MID SUSSEX DISTRICT COUNCIL

Burgess Hill Parking Study

2026 - 2040

June 2026

parking matters

1. Introduction

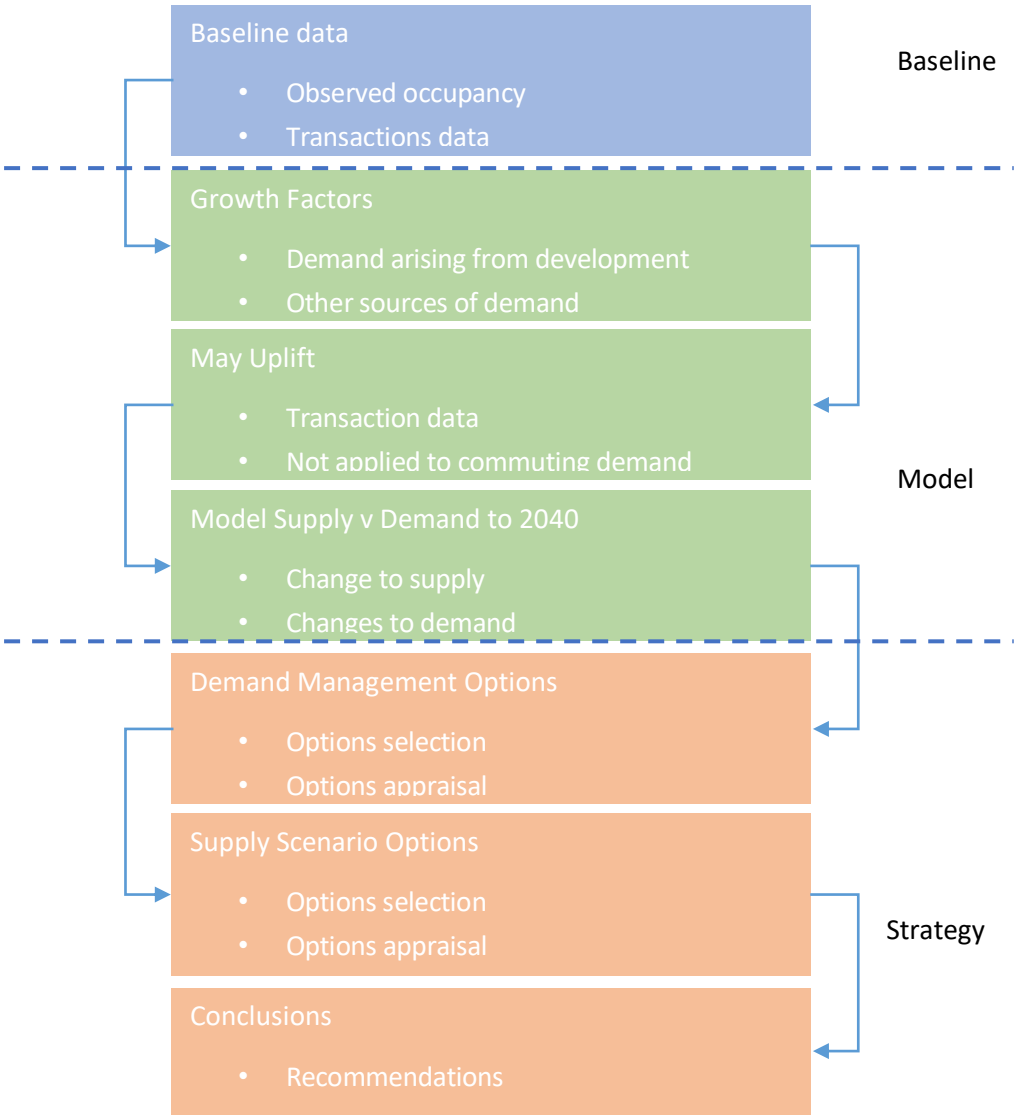
Parking Matters Ltd (PML) have been commissioned by Mid Sussex District Council (MSDC) to consider parking across Burgess Hill town centre and specifically around Burgess Hill Railway Station ('BUG' – as per the three-letter station code).

The study is motivated by the need to consider the impact of the major developments and growth already underway and expected across Burgess Hill over the plan period.

A staged approach for the study was agreed to control the outputs and allow co-operation and feedback between MSDC and PML as follows:

- Stage 1 established supply and demand using occupancy surveys and transaction data.
- Stage 2 forecasted demand to a nominal planning horizon of 2040, accounting for town growth and town centre developments.
- Stage 3 considered options and strategies for dealing with, accommodating or mitigating the change in demand across the town centre and around the station.

Figure 1. Methodology flowchart



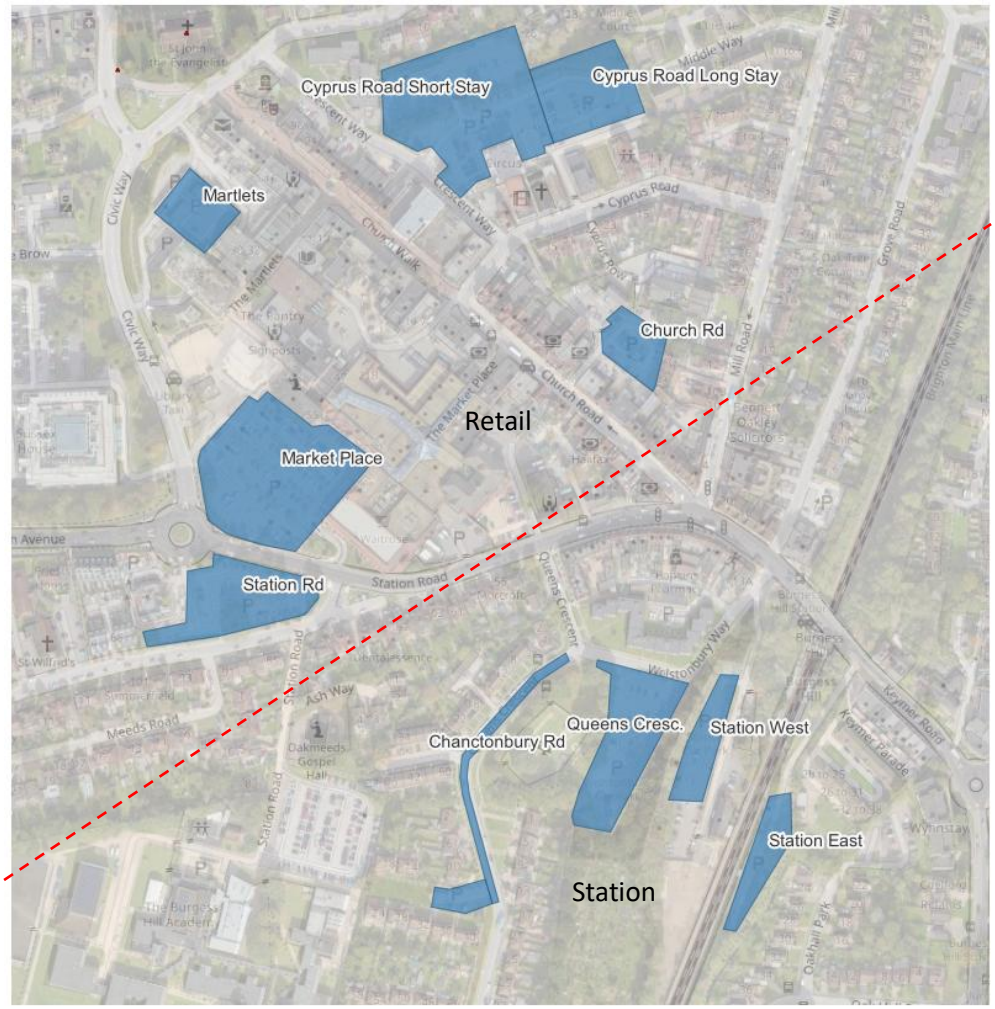
2. Stage 1 – Baseline Data

The first stage of the project includes reviewing the existing parking inventory, analysing usage patterns, and considering seasonal variations. Robust baseline data is critical in establishing current demand, but using transaction data to estimate occupancy is usually unreliable for a number of reasons: it is unclear how many people do not pay or use a permit; the number of cars present outside charging periods is unknown; and customers frequently purchase more time than they use, such as buying 2 hours but staying only 1 hour 40 minutes or paying for a full day but staying just 5 hours, which results in overestimating occupancy.

Due to these limitations, manual beat surveys were conducted to capture accurate and dependable occupancy figures in the week commencing February the 6th. Mid-February is a suitable period for car park usage surveys since people have returned to work and school, and half term is towards the end of the month, whilst retail activity is recovering from January.

2.1 Study area

Figure 2. The study area



The sites are divided into a station cluster and a retail cluster reflecting their purpose and use.

The sites in-scope are:

Figure 3. In-scope sites

Retail Cluster	Spaces	Notes
Cyprus Rd	302	MSDC car park
Martlets	165	MSDC car park
Church Rd	52	MSDC car park
Market Pl	293	Leased from MSDC. Must echo tariffs and restrictions of MSDC car parks.
Station Rd	120	MSDC car park
Station Cluster	**Sp.**	**Notes**
Chanctonbury Rd	38	On-Street and residential parking (estimated)
Queens Cres.	205	MSDC car park
Station West	73	Operated by APCOA on behalf of National Rail
Station East	62	Operated by APCOA on behalf of National Rail

2.2 Survey Results

The results of the beat surveys were:

- Station-area car parks experience commuter pressure with high week–day occupancy. Markedly lower demand on Friday resulting from work-from-home trends. Busy on Saturdays
- The peaks are predictable, around 12:00 is the dominant peak period, this aligns with typical town centre shopping when it combines with commuting demand.
- When applying the demand factor derived from the transaction data most sites become busier.
- Of the retail car parks Market Place is the most popular. Cyprus Rd shows uneven demand focussed on the peak shopping periods around midday.

Figure 4/5. Beat Survey Results

				THURSDAY			FRIDAY			SATURDAY		SUNDAY
			09:00	12:00	16:00	09:00	12:00	16:00	19:00	12:00	19:00	12:00
Site	**Section / Note**	**Capacity**	*Commuter*	*Peak*	*Shoulder*	*Commuter*	*Peak*	*Shoulder*	*Leisure*	*Peak*	*Leisure*	*Leisure*
Cyprus Rd	Long Stay	92	3	31	14	7	31	17	9	48	2	23
Cyprus Rd	Short Stay	210	39	79	27	36	94	54	41	133	41	64
Martlets	All levels	165	4	16	5	1	10	2	4	10	1	5
Church Rd	Whole site	52	45	38	38	15	53	35	10	52	13	28
Market Pl	Whole site	293	114	157	81	57	176	141	49	175	37	122
Station Rd	Excluding McD	120	34	60	42	27	35	21	13	27	15	14
Chanctonbury Rd	On-Street	31	29	31	22	24	35	21	13	27	15	14
Queens Cres.	Off-Street	205	88	119	104	29	50	36	42	55	55	40
Station West	Railway Co.	73	53	72	55	40	48	35	22	27	24	22
Station East	Railway Co.	62	62	57	62	21	26	25	21	22	25	13

				THURSDAY			FRIDAY			SATURDAY		SUNDAY
			09:00	12:00	16:00	09:00	12:00	16:00	19:00	12:00	19:00	12:00
Site	**Section / Note**	**Capacity**	*Commuter*	*Peak*	*Shoulder*	*Commuter*	*Peak*	*Shoulder*	*Leisure*	*Peak*	*Leisure*	*Leisure*
Cyprus Rd	Long Stay	92	3%	34%	15%	8%	34%	18%	10%	52%	2%	25%
Cyprus Rd	Short Stay	210	19%	38%	13%	17%	45%	26%	20%	63%	20%	30%
Martlets	All levels	165	2%	10%	3%	1%	6%	1%	2%	6%	1%	3%
Church Rd	Whole site	52	87%	73%	73%	29%	102%	67%	19%	100%	25%	54%
Market Pl.	Whole site	293	39%	54%	28%	19%	60%	48%	17%	60%	13%	42%
Station Rd	Excluding McD	120	28%	50%	35%	23%	29%	18%	11%	23%	13%	12%
Chanctonbury Rd	On-Street	31	94%	100%	71%	77%	113%	68%	42%	87%	48%	45%
Queens Cres.	Off-Street	205	43%	58%	51%	14%	24%	18%	20%	27%	27%	20%
Station West	Railway Co.	73	73%	99%	75%	55%	66%	48%	30%	37%	33%	30%
Station East	Railway Co.	62	100%	92%	100%	34%	42%	40%	34%	35%	40%	21%

Figure 5. The 09:00 count aims to identify commuters before shoppers have arrived.

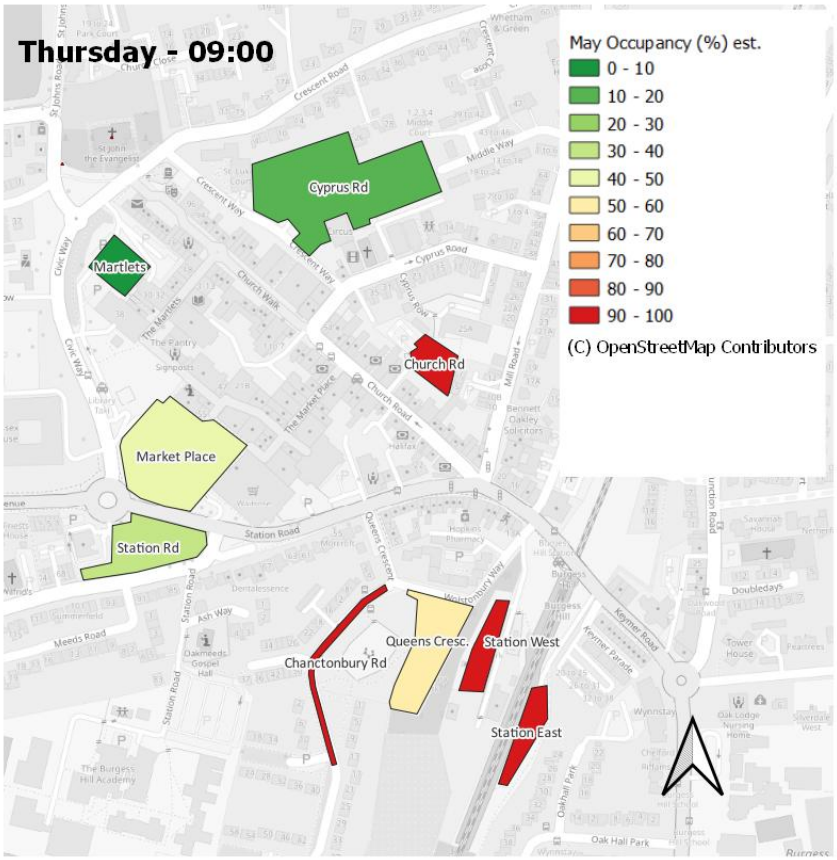


Figure 6. 12:00 midday is the peak occupancy in most town centre car parks across the country.

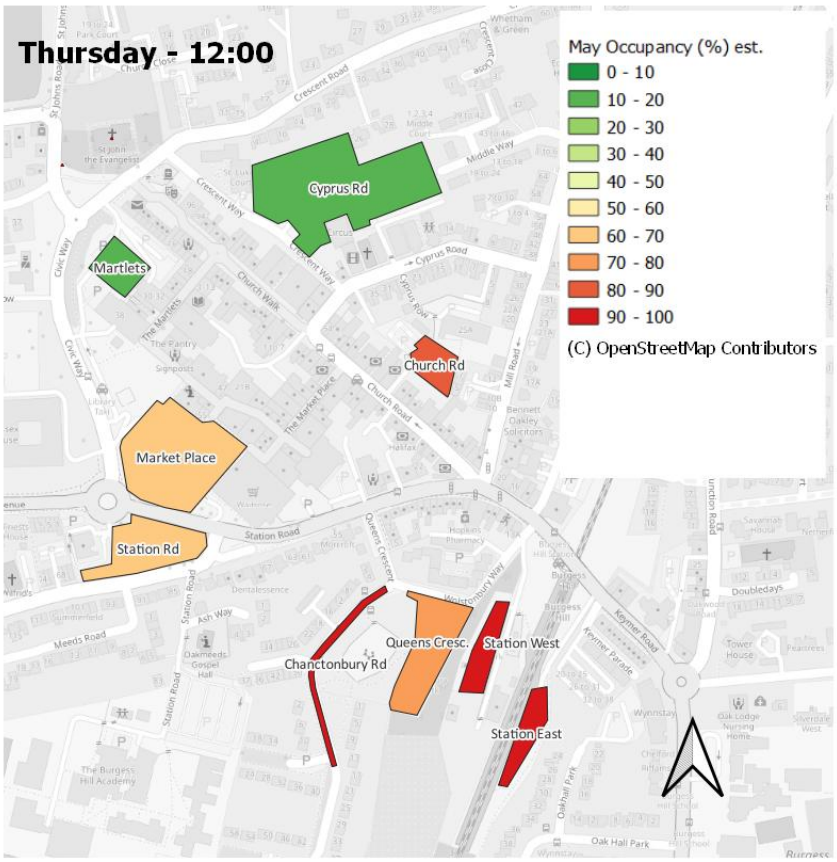


Figure 7. The Saturday 12:00 count will often show town centre car parks at their busiest for retail activity.

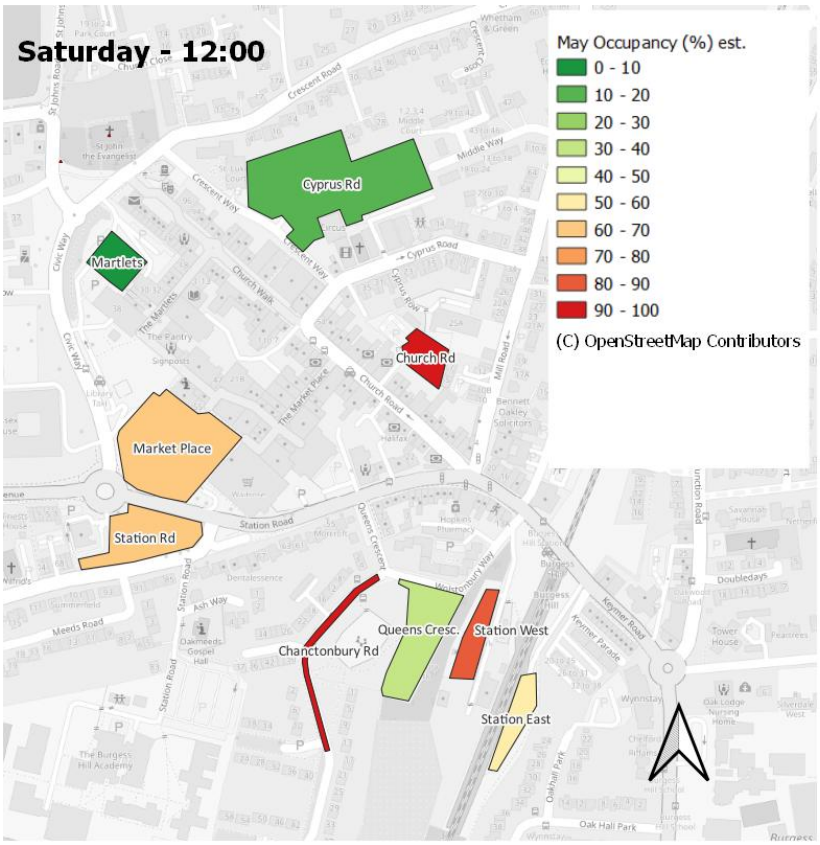
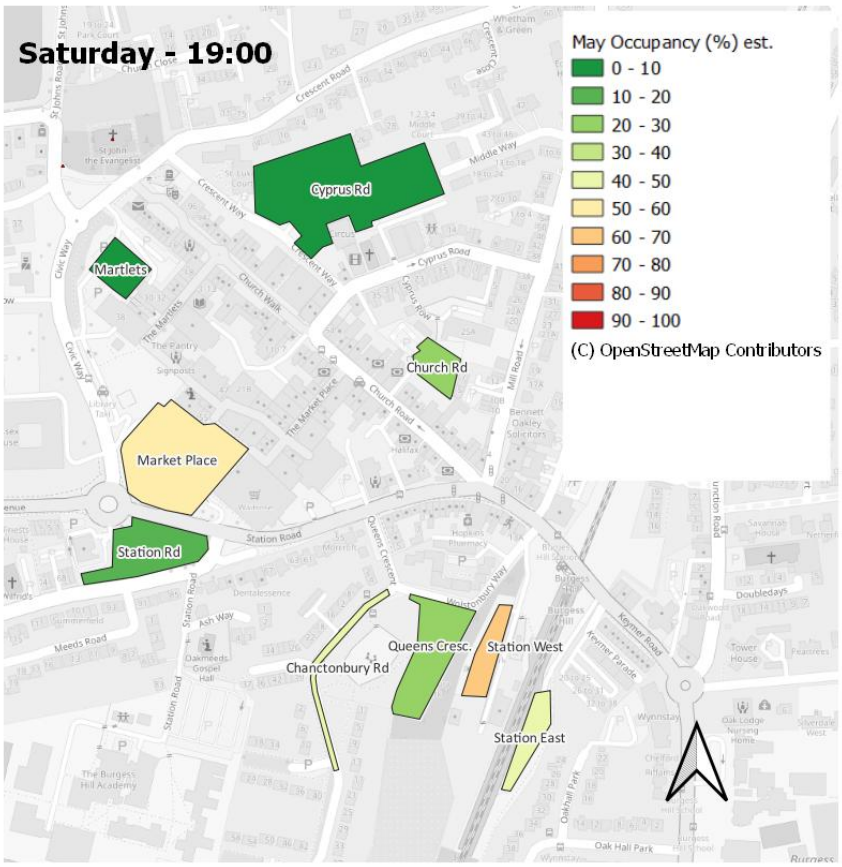


Figure 8. An evening survey provides information on the evening economy and usage outside of charging hours that may otherwise not be picked up in transaction information.



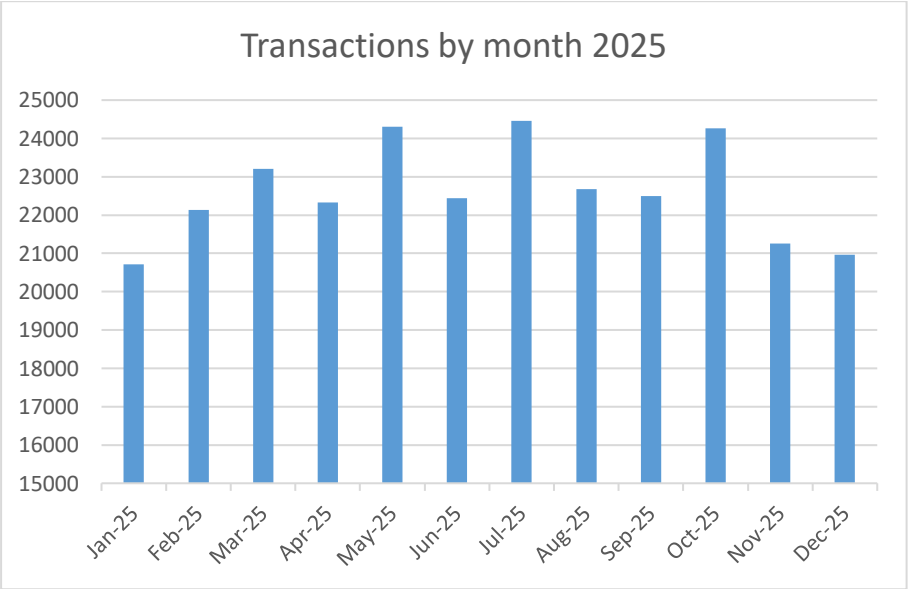
2.3 Seasonal Demand

In most town car parks across the country demand is uneven across the year with peak months different for various reasons, for example:

- Major employment centres may see peak months Feb-Jul and Oct – Nov, outside school holidays and shoulder periods
- Major retail centres are likely to see peaks in December due to Christmas shopping
- Major tourist destinations are likely to see peaks around Easter and August, during the school holidays.

In the town centre sites, occupancy is higher in July, May and October, with February, April, June, August and September showing average demand and December and January showing lower demand. The difference between Feb and the peak months is around 1.18.

Figure 9. Monthly transactions in MSDC car parks from MSDC data



In the Station cluster, the trend of higher summer occupancy is slightly reversed with information from the 2024 Station Parking Scoping Study (Parking Matters Ltd, for MSDC), showing a slight decrease in demand over the summer months, around 0.9.

This seasonality requires sensitivity testing (to be carried out in the future demand model) to account for the difference between the observed February occupancy and the busier months of May, July and October.

2.4 Baseline Conclusions

Overall conclusions around baseline supply and demand:

- Supply is ample across the MSDC sites retail cluster; with a maximum observed occupancy of 42% at 12:00 on Saturday
- Market Place is busier, reflecting its central and convenient location next to the shopping arcade.
- The station cluster is 75% full with especially strong demand on weekdays for rail commuters.

Figure 10. Occupancy by cluster

		THURSDAY			FRIDAY				SATURDAY		SUNDAY
		09:00	12:00	16:00	09:00	12:00	16:00	19:00	12:00	19:00	12:00
Site	*Capacity*	*Commuter*	*Peak*	*Shoulder*	*Commuter*	*Peak*	*Shoulder*	*Leisure*	*Peak*	*Leisure*	*Leisure*
Town Centre MSDC	639	125	224	126	86	223	129	77	270	72	134
Market Place	293	114	157	81	57	176	141	49	175	37	122
Station Cluster	371	232	279	243	114	159	117	98	131	119	89

Figure 11. Max occupancy by cluster

Highest Observed	Capacity	Max	Max %	When
Town Centre MSDC	639	270	42%	Saturday 12:00
Market Place	293	175	60%	Saturday 12:00
Station Cluster	371	279	75%	Thursday 12:00

Note: Market Place is shown separately in the above tables to highlight the site to the reader given its size and importance. It is included in the Town Centre cluster in the rest of the report.

3. Stage 2 - Future Demand Assessment

In considering future demand there are three key sources of information which are supplemented by other techniques as discussed throughout this section. The main sources are:

- AECOM, Northern Arc Transport Assessment[1], 2019 (update for Homes England). This uses TEMPro and TRICS to consider trip generation, junction modelling, and mitigation of the impact of the development. (Referred to as the 'AECOM Report').
- Connect Consultants, Martlets Shopping Centre Transport Assessment, 2019, submitted as part of the planning application for the redevelopment of the Martlets, including the MSCP (Referred to as the 'Martlets TA').
- Parking Matters Ltd and Richard Talbot, Car Park Scoping Study at Burgess Hill Station, 2024, , which considered the feasibility of a new 275 MSCP at Burgess Hill Station. (Referred to as the '2024 PML Study').
- CBRE, Burgess Hill Train Station Development Feasibility Study 2020, (Referred to as the '2020 CBRE Report').

In considering categories of demand and having considered the previous reports we can discount education demand and identify the following specific categories of demand for the town centre car parks:

- Rail parking demand, and any specific demand arising from the development within the area, to the rail cluster
- Retail, town centre commuters and leisure demand, to the retail cluster
- Background growth arising from windfall development, background population and economic growth.

This section considers each category of growth in turn.

Although the demand will increase gradually and fluctuate, a planning horizon of 2040 is used to reflect the draft District Plan. Specifically, this is for a weekday (Tue/Wed/Thu) in a typical demand month (February, April, June) at 12:00 which is chosen because it is currently the busiest time across the town centre and so acts as a stress test for capacity against demand.

3.1 Rail Parking Demand

Rail trends have been severely disrupted by Covid-19. Burgess Hill (BUG) has not yet recovered from the reduction in journeys brought on by Covid-19, although Wivelsfield (WVF) is now back to pre-Covid levels. Nationally rail passenger numbers have recovered and are already higher than in 2020. Network Rail predicts annual passenger use at Burgess Hill and Wivelsfield will only reach 2019/20 demand in around 2040 (2024 PML study).

The graph below shows trends in estimated demand. The left-hand axis is in millions, showing Burgess Hill and Wivelsfield and the right-hand axis is in billions showing the national trend.

[1] Northern Arc is now referred to as Brookleigh

Figure 12. Est. Station entries exits. Source: Office of Road and Rail

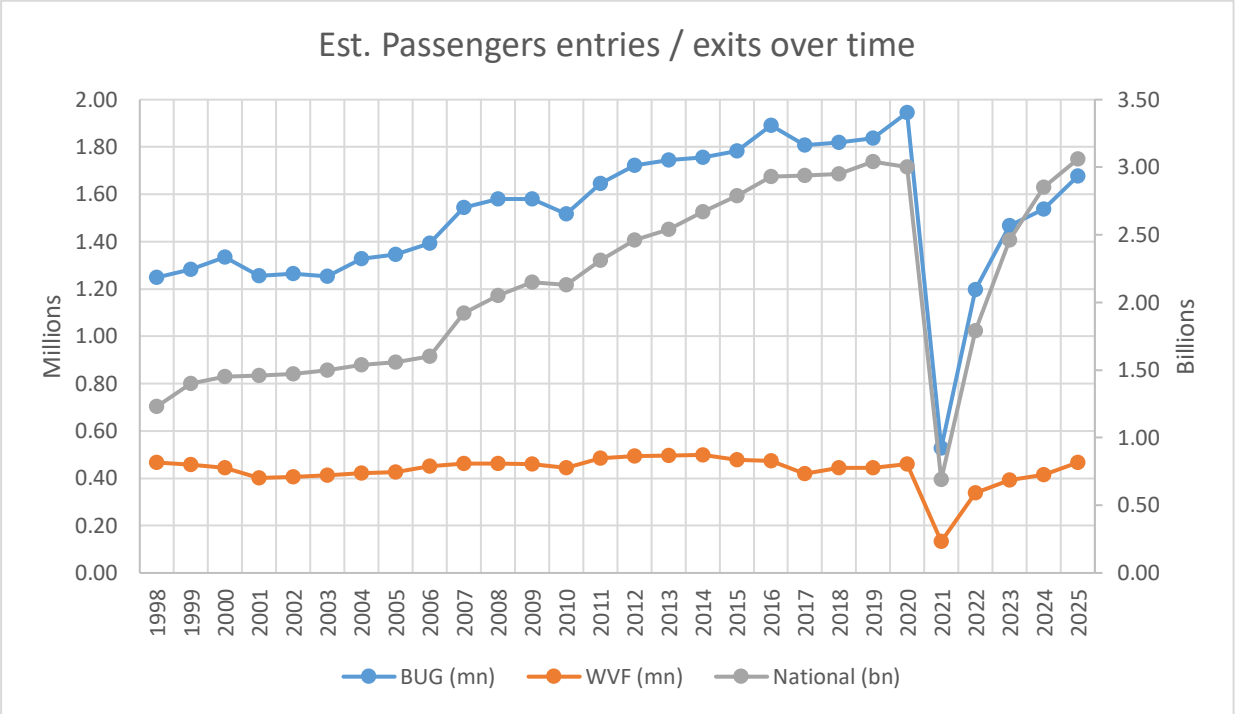
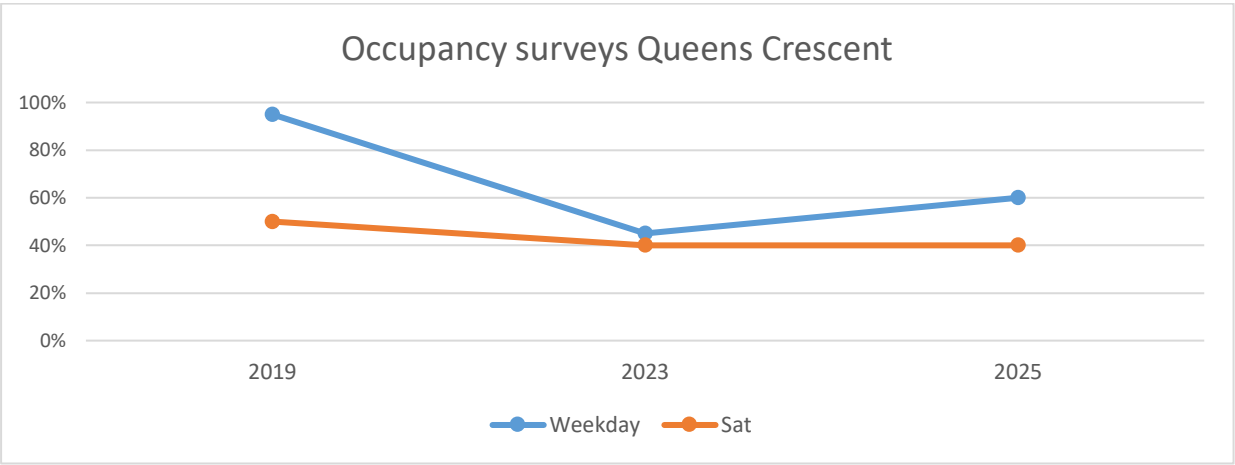


Figure 13. Occupancy surveys carried out at Queens Crescent in recent years.



Demand at Queens Crescent also seems not to have recovered from the pandemic but, at around 60% full, still demonstrates strong demand for parking at the station.

Rail demand has been volatile since the pandemic and there is currently no robust local evidence to justify applying a Burgess Hill specific change to rail parking demand beyond the published forecasts in the 2024 PML Study (see 3.1.2 below).

3.1.1 The 2020 CBRE Report

The CBRE Report considers the 6 acres of land around Burgess Hill Station itself, split across three land owners. It proposes 240 homes and c. 350 parking spaces across the area. Car Parking is listed as a constraint, and it is recognised that 'sufficient space' is required. A concept plan includes a ~340 space MSCP with 50 spaces for residents, improved taxi and drop off and pick up ('kiss and ride') facilities. The initial feasibility found that the MSCP may present an attractive investment opportunity for an institutional investor; a view that was refined by the 2024 PML Report.

It is assumed in the demand assessment that there will be no rail commuter parking demand arising from the development and that residential parking demand will be 'on plot' e.g. in undercroft parking.

Demand arising from the commercial space (5,000 ft2 or 460m2) depends on the type of development proposed. Within a town centre context, 420m2 translates into 2-3 retail units (café / sandwich shop) and 4-5 workshop / studios. Considering the TRICS outputs in the Martlets TA this likely represents very low additional parking demand as the retail will be serving residents / commuters who are very likely to arrive on foot and the commuter demand to the workshops logically could arrive by none-car modes given the location. The numbers calculated from TRICS are so low and uncertainties about what the units will be are high, there seems little value in calculating exact numbers with such a low certainty.

3.1.2 The 2024 PML Report

The 2024 PML Study considered the feasibility of a new 275 space MSCP at Burgess Hill Station within the context of trends in rail use and potential future demand. The conclusion was that c.290 spaces in total would be required to satisfy demand given Covid and other changes.

The 2024 PML Report concluded that it was too early to know what the impact of the strategic development may have on BUG parking demand, although during our work it was noted that this background demand was likely already included in the Network Rail figures.

The overall conclusion of the 2024 study was that the capital investment required for a 275 space MSCP made the project economically unfeasible without subsidy. The question was not of demand but the cost of an MSCP as specified against the likely revenue at expected tariffs. Construction was estimated at c.£14k per space, a total of c.£7.3m, with revenue estimated at c.£372k p.a. Taking account of operating costs, this resulted in an estimated development shortfall of c.£4.3m based on future rental value.

3.1.3 The AECOM Report

In order to assess the impact on the rail network the AECOM Report used Census 2011 Journey to Work data for travel by rail extracted for Mid Sussex MSOA's 012, 013, 014 and 015. Using Google Route Planner, each workplace destination was assigned either a northbound or southbound direction of travel from the Burgess Hill Brookleigh development. It was calculated that 79% of people would travel northbound while 21% would travel southbound.

The AECOM Report concluded that it was likely that little of the Brookleigh development will use Burgess Hill station given the location and distance between the proposed development and the two railway stations. A nominal 10% was estimated to use Burgess Hill station. The AECOM report identifies the number of additional passengers anticipated at each railway station in the AM peak (08:00-09:00) in 2033 as below:

Figure 14. Table 91 from the AECOM report

Table 91		Burgess Hill	Wivelsfield	
	No trips	Add. px /train	No. Trips	Add. px/train
Northbound	13	2	113	23
Southbound	3	1	30	10
Total	16	-	143	-

Figure 15. Table 92 from the AECOM report

Table 92		Burgess Hill	Wivelsfield	
	%	No. Trips	%	No. Trips
Vehicle	50	8	50	72
Bus	25	4	25	36
Bicycle	25	4	25	36
On Foot	0	3	0	0
Total	100	16	90	143

The following improvements are either already committed or suggested through the Transport Assessment (TA):

- Additional cycle parking at Wivelsfield Station
- Pick-up/drop-off facility at Wivelsfield Station
- Additional cycle parking at Burgess Hill Station.

3.1.4 Assessment of Parking Demand for Commercial Units

The parking demand generated by the proposed commercial space - totalling 5,000 ft² (approximately 460 m²)—is highly dependent on the nature of the development. In the context of a town centre, a space of 420 m² would typically accommodate two to three retail units, such as cafés or sandwich shops, and four to five workshop or studio units.

When considering the TRICS outputs appended to the Martlets Transport Assessment, this configuration suggests that the additional parking demand attributed to these commercial units is likely to be minimal. The retail units would be expected to primarily serve local residents and commuters, who would arrive on foot due to the central location. Similarly, the commuter demand for the workshop and studio units could reasonably be met by modes other than private cars.

The calculations derived from TRICS indicate such low levels of demand that, coupled with substantial uncertainty regarding the final mix and use of the units, it is not considered possible to calculate precise parking numbers. The certainty of the figures is too limited to justify detailed quantification at this stage.

3.1.5 Rail Demand Conclusions.

Drawing on the findings from the 2024 PML Report, the AECOM report, and the Network Rail estimate, the total additional rail demand projected to 2036 has been assessed (starting from a 2026 base).

Using Network Rail data, the 2024 Report predicted a total demand for rail parking of 299 in 2036. This is an increase of 51 over the 2026 baseline (or an increase 5.1 per year). As a number for 2040 is not available, using the 5.1 increase per year we have calculated total additional demand as 71 to 2040 based on the increase of 5.1 per year between 2026 and 2036. Adding the 8 spaces attributable to planned growth at Brookleigh, 4 from LWBH and 5 from Sayers Common gives a total of 88.

3.2 Town Centre Commuter Demand

The AECOM Report assessed combined trip generation by purpose and mode for the Brookleigh development. The analysis can be found in tables 33 and 34 of that Report and estimates total business / commuting trips at 593 08:00 – 09:00 with 383 of these being car drivers. The tables break down trip purpose and mode share for the 3,040 dwellings but do not include any spatial distribution (town centre, regional, industrial parks, etc.).

Analysis of commuter behaviour in West Sussex indicates that the majority of employed residents travel relatively short to medium distances for work, with car travel being the dominant mode. According to the West Sussex County Council Census 2021 Travel Briefing, 16-74-year-olds in employment predominantly commute by car, with car ownership at 1.44 vehicles per household and two-car households forming 42.1% of the county total. Earlier Census data also shows that nearly two-thirds of West Sussex workers travelled to work by car in 2011, with sustainable modes accounting for only 23.4%. These patterns imply that commuting trips are largely outward journeys rather than town-centre bound.

Based on typical small-town commuting structures in the South East and the high proportion of car-based travel, it is reasonable to assume that only around 10-20% of employed residents commute into their own town centre, with the majority travelling to nearby employment hubs such as Crawley, Brighton, Worthing, and local industrial estates.

Based on ONS workplace flow patterns for small towns, West Sussex mode-share and car-ownership data, and typical South East commuting structures, we have estimated the proportion of residents commuting into their own town centre as 10-20%. A figure of 15% is used to signify the number of new residents who are both commuting by car to the town centre *and* parking in MSDC car parks.

This aligns with high outward commuting to larger employment hubs, limited town-centre employment capacity in market towns, and the dominance of car-based travel.

Based on a 15% estimate of generated commuting trips between 08:00 – 09:00 this results in an estimate of 57 additional parked cars at 12:00 on weekdays (i.e. 15% of 383, assuming they stay all day).

3.3 Town Centre Retail

Utilising TRICS, the AECOM Report considers retail trip generation from Brookleigh at 2,095 per day (Table 33), of which 1,353 will be as car drivers.

There are two issues in using this number to assess parking demand. Firstly, not all trips will be to the town centre; and secondly, most of these will be for 1-2 hours stays not all day. To transpose this figure into the model we need to estimate the proportion of trip generation that will both park in the town centre and will be there at 12:00 hrs on a weekday.

We have considered information from a number of sources to estimate the proportion of trips generated which might reasonably be expected to use the town centre car parks:

- The High Streets Task Force High Street Footfall Review 2023[2] supports a view of households making between 1-2 visits to high streets per week
- Retail telematics group, Sensormatic, puts out-of-town retail visits per household at around 0.5 per week[3]
- Kantar research suggests supermarket trips to be 490m each month, or around 4-5 per week per household[4]
- IDG (for Co-op) suggests convenience shopping at around ~21% of grocery value, or around 2-3 visits per week per household[5].

Considering these sources we have estimated that 20% of retail trips will be to the town centre.

Figure 16. Estimated retail trips by type

	Visits per household p/w	Rounded %
Town Centres	2	20%
Out-of-town	.5	10%
Supermarkets	4	40%
Convenience	3	30%

Considering the occupancy surveys, c.45% of total observed vehicles were observed at 12:00. Our estimate of increased parking demand based on the proportion of retail trips parking in the town

[2] High Street Footfall Review 2023: https://people-places.net/wp-content/uploads/High-Street-Task-Force-Footfall-Report-2023.pdf
[3] https://www.sensormatic.com/en_uk/resources/rp/2025/2024-uk-retail-review
[4] https://www.kantar.com/uki/inspiration/FMCG
[5] https://www.uk.coop/sites/default/files/2025-03/2_IGD_web.pdf

centre is therefore an increase of 175 per weekday and Saturday in MSDC (town centre) car parks at 12:00 on weekdays, assigned to the retail cluster.

3.4 The Martlets Redevelopment

The submitted documents relating to the Martlets redevelopment do not provide a numerical estimate of the increase in parking demand arising from the new hotel (C1), A1/A3 retail, D1 library, or D2 leisure uses.

The Martlets TA describes the methodology for estimating additional demand (A1/A3 uplift factors, TRICS rates for hotel, cinema, bowling, gym, displaced MSCP demand, and a fixed 60-vehicle allowance for smaller Martlets car parks) but does not publish the resulting figures.

The outputs provided are graphical plots of:

- Baseline demand (Figures 3.3 and 3.4)
- Baseline + development (Figure 3.6)
- Waitrose-only scenarios (Figures 3.7 and 3.8)

These show total demand curves but do not state the numerical difference between baseline and post-development.

The TRICS Appendices included in the submission contain raw trip-rate outputs. As the trip rates are given per 100 sqm, trip numbers are obtained by multiplying the trip rates by the approximate GIA of the development.

The uplift assessment has been carefully reconstructed based on the available graphical outputs and the outlined approach, ensuring consistency with the accepted framework.

Figure 17. Superimposed graphs from the Transport Assessment

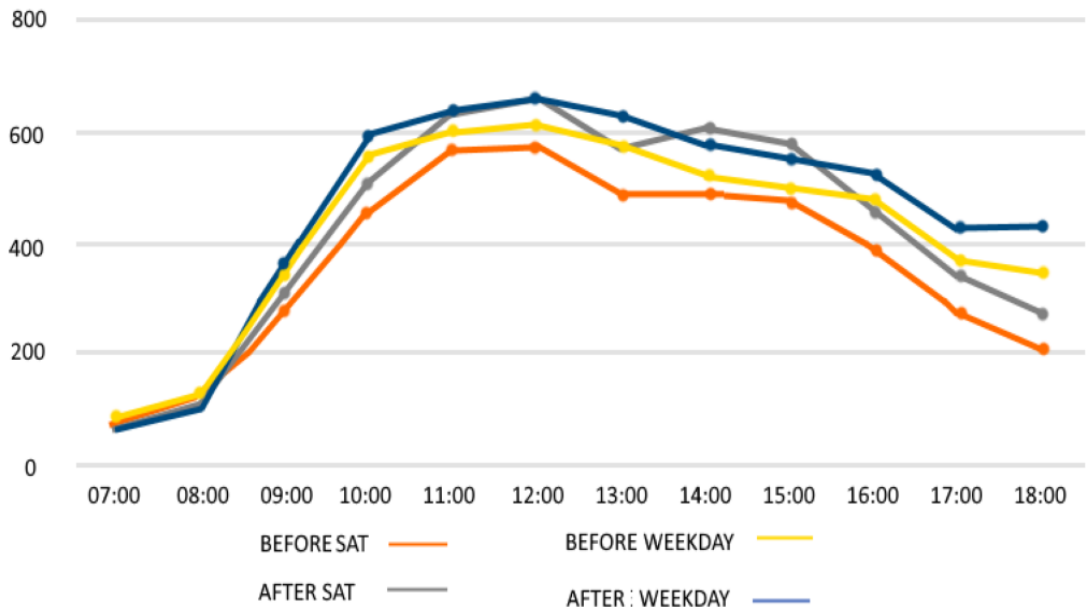


Figure 18. Summary, additional parking demand from the Martlets redevelopment

	BEFORE		AFTER		DIFFERENCE	
	12:00	*18:00*	*12:00*	*18:00*	*12:00*	*18:00*
Weekday	610	355	660	435	**50**	**80**
Saturday	590	200	665	295	**75**	**95**

Intuitively, these numbers appear reasonable given the intensification and change in land use of the site from retail to mixed uses included leisure which show higher usage in the evening. Therefore, the increase in demand at 12:00 in 2040 is estimated at 50.

3.5 Background Growth

TEMPro (Trip End Model Presentation Program) is the Department for Transport's standard tool for accessing and interrogating the **National Trip End Model (NTEM)** dataset. In practice, TEMPro is used in transport studies and assessments to obtain consistent forecasts of *trip ends* (productions and attractions) and derived growth factors by geography, mode, purpose and time period over a range of forecast years.

Users typically extract growth between a base and forecast year for a selected area (e.g., an MSOA or local authority) and apply this to observed/base-model demand so that local modelling uses a nationally consistent view of background growth.

TEMPro's outputs come from NTEM, which combines (a) **planning data** projections for population, households/dwellings and employment, (b) a **national car ownership model** (often referred to as NATCOP) that forecasts household car availability, and (c) **trip rates** (trip-making per person/household segment) derived from national travel behaviour evidence. The core calculation process is: forecast planning variables are allocated to the NTEM zone system and split into person/household segments; car ownership is forecast for those segments; then trip rates are applied to produce trip-end totals by purpose/mode/time period. Where outputs are presented as *productions* and *attractions*, NTEM applies a balancing process so that trip attractions are consistent with productions at the relevant level of segmentation.

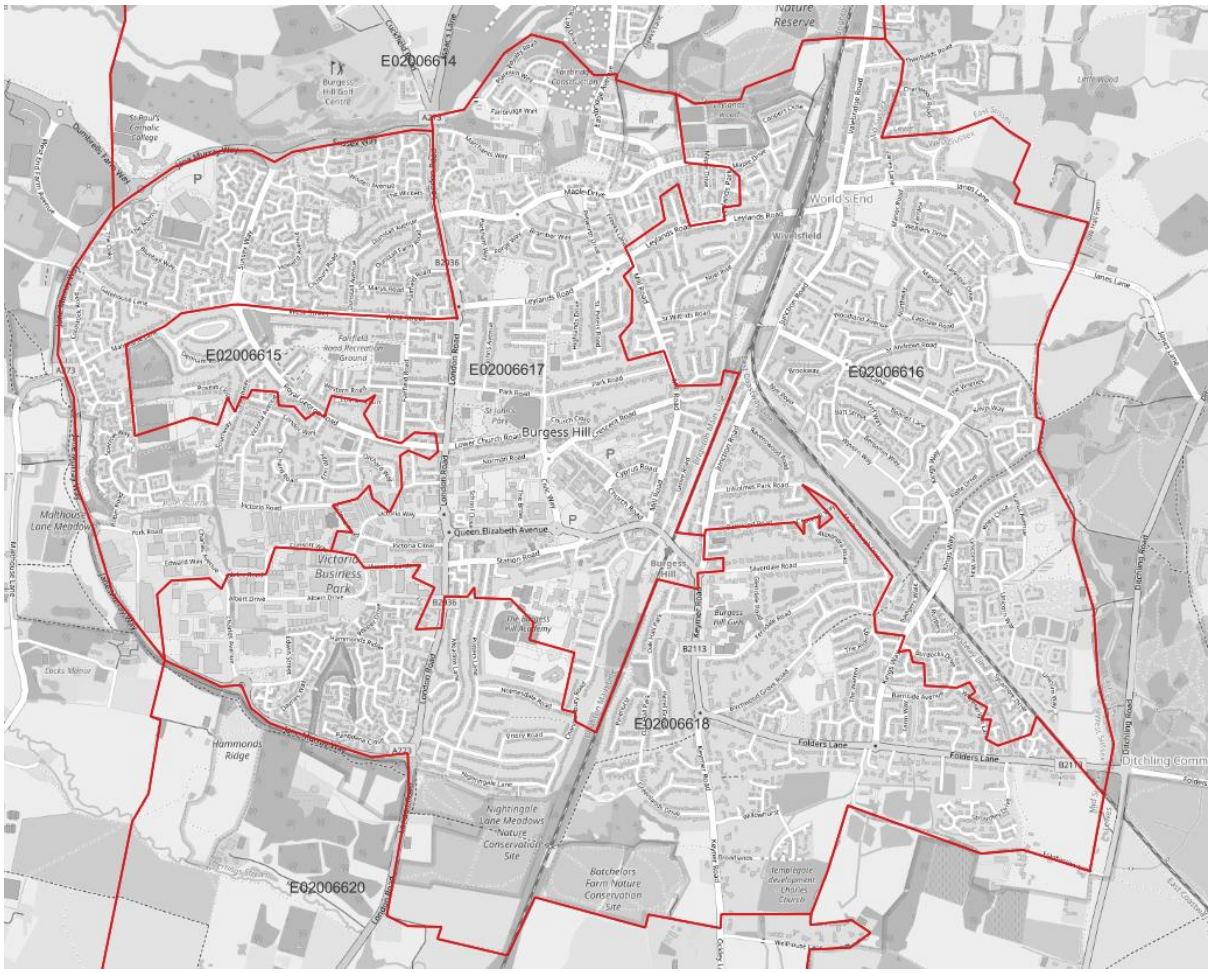
In many applications, TEMPro is used as a ratio model: users extract the NTEM trip-end growth factors for a base year and forecast year and apply the resulting factor to their observed/base demand to represent background growth consistent with Department for Transport TAG guidance. This is the approach we have taken, using the growth factors from TEMPro to act as a proxy for demand change.

In some projects where we have employed this methodology, the result is either very little change or even a reduction in demand. In Burgess Hill's case it is an increase in demand.

Figure 19. NTEM 8.0, trip ends by time period, base year: 2026, future year: 2039, car driver, all purposes

Results	Production	Attraction
Weekday AM peak 0700- 0959	1.0474	1.0469
Weekday Inter peak 1000 – 1559	1.0565	1.0585
Weekday PM peak 1600 – 1859	1.0446	1.0453
Saturday all times	1.0487	1.0531

Figure 20. Middle Super Output Area selection: E02006617



4. Additional testing – West of Burgess Hill / Sayers Common

We have already established a seasonal sensitivity test which takes account of the uplift in busier months of the year based on the transaction data. Two further tests are also required:

- A potential development of approx. 1,350 homes at Land to the West of Burgess Hill (LWBH) (policy DPSC1), in an area west of the A273[6]
- A potential development of approx. 2,500 homes around Sayers Common, west of the A2, (policy DPSC3).

These sites are draft allocations in the Submitted Mid Sussex District Plan 2021-2039 which is currently at Examination. In addition, the Council has been asked to find further housing sites.

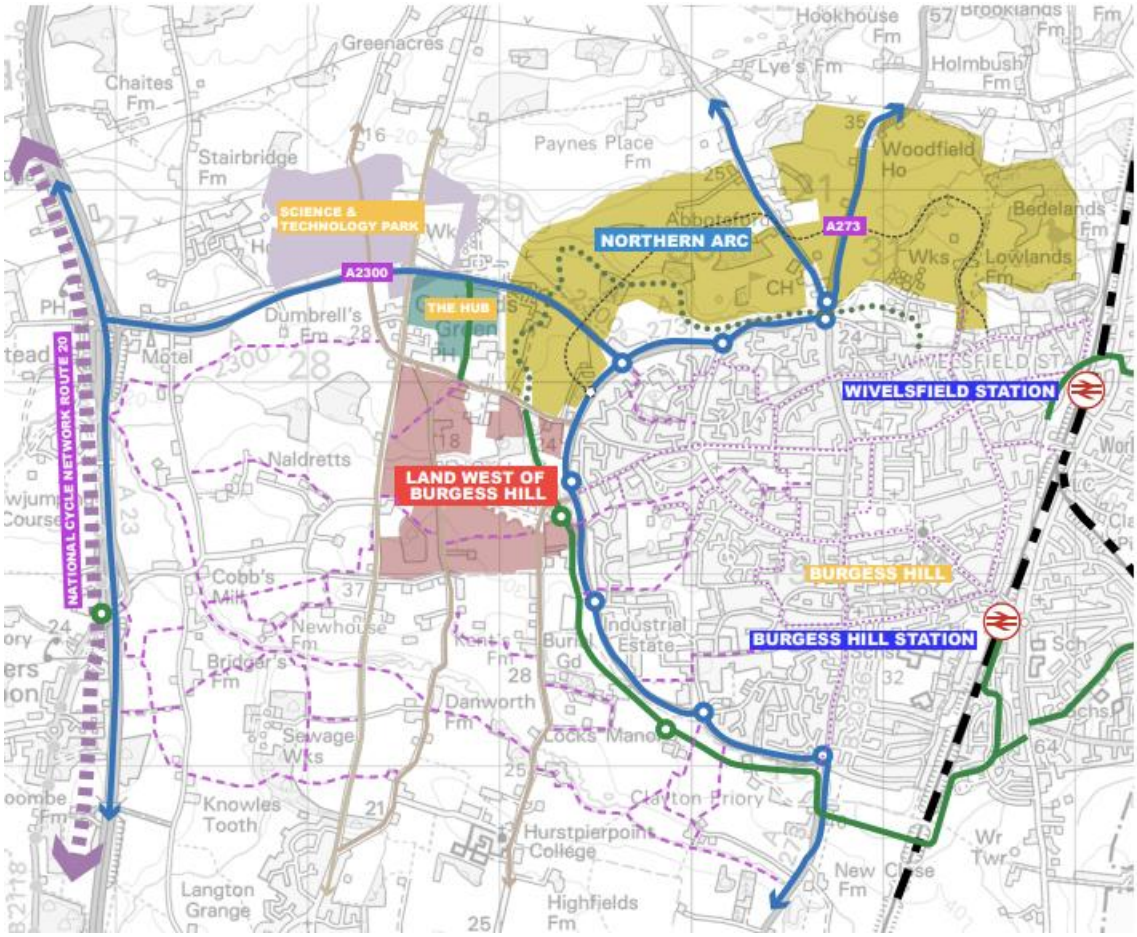
4.1 Land West of Burgess Hill (LWBH)

The LWBH development area would be a similar distance from town centre and railway station as Brookleigh.

The preliminary transport strategy for the LWBH site includes:

- Enhancement of existing and new pedestrian and cycle routes within Burgess Hill, including both railway stations, town centre, and Victoria Business Park, and connecting with the wider area
- Bus infrastructure improvements, including enhancement to bus services and bus stop infrastructure.

Figure 21. Transport framework (source: Thakeham, Vision Document, 2023)



[6] https://midsussex.inconsult.uk/gf2.ti/af/1531298/904612/PDF/-/LWoBH_Exec_Summary_v3.pdf

The supporting documentation for the LWBH emphasises walking and cycling to link the site to the station including a bike hire scheme[7]. Although an OmniTRANS Assignment Plot does appear to show some traffic demand to the town centre (the station diagram is too low resolution to make out the exact number), there is no assessment of what proportion of trips are parking or simply dropping off.

Given the similarities in distance and form to Brookleigh, we have applied the same factors to the LWBH proposal to estimate parking demand.

4.2 Sayers Common

It is more difficult to estimate the impact of the Sayers Common development proposal given its distance from Burgess Hill. The main source of information used is the Masterplan Framework Document[8] and the Sayers Common, Mobility Strategy, 2024[9]

Figure 21. Sayers Common illustrative masterplan (credit: futureofsayerscommon.co.uk, 2026)

The 'Local Movement' section of the Masterplan Framework highlights the 100 bus service which connects Brighton to Burgess Hill (and the station) and the 273 bus service which travels to Hurstpierpoint and runs close to Hassocks railway station. Although there are plans to increase frequency and number of daily services at present the 100 bus is only hourly, and the last service is around 19:00.

[7] https://www.midsussex.gov.uk/media/8700/22-10-14-w-of-bh-vision-document.pdf & https://www.midsussex.gov.uk/media/5i5nqcpu/vision-document-compressed.pdf

[8] https://futureofsayerscommon.co.uk/wp-content/uploads/2026/02/02494_Sayers-Common_-Masterplan-Framework-Document_RevK_small.pdf

[9] https://www.midsussex.gov.uk/media/omypmyeq/dpsc3-mobility-strategy.pdf

The 2024 Mobility Strategy is based upon a proposed 1,500 houses not the 2,500 currently being discussed. As a concept strategy, the document stays at a conceptual level and focuses on broad mode-share ambitions and the overall movement framework for the site. It does not yet progress to destination-based trip distribution or assignment. This includes identifying sustainable travel opportunities, and establishing the principles that will underpin later, more detailed work. As such, it outlines how residents might access Burgess Hill but stops short of quantifying the likely demand for those movements. The Mobility Strategy does not provide any quantified estimate of how many trips from the proposed development would be destined for Burgess Hill town centre or Burgess Hill railway station. Destination-specific trip estimates would normally be developed at the Transport Assessment stage, once the masterplan and network assumptions are more fully defined.

The transport assessment produced for LVS Sayers Common, 2023[10] includes a Travel Demand Model and Trip Generation, but only for a site of 250 houses. This suggests a modal split for journeys to work of 72% driving car/van, and 10.7% for rail although only 3.7% of trips are assigned to Greater London. The split between BUG and WVF stations is not estimated.

4.3 Impact of the additional options

In the absence of an alternative methodology or specific transport assessments for the two additional developments, we have apportioned demand based on the AECOM Brookleigh transport assessment. The limitations of this method should be noted.

5. Demand modelling

The nominal growth rates / factors (i.e. raw model output before constraints, sensitivity testing, or behavioural adjustment) applied to represent demand at 12:00 on a weekday are:

Figure 22. Additional demand estimates

Source	Parking Demand Category	Uplift/ratio
Network Rail	Rail cluster demand (commuting)	66
TEMPro	Rail cluster demand (commuting)	1.0585
Brookleigh	Rail cluster demand (commuting)	8
LWBH	Rail cluster demand (commuting)	4
SC	Rail cluster demand (commuting)	7
TEMPro	Town Centre demand (retail)	1.0585
Martlets Dev.	Town Centre demand (retail /leisure)	50
Brookleigh	Town Centre demand (retail)	175
LWBH	Town Centre demand (retail)	8
SC	Town Centre demand (retail)	44
Brookleigh	Town Centre demand (commuting)	57
LWBH	Town Centre demand (commuting)	25
SC	Town Centre demand (commuting)	47

5.1 Demand / Supply Scenarios

The demand and supply scenarios test how robust the parking system is under different, but plausible, combinations of growth and change. By using scenarios, the model provides a bounded range of outcomes and helps identify (i) which locations are most sensitive to growth, (ii) when/where capacity becomes a binding constraint, and (iii) the scale and timing of intervention needed to avoid unmanaged displacement and congestion.

[10] https://www.midsussex.gov.uk/media/hcxlzkbj/transport-strategy.pdf

5.1.1 Demand Scenarios

The demand scenarios (DS1–DS5) represent different combinations of (a) background growth (using TEMPro/NTEM factors), (b) committed and likely development impacts (Brookleigh and the Martlets redevelopment), (c) additional optional growth locations tested as a sensitivity (Land West of Burgess Hill and Sayers Common), and (d) seasonal uplift to reflect demand change during the year.

As discussed in section 2.3 seasonal demand is tested as a sensitivity to provide a bounded range and consider fluctuations throughout the year. DS1-4 are based on actual observed survey data from February with DS5 accounting for seasonal variation with June.

Figure 23. The demand scenarios (down), with what growth factors each includes (across)

Demand Scenarios	Background Growth	Brookleigh & Martlets	Land W of Burgess H. and Sayers Com.	Sensitivity Test: seasonal change
DS1	◆			
DS2	◆	◆		
DS3	◆	◆	◆	
DS4	◆	◆		◆
DS5	◆	◆	◆	◆

5.1.2 Supply Scenarios

The supply scenarios (SS1–SS2) translate the proposed changes to the number of available spaces within the two clusters by 2040.

SS1 is the baseline 'do nothing' supply position. SS2 represents a reduced-supply case that combines the removal of Queens Crescent (linked to the station-area regeneration proposals) and the net change associated with replacing the Martlets MSCP. Both changes can be included in a single scenario because the model outputs are considered by cluster (rail / town centre).

The parking numbers for the 'Changes to Martlets' are taken from a report to the MSDC Planning Committee variation of conditions for the Martlets Application (August, 2025)[11].

Figure 24. Supply scenarios (down) and which supply assumptions are included (across)

Supply Scenarios	Do nothing (1272)	Less Queens Cres. (-205)	Changes to Martlets (+4)
SS1	◆		
SS2		◆	◆

[11] https://midsussex.moderngov.co.uk/documents/s21744/dm.25.1327 the Marlets shopping centre V2.pdf

5.2 Model Methodology

1. The Baseline demand as observed at 12:00 weekday in the beat surveys is summed by cluster[12]
2. DS1, **do nothing** is baseline multiplied by the TEMPro growth rate to give background growth
3. DS2/3 are DS1 with the **additional estimated growth** as appropriate, set out in Figure
4. DS4/5 are DS2/3 factored by the **seasonal change** factor.

The limitations of this approach should be noted. Forecasting parking demand to 2040 necessarily involves uncertainty because several inputs cannot be known with precision that far ahead, including the timing and detailed mix of developments, the extent to which new trips will be captured by Burgess Hill town centre versus other destinations, future rail and retail travel behaviour (including the longer-term effects of flexible working), and the impact of policy and market changes such as public transport service levels, parking tariffs, fuel/energy costs and wider economic conditions.

In addition, the source evidence used (e.g. TEMPro/NTEM growth factors) provides a reasonable and transparent basis for modelling, but it cannot fully reflect local behavioural adaptation once supply becomes constrained (e.g. displaced parking, trip suppression, mode shift, or changes in time-of-day).

The model results should therefore be treated as indicative and produced to aid decision making, and the sensitivity tests are intended to bound the plausible range of outcomes rather than predict a single definitive demand figure.

The demand outputs are likely to be broadly conservative as they are intended to be justifiable, and evidence based using pre-existing approved documents and reports.

5.3 Demand Modelling Results

The planning horizon set to represent the 'after' state is 2040, specifically a weekday at 12:00. This specificity is because parking is affected by seasonal and demand differences through the day and days of the week and aims to test a typically high demand day.

DS1 shows background growth without additional development (i.e. TEMPro and Network Rail estimates). Against do nothing it shows the estate is likely to be able to deal comfortably with the additional demand. With a reduction of supply there are likely to be capacity issues in the station cluster.

DS2 shows background + developments already under construction or with a high degree of certainty of going ahead. Against do nothing, this shows that supply is adequate in the town centre but pressure within the station cluster which is exacerbated if supply is reduced.

DS3 shows background+ DS2 and additional estimated demand from Land West of Burgess Hill and Sayers common. Against do nothing, the town centre supply becomes more pressured but remains adequate. The station supply becomes pressured even under the do nothing and inadequate if the supply reduced.

DS3 is considered the most likely scenario because it is anchored to the strongest available evidence and combined with the committed and most plausible sources of growth against observed occupancy in February.

DS4/5 are seasonal sensitivity tests, designed to validate the model by demonstrating how results vary in response to changes in the key assumption (occupancy) due to seasonal effects. DS4 tests seasonal variation against DS2 and DS5 against DS3. For the purposes of planning parking provision, these are

[12] Chanctonbury Rd is excluded. This is because it would be inconsistent to apply growth to this single stretch of on-street parking and not to others in the nearby vicinity. As it is 100% full in the surveys it nets to zero in any case.

not considered the most appropriate demand scenario and DS3 is most plausible forecast of growth. The following table presents the outcomes of the modelling exercise.

Figure 25. Modelled surplus/deficit against supply and demand scenarios.

	Cluster	Supply	DS1 Demand	DS1 +/ -	DS2 Demand	DS2 +/ -	DS3 Demand	DS3 +/ -	DS4 Demand	DS4 +/ -	DS5 Demand	DS5 +/ -
SS1	Town Centre	932	403	529	685	247	825	107	809	123	973	-41
SS1	Station	340	263	77	342	-2	352	-12	308	32	317	23
SS1	Total	1272	666	606	1027	245	1177	95	1116	156	1290	-18
SS2	Town Centre	936	403	533	685	251	825	111	809	127	973	-37
SS2	Station	135	263	-128	342	-207	352	-217	308	-173	317	-182
SS2	Total	1071	666	405	1027	44	1177	-106	1116	-45	1290	-219

Methodolgy reminder:

1. *The Baseline demand as observed at 12:00 weekday in the beat surveys is summed by cluster*[13]
2. *DS1, **do nothing** is baseline multiplied by the TEMPro growth rate to give background growth*
3. *DS2/3 are DS1 with the **additional estimated growth** as appropriate, set out in Figure*
4. *DS4/5 are DS2/3 factored by the **seasonal change** factor.*

Explanatory Notes:

- Demand scenarios run across the columns and supply scenarios run down the rows.
- Results are divided into the town centre and station clusters, with a combined total shown beneath each supply scenario.
- The supply column shows the available parking spaces for each cluster under the relevant supply scenario.
- For each demand scenario, the first column shows modelled demand and the adjacent "+/-" column shows the resulting surplus or deficit against supply.
- Positive "+/-" values indicate spare capacity; negative values indicate a shortfall.

5.4 Demand Modelling Conclusions

The key conclusions are:

- The demand modelling indicates that, while total town-centre supply is broadly sufficient in the "do nothing" scenario, capacity becomes constrained once committed development demand and background growth are applied.
- Under DS3, if the reduced supply scenario (SS2) is progressed, the modelling indicates a station-cluster shortfall of ~200 spaces (with a much smaller town-centre shortfall emerging only in sensitivity scenarios).
- Taken together, the modelling supports a strategy that prioritises targeted interventions around the station cluster (to address the binding constraint) alongside measures to better utilise spare capacity in the town centre cluster and to manage peak / seasonal demand.

The results should be treated as conservative but uncertain: key inputs (e.g., town-centre capture rates for new retail trips, assumptions on commuter behaviour, and the reconstruction of Martlets uplift) are necessarily approximate, and real-world outcomes will depend on mode shift, pricing, and management interventions.

[13] Chanctonbury Rd is excluded. This is because it would be inconsistent to apply growth to this single stretch of on-street parking and not to others in the nearby vicinity. As it is 100% full in the surveys it nets to zero in any case.

6. Mitigation Options and Overall Conclusions

The assessment through to 2040 indicates that future parking challenges will result from a combination of rising demand and decreasing supply.

The study's brief requires an evaluation of high-level options to manage future parking demand, including whether safeguarding the parking supply around the station is necessary, alongside alternative measures such as reallocation of parking supply, policy adjustments, and pricing changes.

The operational planning target occupancy of 80% is a sensible objective to balance revenue and utility as 80% is the point when car parks are effectively 'full' when circulation, entering and exiting are accounted for. Given the long stay nature of station parking 90% is probably acceptable if the design reduces circulation and space searching. If parking is split across separated sites, these problems are made worse and could create congestion.

The options of both simply building more parking to meet projected demand and solely suppressing demand to fit existing supply are discounted, as a better approach is a strategy which considers a fuller set of options and interventions:

6.1 No reprovision / suppress demand to meet supply

There is no specific statutory duty on local authorities to provide parking at or near railway stations. Councils have powers to provide and manage off-street parking, "for the purpose of relieving or preventing congestion of traffic"[14]. However, removal of parking where it negative impacts are expected or known about may raise objections and challenges for future TRO implementation and objections. MSDC may wish to seek separate legal advice on this.

If formal station parking is removed commuter demand is unlikely to disappear; instead, a high proportion could displace to other stations in the area: Wivelsfield which has no formal parking or Hassocks which is already well utilised. Worse, some demand is likely to displace onto nearby streets and informal spaces, creating an overspill problem that will need to be managed.

In addition, scarce parking supply generates circulating traffic as drivers search for spaces, increasing vehicle movements around the station in the morning and evening peaks and adding to delay, congestion and conflict at junctions and on key approach routes.

A no re-provision approach can also be counterproductive for wider transport and climate objectives if a proportion of users respond by switching from rail back to driving the whole journey, increasing longer-distance vehicle miles and peak-hour congestion on the strategic network.

Finally, no re-provision can reduce station accessibility for users who cannot reasonably walk, cycle or use bus services for all journeys (including those travelling from lower-frequency corridors, shift workers and people with mobility constraints), while creating ongoing reputational and operational issues for the Council through complaints, reactive restriction requests and increased enforcement and administration costs.

6.2 Increase Demand to Meet Supply

The main case against retaining the parking at Queens Crescent is that this reduces the potential for redevelopment and housing supply in a sustainable location and fails to deliver the ambitions of the draft local plan.

[14] In particular, section 32 of the Road Traffic Regulation Act 1984

In terms of replacing the current parking provision with an MSCP, the case against comes down to unaffordability without subsidy given current tariffs compared with costs of construction (materials and labour) along with and modern standards requiring larger spaces and stronger structures[15].

6.3 Mitigation Strategies

Managing demand in a way that changes travel behaviour and allows those who can switch from single occupancy vehicle (SOV) to other modes is policy compliant and reduces parking demand. Options to consider include:

Firstly; Displacing demand into Town Centre car parks. This is problematic for two reasons: future demand at these sites may mean they are full; and the nature of rail commuting where car park users want to arrive as close to their train departure time as possible. This is partially offset by the high frequencies at Burgess Hill station where a specific infrequent service is rarer (broadly 30mins to Cambridge, Bedford and Littlehampton).

Figure 26. Walking distance to the station from key car parks

		Inclusive	Average	Fast	
Car Park	**Distance:**	**0.8 m/s**	**1.1 m/s**	**1.4m/s**	**Road Crossings:**
Cyprus Rd	530	10.6 min	8.0 min	6.4 min	Five
Market Place	490	9.8 min	7.4 min	5.9 min	Four
Queens Crec.	175	3.5 min	2.6 min	2.1 min	None
	Distance	mins	mins	mins	

As part of linked journeys with likely longer journey times, return walking times of between 20 and 12 minutes may be acceptable in conjunction with incentives such as affordable weekly tickets and improvements to the walking routes and signage between the car parks and the station such as better crossings and signage. In time and after monitoring of use, a business case for decking at either Cyprus Rd or Market Place may emerge. Discussion with the operator of Market Place will be needed.

Secondly; Travel Planning and Mode Shift. The Brookleigh plans include ambitious plans for bus routes and walking and cycling improvements. However, as discussed, this demand is better encouraged to use Wivelsfield with associated improvements to cycle parking provision.

Increased walking and cycling. Especially electric bikes: road.cc quotes a Norwegian study tracking users over six months which found that average daily cycling distance increased from 2.1 km to 9.2 km. That is still beyond the range of LWBH and Sayers Common.

6.4 Conclusions

Given the uncertainties in demand modelling and the impact of events far outside the control of MSDC e.g. macroeconomics, Covid-like events, and energy crises, the model does not replace decision making by the elected members of the Council and their officers.

In summary;

1. Demand for both town-centre parking and rail-station parking is forecast to increase, driven by committed development (including Brookleigh and the Martlets) and background growth, with the station cluster becoming the key constraint in the higher growth / seasonal scenarios.
2. Previous evidence (including the 2024 PML Report) indicates that there is underlying demand for station parking. The primary barrier to delivery of a replacement multi-storey car park was

[15] See the Institute for Structural Engineers Car Park Design 2021

not demand, but viability/affordability without an external subsidy given current construction costs and likely tariff revenue.

3. While a mitigation strategy including travel planning, pricing, management and better utilisation of town-centre supply, is important and should be progressed, it is unlikely on its own to fully offset the requirement for dedicated station parking provision. Without an appropriate level of formal supply, there is a high risk of displacement to residential streets and additional circulating traffic around the station.
4. Under the most likely DS3/SS2 scenario the modelled shortfall is approximately -106 spaces across the whole town centre, largely attributable to the station cluster.
5. Considering the station cluster in isolation, the modelled shortfall is approximately -217, under DS3, if the reduced supply scenario (SS2) is progressed.

The overall recommendation is a balanced approach: maximise the performance of existing town-centre assets and demand management measures, while safeguarding and planning for an appropriate level of station parking provision to avoid unmanaged displacement effects, keeping the supply and demand situation under review as things change by carrying out occupancy surveys on an annual basis with additional surveys.

A critical part of this will be regular (quality) monitoring of occupancy. This does not need to be an expensive contract; simple beat surveys every quarter will start to build a picture of true occupancy as time goes on.

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