Arun District Car Park Study

Stage 1 Report - The Base Case

October 2024

Contents

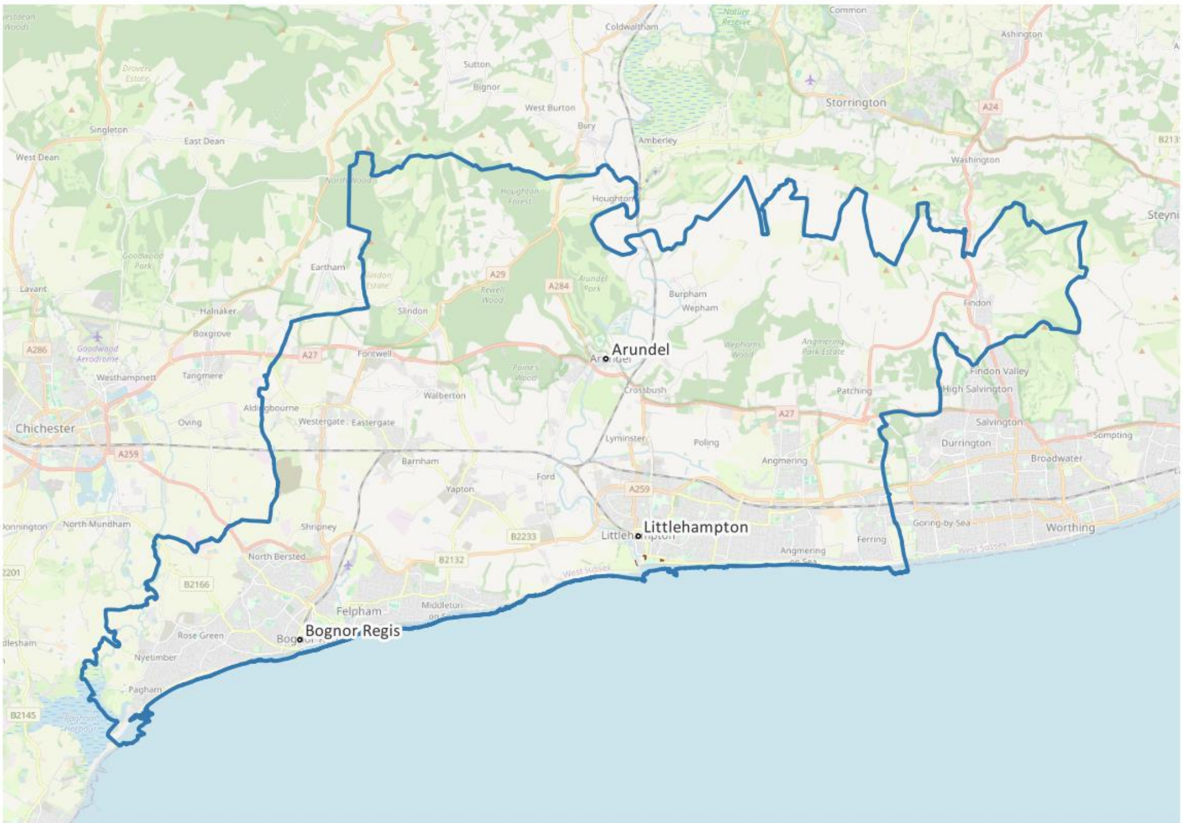
1. Arun District

This report summarises the technical work undertaken to establish the 'Base Case' for a parking study commission by Arun District Council (ADC) to as part of Parking Matters Ltd's (PML). The Base Case considers the district character and policies, the towns' characteristics, outlines occupancy and site surveys, and benchmarks tariffs.

1.1 Understanding the District

There are three towns in scope with off-street parking facilities operated by ADC; Arundel, Bognor Regis and Littlehampton.

Figure 1. Overview map of the district



1.2 Population Statistics

Arun is classified as largely 'Predominantly Urban' (LU) in the Office of National Statistics (ONS) Urban / Rural classification alongside Adur and Worthing. Chichester is classified as 'Predominantly Rural'.

According to the 2021 Census, the population of Arun is approximately 164,800. Based on Super Output Areas (SAOs); 93% of the population live in 'urban' areas according to the Office of National Statistics (ONS) classification. The rural / urban mix will have an impact on demand and type of demand for parking.

Figure 2. Urban / Rural population split

Name	**Arun**	
Region	**South East England**	
District Code	**45UC**	
Total Urban Population (excluding Large Market Town population)	73,673	52%
Large Market Town Population	130,649	93%
Rural Town Population (including Large Market Town population)[2]	3,467	2%
Village Population	3,467	2%
Dispersed Population	4,641	3%
Total Rural Population (including Large Market Town population)	2,084	1%
Rural% (including Large Market Town population)	10192.00	7%
Classification	LU	

Deprivation and House Prices

Arun ranks 149th of 317 areas on the Index of Multiple Deprivation (IMD), placing it in the middle of local authorities in England. However, there are areas of deprivation in Bognor Regis and Littlehampton within the most deprived decile[1].

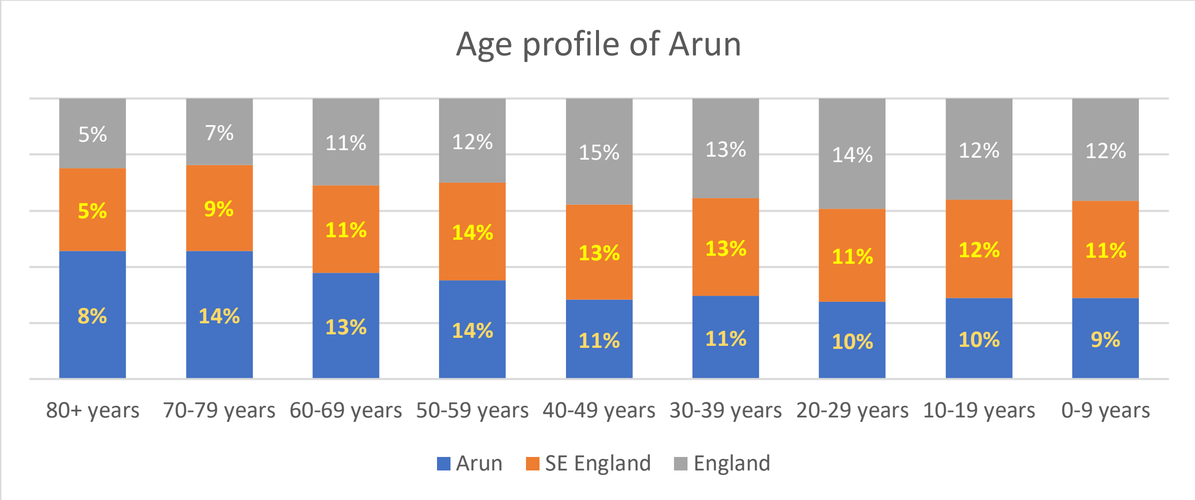
The average house price in Arun was £480,000 in 2021, 230th of 331 areas, so within the top quarter. In common with the rest of the county, house prices have risen sharply in recent decades.

Age profile and demographics

Arun district has a notable proportion of older residents. The aged 65 and over proportion has increased over the past decade. This demographic trend indicates an ageing population in the district.

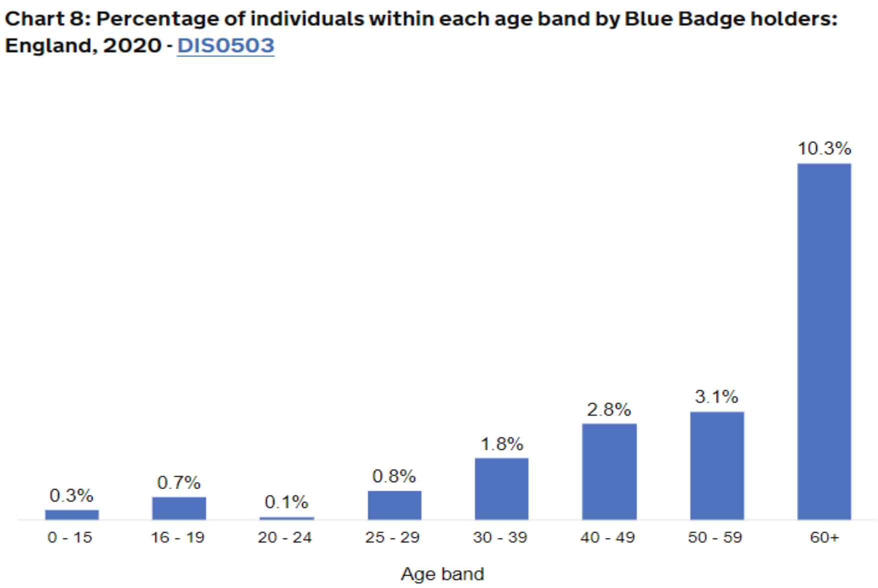
[1] For more detailed information see: https://democracy.arun.gov.uk/documents/s2701/Item%2014%20-%20Appendix%201.pdf

Figure 3. Age profile of Arun compared to the South East and England



The implications of an older population on transport and parking are multifaceted. Older residents may have different mobility needs, such as requiring more accessible public transport, increased demand for services like community transport, and parking spaces closer to amenities. Additionally, the presence of an older population can lead to a higher need for parking spaces designated for disabled individuals. The increase in blue badges may also call into question the sustainability of the current policy of free parking for blue badge holders.

Figure 4. Blue Badge holders by age group (DfT 2021)



1.3 Transport and Travel to work Data

Travel to work data provides context for the commuting and vehicle usage habits of residents. The 2021 Census was heavily impacted by the Covid19 pandemic which saw a sudden spike in working from home due to movement restrictions. As a result, work from home rates are much higher than in the previous Census. Unofficial data shows the number of people still working from home at least one day in the last week has reduced from a peak of 46% in March 2020, and is now reasonably stable at 30% 'hybrid working'[2].

Figure 5. Travel to Work, mode of Travel, 2021 Census, ONS

	Home	Under-ground	Train	Bus	Taxi	Cycle	Car Driver	Car Passenger	Bicycle	On foot	Other
Arun	24.7%	0.1%	1.7%	1.7%	0.3%	0.5%	54.6%	5.2%	2.8%	7.3%	1.1%
South East England	35.8%	0.2%	2.2%	2.5%	0.5%	0.5%	44.2%	3.5%	1.9%	7.6%	1.0%
England & Wales	31.2%	1.8%	1.9%	4.2%	0.7%	0.5%	45.1%	3.9%	2.0%	7.6%	1.0%

Arun has higher rates of travel to work by car driver and passenger than South East England or England and Wales. However, Travel to Work data suggests more outbound than inbound commuting (notably to Chichester and Horsham)[3]. This might suggest lower levels of commuter parking.

Home working impacts on parking patterns through higher pressure on residential roads and a significant reduction in commuter parking at railway stations and in city centres.

Access to Car and Vans

There are average levels of vehicle access for households in Arun reported in the 2021 Census when compared to the rest of the South East.

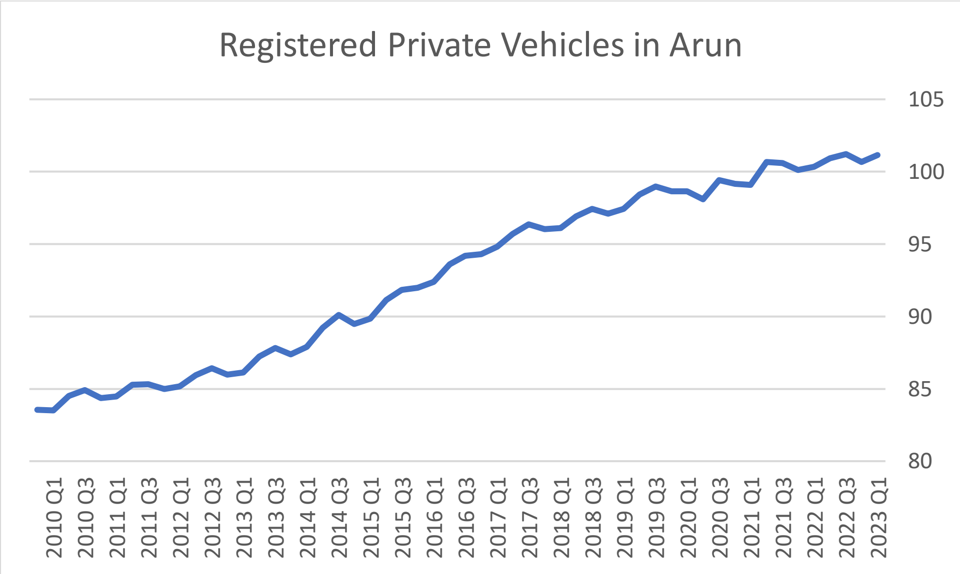
Figure 6. Access to Car and Vans, 2021 Census, ONS

Area	None	1	2	3 or more
Arun	16%	42%	29%	11%
South East England	17%	42%	30%	12%
England and Wales	23%	41%	26%	9%

Driver and Vehicle Licensing Agency (DVLA) data shows a steady increase in the number of cars registered in the districts but with a slowing down of the increase in recent years.

[2] https://www.statista.com/statistics/1207746/coronavirus-working-location-trends-britain/
[3] https://commute.datashine.org.uk/

Figure 7. Registered Private Vehicles, DVLA, 2023



The district is reliant on cars as the main mode of travel, with only 3.4% of commuting by bus or train. Private vehicle registrations continue to increase, albeit the rate of growth has slowed in recent years.

1.4 Retail Market Conditions

From a parking market perspective, it is important to consider the characteristics of the towns individually rather than just treat the district as one place.

A useful metric for the market condition is the Harper Dennis Hobbs Retail Vitality Index (RVI). The RVI lists the top 999 UK retail centres by 'vitality'. What this represents is an attempt to score the retail offer on quality and vitality rather than simply by size. In practice this means independent boutiques, cafés or major department stores boost the vitality rank, whilst bookmakers and takeaways reduce it. The RVI cannot be scientific and is open to individual interpretation but is a useful tool to broadly consider whether tariffs broadly reflect the retail offer in a town.

Figure 8. RVI 2022, with Greater London, suburban and out-of-town retail excluded.

Retail Centre	Region	HDH Centre Type	2022 Vitality Score	2022 Rank	2021 Rank	2019 Rank
Berwick-upon-Tweed	North East	Town - Small	680	958	976	858
St Austell	South West	Town - Medium	680	959	974	608
Aberdare	Wales	Town - Small	680	960	975	920
Haverhill	East of England	Town - Small	680	961	964	908
Paignton	South West	Town - Medium	679	964	970	614
Wisbech	East of England	Town - Medium	679	967	926	488
Littlehampton	South East	Town - Small	677	971	949	905
Fakenham	East of England	Town - Small	675	974	919	695
Barry	Wales	Town - Small	675	975	985	691
Colwyn Bay	Wales	Town - Small	675	976	987	681
Alton	South East	Town - Small	674	978	973	652
Margate	South East	Town - Medium	674	980	981	677
Weymouth	South West	Town - Medium	672	981	966	616
Portsmouth City Centre	South East	City Centre	703	771	601	386
Potters Bar	East of England	Town - Small	703	774	813	363
Coatbridge	Scotland	Town - Small	703	776	733	928
Hamilton	Scotland	Town - Medium	703	777	774	800
Scunthorpe	Yorkshire	Town - Medium	703	778	749	767
Evesham	West Midlands	Town - Medium	703	779	719	953
Bognor Regis	South East	Town - Medium	703	780	746	672
Preston City Centre	North West	Town - Large	703	781	442	491
Ashbourne	East Midlands	Town - Small	703	782	656	522
Bridlington	Yorkshire	Town - Medium	703	783	748	762
Redditch	West Midlands	Town - Medium	703	784	818	427
Stoke-on-Trent City Centr	West Midlands	City Centre	703	786	654	429
Helston	South West	Town - Small	703	787	836	519

Arundel

Arundel is not in the RVI. The smallest of the three in-scope towns, it is a small market town in the north of the district. Arundel is well conserved and includes medieval buildings including a castle and grounds as well as specialist retail, a lido and museum. As of the 2021 Census, Arundel has a population of approximately 34,751. The median age in the area is 44.7 years.

Only one off-street site, Crown Yard, is owned by ADC (although there is a very small additional site to the south of this). ADC assist with management and enforcement of the lido car park.

Parking demand is high, especially at times of peak tourism demand.

Bognor Regis and Littlehampton

Bognor Regis and Littlehampton are both seaside towns populations of 68,435 and 27,795 respectively. The median age for Bognor Regis is 48.9 years which indicates an older population compared to the national average and compares to an average of 44.7 years in Littlehampton, which is more in line with the national average.

The RVI ranks Littlehampton at 677 of 999 l alongside other centres such as Fakenham, Margate and Weymouth. Bognor is ranked lower, at 703, alongside centres such as Evesham, Bridlington and Helston.

Both towns have a decent retail offer and some employment including in advanced manufacturing. Arun is second only to the greater Brighton area in the size of its tourist sector, within the Coast to Capital Local Economic Partnership Area[4]. Overall, the largest parking demand sectors are likely to come from retail and tourism, with some commuting.

1.5 Summary

Although categorised as 'mainly urban' by the ONS, large parts of Arun district are rural. Despite reasonably good rail connections limited local public transport options result in higher travel to work by car and car ownership than other places in England, although in line with the South East average. This will create increasing pressure on both on and off-street parking.

The district might have to consider adapting parking policies to accommodate the changing nature of work and population structure. A slightly older demographic could put pressure on blue badge bays and call into question the sustainability of free parking for blue badge holders.

Bognor and Littlehampton retail centres are typical of small/medium sized towns and, as the RVI suggests, doing reasonably well within a difficult retail environment nationally. The emphasis of measures should be on supporting vitality and encouraging churn of custom and space availability.

Continuously monitoring relevant metrics through payment terminals or monitoring equipment, would help policymakers make informed decisions about parking policies, this will be difficult given the high levels of disc parking (see subsequent sections).

Any strategy will need to balance the requirement for many to travel by car, given the nature of the district and the low density of bus services, with an objective to reduce traffic and promote alternatives to use of single occupancy vehicle alternatives.

[4] https://democracy.arun.gov.uk/documents/s2701/Item%2014%20-%20Appendix%201.pdf pg.17

2. Local Policy and Strategy

There are a number of important policy documents which should be considered with regards to planning and transport policy, as well as a high-level Parking Strategy adopted in 2021.

2.1 The West Sussex Transport Plan (WSTP) 2021 - 2036

The WSTP recognises the changing world of transport technology and the implications that this may have for parking including connected vehicles and self-parking. The table below includes relevant references to off-street car parking from the WSTP and the implications for Arun's parking strategy. We have omitted information to on-street parking where it has little relevance to the off-street estate for brevity.

Figure 9. Summary of key relevant parking points in the WSTP

County Transport Plan	Implications for Parking Strategy
Arun: Use on-street parking and traffic management techniques in Bognor Regis, Littlehampton, Arundel and Barnham to manage demand.	Consider management of parking through tariffs and regimes.
Highways Technology: Consider highways technology to improve customer information	Consider implications of regimes for those with reduced mobility.
Equestrianism: Facilitate the provision of parking opportunities for horse trailer boxes.	Retain/improve trailer and longer vehicle parking.
Future Mobility: facilitate the move away from internal combustion engine vehicles; "need to be flexible to adapt to changes in consumer behaviour (including other technologies, such as hydrogen, if they emerge)".	Flexibility in approach and moderation in supporting one solution (e.g. Electric Vehicles) over other options.
Future Mobility: Preparing for connected and autonomous vehicles.	Make sure that information about parking is up-to-date and available by third parties.

2.2 The Local Plan

The Arun Local Plan 2011-2031 was adopted by resolution of Full Council on 18 July 2018 and replaced the previous Local Plan from 2003. The Local Plan considers parking in a number of sections as it relates to Planning Policy:

Figure 10. Summary of the key relevant parking points in the Local Plan

Local Plan	Implications for the parking study
Arun: Use on-street parking and traffic management techniques in Bognor Regis, Littlehampton, Arundel and Barnham to manage demand.	Consider management of parking through tariffs and regimes.
Revitalising Town Centres: Measures are needed to improve the physical environment and improve traffic congestion and parking to make town centres more attractive as destinations	How the parking estate can contribute to making the town centres more attractive as destinations.
Littlehampton Economic Growth Area: development should maintain appropriate levels of town centre parking.	The study should consider the contribution that car parks make to Littlehampton.
Parking (15.4.1): Town centre car parks are important for the economy of the district and for ensuring that visitors can access businesses and attractions.	The study should consider the value of town centre parking and individual car parks to supporting the town centres.
Parking (15.4.1): The provision of car parks must be of a high quality, conveniently placed, safe and secure and provide sufficient capacity to meet demand.	The study should consider the quality and design of car parks.
Policy TDM2 Public Parking: Where the loss of town centre car parking is proposed, the impact upon parking provision must be fully assessed and provision must be made to meet the anticipated demand.	The study should consider and highlight the importance of the parking estate to assist the council in making decisions around regeneration.

2.3 Arun Parking Standards Supplementary Planning Document (SPD)

The Arun District Council Parking Standards Supplementary Planning Document (SPD) outlines the minimum and maximum parking standards for different types of developments, including residential, commercial, and industrial. It emphasises the need for adequate parking provision to avoid congestion and balance the need for parking with the promotion of sustainable transport options.

The SPD is rightly focused on the planning system but some implications for this study are the encouragement of sustainable transport options such as cycling and public transport, guidance on the design and layout of parking areas to ensure they are safe, accessible, and visually appealing, including recommendations for landscaping, lighting, and signage.

2.4 Arun Off-street Parking Strategy 2021-2026

The Arun Off Street Parking Strategy (the Parking Strategy) starts with a vision to:

"… provide safe, well-maintained car parks that meet the needs of residents, shoppers and visitors to Arun, providing support for economic growth, [and] promoting a sustainable environment."

The strategy recognises that:

"People want to be able to find a space when they need it, where they want it, and at a reasonable price that relates to their destination. Customers expect to pay for parking in a town centre because these places offer a variety of shopping, cultural and leisure experiences and they generally know that demand needs to be managed, and car parks need to be maintained."

The strategy notes that where there is a surplus in parking revenue, Section 55 of the Road Traffic Regulation Act 1984 sets out a number of areas which can be funded by the car parking account. These areas include transport, highway or road improvements; environmental improvements (including reduction of pollution and improvement or maintenance of amenity); and provision of outdoor recreational facilities available to the public without charge. Therefore, parking revenue raised from off-street parking could be an important way of helping to achieve the objectives of wider development and regeneration strategies.

The findings, objectives and measures in the off-street Parking Strategy remain valid. This study will sit beneath it and provide recommendations for how to deliver the vision and objectives.

2.5 Summary.

In summary, the existing policies of the Highways Authority (West Sussex County Council) and the district are to seek to create a balance between supporting town centres and helping residents access services by using technology and data to improve the customer experience. Actions should reduce the impact of parking and traffic on communities and the environment through a policy of managing parking through tariffs, whilst supporting efforts to encourage more sustainable transport modes.

This study sits below the 2021 Parking Strategy and will seek to deliver its objectives.

3. Occupancy surveys and income

In this section we consider the car park usage profile, disc parking and financial information in order to provide recommendations for the management of the off-street parking estate.

2.6 Occupancy Surveys Methodology

Survey data was collected over three days in mid-July 2024. This was initially planned to be in the form of three 'beat' surveys across a morning, midday and afternoon in each town. Surveys would begin and end in a different town on each day.

The weather on the 22nd of July was very poor with the forecast suggesting better weather on subsequent days. As weather has a huge impact on coastal towns and places with visitor attractions and as the 'peak' demand is the critical metric when planning for car park capacity, the methodology was revised to collect the 'peak' across the three days. We know from our work in other places this is nearly always between 10:00 and 15:00. (This approach would also give a sample of disc counts throughout the day sufficient to enable further analysis).

Data was collected for a 'rainy', 'cloudy' and 'sunny' count, with all three days in the summer school holidays. Day 1 began in Bongor Regis, day 2 in Littlehampton, and day 3 in Bognor Regis.

Disc parking was counted manually by looking in windscreens, a rate of 4% could be added to include online 'virtual discs'.

Figure 11. Occupancy survey data as collected

Name	Town	Type	Capacity	est	Mon (Rain)	Tue (Cloud)	Wed (Sun)	Mon (Rain)	Tue (Cloud)	Wed (Sun)
Hotham Park	Bognor	Seasonal	47		37	30	31	79%	64%	66%
West Park	Bognor	Seasonal	28		17	24	14	61%	86%	50%
Gloucester Road	Bognor	Seasonal	119		29	49	29	24%	41%	24%
Rock Gardens	Bognor	Seasonal	13		2	3	1	15%	23%	8%
Culver Road	Bognor	Seasonal	47		6	4	6	13%	9%	13%
West Beach	Littlehampton	Seasonal	72	*	13	19	32	18%	26%	44%
West Green	Littlehampton	Seasonal	331	*	58	119	188	18%	36%	57%
East Green	Littlehampton	Seasonal	209	*	45	27	65	22%	13%	31%
Banjo Road	Littlehampton	Seasonal	40		4	7	17	10%	18%	43%
The Wall	Littlehampton	Seasonal	44		8	7	9	18%	16%	20%
Sea Road	Littlehampton	Seasonal	48		14	14	28	29%	29%	58%
Mewsbrook	Littlehampton	Seasonal	126		83	66	119	66%	52%	94%
Hothamton	Bognor	Town	201		188	192	176	94%	96%	88%
London Road	Bognor	Town	98		22	34	34	22%	35%	35%
Lyon Street	Bognor	Town	61		54	53	61	89%	87%	100%
Fitzleet	Bognor	Town	343		109	88	76	32%	26%	22%
Regis Centre	Bognor	Town	175		92	112	86	53%	64%	49%
Anchor Springs	Littlehampton	Town	27		27	13	20	100%	48%	74%
Manor House	Littlehampton	Town	104		104	71	104	100%	68%	100%
River Road	Littlehampton	Town	19		17	11	9	89%	58%	47%
Surrey Street	Littlehampton	Town	43		32	27	26	74%	63%	60%
St Martins	Littlehampton	Town	235	*	102	147	127	43%	63%	54%
Crown Yard	Arundel	Town	64		64	32	32	100%	50%	50%
London Road Lorry	Bognor	Town	28	*	2	1	3	7%	4%	11%

Note on occupancy: The capacities given for West Green, East Green and West Beach did not include the unmarked overflow parking adjacent. St Martins in Littlehampton also has a higher capacity than stated due to closures for building works etc. We have estimated capacity using a Geographical Information System and satellite imagery as shown in Figure 11.

3.1 Survey Findings

The impact of the weather can be seen in Figure 11 with occupancy much higher in the seasonal car parks closer to the beach and attractions on the third, sunny day.

Town centre occupancy is largely unchanged by the weather which is as we would expect from survey work undertaken elsewhere. The order which the surveys were carried is noticeable, for example Mewsbrook which was either at the beginning or end of the beat depending on the day, is higher in the afternoon (Mon/Wed) than the morning (Tue).

The overall conclusions are that the town centre car parks are very busy with high occupancy in the peak. Spot checks in the evening suggested that they are quiet from about 18:00 onwards, as we see elsewhere in small/medium sized towns.

The seasonal car parks were busier in the better weather and, based on work in other coastal towns, we would expect some of or all of the seafront car parks to be full on certain high demand days (e.g. sunny summer bank holiday weekends), and almost empty on days in the low season (e.g. wet weekdays in October).

These findings will be expanded in further sections of the study when we consider future demand.

3.2 Parking Discs

Cardboard discs displayed were recorded as part of the beat surveys in all of the car parks where they apply.

Figure 12. Disc parking

Name	Town	Type	Capacity	est	Disc (Mon)	Disc (Tue)	Disc (Wed)	Mon (Rain)	Tue (Cloud)	Wed (Sun)	Disc (Mon)	Disc (Tue)	Disc (Wed)
Hothamton	Bognor	Town	201		91	91	70	94%	96%	88%	48%	47%	40%
Lyon Street	Bognor	Town	61		34	34	43	89%	87%	100%	63%	64%	70%
Fitzleet	Bognor	Town	343		23	22	19	32%	26%	22%	21%	25%	25%
Anchor Springs	Littlehampton	Town	27		12	6	10	100%	48%	74%	44%	46%	50%
Manor House	Littlehampton	Town	104		11	4	2	100%	68%	100%	11%	6%	2%
St Martins	Littlehampton	Town	235	*	38	68	60	43%	63%	54%	37%	46%	47%

Use of discs was as high as 50% in Anchor Springs and as low as 2% in Manor House car parks in Littlehampton; and as high as 70% in Lyon St and as low as 25% in Fitzleet MSCP in Bognor Regis. Discs are a convenience, and it follows that their use will be higher in the most convenient car parks such as Lyon St and Anchor Springs. The low use of discs in Manor House is likely to be as a result of a high number of ADC staff permits in this car park given that the income per space is so low.

We will consider the potential financial impact of the disc parking scheme in later stages.

It is difficult and inefficient to enforce restrictions on the use of cardboard discs e.g. extending a stay beyond 2 hours by altering the time on the disc, multiple uses on one day.

Perhaps more importantly, disc parking could be limiting town centre stays to under two hours. Town and retail centres typically aim for a customer dwell time of around 2-3 hours. This duration is considered optimal as it allows customers enough time to explore, shop, dine, and engage with various activities, leading to increased spending and a better overall experience[5]. Encouraging short stays through a disc scheme could be reducing stay lengths in the town centres, although there is the option to ‘top up’ for stays longer than 2 hours via phone app or returning to the P&D machine.

The price of the of the disc given its value may require review, nearby Horsham charges £20 for example.

3.3 Income by car park and season

Income per space is a basic but useful metric which gives a general overview of the popularity of car parks and their ‘value’ to the towns they serve.

Figure 13. Income in £.pp per space by month in 23/24

Name	Town	No.	23-24 April	23-24 May	23-24 June	23-24 July	23-24 August	23-24 September	23-24 October	23-24 November	23-24 December	23-24 January	23-24 February	23-24 March
Hotham Park	Bognor	47	220.32	219.41	212.03	220.60	322.95	196.15	166.70	67.08	128.61	92.43	94.84	82.49
West Park	Bognor	28	2.25	4.75	12.00	8.25	12.75	10.25	1.75	0.43	1.29	2.15	1.43	2.75
Gloucester Road	Bognor	119	171.20	131.07	105.19	227.36	379.51	101.32	109.81	14.09	43.24	20.14	50.70	69.10
Rock Gardens	Bognor	13	35.85	41.33	48.53	38.17	75.69	62.39	32.85	14.54	19.57	18.37	24.48	37.19
Culver Road	Bognor	47	35.87	48.33	63.09	37.88	77.97	59.70	23.72	4.10	4.05	6.73	6.76	18.96
West Beach	Littlehampton	72	199.17	347.23	560.83	268.26	568.89	503.66	154.86	51.69	61.96	88.55	83.72	196.29
West Green	Littlehampton	331	213.48	270.07	300.56	227.59	407.62	195.94	72.30	15.63	20.04	29.16	38.27	81.05
East Green	Littlehampton	209	284.01	389.49	580.28	263.88	746.34	428.81	120.46	36.84	49.79	63.31	67.22	161.92
Banjo Road	Littlehampton	40	43.60	77.91	111.61	117.26	159.90	92.41	42.53	14.31	15.82	21.78	24.41	50.02
The Wall	Littlehampton	44	35.89	59.29	84.59	40.14	95.88	71.91	40.01	8.88	12.39	13.93	11.38	26.97
Sea Road	Littlehampton	48	113.64	143.57	184.26	133.06	198.14	173.41	83.03	30.97	38.17	46.28	46.00	91.04
Mewsbrook	Littlehampton	126	52.28	64.04	81.38	57.18	88.98	80.96	44.31	22.96	22.81	32.23	33.03	44.90
Hothamton	Bognor	201	77.19	77.05	71.07	86.55	97.53	73.01	81.37	61.53	69.61	73.94	74.09	78.24
London Road	Bognor	98	70.81	96.03	96.74	90.65	117.83	87.23	56.14	44.86	104.10	59.63	59.41	67.45
Lyon Street	Bognor	61	40.32	45.96	42.03	44.12	49.79	39.55	40.05	39.17	35.41	43.55	37.93	44.89
Fitzleet	Bognor	343	12.61	13.23	11.86	12.97	14.10	11.32	10.47	9.95	11.25	11.73	11.05	10.43
Regis Centre	Bognor	175	150.16	153.82	144.44	144.04	168.85	141.43	113.32	98.91	105.01	92.44	98.85	118.46
Anchor Springs	Littlehampton	27	30.33	30.59	33.33	31.71	34.90	33.03	25.92	21.85	24.73	28.72	27.46	30.33
Manor House	Littlehampton	104	13.47	16.05	16.87	15.16	18.39	18.12	12.89	12.07	11.56	12.15	13.37	15.91
River Road	Littlehampton	19	113.95	123.81	123.61	129.18	135.50	109.65	98.60	80.12	82.35	90.07	79.71	95.62
Surrey Street	Littlehampton	43	84.24	92.40	112.70	98.29	119.33	102.02	81.88	65.63	72.07	84.33	78.75	90.46
St Martins	Littlehampton	235	39.59	42.21	46.32	44.16	53.13	45.50	39.10	35.43	36.93	41.08	39.31	48.34
Crown Yard	Arundel	64	234.18	221.32	216.07	248.45	259.50	215.44	224.47	192.99	207.09	177.28	187.10	201.17

The table above shows clear seasonality across the year in seasonal car parks, with a flatter income profile for the town centre car parks.

Financial comparisons with car parks in other places are very difficult given variations in tariffs and regimes. However, we have considered other data that we have for similar car parks in the same county. These sites share similar size and occupancy levels and are in the same sorts of locations in similar small/medium sized towns.

Figure 14. Comparison to nearby towns for which we have data

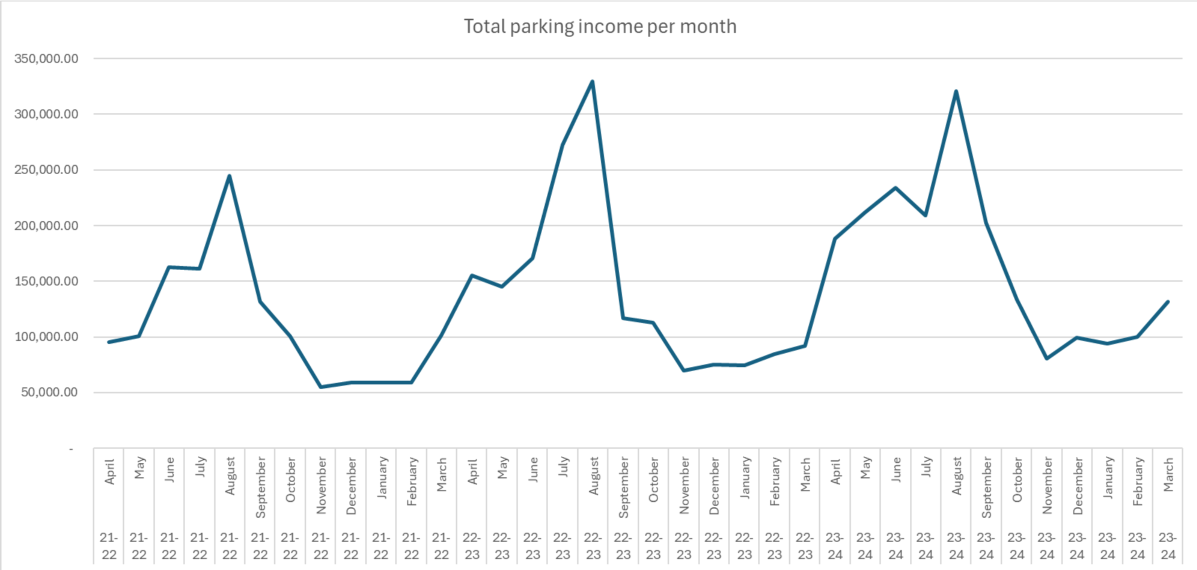
Arun	£/sp pa.	Car park with broadly similar characteristic	£/sp pa.
Hothamton	£928	Town centre car park of a similar size in a small town with a similar level of peak occupancy.	£1,661
St Martins	£511		£1,793
Crown Yard	£2,585	Smaller, very busy car park in historic town centre	£2,028

Hothamton and St Martins do not perform as well financially as we might expect when compared to similar car parks across the south of England that we have seen. This comparison is made worse as the tariffs in the comparison car parks are lower. The obvious explanation for this is the disc concession.

When total income is plotted over time it results in the graph below showing clear spikes in the summer months (graph excludes London Rd Lorry Park).

[5] https://www.placeexperts.co.uk/blog/how-to-increase-dwell-time-and-spend-in-your-town-centre-market-place, Savills UK | Consumer insights and others.

Figure 15. Income over three years by month



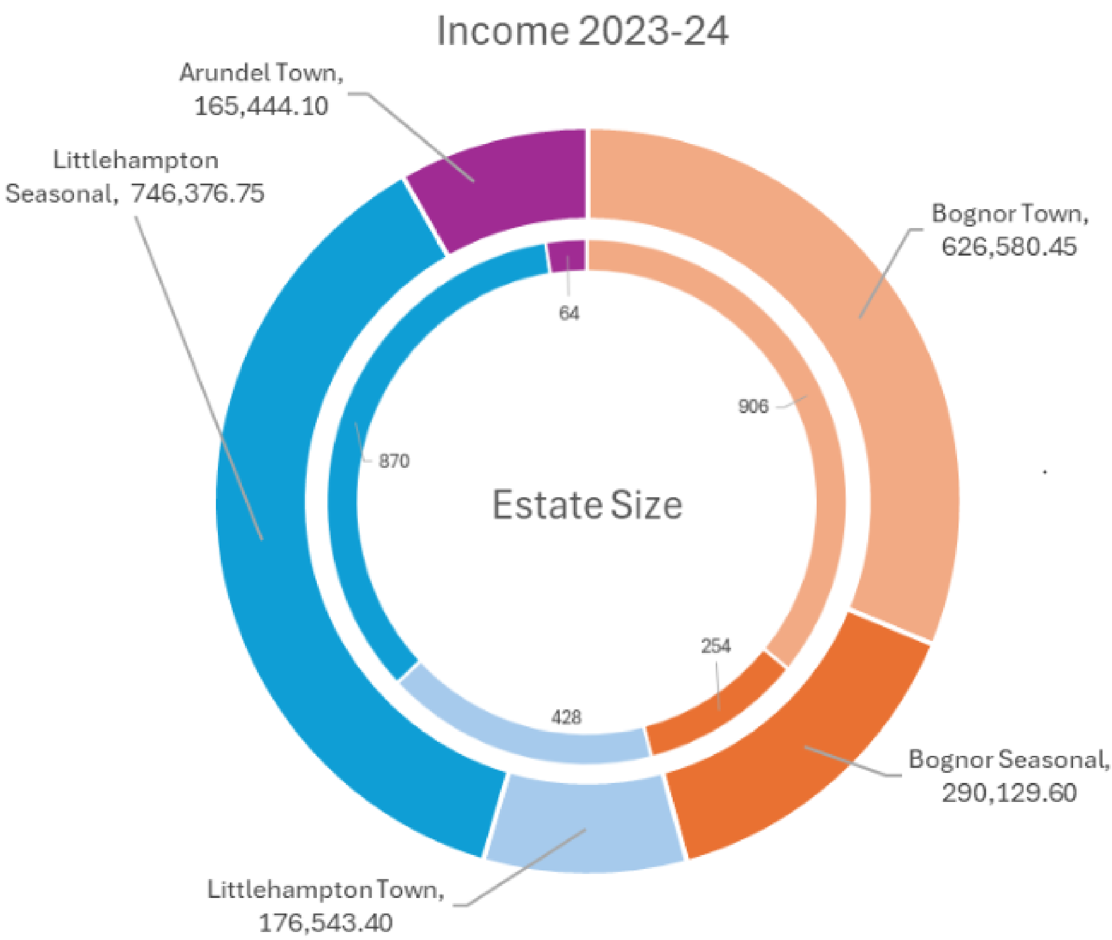
The seasonality of income is somewhat predictable for coastal resorts, but even considering this, is severe. It is likely to be exacerbated by:

- the poor financial performance of Town Centre car parks resulting from the disc scheme;
- the allowance of a number of concessions at busy times where the car parks would otherwise be very busy; this includes free parking on some days in December, traditionally the peak retail month where parking revenues would be highest, including Christmas light switch-on ceremonies, which otherwise could be expected to be busy.

3.4 Summary

The wheel below illustrates the comparison between the size of the estate (number of spaces) and income. Arundel over-performs significantly, Littlehampton and Bognor Town Centre sites both underperform and are made up by seasonal income. Bognor's income matches its 'number of spaces despite low occupancy in Fitzleet.

Figure 16. Comparison between estate size and income



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4. Tariff Benchmarking

Tariffs are the main way that demand for the finite resource of parking is managed, and a key way of influencing driver behaviour, for example, to encourage churn and turnover in visitors to support accessibility to town centres.

How tariffs are set depends very much on the objectives of the operator. A retail park or shopping centre is likely to set tariffs to encourage medium 3 or so hour dwell times, but discourage the ‘wrong’ sort of parking, e.g. commuters, either through maximum stay limits or through pricing. A private operator is likely to set tariffs simply to maximise income. Local Authorities have a much more difficult job and have to balance a whole range of policy objectives, as well as political influences.

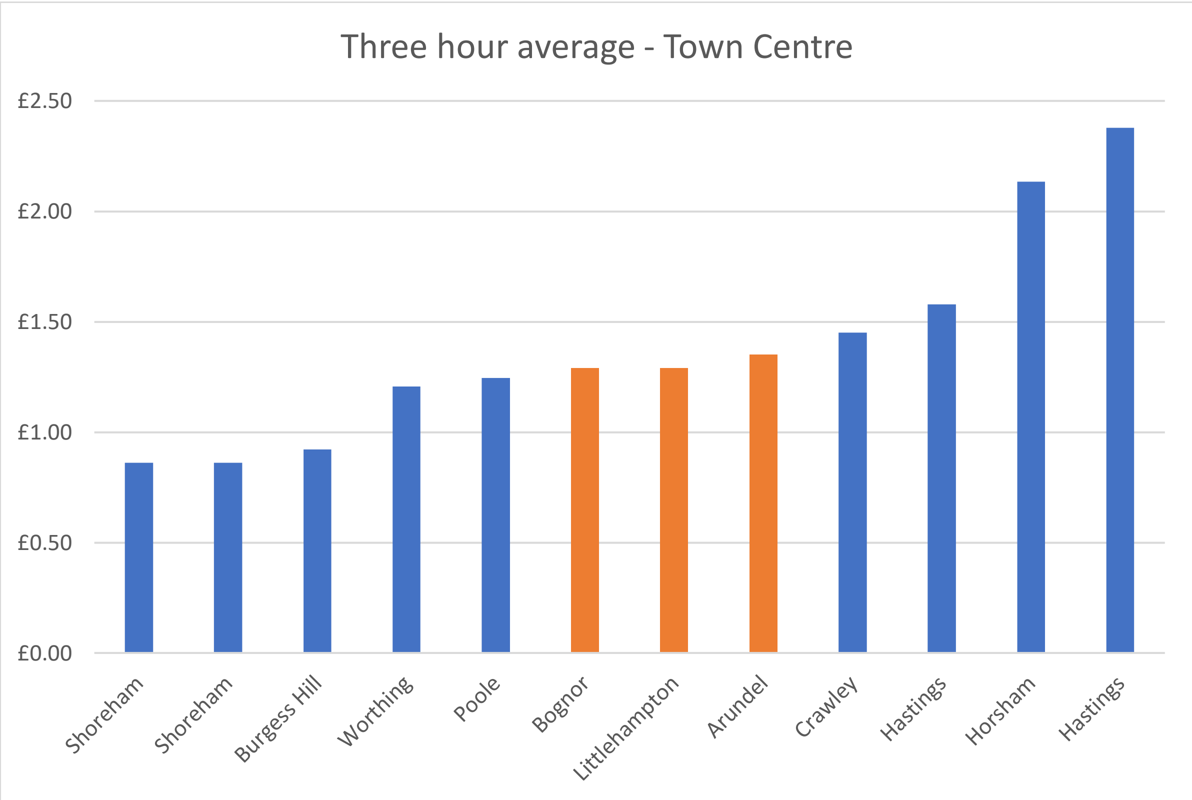
ADC suggested some comparator settlements with similar characteristics or geographical location, and we have added these to this list along with our own database of parking tariffs.

3.5 Town Centre Tariffs

There is wide variation in short stay tariffs which reflects the differences between the local market and the ‘offer’ of the town centres and the supply and demand for parking.

Figure 17 shows the price of three hour stays in town centre car parks (average per hour). Arun car parks are broadly in the middle of the range. This seems to reflect the retail offer which achieves a higher RVI score than either Shoreham, but with a less extensive offer than Crawley or Horsham. Considering the towns overall, the demand and the available information, the tariffs in Arun appear to reasonably reflect the towns’ offers.

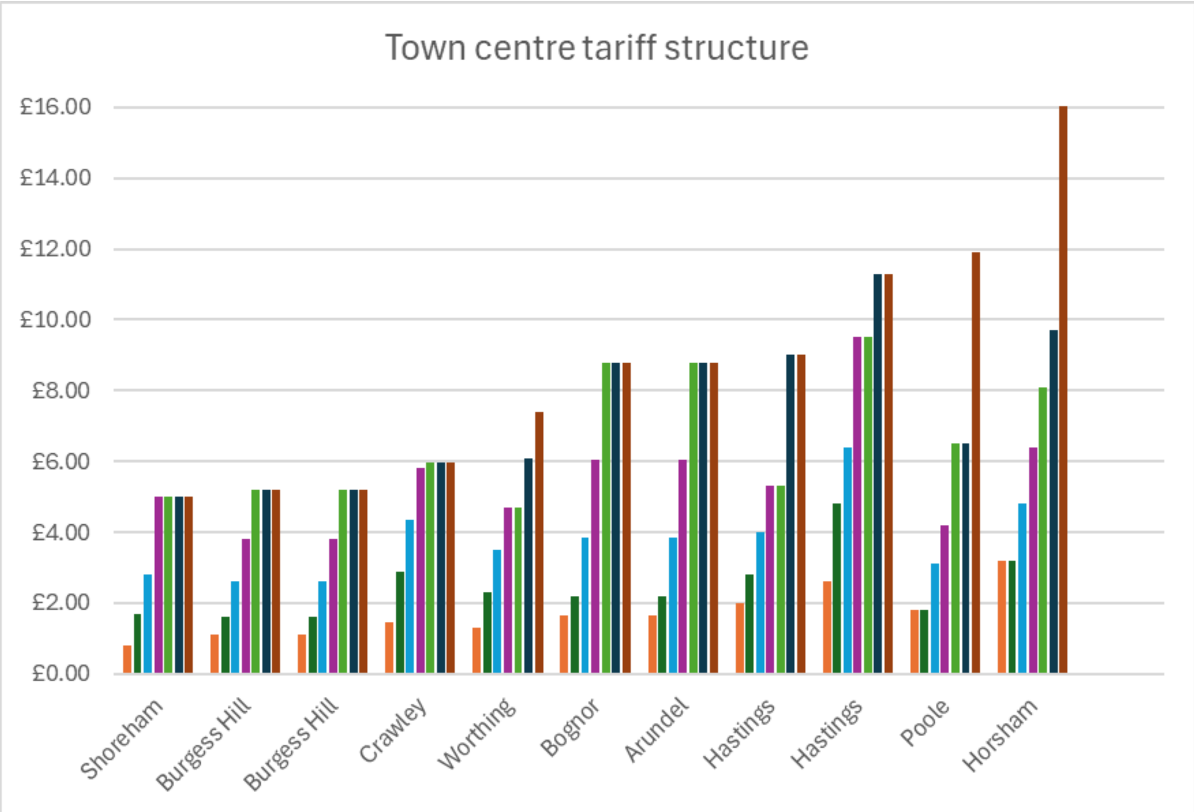
Figure 17. Comparison of the price of an hour over three hours



When looking at the tariff structure in more detail there some differences between Arun and other places stand out:

- Tariffs below 2hrs seem very good value, this may be because they have to ‘compete’ with the 2 hours free disc parking scheme
- There is a sharp increase in the 4hr and over tariff. This would allow the shrewd customer to use purchase multiple 2hr tariffs to save significantly
- Although the conditions of use for parking discs states that a disc may only be used once a day, enforcement of this will be very difficult, although not impossible given modern handheld systems which record license plate. This provides shrewd customers with the ability to, for example, use a disc for two hours, pay for parking for two hours, and then (illegally) use the disc again (if undetected), securing 6 hrs parking for £2.20
- The longer stay tariffs, i.e. those over 4hrs seem high compared to other places. This could be making up for the loss of revenue arising from the 2hr disc scheme
- That discs can be used on some sites but not others nearby for example, St Martins but not Surrey St. To reinforce the point, a conversation was overheard on the site visits questioning why anyone would ever use Surrey St given that “free” parking could be secured nearby.

Figure 18. Town centre car parks tariff structure



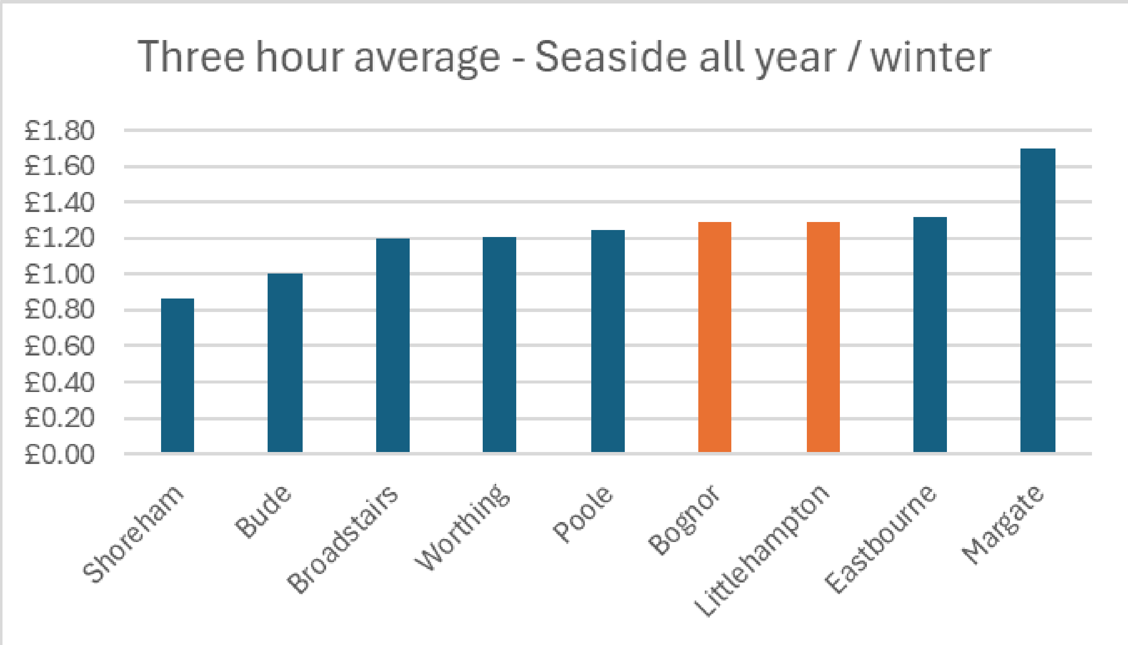
3.6 Seaside Parking Tariffs

Seaside tariffs need to be split between low season and high season. There are multiple factors that make direct comparisons difficult including what the destination offers, the supply of demand for parking, mode share of visitors (and policy), and ease of access from major inland settlements.

As an example, Brighton is very well connected to London by public transport, very popular and has a world-famous range of attractions. As a result, parking rates in Brighton can be as high as £24 for 4hrs. In contrast, places in the north or west of the country far from major population centres still have free seaside parking. In another nearby example, Shoreham, there is a large MSCP on the seafront, and so the low tariff may reflect the ample supply of parking. In summary, the price should reflect the offer and the supply.

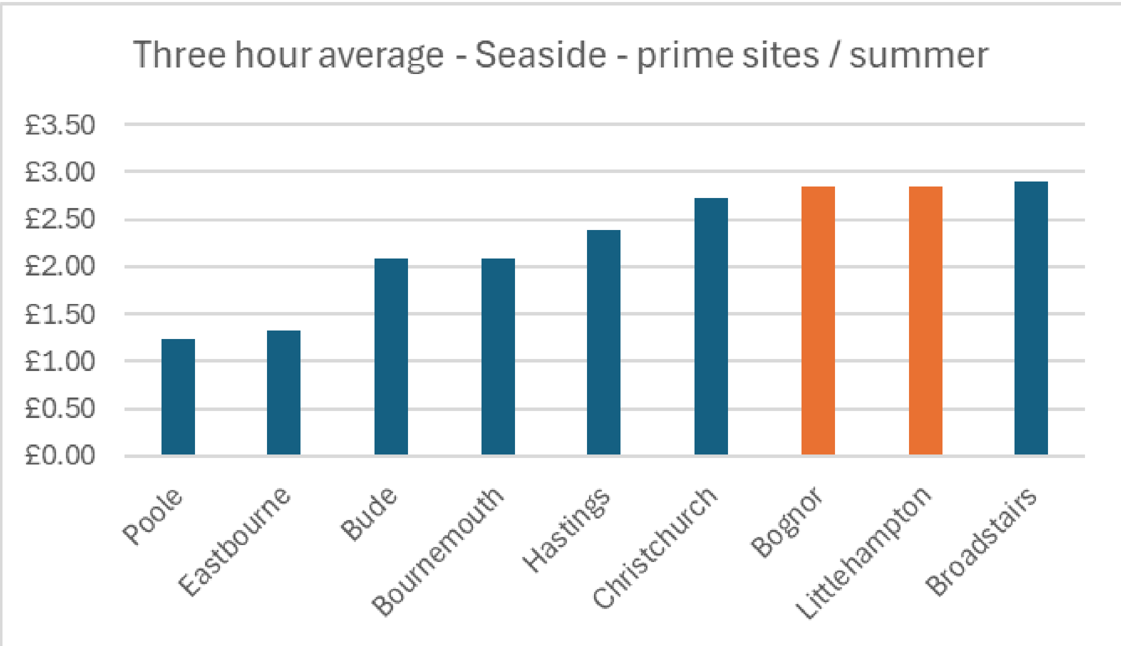
Our 'best estimate' at comparable car parks and places is shown below.

Figure 19. Comparison of the price of an hour over three hours



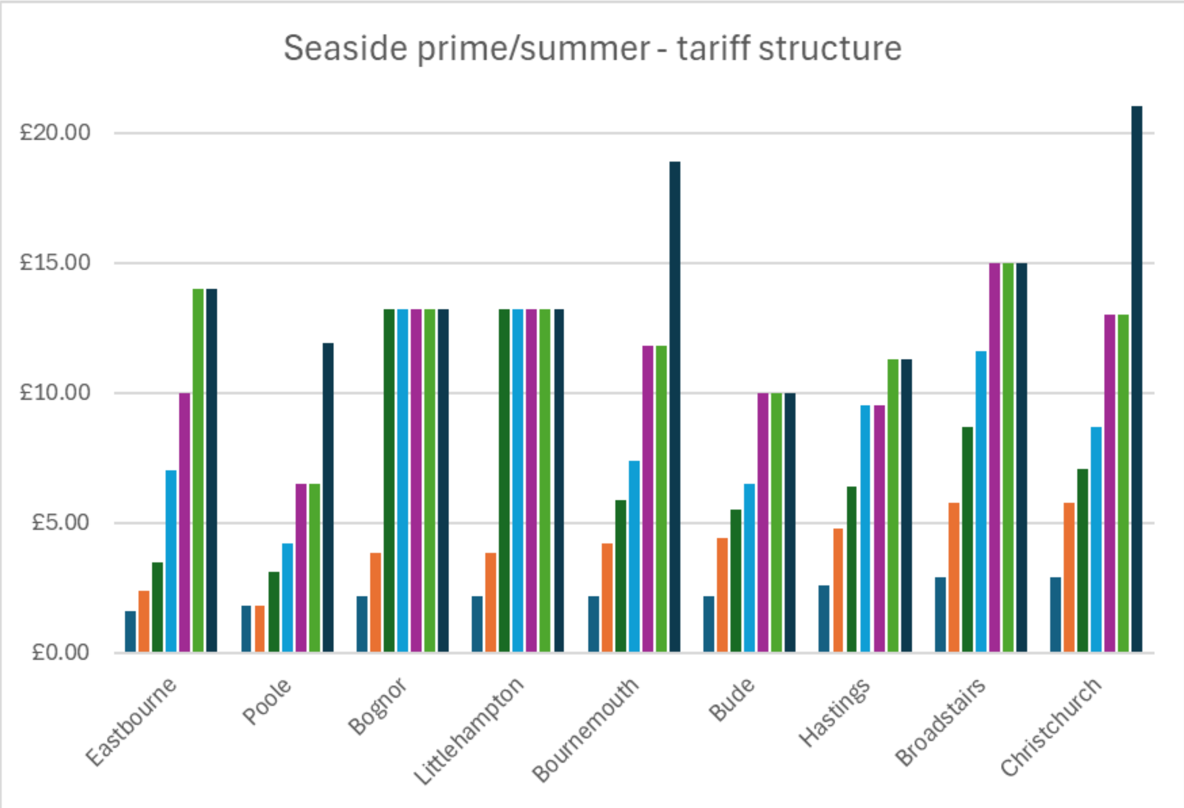
As with town centre sites, Arun's low season 3hr tariff average seems 'reasonable' given the current offer and convenient location to inland settlements.

Figure 20. Comparison of the price of an hour over three hours



At first glance, prices for 'prime' sites in the summer, i.e. those close to major attractions such as beaches, piers and fairgrounds seem high, but the underlying tariff structure explains this as the maximum all-day charge comes into effect on the third hour, whereas in most places' tariffs ramp up to the maximum over 5 or 6hrs.

Figure 21. Seaside car parks tariff structure



The sudden ramp up to an all-day from a 2hr tariff is unusual, but not unheard of (e.g. Swansea). Without detailed length of stay surveys or at least more comprehensive occupancy surveys across a very busy week, it would be difficult to model the financial impact of introducing tariffs for interim lengths of stay; i.e. whether a 3 or 4hr tariffs would encourage stays longer than 2hrs, or simply reduce net income as fewer all-day tariffs are being purchased. But there is likely an overwhelming case for introducing interim tariffs between the 2hr and all day from a customer service perspective, as the current rate for 3,4,5hr stays is expensive when compared to other places.

Fundamentally, even the highest all-day tariff represents a small proportion of likely spend, for example, a round of ice creams for the family, and is still likely to be cheaper than the alternative train/ bus fare for a car with more than one or two occupants.

3.7 Tariff Benchmarking Conclusions

The key conclusions at this stage are:

- Town centre tariffs seem reasonable within the context of the towns and the supply/ demand information available
- Town centre tariffs include some anomalies such as the two 2hr tariffs being cheaper than one 4 hr tariff, however the disc parking scheme may limit the ability to tackle this.
- Seaside tariffs look expensive compared to benchmarks because the all-day rate is applied after only two hours
- Both town centre and seaside tariffs would benefit from the introduction of interim tariff bands to give customers more options about how long they wish to stay, although top up is available

- Disc parking is probably distorting the market and influencing driver behaviour by encouraging stays of up to 2hrs
- Disc parking is almost certainly having a major impact on income levels (perhaps up to 80% of income at some sites). It is also difficult to enforce.

The financial impact of disc parking, and potential policy responses will be considered in the next stage of the study.

3.8 Season Tickets

Season tickets are more difficult to compare than daily or hourly tariffs because they are more complicated. Season tickets often relate only to one or a selection of car parks, across car parks with different tariffs, may apply over the whole week, just apply Mon-Sat or Mon-Fri and are often only available to certain groups of users. Where possible we have selected equivalents, i.e. 7 days a week, seasonal tickets.

As the most important number for comparison is the % discount on the full daily rate we have annualised and calculated as follows:

- Mon – Fri, 20 days for a month: 130 days for 6 months, 260 days for a year
- Mon – Sat, 26 days for a month: 155 days for 6 months, 312 days for a year
- Mon – Sun, 360 days for the year.

The comparison can only be an illustration to aid decision making and not a 'formula' for setting the price. The figure below suggests that Arun town centre season tickets offer generous discounts over the year, although this level of discount is not uncommon. The seasonal season tickets are extremely generous when it comes to the coastal, seaside car parks. The only example we have of more generous season tickets is in Poole and Sandbanks, where they are only available to residents.

Figure 22. Discount given on full daily rate of season tickets.

	Month	6mo	Year
Ely	85%		46%
Burgess Hill	27%		47%
Bude	39%	45%	49%
East Grinstead	38%		55%
Bedford	55%		56%
Fleetwood	51%	63%	73%
Chichester	72%	74%	75%
Margate Discount	62%	75%	80%
Adur Town Centre	28%		80%
Margate LS	68%	77%	82%
Sanbanks Winter		84%	84%
Margate All	79%	83%	86%
Fakenham		87%	89%
Arun Summer		92%	96%
Arun Winter		93%	96%
Sandbanks Summer		97%	97%

5. Town and Site Analysis

In this section we consider the car parks in each town individually. Considering the sites, their function and quality, and then site-specific issues that have arisen during the base case stage.

3.9 General Condition

We have considered the general condition of the car parks in Arun based on the ParkMark Safer Parking award[6] and our decades of experience of planning, surveying, building and operating car parks. Based on:

- **Payment options,** which include the range of options on offer.
- An **Accessibility** assessment which includes considering step free design, pedestrian and wheelchair access (i.e. good surfacing) and quality and availability of pedestrian routes to and from the sites. In MSCPs this includes the availability and condition of lifts.
- **Security and Safety** which considers the general impression of the safety such as lighting, evidence of anti-social behaviour, CCTV, natural surveillance, absence of presence of blind corners, and alley ways.
- **General Condition** includes the size of bays, the quality of the lining and other markings and the quality of the surface.
- **Signage and wayfinding** include internal signage and wayfinding to and from the site, circulation signage and information signage.
- **Layout and efficiency** consider how well the layout works but reflects that many car parks are the 'art of the possible'. Surface car parks must usually fit around the urban form rather than having been purpose built, planned and designed.

Figure 23. General condition assessment

		Payment Options	Accessibility	Security and Safety	General condition	Signage and wayfinding	Layout and efficiency	
Crown Yard	Arundel	VG	F	F	G	F	G	Difficult shape, very efficient.
Regis Centre	Bognor Regis	VG	VG	VG	VG	G	G	Awkward one-way system.
Fitzleet	Bognor Regis	VG	VG	G	F	F	G	MSCP, well lit. CCTV. Poor exit. Worse surface from level 3.
Hothamton	Bognor Regis	VG	VG	VG	VG	G	G	Newly surfaced.
London Rd	Bognor Regis	VG	G	G	G	F	G	Public toilets closed for refurbishment.
Lyon Street	Bognor Regis	VG	VG	G	G	G	G	
Hotham Park	Bognor Regis	VG	G	G	G	G	G	
Gloucester Rd	Bognor Regis	VG	F	F	P	F	P	Pedestrian desire line unsatisfied. Half of the site with very poor surface.
Rock Garden	Bognor Regis	VG	G	F	G	F	G	Very small site .
West Park	Bognor Regis	VG	G	G	G	G	G	
Culver Rd	Bognor Regis	VG	F	P	F	P	P	No natural overlooking, unlit.

[6] https://www.britishparking.co.uk/write/Documents/safer%20parking/SPS%20Assessment%20Guidelines%20 2010.pdf

Manor House	Littlehampton	VG	G	G	G	G	G	Layout is likely 'best available'.
Surrey St	Littlehampton	VG	G	F	F	P	F	Layout is likely 'best available'.
River Rd	Littlehampton	VG	VG	VG	VG	F	G	Layout is likely 'best available'.
St Martins	Littlehampton	VG	VG	G	VG	G	VG	Newly renewed.
Anchor Springs	Littlehampton	VG	VG	G	G	G	G	
East Green	Littlehampton	VG	VG	G	P	F	F	Unsurfaced sections with fire damage.
West Green	Littlehampton	G	G	G	P	F	F	Poor surface (planned for improvements).
West Beach	Littlehampton	VG	F	P	P	P	P	Unusual linear site.
Mewsbrook	Littlehampton	VG	G	VG	VG	G	G	Pot. Opportunity for increased capacity.
Sea Rd	Littlehampton	VG	VG	VG	G	G	VG	
The Wall	Littlehampton	VG	G	G	G	G	G	
Banjo Rd	Littlehampton	G	G	G	G	G	P	Coach Park, but with 2m height limit.

In general, the condition and layout of sites is good or very good. Specific issues are considered below.

3.10 Arundel

Only Crown Yard is in scope, but ADC support the Lido car park and own a small area of land to the south which is currently being used to construct flood defences. Crown Yard’s layout is likely to be the ‘best available’ given the restrictions on the site. The presence of free on-street parking nearby, albeit in great demand, could limit the ability for tariff increases.

The agreement with the Lido is almost certainly running at a loss for ADC who enforce the site but do not receive a share of the revenue. This is a decision for ADC as this could be justified under their objectives to support community facilities within the district. There is no obvious new site to increase the supply of parking, nor any argument for reducing it.

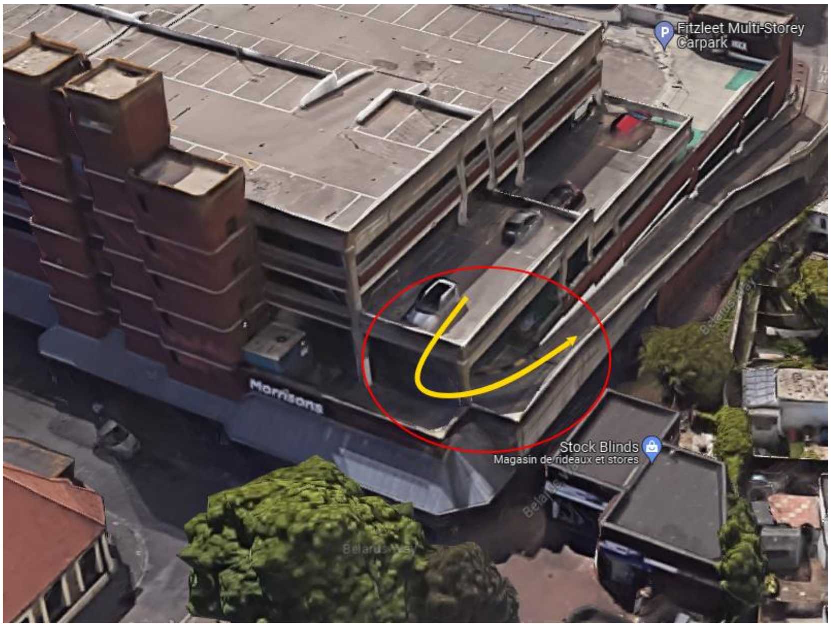
3.11 Bognor Regis

Overall, the general quality of sites is good. Some site-specific comments are included below:

Fitzleet MSCP

Despite external impressions typical of a 1970s multi-storey construction, Fitzleet MSCP is in good overall condition in comparison to many we see each year. The surfacing above floors 3 /4 needs improvement. Bay sizes are small by modern standards on upper levels and limited by the width between columns. Bays in some areas have already been widened to two bays between each column which are reportedly popular. This approach could be extended given the low occupancy. The convenience of the site for larger modern vehicles is limited by a sharp corner and narrow exit which would be difficult to improve without specialist engineering advice (see Figure 24).

Figure 24. Exit limiting convenience for larger modern cars.



Gloucester Rd

Gloucester Rd is a mixed site part owned by Butlins, and part owned by ADC. ADC pay a proportion of the income to Butlins. There is some signage clutter as a result of the land train using it as a terminus. The southern half of the site is unsurfaced with an uneven surface.

The land ownership would make separating the site difficult but not impossible. There is an unmet pedestrian desire line passing through the centre of the site north-south which has been fenced off for safety given the approximately 1.2m height difference between the two sections. Improving this would require a specialist engineer.

Figure 25. Gloucester Rd

Rock Gardens and Culver Rd

Rock Gardens achieves only modest revenue even in the summer. It is hard to find and very small. Regular visitors will likely be dissuaded because of the size and the difficult manoeuvre required to exit if it is full on arrival.

Culver Rd is similar to Rock Gardens, small, hidden and earning little income. We observed a car with a roof box having to reverse at the height barrier, so it has limited use for vans or tourists on holiday with water sports equipment on the roof. There is no development opportunity given the site form and proximity to neighbouring residential uses.

West Park

There is reportedly pressure from local organisations to extend the disc parking scheme to this car park. There does not appear to be a case for this given the low 1hr tariff on the site and what is known about customer behaviour having little regard to charges as long as they are reasonable and transactions easy to make.

Regis Centre

Regis Centre is a popular site close to the beach. There is a hotel being built to the south and east of the site and an agreement that charges for overnight parking will not be brought in. The site also serves a theatre. The scope for improvements is limited by the shape and size.

3.12 Littlehampton

The Littlehampton parking estate is less coherent than in Bognor Regis, consisting of a wide variety of site types. These range from typical town centre sites such as St Martins to unusual and difficult-to-manage sites such as River Road and West Beach.

Surrey Street

The layout of Surrey Street is complicated by private parking on the eastern edge, RNLI parking in the southeast, and boat trailer parking. Although the current layout seems to maximise available spaces while maintaining access to all parking spaces and to surrounding properties, it could be worth commissioning a redesign as this would likely cost very little.

There is a double sign installed with directions to nearest alternative parking on Surrey St near the entrance. Consulting this sign would require locating it, stopping the vehicle, and then being able to understand and remember it. With the ubiquitous use of mobile phones and sat-navs, it could well be superfluous. It could be relocated into the car park, perhaps by the payment machine, where it might be useful to anyone arriving and finding Surrey Street is full.

Figure 26. Complex diagrams which aim to direct motorists to parking

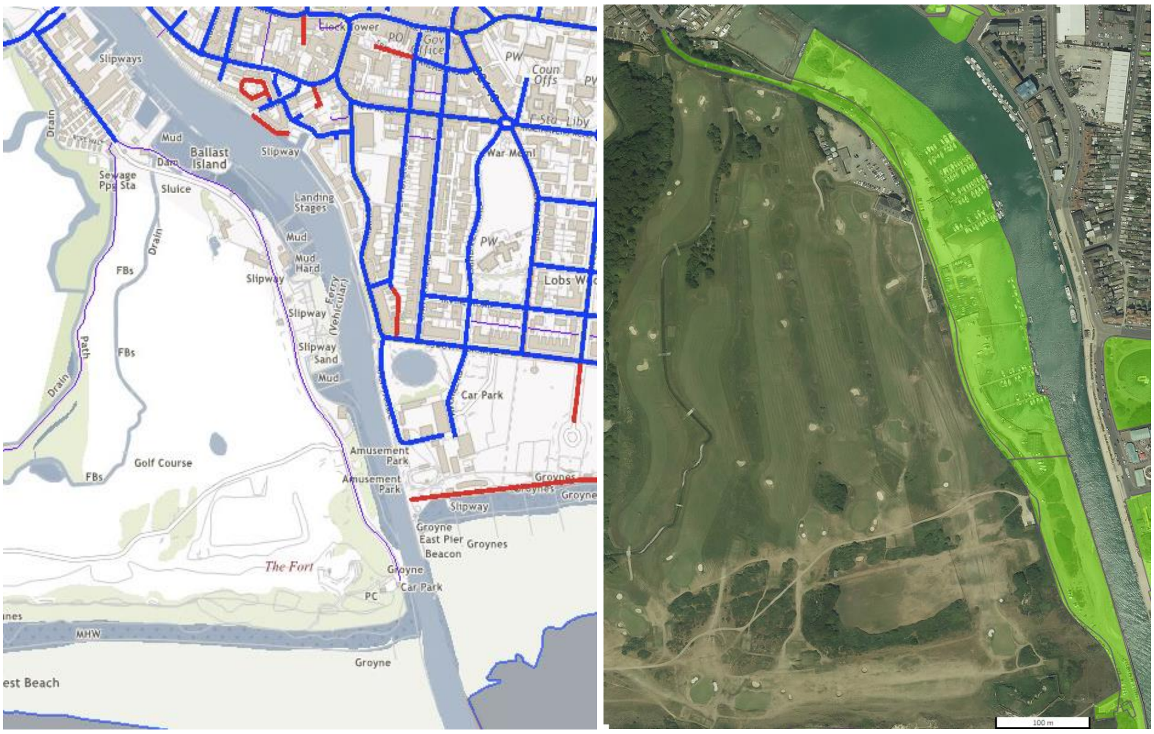
West Green and East Green

West Green has large areas of unsurfaced parking that are very potholed, uneven and need improvement. It is expected that these improvements will form part of the nearby regeneration project due to start soon. East Green also has an unsurfaced parking section to the north. There seems to be fire damage on the unsurfaced section of the site.

West Beach

West Beach is an unusual site with a large section of what seems to be an unadopted road, marked as 'T' on the WSCC Adopted Roads map. It is labelled as a “Public right of way or track (limited maintenance) – part of the road network but not publicly maintainable highway.” Ownership appears to be with ADC. The complicated and unusual nature of these sorts of sites often make significant change too difficult or not cost effective. Additional passing places and spaces could be found if there is demand.

Figure 27. Extracts from the WSCC Adopted Roads Map (left) and ADC property gazetteer



Mewsbrook

Mewsbrook is shared between the leisure centre, public parking, and some coach parking. There is a very generous 5-hour free parking scheme in place for visitors to the leisure centre where VRMs are inputted into a point-of-sale device by reception. Although this is clearly open to abuse, measuring this will be difficult without length of stay data. The principle of a 5-hour stay should be reviewed, as a 3hr stay should be ample for the large majority of leisure centre visitors. (By comparison, the centre at Downham in Lewisham and that at Norwich Riverside allow 2.5 hours free parking.) Visitor parking for special events requiring longer stays could be the subject of special arrangements, and staff parking is provided in a designated area.

3.13 London Rd and Banjo Rd Coach and Lorry Parking

London Road Lorry and Coach Park appears to be underutilised. With almost no recorded use during the survey days and a very small income of £,1515 in 2023/24.

Many authorities across the country with a significant tourist market seek sites for overnight camping cars. The presence of an existing public toilet could make London Rd an ideal location for overnight camping without the need to find a new site.

There exist low-cost options used across Europe and in the Scottish Highlands to encourage camping car tourism which include unstaffed sites and / or chemical toilet disposal for a small ongoing revenue cost.

It should be noted that at the time of the site visit the London Rd public toilet was closed for refurbishment.

Figure 28: Low-cost option for toilet disposal

Coach Parking – London Rd and Banjo Rd

Whilst their value to towns and cities is well documented[7], coach parking remains an issue in towns nationwide especially in popular tourist areas. The challenge is twofold: 1) locating safe and convenient drop-off and pick-up areas for passengers, and 2) finding sites that can handle large coaches and are cost-effective. Additionally, coach operators and drivers influence destinations, so systems must be set up to make booking and parking easy and attractive for them.

The facilities in Arun should be retained unless there is a compelling case for disposal based on the wider economic benefits of facilitating coaches.

[7] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/guidance_coach_prospectus.pdf

6. Overall conclusions

The urban, but lower density nature the of the district means that many residents need to use their cars, and this is reflected in Census and DVLA data on car use and ownership. This will create increasing pressure on both on and off-street parking.

West Sussex County Council and Adur District Council have policies in place to manage single occupancy car use and parking, and support actions to reduce the impact of traffic in the West Sussex Transport Plan and the Local Plan.

The surveys suggest that many of Arun's car parks are reasonably full for much of the day. However, the picture is very mixed, with different usage patterns, user profiles and levels of use across the parking estate. Use of the estate is highly seasonal as evidenced by transaction data.

The estate performs reasonably well in income terms, but this performance is limited by having a two-hour discounted parking disc scheme in place in some of the towns' busiest car parks. This may also be encouraging stays below the 3hrs which many retail owners consider to be optimum dwell time.

There are some specific issues on individual sites which have been discussed and these will require further investigation in the next stage.

6.1 Next Stage

Stage 2 of the study will consider the operations and policy options available to Arun to improve the performance of the estate and parking service from policy, financial and asset perspectives. This will include considering how the service operates, tariff changes, technology options, and future demand.

7. Glossary

ADC	Arun District Council	The local council responsible for off street parking provision covered by the Off-street Parking Order
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
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	Government department responsible for national transport policy
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	
ONS	Office of National Statistics	Government Agency charged with collection, analysis and publication of statistics.
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
RVI	Retail Vitality Index	A national index published by Harper Dennis Hobbs, a leading retail consultant
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