Guildford Town Centre Parking Strategic Review

Stage 1: Parking Demand

Revised final draft

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1 Introduction

Why Have a Parking Strategy?

1.1 Guildford is the principal shopping centre in Surrey and a thriving employment centre, cultural centre, and transport hub that attracts workers, shoppers, and leisure travellers from a comparatively large catchment across Surrey, Hampshire, Sussex, and beyond. The destinations of these trips are primarily in the town centre, meaning that traffic movements of travellers across the town centre, at peak times in particular, are significant. Guildford has also evolved as a result of its geographic position on north-south road and rail routes between London, the south coast and the south west, and has two major road routes (the A3 and A31 / A25) effectively running through the centre of the town, making access by car comparatively easy and the demand for parking high.

1.2 Park and Ride is an important part of the Guildford transport network, reducing the demand for town centre parking and reducing town centre congestion. Following a successful bid for funding from the Local Sustainable Transport Fund, the new Onslow Park and Ride site is under construction to the west of the town and is due to open later in the year.

1.3 Due to the high demand for travel to Guildford town centre, parking is a significant issue and occupancy rates for the public off-street car parks are generally high, despite the current economic climate. There are 500 on-street Pay and Display bays available for limited durations; 30 minutes, two hours and a limited number of three-hour bays.

1.4 With proposed town centre development increasing commercial and retail floor space and the demand for parking, coupled with a potential reduction in the number of parking spaces, and potential increased traffic levels resulting from capacity increases at the A3 at Hindhead, a suitable parking strategy is needed to help manage travel demand.

1.5 The objectives of the strategy are that car parking:

- Is managed in a manner consistent with overall transport and economic development objectives;
- Is maintained to the level required to support economic growth;
- In central Guildford is prioritised for short-term users with long term users being encouraged to park in more peripheral areas;
- Is managed and maintained by the Borough Council;
- Tariffs, signing and management are clear to the user; and
- Usage is actively monitored and reported on.

Policy Context

Surrey County Council Policy

Local Transport Plan 2011-2026 (Surrey County Council, 2011)

1.6 Surrey County Council is the statutory Local Highway Authority and Passenger Transport Authority. The Council has set out its vision and objectives for the future of transport in the Local Transport Plan. Surrey County Council's responsibilities in respect to parking include on-street parking provision, civil parking enforcement, residential parking, Park and Ride, and parking demand management. A daughter document to the Local Transport Plan, the Parking Strategy (which was updated in April 2011) is designed to help shape, manage and deliver the County Council's vision for parking and to *"Provide parking where appropriate, control parking where necessary."*

1.7 The objectives of the Parking Strategy are:

- reduce congestion caused by parked vehicles;
- make the best use of parking space available;
- enforce parking regulations fairly and efficiently; and
- provide appropriate parking where needed.

1.8 To achieve these objectives, work will be channelled through three main areas:

- management of on-street parking – managing on-street parking to ensure optimum use;
- operation of civil parking enforcement – fair and cost effective processes to reduce inappropriate parking; and
- parking provision and policies – new development to have appropriate levels for their function and use.

1.9 Since parking enforcement was decriminalised in Surrey, enforcement has been carried out by the eleven boroughs and districts on behalf of the County Council, under agency agreements. Guildford Borough Council is responsible for the operation of the majority of the off-street car parks in the town, as well as enforcement of on-street provision.

Guildford Borough Council Policy

1.10 Guildford Borough Council's key strategic priorities are:

- excellence and value for money - providing efficient, cost-effective and relevant quality public services;
- sustainable local environment - preserving and enhancing a sustainable environment, both rural and urban, within Guildford Borough;
- safe and vibrant community -ensuring our diverse community can live in safety and with dignity; and
- dynamic economy - encouraging a vibrant business and knowledge based local economy.

1.11 Parking can influence all of these priorities. Guildford Borough Council is currently producing the Council's new Local Plan in order to develop the Council's Local Development Framework; the *Guildford Development Framework*. The *Guildford Development Framework* is a series of planning documents that will set out how the Borough will change up to 2026. The *Guildford Development Framework* will set out the most sustainable locations and ways for development to happen. It will aim to preserve and enhance the distinct character of Guildford Borough while at the same time meet local needs and national targets. Unlike the current Guildford Local Plan, the *Guilford Development Framework* goes beyond land-use planning, to consider 'spatial' issues, involving the use of land and the movement of people and access to opportunities including guidance on parking, including parking standards.

Guildford Interim Town Centre Framework (Guildford Borough Council, 2011)

1.12 The framework is a strategy that will help to shape how Guildford town centre will look and function to 2030. This timeframe links with the Council's draft Economic Strategy 2012 and with the proposed *Guildford Local Plan Strategy*

Guildford Borough Parking Strategy (Guildford Brought Council, 2004)

1.13 The previous parking strategy for Guildford, which this document is designed to replace, was agreed by Guildford Borough Councils and Surrey County Council and aimed to maintain existing levels of short-stay provision, in response to redevelopment of town centre car parks. The aim was to assist shoppers, businesses, visitors, and residents, while supporting phased reductions in town centre long-stay parking as more Park & Ride spaces became available and / or significant improvements were made to public transport.

Summary

1.14 There will be a challenging balance to meet the borough's vision and objectives for local growth in Guildford's commercial offer and the desire to reduce traffic congestion through the town. Demand for parking will increase in response to the expanding local economy and well considered parking policies can do much to manage demand and mitigate its impact. Guildford Borough Council is already doing this by encouraging longer-stay commuter traffic to use the long stay car parks on the edge of the town as well as expanding the Park and Ride offer, while supporting the town's retail offer with short-stay parking in the centre.

Structure of Report

1.15 This Stage 1 report forms an evidence base for a car parking strategy and documents the assessment of the need for parking in the town centre over the next 20 years taking into account:

- potential developments;
- the need for short-stay and long-stay parking to support the needs of the local economy;
- the level of parking in competing centres;
- the level of public transport including Park & Ride;
- likely trends in retail activity; and
- traffic management issues.

1.16 With some degree of uncertainty of the status of a number of key town centre sites, the report draws conclusions about the amount of parking needed based on a number of development scenarios.

2 Parking and Travel in Guildford

Off-Street Car Parking Supply

2.1 There are currently 4,837 public off-street spaces in Guildford town centre from Monday to Friday, rising to 5,119 spaces at the weekend, as spaces leased to local business and organisations during the week become available for weekend use. Spaces are spread across a total of 25 Council car parks, Debenhams car park and the car park at the rail station. There are five multi-storey car parks (MSCPs) located in the town centre, which are five of the six largest car parks available, accounting for over half of the total town centre provision (3,300 spaces). The biggest of these is Bedford Road, which has just over 1,000 spaces. Guildford Borough Council's recent policy has been to provide short-stay parking in the centre of Guildford to support the local retail offer, while commuters are encouraged (by pricing mechanisms) to use the longer stay car parks toward the edges of the town centre and the three Park and Ride sites outside the town.

2.2 Table 2.2 shows the current off-street parking mix provided by Guildford Borough Council, along with parking charges. The current short-stay / long-stay mix is:

- Weekday: short stay 2,832 (59%) / long-stay 2,005 (41%)
- Weekend: short stay 3,180 (62%) / long-stay 1,939 (38%)

2.3 Additional parking spaces are provided at the three Park & Ride sites outside the town centre at:

- Artington: 720 spaces (Monday to Saturday)
- Merrow: 320 spaces (Monday to Saturday)
- Spectrum: 1,000 spaces shared with leisure centre (Monday to Friday)
- Onslow: 550 spaces *(currently under construction– due to open late 2013)*

2.4 In addition to the Council-run car parks, there are around 400 car parking spaces provided by South West Trains at Guildford Station[1]. There are three areas within the car park, Standard, Premium and Smart Car. Table 2.1 below sets out the different charges for each category.

[1] London Road Station also has car parking available to rail users.

TABLE 2.1 GUILDFORD STATION PARKING

Car Park category	Standard	Premium	Smart-Car
No. of spaces	330	77	-
Daily charge	£9.50	£14.50	£5.70
Off-peak charge	£5.00 (from 11.15am)	£4 (from 4:00pm)	£1.20 (from 4;00pm)
Saturday charge	£5.00	£10.00	£3.60
Sunday charge	£1.00	£2.00	£0.60
Weekend charge	£9.00 (from 11.15am Friday)	£16.00 (from 12:00pm Friday)	£4.80 (from 12:00pm Friday)

2.5 There is also a 250 space area in the Farnham Road multi-storey car park available to season ticket holders only, which costs £465 for 3 months and £1,800 for an annual ticket.

2.6 London Road Station also has car parking available to rail users which is slightly cheaper than the main Guildford station car park, with a £6 daily charge and an annual ticket costing £890. Debenhams department store also provides 40 underground parking spaces.

TABLE 2.2 COUNCIL OPERATED OFF-STREET CAR PARK

Name	Designation	Spaces	Daytime - Monday to Saturday				Evenings		Sunday	
			1st hour	2nd hour	3rd hour	Each subsequent hour	Per Visit	Per Visit	Per Visit	
			Monday to Saturday including Bank Holidays 8am-6pm				Monday to Saturday 6pm-10pm	Sunday 5pm-10pm	Sunday 11am-5pm	Per Visit
Bedford Road Multi Storey Car Park	Short stay	1033	£1.20	£1.20	£1.20	£1.20	£1.00	£1.00	£1.50 per visit	
Millbrook	Short stay	244	£1.20	£1.20	£1.20	£1.20	£1.00	£1.00	£1.50 per visit	
G Live	Short stay	220	£1.20	£1.20	£1.20	£1.20	£1.00	£1.00	£1.50 per visit	
Mary Road	Short stay	107	£1.20	£1.20	£1.20	£1.20	£1.00	£1.00	£1.50 per visit	
Bright Hill	Short stay	121	£1.20	£1.20	£1.20	£1.20	£1.00	£1.00	Up to 3 hours £1.50. 3-6 hours £2.50	
Bedford Road Surface	Short stay	68	£1.20	£1.20	£1.20	£1.20	£1.00	£1.00	Up to 3 hours £1.50. 3-6 hours £2.50	
Castle Multi Storey Car Park	Short stay	350	£1.20	£1.20	£1.20	£2.00	£1.00	£1.00	Up to 3 hours £1.50. 3-6 hours £2.50	
Leapale Road Multi Storey Car Park	Short stay	384	£1.20	£1.20	£1.20	£2.00	£1.00	£1.00	Up to 3 hours £1.50. 3-6 hours £2.50	
Commercial Road 2	Short stay	52	£1.20	£1.20	£1.20	£2.00	£1.00	£1.00	Up to 3 hours £1.50. 3-6 hours £2.50	
Old Police Station	Short stay	62	£1.20	£1.20	£1.20	£2.00	£1.00	£1.00	Up to 3 hours £1.50. 3-6 hours £2.50	
Upper High Street	Short stay	49	£1.20	£1.20	£1.20	£2.00	£1.00	£1.00	Up to 3 hours £1.50. 3-6 hours £2.50	

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Name	Designation	Spaces	Daytime - Monday to Saturday				Evenings		Sunday	
			1st hour	2nd hour	3rd hour	Each subsequent hour	Per Visit	Per Visit	Per Visit	
Tunsgate	Short stay	64	£1.20	£1.20	£1.20	£2.00	£1.00	£1.00	Up to 3 hours £1.50. 3-6 hours £2.50	
			Monday to Saturday including Bank Holidays 7am-7pm				Monday to Saturday 7pm-7am (Per Hour)	Sunday 5pm-7am	Sunday 11am-5pm	Per Visit
Farnham Road Multi Storey Car Park	Long stay	917	£0.90	£0.90	£0.90	£0.90	£0.10	£0.10	£1.50 per visit	
			Mon-Sat Including Bank Holidays 8am-6pm				Monday to Saturday 6pm-10pm (Per Visit)	Sunday 5pm-10pm	Sunday 11am-5pm	Per Visit
York Road Multi Storey Car Park	Long stay	605	£0.90	£0.90	£0.90	£0.90	£1.00	£1.00	£1.50 per visit	
			Saturday Parking and Bank Holidays 8am-6pm				Monday to Saturday 6pm-10pm	Sunday 5pm-10pm	Sunday 11am-5pm	Per Visit
College Road/Bellerby	Short stay	71	£1.20	£1.20	£1.20	£1.20	Closed	Closed	£1.50 per visit	
Lawn Road	Short stay	107	£1.20	£1.20	£1.20	£1.20	Closed	Closed	£1.50 per visit	
Millmead House	Short stay	27	£1.20	£1.20	£1.20	£1.20	Closed	Closed	£1.50 per visit	
Robin Hood	Short stay	23	£1.20	£1.20	£1.20	£1.20	Closed	Closed	£1.50 per visit	
St Josephs	Short stay	71	£1.20	£1.20	£1.20	£1.20	Closed	Closed	£1.50 per visit	
Portsmouth Road	Short stay	98	£1.20	£1.20	£1.20	£1.20	£1.00	£1.00	Up to 3 hours £1.50. 3-6 hours £2.50	

Name	Designation	Spaces	Daytime - Monday to Saturday				Evenings		Sunday	
			1st hour	2nd hour	3rd hour	Each subsequent hour	Per Visit	Per Visit	Per Visit	
			Monday to Friday including Bank Holidays 8am-6pm			Saturday 8am-6pm	Mon-Sat 6pm-10pm	Sunday 5pm-10pm	Sunday 11am-5pm	Per Visit
Guildford Park	Long stay	400	£4.50 per visit			£1.00 per visit	Free	Free	Free	
Shalford Park	Long stay	66	£2.80 per visit			Closed	Free	Closed	Closed	
Walnut Tree Close	Long stay	17	£3.00 per visit			Free	Free	Free	Free	
Ash Vale Station	Short stay	29	£1.00 per visit 7am-4pm			Free	Free	Free	Free	
			Monday to Thursday 8am-6pm			Fri-Sat	Monday - Thursday 6pm-10pm & Friday - Saturday 8pm-10pm	Sunday 5pm-10pm	Sunday 11am-5pm	Per Visit
North Street	Short stay	49	£0.80 per 30 mins. Max stay 30 mins. No parking after 10pm Thursday			Closed	£1.00 per visit	£1.00	£0.80 per 30 mins	
TOTAL	**All**	**5234**								

On-Street Car Parking Supply

2.7 There are a number of areas within the town centre Controlled Parking Zone where Pay and Display on-street parking is permitted. These bays are restricted to either 30 minutes, two hours, or three hours of parking. The hours of operation are between 8:00am and 6:00pm Monday to Saturday.

2.8 Although classed as off-street, the main location for ‘on-street’ parking is North Street where there are 49 spaces provided, with charges of £0.80 for 30 minutes, with 30 minutes the maximum stay.

2.9 The other areas where on-street parking is located is Millmead, Sydenham Road, College Road, and Mary Road, with maximum two hour stays, and also further 30 minute bays on Upper High Street and Woodbridge Road.

Parking Occupancy

2.10 Drive-by surveys of the Council’s main off-street car parks were undertaken to determine ‘spot’ occupancy. Surveys were carried out in March 2012 and captured occupancy on a typical weekday (between 10:00am and 2:00pm), a Friday evening (between 8:00pm and 10:00pm) and a Saturday (between 10:00am an 3:00pm). Occupancy over these periods from these surveys is recorded in Table 2.3 overleaf.

TABLE 2.3 CAR PARK OCCUPANCY

	Spaces			Occupancy (%)		
	Weekday	Evening	Saturday	Weekday	Evening	Saturday
Bedford Road	1033	1033	1033	70%	30%	100%
Millbrook	224	224	224	70%	60%	80%
G Live	220	220	220	50%	95%	15%
Mary Road	107	107	107	50%	90%	20%
Bright Hill	121	121	121	70%	6%	85%
Bedford Road Surface	68	68	68	100%	100%	95%
Castle	350	350	350	68%	10%	96%
Leapale	384	384	384	50%	20%	90%
Commercial Road 2	52	52	52	90%	50%	100%
Old Police Station	62	62	62	100%	90%	100%
Upper High Street	49	49	49	90%	100%	100%
Tunsgate	64	64	64	100%	40%	100%
Farnham Long Stay	917	917	917	69%	15%	14%
York Road Long Stay	605	605	605	66%	15%	54%
College Road	0	0	71	*Ns*	*ns*	100%
Lawn Road	0	0	107	*Ns*	*ns*	20%
Millmead House	0	0	27	*Ns*	*ns*	50%
Robin Hood	0	0	23	*Ns*	*ns*	90%
St Josephs	0	0	71	*Ns*	*ns*	0%
Portsmouth Road	0	0	98	*Ns*	*ns*	100%
Guildford Park Long Stay	400	400	400	60%	20%	60%
Guildford Rail Station	407	407	407	90%	NS	50%
Debenhams	40	40	40	100%	NS	100%
Short-stay Spaces/ Occupancy	2774	2774	3171	68%	57%	82%
Long-stay Spaces/ Occupancy	2329	2329	2329	70%	14%	39%
Total Spaces / Occupancy	5103	5103	5500	69%	21%	63%

Ns - not surveyed

2.11 The current Guildford Parking Strategy aims to set charges to maintain 85% occupancy (at peak times) in short-stay car parks, thereby achieving high utilisation but reasonable levels of availability. From the surveys, occupancy across all town centre public off-street car parks was 69% for the weekday morning, with short-stay estimated at 68% and long-stay 70%. Occupancy was lower during the Friday evening survey at 21% occupancy across all town centre public off-street car parks (as on-street controls go off). Occupancy then increased again during the Saturday survey, with higher levels of occupancy in the more central short-stay car parks at 82% occupancy. This would translate to approximately 1,600 total free spaces during the weekday morning, 3,200 total free spaces Friday evening and 2,000 free spaces Saturday morning.

2.12 During the weekday survey, the car parks closest to the town centre were the busiest: Bedford Road (surface), Commercial Road, Old Police Station, Upper High Street and Tunsgate. During the Friday evening survey, the surface car parks in the town centre were very busy, while the multi-storey car parks were largely empty. During the Saturday survey, the town centre surface car parks were busiest, although Castle, Bedford Road and Leapale multi-storey car parks were at or near full occupancy by noon.

Seasonality

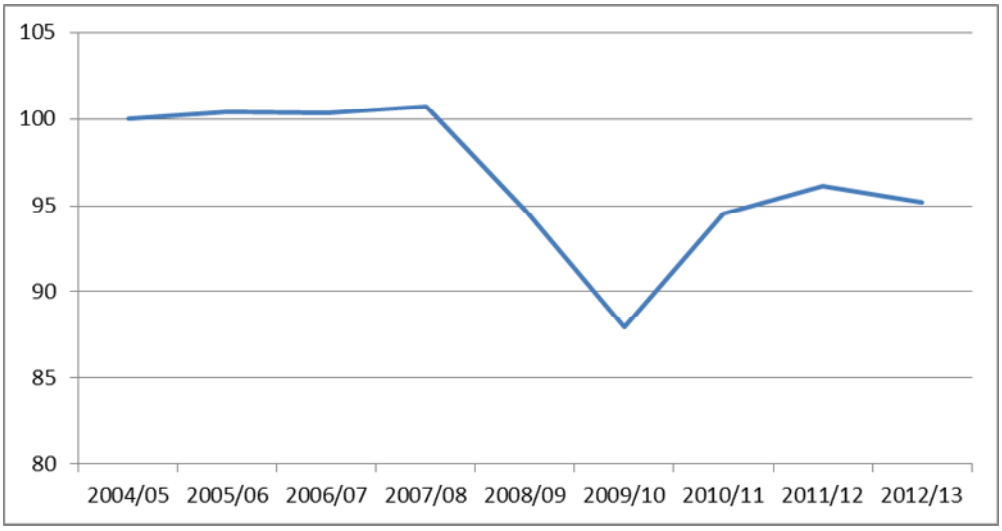
2.13 The surveys were carried out in March 2012. Based on analysis of off street parking ticket sales data from the last four years (2009/10 to 2012/13) data for March, as surveyed, is representative of average monthly car demand.

2.14 Across the year there are seasonal variations in demand for car parking across the town. The busiest months are July, October and December. The busiest month on average was October, with demand around 12% higher than the 12 month average (and therefore 12% higher than the March data we use in this report).

Recent Trends in Occupancy

2.15 Demand for parking is driven by many factors. Local and national economic conditions and the impact of the recent economic recessions should be considered when reviewing current occupancy figures. Historical ticket sale data from 2004/5 to 2012/13 has been analysed to understand the trends in parking demand over the last few years. Average monthly data, indexed to 2004 levels is plotted below in Figure 2.1.

FIGURE 2.1 INDEX OF OFF-STREET CAR PARKING TICKETS SALES



2.16 Inspection of the data shows a slight increase to 2007/08 and then a marked drop in ticket sales between 2008 and 2010, with ticket sales beginning to pick up again in 2011, but still below their 2004 levels. The reasons for the sharp drop in tickets between 2008 and 2010 are varied. 2008 marked the start of the 'credit crunch' in the UK and subsequent downturn in economic growth, as well as the introduction of free off-peak bus travel for people over 60 years' old. Late 2008 also saw the opening of the Merrow Park and Ride site while the existing Artington site had an additional 200 spaces added in December 2008. The Old Civic Hall car park closed in May 2009 and reopened as the G Live August 2011. The pick up in ticket sales from 2010/11 to 2012/13 is also partly driven by the introduction of an evening charge in April 2010 which lead to more pay and display tickets being sold.

Summary

2.17 Parking demand is still 6% lower from its last high in 2007/08. As such, there is still more capacity than in all years from 2004/05 to 2007/08. Extrapolating 2007/08 tickets sales to 2012 occupancy would see general increases in occupancy across all car parks, with Saturday short-stay at the target occupancy of 85%. Table 2.4 below illustrates.

2.18 Again it should be noted that this analysis is based on data collected in March, which is an average month for car park demand. Seasonal peaks, such as Christmas will increase these occupancy levels.

TABLE 2.4 ESTIMATED OCCUPANCY AT 2007/8 DEMAND LEVELS

Parking Supply Type	Weekday Occupancy	Friday Evening Occupancy	Saturday Occupancy
Short-stay	70%	58%	85%
Long-stay	68%	14%	37%
Average	71%	41%	68%

3 Parking Supply By Commercial Floor-Space

Introduction

3.1 The primary driver of off-street parking demand in Guildford is the commercial offer, retail and business. While Guildford is the regional shopping centre for Surrey, the health of the local retail economy and ultimately the demand for parking will also be largely influenced by the retail offer and parking policies of the local competing centres. The Town Centre Development Study (Cushman and Wakefield, 2010) identified a comprehensive retail offer in the area around Guildford, with retail competition coming from Kingston-upon-Thames, Basingstoke, Reading and Bracknell. Other local competitors were identified as Woking, Camberley, Farnham and Farnborough.

3.2 In this section we review the parking supply and policies of these local competing centres as well as benchmark Guildford's parking supply against them in terms car park spaces per retail and business floor-space.

Competing Centres

Kingston-upon-Thames

3.3 Kingston-upon-Thames is located within Greater London, close to the border with Surrey, and lies approximately 20 miles to the north east of Guildford. The London Borough of Kingston-upon-Thames has a population of approximately 160,000 (2011 Census). Kingston-upon-Thames had higher retail expenditure in 2010, at £810 million compared to £600 million in Guildford[2].

3.4 Kingston is a major shopping destination for south west London, with two large shopping centres located within the town centre: Bentall Centre and Eden Walk as well as a large John Lewis.

3.5 Though public transport accessibility is high, parking provision is very generous. The town centre has a Public Transport Accessibility Level (PTAL) score of 6, but parking levels are more in keeping with a town centre with poor public transport accessibility and a of PTAL 1 or 2. This is partly explained by the poorer accessibility of areas to the south and west of the town centre. There are a large number of off-street car parks available within the town centre, with a total of 6,834 spaces, of which six are multi-storey and a further two are a combination of surface and multi-storey parking. The largest car park is the Bentall Centre car park, which has nearly 2,000 parking spaces across three sites for its visitors. Three of the multi-storey car parks (The Rose, Cattle Market and The Bittoms) are council operated. Others are operated by the Bentall Centre and the Eden Walk shopping centre, with NCP operating the Fairfield multi-storey car park.

3.6 At the council-operated car parks, charges are typically £1.40 for the first hour, increasing by £0.70 for every additional 30 minutes of parking. At the Bentall Centre and Eden Walk parking is also typically £1.40 per hour. NCP operates two

[2] Source: CACI Retail Footprint 2010 Annual Ranking. http://www.caci.co.uk/492.aspx last accessed online 17th June 2013.

car parks in the town: an hour's parking at Fairfield costs £1.30 whilst an equivalent stay at St James's Road costs £1.50.

3.7 The town centre lies within a Controlled Parking Zone operating seven days a week between 8.30am and 10.30pm, with Pay & Display charges of £2.00 for one hour and 50p for 15 minutes.

3.8 Kingston has one main railway station (Kingston) located in the town centre, and a number of other stations close by (Norbiton, Hampton Wick, Surbiton). Currently eight trains per hour serve the station, six of which go to Waterloo, with the remainder to Shepperton. Surbiton, a short and frequent bus ride away, has a much higher frequency (and faster) service to London, with six trains per hour in the off-peak. Kingston is well served by buses connecting the centre with Heathrow, Richmond, Ealing, Surbiton, Tolworth and Chessington, as well as longer distance services to Dorking, Woking, Chertsey and Guildford.

Basingstoke

3.9 Basingstoke is located in North East Hampshire, approximately 25 miles from Guildford. The town has a population of 83,000, making it larger than Guildford in terms of the number of inhabitants. Retail expenditure in the town in 2010 was estimated at £360 million, 60% of the expenditure for Guildford, in spite of the town having a larger population.

3.10 The town centre area is dominated by Festival Place, the central retail development that was opened in 2002. There are two other areas within the town centre (The Malls and the Top of Town) that house a number of retail outlets, but have seen popularity decline since the opening of Festival Place.

3.11 Reflecting the importance of Festival Place to the town centre as a whole is the fact that Festival Place provides around 60% of the total car parking provision in the town centre, at approximately 2,500 spaces. In addition there are a number of council operated car parks in the town centre, in which there are nearly 1,500 long stay spaces and 500 short stay spaces.

3.12 Parking charges at the short stay car parks start at £0.50 for 30 minutes up to £2.10 for two to three hours maximum. Charges at long stay car parks are slightly higher at the larger, more heavily used car parks, though the difference is negligible. Festival Place car parking is slightly more expensive than the council run car parks up to a stay of six hours (£5.50 compared to £4.90 and £5.20), but beyond that amount of time the cost can rise to £15.00, whereas charges are capped at six hour charge in council car parks.

3.13 Customers are able to enjoy discounted all day car parking if they use a pre-pay card. The "Parking Card" costs £85.00, which is a £5.00 deposit and £80.00 of parking credit, which can then be topped up. Typically a customer using the Parking Card can save approximately 15% on their parking costs.

3.14 There is also a Park & Ride facility in the town. The Centre Shuttle operates between West Ham leisure centre to the west of the town centre, and Festival Place and the railway station, with a journey time of under ten minutes. The buses run seven days a week, every 15 minutes between 7:00am (10:00am on Sunday) and 11:00pm. The cost of using the service is currently £2.00 return, with weekly and monthly passes available.

3.15 Basingstoke Station has a frequent service to London Waterloo and the South Coast due to its position on the South Western and West of England Main lines. Currently there are seven trains an hour between Basingstoke and Waterloo, with a journey time of just over 45 minutes on fast services. Westbound services operate to Portsmouth, Southampton, Bournemouth, Weymouth, Salisbury and Exeter. There is also a half hourly shuttle service between Basingstoke and Reading, which is supplemented by hourly Cross-Country services between Bournemouth and Manchester that call at both stations. Basingstoke is connected by direct rail services to many of the competing centres, including Farnborough, Woking, Southampton, Portsmouth and Reading.

3.16 In addition to the railway station, a large number of bus services are in operation in Basingstoke. These bus services serve nearby towns and cities such as Alton, Andover and Camberley, and Winchester.

Reading

3.17 Reading is located approximately 30 miles north west of Guildford. Reading has a population of approximately 156,000 (2011 Census), over twice the population of Guildford.

3.18 Reading is a major retail centre for the South East, with the town repeatedly named as the best retail town in the region in the UK retail rankings. It also has the highest retail expenditure in 2010 for competing centres, at £960 million. This compares with £600 million for Guildford in the same period.

3.19 The main shopping centre in Reading is the Oracle, which has a total retail floor space of 76,000 square metres. This is supplemented by the Broad Street Mall and a number of large retailers situated along Broad Street which runs through the town centre and is pedestrianised.

3.20 The majority of car parks in Reading are operated by NCP. These include a number of multi-storey car parks as well as surface car parks. The six NCP car parks provide a total of just under 3,000 car parking spaces across the town centre. Parking charges vary significantly by car park, with some operating a two hour charge (and then a flat charge beyond two hours) whereas others offer hourly rates. Daily rates range from £7.00 to £17.00 in these car parks.

3.21 In addition to the NCP car parks, The Oracle shopping centre has two car parks, the Holy Brook car park which has 623 spaces, and the Riverside multi-storey car park, which has 1,679 spaces. Charges are £1.50 per hour up to four hours and up to £20 for a 24 hour stay. There is also a car park at Chatham Place which is operated by Q-Park, has a total of 590 spaces and charges £1.40 an hour.

3.22 Supplementing the town centre car parks is the car park at Reading Station, which has capacity for 1,620 cars, with charges of £4.70 for one hour, up to £20.20 for a day.

3.23 In total, there are just under 7,300 car parking spaces within Reading town centre. Parking charges across the town are typically higher than in the other competing centres.

3.24 As well as the parking provision within the town centre, Reading also has a Park & Ride scheme in operation. There are two Park & Ride sites in the town, one at the Madejski Stadium close to the M4 motorway, and one at Loddon Bridge, located just off the A329(M) at Winnersh. The Madejski Park & Ride has 1,800 spaces and takes 10 minutes to central Reading and 15 minutes to Reading Station, and costs £3.00 return. The service operates between 6.30am and 8.30pm and runs every 20 minutes during the day, increasing to every five to ten minutes during peak hours. The Loddon Bridge Park & Ride has 500 spaces and takes slightly longer, 15 minutes to central Reading and 20 minutes to Reading Station, and is slightly more expensive (£4.20 return, but £3.20 after 9.30am) and runs slightly less frequently (every 12 to 15 minutes, between 6.30am and 6.30pm).

3.25 Reading is a key station on the Great Western Main Line into London Paddington and as such enjoys a high frequency rail service. All fast services between London and Bristol, South Wales, the West of England and the Cotswolds call at Reading, with a journey time between Reading and Paddington of 25 to 30 minutes. There are also local services to Newbury, Basingstoke, Oxford, Guildford and Gatwick Airport, as well as a stopping service to London Waterloo, and cross country services to Birmingham, Manchester and Newcastle.

Bracknell

3.26 Bracknell is located in Berkshire, approximately 20 miles north west of Guildford. It has a population of just under 53,000, making it about 75% of the size of Guildford in terms of the number of inhabitants. It is situated at the end of the A329(M) motorway, between the M4 and M3 corridors.

3.27 There are two multi-storey and three surface car parks. The two multi-storey car parks (Charles Square and High Street) are both 24 hour car parks and provide a total of 1,750 parking spaces, with a further 360 spaces provided in short stay, surface car parks.

3.28 Car parking charges at the multi-storey car parks start at £1.10 for up to an hour's parking, increasing to £6.00 for stays over six hours, with charges at £1.20 for Sunday and overnight parking. One of the surface car parks is also 24 hour, and is slightly less expensive, with a maximum rate of £5 for stays of over eight hours, and £1.00 on Sundays. The remaining car parks are short-stay, up to four hours parking, with a four hour stay costing £1.60, with Sunday parking £1.20.

3.29 One of the key ambitions of the Council is to promote modal shift from car to other forms of more sustainable transport to access the town. As such the Borough Council has adopted more rigorous parking standards for the town centre.

3.30 Bracknell is a popular commuter town, as it lies on the railway line between Reading and London Waterloo. There is a half hourly service between the two stations, with the journey to Reading approximately 20 minutes, and the journey to Waterloo taking just over an hour. There are a number of bus services in the town, including a service every 20 minutes to Wokingham and Reading, and a half hourly service to Camberley.

Woking

3.31 The town of Woking , located six miles to the north east of Guildford and is the closest of all the competing centres, and is very similar in terms of population, with a total of 63,000 residents in the town.

3.32 There are two major shopping centres in Woking; The Peacocks and Wolsey Place, which attract approximately 170,000 shoppers per week. The Peacocks has recently completed a redevelopment programme, and a similar exercise is underway at Wolsey Court as part of the regeneration of Woking Town Centre and the integration of the two shopping centres.

3.33 Currently Woking Borough Council provides a total of 3,700 car parking spaces across three main car parks in addition to the designated station car park.

3.34 The main car park in Woking is the Shoppers car park in the north west section of the town centre in Woking, which has 2,276 spaces. There are two further multi-storey car parks in the town centre, at Heathside Crescent and Victoria Way. Heathside Crescent is located south of Woking station, and has 496 spaces. Victoria Way is located in the north east of the town centre, with a total of 932 spaces. In addition to the existing car parks, there is another town centre car park at Brewers Road which is currently closed for redevelopment is due to re-open in 2013.

3.35 These three car parks all currently charge £1.20 per hour for up to four hours, rising to a maximum charge of £9.00.

3.36 In addition to these three multi-storey car parks in Woking town centre, there is a 570 space car park at Woking Station operated by South West Trains. Charges are £10.00 during the weekday morning peak, £4.00 after 11:00am Monday to Friday, and £3.00 on Saturday, Sunday and on Bank Holidays.

3.37 Woking enjoys a more frequent rail service than Guildford, with 14 trains per hour between Woking and London Waterloo, compared with eight trains per hour for Guildford. This reflects the fact that Guildford is on the Portsmouth Direct Line and not the South Western Main Line. Woking is also connected to a number of the competing centres by direct rail services, including Basingstoke, Farnborough, Farnham, Southampton and Portsmouth.

Camberley

3.38 Camberley has a population of just over 30,000 and lies on the border of Surrey, Hampshire and Berkshire. It lies less than 10 miles from both Farnborough and Bracknell, and 15 miles from Guildford.

3.39 The major shopping centre is the Mall, with nearly 100 stores. There is also the Atrium Centre, which has 25 shops, restaurants and amenities in the town centre, including a cinema and theatre. Retail expenditure in Camberley in 2010 was estimated at around 30% of Guildford expenditure levels (£170 million).

3.40 There are three primary car parks in Camberley; Main Square (1,025 spaces), The Atrium (683 spaces) and Knoll Road (630 spaces). In total, there are approximately 2,500 car parking spaces in the town centre.

3.41 Car parking charges vary across the town centres, from £1.00 to £1.60 for two hours, with most maximum charges set at £4.00, except the Mall at £6.50 for up to ten hours.

3.42 There is a Controlled Parking Zone around the town centre. The hours of control are 8.00 am to 6.00 pm Monday to Saturday. Within the Controlled Parking Zone, parking (where permitted) is either unlimited or subject to a maximum of either two hours or 30 minutes stay as shown by signs on the street. All parking remains free of charge, although Surrey County Council has announced that charging for on-street parking is being considered.

3.43 Camberley Station, in the centre of the town, is on the Ascot-Guildford railway line, with trains operating every 30 minutes during the week. Through services to London Waterloo run during peak hours.

Farnham

3.44 Farnham has a population of around 38,000, just over half of the total Guildford population.

3.45 Farnham is a market town, with shops focused on three main roads in the town centre. In contrast to the other competing centres, Farnham has a large number of independent retailers (as well as national retailers) and has no indoor shopping centre.

3.46 There are nine car parks in Farnham, providing just under 1,800 car parking spaces. There are no multi-storey facilities in the town, and the car parking provision is distributed relatively evenly across the nine car parks.

3.47 There are significant variations in parking charges across the nine car parks. The main central car park, with charges starting at £0.80 for the first hour, up to a maximum charge of £10.80. In contrast, some of the other car parks in the town centre charge £0.50 or £0.60 for the first hour, up to a maximum of £5.50.

3.48 Farnham lies on the London Waterloo-Alton line, with two trains per hour in each direction. The journey to London is just under an hour. There are also a number of local buses, the majority of which are between Farnham and Aldershot. There are seven buses an hour between the two towns, with some of these services continuing to Haslemere, Alton and Guildford.

Farnborough

3.49 Farnborough is located in north east Hampshire, close to the neighbouring towns of Camberley and Aldershot, approximately 12 miles from Guildford. The population is approximately 57,000, about 10,000 lower than Guildford. Many villages around the town have been gradually integrated into suburbs of the town.

3.50 There is one main shopping centre in Farnborough which is split into three areas – Kingsmead, Queensmead and Princesmead. Currently Kingsmead and Queensmead are being redeveloped in order to create one large shopping area in the town centre (called the Meads). There are also two large retail parks on the outskirts of the town.

3.51 Car parking charges are reasonably uniform across all the car parks in the town centre. At the principal car parks serving the three main shopping areas parking is approximately £0.60 per hour, with a fixed fee of £5.00 for stays longer than three hours. At other car parks this fixed charge for longer than three hours is set at £3.60.

3.52 Farnborough railway station is on the South Western Main Line between London Waterloo and Southampton. There are also two other stations (Farnborough North and North Camp which are on the North Downs Line between Reading and Guildford. The A325 runs through the town centre, and the town is located close to Junction 4 and Junction 4a of the M3.

3.53 There are a number of plans by the borough council to develop Farnborough town centre. The plans propose a total investment of £250 million in the town centre over the next 10 years, to improve the Queensmead area and the urban realm within the town centre. As part of these plans, more than 17,000 square metres of new retail space, new businesses, a hotel and leisure space, and new homes are proposed. As part of these proposals the council indicated that improvements to town centre car parking are at the forefront of these proposals.

Crawley

3.54 Crawley is located in West Sussex, approximately 25 miles to the south east of Guildford. It is situated in the vicinity of Gatwick Airport. The town’s population is larger than Guildford’s at just over 105,000.

3.55 Historically a market town, Crawley has operated as a major retail centre for the region for many decades. In 2010 retail expenditure in the town totalled £390m, approximately 65% of the equivalent for Guildford. The town centre is dominated by the 41,800 square metre County Mall retail centre. In addition there are a number of retail outlets on Queens Square, which is a large pedestrianized area in the town centre. There is also a large industrial and business park (Manor Royal) on the outskirts of the town, towards Gatwick.

3.56 There are a number of car parks within the town centre, including four multi-storey car parks. In total, there are nearly 4,000 car parking spaces provided within the town centre. The largest car park is the County Mall multi-storey car park, which has 1,739 spaces. Two of the car parks, the Town Hall multi-storey (558 spaces) and the Orchard Street multi-storey (494 spaces) are operated by Crawley Borough Council; the remainder are operated by NCP.

3.57 For the council owned car parks, parking charges start at £2.20 for three hours, rising to £5.00 for ten hours, with a number of season tickets available at both. At County Mall, short-stay parking is more expensive (£2.50 for up to two hours), but is equivalent for longer stays (£5.00 for four to 24 hours). At the NCP car parks, short-stay car parking is typically around £2.00 to £3.00 for two hours, but the price of long-stay car parking varies considerably. For example, all-day parking at Boulevard East / West would cost £15.00, compared with £3.00 for Kilnmead.

3.58 There are two railway stations that serve Crawley, Crawley Station and Three Bridges Station. Crawley station is located in the town centre and is served by trains from London Victoria and London Bridge towards Horsham (both a half hourly service). Three Bridges is to the east of the town centre and lies on the Brighton Main Line, with four trains per hour on the Thameslink route between Bedford and Brighton, and a further four trains per hour between London and Horsham.

3.59 There are also three guided bus routes (entitled Fastway) that serve Crawley and Gatwick Airport. These operate at a high frequency across the day, with one route (Route 10 between Bewbush and Gatwick) operating 24 hours.

Portsmouth

3.60 Portsmouth is the second largest city in Hampshire, after Southampton, and is located approximately 45 miles from Guildford. The population of the city is just over 200,000, having approximately three times the size of population of Guildford.

3.61 City centre retail has changed somewhat in the last decade, with the development of Gunwharf Quays, a designer shopping outlet centre close to the city harbour. Previously retail development had solely focused on the city centre, in particular at the Cascades shopping centre and Commercial Road. The city centre has a total retail floor-space of approximately 94,000 square metres and Gunwharf Quays comprises a further 52,000 square metres. Whilst no information on overall city centre retail expenditure is available, Gunwharf Quays alone generated £280 million in expenditure in 2010.

3.62 Currently Portsmouth City Council administers a total of 2,500 parking spaces across the city centre. In addition to the council-run car parks are the car parks at Cascades and Gunwharf Quays, which combined bring the total parking provision in Portsmouth to just under 5,000 spaces.

3.63 Car parking at Gunwharf Quays starts at £2.90 for two hours, rising to £8.00 for five to seven hours, and £20.00 for over ten hours. Parking in the city centre is slightly cheaper, with typical parking charges at £1.60 for one hour, £2.60 for two hours, up to £10.00 for all day parking. The car park at the Cascades shopping centre is cheaper for shorter stay parking (£1.00 per hour up to five hours), with a £10.00 fee for a stay of five to twelve hours.

3.64 There is also a Park & Ride facility in Portsmouth, but it is only operational on Saturdays. The car park is located to the north of the city, close to the junction of the M27 and M275. The service stops at two city centre locations, one for the central shopping area, and one for Gunwharf Quays and the Spinnaker Tower. Buses operate between 9:00am and 6:00pm and run every ten minutes. Charges are on a per car, rather than a per passenger basis. Car parking costs £2.50 per car, and then the bus driver will issue a ticket to each passenger upon presentation of a valid car parking ticket.

3.65 There are several stations that serve the city, the two key stations being Portsmouth Station and Southsea Station, which serve the city centre; and Portsmouth Harbour which serves Gunwharf Quays and Portsmouth Docks. Three train operators run services out of these stations; First Great Western, Southern, and South West Trains. South West Trains is the main provider, operating two fast services (journey time 90 minutes) and one local service per hour to London Waterloo, together with an hourly service to Southampton. There is also an hourly Southern service to London Victoria (journey time two hours), as well as hourly First Great Western services to Cardiff via Southampton and Bristol.

Southampton

3.66 Southampton is the largest city in the county of Hampshire, and is approximately 50 miles from Guildford. The number of inhabitants within the city is just under 240,000 (2011 Census), making it the largest of the competitive centres considered in this report, at nearly four times the number of inhabitants in Guildford. Retail expenditure in 2010 was estimated at £800 million, around a third higher than Guildford.

3.67 Southampton city centre has been dominated since 2000 by the WestQuay shopping centre, which comprises 74,000 square metres of retail floor space, of over 100 stores. Other retail areas in the city centre include Marlands and the Bargate centre. Future development is likely to be focused to the south of the city centre, closer towards the sea front.

3.68 In total there are just over 4,800 car parking spaces which are operated by the city council, and a further 4,000 spaces as part of the West Quay complex.

3.69 Many of the city centre car parks fall into two tariff categories; long stay and short stay. In the long stay car parks, charges start from £1.20 per hour for the first two hours, rising to £8.00 for ten hours. The multi-storey car parks also charge £1.00 per hour (to a maximum of £3.00) after 6:00pm. The short stay car parks allow a maximum stay of two hours, with a charge of £0.70 for every 30 minutes. West Quay, Marlands and West Park all charge slightly different rates to the standard town centre rates. West Park charges the same as the standard long stay tariff up to ten hours, but continues to £11.00 for parking up to 14 hours. Marlands set slightly cheaper rates to the standard, at £1.00 per hour, up to £4.50 for seven hours, plus the standard evening rates. West Quay Podium charges higher rates, at £2.40 for two hours parking, up to £11.00 for seven hours, but the multi-storey is cheaper, averaging £1.00 per hour up to four hours and £5.00 for longer stays.

3.70 There are a number of special parking charges designed to encourage demand and footfall. There is a special parking fee of £5.00 for the Marlands car park if staying more than seven hours but leaving before 6:00pm. The council have also developed a pre-payment “Pay as you Park” card for three of the standard long stay tariff multi storey car parks, which give a 20% discount on parking charges at those car parks.

3.71 Policy statements relating to city centre parking within the Southampton Local development Framework Core Strategy for the city emphasize the need to maintain value for money for car parking, whilst incentivising people to consider the use of other modes. In particular the focus of the city centre strategy should be on peak commuter journeys rather than off-peak leisure journeys.

3.72 The Core Strategy also outlines the potential for a Park & Ride scheme that would best serve long term parking demand in the city, in particular looking at employer-led Park & Ride services that could potentially be used for general use on weekends.

3.73 There is a high level of public transport provision in the city. Buses provide the majority of public transport in the city, with a number of operations running services, including First and Stagecoach. There is a half hourly express service between Southampton and Portsmouth, and high frequency buses serving nearby towns, including Fareham, Totton, and Hedge End. There is also a number of services (Unilink) financed by the University of Southampton which serve the university, the city centre, the railway station, and Southampton Airport, and a free shuttle bus between the railway station and West Quay that operates every 15 minutes.

3.74 In addition to the bus services, there are four train operators (South West Trains, Southern, First Great Western, and CrossCountry) that operate trains that call at Southampton Central station. There are three services per hour between London Waterloo and Southampton that continue onto Bournemouth, Poole and Weymouth. In addition there are two services an hour to Portsmouth, and hourly services to Salisbury, Brighton, London Victoria, Reading, Birmingham and Manchester.

Retail and Business Floor-space Indicators

3.75 Because of the varying size of the local competing town's commercial offers, to understand Guildford's parking supply in comparison, the simplest method is to look at the 'parking density' of each centre. That is the number of publicly available parking spaces by town centre retail and business floor space. Table 3.1 below shows the retail and business floor space in the town centres of the competing centres along with total publicly available parking spaces. This is further broken down where possible by short and long stay, with short stay density by retail floor-space and long stay density by business floor space.

3.76 The 2010 Cushman and Wakefield Town Centre Development Study tabulated the commercial floor space in a number of competing centres, and those data are reproduced here. Portsmouth and Southampton were not included in the Town Centre Development Study and so data from the Office of National Statistics rateable floor space has been collected and recorded below.

TABLE 3.1 PARKING SUPPLY BY COMMERCIAL FLOOR-SPACE

Centre	Retail Floor-space (m^2)	Business Floor-space (m^2)	Total Commercial (m^2)	Public Parking Spaces (Saturday)				Total Town Centre Parking per $1000m^2$					
				Short Stay	Long stay	Other Public	Total Town Centre Spaces	Park and Ride	Long Stay & Park and Ride	Short Stay per Retail	Total per Retail	Long Stay per Business	Long Stay & Park and Ride per Business
Guildford	**120**	**102**	**222**	**3180**	**1939**	**0**	**5119**	**2040**	**3979**	**27**	**43**	**19**	**39**
Kingston upon Thames	130	125	255	No distinction advertised		0	**6834**	0	No distinction advertised		**53**	No distinction advertised	
Basingstoke	107	163	270	3000	1500	0	**4500**	0	1500	28	**42**	9	10
Reading	170	362	532	No distinction advertised		0	**7300**	2300	No distinction advertised		**43**	No distinction advertised	
Bracknell	51	97	148	360	1750	0	**2110**	0	1750	7	**41**	18	19
Woking	70	147	217	No distinction advertised		0	**3704**	0	No distinction advertised		**53**	No distinction advertised	
Camberley	57	23	80	No distinction advertised		0	**2500**	0	No distinction advertised		**44**	No distinction advertised	
Farnham	39	47	86	No distinction advertised		0	**1800**	0	No distinction advertised		**46**	No distinction advertised	
Farnborough	15	42	57	2369	512	0	**2881**	0	512	158	**192**	na	na
Crawley	123	129	252	2260	1739	0	**3999**	0	1739	18	**33**	13	14
Southampton	229	142	371	470	4352	4000	**8822**	0	4352	2	**39**	31	31
Portsmouth	143	108	251	No distinction advertised		0	**5000**	0	No distinction advertised		**35**	No distinction advertised	

Source: Retail & commercial floor-space: Town Centre Development Study. Cushman and Wakefield 2010. ONS Neighbourhood Statistics

Parking Density

3.77 Guildford offers a total of 43 spaces (short- and long-stay) for every 1,000 square metres of retail development in the town centre. This is equivalent to the average of 43 spaces across the competing centres (removing the anomalous parking levels in Farnborough). Kingston-upon-Thames and Woking offer a generous 53 parking spaces per 1,000 square metres of development. There is less definition in competing towns to short and long stay parking, however if short stay parking density is looked at then Guildford offers 27 short stay spaces for every 1,000 square metres of retail floor space in the town centre on a Saturday (24 spaces per 1,000 square metres during the week). The nearest comparison is Basingstoke which has a similar offer of 28 short stay spaces per 1,000 square metres of retail and a similar 42 total spaces per 1,000 square metres of retail floor space.

3.78 In terms of providing for local commuters, Guildford again provides a generous 19 long stay town centre spaces per 1,000 square metres, rising to 39 spaces if the Park and Ride sites are included.

4 Local Transport Conditions

Public Transport Supply

Rail

4.1 Guildford Station is located in the centre of the town and is operated and managed by South West Trains, who operate most of the services that serve the station. Services are also operated by First Great Western, Southern, and Cross Country. The vast majority of services from Guildford either originate or terminate at London Waterloo. In the peaks there are eight services per hour between Guildford and London Waterloo, of which four are fast services, calling at Woking only or Woking and Clapham Junction. The journey time to Waterloo on fast services is between 35 and 40 minutes, increasing to between one hour and 75 minutes on local stopping services. This compares favourably with many of the competing centres, which have fewer services into London (all except Woking and Reading) and slower journey times.

4.2 In addition to services to Waterloo, there are peak time Southern services to London Victoria and London Bridge via Epsom and West Croydon, and a single Cross Country service per day to Newcastle. Great Western services link Guildford with Reading, Dorking and Gatwick Airport.

4.3 Of the competing centres, only Woking, Farnborough and Farnham are within a 30 minute train journey. The journey time by train to each of the competitive centres are displayed in Table 4.1 below.

TABLE 4.1 RAIL JOURNEY TIMES TO COMPETING CENTRES

Competing Centre	Rail journey time from Guildford
Woking	8 minutes
Farnborough	25 minutes (11 minutes to North Camp)
Farnham	27 minutes
Basingstoke	33 minutes
Reading	34 minutes
Camberley	44 minutes
Bracknell	52 minutes
Portsmouth	1 hour
Crawley	1 hour 6 minutes
Kingston-upon-Thames	1 hour 10 minutes
Southampton	1 hour 16 minutes

Bus Services

4.4 Guildford is a regional public transport hub with a large number of local and regional bus services drawing in workers, shoppers, and visitors from the surrounding area to the town centre and rail station. The majority of bus services are operated by Arriva, but Stagecoach, Abellio, as well as a number of small local companies have a small number of services that serve the town.

4.5 There are circular bus routes which operate across a number of the suburbs and villages surrounding to Guildford, including Charlotteville, Fairlands, Woodbridge Hill, Stoughton, Abbotswood and Merrow. Many of these services provide links with key amenities in the town, including the Royal Surrey County Hospital, the University of Surrey, and Guildford Research Park.

4.6 The main destination outside of the town that is served by local buses is Woking. A combination of three services provide a total of five buses per hour between the two towns. The fastest of these services (34/35 which run half hourly) takes approximately 35 minutes, with the slowest taking nearly an hour.

4.7 Other frequently served local destinations include Cranleigh (five services per hour, with journey times varying between 25 and 45 minutes), Godalming (six services per hour, with journey times between 15 and 25 minutes) and Aldershot (five services per hour, journey time 40 minutes).

4.8 A number of larger towns are also served by Guildford buses, routes on which there is typically one service per hour, including Camberley, Dorking, Epsom, Farnham, Kingston-upon-Thames, and Redhill.

Interchange with the Railway Station

4.9 All buses that serve Guildford town centre run out of the Friary Bus Station. The bus station and railway are currently located approximately 500 metres apart, making fast interchange between the two modes difficult, unless the bus service stops at the railway stations.

Park & Ride

4.10 There are three Park & Ride sites located across Guildford, which are situated at the following locations:

- Spectrum Leisure Centre: GL100 buses run from the north of the town centre. The car park is located close to the A3 and A25. The service uses the main site car park, which was expanded by 270 spaces to increase capacity at the site.
- Artington: GL200 buses run from the south of the town centre. The 720 space car park is located on the A3100 towards Godalming.
- Merrow: GL300 buses run from the east of the town centre. The 335 space car park is located on the A25, on the Epsom Road towards Leatherhead.
- Onslow: new location to the west of the town centre. The 550 space car park is located adjacent to the A3 within the University of Surrey's Manor Park development. The site is planned to open in late 2013 following the tendering of bus services to operators.

4.11 GL100 and GL200 services are run by Arriva, and GL300 services are run by Safeguard Buses. Parking is free at all three Park & Ride sites, with passengers paying the fare on the bus. The cost of a return is highest on GL100 services (£2.40), with a return costing £2.20 on GL200 and £1.80 on GL300. Weekly and monthly passes are available to buy on-board and at the Friary Bus Station.

4.12 The Spectrum GL100 service operates a longer service than the other two Park & Ride shuttles Monday to Friday, with operating hours between 7:30am and 11.15pm. It also operates a reduced service on Saturdays, Sundays and bank holidays. The GL200 and GL300 services operate Monday to Saturday, but with shorter operating hours (typically between 7:30am and 7:30pm).

4.13 Journey times into the town centres are approximately seven to eight minutes on both the GL100 and GL200, with the time varying between twelve and 20 minutes on the GL300. This is due to the stopping pattern of the GL300, which calls at intermediate stops en route, which neither of the other two services do.

4.14 Service frequency between 7:30am and 7:30pm is every ten to twelve minutes on both the GL100 and GL200, and every 15 minutes on the GL300.

Coach

4.15 Currently National Express operate the 030 service between London Victoria coach station and Portsmouth and Fareham which calls at Guildford Park Barn. The service operates approximately every two hours.

4.16 There are coach parking bays provided across the town for tourist coaches, including two on Bedford Road, four at Guildford Park Road car park and two at Artington Park & Ride.

Summary

4.17 Guildford has excellent rail services to the capital, as well as a number of cross-county services to Dorking, Gatwick Airport and Reading. The town centre and station are also well served by bus services, drawing in customers from the surrounding towns and villages, as well as farther afield to Kingston-upon-Thames, Redhill, Dorking, Camberley, and Epsom. For those who are less well served by bus routes, the Park & Ride sites offer the chance to park the car on the edge of town and ride the bus into the centre with a high frequency and relatively short journey times. Clearly there are opportunities, particularly for the local workforce to be less reliant on access by car to the town centre and to take advantage of its excellent public transport links.

Traffic Management

4.18 Surrey County Council, as the Local Highway Authority, have responsibility for the main roads in and around Guildford, except the A3. The county council's highways department was asked to provide commentary on the local traffic management issues in the town. Their feedback on the strengths and weaknesses of the local network is recorded here.

Principal Road Network

4.19 The A3 is the principal trunk road in the borough and maintained by the Highways Agency. It links Portsmouth on the south coast to London and runs diagonally through the borough from the south west to the north east, just to the north west of Guildford town centre, adjacent to the University of Surrey and the Surrey Research Park. It is a dual-carriageway road throughout the length of the borough.

4.20 The A31 starts at the gyratory in Guildford town centre and heads west as a single carriageway with one lane in each direction. At the junction with the A3, it is a dual carriageway with two lanes in each direction, and the junction is commonly known as the Hogs Back. The road links Guildford with Farnham town further to the west. Past Farnham, the A31 leads to the M3 and south west to Southampton. Surrey County Council maintains the A31.

4.21 Other main roads within the borough are the A323, A324, A322, A320, A25, A248, A3100, A281, and A246.

Strategic Issues

4.22 The A3 is a high quality trunk road, which functions well most of the time, especially for through traffic. However, it operates at more than 90% capacity during peak periods, which results in congestion and delays if incidents occur at any point in the network due to flow breakdowns. At peak times there are incidents of queuing at the junction with the A31 and on the section adjacent to the Surrey Research Park and University of Surrey due to the nature of the area adjacent which has many businesses including the University of Surrey, The Royal Surrey Hospital, a Tesco superstore, Surrey Research Park and a residential area. The section of A3 through the town is also used as a bypass for traffic that junction hop which adds to congestion. Other traffic management issues on the A3 include:

- Incidents on the A3 to the north of Guildford cause rat-running in the villages around Ripley.
- Congestion on the local network adjoining the research park, Royal Surrey County Hospital and University of Surrey are exacerbated by the severance of the A3.
- The traffic noise on the A3 disturbs the Area of Outstanding Natural Beauty tranquillity to the south of Guildford town.
- Poor local accessibility between the Westborough/Park Barn area and local centres of employment are exacerbated by the severance effect of the A3.

Guildford Town Centre Road Network

4.23 There is a one-way three-lane gyratory system around the town centre straddling the River Wey. The A3 is the main strategic road just to the northwest of the town centre.

4.24 There are four A-Roads that meet at the gyratory in the town centre: The A3100 and the A281 from the southerly direction, the A31 from the Westerly direction and the A322 from a northerly direction.

4.25 The pedestrian permeability is compromised by the narrow footpaths which have a negative impact in particular on the night time economy and inadequate facilities for cyclists and the disabled.

Guildford Town Centre Traffic Issues

4.26 The local topography of Guildford is hilly to the east and the west with a narrow gap in between where the River Wey flows through. The main railway line runs in a north-south direction along the gap adjacent to the river. There are two bridges taking traffic across the river in the town centre; Friary Bridge and Bridge Street. Both of these form part of the one-way three-lane clockwise gyratory. The historic fabric of the town limits the scope of the interventions that can be implemented to mitigate transport problems while the hilly terrain and the Conservation Areas within the town centre limit the scope for providing adequate cycling facilities including cycle stands and paths and also facilities for the disabled.

4.27 Other town centre accessibility issues include:

- widespread peak period traffic congestion in Guildford town centre, exacerbated by severance from the railway, the River Wey and the gyratory system;
- widespread peak period traffic congestion resulting from incidents, accidents and congestion on the A3 and A31;
- congestion along the A320 adjoining the Slyfield industrial estate;
- congestion at the Dennis Roundabout;
- issues of cross town journeys through the town rather than using the strategic highway network;
- the one-way gyratory system affords priority to the private car to the disadvantage of more sustainable transport modes;
- the bus station is in need of revitalisation;
- there is poor accessibility between the rail station, bus station, town centre, and Surrey Research Park / University of Surrey and Guildford business estates exacerbated by severance by the railway, River Wey and the gyratory system;
- the functionality of the main train station needs improving (i.e. entrance / exit, waiting rooms, movement between the two sides and the platforms);
- inadequate town centre signing making it difficult to find key locations;
- the existing footbridge over the A3 and A25 by the Wooden Bridge is a major deterrent to cycling and walking between the town centre and Stoughton; and
- three of Guildford's wards were in the top thirty for rate of traffic accidents as recorded in the 2010 Indices of Multiple Deprivation[3]:
  - (21st) Worplesdon – primary roads: A322 and A323;
  - (23rd) Friary and St Nicolas – primary roads: A31, A3100 and A322; and
  - (28th) Stoke – primary roads: A3 and A320.

Summary

4.28 While Guildford enjoys strong public transport links, the local topography and road layout and local car based travel patterns combine to cause widespread peak period congestion through the town. There are also issues with pedestrian permeability into and through the town centre. As the town's retail and commercial offer increases through additional development and more organic growth, there will be an associated increase in demand for transport to and from

[3] Source: Indices of Multiple Deprivation 2010: ID 2010 Road Traffic Accident Indicator. http://www.data4nr.net/resources/view-all-imd-datasets/1477/. Last accessed online 17th June 2013.

the town centre. With car based travel the dominant mode, car based trips will increase, with an associated increase in demand for parking. Future car park provision combined with demand management policies will need to carefully balanced to support the local economy. Appropriate traffic mitigation measures and well considered parking policies are seen as an important mechanism for helping to ensure sustainable economic development and support more sustainable transport options.

5 Future Parking Supply and Demand

Proposed Developments

5.1 Guildford is the principal shopping centre in Surrey, however, the last major retail development was over 20 years ago, while other competing centres such as Kingston-Upon-Thames, Reading, and Basingstoke have expanded their retail offer and ability to attract shoppers. In the face of growing competition from other local centres, recent retail studies for the borough have concluded the need to expand Guildford's retail offer and there are strategic objectives and policy commitment from the Council to support new development in the town centre to maintain and improve its retailing role in the region. There are a number of key developments either in the pipeline or with planning permission that therefore need to be considered when looking at the future parking needs of the town in the next 20 years.

5.2 **The Friary Shopping Centre:** Planning permission has been granted in 2004, 2007 and 2010 for an extension to the Friary shopping centre including between 22,500 square metres and almost 25,000 square metres (gross) of retail floor-space (the remainder being food and drink uses). As part of the wider economic development of the town centre, the Council has initiated the selection of a development partner to bring about the comprehensive development of the North Street area. Shortly the Council will conclude this process followed by the formulation of a masterplan for the site and the surrounding area. A mixed use, retail led development of between 30,000 and 45,000 sq.m of new floorspace will be built by 2020/2021.

5.3 The larger proposal would see the redevelopment of the Leapale Road multi-storey, North Street, Commercial Road and Old Police Station car parks, with a potential loss of 559 spaces. Inevitably any scheme will include new car parking, potentially within the development site.

5.4 **Bellerby Theatre and North Place:** The sites are in the process of being purchased by Waitrose as a site for a 3,000 square metres supermarket (net sales space of 1,951 square metres) with a car park, subject to planning permission. Proposals would involve the loss of the existing Pay and Display and contract parking, 71 spaces, and the addition of a 168 space car park serving the supermarket.

5.5 **Guildford Station:** The station and surrounding area is allocated in the Local Plan for mixed use including retail and leisure, whilst adjacent land on the other side of the river at Bedford Road detailed below is allocated for one or a mix of uses that include retail.

5.6 **Bedford Road:** The site, opposite the Odeon Cinema, including the surface 68 space pay and display car park is being considered for a mixed use development, and if required a new bus station.

5.7 **Portsmouth Road:** The site provides 98 short stay spaces at the weekend and is being considered used for mixed use including retail, residential, commercial and leisure uses.

5.8 **Guildford Park:** The current 400 space long-stay car park at Guildford Park is being considered for housing and parking.

Development Scenarios and Parking Supply

5.9 There are a number of town centre proposals in the pipeline, many involving the redevelopment of certain town centre car parks and all involving an increase in associated trips. Due to the uncertainty in the status and scale of developments, a number of development scenarios have been put together to help determine the need for future parking levels in the town:

- Background Growth: This scenario assumes no specified developments in the town centre. Growth in parking demand comes from TEMPRO forecasts. This is an intermediate forecast.
- Low Growth: Bellerby Theatre (Waitrose).
- Medium Growth: all town centre proposals except The Friary.
- High Growth: all town centre proposals including The Friary.

5.10 Many of the developments involve redeveloping town centre car parks, with or without plans for the replacement of spaces. Table 5.1 records the net change in parking supply associated with each scenario.

TABLE 5.1 FORECAST NET PARKING SUPPLY

Scenario	Weekday Morning Peak Period		Friday Evening		Saturday Morning Peak Period	
	Short stay	Long stay	Short stay	Long stay	Short stay	Long stay
Existing Parking Supply (2012)	2832	2005	2930	2005	3180	1939
Low Growth (2031)	3000 (168)	1934 (-71)	3098 (168)	1934 (-71)	3277 (97)	1939 (0)
Medium Growth (2031)	2434 (-398)	1960 (-45)	2532 (-398)	1960 (-45)	2711 (-469)	1965 (26)
High Growth (2031)	2434 (-398)	1960 (-45)	2532 (-398)	1960 (-45)	2711 (-469)	1965 (26)

Parking Standards

5.11 The parking density described in the previous section measures the actual provision of parking stock and reflects historic policies for provision in the town centres. With current national and local policy steering toward more sustainable development and travel patterns, the introduction of stricter controls on parking is seen as a way of managing demand. Guildford's current parking standards define the normal maximum provision of car parking spaces permitted on development sites. With the availability of car parking one of the major influences on the choice of transport mode, the adoption of maximum parking standards is one of the most important travel demand tools available to local authorities. The Council's current Supplementary Planning Document (September 2006) for parking spaces allows:

- food retail greater than 1,000 square metres: 1 space per 14 square metres; and
- other A1 non-food retail: 1 space per 25 square metres

5.12 Within Guildford Town Centre however, parking levels will normally be restricted to up to 25% of these adopted standards due to the high level of public transport accessibility within the town centre. It is considered more appropriate for developers to provide improvements to public transport, walking and cycling instead of on-site parking. These standards are currently being reviewed.

5.13 As well as the town centre's public transport accessibility, local traffic management issues will also need to be considered when determining options for parking in Guildford. The following section considers Guildford's public transport network as well as local traffic management issues.

Development Floor-Space

5.14 Table 5.2 summarises the development scenarios in terms of additional town centre commercial floor-space.

TABLE 5.2 DEVELOPMENT SCENARIOS

Scenario	Additional Floor-space ($000m^2$)		Total Floor-space ($000m^2$)	
	Retail	Business	Retail	Business
Existing Floor Space (2011)	-	-	120	102
Low Growth (2031)	4	0	124	102
Medium Growth (2031)	5	10	125	112
High Growth (2031)	51	10	171	122

Parking Supply by Parking Standard

5.15 Table 5.3 below applies the maximum parking standards to the amount of additional floor-space to calculate a maximum number of additional parking spaces that would be permissible under existing standards.

TABLE 5.3 ADDITIONAL PARKING SUPPLY – PARKING STANDARDS

Scenario	Weekday Morning Peak Period		Friday Evening		Saturday Morning Peak Period	
	Short stay	Long stay	Short stay	Long stay	Short stay	Long stay
Low Growth (2031)	80	0	80	0	80	0
Medium Growth (2031)	119	100	119	100	119	100
High Growth (2031)	1,039	100	1,039	100	1,039	100

Parking Supply by Maintaining Existing Densities

5.16 Table 5.4 below applies the existing parking densities to the level of development by land-use, much like the application of a 'minimum' (as opposed to maximum) parking standard, to calculate the additional number of parking spaces required to maintain the parking densities for each land-use. Existing densities are 24 to 27 short-stay spaces per 1,000 square metres of retail floor space (depending on day of week and time), and around 20 long-stay spaces per 1,000 square metres of business floor-space.

TABLE 5.4 ADDITIONAL PARKING SUPPLY - MAINTAINING PARKING DENSITIES

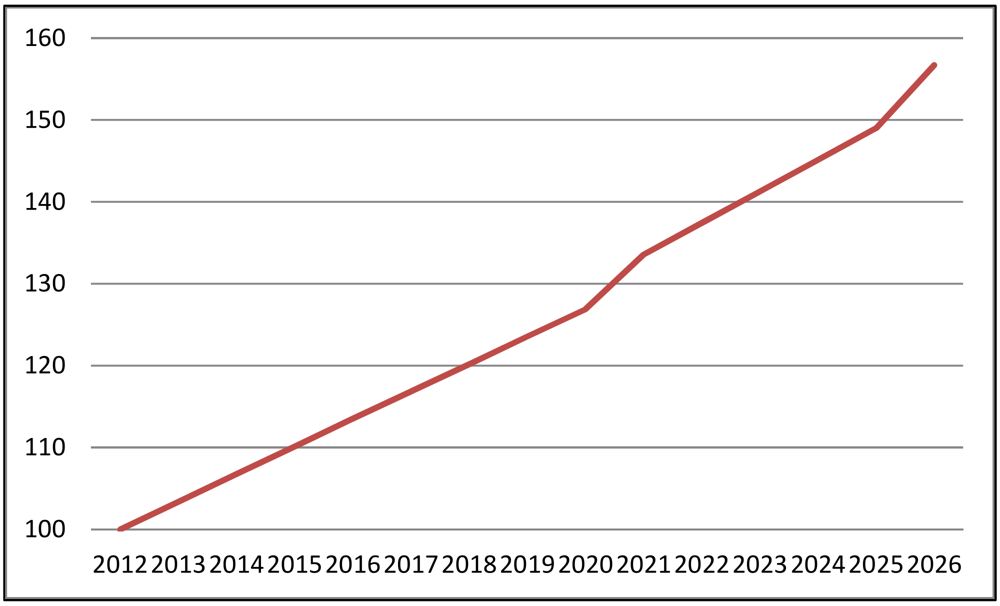
Scenario	Weekday Morning Peak Period		Friday Evening		Saturday Morning Peak Period	
	Short stay	Long stay	Short stay	Long stay	Short stay	Long stay
Low Growth (2031)	94	0	98	0	106	0
Medium Growth (2031)	117	197	121	197	132	190
High Growth (2031)	1,203	197	1,244	197	1,351	190

Parking Demand

Recent Trends in Retail Activity

5.17 Another indicator of the demand for parking is likely growth in retail expenditure. The Roger Tyms Town Centre Retail Study (2011) looked ahead to 2026 and predicted significant growth in town centre retail expenditure per head, both in convenience and comparison shopping. While the relationship between expenditure and trips to the town is not linear (there will be growth in spend per trip as well as additional trips), it does indicate increased consumer activity of nearly 60% on current levels in the town by 2026. Figure 5.1 below illustrates this. Further factors influencing future parking demand will be the intensification and diversification of the town centre's commercial offer which will bring increases in both spend per head and total volume of visitors.

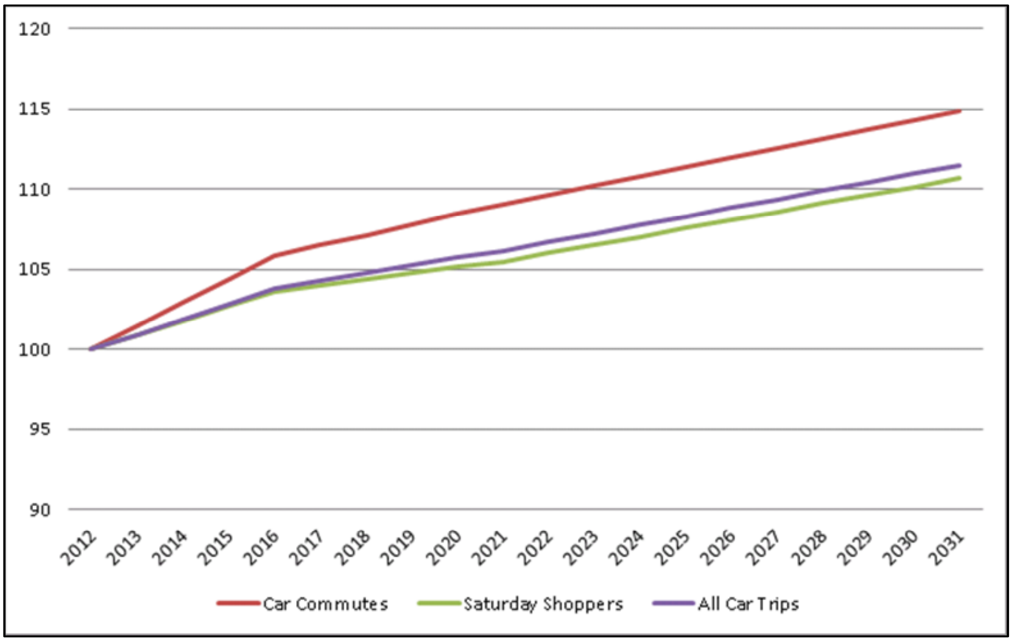
FIGURE 5.1 INDEXED GROWTH IN GUILDFORD RETAIL EXPENDITURE



TEMPRO Growth Forecasts

5.18 The Department for Transport maintains the National Trip End Model (NTEM) that supplies trip growth factors, by journey purpose, for the traffic models in application across the country. The basis for these forecasts is TEMPRO Version 6.0, which has been interrogated here to provide growth forecasts for weekday work trips, Saturday shopping trips as well as inter peak trips. Figure 5.2 shows the results of this analysis as growth in a number of key trip metrics between 2012 and 2031.

FIGURE 5.2 INDEXED GROWTH IN PARKING DEMAND (TEMPRO)



5.19 There is forecast growth across all journey purposes to 2031, with the highest growth in car commuters (15%). The number of Saturday shoppers is forecast to grow by approximately 11%. These forecasts do contain a certain amount of planning data from local authorities, and whilst the details of the development assumptions are not known in detail, it provides another set of nationally recognised forecasts, against which to benchmark the three other growth scenarios.

Parking Demand Scenarios

5.20 Based on forecast growth in parking demand from background growth and development assumptions, the following tables outline a range of parking demand scenarios to apply to the growth scenarios. Additional parking demand has been based on two different drivers:

- demand-led using TEMPRO database; and
- demand-led using TRICS database.

5.21 TRICS is an industry standard, national database, for calculating trip generation for different land uses, by time of day, and has applied to the level of planned development for each associated land use.

Parking Demand Scenarios

5.22 Table 5.5 below summarises the additional demand, in terms of vehicle trips, that is associated with the three growth scenarios. This includes TEMPRO v6.0 which has its own growth scenario assumptions, and the application of TRICS to the three locally defined growth scenarios. Forecasts record peak hour trips.

5.23 Short stay trips have been associated with retail growth, while long stay trips have been associated with employment growth. For large mixed use developments it is customary to reduce the total TRICS trip forecasts by 20% to simulate that many trips will be existing linked trips, rather than entirely new trips. The table below summarises.

TABLE 5.5 ADDITIONAL PARKING DEMAND FORECASTS

Scenario	Weekday Morning Peak Period		Friday Evening		Saturday Morning Peak Period	
	Short stay	Long stay	Short stay	Long stay	Short stay	Long stay
TEMPRO Growth (2031)	154	212	150	39	287	91
Low Growth (2031)	112	0	72	0	125	0
Medium Growth (2031)	139	162	90	3	155	3
High Growth (2031)	434	162	800	3	1,284	3

5.24 Table 5.6 below shows the associated net increases in parking demand for the four growth scenarios using TEMPRO and TRCIS.

TABLE 5.6 TOTAL PARKING DEMAND FORECASTS

Scenario	Weekday Morning Peak Period		Friday Evening		Saturday Morning Peak Period	
	Short stay	Long stay	Short stay	Long stay	Short stay	Long stay
TEMPRO Growth (2031)	2077	1622	1818	315	2895	845
Low Growth (2031)	2035	1410	1740	276	2733	755
Medium Growth (2031)	2063	1572	1758	280	2763	758
High Growth (2031)	2357	1572	2468	280	3892	758

Parking Occupancy

5.25 Translating TEMPRO and TRICS demand forecasts using the four development scenarios, against the parking supply forecasts, results in the parking occupancies shown in Table 5.7 below.

TABLE 5.7 PARKING OCCUPANCY FORECASTS

Scenario	Weekday Morning Peak Period		Friday Evening		Saturday Morning Peak Period	
	Short stay	Long stay	Short stay	Long stay	Short stay	Long stay
TEMPRO Growth (2031)	73%	81%	62%	16%	91%	44%
Low Growth (2031)	68%	73%	56%	14%	83%	39%
Medium Growth (2031)	85%	80%	70%	14%	102%	39%
High Growth (2031)	97%	80%	97%	14%	144%	39%

5.26 Guildford Borough Council's policy is to aim for 85% occupancy of car parks. As there is excess capacity in town centre car parks, much demand can be absorbed into the spare capacity. Table 5.8 shows the parking supply deficit, in excess of 85% occupancy by development scenario, that is, how many additional bays are needed, per scenario, assuming existing mode share to maintain an 85% average parking occupancy.

TABLE 5.8 PARKING SUPPLY DEFICIT AT 85% PARKING OCCUPANCY TARGET

Scenario	Weekday Morning Peak Period		Friday Evening		Saturday Morning Peak Period	
	Short stay	Long stay	Short stay	Long stay	Short stay	Long stay
TEMPRO Growth (2031)	-330	-83	-673	-1389	192	-803
Low Growth (2031)	-515	-234	-893	-1367	-52	-893
Medium Growth (2031)	-6	-94	-394	-1386	459	-912
High Growth (2031)	288	-94	316	-1386	1588	-912

5.27 Inspection of Table 5.8 shows that in all but the high growth scenarios there is existing capacity to absorb the new demand during the week and the evening. However the high growth development scenario shows additional parking supply is required for short-stay parking during all peak time periods. Assuming a target 85% average parking occupancy, the supply parking deficit would be:

- 288 short-stay parking spaces on weekday morning;
- 316 short-stay parking spaces on Friday evenings; and
- 1,588 short-stay parking spaces on Saturday mornings.

5.28 The TEMPRO growth scenario and Medium Growth Scenario also show a need to increase short-stay parking on Saturdays by 192 and 459 spaces respectively to accommodate growth in shopping traffic, assuming an 85% parking occupancy level.

5.29 It is noted that the 85% occupancy, while a target, is very difficult to achieve in practice and leaves little room to accommodate peak surges, such as the run up to Christmas and January 'Sales'. Going forward into Stage 2, this target will be explored further.

6 Summary and Next Steps

Summary

6.1 Under most development scenarios, the existing parking supply would be able to absorb much of the growth in parking demand, albeit increasing parking occupancy above the target of 85% and reducing the ability of parking supply to absorb fluctuations in demand, for example, Christmas shopping parking. However, the high growth development scenario shows additional parking supply is required for short-stay parking during all peak time periods. Assuming a target parking occupancy level of 85% across the town centre; the same balance of short-stay and long-stay parking; and the same mode share, the additional parking supply requirement would be:

- 288 short-stay parking spaces on weekday morning;
- 316 short-stay parking spaces on Friday evenings; and
- 1,588 short-stay parking spaces on Saturday mornings.

6.2 These forecasts focus on town centre capacity and do not include the 550 space Park and Ride Onslow site at Manor Park currently under construction.

6.3 The development scenarios also involve a net reduction in parking supply as developments are built on existing parking sites. Earlier analysis of forecast parking supply **using parking standards** indicated that under the different development scenarios, a current maximum permissible increase in parking supply would be:

- Low Growth to 2031: **80 short-stay** spaces for retail development, and no additional long-stay spaces for office development.
- Medium Growth to 2031: **119 short-stay** spaces for retail development, and **100 long-stay** spaces for office development.
- High Growth to 2031: **1,039 short-stay** spaces for retail development, and **100 long-stay** spaces for office development.

6.4 If the current maximum parking standards were applied, then there would still be a parking supply deficit at certain time periods under different growth scenarios for short-stay parking. Assuming the 85% target occupancy level, no change in the balance of long-stay and short-stay parking, no replacement of lost parking, or no change in mode share, the additional parking requirement would be:

- TEMPRO Growth to 2031: unknown
- Low Growth to 2031: no additional parking requirement.
- Medium Growth to 2031: 357 short-stay parking spaces on Saturday mornings.
- High Growth to 2031: 705 short-stay parking spaces on Saturday mornings.

6.5 Guildford offers a favourable level of parking supply in relation to its accessibility and compared to competing centres. There are 27 short-stay parking spaces per 1,000m^2 of floor-space on Saturday mornings, and 19 long-stay spaces per 1,000m^2 of business floor-space on weekdays. Based on these current parking densities, the number of additional spaces would be:

- Low Growth to 2031: 94 to 106 short-stay parking spaces for retail development, and no additional long-stay parking spaces for office development.
- Medium Growth to 2031: 117 to 132 short-stay parking spaces for retail development, and 197 long-stay parking spaces for office development.
- High Growth to 2031: 1,203 to 1,351 short-stay parking spaces for retail development, and 197 long-stay parking spaces for office development.

6.6 If these densities were maintained, then there would still be a parking supply deficit at certain time periods under different growth scenarios for short-stay parking. Assuming the 85% target occupancy level, no change in the balance of long-stay and short-stay parking, no replacement of lost parking, or no change in mode share, the additional parking requirement would be:

- TEMPRO Growth to 2031: unknown.
- Low Growth to 2031: no additional parking requirement.
- Medium Growth: 346 short-stay parking spaces on Saturday mornings.
- High Growth: 439 short-stay parking spaces on Saturday mornings.

Next Steps

6.7 The analysis has focused on the future town centre parking requirements under a range of development scenarios, all assuming some initial loss of parking supply. The next stage in the strategic review will consider options on how best to cater for this increased demand in parking, considering:

- the need to support the dynamic economy of the whole town;
- the role of sustainable modes including Park & Ride can play;
- the management of existing parking supply;
- the appropriate location of any additional car parking including the quantum of land available for parking expansion, and joint development potential focusing on existing parking sites such as:
  - Bright Hill
  - Mary Road
  - Millbrook (decking)
  - York Road (potential to be redeveloped but expensive)
  - The Friary
  - Guildford Park
- the impact of traffic congestion and ways of mitigating it;
- the impact on financial position for the council in terms of income generation.

CONTROL SHEET

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