OPDC
OLD OAK AND
PARK ROYAL
DEVELOPMENT
CORPORATION

Car Parking Study

LOCAL PLAN SUPPORTING STUDY

2017

MAYOR OF LONDON

6. Car Parking Study

Document Title	Car Parking Study
Lead Author	Savills
Purpose of the Study	To provide a critical review of the proposed parking policy in the Local Plan from a market and viability perspective.
Key outputs	Critical review of the residential and non-residential parking policy including a desktop review of precedents.
Key recommendations	Recommends that the residential parking policy is appropriate, and that further consideration is required for the non-residential parking policy.
Relations to other studies	Outputs cross-relate to the Old Oak Strategic Transport Strategy and the Park Royal Transport Strategy.
Relevant Local Plan Policies and Chapters	Transport Chapter (particularly policy T4 (car parking))

Old Oak Common, London

Savills comments on OPDC Car Parking Policy

Private & Confidential

Contents

1. Overview

1.1. Site Context

- This area is considered as an 'Inner London' location.
- The sites sit within London Travel Zone 2 with the benefit of sound existing transport infrastructure. The new stations that will be delivered as part of the redevelopment will make these sites some of the best connected areas of London.
- The environment will be high density and deliver a mix of uses, including significant local amenity for workers and residents alike.

1.2. Summary of Our Views

- In the future the subject area will be one of the best connected locations in the UK with new stations for HS2, Crossrail and two London overground stations (Hythe Road and Old Oak Common Lane).
- However, until this significant new infrastructure are delivered the current PTAL level ranges between 1a and 3 and this needs to be considered when developing the car parking policy.
- **Impact on Commercial Property** – An initial low PTAL rating coupled with zero car parking could impact on lettability especially if competing regeneration schemes offer car parking provision. We do not expect zero car parking policy to impact rental value but rather affect void period. The extent will differ for each use and within each use class depending on typology. The location of commercial buildings will need to be carefully considered in order to mitigate the impact.
- **Impact on Residential Property –** Price point and residential tenure are key in the likely demand for parking. In recent years we are seeing a decrease in parking take up in mainstream schemes (under £1,000psf). Rental product is seeing lower demand still, with several PRS / Built to Rent schemes seeking car free or very low levels of parking. We consider the existing infrastructure to be good and temporary support via additional bus and cyc routes will ease concern over parking in early phases.
- In our appraisal of this strategy we have reviewed the London Plan, other large scale regeneration schemes in Greater London, together with our opinion as Agents.

1.3. The Proposals

a) Old Oak:
   i. Limiting car parking to 0.2 spaces per residential unit in the early years of development, reducing to car free when transport investment is committed.
   ii. Securing zero car parking for non-residential developments except for blue badge holders.

b) Park Royal:
   i. Limiting car parking to 0.2 spaces per residential unit in the early years of development, reducing to car free when transport investment is committed.
   ii. Allowing limited car parking for non-residential development taking into account access to public transport and operational or business needs.

2. Policy Context

The London Plan (March 2016) makes the following references to car parking:

2.1. Residential

- All developments in areas of good public transport accessibility in all parts of London should aim for significantly less than 1 space per unit.
- Adequate parking spaces for disabled people must be provided preferably on-site.
- 20 per cent of all spaces must be for electric vehicles with an additional 20 per cent passive provision for electric vehicles in the future.
- In outer London areas with low PTAL (generally PTALs 0-1), boroughs should consider higher levels of provision, especially to address 'overspill' parking pressures.

2.2. Retail

- Developments with a retail food provision over 2,500 sq m and a PTAL rating of 2 to 4 may provide a maximum of 1 space per every 18 - 25 sq m of gross floorspace.
- Development with a retail food provision over 2,500 sq m and a PTAL rating of 5 to 6 may provide a maximum of 1 space per every 25 - 38 sq m of gross floorspace.

2.3. Offices

- In line with non-operational maximum standards for employment B1: In inner London locations the maximum parking that may be provided is 1 space per 600 - 1,000 sq m GIA

2.4. Industrial

- Parking for commercial vehicles should be provided at a maximum of one space per 500 sq m of gross B2 (General Industrial) or B8 (Light Industrial) floorspace.

2.5. Hotel

- Although no maximum standards are set for hotels, the following approach should be taken for applications referred to the Mayor. In locations with a PTAL of 4 – 6, on-site provision should be limited to operational needs, parking for disabled people and that required for taxis, coaches and deliveries/servicing. In locations with a PTAL of 1 – 3, provision should be consistent with objectives to reduce congestion and traffic levels and to avoid undermining walking, cycling or public transport.

3. Car parking provision in regeneration schemes

The table below lists the car parking provisions (excluding blue badge spaces) for some of London's major regeneration schemes and also includes the PTAL rating to act as a benchmark for the subject site.

3.1. Residential Schemes

Scheme	London Borough	Site area (ha)	No. of Units	No. Parking Spaces	Car Parking Ratio	Date of Planning Consent	Planning Ref	PTAL
Elephant Park (Heygate Estate)	Southwark	9.71	2,462	*616**	0.25	Mar-13	12/AP/1092	6a
Wood Wharf	Tower Hamlets	3.27	3,107	*1,137**	0.37	Dec-14	PA/13/02966	6a
Kings Cross Central	Camden	5.00	2,550	1,275	Maximum 0.50 (0.20-0.25 delivered)	Dec-06	2004/2307/P	6b
Westfield Shepherds Bush	Hammersmith & Fulham	1.65	1,347	608	0.45	Sep-14	2013/05115/OUT	6a
ABP	Newham	15.59	885	443	0.50	Dec-15	14/00618/OUT	2
Cherry Park (Westfield), Stratford	LLDC	2.00	1,224	150	0.12	Pending	15/00358/OUT	6b
Stratford City	Newham	3.80	4,500	3,600	0.80	Feb-05	03/0607	6b
White City	Hammersmith & Fulham	4.28	1,465	595	0.41	Dec-15	2014/04726/OUT	6a
Television Centre	Hammersmith & Fulham	5.75	942	318	0.34	Apr-15	2014/02531/COMB	6a
Ruskin Square	Croydon	NKN	625	*256**	0.41	Oct-16	16/04422/NMA	6b
Wembley Park	Brent	15.87	5,486	1,926	0.35	Pending	15/5550	4

**Note this is the total parking provision not just residential, and therefore the actual residential ratio will be lower than that stated*

3.2. Commercial Schemes

Scheme	London Borough	Use	Amount (sqm)	No. Parking Spaces	Car Parking Ratio (1: per sqm)	Source	PTAL
King's Cross Central	Camden	Offices	c.315,870	Minimal	Minimal	Savills	6b (Best)
Building S5+S6 International Quarter, Stratford	Newham	Offices	c.93,050	55	1,692	Londonlegacy.co.uk	6b (Best)
ABP London	Newham	Offices	c.306,580	510	601	ABP	2
Canary Wharf	Tower Hamlets	Offices	c.1,486,450	2,500	595	canarywharf.com	6a
Floors 4 – 11, White City Campus	Hammersmith and Fulham	Offices	c.10,220	20	511	Savills	6a
Ruskin Square	Croydon	Offices	c.120,140	256	469	Savills + london.gov.uk	6b (Best)
Westworks Building White City Place	Hammersmith and Fulham	Offices	c.26,940	66	408	whitecityplace.com	6a
Chiswick Park	Hounslow	Offices	c.171,870	18,50	93	Savills	3
Westfield, Stratford	Newham	Retail	c.176,515	5,000	35	westfieldcorp.com + uk.westfield.com	6b (Best)
Westfield, Shepherds Bush	Hammersmith and Fulham	Retail	c.150,050	4,500	33	westfieldcorp.com + uk.westfield.com	6a

Please note that the areas and parking ratios have been sourced from a variety of authors i.e. online databases, local agents, brochures and therefore must be relied upon as such.

4. Savills Comments

4.1. General

- This area is considered as an 'Inner London' location. It is within London Travel Zone 2 with the benefit of sound existing transport infrastructure. The new stations that will be delivered as part of the redevelopment will make these sites some of the best connected areas of London. The environment will be high density and have significant local amenity.
- Section 3 above illustrates that the majority of the current regeneration schemes do have car parking provision, with the exception of King's Cross which is arguably one of the most connected sites in terms of public transport.
- The level of parking provision across the schemes does show clearly that more central (therefore better connected sites) have lower parking ratios.
- It should be noted that some of the consents are now quite dated and the parking provision is a maximum rather than a target. Kings Cross residential is a good example of this, they have a maximum of 0.50 ration, but the three residential buildings they have delivered to date have a maximum of 0.25.
- The existing transport infrastructure is very good. Willesden Junction and North Acton stations are in reasonable proximity to the Old Oak Masterplan area. Additional bus routes and cycle hire could help to support the connectivity in early phases.

4.2. Residential

- London has low levels of car ownership; in 2011, as many as 70% per cent of households in London did not own a car. This downwards trend of decreasing car ownership is expected to continue.
- Car clubs are growing in popularity as they present a convenient alternative to car ownership. Many new build developments are now including them as an amenity offer.
- Different residential tenures also have different parking demand. Increasingly we are seeing rental product requiring lower levels of parking compared to product for sale.
- Many purpose built rental schemes are currently designing and submitting planning applications for car free or very low parking ratios.
- The demand for parking is also price sensitive. There is a clear pattern in the London market where as residential property prices increase, so does the demand for parking. Prime developments (£1,000psf or higher) will have a greater demand for parking in comparison to mainstream product.
- Phasing will be critical, residential plot delivery should be in conjunction with local amenities – retail and leisure – in order to serve the local community. This will help to minimise reliance on travel away from the development and create a sustainable community within Old Oak.

4.3. Commercial

- To fully assess the impact of on viability it would be important to develop target market strategy. For example most commercial occupiers located in Outer London locations are used to having access to car parking and would therefore prefer to take space at schemes with car parking. However Inner London occupiers are familiar with commuting via public transport and will mostly be concerned with public transport connectivity of the site.
- We do not expect zero car parking policy to impact rental value but rather affect void period. The extent will differ for each use and within each use class depending on typology:

- Different types of workspace typologies and uses will expect different degrees of car parking provision. For example workspace for SMEs / affordable workspace will expect less car parking (if any) than traditional office HQ occupiers.
- Restaurants / leisure operators seeking to be part of a 'destinational hub' would often seek car parking spaces more than high street retail shops. The provision of smaller foodstores i.e. Tesco Metro is not likely to require car parking as this suits the convenience 'grab n go' culture.
- Industrial units would require some car parking due to the nature of the workspace and types of customers i.e. often car borne and to assist with movement of heavy goods. Also to accommodate out of hours shift working and to support trade requirements.

- Providing an off-site/nearby multi-storey car park could be considered. The car park could operate in a sustainable way by encouraging "space sharing" through designating the spaces to office workers during normal business hours, overnight shift workers in the twilight hours and retailers on weekends and bank holidays. These spaces could be offered on an annual license.
- Any car parking should allow for electronic car charging points. Sustainability is an important part of the selection process for potential corporate occupiers and is very likely that companies will expect this type of provision as 'the norm' in 5-10 years.
- Therefore, whilst the majority of occupiers would expect some degree of car parking, which would be reflected in a slightly reduced target market and therefore increasing void period, we would not expect it to impact rental values. A careful marketing and PR strategy would be required to present this as a modern day sustainable exemplar scheme founded on excellent public transport connectivity etc similar to that at King's Cross.

4.4. Further thoughts

- Given the long-timescales and scale of this regeneration, it is worth considering the role of automated vehicles. GATEway, an £8m research project based in Greenwich, is currently trialling and validating a series of different car uses for automated vehicles.