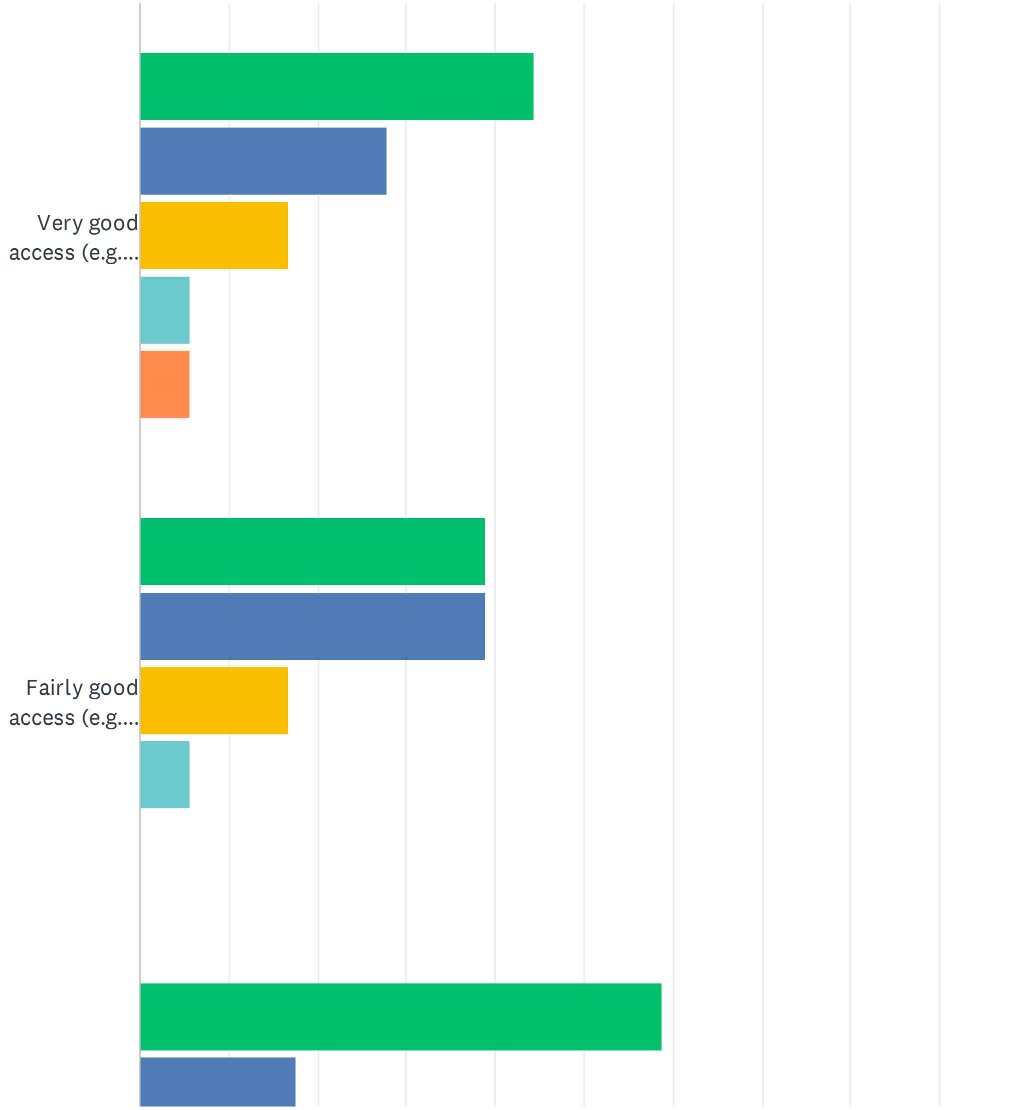
Q1 Name of company

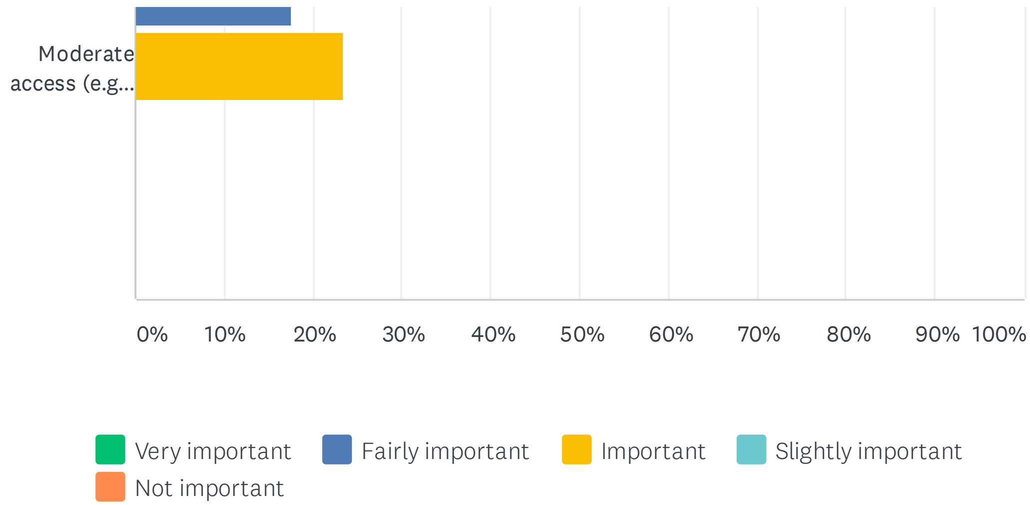
Answered: 18 Skipped: 1

#	RESPONSES	DATE
1	Crompton Estates	2/11/2021 1:48 PM
2	Anthony James Residential Ltd	2/11/2021 11:45 AM
3	village estates	2/11/2021 8:06 AM
4	village estates	2/10/2021 4:58 PM
5	Robinson Jackson Northumberland Heath	2/10/2021 1:09 PM
6	Capital Estate Agents	2/10/2021 12:32 PM
7	Jennings and Barrett	2/10/2021 12:20 PM
8	Harpers &Co	2/10/2021 12:15 PM
9	Livermores Estate Agents	2/10/2021 12:08 PM
10	Anthony Martin Estate Agents	2/10/2021 11:50 AM
11	Robinson Jackson	2/10/2021 11:47 AM
12	Pickering Estates Limited	2/10/2021 11:36 AM
13	Robinson - Jackson blackfen	2/5/2021 10:20 AM
14	Belvoir Sidcup	2/1/2021 3:15 PM
15	Acorn	2/1/2021 9:23 AM
16	Ewemove	1/30/2021 11:16 AM
17	Drewery	1/29/2021 4:39 PM
18	Maceys Estates Ltd	1/29/2021 2:27 PM

Q2 In your experience, how important is the amount of off street parking provision to your purchasers'/tenants' decisions about buying/renting family housing (2+ bedrooms) in the following circumstances? (please tick one option under each circumstance)

Answered: 19 Skipped: 0

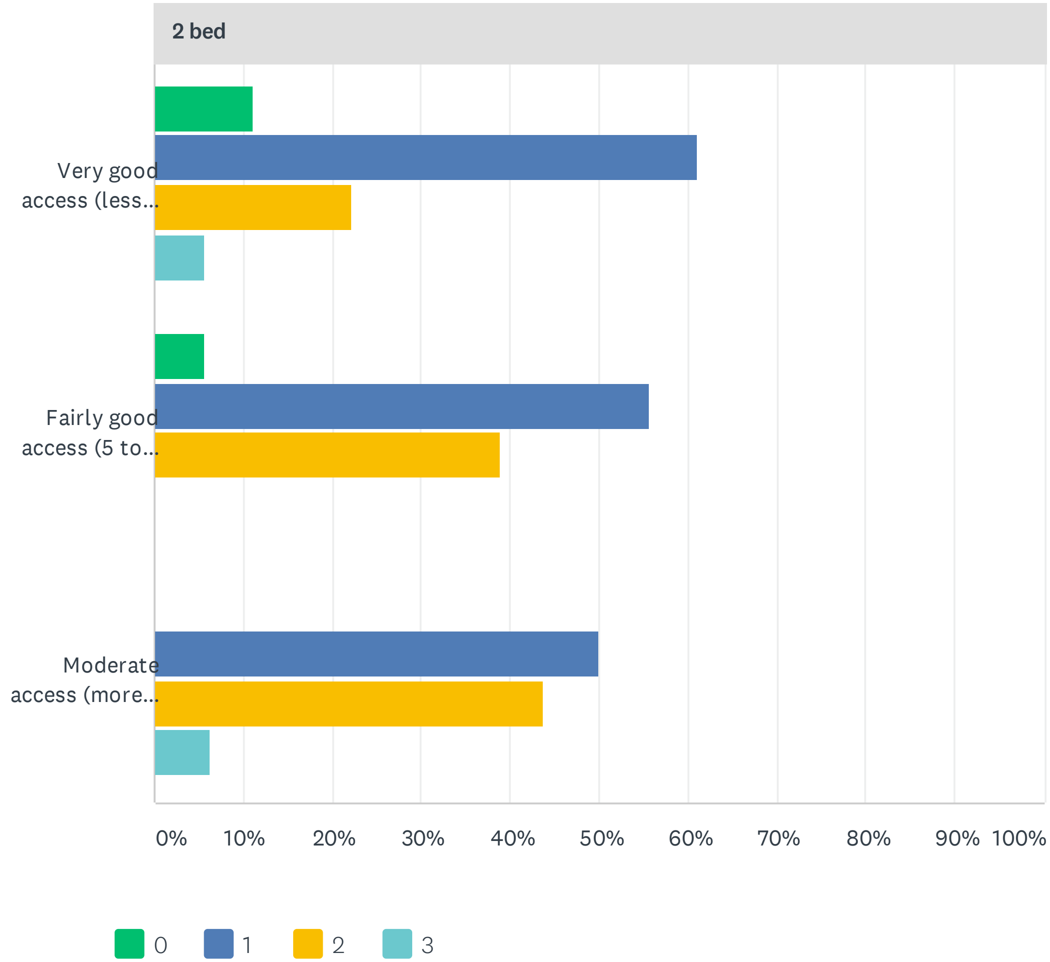


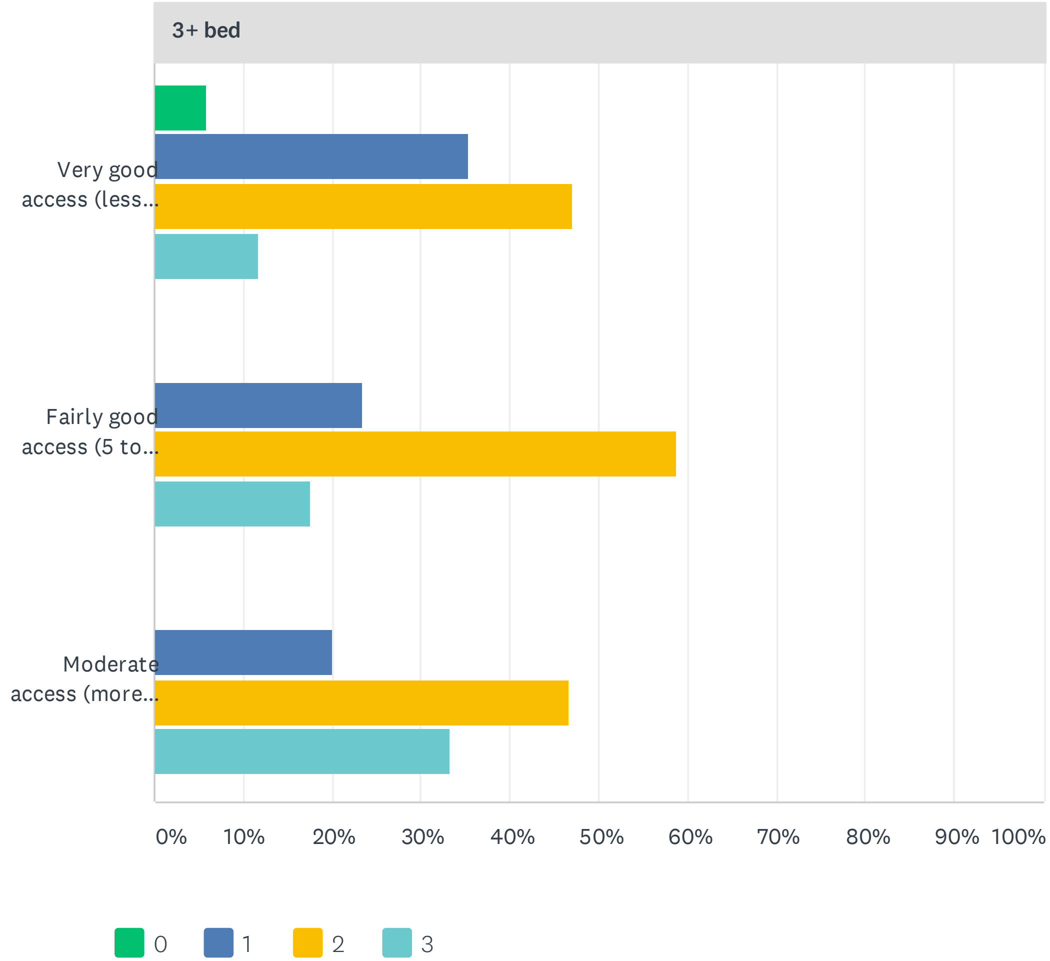


	VERY IMPORTANT	FAIRLY IMPORTANT	IMPORTANT	SLIGHTLY IMPORTANT	NOT IMPORTANT	TOTAL RESPONDENTS
Very good access (e.g. Less than 5 mins walk from town centres and railway station)	44.44% 8	27.78% 5	16.67% 3	5.56% 1	5.56% 1	18
Fairly good access (e.g. 5 to 10 mins' walk from town centres and railway station)	38.89% 7	38.89% 7	16.67% 3	5.56% 1	0.00% 0	18
Moderate access (e.g More than 10 mins' walk from town centre & railway station)	58.82% 10	17.65% 3	23.53% 4	0.00% 0	0.00% 0	17

Q3 In your experience, what sort of off street parking levels do your purchasers/tenants seek in the following circumstances (please enter a parking figure from the drop down menu for each type of dwelling in each circumstance)

Answered: 19 Skipped: 0



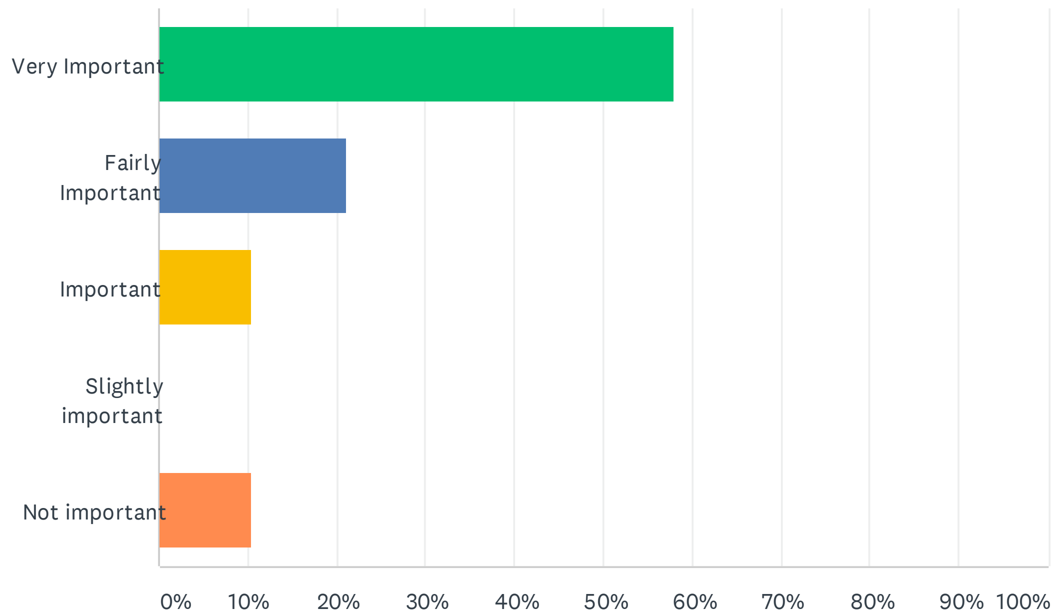


2 bed					
	0	**1**	**2**	**3**	**TOTAL**
Very good access (less than 5 mins walk from town centre and railway station)	11.11% 2	61.11% 11	22.22% 4	5.56% 1	18
Fairly good access (5 to 10 mins walk from town centre and railway station)	5.56% 1	55.56% 10	38.89% 7	0.00% 0	18
Moderate access (more than 10 mins walk from town centre and railway station)	0.00% 0	50.00% 8	43.75% 7	6.25% 1	16

3+ bed					
	0	1	2	3	TOTAL
Very good access (less than 5 mins walk from town centre and railway station)	5.88% 1	35.29% 6	47.06% 8	11.76% 2	17
Fairly good access (5 to 10 mins walk from town centre and railway station)	0.00% 0	23.53% 4	58.82% 10	17.65% 3	17
Moderate access (more than 10 mins walk from town centre and railway station)	0.00% 0	20.00% 3	46.67% 7	33.33% 5	15

Q4 The new London Plan will impose a range of maximum parking standards for family housing in outer London. Below is a summary of the London Plan standards for family housing in low accessibility outer London areas: Area Bedrooms Maximum spaces per unit outside Opportunity Areas Poor accessibility (PTAL* 2) 2 0.75 Poor accessibility (PTAL 2) 3+ 1 Very Poor accessibility (PTAL 0-1) 2 1.5 Very Poor accessibility (PTAL 0-1) 3+ 1.5 * Public Transport Accessibility Level – a measure of the accessibility of a point to the public transport network using walking distances to stops, service frequencies and reliabilityIn your opinion, how important would a local planning policy giving flexibility to increase these standards be in helping make family housing more attractive to your clients? (tick one option)

Answered: 19 Skipped: 0



ANSWER CHOICES	RESPONSES	
Very Important	57.89%	11
Fairly Important	21.05%	4
Important	10.53%	2
Slightly important	0.00%	0
Not important	10.53%	2
TOTAL		19

Q5 If there is anything further you would like to add on this issue please use the available space below.

Answered: 4 Skipped: 15

#	RESPONSES	DATE
2	almost every property requires a min 2 parking spaces. A typical family with 2 children need one vehicle for work and another for family Anything less than 2 spaces is not well considered and out of touch. It would only increase demand on properties with more parking and create a tier borough. it would harm the borough economically as talented working commuters with more money will purchase just outside Bexley.	2/11/2021 11:45 AM
3	For younger people having a car and the expense associate is more of a burden. Older people who have always been use to a car don't seem to appreciate that. Technology like Uber has changed things. If parking is offered with no or minimal charge people will gladly take it for convenience but it is becoming much less important than it once was. But that does not help in making Bexley more environmental friendly and reducing down emission. If parking was reduced people would still purchase and rent property. Your survey implies a 10 minute walk to a station is a long way. A 10 minute walk is not long. 15 minutes is when it starts to become inconvenient. The new London Plan is a sensible approach for change. It will make the borough more environmental friendly and encourage more walking / cycling etc which is good for peoples health.	2/1/2021 9:23 AM
4	Parking is a key selling point to any property and has a big impact. Family homes will expect to have at least 2 spaces and any flat in a central location will expect some form of parking. Flats that are centrally located without parking are always impacted price wise and are certainly less desirable.	1/29/2021 4:39 PM

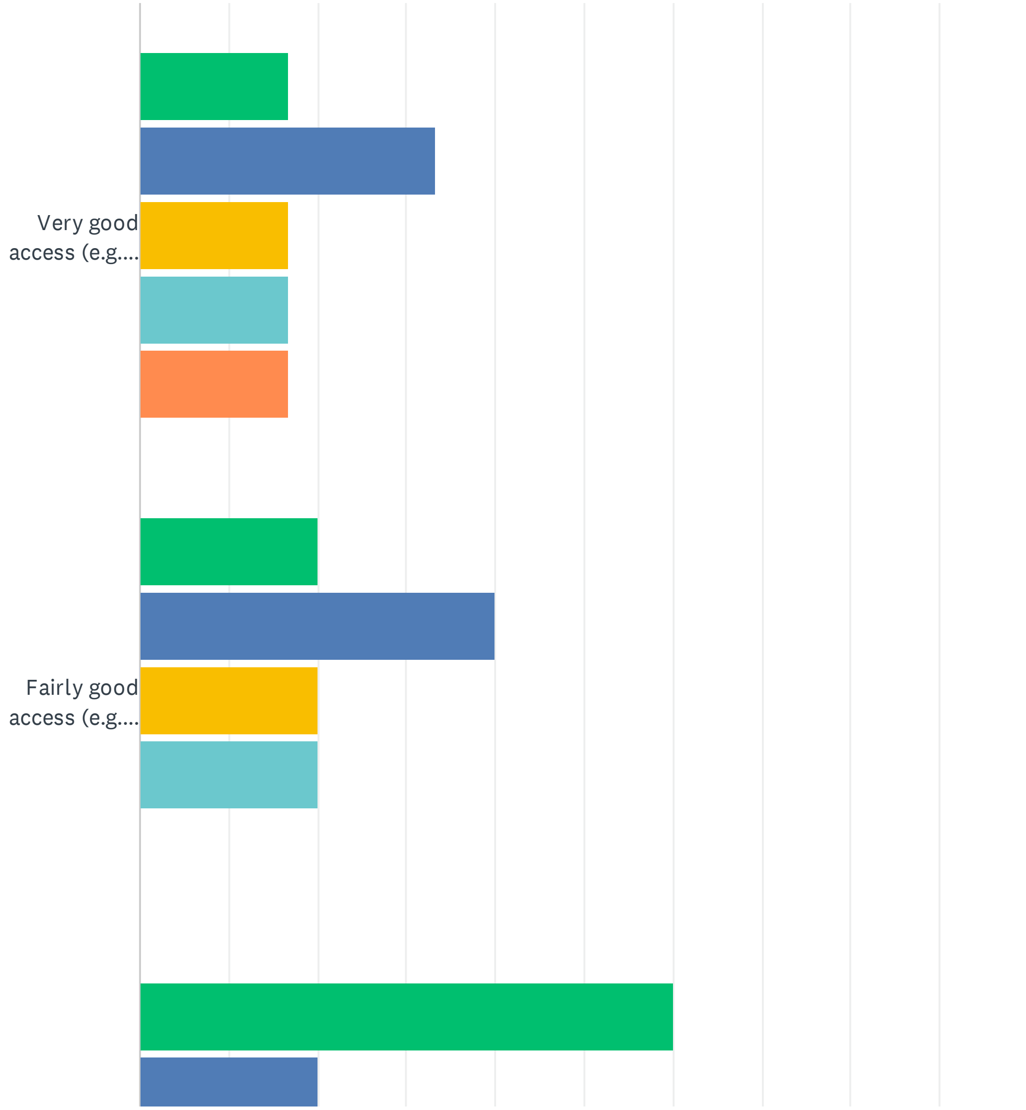
Q1 Name of company

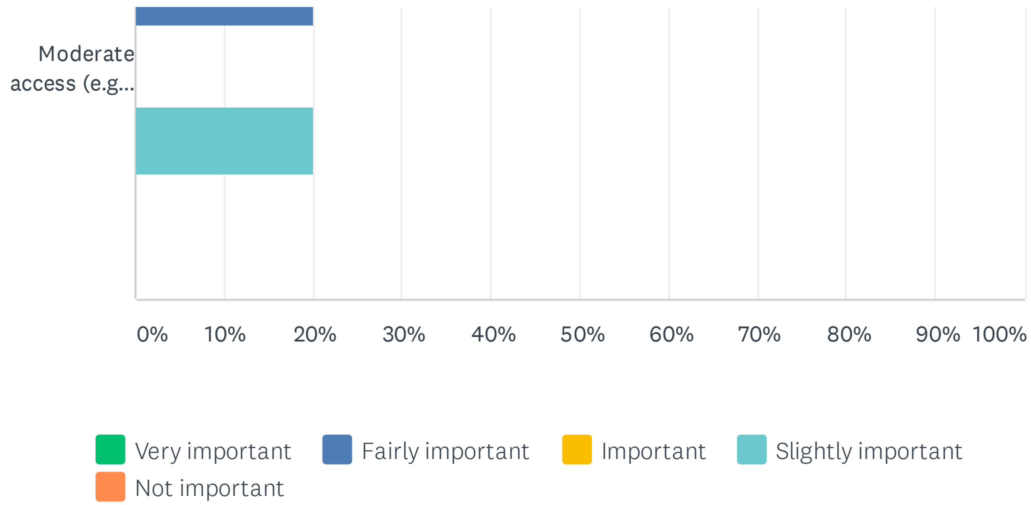
Answered: 6 Skipped: 0

#	RESPONSES	DATE
1	Caldecotte Group	2/17/2021 3:04 PM
2	Anderson Group (Erith Hills LLP)	2/16/2021 12:13 PM
3	Shanly Homes Limited	2/11/2021 2:30 PM
4	Fairfax Acquisitions Ltd	2/11/2021 12:02 PM
5	BexleyCo	2/2/2021 4:51 PM
6	Hatherley Investments Ltd	1/29/2021 3:24 PM

Q2 In your experience, how important is the amount of off street parking provision to your purchasers'/tenants' decisions about buying/renting family housing (2+ bedrooms) in the following circumstances? (please tick one option under each circumstance)

Answered: 6 Skipped: 0

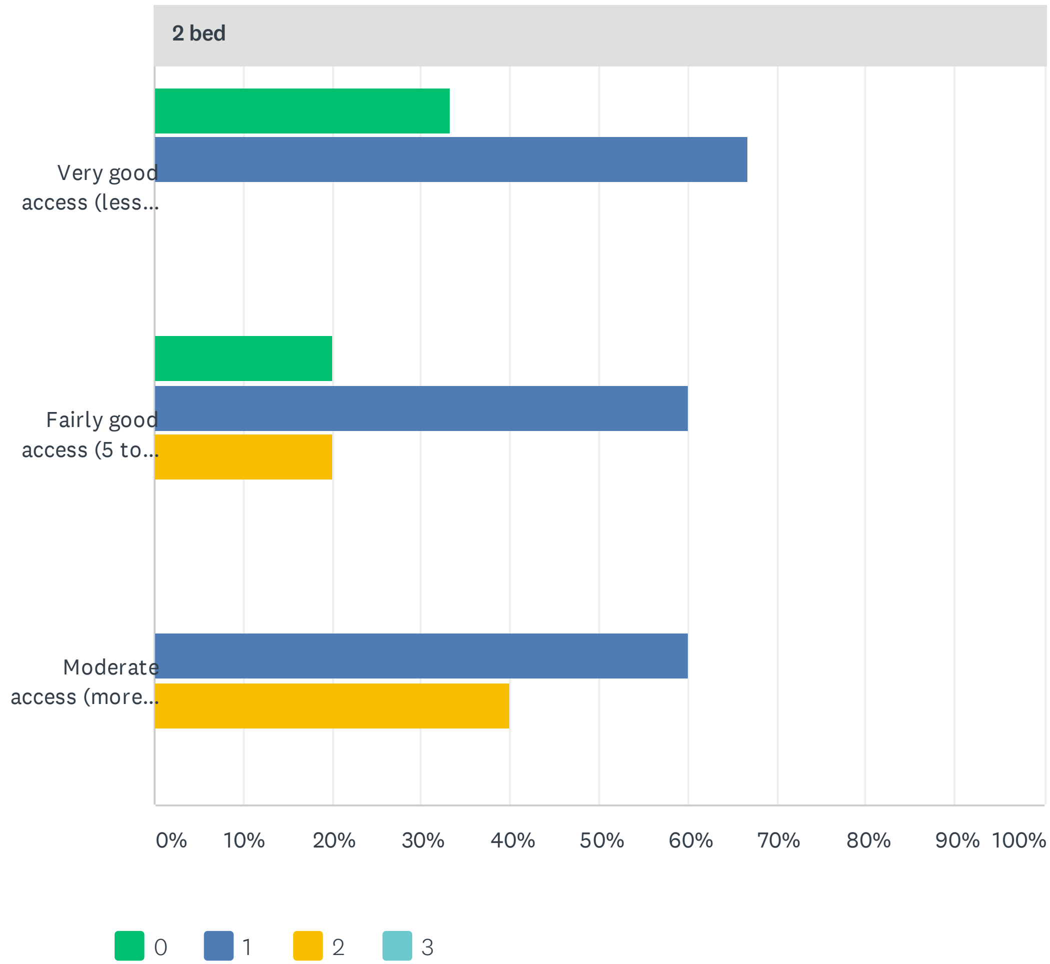


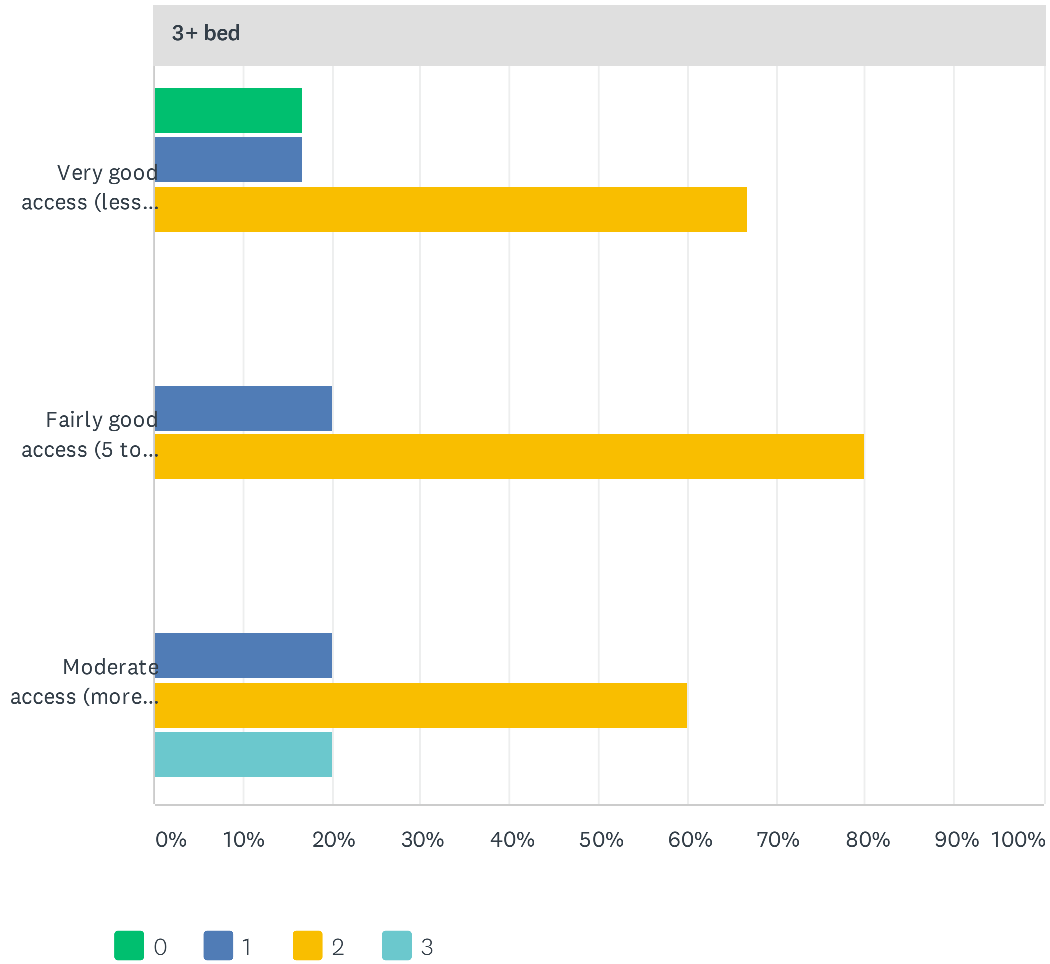


	VERY IMPORTANT	FAIRLY IMPORTANT	IMPORTANT	SLIGHTLY IMPORTANT	NOT IMPORTANT	TOTAL RESPONDENTS
Very good access (e.g. Less than 5 mins walk from local services and railway station)	16.67% 1	33.33% 2	16.67% 1	16.67% 1	16.67% 1	6
Fairly good access (e.g. 5 to 10 mins' walk from local services and railway station)	20.00% 1	40.00% 2	20.00% 1	20.00% 1	0.00% 0	5
Moderate access (e.g More than 10 mins' walk from local services and railway station)	60.00% 3	20.00% 1	0.00% 0	20.00% 1	0.00% 0	5

Q3 In your experience, what sort of off street parking levels do your purchasers/tenants seek in the following circumstances (please enter a parking figure from the drop down menu for each type of dwelling in each circumstance)

Answered: 6 Skipped: 0



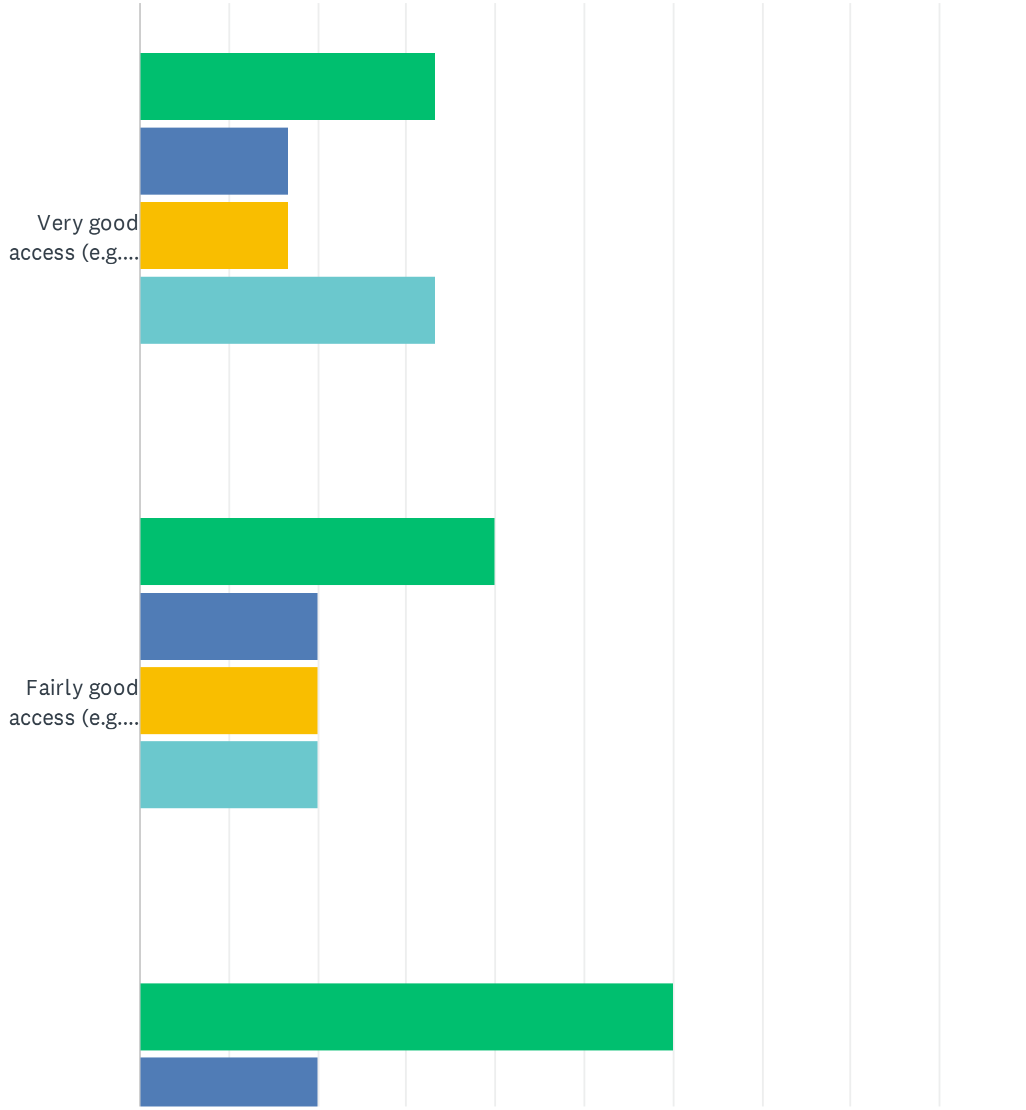


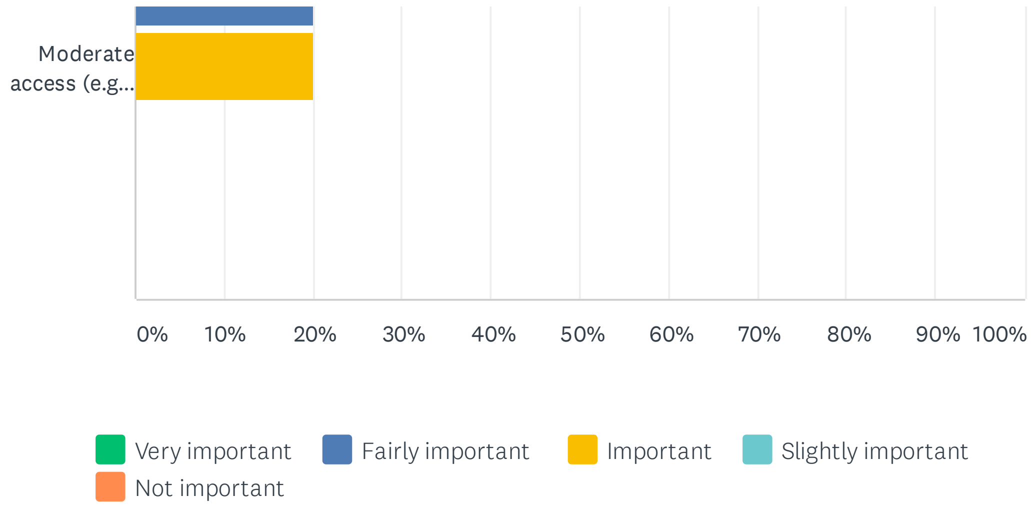
2 bed					
	0	1	2	3	TOTAL
Very good access (less than 5 mins walk from local services and railway station)	33.33% 2	66.67% 4	0.00% 0	0.00% 0	6
Fairly good access (5 to 10 mins walk from local services and railway station)	20.00% 1	60.00% 3	20.00% 1	0.00% 0	5
Moderate access (more than 10 mins walk from local services and railway station)	0.00% 0	60.00% 3	40.00% 2	0.00% 0	5

3+ bed					
	0	**1**	**2**	**3**	**TOTAL**
Very good access (less than 5 mins walk from local services and railway station)	16.67% 1	16.67% 1	66.67% 4	0.00% 0	6
Fairly good access (5 to 10 mins walk from local services and railway station)	0.00% 0	20.00% 1	80.00% 4	0.00% 0	5
Moderate access (more than 10 mins walk from local services and railway station)	0.00% 0	20.00% 1	60.00% 3	20.00% 1	5

Q4 How important to your decisions about how much family housing to provide on developments in different areas is your ability to reflect purchaser/tenant parking requirements for such accommodation? (tick one option under each circumstance)

Answered: 6 Skipped: 0

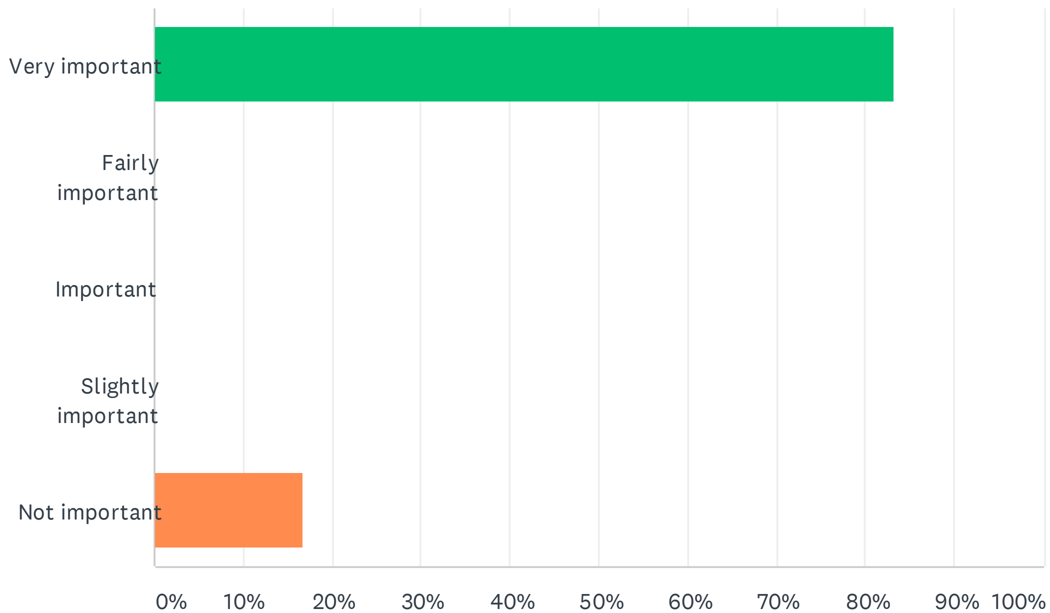




	VERY IMPORTANT	FAIRLY IMPORTANT	IMPORTANT	SLIGHTLY IMPORTANT	NOT IMPORTANT	TOTAL RESPONDENTS
Very good access (e.g. Less than 5 mins walk from town centre and railway station)	33.33% 2	16.67% 1	16.67% 1	33.33% 2	0.00% 0	6
Fairly good access (e.g. 5 to 10 mins' walk from town centre and railway station)	40.00% 2	20.00% 1	20.00% 1	20.00% 1	0.00% 0	5
Moderate access (e.g More than 10 mins' walk from town centre and railway station)	60.00% 3	20.00% 1	20.00% 1	0.00% 0	0.00% 0	5

Q5 The new London Plan will impose a range of maximum parking standards for family housing in outer London. Below is a summary of the London Plan standards for family housing in low accessibility outer London areas: Area Bedrooms Maximum spaces per unit outside Opportunity Areas Poor accessibility (PTAL* 2) 2 0.75 Poor accessibility (PTAL 2) 3+ 1 Very Poor accessibility (PTAL 0-1) 2 1.5 Very Poor accessibility (PTAL 0-1) 3+ 1.5 * Public Transport Accessibility Level – a measure of the accessibility of a point to the public transport network using walking distances to stops, service frequencies and reliability In your opinion, how important would a local planning policy giving flexibility to increase these standards be in helping you deliver family housing (tick one option)

Answered: 6   Skipped: 0



ANSWER CHOICES	RESPONSES	
Very important	83.33%	5
Fairly important	0.00%	0
Important	0.00%	0
Slightly important	0.00%	0
Not important	16.67%	1
TOTAL		6

Q6 If there is anything further you would like to add on this issue please use the available space below.

Answered: 2 Skipped: 4

#	RESPONSES	DATE
1	Parking is very important to secure Sales. Prohibitive parking policies may also affect the viability of developing potential housing sites that otherwise could deliver much needed housing.	2/11/2021 2:30 PM
2	Bexley as a suburban borough parking generally needs to be one for one across all tenures, unless there's an exceptional level of rail transport serving the site and a proven lack of demand for 100% parking. Two reasons for the above; if anything electric cars will abate some of the need for a reduction in car usage that might otherwise have occurred to decarbonise the economy and secondly if there is reduction in travel into central London, with more home working / living local then more local travel will more likely be car based as Bexley is not blessed with great public transport provision across (North / South routes etc) the borough.	2/2/2021 4:51 PM

Q1 Name of Registered Provider

Answered: 4 Skipped: 0

#	RESPONSES	DATE
1	L&Q	2/12/2021 11:13 AM
2	Peabody	2/11/2021 10:26 AM
3	HEXAGON HA	2/5/2021 11:46 AM
4	Orbit	2/1/2021 4:34 PM

Q2 What are the top three parking related issues that you have experienced in developing, designing and delivering new residential stock in the borough?

Answered: 4 Skipped: 0

#	RESPONSES	DATE
1	1. On flatted development, having to accommodate car parking within an under-croft space which is costly in terms of structural design and construction required but also uses up ground floor space that could alternatively be given over to homes, cycle parking or retail/commercial/community uses. 2. Having to meet 10% wheelchair accessible car parking provision from the outset on schemes when our experience shows a small uptake in demand for this type of car parking spaces.	2/12/2021 11:13 AM
2	1. Policy requirements prioritise private vehicle ownership over car clubs etc. which are growing in popularity and demand. 2. Meeting policy requirements requires significant on-street parking which has an adverse impact on the design of high quality public realm. 3. Meeting policy requirement requires underground, undercroft or podium parking solutions which are expensive to deliver and can negatively impact the design of ground floor homes.	2/11/2021 10:26 AM
3	HOW SPACES RELATE TO THE PROVISION OF EV CHARGING POINTS - EXTRA DEMANDS ON SPACE IF ALLOCATED PARKING PROVIDED AMOUNT OF SPACE CAR PARKING TAKES UP (COMPARED TO OTHER BOROUGHS)	2/5/2021 11:46 AM
4	1.Conflict within planning with no clear message to us as developers. GLA wants to minimise. Local planners are influenced by ward councillors who are anxious about shortfall. 2. Selling shared ownership without at least one parking space is an unacceptable risk given the lack of good public transport options, 3. Need for parking conflicts with providing quality landscaping and amenity. Low values in the borough make solutions like basements unaffordable , both in build costs and service charges	2/1/2021 4:34 PM

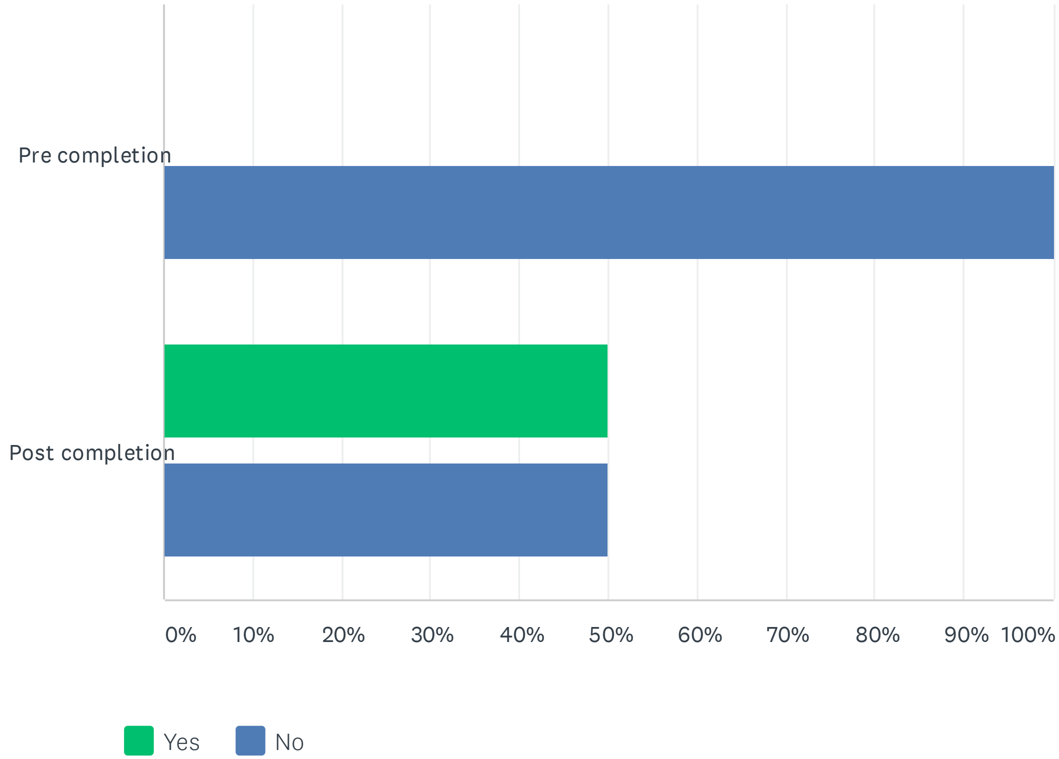
Q3 What are the top three parking management related issues you have faced in recent residential developments, post completion?

Answered: 4 Skipped: 0

#	RESPONSES	DATE
1	1. Anti-social behaviour in large enclosed car parks 2. Residents not parking in allocated spaces/ parking in a way that could block access for emergency services 3. Residents receiving parking fines for not complying with parking restrictions.	2/12/2021 11:13 AM
2	1. Lack of visitor bays 2. Lack of delivery bays 3. Security concerns/ASB/vandalised gates etc.	2/11/2021 10:26 AM
3	USERS NOT PARKING IN THEIR ALLOCATED BAYS DAMAGE TO BOLLARDS	2/5/2021 11:46 AM
4	1. Parking on landscaping and destroying it. 2. Tensions between neighbours - blocking in etc	2/1/2021 4:34 PM

Q4 Do these issues vary between tenures?

Answered: 4 Skipped: 0



	YES	NO	TOTAL RESPONDENTS
Pre completion	0.00% 0	100.00% 4	4
Post completion	50.00% 2	50.00% 2	4

Q5 If yes, please indicate how

Answered: 3 Skipped: 1

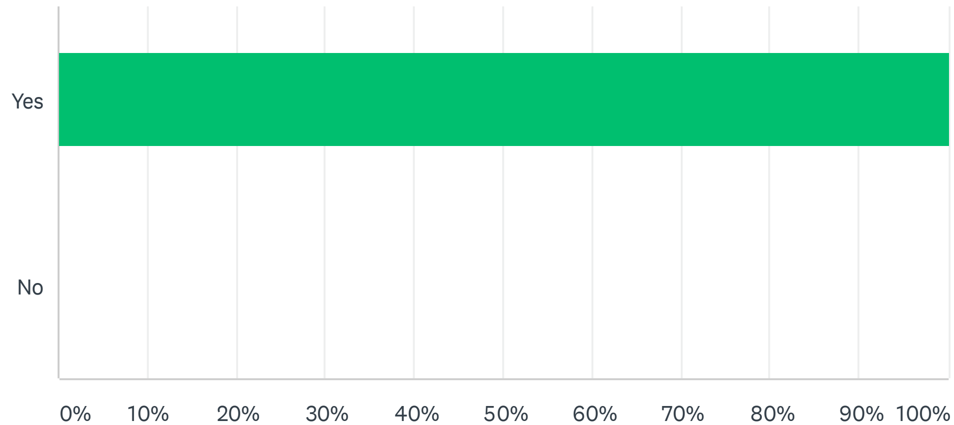
ANSWER CHOICES	RESPONSES	
Pre completion	66.67%	2
Post completion	100.00%	3

#	PRE COMPLETION	DATE
1	n/a	2/12/2021 11:13 AM
2	x	2/1/2021 4:34 PM

#	POST COMPLETION	DATE
1	In our experience, demand for wheelchair parking is low generally but particularly in private tenures.	2/12/2021 11:13 AM
2	leaseholders/freeholders can become more frustrated by the cost of parking provision and maintenance/repairs.	2/11/2021 10:26 AM
3	x	2/1/2021 4:34 PM

Q6 In your opinion, could changes in planning policy help to mitigate or prevent these issues?

Answered: 4 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	100.00%	4
No	0.00%	0
TOTAL		4

Q7 If yes, please indicate which of the following changes would be beneficial, ranking them by marking 1 as the most beneficial etc:

Answered: 4 Skipped: 0

ANSWER CHOICES	RESPONSES	
Greater flexibility in how you manage your parking e.g use of tandem spaces	100.00%	4
Greater flexibility in varying parking numbers (up or down) in different areas	100.00%	4
Greater ability to differentiate between tenures when setting parking numbers	100.00%	4
Greater emphasis on changing travel behaviour through travel plans etc	100.00%	4
Greater emphasis on improved infrastructure for active travel e.g cycle parking	75.00%	3
Other (please specify)	25.00%	1

#	GREATER FLEXIBILITY IN HOW YOU MANAGE YOUR PARKING E.G USE OF TANDEM SPACES	DATE
1	5	2/12/2021 11:13 AM
2	4	2/11/2021 10:26 AM
3	3	2/5/2021 11:46 AM
4	we have not had an issue with planning in this respect	2/1/2021 4:34 PM

#	GREATER FLEXIBILITY IN VARYING PARKING NUMBERS (UP OR DOWN) IN DIFFERENT AREAS	DATE
1	1	2/12/2021 11:13 AM
2	3	2/11/2021 10:26 AM
3	2	2/5/2021 11:46 AM
4	ditto	2/1/2021 4:34 PM

#	GREATER ABILITY TO DIFFERENTIATE BETWEEN TENURES WHEN SETTING PARKING NUMBERS	DATE
1	2	2/12/2021 11:13 AM
2	5	2/11/2021 10:26 AM
3	4	2/5/2021 11:46 AM
4	ditto	2/1/2021 4:34 PM

#	GREATER EMPHASIS ON CHANGING TRAVEL BEHAVIOUR THROUGH TRAVEL PLANS ETC	DATE
1	3	2/12/2021 11:13 AM
2	2	2/11/2021 10:26 AM
3	5	2/5/2021 11:46 AM
4	have never seen evidence that these make a significant difference in the absence of good public transport.	2/1/2021 4:34 PM

#	GREATER EMPHASIS ON IMPROVED INFRASTRUCTURE FOR ACTIVE TRAVEL E.G CYCLE PARKING	DATE
1	4	2/12/2021 11:13 AM
2	1	2/11/2021 10:26 AM
3	1	2/5/2021 11:46 AM

#	OTHER (PLEASE SPECIFY)	DATE
1	real changes to transport infrastructure to encourage lower car ownership. Cycle parking is minimal - cycling feels very unsafe in the North of the Borough without proper cycle routes. Car clubs need to be developed at a borough-wide level to ensure comprehensive coverage. co	2/1/2021 4:34 PM

Q8 If there is anything further you would like to add on these issues please use the available space below.

Answered: 2 Skipped: 2

#	RESPONSES	DATE
1	We feel it would also be beneficial if car parking requirements were in line with London Plan policy even in low PTAL areas. Wheelchair accessible car parking requirements should also be in line with the London Plan i.e. min. 3% provision. There are large parts of Bexley which are due to be served by improved transport infrastructure such as Crossrail over the Plan Period. The Council should seek reduce car parking standards in these areas potentially based on forecasted PTALS's to encourage residents to utilise new and improved transport links. Also, there is a time lag between the grant of planning permission and the practical completion of schemes in any case by which time transport infrastructure is likely to have improved.	2/12/2021 11:13 AM
2	On Park East and Erith Park, the low levels of parking have been driven less by planning pressure to reduce parking and more by planning pressure to increase density	2/1/2021 4:34 PM

Appendix 6

AVISON YOUNG

Briefing Note

Outer London Parking Provision

1. Introduction

1.1 Avison Young has been instructed by the London Borough of Bexley to collect, tabulate and review relevant data from the Molior database from the last 5 years to inform parking management policy development within the Council's emerging Local Plan.

1.2 This briefing note should be read in conjunction with the data in the spreadsheet entitled 'Outer London Parking Provision Database 12-2-21'. The data focusses on developments within the London Borough of Bexley and selected developments from the London Boroughs of Bromley and Croydon. The analysis in this note is therefore based on these boroughs and whilst indicative of other outer London Boroughs we have not analysed these as part of this exercise.

2. Publication London Plan - Maximum Parking Standards

2.1 The PTAL rating of a development indicates is accessibility in terms of public transport. The higher the PTAL rating, the better located it is for these services. The table below indicates the different PTAL ratings and what they indicate:

Table 3.2 Sustainable residential quality (SRQ) density matrix (habitable rooms and dwellings per hectare)

Setting	Public Transport Accessibility Level (PTAL)	Setting	Public Transport Accessibility Level (PTAL)
	0 to 1	2 to 3	4 to 6
Suburban	150–200 hr/ha	150–250 hr/ha	200–350 hr/ha
3.8–4.6 hr/unit	35–55 u/ha	35–65 u/ha	45–90 u/ha
3.1–3.7 hr/unit	40–65 u/ha	40–80 u/ha	55–115 u/ha
2.7–3.0 hr/unit	50–75 u/ha	50–95 u/ha	70–130 u/ha
Urban	150–250 hr/ha	200–450 hr/ha	200–700 hr/ha
3.8 –4.6 hr/unit	35–65 u/ha	45–120 u/ha	45–185 u/ha
3.1–3.7 hr/unit	40–80 u/ha	55–145 u/ha	55–225 u/ha
2.7–3.0 hr/unit	50–95 u/ha	70–170 u/ha	70–260 u/ha
Central	150-300 hr/ha	300–650 hr/ha	650–1100 hr/ha
3.8–4.6 hr/unit	35–80 u/ha	65–170 u/ha	140–290 u/ha
3.1–3.7 hr/unit	40–100 u/ha	80–210 u/ha	175–355 u/ha
2.7–3.0 hr/unit	50–110 u/hr	100–240 u/ha	215–405 u/ha

2.2 The London Plan sets out maximum standards for parking for all residential development. This increases in areas with a low PTAL rating in outer London and is shown below.

Table 10.3 - Maximum residential parking standards

Location	**Maximum parking provision***
Central Activities Zone Inner London Opportunity Areas Metropolitan and Major Town Centres All areas of PTAL 5 – 6 Inner London PTAL 4	Car free~
Inner London PTAL 3	Up to 0.25 spaces per dwelling
Inner London PTAL 2 Outer London PTAL 4 Outer London Opportunity Areas	Up to 0.5 spaces per dwelling
Inner London PTAL 0 – 1 Outer London PTAL 3	Up to 0.75 spaces per dwelling
Outer London PTAL 2	Up to 1 space per dwelling
Outer London PTAL 0 – 1	Up to 1.5 spaces per dwelling ^

3. Delivery of Parking in Low PTAL Areas

3.1 The data we have collected details the developments in Bexley, Bromley and Croydon, their PTAL rating, number of bedrooms and number of parking spaces.

3.2 The general trend illustrated by the data is that residential developments in PTAL areas of 1 in the London Borough of Bexley are delivering 1.42 parking spaces per unit, approximately 5% below the maximum standard of 1.5 per unit. In PTAL areas of 2, this reduces to an average of 0.69 spaces per unit, 31% lower than the maximum standard of 1 per unit. This is a significant drop and can to some extent be explained by the number of 1 beds being delivered as part of the development. The developments in PTAL areas of 2 are delivering an average of 74% 2+ bed apartments, which compares to a percentage of 81% for PTAL areas of 1. When excluding the outlier of Wickham Grange this increases to 84% 2+ bed apartments for areas with a PTAL rating of 1. A greater sample size would improve the reliability of these findings and would be a useful next stage of the work.

3.3 The average parking provision in Bromley and Croydon is shown below.

	PTAL	Max Parking Standards	Average of Parking per unit
Bexley	1	1.5	1.42
	2	1	0.69
Bromley	1	1.5	1.55
	2	1	0.60
Croydon	1	1.5	0.58
	2	1	0.74

3.4 The table above indicates that despite developments being located in outer London with worse access to public transport, developers are not consistently meeting the maximum parking provision. The next section details some of the drivers behind these trends and the how the demand for housing is affected by the parking allocation.

4. Impact of Parking on Sales

4.1 We have assessed the quantitative data available both on Molior and on the individual planning applications of the developments studied. We have also undertaken primary research, speaking to local agents and marketing suites of each development.

4.2 The quantitative data taken from Molior regarding sales rates is not conclusive as to whether family units with parking below the average in low PTAL areas are taking longer to sell than family units which have parking at or above the average levels. For example, the Tower Hill development in Bexley which completed in Q1 2017 has a parking provision of 1.4 spaces per unit and a sales rate of 7.68 units per month. In comparison, the combined phases of the Quarry in Erith, which has a slightly higher average of 1.5 parking spaces per unit, indicates a lower sales rate of 5.5 per month. Both developments delivered 100% family housing (2 bed plus).

4.3 Sales rates depend on several factors such as the extent of marketing, location and general desirability of the development. Sales rates appear to vary with location, with Bexley on average achieving sales rates 5.25 units per month, compared to 1.65 units per month in Bromley and Croydon, although our sample size for Bromley and Croydon is much smaller. Therefore, the quantitative data includes too many variables to reach a conclusion about the specific impact of parking on rates of sale for new build developments.

4.4 However, further evidence can be sought from qualitative data from engagement with the marketing suites of the individual developments and discussions with local agents. The findings from our discussions are outlined below.

4.5 The Quarry in Erith is located in a PTAL area of 1 and has 1.5 parking spaces per unit, which is the maximum provision under the Publication London Plan. The majority of houses are allocated 2 parking spaces, with only a few having one space. All the apartments have one parking space. The marketing suite for the development reported the amount of car parking for the larger units was appealing, as the demand is mainly driven by families with children who require cars for shopping, taking children to school etc. The agent acknowledged this was particularly important for buyers, given the location of the development just outside the town centre.

4.6 The Eastside Quarter development in Bexley town centre is only offering a parking space with the 3-bedroom units. The lack of parking was reportedly not deterring buyers due to its town centre location and proximity to local amenities. In addition, typical buyers of the properties are from the local area who know where free parking is available nearby and so are not reliant on a specified parking space within the development. This is an important factor as the parking need in the area is demonstrably serviced by quieter roads near the development, reducing the burden on the developer to provide it. This factor is likely to be exclusive to outer London boroughs which benefit from free parking on residential roads given the lower density nature of the area. Although this development is located in a PTAL area of between 4-5, this highlights the differences in buyers' priorities in relation to location and parking.

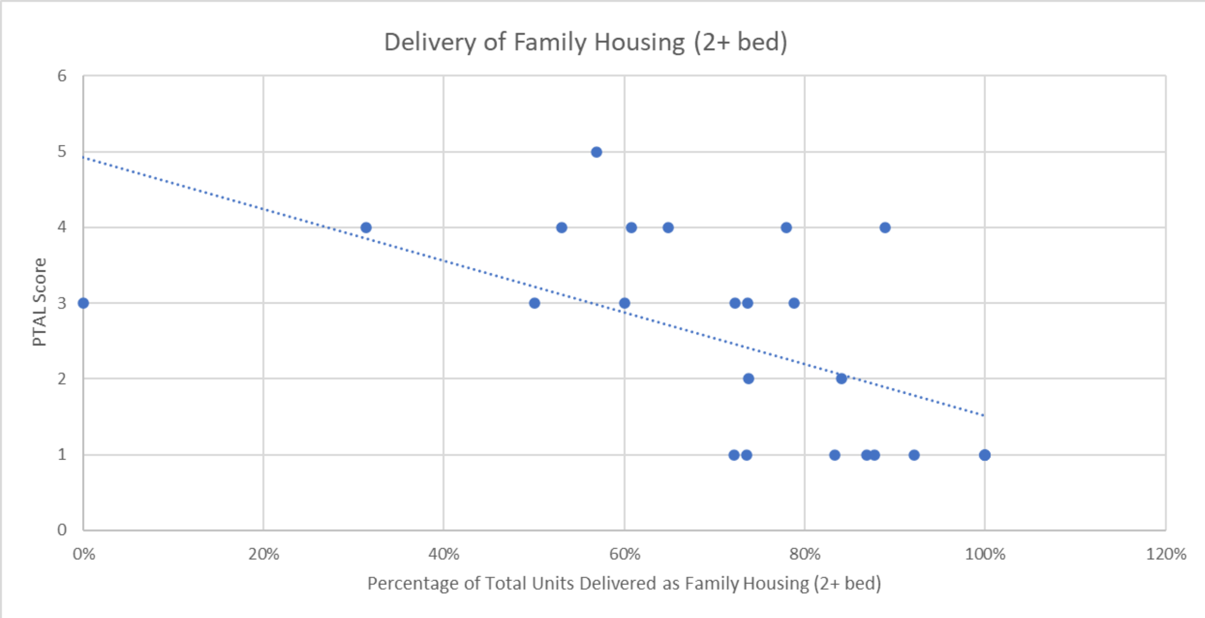
4.7 The Moat development at West Wickham is located in an area with a PTAL rating of 1. Although a significant proportion of the development comprises one bed apartments, the parking provision is one space per unit, which is lower than the maximum provision of 1.5. The marketing suite reported this was sufficient parking even for the 2 bedroom units due to the developments location on a road which was not restricted for parking, therefore overspill/ visitors parking could be fulfilled just outside the development.

4.8 The Lockesley Chase development, located in an area with a PTAL rating of 1, provides 1 parking space per unit for the apartments and 2 each for the 3 and 4 bed houses. This equates to parking per unit of 1.6, slightly over the maximum provisions in the publication London plan. Similarly, to the West Wickham development, just outside the main development on Locksley Drive, the road is very quiet with no parking restrictions. Therefore, although there are only 2 visitor spaces within the development, this has not been an issue for buyers. It is worth noting, the larger houses either have a car port or garage, as well as additional space in the drive. The properties with garages have been in high demand due to preferring to have the option of additional storage space.

4.9 In Croydon the Beulah Hill development has a PTAL rating of 2, and is providing 17 parking spaces for 33 units, equating to 0.52 spaces per unit. This is almost half the maximum provision for this PTAL zone. The marketing suite advised these would be allocated as one space per dwelling for the three and four bed properties, with some 2 bed units allocated a space. Although the scheme has not yet officially launched, the marketing suite reported there has been significant interest so far. Interested parties usually ask about parking, and the lack of parking provision for 1 and 2 bedrooms apartments has not been deterring buyers as they are usually young professionals or young couples who do not own a car. In relation to the larger family housing, the agent commented interested parties are usually local families with either one/two of the parents commuting into central London to work via public transport. In addition, buyers are familiar with the local area which has less parking restrictions compared to nearby areas, so if families have more than one car, they can utilise the local free parking.

5. Delivery of Family Housing in High PTAL Areas

5.1 The graph below shows data from residential developments over the last 5 years in the London Borough of Bexley, comprising the percentage of total units delivered as family housing and the PTAL rating for the development. The data shows the majority of developments delivering a high proportion of family housing units are at areas of low PTAL (0-2). The trendline indicates that developers are delivering less family units in areas of high PTAL (3-6). Although we cannot confirm this is entirely due to such units having restricted parking under the London Plan, we consider it a likely influencing factor.



6. Conclusions

6.1 Our research indicates that demand in outer London boroughs Bexley, Bromley and Croydon is largely from owner occupiers from the local area rather than investors. Generally, owner occupiers are more concerned with parking provision compared to investors, and this is particularly the case in areas of low PTAL rating which are less appealing to investors.

6.2 Car parking becomes a higher priority for larger units which are aimed at families, who need a car to transport children for school, shopping and for leisure activities. Tellingly, none of the developments within our study delivered 3 or 4-bedroom dwellings without an allocated parking space. Demand for large family units, even if the public transport access is reasonable, is likely to be significantly affected by the lack of available parking. This is supported by the advice we have been given from agents operating in the area who confirmed that 3 and 4 bed apartments/ houses generally take longer to sell if no parking is provided.

6.3 The developments we have looked at are in outer London and in areas of lower PTAL ratings. The urban form in these areas is naturally of lower density and quieter, with free parking more readily available on residential roads. This reduces the necessity for developers to deliver parking as buyers know they can park nearby even if they are not allocated a space.

6.4 The data collected indicates that developers are generally delivering fewer family units in areas with a higher PTAL rating. Whilst parking is one factor influencing this, it is not the only factor. Areas of higher PTAL rating are attractive to a younger demographic who prioritise access to public transport as well as a higher proportion of renters, who generally speaking have lower levels of car ownership.

			Unit Mix												
Outer London Borough	Developer	Development	1BF	2BF	3BF	4BF	2BH	3BH	4BH	5BH	Total	Number of 2 bed plus units	% of 2 bed plus units of total	Date of PP Grant	Date of completion
Bexley	Bellway	Land East Of Maiden Lane, Crayford Dartford Kent DA1 4LX		22			1	7	5		35	35	100%	10/03/2020	N/A
Bexley	BexleyCo	Old Farm Place	10	20			19	10	1		60	50	83%	25/05/2017	N/A
Bexley	Bellway	The Brackens (Hill View)	8	6			3	21	23		61	53	87%	28/02/2014	Q4 2016
Bexley	Barratt	Tower Hill (Bexley College)		93			8	91			192	192	100%	07/12/2012	Q1 2017
Bexley	The Anderson Group	The Quarry Erith - Phase 1		32	40				14		86	86	100%	31/03/2015	
Bexley	The Anderson Group	The Quarry Erith - Phase 2B		44				68	27		139	139	100%	15/12/2016	Dec-20
Bexley	Orbit	Erith Park - Phase 1	27	176			12	107	21		343	316	92%	13/12/2012	Nov-15
Bexley	Orbit	Erith Park - Phase 2	30	167	24			23			244	214	88%	26/02/2015	Jan-18
Bexley	Orbit	Park East (Arthur Street Estate)	89	207	24						320	231	72%	30/05/2019	N/A
Bexley	Abbey Developments	Egerton Place (Linpac) - Phases 1/2/3	89	75	152				20		336	247	74%	13/10/2016	N/A
Bromley	Regalpoint Homes (WW) Ltd	Wickham Grange (All Saints Catholic School)	68	10					24		102	34	33%	13/05/2016	N/A
Bromley	London Square	London Square Orpington (Bassetts House)	33	30	2			5	52	4	126	93	74%	02/06/2016	Q2 2020
Bromley	London Square	Hayes Court	1	7				1	14		23	22	96%	04/09/2014	Q3 2016
Bromley	Fernham Homes	Lockesley Chase (North Orpington Pumping Station)	4	8				14	9		35	31	89%	16/03/2017	N/A
Croydon	Brick by Brick (Croydon) Limited	Auckland Rise and Sylvan Hill	28	29							57	29	51%	24/05/2017	Jan-21
Croydon	Brick by Brick (Croydon) Limited	Warbank Crescent	15	21							36	21	58%	21/12/2016	N/A
Croydon	Quantum Group	2-5 Barrowsfield	5	14	14						33	28	85%	01/08/2019	N/A
Bexley	Orbit	Land At 156 - 168 West Street And 1-6 St Francis Road Erith Kent DA8 1AN	11	26	5						42	31	74%	08/11/2018	Jan-21
Bexley	Newhaven Construction	Junction Of Yarnton Way And Picardy Manorway, Belvedere	11	44	14						69	58	84%	19/12/2020	N/A
Bromley	LBB	Car Park - Burnt Ash Lane	10	15							25	15	60%	14/07/2020	N/A
Croydon	Brick by Brick (Croydon) Limited	Ravensdale & Rushden / Harold & Beulah Corner	1	14				13			28	27	96%	11/05/2017	N/A
Croydon	Bellway Homes South London	Ikon (Lombard House)	32	48	13	3					96	64	67%	25/06/2015	Q4 2019
Croydon		49-51 Beulah Hill	11	13	5	1		3			33	22	67%	30/11/2017	N/A
Bexley	Shanly Homes	Hillcross Place (Connect)	24	24							48	24	50%	08/11/2018	N/A
Bexley	Hill Residential Ltd	Park View (Carlton Training Centre And Hoblands)	10	13	1			8	6		38	28	74%	11/11/2016	Dec-15
Bexley	L&Q	Erith Riverside Baths (Erith Baths)									73	0	0%	28/01/2016	Jan-19
Bexley	LBB	Junction Of Macarthur Close And West Street	12	18							30	18	60%	27/02/2020	N/A
Bexley	Strand Construction And Development Ltd	Ballast Wharf	15	28	11						54	39	72%	26/11/2009	N/A
Bexley	Ash Properties	Domus Court, Crayford Road	7	21	5						33	26	79%	02/03/2017	N/A
Bexley	Shaviram Group	Sidcup House	35	16							51	16	31%	29/06/2015	Jan-17
Bexley	Coplan Estates	The Co-Operative Food, Station Road	13	41	5						59	46	78%	28/02/2019	N/A
Bexley	Montreaux	Former Lamorbey Swimming Centre	3	20	4						27	24	89%	23/01/2020	N/A
Bexley	Peabody	Abbey Wood - SE - Sedgemere	77	76	61	5					219	142	65%	22/12/2016	N/A
Bexley	Peabody	Abbey Wood - C/D1/D2 - Southmere Village	206	219	72	28					525	319	61%	25/10/2016	N/A
Bexley	Peabody	Former Harrow Inn PH	31	20	15						66	35	53%	27/02/2020	N/A
Bexley	Bellway Homes	Eastside Quarter (Bexley Civic Offices)	223	248	47						518	295	57%	14/06/2018	N/A

PTAL Score	Parking provision	Parking per unit	Max Parking	% Difference	Private Sales per month (from launch to final sale)
1	51	1.46	1.5	-2.9%	
1	122	2.03	1.5	26.2%	
1	115	1.89	1.5	20.4%	5.71
1	269	1.40	1.5	-7.1%	7.68
1	120.00	1.40	1.5	-7.5%	6.71
1	247	1.78	1.5	15.6%	4.20
1	304	0.89	1.5	-69.2%	11.00
1	258	1.06	1.5	-41.9%	3.50
1	262	0.82	1.5	-83.2%	
1	503	1.50	1.5	-0.2%	3.15
1	108	1.06	1.50	-41.7%	
1	177	1.40	1.50	-6.8%	1.35
1	48	2.09	1.50	28.1%	1.21
1	58	1.66	1.50	9.5%	
1	65	1.1	1.5	-31.5%	1.95
1	23	0.6	1.5	-134.8%	
1	26	0.8	1.5	-90.4%	
2	24	0.57	1	-75.0%	
2	56	0.81	1	-23.2%	
2	15	0.60	1.00	-66.7%	
2	33	1.18	1.00	15.2%	
2	50	0.52	1.00	-92.0%	2.1
2	17	0.5	1.00	-94.1%	
3	33	0.69	0.75	-9.1%	
3	49	1.29	0.75	41.8%	
3	43	0.59	0.75	-27.3%	
3	21	0.70	0.75	-7.1%	
3	48	0.89	0.75	15.6%	
3	29	0.88	0.75	14.7%	
4	30	0.59	0.50	15.0%	
4	17	0.29	0.50	-73.5%	
4	10	0.37	0.50	-35.0%	
4			0.50		
4	166	0.52	0.50	3.8%	
4	6	0.09	0.50	-450.0%	
5	212	0.41	0.50	-22.2%	

Comments
Delivered as 100% private
Sales data relates to Parcel 4 (47 of the 86 units). The remaining 39 were put on hold.
According to the PP, parking provision is lower than max standards due to site constraints and requirements to optimise residenital density. This scheme does not launch until spring 2021.
Phase 1 completed in Q3 2019, Phase 2 due to complete Q1 2021 and Phase 3 has not yet started.
Delivered as 100% affordable
Although historic PP it is due to launch Spring 2021
BTR scheme
Planning does not detail parking provision
The 6 parking spaces are disabled

100% intermediate sales
Launching soon

Erith Park Phase 2	
Sep-16	1
Oct-16	1
Nov-16	1
Dec-16	1
Jan-17	1
Feb-17	1
Mar-17	1
Apr-17	1
May-17	1
Jun-17	1
Jul-17	1
Aug-17	1
Sep-17	1
Oct-17	1
Total Months	14
Total Sales	49
Sales per month	3.5

Erith Park Phase 1	
Oct-14	1
Nov-14	1
Dec-14	1
Jan-15	1
Feb-15	1
Mar-15	1
Total Months	6
Total Sales	66
Sales per month	11

The Brackens Hill View	
Nov-15	1
Dec-15	1
Jan-16	1
Feb-16	1
Mar-16	1
Apr-16	1
May-16	1
Total Months	7
Total Sales	40
Sales per month	5.71

Tower Hill (Bexley College)	
Mar-15	1
Apr-15	1
May-15	1
Jun-15	1
Jul-15	1
Aug-15	1
Sep-15	1
Oct-15	1
Nov-15	1
Dec-15	1
Jan-16	1
Feb-16	1
Mar-16	1
Apr-16	1
May-16	1
Jun-16	1
Jul-16	1
Aug-16	1
Sep-16	1
Oct-16	1
Nov-16	1
Dec-16	1
Jan-17	1
Feb-17	1
Mar-17	1
Total Months	25
Total Sales	192
Sales per month	7.68

The Quarry - Phase 1 (PARCEL 4)	
Sep-17	1
Oct-17	1
Nov-17	1
Dec-17	1
Jan-18	1
Feb-18	1
Mar-18	1
Total Months	7
Total Sales	47
Sales per month	6.71

The Quarry - Phase 2	
Apr-18	1
May-18	1
Jun-18	1
Jul-18	1
Aug-18	1
Sep-18	1
Oct-18	1
Nov-18	1
Dec-18	1
Jan-19	1
Feb-19	1
Mar-19	1
Apr-19	1
May-19	1
Jun-19	1
Jul-19	1
Aug-19	1
Sep-19	1
Oct-19	1
Nov-19	1
Dec-19	1
Jan-20	1
Feb-20	1
Mar-20	1
Apr-20	1
May-20	1
Jun-20	1
Jul-20	1
Aug-20	1
Sep-20	1
Oct-20	1
Nov-20	1
Dec-20	1
Total Months	33
Total Sales	139
Sales per month	4.212

Egerton Place	
Jun-19	1
Jul-19	1
Aug-19	1
Sep-19	1
Oct-19	1
Nov-19	1
Dec-19	1
Jan-20	1
Feb-20	1
Mar-20	1
Apr-20	1
May-20	1
Jun-20	1
Jul-20	1
Aug-20	1
Sep-20	1
Oct-20	1
Nov-20	1
Dec-20	1
Total Months	19
Total Sales	60
Sales per month	3.157895

London Sq	
Mar-17	1
Apr-17	1
May-17	1
Jun-17	1
Jul-17	1
Aug-17	1
Sep-17	1
Oct-17	1
Nov-17	1
Dec-17	1
Jan-18	1
Feb-18	1
Mar-18	1
Apr-18	1
May-18	1
Jun-18	1
Jul-18	1
Aug-18	1
Sep-18	1
Oct-18	1
Nov-18	1
Dec-18	1
Jan-19	1
Feb-19	1
Mar-19	1
Apr-19	1
May-19	1
Jun-19	1
Jul-19	1
Aug-19	1
Sep-19	1
Oct-19	1
Nov-19	1
Dec-19	1
Jan-20	1
Feb-20	1
Mar-20	1
Apr-20	1
May-20	1
Jun-20	1
Total Months	103
Total Sales	139
Sales per mont	1.350

London sq - Hayes court	
Sep-15	1
Oct-15	1
Nov-15	1
Dec-15	1
Jan-16	1
Feb-16	1
Mar-16	1
Apr-16	1
May-16	1
Jun-16	1
Jul-16	1
Aug-16	1
Sep-16	1
Oct-16	1
Nov-16	1
Dec-16	1
Jan-17	1
Feb-17	1
Mar-17	1
Total Months	19
Total Sales	23
Sales per mont	1.211

Auckland Rise and Sylvan Hill	
Mar-19	1
Apr-19	1
May-19	1
Jun-19	1
Jul-19	1
Aug-19	1
Sep-19	1
Oct-19	1
Nov-19	1
Dec-19	1
Jan-20	1
Feb-20	1
Mar-20	1
Apr-20	1
May-20	1
Jun-20	1
Jul-20	1
Aug-20	1
Sep-20	1
Total Months	19
Total Sales	37
Sales per month	1.95

Ikon (Lombard House)	
Mar-18	1
Apr-18	1
May-18	1
Jun-18	1
Jul-18	1
Aug-18	1
Sep-18	1
Oct-18	1
Nov-18	1
Dec-18	1
Jan-19	1
Feb-19	1
Mar-19	1
Apr-19	1
May-19	1
Jun-19	1
Jul-19	1
Aug-19	1
Sep-19	1
Oct-19	1
Nov-19	1
Dec-19	1
Jan-20	1
Feb-20	1
Mar-20	1
Apr-20	1
May-20	1
Jun-20	1
Jul-20	1
Aug-20	1
Sep-20	1
Total Months	31
Total Sales	65
Sales per month	2.10