

Pulborough Station

Rail car park demand – report update



A report for Stonewater and Network Rail

October 2025

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1 Executive Summary

- Network Rail has been working with Stonewater Developments to deliver housing in the vicinity of Pulborough railway station. The current station car parks provide 159 spaces on the east of the railway adjacent to the station entrance. Before the pandemic it was intended to provide additional parking on the west of the railway and create a new entrance. However there has been a reduction in rail demand post-Covid and car park demand is also lower.
- Richard Talbot Consultancy (RTC), a specialist in station access and car parking produced reports for Network Rail in 2019, 2022 and October 2023. These reports provided analysis of rail and car park demand. The latest report concluded that there was no business case for the construction of the new car park on the west side. The October 2023 report is provided as an Appendix to this updated report as supporting evidence.
- Given that rail demand continues to recover, RTC has been commissioned by Stonewater to provide updated research. This report consists of analysis of a 5 month period from March to July 2025 of car park ANPR entry and exit data and observations from a site visit in July 2025. It also includes a large scale series of occupancy counts undertaken by APCOA the car park management contractor.
- Rail demand at Pulborough has recovered to around 84% of its pre-Covid level. Future growth of 49.4% is forecast (as a Central Case) by Network Rail to 2050. This is slightly higher than previous growth forecasts.
- Analysis of manual count data and ANPR entry / exit data shows lower occupancy over the period studied than in 2023. Some of this is accounted for by seasonal variations. The period from March to July typically features lower demand than October (the period studied in 2023). However, it is clear that there has been no growth in car park usage that would justify the investment in the west car park. An occupancy count in July 2025 by RTC showed identical occupancy to that gathered by APCOA.
- **Average** midweek demand, applying the Network Rail Central case future growth, does not exceed 159 spaces by 2050, whereas **maximum** demand will be reached on some midweek days in peak months by the late 2020s. However, the data suggests that this will be infrequent. There remains therefore no business case to support investment in additional long stay car parking on the west of the station.
- Pre-Covid car parks reached high / full occupancy, there was no firm evidence of rail demand suppression as a result, instead passengers switched mode (primarily to kiss & ride / drop & go at most stations). This would be likely to happen again if car parking became unavailable at high peak demand periods. However, the more recent rise of Uber and the future potential of micro-mobility, present wider mode shift possibilities. These have their own implications for Pulborough, such as the potential for increased drop & go and the need to provide adequate capacity in the right location that does not impact on the station forecourt and approach road to an unacceptable level. The provision of a new forecourt area on the west side of the station would support this if funding were available.
- In summary, this report concludes that the 2023 report findings remain valid. There is no justification for the investment in the additional car park facility. Stonewater and Network Rail should therefore determine what other interventions, if any, are required on the west side of the railway to support the housing development. The restriction of vehicles parking on Stopham Road should remain an aspiration.

2 Background

2.1 General

Network Rail has been working with Stonewater, a developer, to support provision of housing to the west of Pulborough station. The planning permission requires the construction of a car park between the new housing the station, with a new western entrance.

Pre-pandemic, it was considered likely that the new facility would be at high levels of occupancy from construction, due to the existing car park, operated by APCOA on behalf of Govia Thameslink Railway (GTR), being typically close to full occupancy most weekdays and there being additional vehicles parked on the roadway, which would be prohibited post-development and would revert to the new car park.

A report by Richard Talbot Consultancy (RTC a specialist rail station access and car parking consultancy) in May 2022, considered post-Covid changes in demand and the usage at the time of the report, this included some high level outputs from the automatic numberplate recognition (ANPR) system in use at the GTR car park, with a midweek average of 47% occupancy and all week average of 40%, with a maximum occupancy of 65%.

A further RTC report in November 2023 updated occupancy analysis using ANPR data and site visit observations. The report concluded that car park occupancy had slightly increased, but was still only at 57% weekday average occupancy with a maximum of 85%. The report included a revenue model that demonstrated the lack of a business case for a new car park to be constructed on the west of the railway. It recommended safeguarding some land for potential future development and also the consideration of an alternative concept of a new entrance, forecourt and reduced area of primarily Blue Badge, and short stay car parking if this could be funded, for example from further land development.

Stonewater has commissioned an update of the report and therefore a further 5 months of ANPR data as well as a series of occupancy snapshots has been obtained from GTR and its car park management contractor APCOA. A site visit was undertaken in July and this report combines these data sources. This report provides for an update of rail demand, future growth and how this applies to future car park demand.

3 Rail demand

3.1 Pulborough station demand

3.1.1 ORR entry / exit data

The Office of Rail and Road (ORR) publishes usage data at station level each year, around 8 months after the end of the financial year concerned. The latest data for Pulborough, covering 2024/25¹ shows annual entries of 159,067. As shown in the chart below this remains below the rail industry base year level of pre-Covid demand in 2018/19 of 189,368, a recovery of 84%. This is broadly consistent with other GB stations that had significant proportions of commuting and / or business travel pre-Covid.

Growth of 4.7% in 2024/25 is relatively low compared to many other stations recently studied. Stations that have a significant component of leisure related travel demand have been growing more strongly than those that have primarily employment related trips, including Pulborough.

¹ Data for 2024/25 will not be published until November 2025. The last year is provided by Network Rail and taken from the MOIRA system which uses the same data sources.

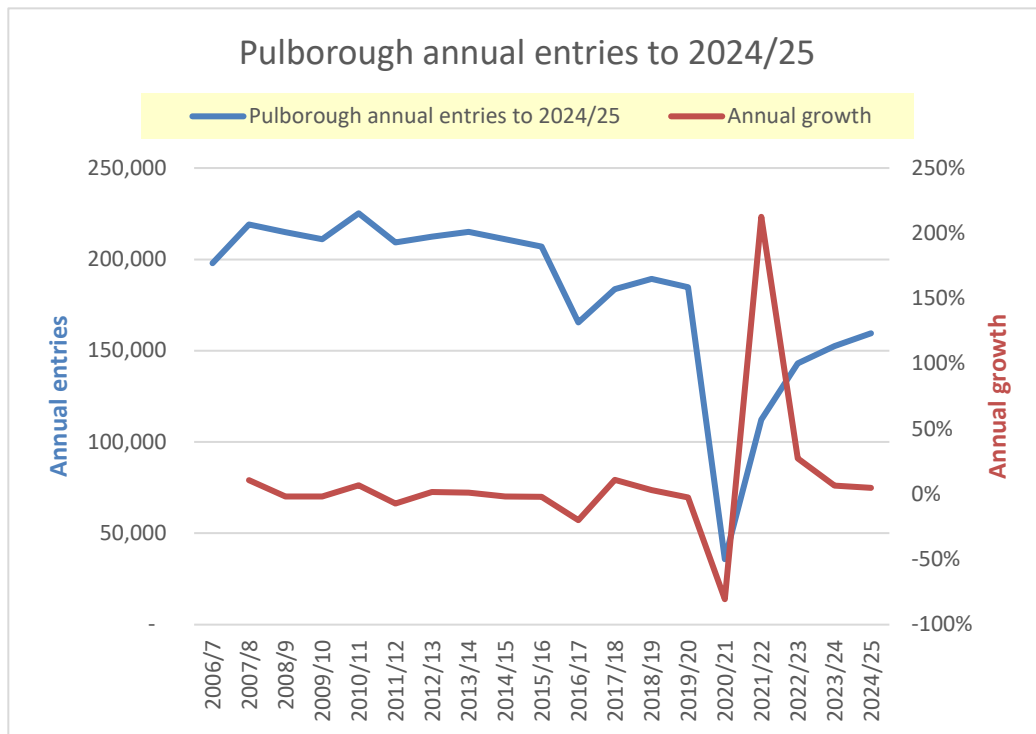


Figure 1. Pulborough annual entries / exits (ORR)

However it is worth noting that the peak year of rail demand at Pulborough was not 2018/19 as at most stations, but 2010/11 when annual entries were 225,247. There was a significant decline in usage during industrial action related disruption, with a 20% decline in 2016/17, only partially recovered in the following years. It is possible that passengers originating from areas to the west of the station began using Haslemere instead of Pulborough – a car park deck opened at Haslemere in 2016 providing additional capacity and journey times to London are significantly faster than from Pulborough with the fastest London journeys of around 54 minutes compared to 1 hour 20 minutes from Pulborough.

3.1.2 Relationship between rail demand and car park occupancy

The October 2023 RTC also reported changes in rail destinations since Covid and concluded that the data showed ‘... *significant reductions in the proportion of London trips and further increases in more local trips, particularly to Horsham, Billingshurst and Chichester. These local trips are less likely to be car dependent than London trips*’.

There is further evidence of a weakening of the previous relationship between rail demand and car park occupancy since the pandemic. A series of Station Travel Plans covering the adjacent train operator South Western Railway showed a mode shift from car parked at or near the station to drop & go. This is likely due to the greater availability of cars to drop a family member off as people who would have formerly driven to workplaces are now working at home for some days of the week. An additional factor may be price sensitivity due to cost of living pressures where it is preferred to be dropped off at the station rather than pay the car park tariff.

3.2 Future growth

Network Rail forecasts growth for Pulborough against 2023/24 to 2045 as shown in the chart below on a Low / Central / High case basis. This ranges from 22.5% in the Low case, to 49.4% in the Central case and 85.4% in the High case.

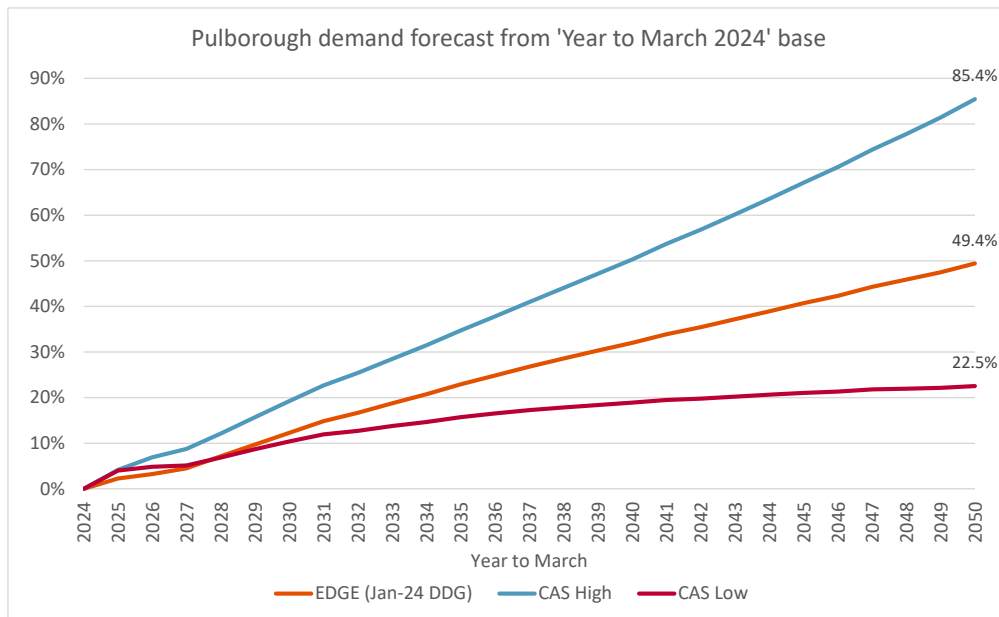


Figure 2. Pulborough forecast growth

These forecasts are based on exogenous inputs (population, GDP and employment) and also assumptions around rail fares. They do not include any impacts of rail investment schemes or timetable changes. However, there are no known specific rail improvement schemes that would impact growth in demand at Pulborough

Forecasts also do not take into account potential interruption in demand by unforeseen events, such as recessions or pandemics, or positively by impacts such as increases in motoring costs.

The Network Rail Central case forecast growth rates have been used in the future car park demand assumptions in this report. When applied to the 2023/24 ORR entries, the Central case shows the maximum pre-Covid demand (2010/11) being reached in around 2046 at Pulborough as shown in the chart below. The 2018/19 rail industry base case year of 189,368 entries is forecast for 2035/36.

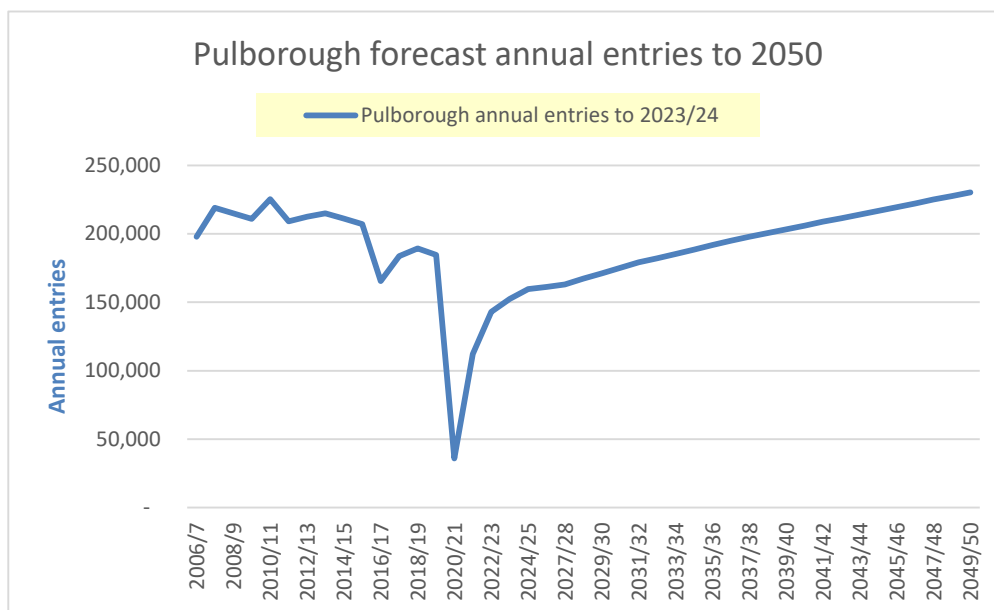


Figure 3. Pulborough forecast annual entries to 2050

In summary, growth in rail demand at Pulborough has been weaker than at other stations since well before the pandemic. Whilst it has subsequently recovered broadly in line with other stations that had predominantly commuter usage, it remains well below its highest pre-Covid levels of demand.

The Central Case future growth forecasts provided by Network Rail are slightly higher than the 'medium' Covid recovery future demand described in the October 2023 report. These have been applied to the occupancy data to give a revised future forecast of car park maximum and average demand, described in Section 4 below.

4 Pulborough station car parking

4.1 Capacity

As described in previous RTC reports, Pulborough has two station car parks a lower 'left' parking area consisting of 52 spaces and an upper 'right' parking area consisting of 107 spaces, providing for total capacity of 159. The images below are from the site visit undertaken by RTC on Thursday 24 July. As during previous site visits, the lower 'left' car park was at higher occupancy than the upper 'right' car park. This is likely because it is the first parking area that motorists encounter when entering via the approach road. This was full with 52 cars, including both Blue Badge spaces occupied by vehicles correctly displaying a Blue Badge.

The upper 'right' car park had 39 vehicles therefore a combined 91 vehicles provided for overall occupancy of 57.2%. This is consistent with the data provided by APCOA analysed in the following sections of this report.

As previously seen, it is the long stretches of parking to the rear of the upper car park that are at much lower levels of occupancy than the areas of parking closer to the station entrance.



Figure 4. Upper 'right' car park rear area



Figure 5. Upper 'right' car park central area



Figure 6. Lower 'left' car park

Previous reports have also noted that the area of roadway to the west of the rail over road bridge where Stopham Road becomes Station Road are used for parking very likely connected to station use. The images below are from the site visit of Thursday 24 July 2025.



Figure 7. Stopham Road looking east



Figure 8. Stopham Road looking west

22 vehicles were observed parking the roadway, slightly lower than on previous visits. Previous RTC reports have noted the unsuitability of this area for parking, particularly due to the lack of a safe pedestrian route to the station. It is to be hoped that the intention remains to restrict this parking in future.

4.2 Car park occupancy

4.2.1 Occupancy counts

GTR's car park management contractor APCOA has provided a series of manual occupancy counts undertaken by its staff. These are shown in the table below (the full table of 2025 counts is provided as Appendix A). The equivalent 2023 values are provided in the table for comparison.

Day	Counts	2025 Average	2025 Maximum	2023 average	2023 Maximum
Monday	12	42%	51%	46%	52%
Tuesday	19	62%	82%	68%	77%
Wednesday	4	61%	66%	71%	85%
Thursday	20	56%	75%	60%	75%
Friday	15	33%	46%	40%	46%
Total	70	51%		57%	

Table 1. Occupancy count summary

Average weekday demand is 51% from these counts, with a higher midweek average of 60%. The maximum occupancies recorded by APCOA were 82% on Tuesday 29 April and 75% on Thursday 10 June. These higher occupancy days were relatively infrequent. The 2023 values are all higher than those for 2023. This is likely due to the time of year where the 2025 values are from March to July, whereas the 2023 values are from October. Car park demand in the October period is usually slightly higher than those for earlier in the year. This is typically a ratio of around 1.1 so that October car park occupancies might be around 10% higher than across the March to July period.

The 2023 RTC also noted that future car park occupancy would be influenced by factors such as:

'Whether commuting will continue in its current trends of midweek working, with a range of c.2.5-3.5 days per week in a workplace for those who are able to work from home?

Whether employers will successfully encourage a return towards the average c.4.5 days per week in offices that was the case before the pandemic?'

It is clear from the latest occupancy data that the midweek concentration of demand has not shifted in favour of wider all weekday usage and the people working from home continue to do so disproportionately on Monday and Friday. This further weakens the business case for car park investment as newly created spaces would only be occupied for a 1-3 days a week on the busiest months of the year.

4.2.2 Average and maximum occupancy

Average car park occupancy is important as this drives car park revenue (and therefore the business case for the additional car park construction). However, particularly from a train operator perspective, maximum occupancy is also important, since if the car park reaches full occupancy even on rare occasions, there is the potential for both loss of car park revenue and also suppression of rail demand. The table below shows the ratios between average and maximum occupancies across the 2023 and 2025 data.

2023 Average to Maximum	2025 Average to Maximum
1.13	1.22
1.13	1.32
1.20	1.33
1.25	1.38
1.15	1.07

Table 2. Average to maximum parking ratios

This data shows a generally higher ratio of maximum to average occupancy in 2025 compared to 2023. This means that the higher occupancies were on fewer occasions and supports the conclusion above that the October period is generally busier than the March to July period that is covered by the 2025 data.

4.2.3 ANPR data

Entry and exit records were provided for the 'left' and 'right' car parks for a 5 month period from 1 March 2025 to 31 July 2025. There were some technical issues with this data, specifically:

- The 'left' exit camera was not functioning correctly across most of the period and missed a large proportion of vehicle exits.
- As in the previous 2023 data analysis, there was a significant proportion of 'unknown' reads, where the ANPR cameras detected a vehicle but were unable to determine whether it was entering or leaving the car park – for the 2025 data this was only the 'right' car park (strongly indicating that in the 2023 data the 'unknown' plate reads for the 'left' car park were all associated with exits. As with the 2023 data the 'unknown' plate reads were around 8%. This is a function of the difficulties in the layout of the site in positioning ANPR cameras.
- There was a large spike in entries on 16 May 2025, likely also due to a camera fault for the 'right' car park, probably capturing all vehicle movements in and out of the forecourt and the adjacent roadway leading to the adjacent industrial premises. This was quickly rectified.
- Additionally, the number of entries and exits in the morning peak and early off peak period indicate that vehicles are entering the field of the ANPR capture camera in the 'right' car park to drop passengers off. This likely shows that the forecourt capacity (outside the field of the cameras) is insufficient to facilitate all drop off events.

After discussion with APCOA adjustments were made to the data to provide an estimated average car park demand across the period, shown in the table below and is broadly consistent with the manual occupancy counts.

Day	Entry
Sunday	45
Monday	76
Tuesday	97
Wednesday	99
Thursday	107
Friday	111
Saturday	66

Table 3. ANPR average net entries by day

However, given the range of occupancy counts undertaken by APCOA across the period and the technical issues with the ANPR system, it is reasonable to conclude that the manual occupancy is the most appropriate indicator of car park usage.

4.3 Impact of future growth

As noted in Section 3 above, the NR Central Case future demand forecast is slightly higher than the previous DfT Medium Covid recovery forecasts. These forecasts have therefore been applied to the occupancy data analysed for this report, with a 10% contingency reflecting the seasonal variation between the March to July and the October data. This is shown in the table below.

Network Rail 'Central Case' forecast										
Year to April	2026	2027	2027	2028	2028	2029	2029			
Maximum	143	144	146	150	153	157	161			
Weekday average	89	90	91	94	96	98	100			
Midweek average	105	106	107	110	113	115	118			
Year to April	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039
Maximum	164	168	172	175	178	181	184	187	190	193
Weekday average	103	105	107	109	111	113	115	117	119	120
All week average	121	124	126	128	131	133	135	137	139	141
Year to April	2040	2041	2042	2043	2044	2045	2046	2047	2048	2049
Maximum	195	198	201	203	206	208	211	213	216	219
Weekday average	122	123	125	127	128	130	132	133	135	136
All week average	143	145	147	149	151	153	155	157	159	160

Table 4. Future car park demand forecast

As was the case in the 2023 report, there is a potential for occasional maximum occupancy to be reached from the late 2020s (likely only in the very busiest months of the year such as October / November and February). The 2023 report noted that the historic response to these occasions is for a mode switch primarily to kiss and ride. There is an additional trend at many stations studied for increased access by taxi, particularly where app-based private hire services such as Uber exist (as they do across West Sussex). The likelihood of suppression of rail demand through lack of car park capacity therefore remains low and limited to a few midweek days on the busiest periods of the year.

The business case for the additional car park at Pulborough is entirely undermined as the all week average (that drives car park revenue and therefore a return on investment) does not reach the existing capacity until late in the 2040s.

4.4 Summary and conclusion of car park data

- The occupancy of the car parks has not materially changed since the 2023 RTC report.
- Whilst the occupancy in 2025 is consistently lower across each day of the week than 2023, this is due to seasonality, as the 2023 data covered October, the busiest period of the year.
- The 2023 report demonstrated that the existing capacity at Pulborough was sufficient to accommodate rail demand well into the future. This remains the case.
- There is no business case to support investment into additional car park capacity at the station.

5 Appendix A – full occupancy counts

Date	Day	Standard Bays	Occupancy
03/03/2025	Monday	75	47%
04/03/2025	Tuesday	129	81%
06/03/2025	Thursday	109	69%
07/03/2025	Friday	53	33%
10/03/2025	Monday	76	48%
11/03/2025	Tuesday	107	67%
13/03/2025	Thursday	100	63%
14/03/2025	Friday	46	29%
17/03/2025	Monday	67	42%
18/03/2025	Tuesday	123	77%
20/03/2025	Thursday	118	74%
21/03/2025	Friday	61	38%
24/03/2025	Monday	81	51%
25/03/2025	Tuesday	109	69%
27/03/2025	Thursday	44	28%
28/03/2025	Friday	50	31%
31/03/2025	Monday	70	44%
01/04/2025	Tuesday	106	67%
03/04/2025	Thursday	99	62%
04/04/2025	Friday	53	33%
07/04/2025	Monday	66	42%
08/04/2025	Tuesday	100	63%
10/04/2025	Thursday	85	53%
11/04/2025	Friday	36	23%
15/04/2025	Tuesday	82	52%
17/04/2025	Thursday	67	42%
23/04/2025	Wednesday	88	55%
24/04/2025	Thursday	106	67%
25/04/2025	Friday	73	46%
29/04/2025	Tuesday	130	82%
01/05/2025	Thursday	101	64%
02/05/2025	Friday	40	25%
08/05/2025	Thursday	92	58%
09/05/2025	Friday	63	40%
13/05/2025	Tuesday	44	28%
15/05/2025	Thursday	78	49%
16/05/2025	Friday	57	36%
19/05/2025	Monday	68	43%
20/05/2025	Tuesday	90	57%
22/05/2025	Thursday	99	62%
28/05/2025	Wednesday	97	61%
29/05/2025	Thursday	101	64%
30/05/2025	Friday	57	36%

02/06/2025	Monday	57	36%
03/06/2025	Tuesday	89	56%
05/06/2025	Thursday	45	28%
06/06/2025	Friday	51	32%
10/06/2025	Tuesday	119	75%
11/06/2025	Wednesday	101	64%
12/06/2025	Thursday	119	75%
16/06/2025	Monday	76	48%
17/06/2025	Tuesday	94	59%
19/06/2025	Thursday	88	55%
24/06/2025	Tuesday	102	64%
25/06/2025	Wednesday	105	66%
26/06/2025	Thursday	110	69%
27/06/2025	Friday	55	35%
30/06/2025	Monday	55	35%
01/07/2025	Tuesday	87	55%
03/07/2025	Thursday	90	57%
08/07/2025	Tuesday	114	72%
11/07/2025	Friday	62	39%
14/07/2025	Monday	56	35%
15/07/2025	Tuesday	93	58%
17/07/2025	Thursday	75	47%
22/07/2025	Tuesday	90	57%
25/07/2025	Friday	36	23%
28/07/2025	Monday	53	33%
29/07/2025	Tuesday	68	43%
31/07/2025	Thursday	70	44%

Table 5. Manual occupancy counts

6 Appendix B – RTC October 2023 report



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9 November 2023

Rail car parking demand at Pulborough



A report for Network Rail

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1 Executive Summary

- Pulborough railway station is a small / medium sized commuter station that was used by c. 600 passengers per day on average before the Covid pandemic. It is owned by Network Rail and operated by Southern, part of the Govia Thameslink Railway (GTR) DfT National Rail Contract. For several years Network Rail has been working with a developer to facilitate a residential development scheme to the west of the station. The planning permission for the development currently includes the construction of a car park between the new housing the station, with a new western entrance.
- A report in early 2019 by Richard Talbot Consultancy (RTC) provided the background to rail parking, estimated demand and issues that were expected to impact on future demand according to data available at the time, showing a strong case for the car park.
- A further review in May 2022 noted the major impact on rail demand due to the Covid-19 pandemic and the consequently weaker case for the car park. Since this time, construction costs for the car park scheme have significantly increased. This report considered the standalone case for the second car park as operated separately by Network Rail, acknowledging that elements of the revenue generated would be abstracted from the existing GTR car park.
- More recently, GTR and its car park management company APCOA have been reporting relatively weak occupancy in the existing car park. In response to these factors, this October 2023 further report provides an update using detailed data from the automatic number plate recognition (ANPR) system in use at the car park, as well as updated rail demand and future forecasting data provided by Network Rail, and observations from a site visit in October 2023.
- The ANPR system data was provided for a 4 week period from 5 October to 2 November 2023. This data is subject to a small error margin as 5%-8% of data records are categorised as unknown. However, an adjustment has been made to these records to enable a robust calculation of occupancy to be derived. Average all week occupancy was 57% with a maximum occupancy observed on the highest single day (18 October) of 85%.
- Future growth scenarios as provided by Network Rail were applied to the occupancy, these show occasional demand beyond the existing capacity of 159 spaces starting in the late 2020s. However, a new revenue model created for this report shows the total incremental revenue this would generate is substantially below that required to justify the capital cost. Therefore, on a whole industry approach, the second car park does not currently have a business case.
- It is recommended that the new car park is not progressed towards delivery. However, the land might be safeguarded to allow future development of parking if future demand changes are sufficient to improve the business case.
- Alternatively, a reconfiguration of the land to allow a new entrance, forecourt and much reduced area of parking (e.g. primarily Blue Badge, short stay and a small amount of additional standard parking) might be provided if it enabled the remaining land to be developed for residential units, thus providing a capital receipt that would fund the new entrance and forecourt. It is not known whether this is either feasible from a cost delivery perspective or would be permissible to the Local Planning Authority, so is presented only as an alternative concept.

2 Background

Network Rail has been working with a developer to support provision of housing to the west of Pulborough station. The planning permission requires the construction of a car park between the new housing the station, with a new western entrance.

Pre-pandemic, it was considered likely that the new facility would be at high levels of occupancy from construction, due to the existing car park, operated by APCOA on behalf of Govia Thameslink Railway (GTR) being typically close to full occupancy most weekdays and there being additional vehicles parked on the roadway, which would be prohibited post-development and would revert to the new car park.

A report by Richard Talbot Consultancy (RTC) in May 2022, considered post-Covid changes in demand and the usage at the time of the report, this included some high level outputs from the automatic numberplate recognition (ANPR) system in use at the GTR car park, with a midweek average of 47% occupancy and all week average of 40%, with a maximum occupancy of 65%.

Whilst noting the impact of the pandemic on rail and parking demand, the report concluded that there may be a business case for the new car park as a standalone investment, but that the industry-wide case was weaker, as the new car park would abstract from the existing GTR facility.

More recent high level information from APCOA suggested ongoing occupancy at the GTR car park ranging from 49%-61%, broadly consistent with the data previously provided by GTR in 2022. However, this aggregated occupancy figure did not provide a sufficiently granular view of car park occupancy to be definitive.

APCOA previously provided an estimate of annual revenue from the new car park of £45k (net of VAT) compared to the May 2022 RTC estimate of c. £70k on a standalone basis (i.e. including abstracted revenue from the existing GTR car park). Additionally, the costs of construction of the new car park are higher than previously envisaged, due to inflation and general construction cost increases. Therefore, Network Rail wishes to further appraise the case for the new car park in more detail.

This report uses data from the automatic number plate recognition (ANPR) system in use at the station to determine the current usage of the GTR car park and update the estimate usage of the new facility. It also takes into account data provided by Network Rail relating to rail demand and future growth.

A site visit was also undertaken in early October to confirm actual occupancy and provide a base against which to apply the ANPR data.

- This report is structured as follows:
- Rail demand at Pulborough – latest data
- Current journey patterns
- Future growth forecasts
- Actual car park occupancy
- Future car parking demand appraisal and revenue model
- Conclusions

More detailed analysis of characteristics of the station, including historic destinations, access mode shares and post-Covid analysis is available in the original RTC reports. These are provided as an Appendix to this report for information and continuity of analysis.

3 Rail demand at Pulborough

3.1 Station usage data

The May 2022 report contained the latest station usage data from the Office of Rail and Road, published retrospectively each year. At the time the latest being 2020/21. The subsequent year 2021/22 was released towards the end of 2022 and is shown below.

For consideration of access to stations, particularly car parking, entries are of more interest than exits or interchanges. The 2021/22 data shows a recovery of demand following the significant impact of the pandemic in 2020/21.

The last pre-Covid full year (2018/19) showed annual entries of 189,368, equating to approximately 600 entries per day (railway planners typically assume that Saturday and Sunday combined are equivalent to a single weekday, therefore the annual entry figure is divided by 312). However, this is subject to fluctuations both during the week and also seasonally, therefore this represents the middle of a range rather than an absolute daily usage figure.

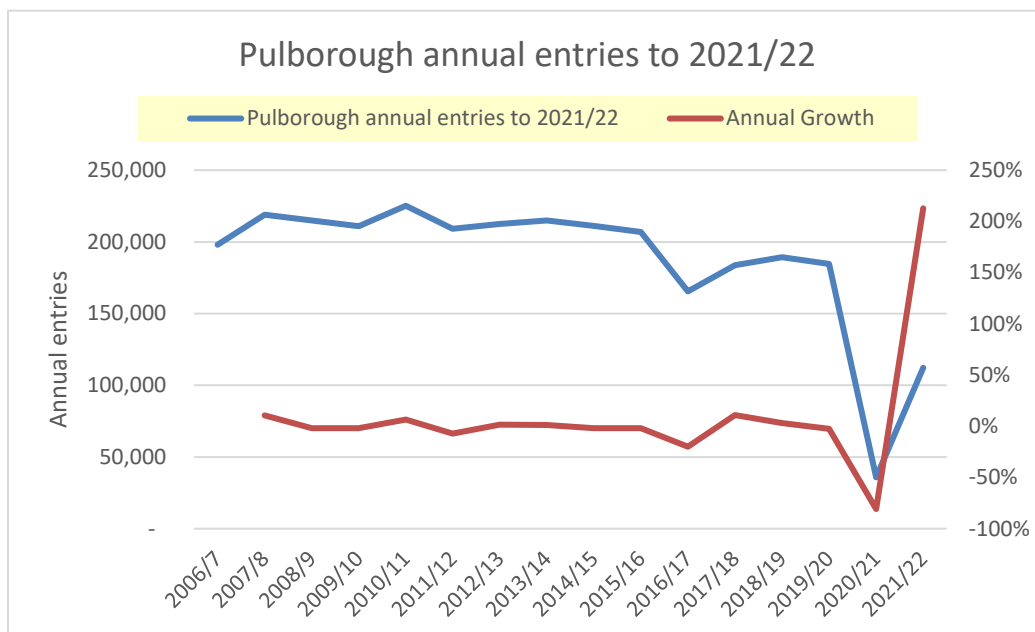


Figure 1. Pulborough station entries and growth to 2021/22

The pandemic impact was significant across the industry with rail services losing around 80% of demand. This is shown in the chart above for Pulborough with the subsequent recovery in 2021/22 representing 59% of 2018/19 demand.

Between the start of the pandemic impact and May 2023, the Department for Transport (DfT) had issued a weekly tracker of transport demand post-Covid, showing a recovery of overall rail demand of around 90%.

However it was widely reported by commuter train operators that demand had become concentrated mid-week, with proportionately lower demand on Monday and Friday than pre-Covid. This is likely to be due to the preference of those who can work from home to do so in greater proportions on Monday and Friday. This trend now appears to be embedded in work patterns. Additionally, leisure trips have led the recovery and are typically higher than pre-Covid.

Network Rail has provided journey flow data for Pulborough, which enables some analysis of the difference between pre-pandemic and current journey patterns and volumes, which provides some insight into the development of rail demand post-Covid. It has also provided the latest view of future demand forecasts. These are provided below.

3.2 Current journey patterns

Analysis below is derived from journey data that Network Rail has extracted from the MOIRA model used by the rail industry to appraise the impact of timetable and other changes on demand. It is derived from the LENNON ticketing system.

The table below shows the proportion of journeys to key destinations, from the historic 2005/6 National Rail Travel Survey (used as a base for station characteristics in the 2019 RTC report) contrasted with the LENNON data from Network Rail for the pre-Covid year and for 2022/23.

Pulborough NRTS (2005/6)		Pulborough pre-Covid (Periods 201913 to 202012)		Pulborough post-Covid (Periods 202210 to 202309)	
Victoria	36.9%	London BR	54.3%	London BR	42.4%
London Bridge	15.2%	Horsham	8.6%	Horsham	12.7%
East Croydon	10.7%	Gatwick Airport	3.3%	Gatwick Airport	4.1%
Horsham	6.5%	Croydon BR	2.7%	Billingshurst	3.9%
Chichester	5.2%	Chichester	2.6%	Chichester	3.9%
Waterloo	3.6%	Billingshurst	2.4%	Clapham Junction	2.3%
City Thameslink	3.2%	Crawley	2.3%	Crawley	2.3%
Barnham	2.3%	Clapham Junction	2.0%	Brighton	2.0%
Gatwick Airport	1.6%	Bognor Regis	1.8%	Bognor Regis	1.9%
		Arundel	1.4%	Barnham	1.9%
		Brighton	1.3%	Croydon BR	1.8%
		Barnham	0.9%	Arundel	1.7%

Table 1. Pulborough key destinations

It can be seen that the combined London demand in the NRTS of 58.9% is comparable with the pre-Covid 54.8% proportion of trips from Pulborough that were to London. Other journey patterns are broadly similar with slight increases in trips to Horsham and Gatwick and a decline in Croydon trips.

However, the later 2022/23 data shows significant reductions in the proportion of London trips and further increases in more local trips, particularly to Horsham, Billingshurst and Chichester. These local trips are less likely to be car dependent than London trips.

The further table below shows the quantum impact of these changes. London trips are 41% down in 2022/23 compared to the immediate pre-Covid year, those to Croydon down 50%. These reductions are reflective not only of the overall weaker commuter market recovery, but of the reduction in frequency of work related trips that has been widely evidenced post-pandemic.

Destination	Average pre-Covid (Periods 201913 to 202012)	Average post-Covid (Periods 202301 to 202313)	Variance	%
London BR	15,997	9,370	-6,627	-41%
Horsham	2,544	2,797	253	10%
Gatwick Airport	960	906	-54	-6%
Billingshurst	697	868	171	25%
Chichester	775	857	81	10%
Clapham Junction	585	508	-77	-13%
Crawley	685	497	-188	-27%
Brighton	385	432	46	12%
Bognor Regis	537	424	-113	-21%
Barnham	279	411	132	47%
Croydon BR	787	391	-395	-50%
Arundel	400	371	-29	-7%

Table 2. Post-Covid journey changes

Section 3.1 of this report noted that the last release of ORR data showed a 53% recovery in station entries compared to the base year of 2018/19. The summary table below shows the demand recovery in 2022/23 as 75%. This would indicate that station entries may have recovered to around 440 per weekday average from a 2018/19 high of around 600.

Pulborough journey flows	
Total Flows 2018/19	382,869
Total Flows 2022/23	287,063
Variance	-95,806
% variance	-25%
% recovery	75%

Table 3. Pulborough journey recovery

Whilst this level of recovery is higher than the ORR data and indicates continued growth in rail demand, it is weaker as a proportion of 2018/19 demand than a range of other stations recently studied. It may indicate that passengers using Pulborough have a greater propensity to work from home than the average, or that other some passengers may be travelling from alternative stations, such as Haslemere.

3.3 Future growth forecasts

In the 20 years following privatisation there was consistent growth across the network every year. This was driven by exogenous factors such as population and employment, supported by railway improvements including new trains, timetable and journey time improvements or station investment. However, even prior to the Covid impact on rail demand, there had been a plateauing of growth and in particularly some changes to commuting patterns, evidenced by a decline in season ticket purchases. Post-Covid, it is clear that forecasting future growth includes significant uncertainties, including:

- Whether commuting will continue in its current trends of midweek working, with a range of c.2.5-3.5 days per week in a workplace for those who are able to work from home?
- Whether employers will successfully encourage a return towards the average c.4.5 days per week in offices that was the case before the pandemic?
- Will leisure trips continue at higher levels than pre-Covid or even increase further?
- Macro-economic factors including employment trends.
- Housing development and population growth.

During the pandemic and the subsequent recovery period, DfT, working with the wider rail industry, developed a bespoke Covid recovery tool which looked at low, medium and high scenarios. This has been discontinued from May 2023 and the industry is working on developing new modelling tools. In the meantime the forecasts from the last version of the Covid recovery tool (v19.4) are the most appropriate for long term forecasts. The table below shows the range of potential growth and therefore the uncertainty in future demand. All percentages relate to total rail demand against the pre-Covid level of 2018/19.

Period	No covid	Low Covid	Medium Covid	High Covid	Medium Minus
2030	27%	-9%	7%	23%	-7%
2040	55%	11%	30%	50%	14%
2050	70%	21%	42%	64%	24%

Table 4. Future demand scenarios

Whilst DfT guidance has been to use the medium scenario for planning purposes, some rail operators have reported tracking the 'medium minus' scenario. Network Rail has also provided a separate MOIRA (a rail industry demand modelling tool) based bespoke forecast for Pulborough, unadjusted for Covid behavioural impacts. The long term factors from the Covid v19.4 tool have been applied to these as per Network Rail advice.

Demand Index	Pulborough	Adjusted by v19.4 long term factors
2019	1.00	1.00
2022	1.00	0.84
2030	1.23	1.03
2040	1.46	1.22
2050	1.57	1.32

Table 5. NR Moira based forecasts

The NR MOIRA forecasts are higher than the DfT Medium Minus scenario but lower than the Medium scenario and are broadly somewhere in between. When the DfT Medium and Medium Minus scenarios are applied to Pulborough, the following forecast ranges of annual entries to 2050 would result:

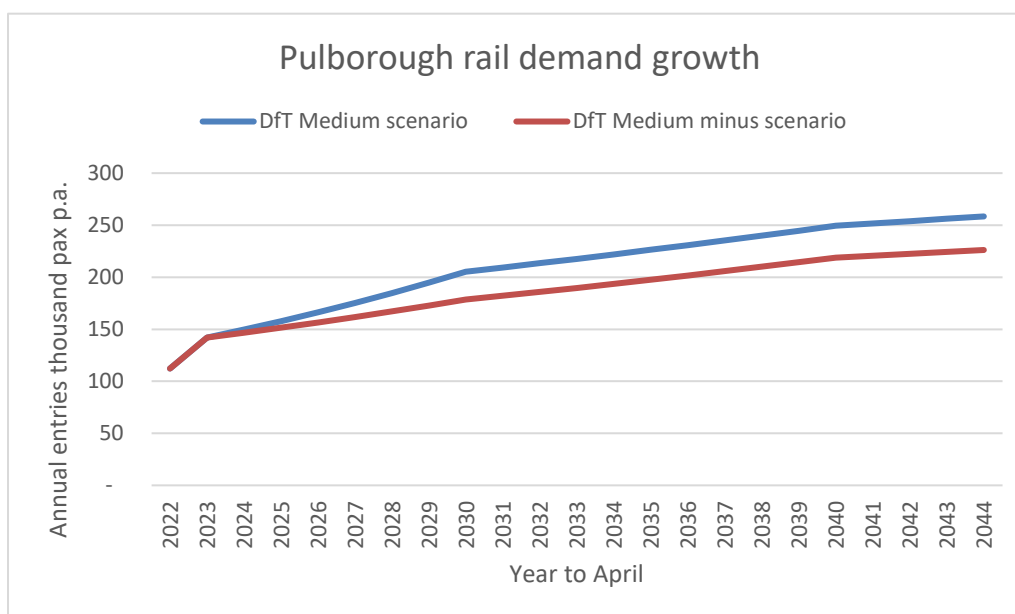


Figure 2. Demand forecast ranges

This data, presented numerically in the table below, shows overall demand recovering to 2018/19 pre-Covid levels somewhere towards the end of the 2020s in the Medium scenario and around 2033 in the Medium Minus scenario.

Pulborough entries (kpax) - actuals and Network Rail forecast												
2019-2030	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
DfT Medium scenario	189	185	36	112	142	150	158	166	175	185	195	205
DfT Medium minus scenario	189	185	36	112	142	147	152	157	162	167	173	179
2031-2040	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040		
DfT Medium scenario	209	214	218	222	226	231	235	240	245	250		
DfT Medium minus scenario	182	186	190	194	198	202	206	210	214	219		
2041-50	2041	2042	2043	2044	2045	2046	2047	2048	2049	2050		
DfT Medium scenario	252	254	256	259	261	263	265	268	270	273		
DfT Medium minus scenario	221	223	224	226	228	230	232	234	236	238		

Table 6. Demand forecast ranges

In terms of daily entries, this would translate into the following table. However it is prudent to note that two post-Covid factors make the previous division of annual entries by 312 less robust:

1. The concentration of weekday demand for commuting into midweek; and
2. The greater recovery of leisure travel, likely increasing weekend usage.

Therefore, the daily usage estimates below are reflective of a wider range of demand fluctuation of which this is an average.

Pulborough average estimated weekday entries												
2019-2030	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
DfT Medium scenario	607	592	115	360	455	480	506	533	562	592	625	658
DfT Medium minus scenario	607	592	115	360	455	470	486	502	519	536	554	572
2031-2040	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040		
DfT Medium scenario	671	684	698	712	726	740	754	769	784	800		
DfT Medium minus scenario	584	596	608	621	634	647	660	673	687	701		
2041-50	2041	2042	2043	2044	2045	2046	2047	2048	2049	2050		
DfT Medium scenario	807	814	821	829	836	843	851	858	866	874		
DfT Medium minus scenario	707	713	719	725	732	738	744	750	757	763		

Table 7. Daily usage future estimates

4 Actual car park occupancy

4.1 Occupancy data

Historically, car park occupancy has been recorded through occasional manual observations. These snapshots are limited in their usefulness in understanding build-up of demand throughout the day and fluctuations between days of the week. The widespread implementation of ANPR systems at station car parks, as well as protecting revenue, offer the opportunity to gather more detailed data and gain a more comprehensive understanding of usage. However, there are caveats to the use of this data:

1. ANPR is not 100% effective in capturing all vehicles entering and exiting car parks
2. Errors in reads, if not regularly monitored and base occupancy recalibrated, result in occupancy counts in the ANPR back office system diverging from the actual occupancy.
3. There is no 'base' number in ANPR data typically provided, therefore it is not possible to ascertain actual occupancy.

One way of providing an alternative occupancy calculation is to deploy automatic traffic count (ATC) systems on the roadway. However, as shown in the site image below, Pulborough is not suitable for this approach due to the lack of defined entrance roadways directly to the car parks. Therefore, in order to overcome the issues with ANPR data, it was agreed with GTR and APCOA that data would be provided from 5 October 2023 and a site visit undertaken on that day with a definitive count of vehicles in both car parks to provide a base against which to add and subtract entries and exits.

4.2 Pulborough car parks

The two car parks are designated by GTR as Right and Left. Photos from the site visit of the two car parks are shown below.



Figure 3. Right car park



Figure 4. Left car park

Each car park (the Right car park is shown as **1** in the image below, the Left car park as **2**) has a separate ANPR system capturing vehicle entries and exits. Unlike many station car parks, where short stay parking, particularly that associated with drop off (kiss & ride) and pick up of passengers is within the capture zone of the ANPR system, the car parks at Pulborough are separate from the main forecourt where kiss & ride is likely to take place (**3**). This is also important at Pulborough as there is a roadway proceeding from the station approach, leading to adjacent commercial premises. It is important that the ANPR system does not capture vehicles using this road (**4**).



Figure 5. Pulborough layout

During the site visit the occupancy the two car parks was counted as follows:

Car park	Capacity	Occupied	%
Right	107	41	38%
Left	52	43	83%
Total	159	84	53%

Table 8. 5 October 2023 occupancy

There were also 2 cars in the short stay / forecourt area and 30 cars on the A368 roadside.

The above context is provided to enable a considered appraisal of the ANPR data provided in the following section.

4.3 ANPR data

The data provided by APCOA for the periods 5 October to 2 November 2023 for the Right and Left car parks at Pulborough is categorised into Entry / Exit and Unknown. The 'unknown' records are generated when the camera and its associated software is unable to determine whether a vehicle entering or exiting the car park. This might be due to very low speeds, for example if traffic is queueing in or out of the car parks. The tables below show the proportion of each record.

Right CP		
Entry	2993	45%
Exit	3103	47%
Unknown	542	8%
Total	6638	100%

Table 9. Right car park records

Left CP		
Entry	1027	46.2%
Exit	1066	48.0%
Unknown	128	5.8%
Total	2221	100.0%

Table 10. Left car park records

These records show 8% unknown records in the Right car park and 5.8% in the Left car park. It can also be noted that the percentage of entries is lower than those of exits for both. It is therefore reasonable to conclude that more of the unknown data records are entries than exits. The chart below shows the distribution of unknown data records, with a spike in the Right car park around 10.00.

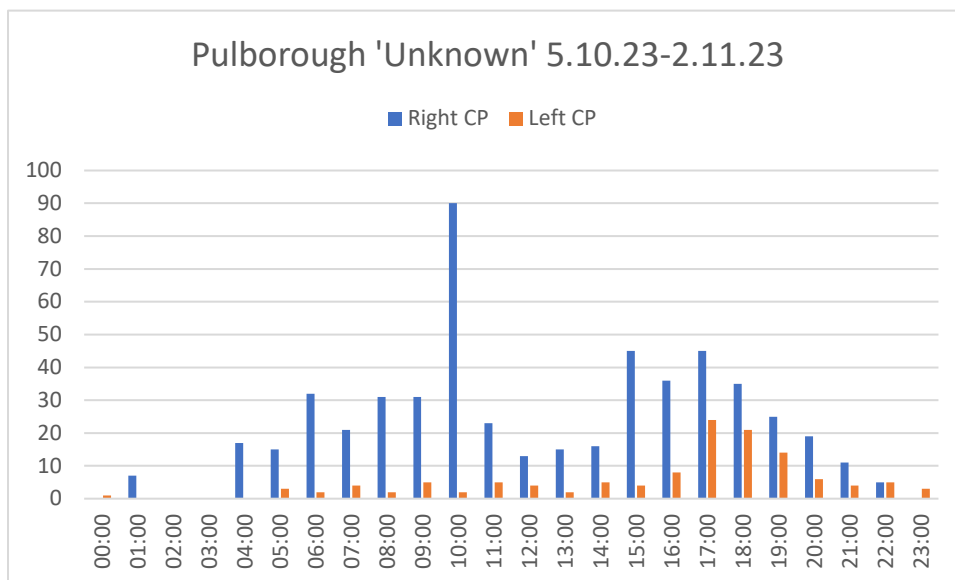


Figure 6. Unknown data records time distribution

In order to derive accurate occupancy, the first task was to apply the occupancy record of 5 October 2023 (taken at 16.00) and derive a starting occupancy for each car park for that day by adding and subtracting entry and exit records from the start of the day. This gave a starting occupancy for each car park of 15 vehicles for the Right car park and 20 for the Left car park. For the subsequent days to 2 November 2023 occupancy was calculated by adding 1 for entries, -1 for exits and (initially) a value of 0 for unknown. This 0 value would be correct if the unknown entries were equally split between entry and exit. As noted above that is not the case.

Therefore, a further exercise was undertaken to apply example values (using a goal seek function in excel) to the unknown records for each car park to calibrate the proportion of the unknown entries that should be entry or exit. This value was set at 0.2, therefore overall unknown data records are 20% more likely to be entries than exits. There is an

inevitable error margin here, but it is considered relatively insignificant. Even a minor deviation from the 0.2 value results in the cumulative occupancy diverging below zero or above the capacity of the car parks, therefore there is a high likelihood that this value is sufficiently accurate to generate credible occupancy values across the period. APCOA and GTR have been advised of this calculation methodology.

4.4 Average and maximum occupancy

The chart and table below show the combined occupancy of both car parks by day of week and across the whole period against the total car park capacity of 159 spaces. There was no impact on demand from any industrial action and no evidence of significant disruption to rail services due to unplanned incidents or planned engineering work.

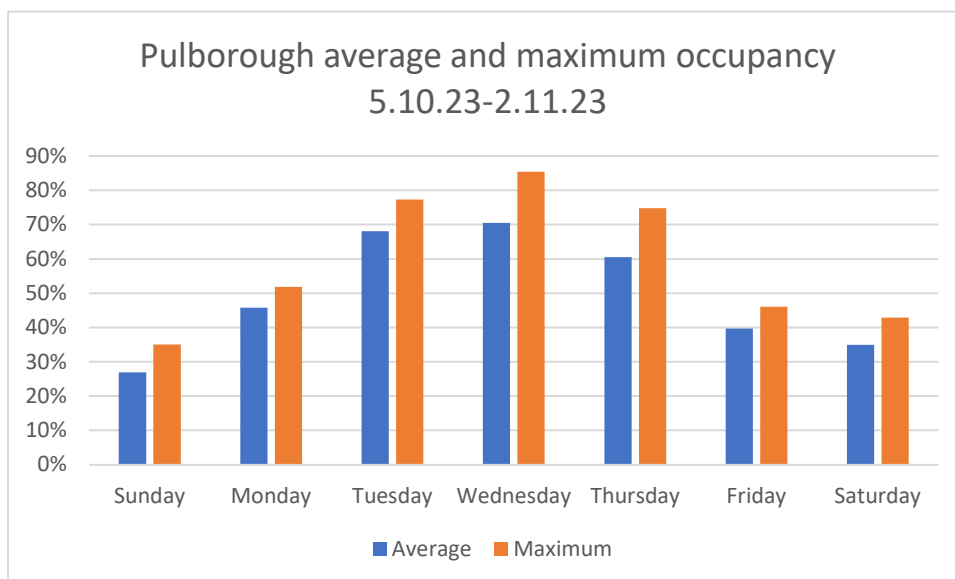


Figure 7. Average and maximum occupancy by day

Day	Average	Maximum
Sunday	27%	35%
Monday	46%	52%
Tuesday	68%	77%
Wednesday	71%	85%
Thursday	60%	75%
Friday	40%	46%
Saturday	35%	43%

Table 11. Average and maximum occupancy by day

The pattern in the chart and table above shows a typical midweek peak of a station that is primarily used for commuting. There is not a large difference between the average and the maximum for each day, suggesting a reasonably high degree of consistency over the 4 week period. The further chart below shows the records for each day. This shows a high in combined occupancy on Wednesday 18 October of 136 vehicles.

Day	Date	Right CP	Left CP	Total	%	Available capacity
Thursday	05/10/2023	46	45	91	57%	68
Friday	06/10/2023	40	27	67	42%	92
Saturday	07/10/2023	26	37	63	40%	96
Sunday	08/10/2023	21	23	44	28%	115
Monday	09/10/2023	34	37	71	45%	88
Tuesday	10/10/2023	58	52	110	69%	49
Wednesday	11/10/2023	67	47	114	72%	45
Thursday	12/10/2023	67	52	119	75%	40
Friday	13/10/2023	41	28	68	43%	91
Saturday	14/10/2023	39	25	65	41%	94
Sunday	15/10/2023	41	2	43	27%	116
Monday	16/10/2023	56	21	76	48%	83
Tuesday	17/10/2023	91	32	123	77%	36
Wednesday	18/10/2023	84	52	136	85%	23
Thursday	19/10/2023	68	51	119	75%	40
Friday	20/10/2023	46	28	73	46%	86
Saturday	21/10/2023	44	24	68	43%	91
Sunday	22/10/2023	39	17	56	35%	103
Monday	23/10/2023	50	32	82	52%	77
Tuesday	24/10/2023	68	37	105	66%	54
Wednesday	25/10/2023	71	28	100	63%	59
Thursday	26/10/2023	62	32	94	59%	65
Friday	27/10/2023	23	22	44	28%	115
Saturday	28/10/2023	26	1	26	17%	133
Sunday	29/10/2023	28	1	29	18%	130
Monday	30/10/2023	40	21	61	38%	98
Tuesday	31/10/2023	61	34	95	60%	64
Wednesday	01/11/2023	65	34	99	62%	60
Thursday	02/11/2023	39	19	58	37%	101

Table 12. Occupancy by day

The right hand column shows the available capacity against the maximum occupancy. This is to determine room for growth and also the implications for future control of the A368 roadway where vehicles currently park. This has been previously observed as between 30 and 50. However, it is clear that the primary motivation for parking on the roadway and negotiating a substandard pedestrian route is to avoid the parking tariff, not because there is no available capacity in the station car park. Therefore, it is likely that not all vehicles currently using the roadway would transfer to the station car park. Some may revert to kiss & ride or other access modes. The average midweek capacity availability is shown below.

Day	Available capacity
Tuesday	51
Wednesday	47
Thursday	63

Table 13. Available capacity midweek average

This shows there is generally more than adequate capacity in the car parks to accommodate current demand with a significant headroom for growth.

4.4.1 Entry and exit build up

The ANPR data has been analysed by time of entry and exit. As the two charts below show the typical commuter patterns of entry concentrated into the morning peak and exits in the afternoon peak can be seen.

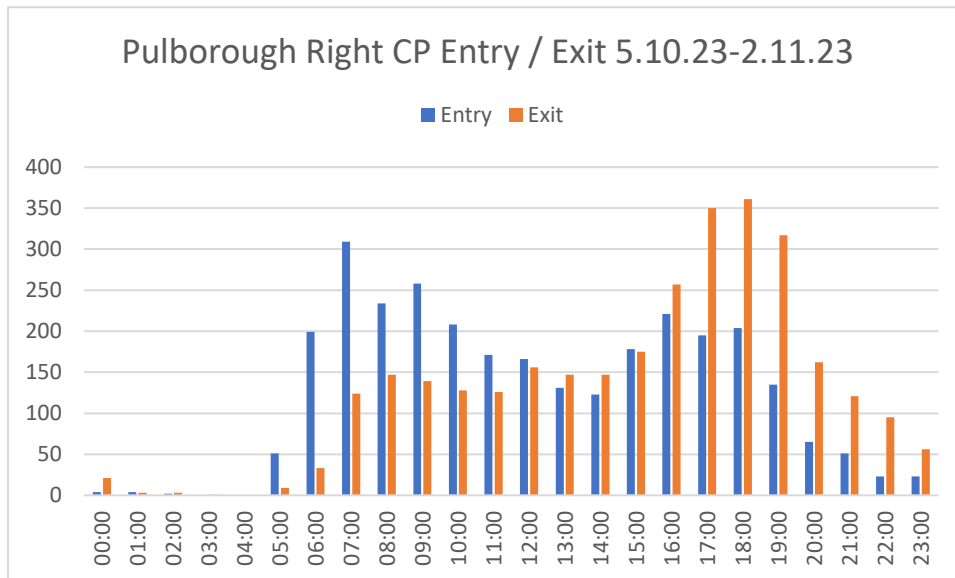


Figure 8. Right car park entry and exit time distribution

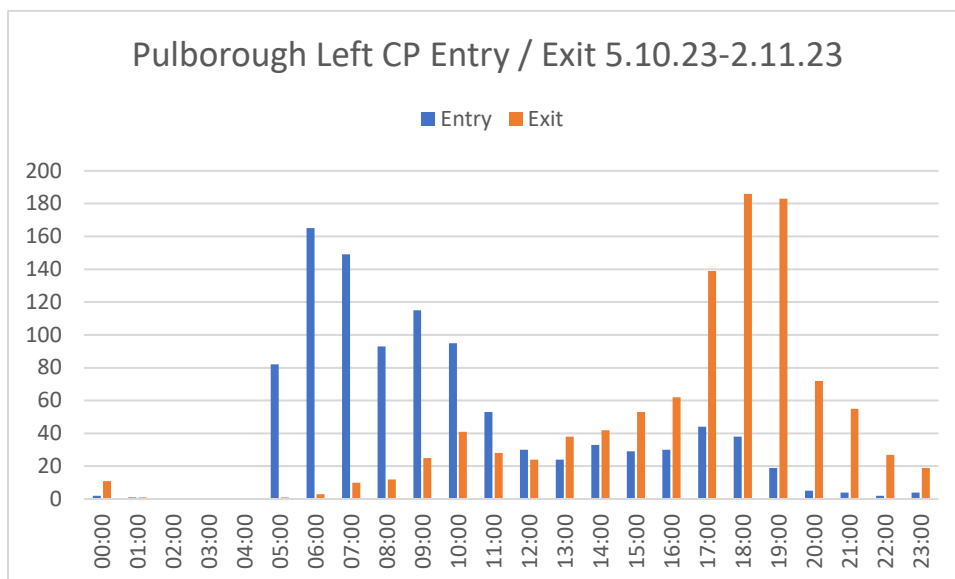


Figure 9. Left car park entry and exit time distribution

5 Future car parking demand appraisal

5.1 Previous estimates of parking demand

5.1.1 2019 Occupancy estimate

In the 2019 report, the demand for parking was previously estimated at around 250, using the daily entries of around 592 and the reported proportion of these passengers accessing by car and parking at 48%, with an allowance of 1.1 passengers per vehicle. This led to the assumption that the new car park would reach high levels of occupancy from opening, particularly since the option of parking on the A238 would no longer be available and a proportion of those vehicles would transfer to the new car park.

5.1.2 2022 Occupancy estimate

The May 2022 report concluded that the pandemic impact had changed the nature of rail and parking demand and behaviour to the extent that this calculation was no longer robust. Observations of the existing station car park and data received from GTR showed that in May 2022 it was no longer at the previously high levels of occupancy. It was suggested at the time that there may have been a reduction in the proportion of passengers accessing by car and parking at the station. This was believed to be partially attributable to an increase in kiss & ride, since this trend had been observed on a recent large scale study for a commuter train operator. The logic for the shift was hypothesised as likely to be because more people have a vehicle available to drop a partner / spouse / family member at the station since they are working from home and not driving to employment locations. A second contributing factor might be greater price sensitivity, seeking to avoid the car park tariff, during a period of cost of living pressure.

The 2022 report also incorporated some higher level ANPR data and the observations from a site visit to provide a suggested range of demand at the time, as shown in the table below.

Day	ANPR data		Adjusted equivalent	
Mon	62	39%	51%	81
Tue	84	53%	69%	110
Wed	74	47%	61%	97
Thu	66	41%	54%	86
Fri	48	30%	39%	63
Sat	41	26%	34%	53
Sun	75	47%	62%	98

Table 14. 2022 occupancy table

The adjustment was made on the basis of the observed occupancy being higher than that suggested by the ANPR data. It should be noted that this data, both the ANPR data (which was based on occasional snapshot readings not a continuous accumulation of entry and exit records) and the site visit occupancy, do not present as accurate a record of occupancy as the detailed ANPR data shown in the 2023 analysis in this report.

5.1.3 2023 Occupancy data

There is no evidence that the factors cited above regarding access mode splits and weakening car park demand have changed. However, the provision of the ANPR data enables a more robust view to be taken on current and future car park demand. This is particularly since this report covers October, which has been used for rail industry counts for some decades as the high point of commuting in the year.

As noted in section 3.2 of this report, journey data for 2022/23 from Network Rail shows that Pulborough has recovered to 75% of its pre-Covid usage. This equates to an average of 440 estimated weekday passenger entries. Given the average car park weekday occupancy of 90, the access mode share for car parked at or near the station is 21%. This is reduced from the NRTS surveys, discussed in the 2019 report, where 48% of passengers responding to the survey arrived at the station by car and parked. This reduction is supported by wider evidence across the industry of a shift from car parking, predominantly to kiss & ride. It also provides for the possibility that if the growth in the Medium or Medium Minus scenarios is realised, there may be further mode shift away from car parked at or near the station, e.g. to walking, cycling, public transport or as previously kiss & ride.

The average and maximum car parked demand derived from the ANPR system as described in section 5 of this report has had the Medium and Medium Minus growth scenarios applied below to show a potential range of future demand. These are shown in the table below. These categories are described as:

Maximum – the occasional periods where demand is at its highest. For Pulborough, the ANPR data over 4 weeks has only 5 occasions where occupancy was higher than 70% and 1 occasion where occupancy was greater than 80%. It represents the potential for some suppression of demand for parking (and therefore reduced car park revenue), but a lower level of suppression of demand for rail services as historical evidence suggests passengers will switch mode or station rather than not take a rail trip.

Average all week demand – this represents the generation of revenue and therefore supports the business case for investment

Average weekday demand – this covers the majority of parking events (82.5% of car park entries were on a weekday). It is a good indicator that when this measure exceeds capacity there is a more significant loss of parking revenue and a greater potential for some suppression of rail demand.

In the charts below, cells are coloured red when demand exceeds current capacity of 159 spaces.

Medium scenario										
Year to April	2024	2025	2026	2027	2028	2029	2030			
Maximum	136	143	151	159	168	177	186			
Weekday average	90	95	101	106	112	118	124			
All week average	79	83	88	93	98	103	108			
Year to April	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040
Maximum	190	194	198	201	205	209	214	218	222	226
Weekday average	127	129	132	134	137	140	142	145	148	151
All week average	111	113	115	117	119	122	124	127	129	132
Year to April	2041	2042	2043	2044	2045	2046	2047	2048	2049	2050
Maximum	228	230	233	235	237	239	241	243	245	247
Weekday average	152	154	155	156	158	159	160	162	163	165
All week average	133	134	135	136	138	139	140	141	143	144

Table 15. Medium growth scenario car park demand

Medium minus scenario										
Year to April	2024	2025	2026	2027	2028	2029	2030			
Maximum	136	140	145	150	155	160	165			
Weekday average	90	94	97	100	103	107	110			
All week average	79	82	84	87	90	93	96			
Year to April	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040
Maximum	169	172	176	179	183	187	191	194	199	203
Weekday average	112	115	117	119	122	124	127	130	132	135
All week average	98	100	102	104	106	109	111	113	115	118
Year to April	2041	2042	2043	2044	2045	2046	2047	2048	2049	2050
Maximum	204	206	208	210	211	213	215	217	219	220
Weekday average	136	137	138	140	141	142	143	144	146	147
All week average	119	120	121	122	123	124	125	126	127	128

Figure 10. Medium minus growth scenario car park demand

It can be seen that the maximum demand would start to exceed capacity on occasion by 2027 in the Medium scenario and by 2029 in the Medium Minus scenario. However, for the weekday and all week averages existing capacity is not exceeded until 2046 in the Medium scenario and never (to 2050) in the Medium Minus scenario.

The **maximum** number of vehicles that would be diverted to the new car park (with an assumption of 50% of current roadway parking migrating to the new car park) is as follows:

New car park maximum occupancy	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047	2048	2049	2050
Medium scenario	7	15	24	33	42	46	50	54	57	61	65	70	74	78	82	84	86	89	91	93	95	97	99	101	103
Medium minus scenario	1	6	11	16	21	25	28	32	35	39	43	47	50	55	59	60	62	64	66	67	69	71	73	75	76

Table 16. Maximum occupancy of new car park

These vehicles would of course only be parking on the occasions that capacity was exceeded – not every day as the weekday and all week average figures above show, therefore these numbers do not translate directly into car park revenue.

5.2 Revenue forecast

Previously, assumptions were made around the proportion of vehicles that would switch from the GTR car park and also divert from the roadway to the new car park. These assumptions remain valid as the new car park would be attractive to most or all passengers originating from the west of the station. This approach was to enable a standalone business case to be established for the new car park.

However, given the current whole industry perspective, a new revenue model has been developed that includes current revenue from the GTR car park and uses the scenarios provided in this report for future growth, therefore providing the **incremental** income from the new car park only. It assumes:

- The current mode share for car parked at or near the station is maintained, although as noted in this report, there is a possibility that this mode share will continue to decrease.
- No season ticket sales are assumed here, since the changes in working patterns has resulted in a decrease in all season ticket sales.
- Additionally, this model is based on the average car park occupancies derived from the October ANPR data, a typically peak time. For these reasons, this is the likely best case revenue scenario.

The values here are 2023 with no inflation applied. However, any inflation application would apply equally to the combined revenue so no benefit would be gained from doing so. As the chart below shows, significant levels of incremental revenue only start to flow from the mid-2030s.

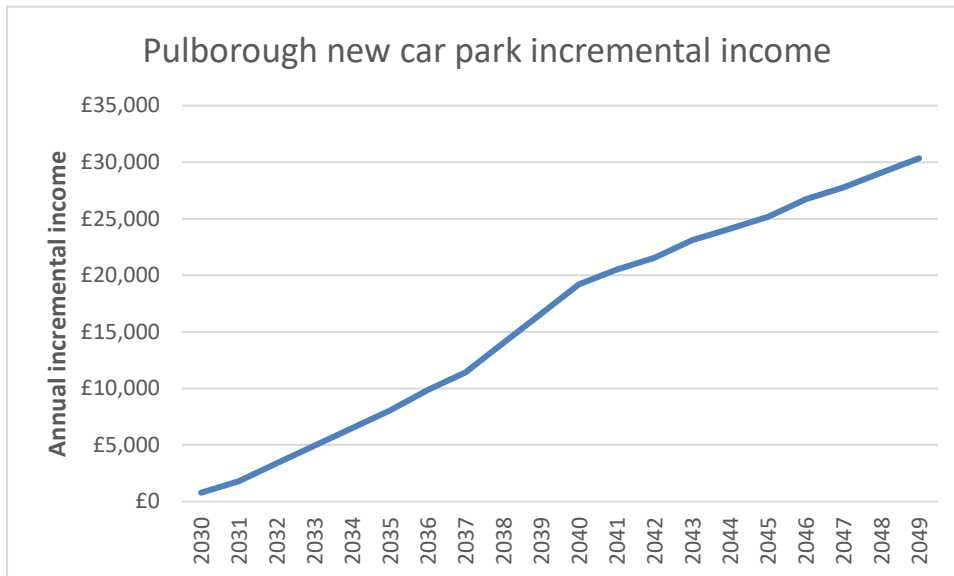


Figure 11. Pulborough new car park incremental revenue

Whilst a full business case analysis is not presented here (since the revised capital cost of the new car park is not available), it is reasonable to assume that the considerable cost of constructing the new car park would not be justified either in the generation of parking revenue or in the potential loss of rail revenue due to future demand suppression.

6 Conclusions

- Rail demand at Pulborough has recovered to around 75% of pre-Covid levels
- The access mode for car parked at or near the station has declined
- Whilst there are uncertainties around future rail demand the current scenarios show very low occupancy of a new car park in the early years, concentrated into midweek days. Incremental revenue generated by the overall increase in car park capacity does not start to be generated until 2030.
- This does not at this stage indicate the demand for a new car park is sufficient to justify its capital cost.
- It is recommended that the project to develop the second car park is not progressed at this stage and further analysis of both rail and car parking demand is undertaken in due course (probably not until at least 2025).
- Land should be retained in Network Rail ownership and safeguarded to cover the eventuality that a new car park would be justified.
- An alternative approach might be to develop a new entrance and smaller car park / forecourt area and develop the remainder of the land for further residential units if this was within permissible planning parameters for the land.

7 Appendix A – May 2022 Pulborough car park report