

## TRANSPORT FOR LONDON

### BRIEFING NOTE

**Subject: Car Park Tariff Revisions**

**Date: 7 August 2024**

<b>Manifesto commitment(s)</b>	<b>Mayor's Transport Strategy (MTS)</b>

## 1 Purpose

- 1.1 This briefing sets out our proposals to change the daily parking tariffs at the Places for London station car parks. Working with our operational partners, Saba Parking and PayByPhone, we have reviewed and benchmarked the proposals in line with market conditions at each car park location.
- 1.2 It is market practice for car park operators to review and implement tariff increases where appropriate on an annual basis.
- 1.3 The Deputy Mayor is asked to NOTE the briefing, and that the Chief Customer & Strategy Officer will be asked to take the decision on **Monday 12 August 2024** on the implementation of the car park tariff revisions for FY2024/25.

## 2 Background

- 2.1 The Places for London car park portfolio comprises 75 sites. Of these sites:
  - (a) 55 are London Underground car parks;
  - (b) 11 are London Overground car parks; and
  - (c) nine are Elizabeth line station car parks.
- 2.2 Seventeen car parks are located outside the extended Ultra Low Emission Zone (ULEZ). See Appendix A for map illustrating geographical distribution.
- 2.3 The 2024/25 budget for parking revenue is £17.4m. The portfolio as of 31 March 2024 is valued at £125m.
- 2.4 Across the portfolio, the average all-day charge for Monday to Friday is £5.84. The average all-day for Saturday is £3.56 and for Sunday is £2.85.
- 2.5 These rates and are significantly lower than comparable locations, largely as a result of annual increases not being implemented in recent years.
- 2.6 There have been three revisions to the car park tariffs since 2015:
  - (a) in 2015, the cash tariff was increased by an average of 2.5 per cent;



- (b) in 2017, cash and cashless tariffs increased by an average of 13.3 per cent and 9.7 per cent, respectively; and
  - (c) in 2019, we removed the separate cash and cashless tariffs, and we aligned tariffs to match local competitor pricing, resulting in an average increase of 6 per cent for weekday, 30 per cent for Saturday and 41 per cent for Sunday, equivalent to £0.34, £0.84, and £0.85 respectively. The tariff revision did not impact customer demand, and very little negative feedback was received.
- 2.7 A planned tariff revision in 2020 was postponed due to the pandemic, and there has been no further tariff revision since.
- 2.8 In January 2023, Saba Parking was awarded the contract to manage and maintain the car park portfolio for a period of five years. In parallel, PayByPhone was awarded the contract to provide the parking digital payment platform.
- 2.9 [REDACTED]
- 2.10 [REDACTED]
- 2.11 The analysis was used to recommend a new tariff for each car park (see Appendix B for a detailed list of changes for each car park).
- 2.12 There will be no change to the provision of free parking within Blue Badge bays.
- 2.13 Investment of £1m has already been made across the portfolio, including surface improvement works, installation of speed-prevention measures, better lighting and a successful trial of next-generation CCTV.
- 2.14 [REDACTED]
- 2.15 Investment of over [REDACTED] will be made in the portfolio through a major asset renewal programme that will upgrade infrastructure to deliver improved safety and customer service, operational cost savings and a significant reduction in carbon footprint.
- 2.16 A new project, 'Beyond Parking,' has also been launched to explore how we can create value (financial and non-financial) by reallocating unused parking bays to other uses to meet TfL and Places for London's priorities.
- 2.17 [REDACTED]



### 3 Delivering homes

- 3.1 The car park portfolio has been identified as an opportunity to deliver a significant number of homes as part of Places for London's wider housing delivery programme, with a project completed at Blackhorse Road (350 homes); work underway at Wembley Park (454 homes), Arnos Grove (162 homes) and Snaresbrook (74 homes); and future construction planned at Cockfosters (351 homes).
- 3.2 Currently, housing is also being considered at Mill Hill East, North Greenwich and Northwood.

### 4 Proposed tariffs

- 4.1 The proposal is to:
- (a) apply an uplift to each car park specific to the local market conditions;
  - (b) align pricing for stations within close proximity along a rail network; and
  - (c) introduce a minimum tariff of £5.00 for Saturdays and Sundays.
- 4.2 In total, all weekday and Sunday tariffs will rise, three Saturday tariffs will remain unchanged and one Saturday tariff will fall.
- 4.3 As a result:
- (a) the average weekday tariff will rise from £5.84 to £7.45, an increase of £1.61 (28 per cent);
  - (b) the average Saturday tariff will rise from £3.56 to £5.96, an increase of £2.40 (67 per cent); and
  - (c) the average Sunday tariff will rise from £2.85 to £5.72, an increase of £2.87 (101 per cent).
- 4.4 The highest weekday increase is at Croyley, which rises from £4.50 to £8.00, an increase of £3.50 (78 per cent). The highest Saturday increases are at Burnham, Hayes & Harlington and West Drayton, which rise from £2.50 to £7.00, an increase of £4.50 (180 per cent). The highest Sunday single increase is at North Greenwich, which rises from £7.50 to £15.00, an increase of £7.50 (100 per cent) reflecting the pricing at the adjoining car park used for The O2.
- 4.5 The higher uplifts are driven by sites with significant demand and high local comparable pricing, including where we have inherited sites with a very low legacy pricing structure.
- 4.6 After these tariff increases, there will still be 13 car parks where our charges are ostensibly lower (by an average of £1.24) than equivalent local car parks, though in these cases the local sites are primarily used for short-term stays.



- 4.7 Staff car parking remains unaffected. Dedicated staff car parks are not impacted, and operational staff who are permitted to park in station car parks under the Staff Parking Policy remain unaffected as they do not pay. Trade Unions have not been engaged, and frontline staff will be asked to direct any enquiries about the charges to TfL Customer Services.

## 5 Scale of change

- 5.1 Ultimately, we are bringing our car parking tariffs up to equivalent local levels after five years of no increase. The weekday increase is almost identical to what would have been the case had tariffs increased in line with inflation since 2019. The majority (60 per cent) of car park users park once a week, so the majority of customers will be paying an extra £1.61 a week – and all additional income will be re-invested into improving the transport network for Londoners.

	Average Tariff		Increase	
	Current	Proposed	Amount	%
Weekday	£5.84	£7.45	£1.61	28
Saturday	£3.56	£5.96	£2.40	67
Sunday	£2.85	£5.72	£2.87	101

- 5.2 Across the capital, the vast majority of our customers walk or take public transport to Tube stations. Indeed, London's poorest households are least likely to own a car. Of the households that earn less than £10,000, 78 per cent do not own a car, and 64 per cent of households that earn between £10,000 and £19,999 do not own a car.
- 5.3 The higher uplifts are driven by sites with significant demand and high local comparable pricing, such as North Greenwich where our car park is used by customers of The O2 as our car park is substantially less expensive. We have also regularised tariffs on recently adopted sites that had historic very low pricing, including Elizabeth line stations at Burnham, Hayes & Harlington, and West Drayton.
- 5.4 Blue Badge customers will continue to be able to park for free.
- 5.5 A copy of the draft Customer Equality Impact Assessment is attached in Appendix C.

## 6 Engagement

- 6.1 We have been liaising with TfL Press Office and are proposing to use the same approach as was used for the previous tariff uplift in 2019.
- 6.2 As in 2019, we have reactive lines if asked and we will monitor any local coverage. In 2019, aligning tariffs to match local competitor pricing did not impact customer demand and led to only one or two complaints or local press stories.
- 6.3 We have compiled a stakeholder list for each borough and will notify senior officers and elected officials ahead of the price increase.
- 6.4 The above approach is in line with how London boroughs communicate their annual tariff increases.



## 7 Implementation timeline

- 7.1 Our plan is to introduce the new tariff on 16 September 2024.
- 7.2 In order to deliver this, the following steps will be taken to notify customers and prepare our car parks for the increase:

12/08/2024	Approval to proceed with tariff uplift (TfL)
12/08/2024	Update Saba UK & Pay-by-Phone to proceed
19/08/2024	Saba UK to install information boards advising customers of the tariff uplift
13/09/2024	Saba UK commence signage upgrade
16/09/2024	Tariff Uplift Goes Live

## 8 Conclusion

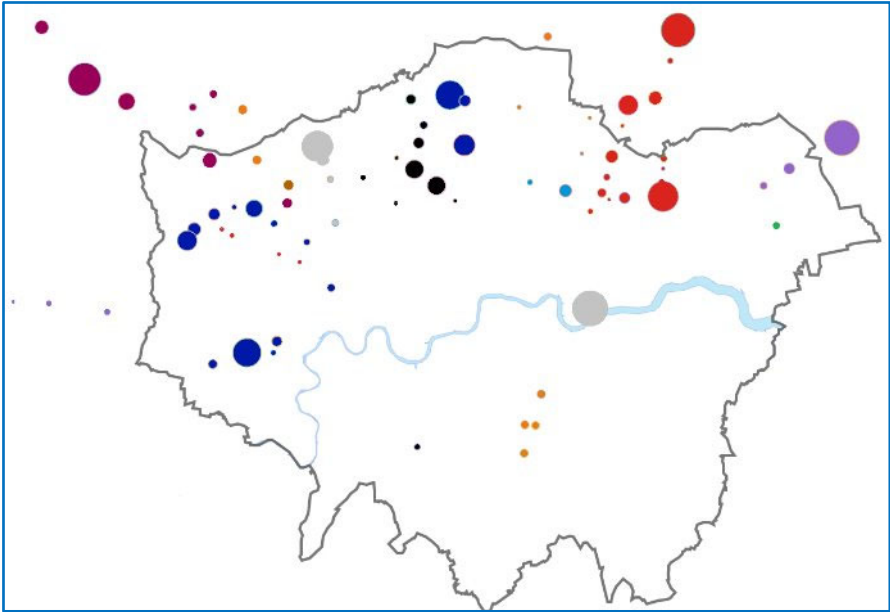
- 8.1 These tariff changes will generate up to an additional £4.68m revenue a year, though the current budget set within Places for London allows for a short-term fall in patronage. Based on previous tariff increases, we do not believe that there will a long-term reduction in patronage as a result of these tariff increases.
- 8.2 In any event, will leave open the option in the future to implement new tariff structures in line with Mayoral and TfL policies.

## 9 Appendices

- 9.1 Appendix A: Station Car Park Portfolios
- 9.2 Appendix B: Car park tariffs: current vs proposed and uplift values
- 9.3 Appendix C: Draft Customer Equality Impact Assessment



Appendix A – Station Car Park Portfolios



Legend	Central Line	Northern Line
	District Line	Piccadilly Line
	Jubilee Line	Elizabeth Line
	Metropolitan Line	London Overground



## Appendix B – Car park tariffs: current vs proposed and uplift values

2024	Current Tariff			Proposed New Tariffs			Tariff uplift value		
Car Park	Mon-Fri	Sat	Sun	Mon-Fri	Sat	Sun	Mon-Fri	Sat	Sun
Barkingside	£6.00	£6.00	£3.00	£7.00	£7.00	£5.00	£1.00	£1.00	£2.00
Brent Cross	£6.00	£6.00	£6.00	£7.00	£7.00	£7.00	£1.00	£1.00	£1.00
Brentwood	£6.00	£3.00	£3.00	£8.00	£5.00	£5.00	£2.00	£2.00	£2.00
Buckhurst Hill	£6.00	£6.00	£3.00	£7.00	£7.00	£5.00	£1.00	£1.00	£2.00
Burnham	£5.50	£2.50	£2.50	£7.00	£7.00	£5.00	£1.50	£4.50	£2.50
Bush Hill Park	£5.50	£2.50	£2.50	£7.00	£5.00	£5.00	£1.50	£2.50	£2.50
Bushey	£5.50	£2.50	£2.50	£7.00	£6.00	£6.00	£1.50	£3.50	£3.50
Canons Park	£6.00	£6.00	£3.00	£8.00	£7.00	£7.00	£2.00	£1.00	£4.00
Chalfont & Latimer	£6.00	£3.00	£3.00	£8.00	£6.00	£6.00	£2.00	£3.00	£3.00
Chesham	£5.00	£3.00	£3.00	£8.00	£6.00	£6.00	£3.00	£3.00	£3.00
Chingford	£6.50	£3.00	£2.00	£7.50	£5.00	£5.00	£1.00	£2.00	£3.00
Chorleywood	£5.50	£2.50	£2.50	£8.00	£6.00	£6.00	£2.50	£3.50	£3.50
Codfosters	£6.00	£6.00	£3.00	£8.00	£8.00	£7.00	£2.00	£2.00	£4.00
Croxley	£4.50	£2.50	£2.50	£8.00	£6.00	£6.00	£3.50	£3.50	£3.50
Crystal Palace	£4.00	£4.00	£4.00	£5.00	£5.00	£5.00	£1.00	£1.00	£1.00
Debden	£6.50	£2.50	£2.50	£8.00	£6.00	£6.00	£1.50	£3.50	£3.50
East Finchley	£6.50	£2.50	£2.50	£8.00	£5.00	£5.00	£1.50	£2.50	£2.50
Eastcote	£3.50	£2.50	£2.50	£5.00	£5.00	£5.00	£1.50	£2.50	£2.50
Epping	£7.50	£6.00	£6.00	£10.00	£8.00	£8.00	£2.50	£2.00	£2.00
Fairlop	£6.00	£3.00	£3.00	£7.00	£5.00	£5.00	£1.00	£2.00	£2.00
Finchley Central	£6.50	£2.50	£2.50	£8.00	£5.00	£5.00	£1.50	£2.50	£2.50
Forest Hill	£4.00	£4.00	£4.00	£6.00	£6.00	£6.00	£2.00	£2.00	£2.00
Gidea Park	£8.00	£3.00	£3.00	£9.00	£6.00	£6.00	£1.00	£3.00	£3.00
Greenford	£6.00	£2.00	£2.00	£7.00	£5.00	£5.00	£1.00	£3.00	£3.00
Hainault	£6.50	£3.00	£2.00	£7.00	£5.00	£5.00	£0.50	£2.00	£3.00
Harold Wood	£8.00	£3.00	£3.00	£9.00	£6.00	£6.00	£1.00	£3.00	£3.00
Harrow and Wealdstone	£7.00	£3.00	£3.00	£8.00	£6.00	£6.00	£1.00	£3.00	£3.00
Harrow-on-the-Hill	£6.00	£3.00	£3.00	£7.00	£5.00	£5.00	£1.00	£2.00	£2.00
Hatch End	£4.50	£4.50	£4.50	£5.00	£5.00	£5.00	£0.50	£0.50	£0.50
Hatton Cross	£13.00	£8.00	£8.00	£15.00	£10.00	£10.00	£2.00	£2.00	£2.00
Hayes and Harlington	£5.00	£2.50	£2.50	£7.00	£7.00	£5.00	£2.00	£4.50	£2.50
High Barnet	£6.50	£4.00	£3.00	£8.00	£6.00	£6.00	£1.50	£2.00	£3.00
Highams Park	£6.50	£2.50	£1.50	£7.50	£5.00	£5.00	£1.00	£2.50	£3.50
Highgate	£7.00	£3.00	£3.00	£8.00	£6.00	£6.00	£1.00	£3.00	£3.00
Hillingdon	£7.00	£3.00	£3.00	£8.00	£6.00	£6.00	£1.00	£3.00	£3.00
Hornchurch	£4.50	£2.00	£2.00	£5.00	£5.00	£5.00	£0.50	£3.00	£3.00
Hounslow East	£6.00	£6.00	£2.00	£7.00	£7.00	£5.00	£1.00	£1.00	£3.00
Hounslow West	£6.50	£0.00	£0.00	£7.00	£0.00	£0.00	£0.50	£0.00	£0.00



Ickenham	£5.50	£3.00	£3.00	£8.00	£6.00	£6.00	£2.50	£3.00	£3.00
Langley	£5.80	£3.50	£3.50	£7.00	£7.00	£5.00	£1.20	£3.50	£1.50
Leytonstone	£7.00	£3.00	£3.00	£8.00	£5.00	£5.00	£1.00	£2.00	£2.00
Loughton	£6.00	£3.00	£3.00	£8.00	£6.00	£6.00	£2.00	£3.00	£3.00
Mill Hill East	£5.50	£2.00	£2.00	£8.00	£5.00	£5.00	£2.50	£3.00	£3.00
Moor Park	£6.50	£2.00	£1.50	£8.00	£6.00	£6.00	£1.50	£4.00	£4.50
Morden	£5.00	£2.00	£2.00	£7.00	£6.00	£6.00	£2.00	£4.00	£4.00
Newbury Park	£6.00	£3.00	£2.00	£7.00	£5.00	£5.00	£1.00	£2.00	£3.00
North Ealing	£4.50	£2.00	£1.50	£5.00	£5.00	£5.00	£0.50	£3.00	£3.50
North Greenwich	£12.50	£12.50	£7.50	£15.00	£15.00	£15.00	£2.50	£2.50	£7.50
Northwood	£5.50	£3.00	£2.00	£8.00	£6.00	£6.00	£2.50	£3.00	£4.00
Norwood Junction	£4.00	£4.00	£4.00	£6.00	£6.00	£6.00	£2.00	£2.00	£2.00
Oakwood	£6.50	£6.00	£5.00	£8.00	£8.00	£7.00	£1.50	£2.00	£2.00
Osterley	£7.00	£4.00	£2.00	£8.00	£5.00	£5.00	£1.00	£1.00	£3.00
Penge West	£4.00	£4.00	£4.00	£5.00	£5.00	£5.00	£1.00	£1.00	£1.00
Perivale	£4.50	£2.00	£1.50	£7.00	£5.00	£5.00	£2.50	£3.00	£3.50
Queensbury	£6.00	£3.00	£2.00	£7.00	£5.00	£5.00	£1.00	£2.00	£3.00
Rayners Lane	£4.00	£2.50	£1.50	£6.00	£5.00	£5.00	£2.00	£2.50	£3.50
Redbridge	£6.00	£6.00	£3.00	£7.00	£5.00	£5.00	£1.00	£-1.00	£2.00
Ruislip	£4.00	£2.50	£1.50	£6.00	£5.00	£5.00	£2.00	£2.50	£3.50
Ruislip Gardens	£4.00	£2.00	£1.50	£6.00	£5.00	£5.00	£2.00	£3.00	£3.50
South Harrow	£4.00	£2.00	£1.50	£6.00	£5.00	£5.00	£2.00	£3.00	£3.50
South Ruislip	£5.00	£5.00	£2.00	£6.00	£5.00	£5.00	£1.00	£0.00	£3.00
South Woodford	£6.50	£2.50	£2.00	£8.00	£6.00	£6.00	£1.50	£3.50	£4.00
Stanmore	£6.00	£6.00	£6.00	£9.00	£8.00	£8.00	£3.00	£2.00	£2.00
Sudbury Town	£4.00	£2.00	£1.50	£6.00	£5.00	£5.00	£2.00	£3.00	£3.50
Taplow	£4.50	£2.70	£2.70	£7.00	£7.00	£5.00	£2.50	£4.30	£2.30
Theobalds Grove	£4.00	£2.00	£1.00	£6.00	£5.00	£5.00	£2.00	£3.00	£4.00
Theydon Bois	£6.00	£6.00	£3.00	£8.00	£6.00	£6.00	£2.00	£0.00	£3.00
Tott & Whetstone	£6.00	£3.00	£2.00	£8.00	£5.00	£5.00	£2.00	£2.00	£3.00
Turkey Street	£5.50	£2.80	£1.70	£6.50	£5.00	£5.00	£1.00	£2.20	£3.30
Walthamstow Central	£7.00	£3.00	£3.00	£8.00	£6.00	£6.00	£1.00	£3.00	£3.00
Wanstead	£6.00	£3.00	£3.00	£7.00	£5.00	£5.00	£1.00	£2.00	£2.00
Watford	£5.00	£3.00	£3.00	£8.00	£6.00	£6.00	£3.00	£3.00	£3.00
West Drayton	£4.00	£2.50	£2.50	£7.00	£7.00	£5.00	£3.00	£4.50	£2.50
Woodford	£6.00	£6.00	£3.00	£8.00	£6.00	£6.00	£2.00	£0.00	£3.00
Woodside Park	£6.00	£3.00	£2.00	£8.00	£5.00	£5.00	£2.00	£2.00	£3.00

\* Hounslow West closed on Saturday & Sundays

