

Chapter 4: Regional Analysis



4 Regional Analysis

4.1 Introduction

This chapter provides a regional analysis of the study results. By breaking England into the nine regions it aims to inform stakeholders at a more detailed level. A number of the outputs in this chapter also present data at the local authority level within each region. This further segmentation of the results enables the analysis to be more targeted in its approach and identify the specific locations of greatest demand for lorry parking in each region.

4.1.1 Structure of Regional Analysis

All of the nine regions have a consistent format. The analysis is structured to guide the reader through a logical narrative. The sequence of outputs therefore aim to build up the overall picture of lorry parking demand, from the base information through to more complex presentations of multiple layers of data. As an outline, the analysis of each region has the following structure:

- **Regional Overview:** Three tables are used to depict base information such as the facilities, utilisation and crime totals. These are important to provide the context for each region before it is discussed in detail.
- **Facilities and Capacity:** There are two maps that illustrate capacity by specific location and within each local authority. This helps the reader to understand the options that were available to drivers and the locations in relation to the SRN.
- **On-Site Parking:** This is used to start the process of understanding demand. It therefore maps the on-site utilisation of each local authority within the region (as a percentage of total capacity). This will start to highlight areas that do not have enough capacity to accommodate on-site parking demand.
- **Off-Site Parking:** The analysis is separated into three sections with corresponding maps, including:
 - i. A map that shows the total number of vehicles that were parking off-site in each local authority of the region. This shows the overall extent of off-site parking.
 - ii. A more detailed analysis showing the specific location and type of off-site parking. This includes a differentiation between lay-bys, industrial estates and types of vehicle. Due to the level of detail means the region must be broken down into a number of maps¹⁰. The maps also include the individual on-site parking locations and depict how full they were. This helps to identify patterns of off-site parking compared to on-site availability.
 - iii. A hotspots map is used to identify locations where there was high off-site parking (25 vehicles or more, within a 5km radius of each other). This is a focussed analysis used to uncover specific locations of high off-site parking within the large area of a region.
- **Excess Demand:** This analysis presents an overall situation of demand for each local authority in the region, in terms of the total vehicle numbers that needed to park (on and off-site combined) compared to total capacity. Excess demand is important to identify local authorities, where even if off-site parking could be moved to on-site locations, there would not be enough capacity. Excess demand is therefore an indicator for potential required development, and at a minimum it is an indicator that there is an issue within the region.
- **Crime:** This is used to add a further level of comparison to demand issues¹¹. The total number of crimes is highlighted in each local authority of the region. A further map is then used to show specific locations of where crime was happening in relation to the hotspots of off-site parking and utilisation of on-site parking. This helps to understand any relationship between location of crime and demand.

¹⁰ The number of maps depends on the size of the region

¹¹ All crime data sourced from Truckpol 2010

Capabilities on project:
Transportation

4.7 South East

List of Key Facts:

- The South east had 1,992 lorry parking spaces spread across 48 on site lorry parking locations throughout the region. This was comparatively high compared to other regions
- Parking provision was generally focused between London and Dover, along the south coast and in between the M40 and M3
- There was capacity spread across many local authorities in the south east, however there were notable gaps. The location of such gaps included an area between the M23 and M3, and an area near the M2 and A2, through Swale and Canterbury Districts
- The level of on site utilisation in the South East was 71%; this is high compared to the national average of 61%.
- Overall 27 of the 48 lorry park sites in the region were more than 75% utilised. This shows that there were many local authorities with high usage, and a shortage of supply
- There was severe off site parking, particularly between London and Dover, south of the M25, and west of London
- The highest level of off site parking was in Swale with more than 75 vehicles parking off site. There was also between 50 and 75 vehicles parking off site in each of Cherwell, Canterbury and Dover districts
- A severe off site parking hotspots was identified at the M2/A249 junction and along the A249
- Off site parking hotspots were also spread throughout the region on the M20, A2, M25, and at the M3/M27 junction just north of Southampton
- Basingstoke and Deane, Canterbury, Dover, and Milton Keynes all had excess demand
- There were 348 recorded freight crimes in 2010, costing the industry £8.7 million. This corresponds to high levels of off site parking and a lack of capacity

4.7.1 Overview

The base information contained in the following Tables 4.16, 4.17 and 4.18 will be analysed in detail throughout the South East regional analysis. This will include the use of maps, graphs and written commentary as described in section 4.1.1 Structure of Regional Analysis.

Table 4.16 Overview of facility types and capacity in the South East region

Name	Type	Overnight Cost (£s)	Capacity
Airport Cafe	Independent	£10 or less but more than £5	17
Albion St, Shoreham	Local Authority	£5 or less	30
Ashford International	Independent	£25 or less but more than £20	275
Beaconsfield Services	MSA	£20 or less but more than £15	60
Chalet Cafe	Independent	Free	40
Cherwell Valley	MSA	£25 or less but more than £20	180
Chieverley Services	MSA	£20 or less but more than £15	90

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Chris's Cafe	Independent	£20 or less but more than £15	35
Clacket Lane Services Eastbound	MSA	£30 or less but more than £25	67
Clacket Lane Services Westbound	MSA	£30 or less but more than £25	71
Crossbush Services	TRSA	£10 or less but more than £5	15
Dover Truckstop	Independent	£25 or less but more than £20	100
Emsworth Services	TRSA	Free	15
Farlington Truckstop	Independent	£20 or less but more than £15	60
Fleet Services Northbound	MSA	£25 or less but more than £20	45
Fleet Services Southbound	MSA	£25 or less but more than £20	55
Liphook Services Northbound	TRSA	Free	8
Liphook Services Southbound	TRSA	Free	7
London Rd, Bognor Regis	Local Authority	£10 or less but more than £5	12
Maidstone Services	MSA	£30 or less but more than £25	28
Medway Services North	MSA	£20 or less but more than £15	42
Medway Services South	MSA	£20 or less but more than £15	24
Membury Services Eastbound	MSA	£20 or less but more than £15	40
Membury Services Westbound	MSA	£20 or less but more than £15	70
Merrychest Cafe	Independent	Free	9
Mumby Rd Gosport	Local Authority	Free	14
Nells Cafe	Independent		30
Newport Pagnell Northbound	MSA	£20 or less but more than £15	50
Newport Pagnell Southbound	MSA	£20 or less but more than £15	35
Oakdene Cafe	Independent	£5 or less	10
Ower Roundabout	TRSA	Free	7
Oxford Services	MSA	£25 or less but more than £20	60
Pease Pottage Services	MSA	£20 or less but more than £15	30
Polegate Services	TRSA	Free	6
Portchester Lorry Park	Local Authority	Free	12
Reading Services Eastbound	MSA	£20 or less but more than £15	55
Reading Services Westbound	MSA	£20 or less but more than £15	39
Rownhams Services Eastbound	MSA	£20 or less but more than £15	70
Rownhams Services Westbound	MSA	£20 or less but more than £15	50
Square Deal Cafe	Independent	Free	2
Stop24 Services -Folkestone	MSA	£20 or less but more than £15	20
Sutton Scotney Northbound	TRSA	Free	15
Sutton Scotney Southbound	TRSA	Free	15
The Cabin Cafe	Independent	£15 or less but more than £10	12
The Shack Cafe	Independent	Free	5
Tot Hill	TRSA	Free	27

Capabilities on project:
Transportation

Winchester Services {N}	MSA	£20 or less but more than £15	18
Winchester Services {S}	MSA	£20 or less but more than £15	15
Total			1,992

Table 4.17: Overview of on-site utilisation, off-site parking and excess demand in the South East region

Utilisation						
Vehicle Type	UK Artic	non-UK Artic	UK Rigid	non-UK Rigid	Total	% Utilisation
On-site parking	620	493	188	10	1,415	71%
Off-site Parking	Lay-bys	593	273	67	6	939
	Industrial Estates	133	35	58	2	228
Excess Demand		590				

Table 4.18: Overview of 2010 reported freight crime in the South East region

Reported Freight Crime ²²					
Number of recorded crimes in 2010	348				
Severity Index ²³	1	2	3	4	5
Number of crimes recorded	70	226	51	0	1
Value of freight crimes recorded	£2,984,023*				
Estimated total value of freight crimes recorded	£8,700,000**				

*Note that only reported costs are included in this data. Not all crimes were given an associated cost due to information not being available.

**In 2008 Truckpol estimated an average incident to cost £25,000. This base figure is used to estimate the total cost of freight crime in the region. This accounts for where cost information was not available.

4.7.2 Facilities and Capacity

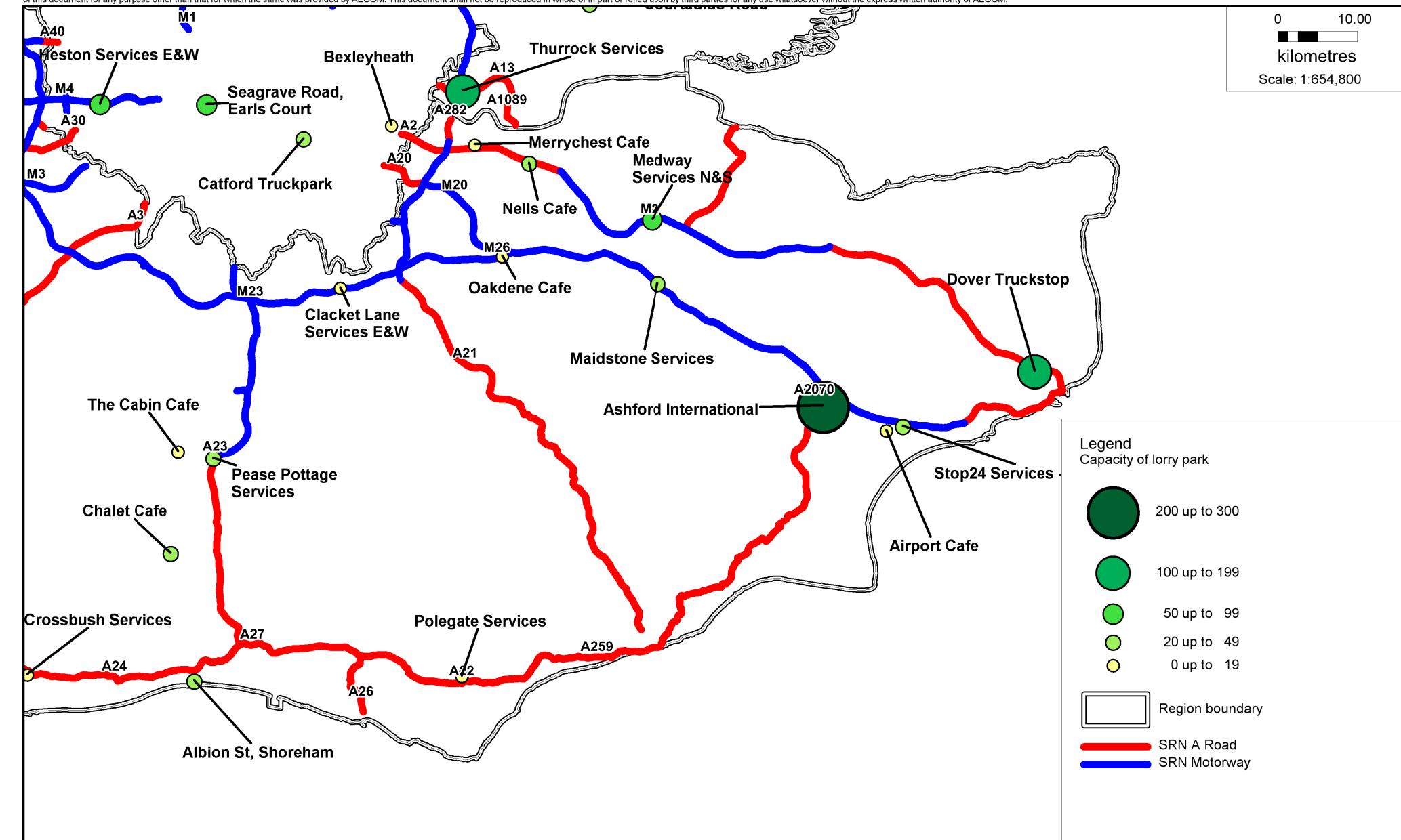
The South east had 1,992 lorry parking spaces spread across 48 on-site lorry parking locations throughout the region. 33 of the sites had fewer than 50 spaces and three had more than 100 spaces. This indicated a mix of small, medium and large lorry parking facilities across the region. Map 4.7.1 shows that the parking provision was generally focused between London and Dover, along the south coast and in the wedge created by the M40 and M3.

As shown in map 4.7.2 the local authorities of Ashford and West Berkshire provided the largest number of spaces, with between 250 and 500 spaces in each. There was capacity spread across many local authorities in the south east, however there were notable gaps. The location of such gaps included an area between the M23 and M3, and an area near the M2 and A2, through Swale and Canterbury Districts.

²² Truckpol 2010

²³ See Appendix 5 for explanation of crime severity index

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kilometres
Scale: 1:654,800



Client: Department for Transport

Project: Lorry Parking Study

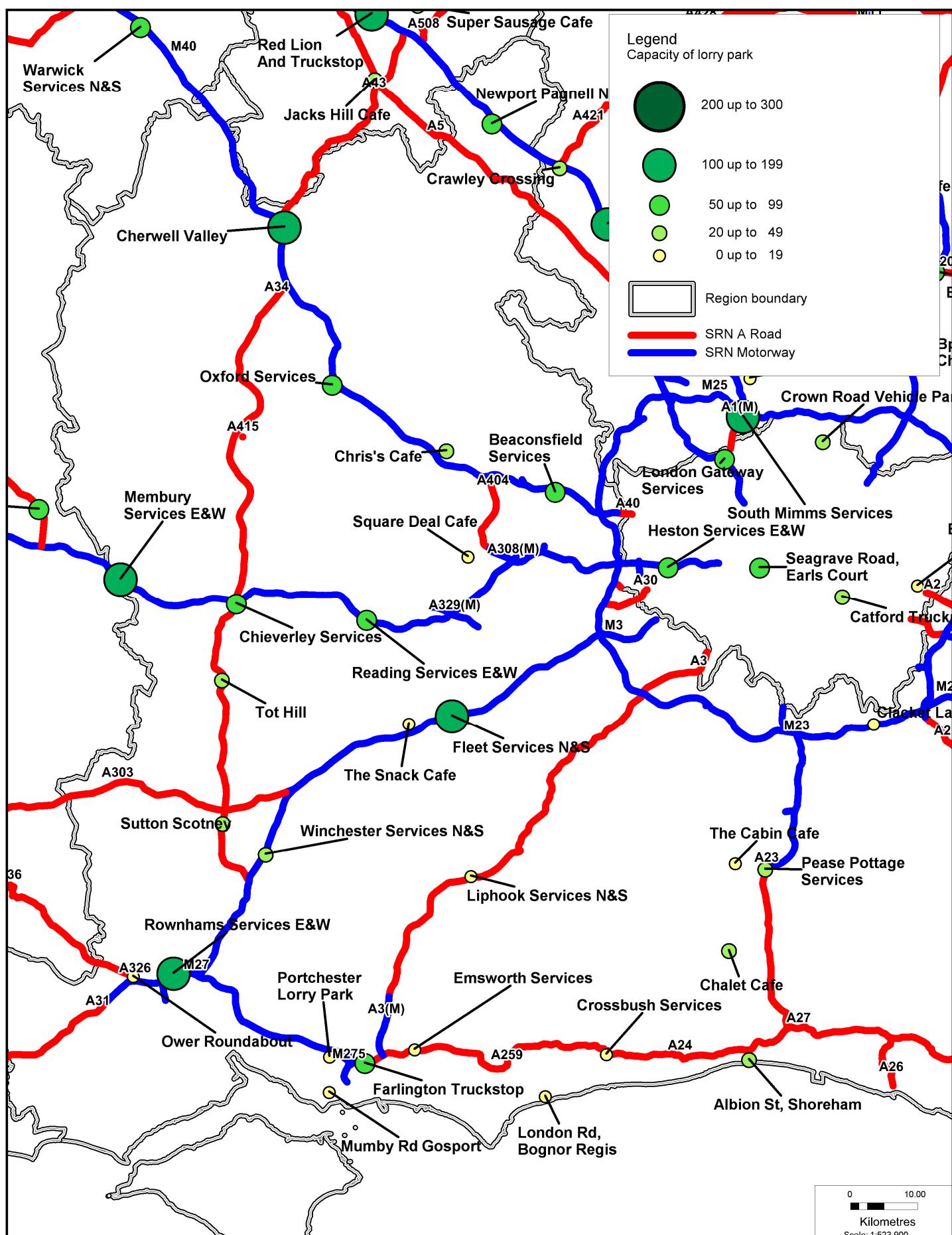
Title: South East:
Capacity of lorry parking sites
Part 1

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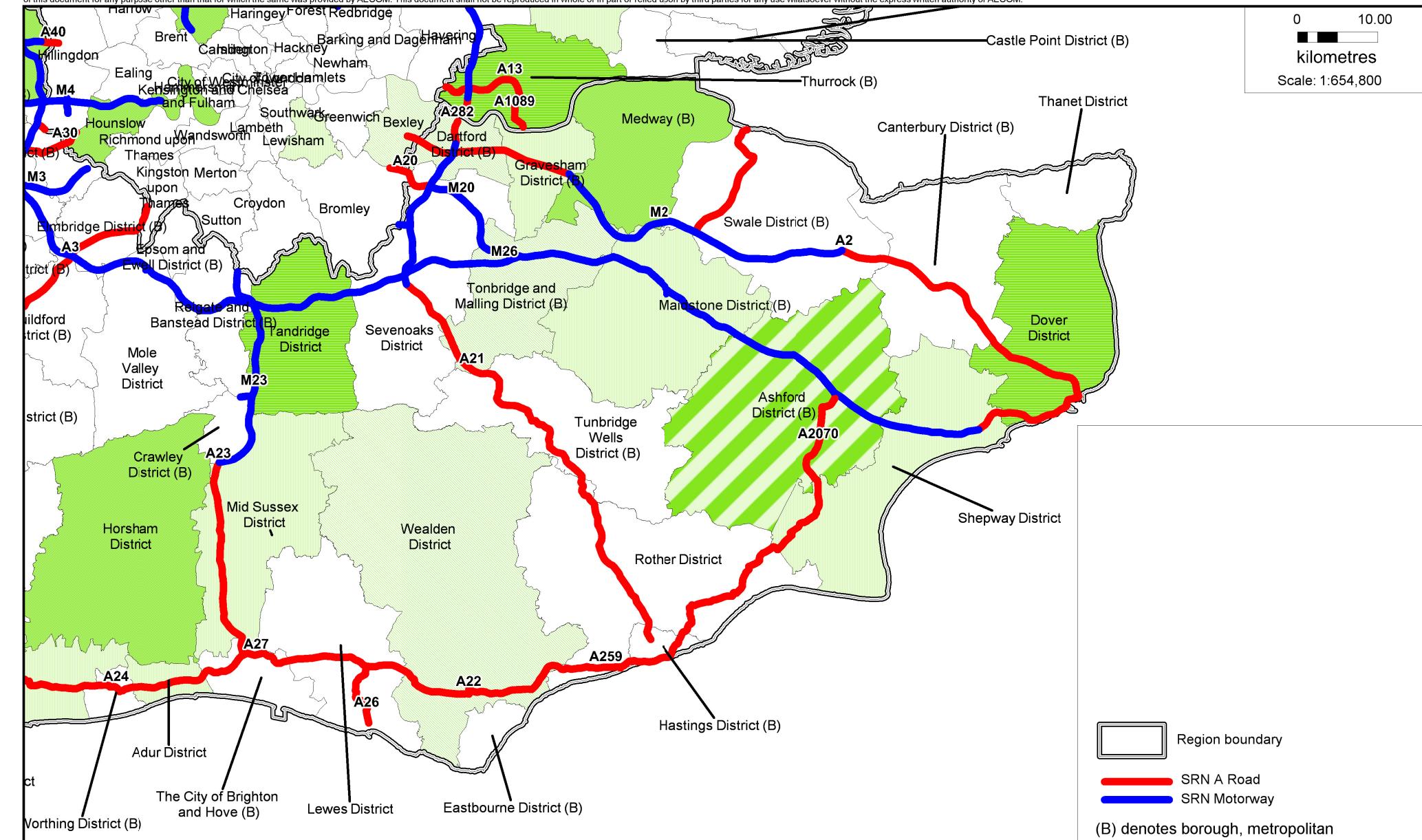
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Date: 21.06.11	Scale: 1: 1,654,800
No: Map 4.7.1	



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Scale: 1:654,800



Client: Department for Transport

Title:

South East:
Onsite lorry parking capacity
Part 1

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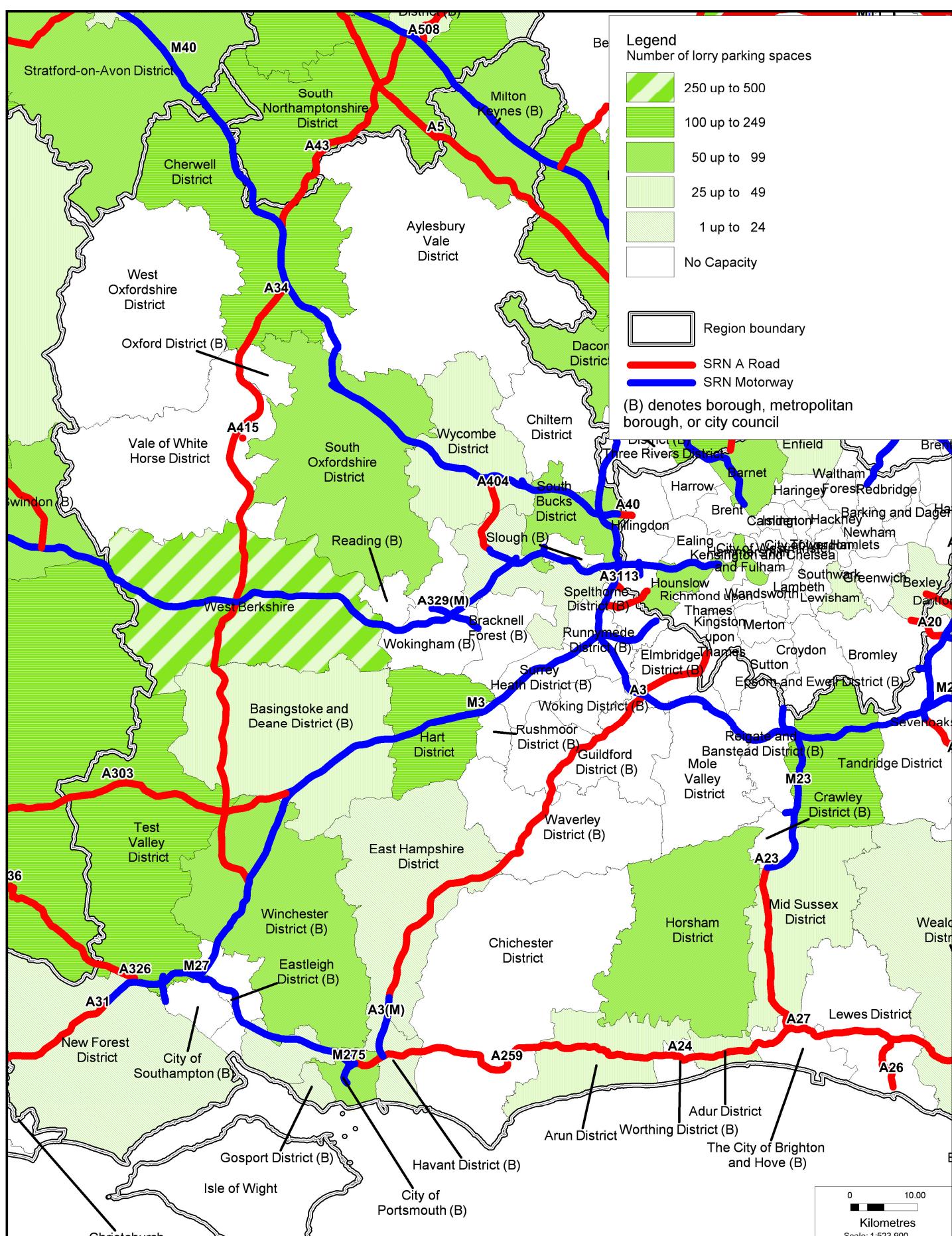
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Client: Department for Transport	Title: South East: Onsite lorry parking capacity Part 2	AECOM Lynfield House Church Street Altrincham, WA14 4DZ	Design: T.F Chk'd: J.M Date: 21.06.11 No: Map 4.7.2	Mapinfo: T.F App'd: S.H Scale: 1:523,900
Project: Lorry Parking Study			Tel: +44 (0) 161 927 8200 www.AECOM.com	

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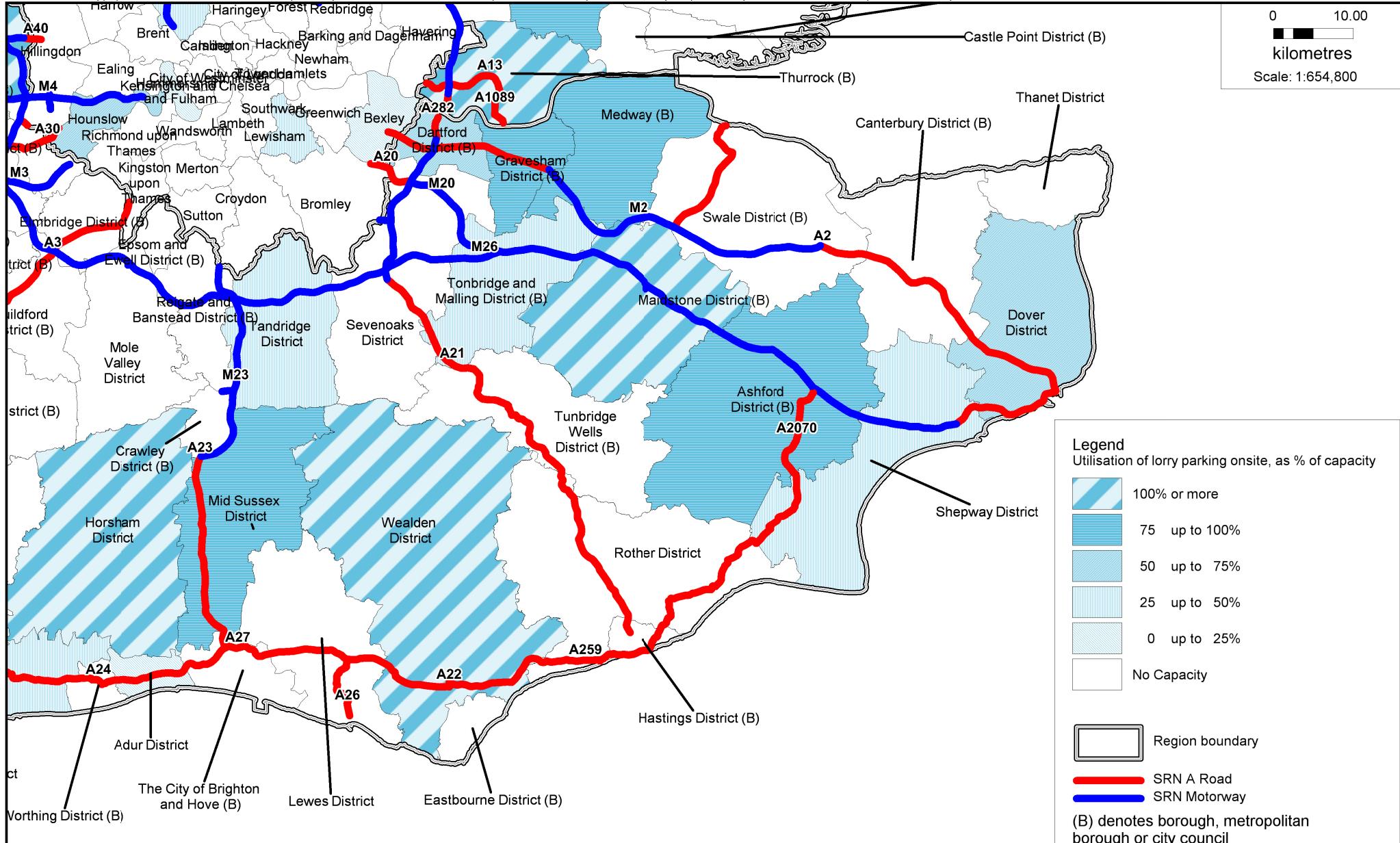
4.7.3 On-site Parking

The level of on-site utilisation in the South East was 71%; this was comparatively busy against the national average of 61%. Utilisation at this level was an indicator that certain lorry parking sites will be at or over capacity in the region. As this was also an average time of year it indicated at peak times the entire region could be close to, or exceed full capacity.

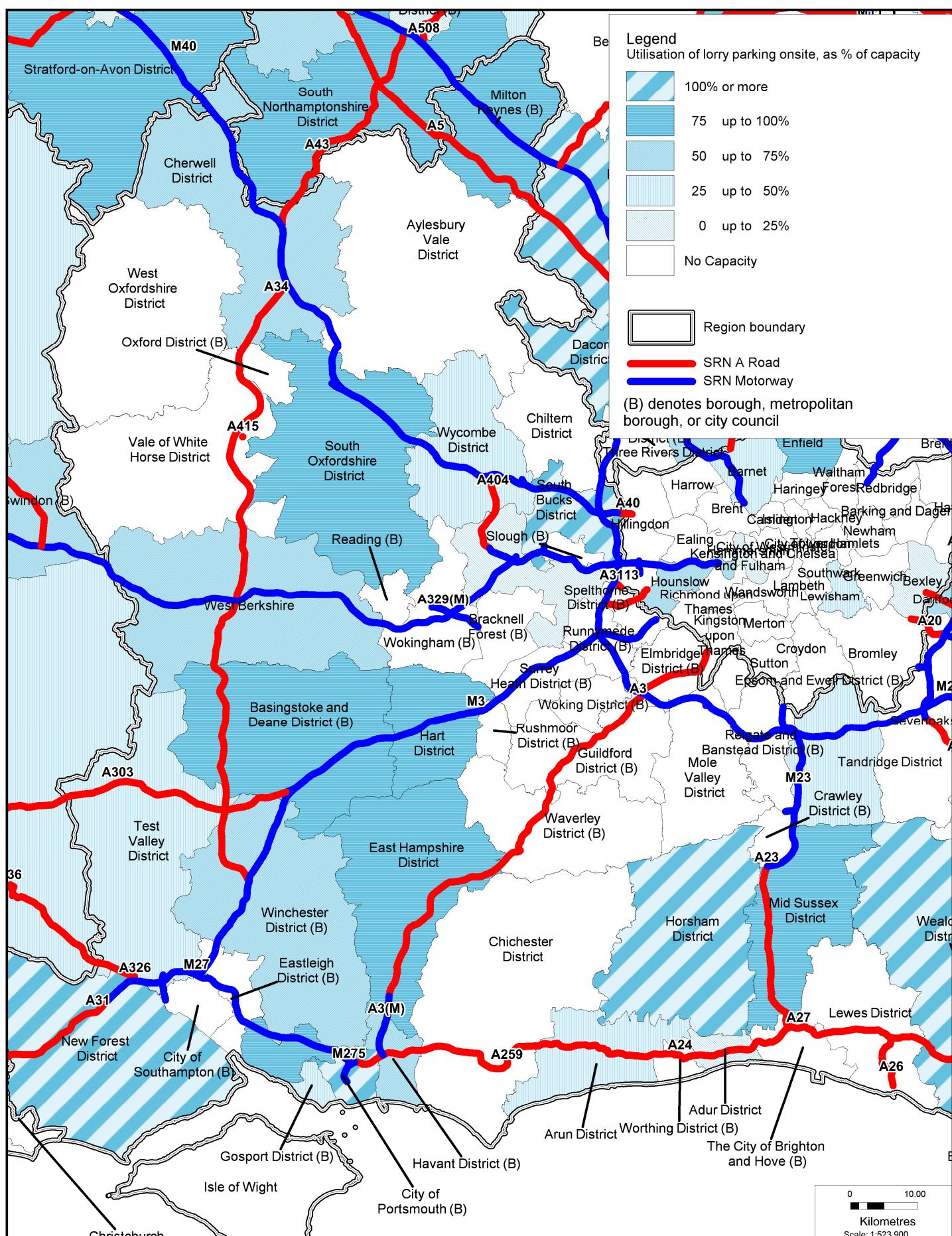
Approximately half of vehicles counted on-site were UK registered articulated vehicles and just fewer than 40% were non-UK registered articulated vehicles. These types of vehicle are generally used for long distance journeys and thus would be more likely to be parking overnight than in a local yard, furthermore many of these vehicles will be travelling to and from continental Europe.

At the local authority level (see map 4.8.3) the busiest local authorities are Maidstone, South Bucks, Wealden, Horsham, City of Portsmouth and New Forest districts, all of these were between 75 - 100% utilised, or in some cases in excess of 100% utilised.. Ashford, Medway, Gravesham, Mid Sussex, East Hampshire, Hart, Basingstoke and Deane, South Oxfordshire, Milton Keynes and Fareham were between 75 and 100% utilised. A further six local authorities were between 50 and 75% utilised. This shows that the South East had many local authorities which were extremely busy and facilities were close to capacity in much of the region.

The hotspot and on-site utilisation map (4.8.9) shows that 27 of the 48 lorry park sites in the region were more than 75% utilised. This shows that there were many local authorities with high usage, and a shortage of supply. Only in some pockets of the region was there a surplus of provision. This indicates that in some isolated cases where there was off-site parking there may be scope to encourage drivers to use lorry parking sites nearby, which had spaces to accommodate them.



Client:	Department for Transport	Title: South East: Onsite lorry parking utilisation Part 1		Design:	T.F	Mapinfo:	T.F
Project:	Lorry Parking Study			Chk'd:	J.M	App'd:	S.H
		Lynnfield House Church Street Altrincham, WA14 4DZ		Date:	21.06.11	Scale:	1:1,654,800
				Tel:	+44 (0) 161 927 8200	No:	Map 4.7.3
					www.AECOM.com		



Client: Department for Transport

Project: Lorry Parking Study

Title: South East:
Onsite lorry parking utilisation
Part 2

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Mapinfo: T.F

App'd: S.H

Scale: 1:523,900

Map 4.7.3

Capabilities on project:
Transportation

4.7.4 Off-site Parking

The off-site parking maps (see maps 4.7.4, 4.7.5, 4.7.6, 4.7.7, 4.7.8 and 4.7.9 - all immediately after this page) shows that the number of vehicles parking in lay-bys and industrial estates was greatest towards the northeast and southeast of the region. Table 4.17 (see section 4.7.1) shows that over 45% of all vehicles parking in the South East were parking off-site, despite lorry parking sites being 71% full. The high number of off-site parking as well as high utilisation indicates a combination of drivers choosing not to use sites in order to save money, that the facilities and security may not have been sufficient enough to attract them or possibly that they were being turned away due to sites being fully utilised. In certain areas there was a definite lack of supply of parking spaces.

Map 4.7.4 shows the highest level of off-site parking was in Swale with more than 75 vehicles parking off-site. There was also between 50 and 75 vehicles parking off-site in each of Cherwell, Canterbury and Dover districts.

Map 4.7.4 also shows that Shepway, Ashford, Tonbridge and Malling, Tandridge, Mid Sussex, Mole Valley, Guildford, New Forest, City of Southampton, Test Valley, Basingstoke and Deane, West Berkshire and Milton Keynes all had between 25 and 50 vehicles. Off-site parking was wide spread throughout the region.

Given the size of some local authorities within the region it is important to understand exactly where the hotspots of off-site parking were. The South East hotspot map 4.7.9 shows seven locations where there were more than 25 vehicles parked off-site within in a 5km radius of each other. These are around:

- Southampton;
- A404 between Maidenhead and High Wycombe, where the A34 meets the M40 north of Oxford;
- Milton Keynes,
- M25 from the M3 to M23, Maidstone to Sheerness;
- M2 from Ashford to Folkestone, and
- Dover and Faversham on the A2.

The detailed off-site parking map (see maps 4.7.5, 4.7.6, 4.7.7 and 4.7.8) shows the exact locations of the lay-bys and industrial estates being used for parking during the survey, this analysis can also be related back to the hotspot analysis. The hotspot around Ashford, Dover and Faversham was caused by vehicles parking mainly in lay-bys on roads close to the M2 and A2. Many of these vehicles would have been travelling to/from the port of Dover.

The hotspot surveyed between Maidstone and Sheerness was likely to be related to the port activities in Sheerness. Vehicles parking here could have either be waiting to load/unload goods at the ports, or waiting for the optimal time to begin their journey to London or beyond.

The hotspot on the M25 was caused by vehicles parking in lay-bys; on the A22 and A25 near Caterham, just off junction 9 and on the A3 off junction 10.

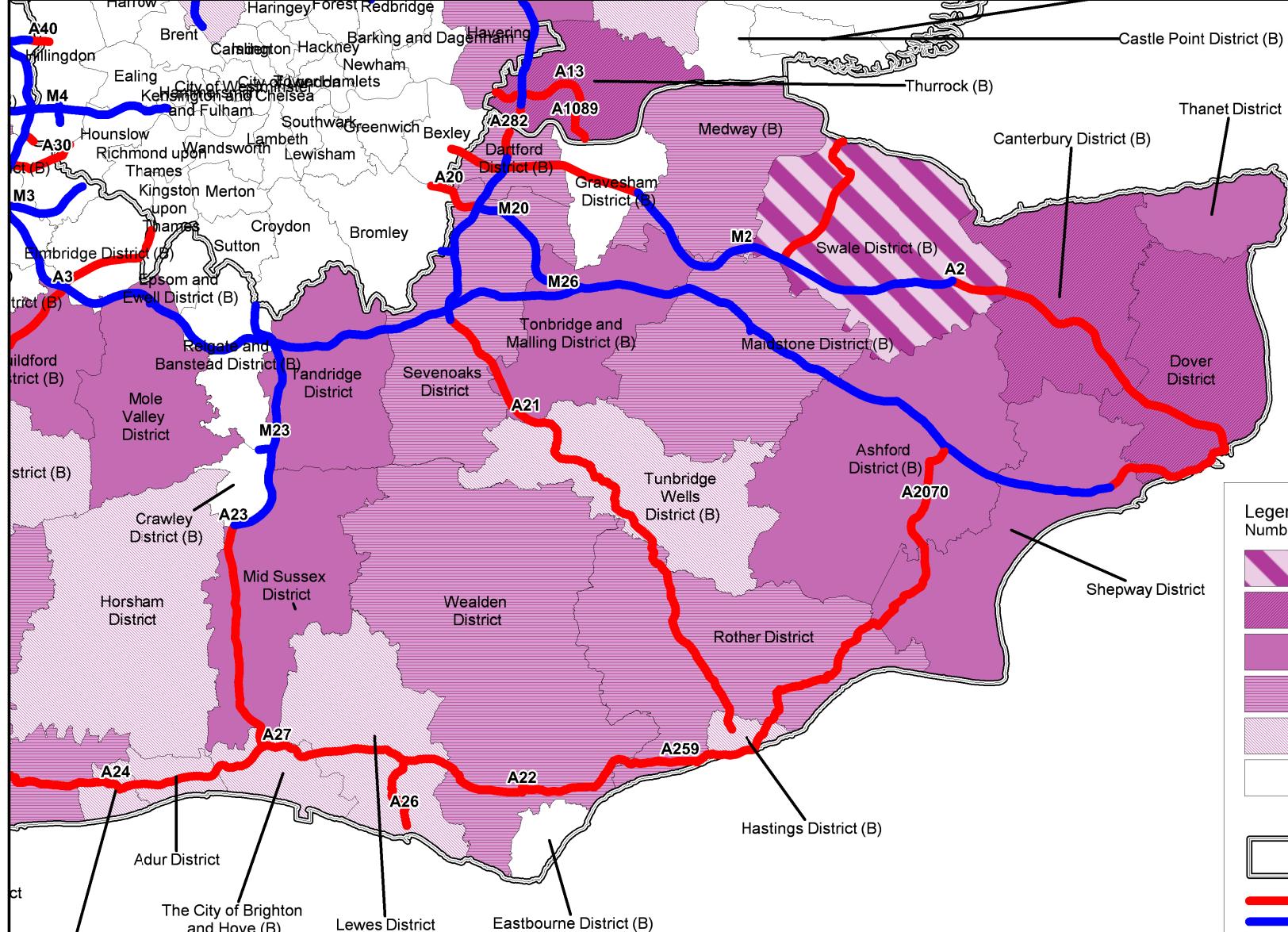
The hotspot around Southampton was caused mainly by vehicles parking in industrial estates around the city. These could have been related to industries nearby or the port facility at Southampton.

The hotspot at the A34 / M40 interchange was caused by vehicles parking in lay-bys on the A34. Given their location, it is possible that these vehicles were stopping overnight as part of longer journeys.

The Milton Keynes hotspot was caused by vehicles parking in two industrial estates near the M1; Kingston and Northfield. These could either have been linked to traffic related to deliveries in Milton Keynes or stopping overnight as part of a longer journey.

The vehicles parked in the hotspot on the A404 could have been using this route as a cut-through between the M4 and the M40 avoiding the M25.

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kilometres
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Legend
Number of vehicles parked off-site

75 or more
50 up to 74
25 up to 49
10 up to 24
1 up to 9
None

Region boundary

SRN A Road
SRN Motorway

(B) denotes borough, metropolitan
borough or city council

Client: Department for Transport

Title: South East:
Number of vehicles parked off-site
(lay-bys and industrial estates)
Part 1

Project: Lorry Parking Study

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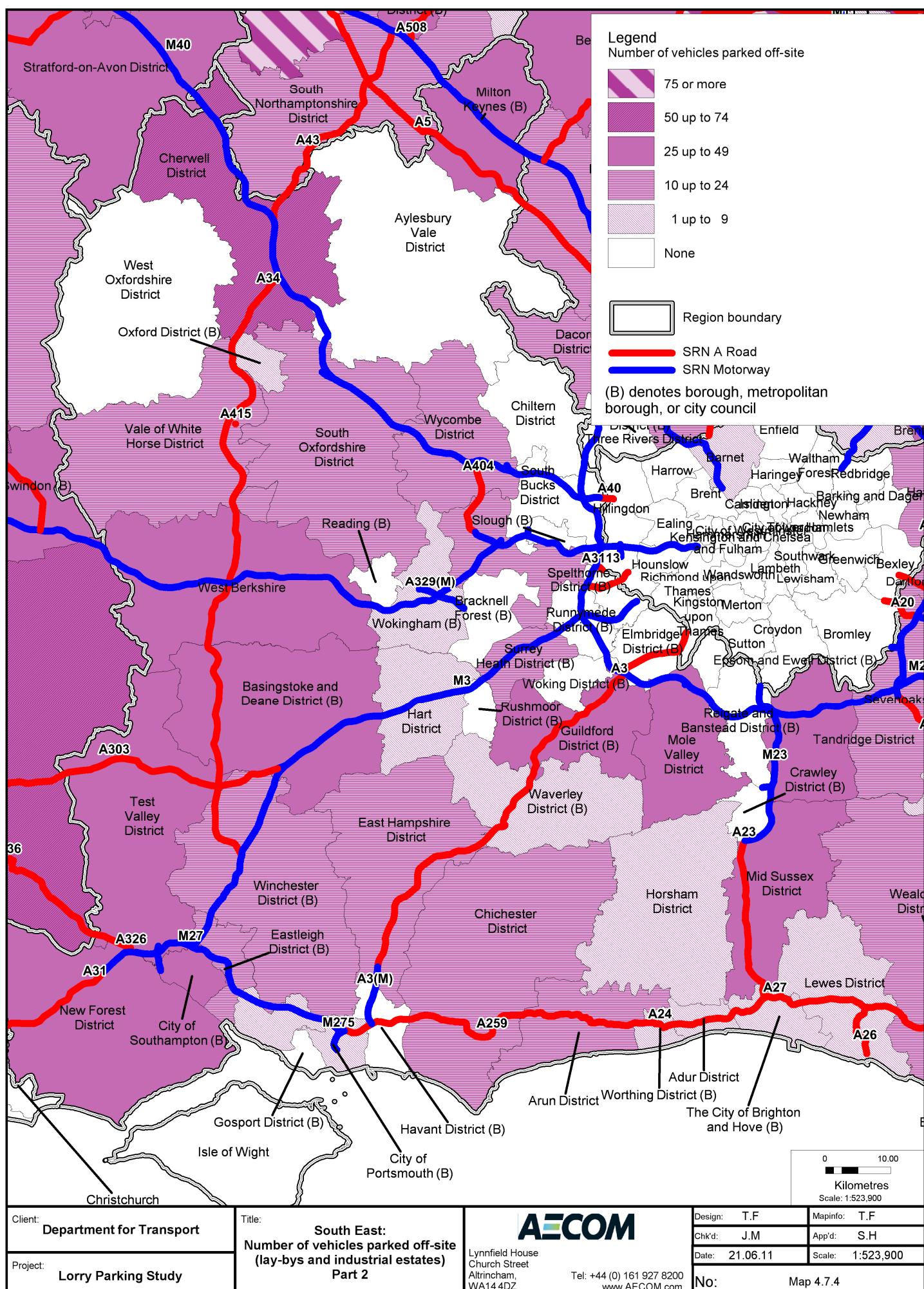
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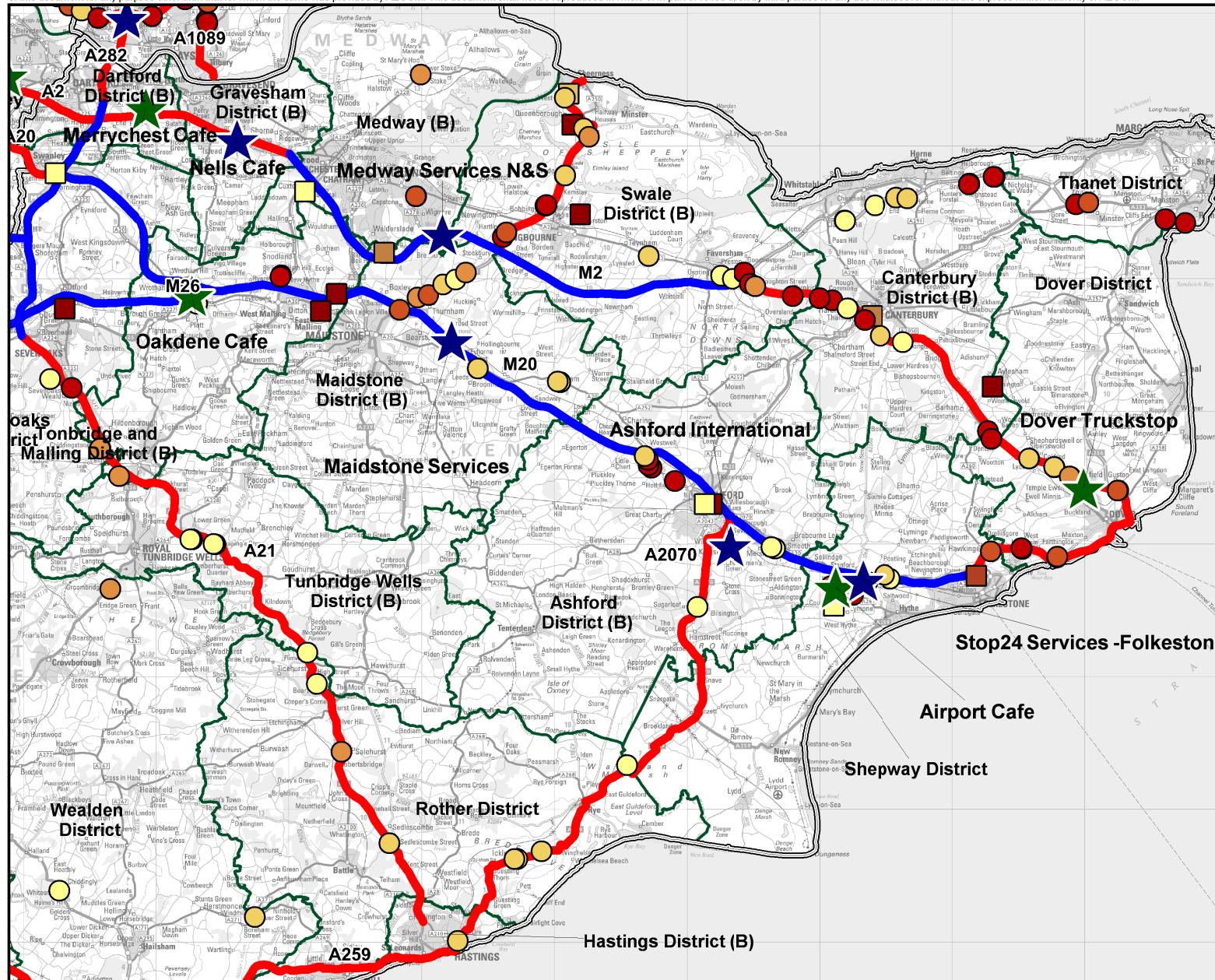
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Date: 21.06.11 Scale: 1: 1,654,800

No: Map 4.7.4





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Client: Department for Transport

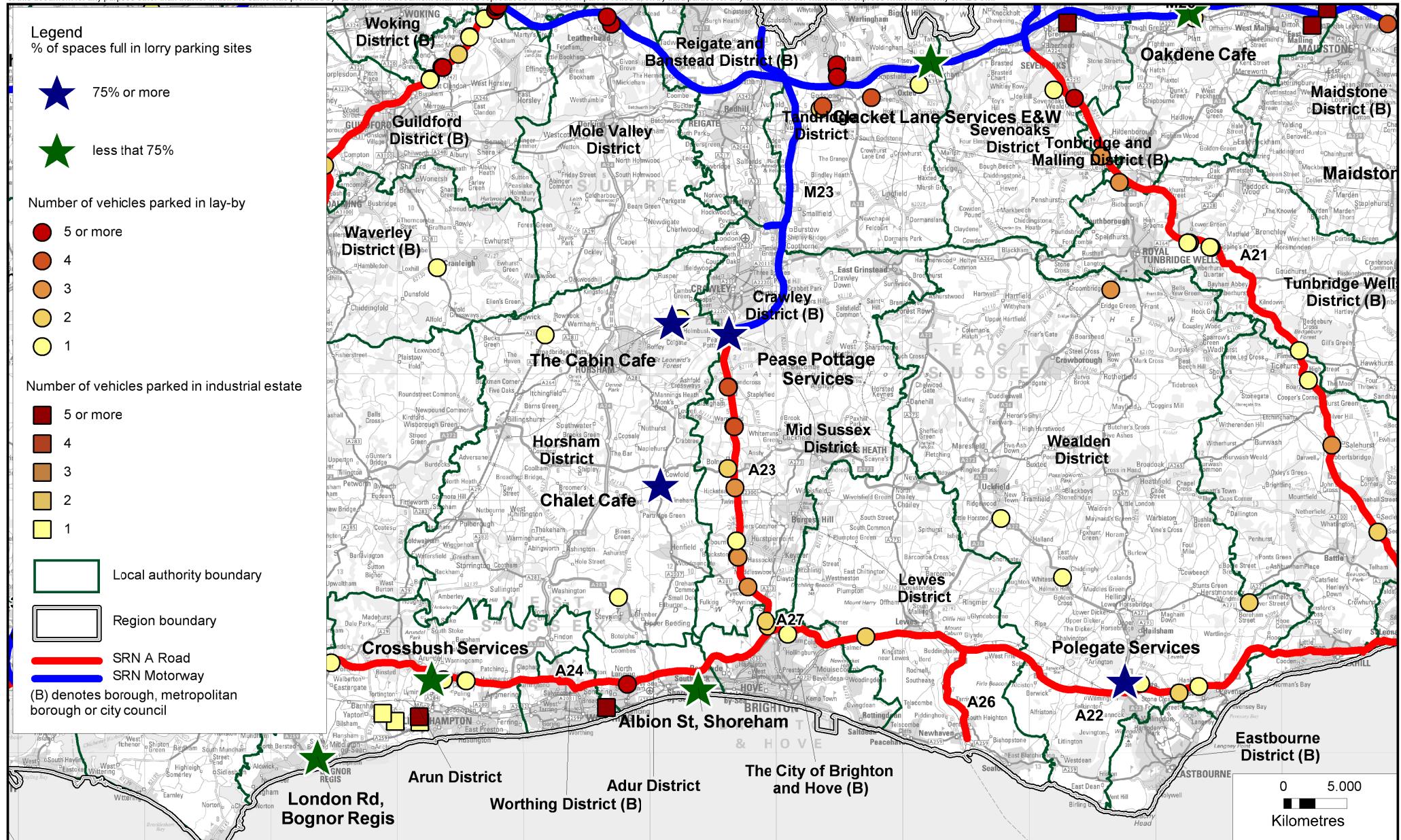
Project: Lorry Parking Study

Title: South East:
Off-site parking in
lay-bys and industrial estates
and use of lorry parking sites
eastern section

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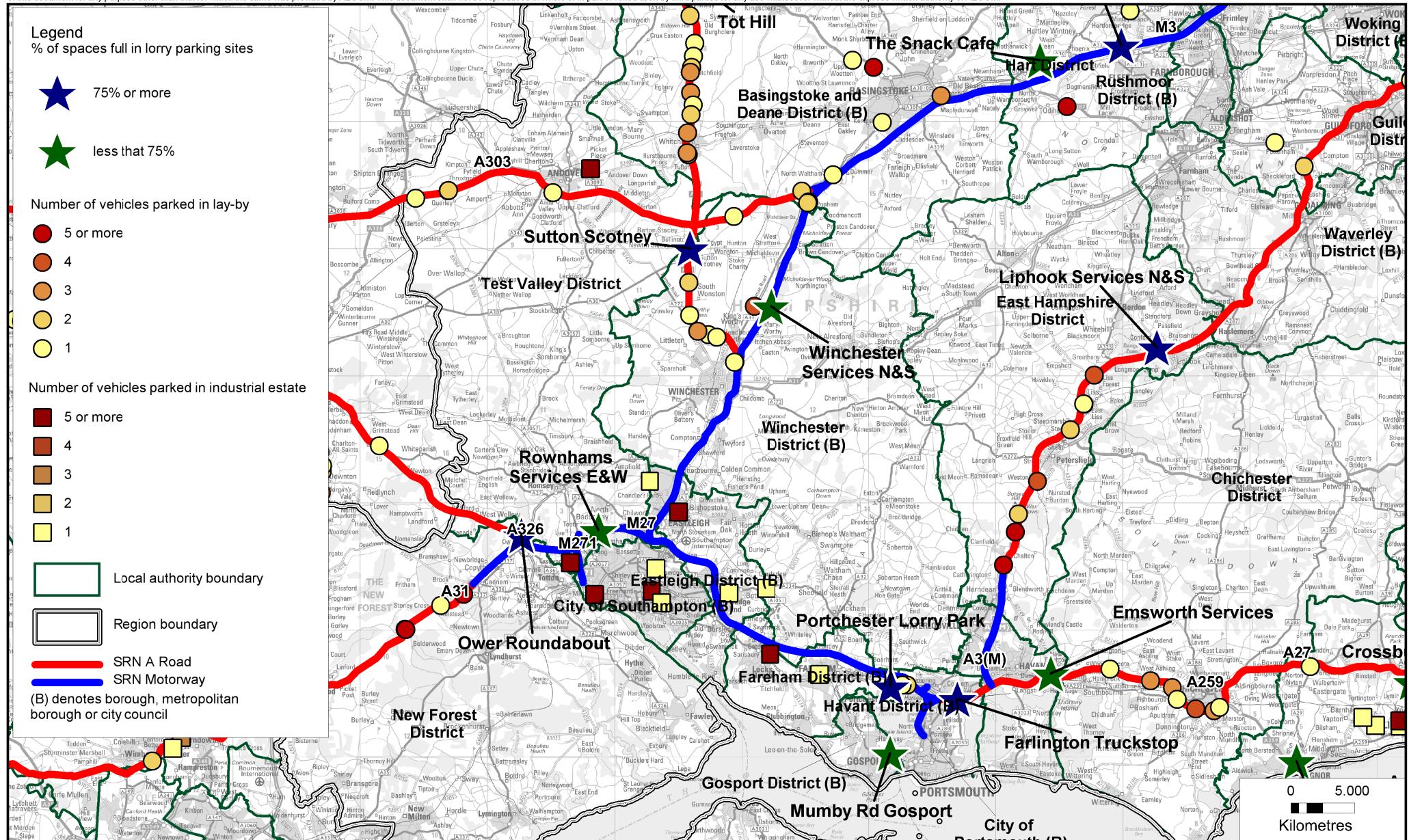
Project: Lorry Parking Study

Title: South East:
Off-site parking in
lay-bys and industrial estates
and use of lorry parking sites
central section

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Date: 21.06.11 Scale: 1:463,200
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Client: Department for Transport

Project: Lorry Parking Study

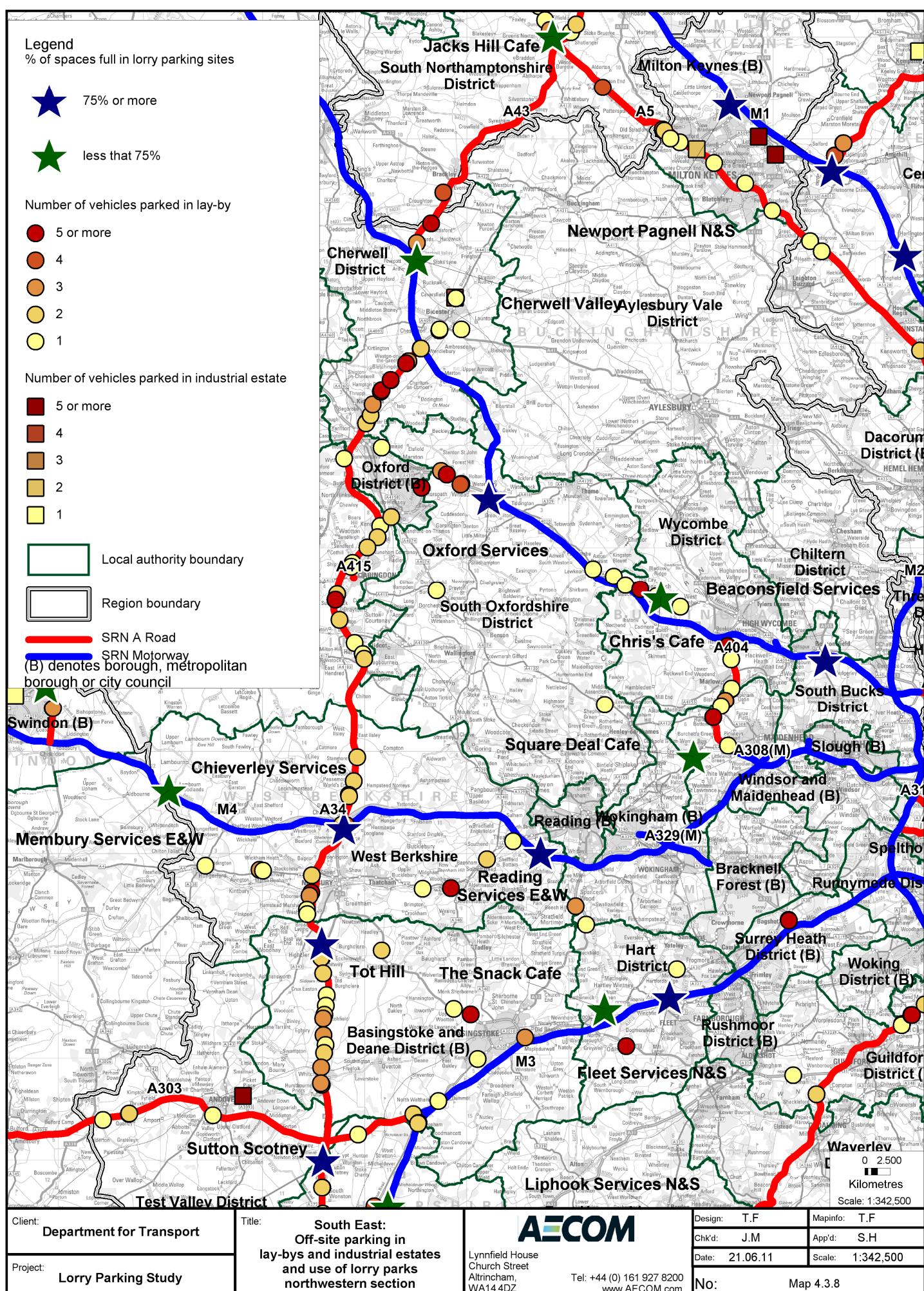
Title: South East:
Off-site parking in
lay-bys and industrial estates
and use of lorry parking sites
southwestern section

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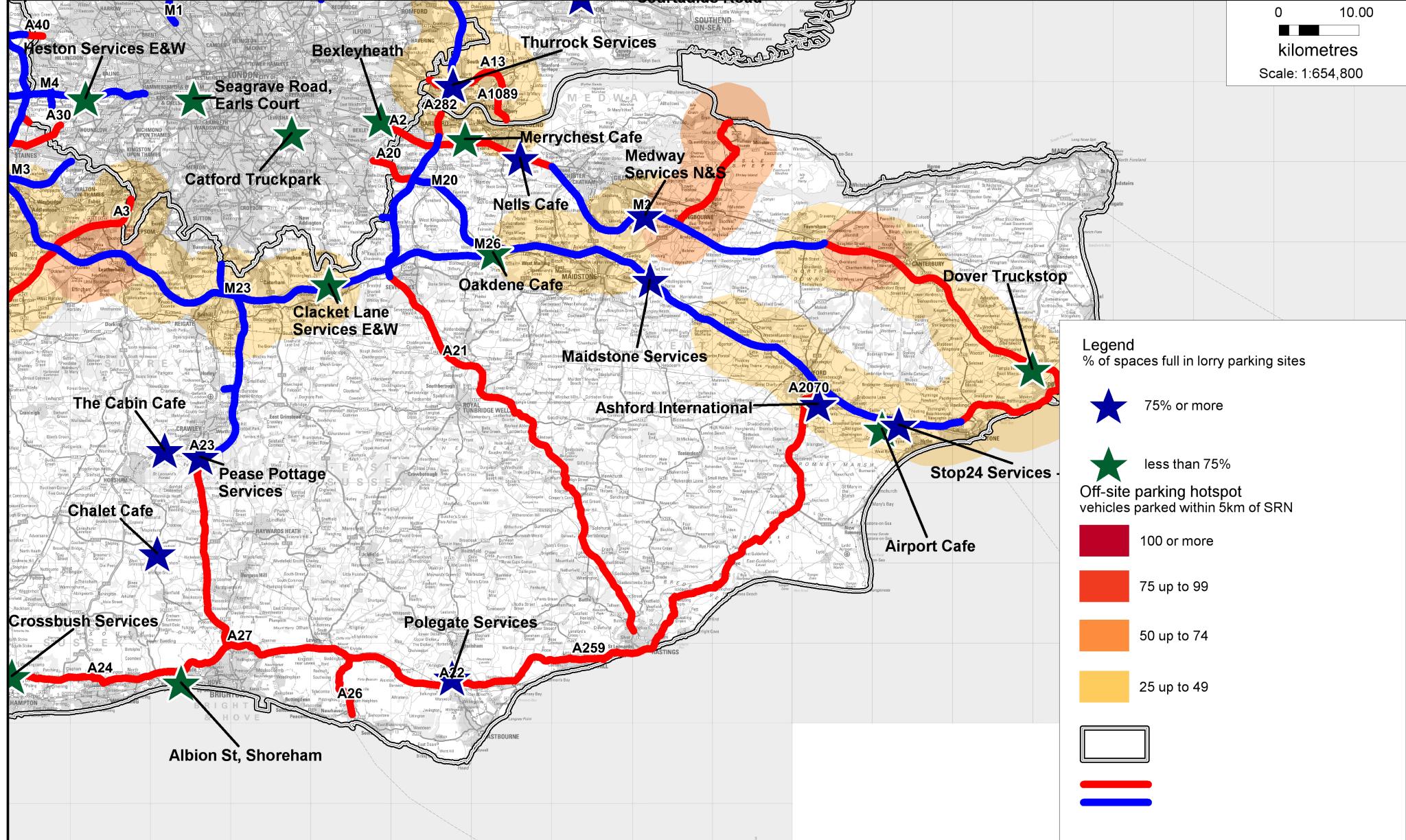
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Date:	21.06.11	Scale:	1:463,300
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kilometres
Scale: 1:654,800



Client: Department for Transport

Project: Lorry Parking Study

Title: South East:
Off-site parking hotspots
and use of lorry parking sites
Part 1

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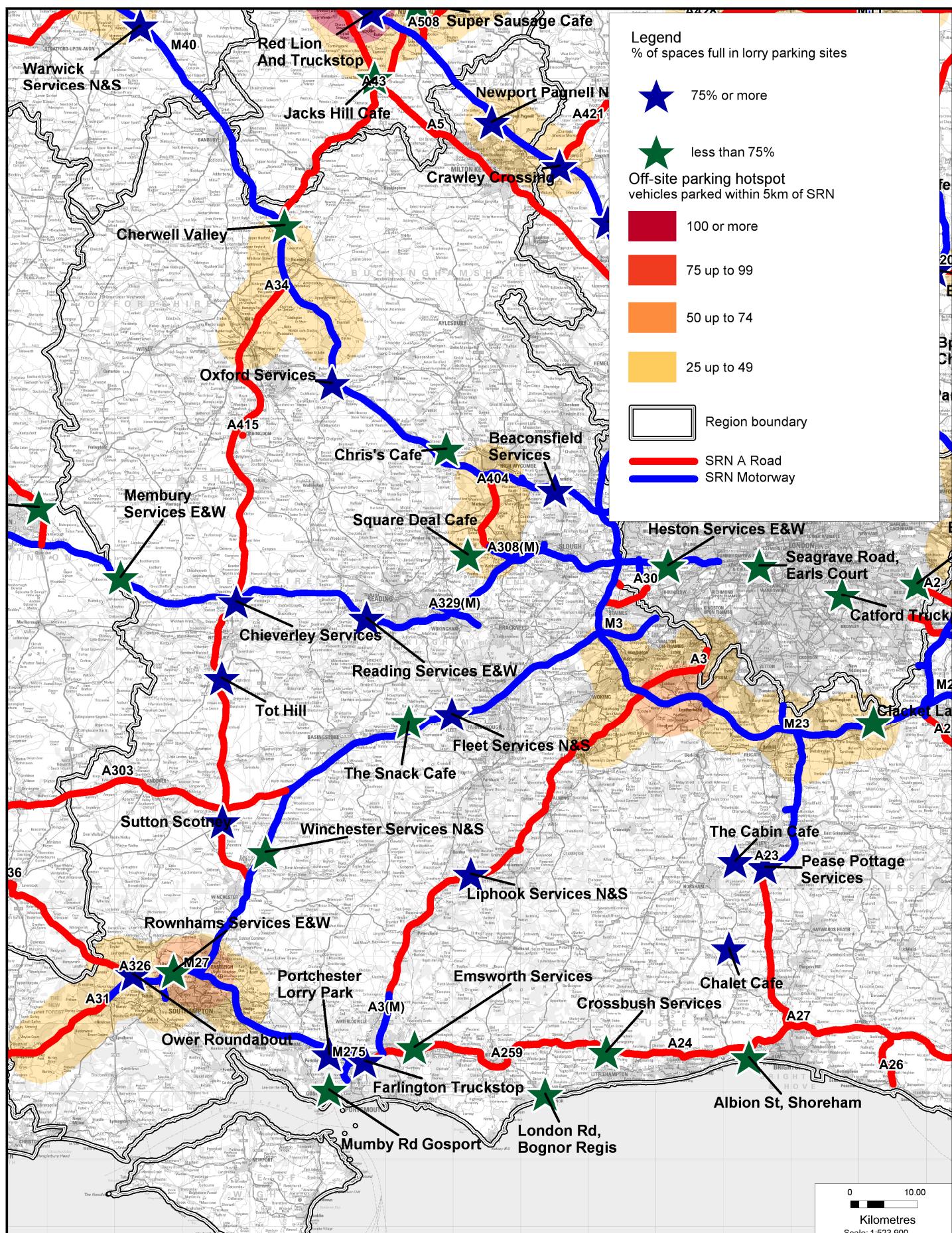
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Date: 21.06.11

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No: Map 4.7.9



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Scale: 1:523,900

Client: Department for Transport

Project: Lorry Parking Study

Title: South East:
Off-site parking hotspots
and use of lorry parking sites
Part 2

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Mapinfo: T.F

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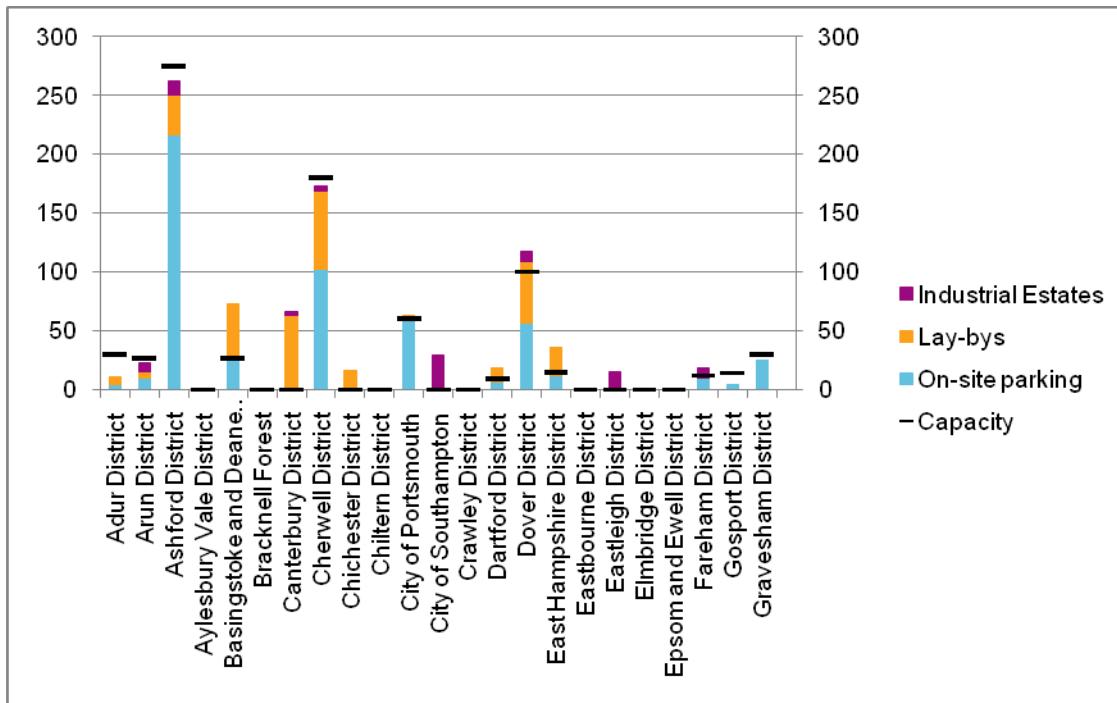
Map 4.7.9

Capabilities on project:
Transportation

4.7.5 Excess Demand

The charts below (figure 4.15, 4.16 and 4.17) shows the amount of on and off-site parking by local authority. Each column in the chart represents the total vehicles parked in the local authority broken down into on-site, lay-by and industrial estate. The black line denotes the amount of capacity in each authority, and where the column goes above the black line it shows there was an excess of vehicles parked. This chart aims to show whether there was spare capacity in lorry parks to accommodate all the vehicles in the region, and where vehicles were parking. For example, Milton Keynes had some available space on-site but even if the lorry parks were fully utilised there would still be significant off-site parking. When studying these graphs it is important to note that a high number of local authorities were very close to or above the black capacity line, indicating that the majority of the region was operating at or above capacity.

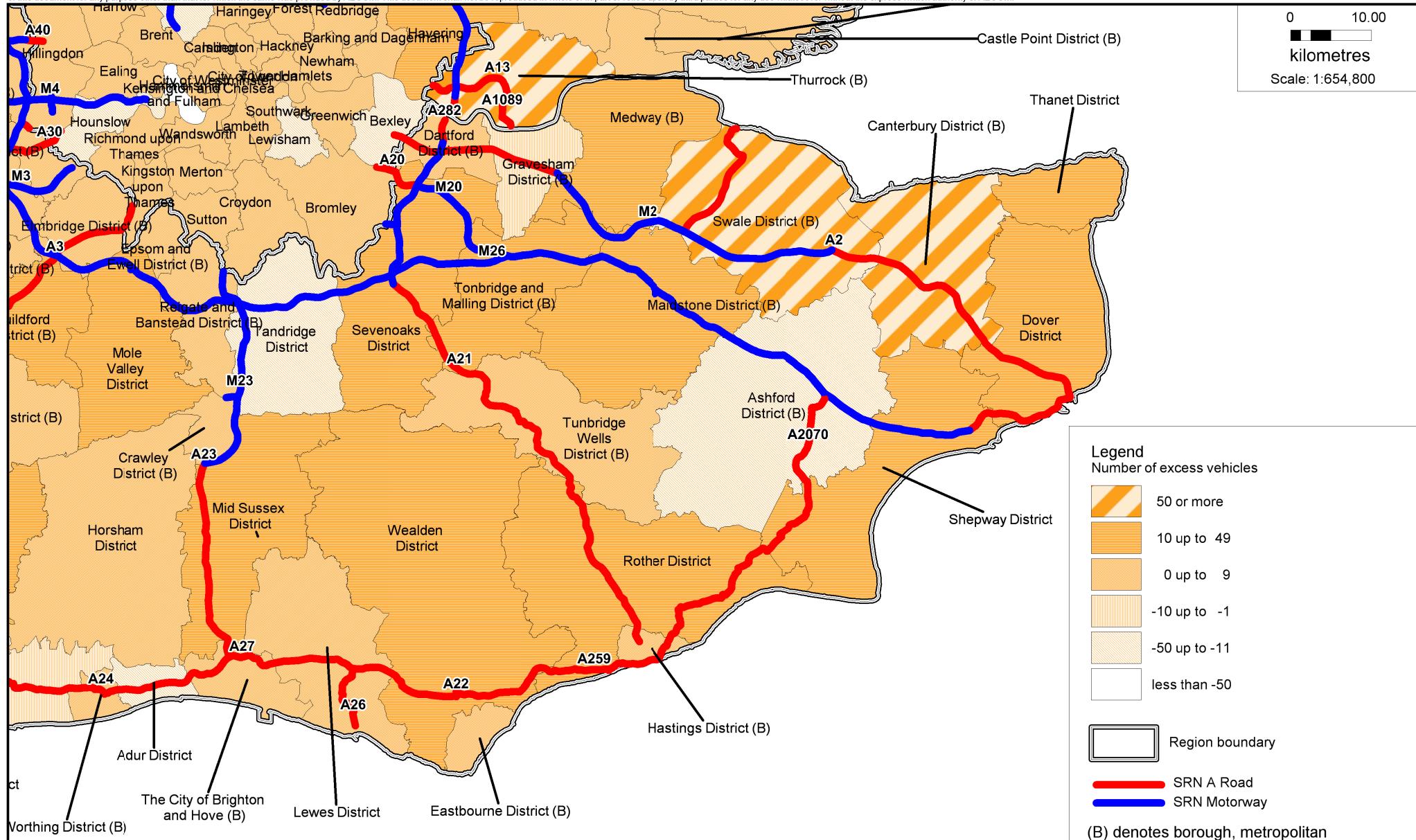
Figure 4.15: Graph of parking trends across local authorities in South East (A-Gr)



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kilometres

Scale: 1:654,800



Client: Department for Transport

Project: Lorry Parking Study

Title: South East:
Difference between number of vehicles
parked (on and off-site)
and capacity of lorry parking
Part 1

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Mapinfo: T.F

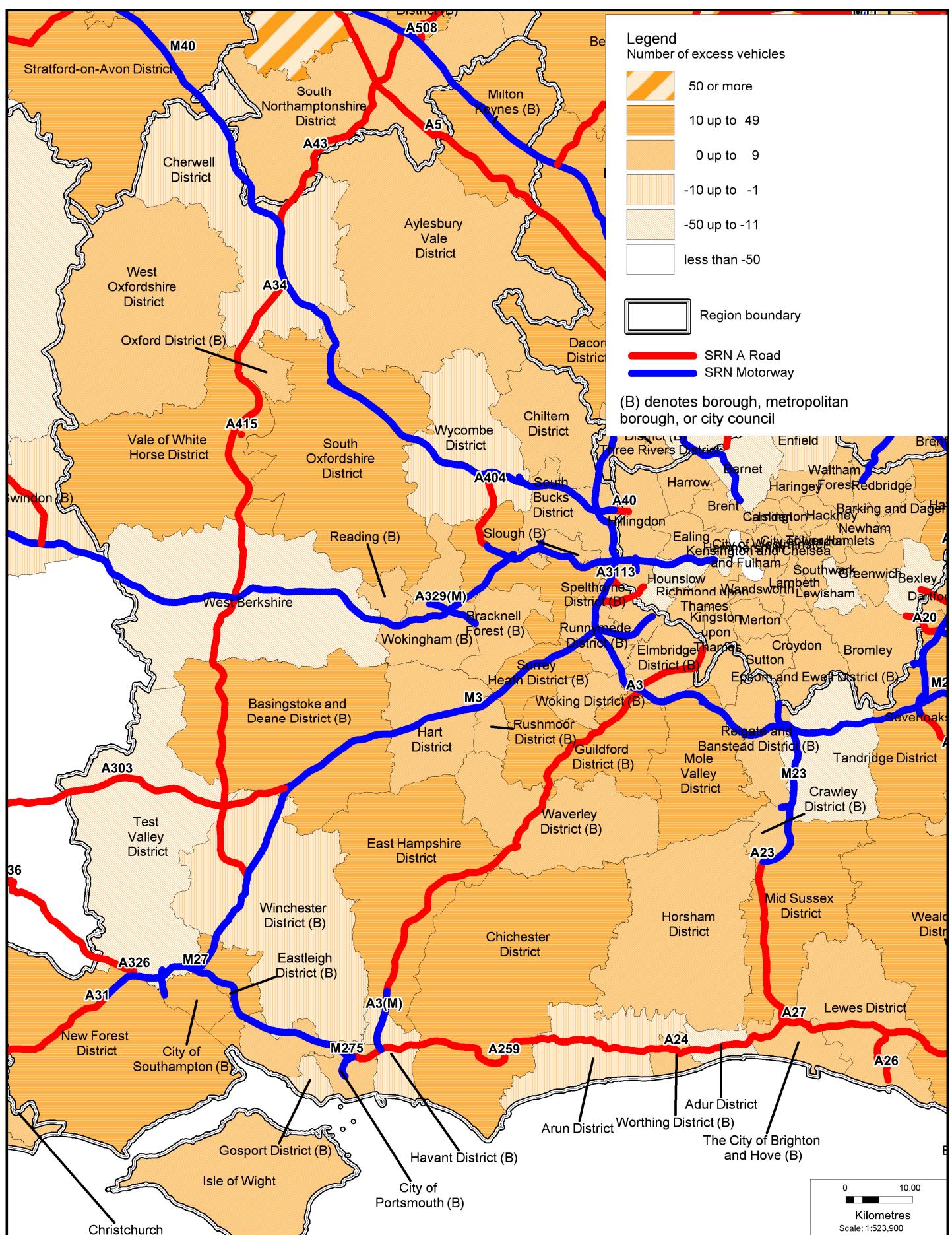
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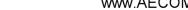
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Scale: 1: 1,654,800

No: Map 4.7.10



Client: Department for Transport	Title: South East: Difference between number of vehicles parked (on and off-site) and capacity of lorry parking Part 2	 Lynnfield House Church Street Altrincham, WA14 4DZ	Design: T.F Chk'd: J.M Date: 21.06.11	Mapinfo: T.F App'd: S.H Scale: 1:523,900
Project: Lorry Parking Study			Tel: +44 (0) 161 927 8200 www.AECOM.com	No: Map 4.7.10

Capabilities on project:
Transportation

Figure 4.16: Graph of parking trends across local authorities in South East (Gu-So)

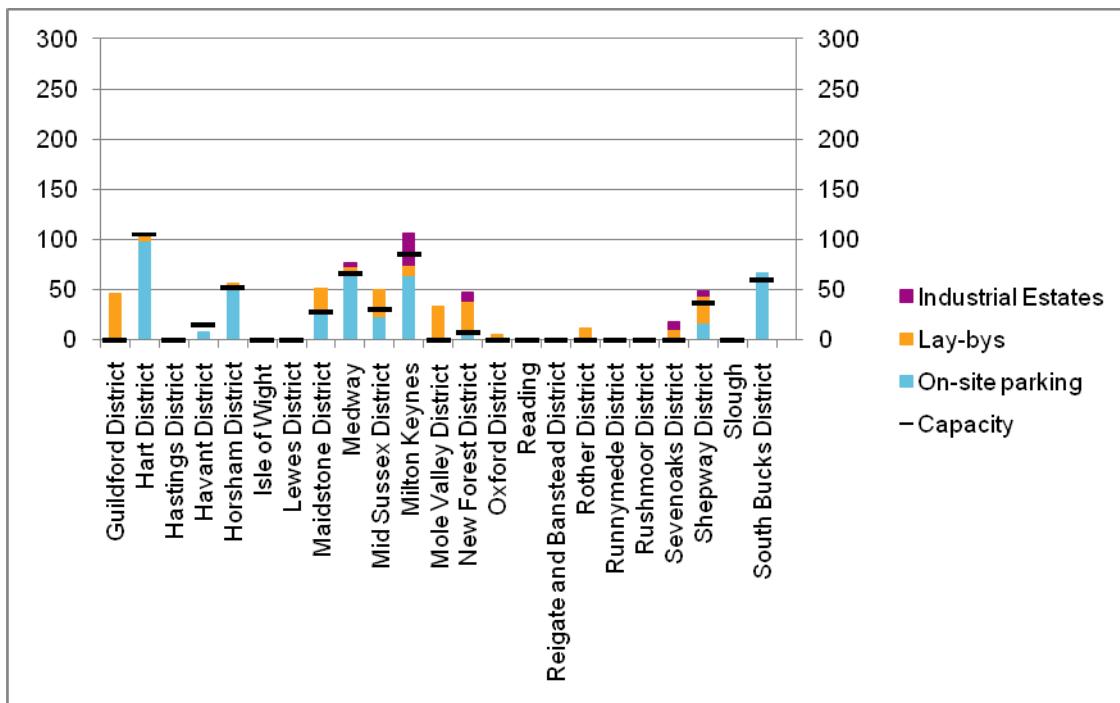
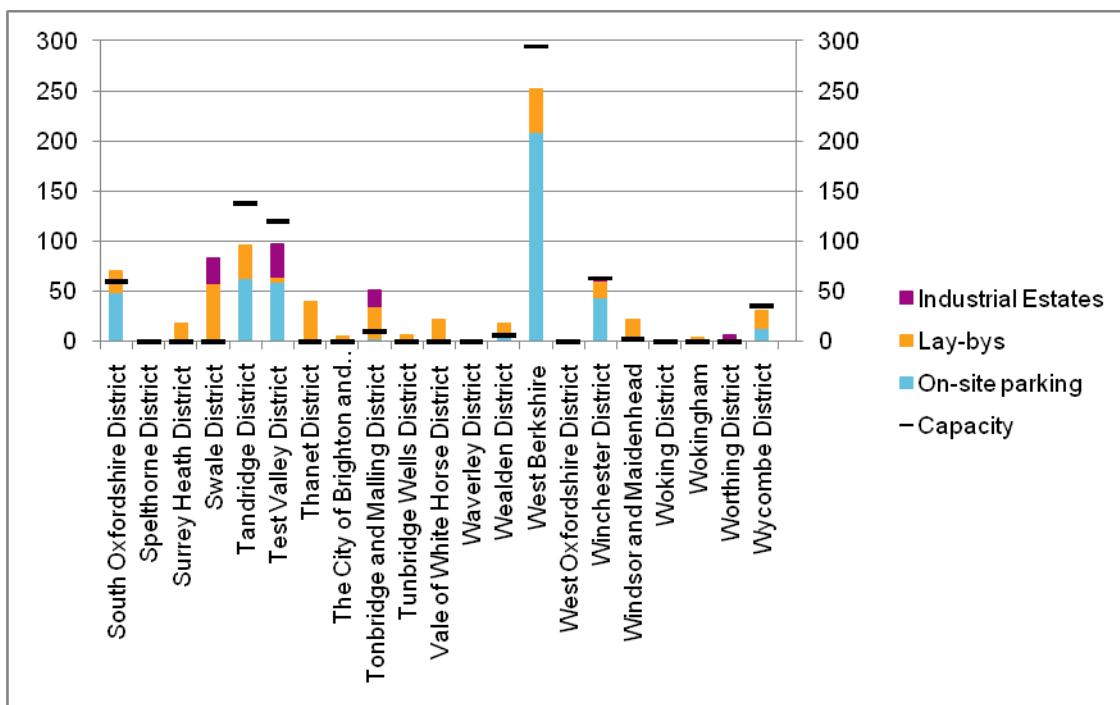


Figure 4.17: Graph of parking trends across local authorities in South East (So-Wy)



Capabilities on project:
Transportation

Map 4.7.10, Figure 4.15, 4.16 and 4.17 above highlight that parts of the South East had more vehicles parked than spaces. Basingstoke and Deane, Canterbury, Dover, and Milton Keynes had excess demand. A consideration for stakeholders under these circumstances is that if strategies were undertaken to try and move off-site vehicles to on-site facilities, there is limited space available. This may indicate a need to increase capacity.

These graphs combined with map 4.7.10 highlight clear problems, over half the local authorities in the South East had more vehicles parking than number of spaces. Notably Swale and Canterbury Districts had an excess demand of greater than 50. Furthermore, Thanet, Tonbridge and Malling, Mole Valley, Guildford, Basingstoke and Deane, Eastleigh, New Forest Districts all had an excess of between 25 and 50 vehicles. Only four local authorities had more than 10 spare spaces if all off-site vehicles were to be parked on-site.

Referring back to the hotspots identified earlier in section 4.7.3 (map 4.7.9) the hotspot around Ashford and Dover had several lorry parking sites nearby. Ashford International and Stop 24 Services were more than 75% as well as Dover Truckstop and Airport Cafe which were up to 75% full. There was no capacity on the A2 between Dover Truckstop and Medway Services, just less than 40 miles away.

Medway and Maidstone Services were more than 75% full. During peak periods of the year these sites may exceed capacity and have to turn vehicles away. This means that vehicles parking in the Maidstone to Sheerness hotspot would have to travel to Oakdene Cafe, which is some distance from the epicentre of the hotspot.

The only parking available near the M25 hotspot was Clacket Lane Services which was less than 75% full.

Rownhams Services near Southampton was less than 75% utilised. However, the majority of parking was in industrial estates and may be less likely to park on-site than lay-by parking.

Capabilities on project:
Transportation

Figure 4.18: Split of different parking areas across UK and non-UK vehicle types in the South East

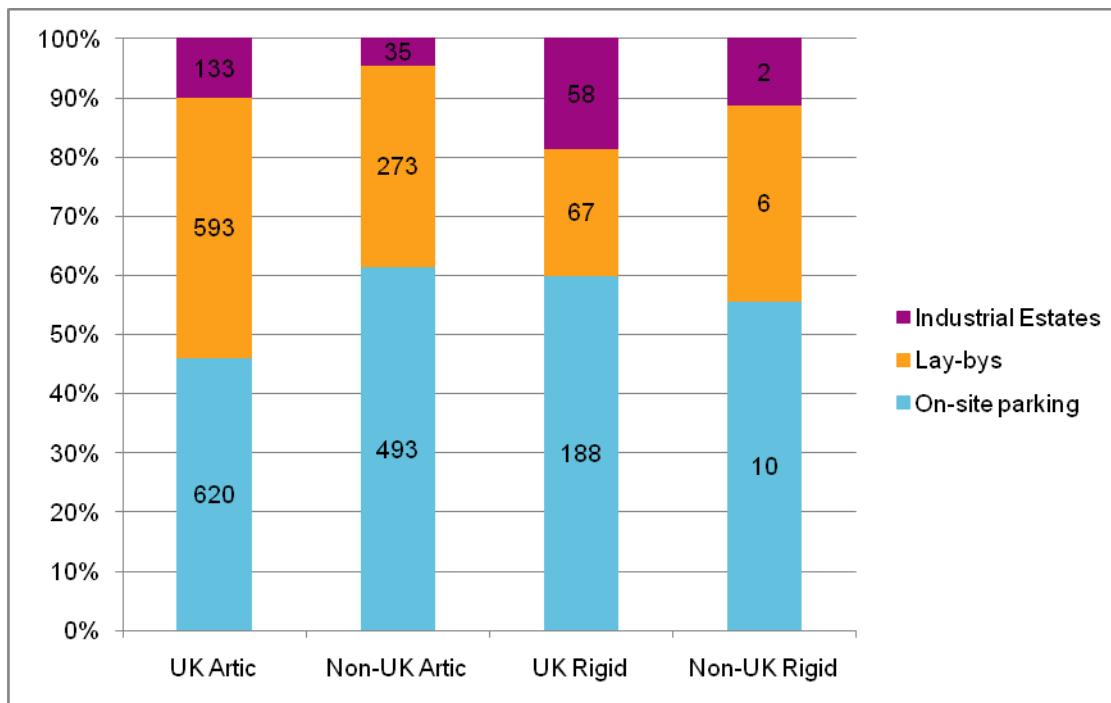


Figure 4.18 above shows the split of how different vehicle types park on-site, in lay-bys or industrial estates. This shows that although UK articulated vehicles account for the majority of on-site parking, over 50% of UK registered articulated vehicles were also parking in lay-bys or industrial estates.

In the South East UK registered vehicles were slightly less likely to park on-site than non-UK registered vehicles. However, there was still a high number of non-UK registered vehicles parking off-site. Therefore, encouraging non-UK vehicles to park on-site rather than in lay-bys and industrial estates may require different sets of strategies. It is important to note that approximately 36% of all non-UK registered vehicles parking off-site were located in the South East.

Capabilities on project:
Transportation

4.7.6 Crime Analysis

Road freight crime in the South East was relatively high with 348 crimes being reported in 2010. These crimes cost the industry an estimated £8.7 million. The crimes were concentrated in two areas. The first was the corridor between London and Dover, which is an extremely busy freight route with a high amount of daily traffic. The second was to the west of London in the wedge formed by the M40 and M3, these routes along with the M5 carry goods to and from London and the South East to the West Midlands, Wales, South West and Ireland. They were therefore busy freight routes and an attractive target for organised crime.

West Berkshire had the highest number of reported crimes in 2010 with between 25 and 50. Cherwell in the north of the region and Medway, Tonbridge and Malling, Maidstone, Ashford, Swale and Dover in the southeast all had between 10 and 25 report crimes. Vale of the White Horse, South Oxfordshire, Reading, Basingstoke and Deane, Rushmoor, Windsor and Maidenhead, Slough, South Bucks, Dartford, Gravesham, Canterbury and Shepway Districts all had between 6 and 10 reported crimes each. The remaining local authorities in the region had less number of crimes reported.

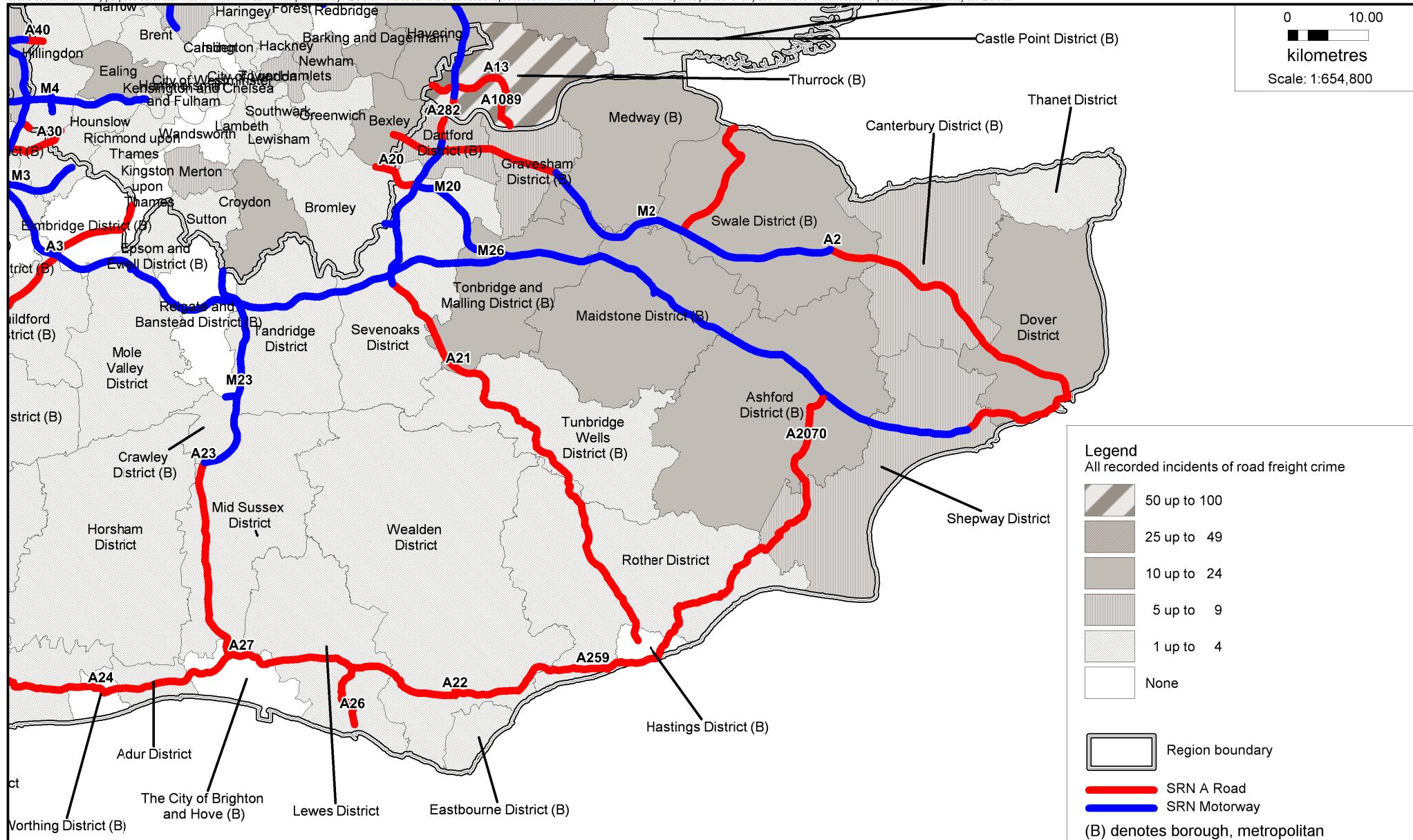
4.7.7 Summary

The South East provides key strategic links between England and continental Europe. The region as a whole was close to or at capacity on-site and also had a high level of off-site parking. Parking is especially concentrated between London and Dover on the M2 and M20. There was also a shortage of capacity around the southern section of the M25. As is the case nationally high levels of crime were generally linked to high levels of off-site parking and busy freight routes.

0 10.00

kilometres

Scale: 1:654,800



Legend
All recorded incidents of road freight crime

50 up to 100
25 up to 49
10 up to 24
5 up to 9
1 up to 4
None

Region boundary

SRN A Road
SRN Motorway

(B) denotes borough, metropolitan
borough or city council

Client: Department for Transport

Title: South East:
All recorded incidents of
road freight crime
Truckpol 2010
Part 1

Project: Lorry Parking Study

AECOM

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Church Street
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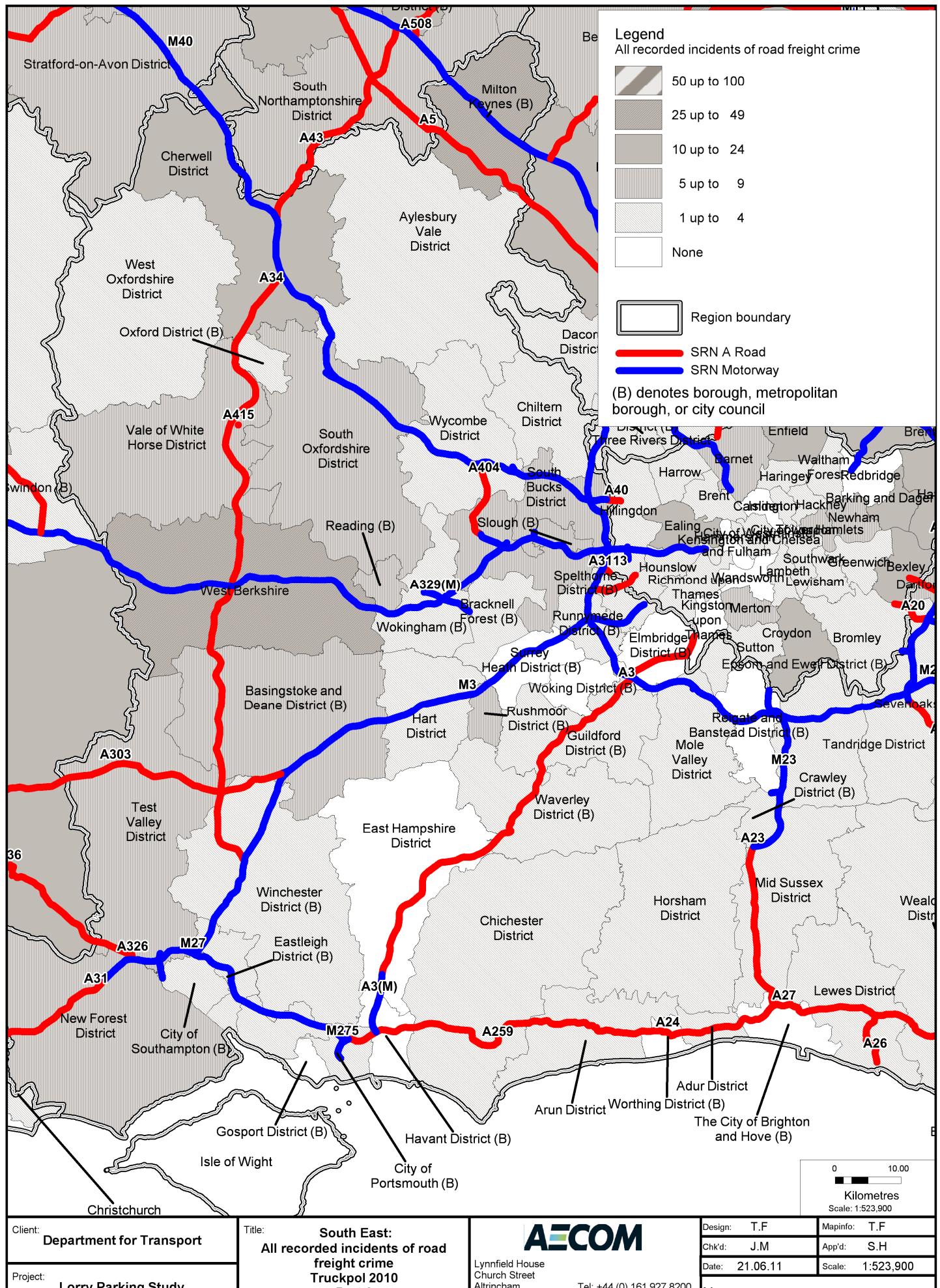
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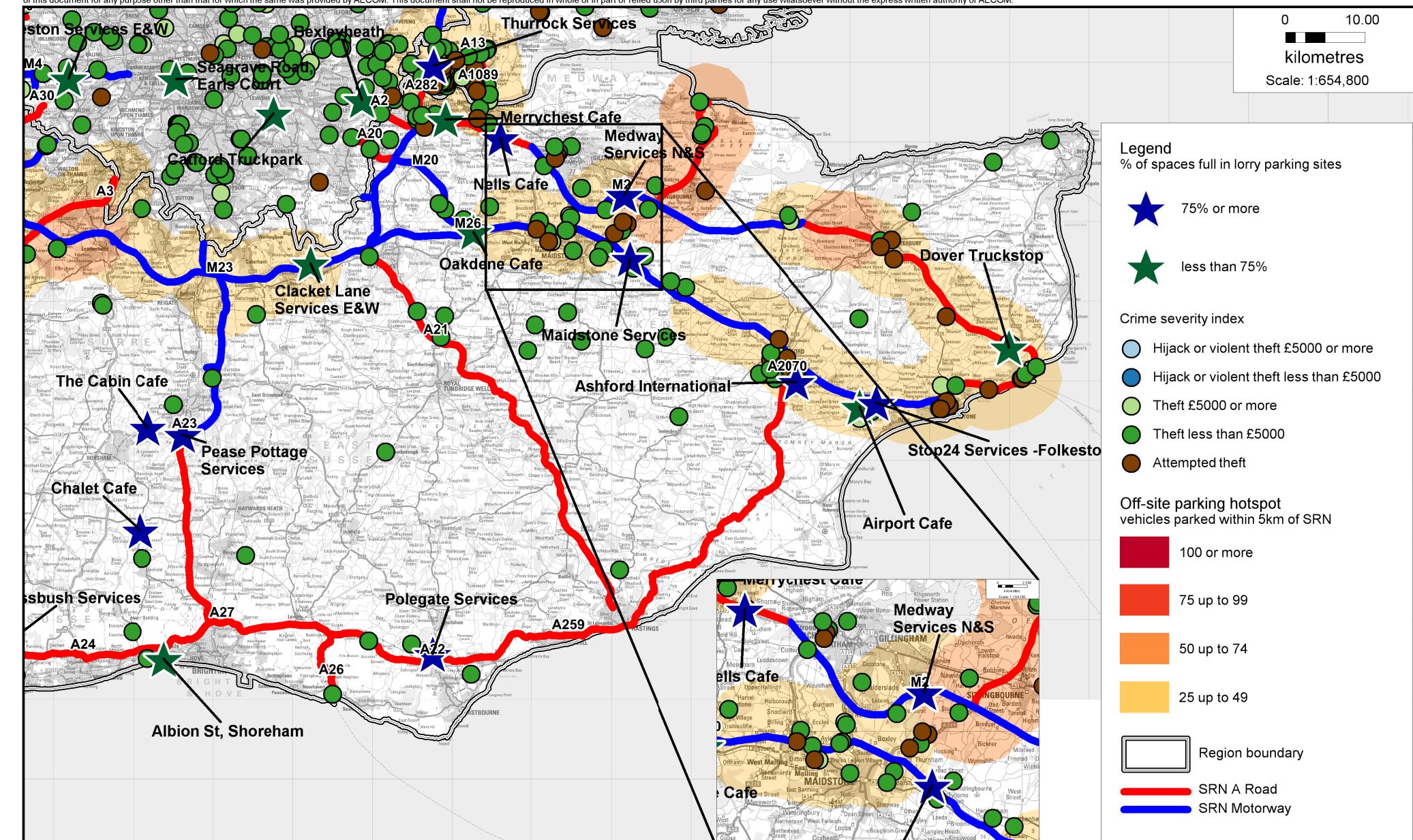
Chk'd: J.M App'd: S.H

Date: 21.06.11 Scale: 1: 1,654,800

No: Map 4.7.11



0 10.00
kilometres
Scale: 1:654,800



Client: Department for Transport

Project: Lorry Parking Study

Title: South East:
Severity of all recorded
road freight crime in relation
to off-site parking hotspots
and onsite utilisation
Part 1

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Date: 21.06.11

Scale: 1: 1,654,800

No: Map 4.7.12

