, this was not the case with some other Districts and so these reports are no longer prepared. There are no standards for PCN cancellations for example, leading to an uneven application across the county.

In discussions with the County, their view of the operation in Mid Sussex was very favourable.

11.1 Issues reported to the County

As has been noted in Community Plans and other policy documents, there is considerable pressure on on-street parking and a perception that developments are not providing enough off-street parking provision for their occupiers. East Grinstead was highlighted in particular in our discussions with the County as having on-street parking problems.

On-street parking charges are reviewed regularly with an objective to at least keep up with inflation. This means that the gap between off-street and on-street charges is slowly widening, although arguably in the right direction as off-street is cheaper than on-street.

There is pressure in the tier one towns to control commuter parking, especially around stations. The East Grinstead CPZ is under pressure and the streets adjoining the current CPZ are being reviewed (See 6.1 – Road Space Audit).

There have been some issues around community lead TROs to dissuade commuter parking in other settlements. These have on occasion not been considered holistically between authority tiers in terms of impact and capacity to deliver enforcement resulting in schemes that do not perform as hoped. The example cited is a road with a 1hr restriction which would not only be difficult logistically to enforce but ran the risk of upsetting residents and traders who had forgotten to move their cars.

The County is happy that the Districts and the County are now using the same software packages and all-but-one are using the same pay-by-phone supplier.

The County is aware that it may be time to reconsider some of the waiting restrictions in Haywards Heath as the asset that the road space represents is not well used.

Glossary

ANPR	Automatic Number Plate Recognition	a technology that uses optical character recognition on images (usually a CCTV camera) to read vehicle registration plates
APDS	The Alliance for Parking Data Standards	A not for profit body that Develops, promotes, manages and maintains a uniform global standard to allow organisations to share parking data across platforms worldwide.
AVP	Automated or Autonomous Valet Parking	A system able to take control of a vehicle and to drive it from the drop-off zone to the parking space and from the parking space to the pick-up zone
BI	Business Intelligence	A set of technologies, methods and processes that transform raw data into meaningful and useful information used to enable more effective strategic, tactical, and operational insights and decision-making
BPA	British Parking Association	A not for profit organisation, representing, promoting and influencing the parking and traffic management profession throughout the UK and Europe
CEO	Civil Enforcement Officer	A person employed to enforce parking, traffic and other restrictions and laws in England & Wales.
CIHT	Chartered Institution of Highways & Transportation	A not for profit body that represents and qualifies professionals who plan, design, build, manage and operate transport and infrastructure.
CPE	Civil Parking Enforcement	'Decriminalised' parking enforcement carried out by councils rather than the Police under The Road Traffic Act 1991
DfT	Department for Transport	
ELT	Extract, Load, Transform	A data integration process for transferring raw data from a source server to a data warehouse on a target server and then preparing the information for downstream uses
EV	Electric Vehicles	Wholly electric or hybrid vehicles which are capable of being plugged in order to recharge batteries for electrically powered movement
GDPR	The General Data Protection Regulation	Regulation (EU) 2016/679 - a regulation in EU law on data protection and privacy for all individuals within the European Union (EU) and the European Economic Area (EEA).
	Intelligent deployment	The use of Business Intelligence methods to maximise CEO effectiveness. CEOs are deployed to locations based on the likelihood that vehicles are parked in contravention, based on previously gathered data
	Mobile Monitoring	The use of ANPR mounted on vehicles to monitor large numbers of vehicles in a short period of time.
MSCP	Multi-Storey Car Park	
P&D	Pay and display	A parking system in which a motorist buys a temporary permit from a machine and displays it in the window of the vehicle
PCN	Penalty Charge Notice	A fixed penalty notice issued by a CEO, backed with powers to obtain payment by civil action
PML	Parking Matters Ltd	

RFID	Radio-frequency identification	A system using electromagnetic fields to automatically identify and track tags attached to objects. The tags contain electronically-stored information. Oyster cards and contactless credit/debit cards are examples of this type of system
SAE	Society of Automotive Engineers	A U.S.-based, globally active professional association and standards developing organization for engineering professionals in various industries. Principal emphasis is placed on transport industries such as automotive, aerospace, and commercial vehicles
SMMT	The Society of Motor Manufacturers & Traders	A trade association that supports and promotes the interests of the UK automotive industry at home and abroad. Working closely with member companies, SMMT acts as the voice of the motor industry, promoting its position to government, stakeholders and the media.
UWE	University of the West of England	
VRM	Vehicle Registration Mark	The mandatory alphanumeric registration mark of a vehicle, displayed on a vehicle registration plate
WSCC	West Sussex County Council	The local Highways Authority