



# MANUAL FOR TRAVEL PLANS MONITORING GUIDANCE



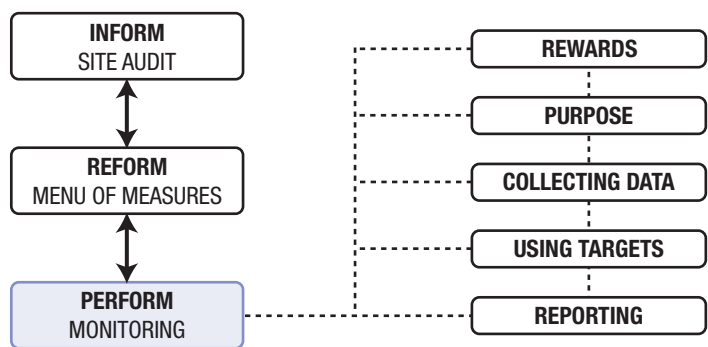
# FIND OUT WHAT'S WORKING - AND WHY

Monitoring Guidance provides information about finding out what smarter travel choices are proving to be the most popular (and effective) and why – and what people think about their travel options.

## ADVICE

- The rewards of smarter travel
- Getting information about travel patterns
- Reporting on how people travel
- Planning for sustainable travel and using targets

## WHY FIND OUT WHAT'S WORKING AND WHY



The **Manual for Travel Plans** is divided into three documents. The **Monitoring Guidance** shows you how to collect data and analyse the rewards from your travel plan.

Individuals stand to be rewarded by smarter travel choices in a number of ways – health, money, and a better feeling about themselves. This can help organisations by increasing employee productivity in the workplace and creating a good corporate image.

Knowing what is working and delivering results is a key part of the management framework for travel plans – Challenges (inform), Actions (reform), and Results (perform) ('CAR'). This part of the Manual for Travel Plans – the Monitoring Guidance – shows you how to collect data and analyse the rewards of your travel plan.

The monitoring of a travel plan is a good opportunity for consulting staff or residents on what they know (and think) about their transport options – and how these help them carry out their lives and work. Setting targets for how people travel can provide a focus for the travel plan.

Providing a benchmark for travel (in terms of the number of journeys, distances travelled, carbon dioxide emissions, or business expenditure) will ensure that the travel plan help to improve business efficiency and the health and happiness of staff (inside and outside the workplace). Facing this direction of travel will help you reduce your carborne journeys.

# REWARDS

## THE REWARDS OF IMPLEMENTING A TRAVEL PLAN

Travel plans provide a range of rewards.

Travel plans contribute towards outcomes in the Local Transport Plan (LTP) for Somerset, helping to improve road safety, accessibility to destinations, and reducing levels of air pollution and congestion. They contribute positively towards dealing with wider issues to do with quality of life and protecting the global climate. They help to deliver progress towards the following wider sustainable development goals:



Social factors - fair and equal access



Economic factors - financial rewards to businesses and individuals in terms of profits and productivity



Environmental factors - reduced carbon emissions and other types of environmental impact (often with knock-on rewards for human health)

**At the level of the travel plan, however, these broad benefits can be difficult to monitor.**

Government guidance advises that travel plans introduced through the planning system should have the following more specific objectives:

### OBJECTIVES OF TRAVEL PLANS AS USED IN THE PLANNING SYSTEM

(Source: Using the Planning Process to Secure Travel Plans, p18)




- Traffic reduction and sustainable transport objectives set out in national, regional and local policies
- Improved accessibility by sustainable modes of transport whilst addressing traffic and parking issues as well as widening the choice of travel modes for all those travelling to/from the site
- Representative of good practice and acting as an educational tool to encourage people to reduce inappropriate and unnecessary vehicle use

# WHY SHOULD WE BOTHER?

## THE ADVANTAGES OF HAVING A TRAVEL PLAN

The range of intermediate-level rewards resulting from actions in a travel plan may be sub-divided into categories, below:

 To individuals	 To organisations	 To the wider world
<p>Staff get more <b>exercise</b>. Exercise burns up carbohydrates which might otherwise be stored as fat. The World Health Organisation has officially prescribed each of us moderate exercise for half an hour five times a week. This is in the face of epidemic levels of cardiac disease and obesity. This can fit in perfectly with walking or cycling to work (Source: Essential Guide to Travel Planning, p7)</p>	<p>Local impacts such as <b>community barriers, traffic, parking, and noise and air pollution</b> are reduced. This can improve the reputation of companies in the local community.</p>	<p>A travel plan can typically <b>reduce car driver trips to a site by 15%</b> over three years (Source: Essential Guide to Travel Planning, p17). There are fewer cars and less traffic and wear and tear on the roads. If implemented across Somerset, this would mean reducing the current travel to work mode share from journeys from 54% single person car journeys down to 46%. For an organisation of 50 people, this can be achieved by changing the regular travel behaviour of only four staff members towards alternative modes.</p>
<p>People feel as if they are <b>doing their bit</b> to improve the quality of their life</p>	<p>The predictability of <b>journey times</b> are improved through lower levels of congestion around the site</p>	<p>Increased use is made of public transport, walking and cycling routes, helping the local authority meet its targets and encouraging <b>further investment</b></p>
<p>The need to <b>own and run a car</b> (or second car) is reduced</p>	<p>Companies can improve their reputation through responsible travel policies, and demonstrate a high level of <b>business acumen</b> to potential customers and partners, as well as their staff</p>	<p>Energy used for transport is reduced. If people use the more popular bus routes (with more people per bus), they can make big reductions in terms of their <b>carbon footprint</b> compared to travelling alone by car (Source: How We Can Save the Planet)</p>
<p>People covered by a travel plan have <b>broader mix of travel options</b> to choose from. They also gain a social awareness of the impact of their travel choices on themselves, on others, and on the global environment</p>	<p>The <b>customer catchment area and staff recruitment base</b> is broadened to include non-car users/owners. Good access to the site and low levels of congestion can also help with marketing</p>	<p><b>Space</b> is not taken up by cars which are left stationary for most of the day, and can be put to more economically productive uses, e.g. new buildings/ office space or short-stay parking</p>
<p>Staff involved in coordinating and implementing the travel plan can gain <b>skills and work experience</b> which will be of value to them in their current job and future careers</p>	<p>Customers have a better experience travelling to the site – a happier shopper may lead to a <b>higher level of spending</b>. Other visitors are likely to come back and have a better impression of your organisation.</p>	

 To individuals	 To organisations	 To the wider world
Staff may find they have more disposable income from getting cheaper <b>travel to work</b> , e.g. cycling, car sharing, subsidised public transport or using flexible working to travel off-peak	<b>Equal opportunities</b> policies are adhered to, and staff are not discriminated against on the basis of their travel choices – a culture of car use and dependency is addressed.	
Travelling collectively by not driving privately to work in a car (including car sharing) can bring <b>social benefits</b> in a way that driving alone does not provide	Travel plans contribute towards other corporate responsibilities such as <b>Health &amp; Safety</b> in the workplace and <b>environmental management</b> , and corporate reporting on CO <sub>2</sub> emissions	
Car and vehicle fleet <b>running costs</b> , including maintenance and depreciation, are reduced		
Buses and trains have much <b>lower rates of accidents</b> per passenger than for driving		
The <b>morale</b> of 'green collar' workers is improved, as they feel supported by the efforts of the organisation to improve the availability of transport options and contribute towards sustainability. They may remain more loyal to your organisation, <b>reducing recruitment and retraining costs</b>		
<b>Time spent travelling</b> can be used productively – to relax, work, observe, think, ponder, read, plan, organise, update a diary, or complete a task or puzzle. This can be rewarding to the individual and they can get work done on the move		
	Better-designed developments can yield <b>higher rent levels</b> , lower maintenance costs, and better regeneration rewards with increased levels of local support (Source: Manual for Streets, p51)	
<b>Smarter working</b> includes flexible working, tele or video-conferencing, home working and hot desking. This reduces the need for 'presenteeism' and for people to come into work. Promoting these policies as part of a travel plan can make <b>more profitable use of buildings</b> (e.g. as serviced office accommodation or touchdown hubs for other users), reduce personal travel costs and remove the environmental costs of travelling to work		

## ARE YOU WITH US ?

**+ MORE ABOUT** Further, additional advice about **monitoring** the achievement of some of these rewards is given in Section 2.2.3 of the Travel Plan Resources Pack for Employers, and Chapter 2 of Encouraging Sustainable Commuting, both available via the Resource Centre for travel plans on [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk).



### DEVELOPING THE BUSINESS CASE FOR SMARTER TRAVEL:

The Department for Transport has produced a cost calculator to work out the costs of business travel.

(Source: Essential Guide to Travel Planning, p49).

**+ MORE ABOUT** Further advice about **reducing business travel costs** is given under Using Targets in this guidance

### EXAMPLES OF THE REWARDS OF TWO-WHEELED TRANSPORT:

Certain modes of transport have their own rewards – motorcycling and cycling are two good examples:





## MOTORCYCLING:

- Quicker in congestion
- Lower running and often zero parking costs
- Smaller carbon footprint per mile than most cars
- Efficient in their use of road space, creating less congestion
- Take up less parking space
- Improved rider safety when accompanied by training programmes
- Employment accessible at times when public transport is reduced
- Facilitating freedom and carrying out multi-purpose trips combined with the daily commute

(Source: includes Guidelines for Motorcycling, p22)



## CYCLING:

- More time reliable
- Speedier in congested traffic
- Less stress inducing
- Inclusive of its own health rewards through pedal power and improved fitness - a rare opportunity to get fit away from the gym
- Inclusive of its own CO<sub>2</sub>-friendly power source
- Freedom of movement
- Take up little or no parking space
- Can be combined with other transport options, e.g. train for longer journeys/increased range

(Source: includes Essential Guide to Travel Planning, p50)

## MAKING THE CASE FOR INTRODUCING A TRAVEL PLAN

Answers to common questions are given below, which should help make the case for every site having its own travel plan.

**+ MORE ABOUT** Further advice about **ensuring a successfully-delivered travel plan as part of the planning process** will be available in separate Somerset County Council guidance to be made available in 2009. **+** Further advice about the **role of a travel coordinator** is given in the Exemplify section of the Menu of Measures, available as part of the Manual for Travel Plans via [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk). **+** Further general advice is given in the Travel Plan Resources Pack for Employers, available via the Resource Centre for travel plans on [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk).

- 1. We have to concentrate on the core business of the organisation** – spending time on travel plans is superfluous

All business activity involves some degree of travel. Levels of congestion and fuel costs are increasing – costing businesses money in transporting people and goods in traffic. The use of energy resources for transport is increasingly having knock-on effects on the costs of production and in business profits. Travel plans help reduce these impacts.

**+ MORE ABOUT** Further advice on the **rewards** of travel plans is given under Rewards of Implementing a Travel Plan in this section.

- 2. Flexible working is not an option for our staff** – they need to come into work and we need to be able to manage their time effectively

There are various types of flexible working. These range from allowing staff to go straight to off-site meetings without having to call into their work base first, all the way up to including arrangements for regularly working at home as part of staff contracts. Certain staff and types of work may be more suited to such arrangements than others. Staff are likely to view flexible working as a positive part of the travel plan, and it is relatively easy for the organisation to implement them without investing in alternative transport options or introducing parking restrictions.

**+ MORE ABOUT** Further advice about using **flexible working** as part of your travel plan is given in the Encourage section of the Menu of Measures, available as part of the Manual for Travel Plans via [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk).

- 3. Travel plans are anti-car** – people have a right to use their cars if they want to

**Travel plans are about prompting responsible car use – appropriate to certain journeys within a range of transport options**

Some people are very attached to their cars. Travel plans should take into account that some people will be more willing to change their behaviour than others, and people will modify their choice to varying degrees. It is important not to let a vocal, opposing minority cloud out a level of general acceptance for the rewards the travel plan can bring. As more

people take advantage of alternative travel options, these become more viable and those initially resisting the travel plan may be persuaded by peer pressure, good examples or a change in the culture of the organisation – even if it is only for one day a week. The negative impacts of road users coming to work one-by-one in cars is clear for everyone to see. People should be encouraged, if they want to, to reduce their car use, supported by policies and perks in the organisation where they work.

**+ MORE ABOUT** Further advice about **monitoring** your travel plan is given under How to Collect Data in this guidance. **+ Further information about encouraging behaviour change** is given in the Encourage section of the Menu of Measures, available as part of the Manual for Travel Plans via [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk).

"...there will always be some people who see travel initiatives in a negative light and it is possible for a few dissenters to have an outsize impact ... while not everyone will be able to change the way they travel, there are some who can and will."

*(Making Travel Plans Work, p29)*

**4. I don't believe climate change is an issue,** and if it were, the impact of my company on local traffic would be minute

Transport has a growing impact on the use of resources and energy, which results in threats to the longer-term sustainability of all businesses. Increasingly, emissions of carbon dioxide will be an important financial, corporate and ethical consideration for businesses who may be required to report their impacts on the environment. It makes sense to plan ahead to reduce these risks, before regulation takes over as the strictest solution. Travel plans promote the use of alternative modes to ensure a freer flowing, more efficient road network.

**+ MORE ABOUT** Further advice about facing the direction of travel and **reducing the level of your carborne journeys** is given in the Menu of Measures, available as part of the Manual for Travel Plans via [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk).

**5. Staff need their car for work.** Some staff also have commitments at the start and end of the day. Using alternative modes of transport for such trips is unreasonable

With good diary management, many people can find some days of the week where they don't need to take their car to work. Where there are alternatives, such as teleconferencing and pool vehicles, staff should be able to attend meetings by phone or car without having to bring their own vehicle in. Schemes such as a free lift home (e.g. by taxi) if your public transport or car sharing arrangement fails on a particular day are also popular. Some people have specific requirements for car use because of the stage in their life – having kids, caring responsibilities, or living somewhere inaccessible, are examples. As people's situations change, they should be encouraged to adopt more sustainable trip patterns and travel choices which will contribute towards the objectives of the travel plan. Although financial savings associated with commuting do not fall directly to the employer, other rewards of staff making these choices most certainly do.

**+ MORE ABOUT** Further advice about accommodating the **work-life balance** is given in the Encourage section of the Menu of Measures, available as part of the Manual for Travel Plans via [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk).

**6. Cycling and walking makes me hot and uncomfortable** – I have to arrive at work looking my best

Most short strides or rides do not involve much strenuous exercise. For those that do, employers should make sure staff have good facilities to change, shower and freshen up with ease and dignity. Some leading employers give rewards such as 10 minutes time-off in lieu per day for those who cycle or walk into work, and provide facilities such as cycle parking, lockers and showers. Travel plans can also promote events such as dress-down days, which help to change the culture away from a way of dressing that is only really suitable for those who drive into work. It is particularly important for high profile senior managers to be involved in these activities – not everyone has to wear lycra!

**+ MORE ABOUT** Further advice about **encouraging cycling and walking** at work is given in the Encourage section of Menu of Measures, available as part of the Manual for Travel Plans via [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk).



## 7. Public transport is inadequate, expensive or non-existent. Why should we expect our staff to use it to commute to work?

Public transport alternatives are generally better than people imagine they are. Improvements are being made year on year to local bus services. There are cases where public transport will not be an option. Where it is, employers can do more to support public transport users through providing information and discounts on tickets. Providing Somerset County Council with data about public transport use and staff needs and concerns through a travel plan can prove a useful tool in negotiating with transport operators to provide new or upgraded stops and services, to serve particular sites or shift patterns. Somerset has good rail links with London and the rest of the South West (Bristol, Plymouth, Exeter); staff should be encouraged to use these for business journeys wherever possible. There are also a number of flexible transport services in the area such as Yeovil, which are designed to be accessible to people living in rural areas and working in towns.

**+ MORE ABOUT** Further advice about **public transport** in Somerset is given in the Educate and Enable sections of the Menu of Measures, available as part of the Manual for Travel Plans, and via the Resource Centre for travel plans via [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk). **+** Further information on what **public transport** is available, Somerset County Council's opinion of services, operational goals for those services and potential for any new services is available by contacting Transporting Somerset via the Resource Centre for travel plans on [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk).

## 8. Alternative modes of transport are a waste of time for business journeys in the course of work.

Public transport has a number of advantages over private car travel. Buses can drop you right in the middle of town, without needing to find a parking space or park. You can also catch them from a number of different spots, rather than having to return to the same parking space. The time spent travelling can be used more usefully to work on the move. Somerset is a great place to travel through, and staff will arrive refreshed and feeling more productive.



**+ MORE ABOUT** Further advice about what Somerset has to offer in terms of **leisure and tourism** is available from Visit Somerset via the links on [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk).

## 9. Company cars are a part of the employment package – the travel plan expects us to abolish them?

Company cars can confer an image of support for car use in the course of work. Because they are often used by more senior staff, they can influence the attitudes of mainstream staff towards car ownership and use as the default option. They are also used as a symbol of reward and give status to the user – taking status away from other modes of transport such as walking, cycling and public transport use. This can be unhelpful in the context of trying to promote sustainable travel as part of the travel plan.

**+ MORE ABOUT** Further advice about dealing with **company cars** as part of your staff travel policies is given in the Encourage section of the Menu of Measures, available as part of the Manual for Travel Plans via [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk).

## 10. My organisation is small – why does it need to have a travel plan?

Every little counts. Developing travel policies to ensure accessibility to a site, however small, can help ensure the long-term viability of your business and ensure it is open to a range of customers and new recruits. Implementing a travel plan in a smaller organisation will be easier – the personal touch means it is simpler to engage staff, and there are fewer departmental silos to break down.

“Even if your organisation is small, with few employees, developing a travel plan to address aspects of travel associated with your activities is still a valuable and worthwhile exercise.”

*(Travel Plan Resources Pack for Employers, Summary)*

Travel plans can also be integrated into existing statutory responsibilities such as health, safety & welfare and corporate social responsibility, or sustainability objectives. Even if there are no local congestion or traffic issues, each trip still emits carbon which contributes towards climate change. Further advice is given below.



CUMULATIVE EFFECTS OF SMALL ACTIONS  
AND BEHAVIOUR CHANGES

For a small or medium-sized organisation, reducing car use may only mean persuading a few people to use the bus, cycle or try working at home.

**The travel plan should deliver real change to ensure that drivers are changing their travel habits, and it is not just cyclists and walkers who are trying different things.**

This all adds up to ensure a freer-flowing road network where everyone can get about more easily. Ensuring that all developments, no matter how small, adopt travel plans helps ensure that the maximum level of impact is achieved.

“[Travel plans] can be relevant for all land uses, for both speculative and known end-user applications, and for smaller developments, depending on the cumulative effect.”

*(Using the Planning Process to Secure Travel Plans, p9)*

At the same time, measures within each individual travel plan need to be chosen and designed to work with, rather than against, one another.

“The effectiveness of travel plans in achieving pre-determined outcomes generally relies on the way all the different measures, both behavioural and physical work together as an integrated package.”

*(Using the Planning Process to Secure Travel Plans, p9)*

# PURPOSE

## THE PURPOSE OF MONITORING A TRAVEL PLAN

“...if outcomes are not rigorously checked the travel plan may become nothing more than a token.”

*(Using the Planning Process to Secure Travel Plans, p65)*

**Monitoring surveys should be undertaken regularly as part of the travel plan.**

### **SURVEYS SHOULD:**

- Raise and test awareness of the travel plan itself and educate respondents about their travel opportunities
- Allow staff to express concerns about transport and contribute their ideas - to help bring about individual ownership of the travel plan
- Allow progress to be tracked according to the milestones (actions or targets) set out in the travel plan
- Flag up people who may be willing to partake in further idea-generating workshops, travel-focused groups or clubs

**Travel plans must be informed by a firm evidence base.**

**+ MORE ABOUT** A site audit is used to ground the travel plan in the nature of the physical and travel conditions surrounding the site. Further advice about carrying out a **site audit** is given in the Site Audit and Design Guidelines, available as part of the Manual for Travel Plans via [www.movingSomersetforward.co.uk](http://www.movingSomersetforward.co.uk).

# COLLECTING DATA

## HOW TO COLLECT TRAVEL DATA THROUGH SURVEYS

A travel survey can help base the travel plan on people's views and perceptions of these services and opportunities offered by them:



### THINGS TO ASK ABOUT:

- How people travel and what alternative travel options people have
- How likely the travel plan is to change people's behaviour, including factors that motivate their travel choices

### + MORE ABOUT

Further detailed information about **questions to ask** is given under What to Ask in this guidance.

Questionnaires are the most common method of monitoring travel plans, and are focused on here.

## INITIAL AND REPEAT SURVEYS

**The timing of the questionnaire should be given consideration.**

An initial survey should be done when the travel plan is being prepared – to inform its design and content.

Follow-up 'review' surveys should be undertaken annually to monitor how well the travel plan is performing; these need not be as detailed, and will therefore be less costly and simpler to implement.

### TIMING OF THE SURVEYS

You should try to:

- Avoid peak holiday periods
- Avoid Mondays and Fridays (people tend to travel more sustainably than usual on a Monday, and more people are away from work on Fridays but those who do come in tend to drive) – Tuesdays and Thursdays tend to be the most typical days
- Undertake the survey during spring or autumn – using the same month each year (e.g. March, April, May, June, September or October) avoiding school holidays. Motorcycle use is characterised both by its flexibility and seasonality, with usage in November and March being around 40% lower than average (Source: Guidelines for Motorcycling, p38-39)
- Ensure comparable weather conditions, e.g. by choosing one week in which to carry out the survey and then selecting a specific day nearer the time using forecasts. Record weather conditions on the day the survey was undertaken
- Avoid overlap or confusion with other surveys in the organisation (integrate the surveys if this works best)
- Keep a note of any confounding variables that may affect how representative the results of the survey are, e.g. bad weather, local roadworks/rail engineering/building work, fuel crisis, etc.

(Sources include: Travel Plan Resources Pack for Employers, Section 7.1)

### LINKS TO INCENTIVES:

Anyone taking advantage of incentives offered by an organisation should be asked to commit to providing monitoring data about how their travel behaviour, habits and patterns have changed as a result of this incentive - allowing you to assess its value and effectiveness.

## USING OTHER WAYS TO COLLECT THE DATA:

- Internet voting buttons on occasional days throughout the year
- Signing-in sheets for visitors at reception desks indicating mode of transport used (not just registration number)
- Comments/complaints slips for travel issues or ideas boxes
- Leavers' questionnaires
- Surveys of existing local community to evaluate impacts of site operations on local areas and collect opinions and ideas
- Longer-term travel 'diaries'
- Focus groups/other collective meeting groups or forums

Methods such as focus groups and interviews with managers of various departments can work well, as can other forums such as working or steering groups. These can be used to complement the travel plan survey.

**“Focus groups are generally fun to lead and interesting for those involved.”**

*(Travel Plan Resources Pack for Employers, Section 3.7.3)*

### SNAPSHOT SURVEYS:

Snapshot surveys (how a journey was carried out on one particular day – using a questionnaire or gate count) can help validate the self reporting of 'normal' travel habits. If these are done, you should find out from managers who is out of the office that day, e.g. on business.

**“...your travel plan is a continuous and ongoing process of monitoring and review, rather than a one-off event. ... By repeating the snapshot survey over time, you will find out whether your organisation is succeeding in persuading fewer people to come by car and which alternatives are proving most successful.”**

*(Travel Plan Resources Pack for Employers, Section 7.1)*

## GETTING RESPONSES

**Questionnaires can be distributed on paper or electronically, but the general approach remains the same.**

It is recommended that you send out the survey to the whole workplace population, to give the maximum possible sample size. You should aim to get 200-300 responses, or at least 40% of your total workforce (or population) responding to the survey.

Ideally, matched-sampling should be used, which allows a respondent's answers year-on-year to be compared. This can be achieved by allocating a unique survey identification number to each respondent. This can better identify the exact trends in terms of how travel choices are changing, i.e. are users merely swapping one sustainable mode for another (e.g. a 'churn' from bus to cycle) or are car users really adopting new non-car travel habits?

### MARKETING THE SURVEY

The survey should be supported by a marketing plan, which includes providing reminders about filling in the survey. Some organisations offer a prize draw to encourage people to take the time to respond. Moving Forward may wish to do a travel show visit with a free prize draw, if you collect data for them on how your staff travel to work (Source: Essential Guide to Travel Planning, p24).

**“A good rate of return makes the survey more valuable and an incentive such as a prize draw is likely to be worthwhile.”**

*(Essential Guide to Travel Planning, p15)*

Whatever the incentives offered, a cover letter or statement from a senior member of the organisation should be included. This should emphasise the importance and purpose of the survey and the usefulness of the results in seeking to improve travel opportunities for everyone to and from the site.

## HOW TO DISTRIBUTE THE QUESTIONNAIRE

There are various ways to circulate your questionnaires, to gather the information needed for your travel plan.

- Internal post
- Inclusion with wage slips
- Attachment with internal email, or link to an online questionnaire
- By hand at site or building entrances as workers arrive to work – completed questionnaires can be returned in ballot boxes in canteens or at the end of the day. N.B. surveys should target all those who work on site, so care should be taken to survey those who are working at home as well as those parking off-site
- By roving interviewers visiting people at their work stations/ desks – this can make it easier to ensure that you get a sample of responses from each department
- Separate letter to home – personnel/HR departments often have addresses for all staff
- Using nominated office/department respondents for a team or area

Whatever method you use, it is important for non-email users, those who work away from a fixed base of work (e.g. home workers or site workers) and part-timers to be included in the survey. Steps must also be taken to survey those staff without access to a computer if an electronic survey method is chosen. Since some workers may be typically less well paid, they may be more likely to use travel alternatives (Source: Making Travel Plans Work, p44) or have additional out-of-hours travel needs. Some organisations have found that the inclusion of these types of workers can swing the balance between whether they meet their travel plan target or not.

“Paper-based surveys are still essential to reach staff who are not online, but email and intranet now provide the best means to contact many staff.”

*(Essential Guide to Travel Planning, p15)*

## USING DATA COLLECTED

Data gathered should be used to inform the selection and development of further measures in the travel plan. This process should be communicated back to all respondents who should receive full feedback from earlier survey results, to help sustain interest in - and generate more replies to - future surveys (Source: Making Travel Plans Work).

## WHO SHOULD COLLECT THE DATA

Someone will need to collect and analyse the results of the survey. Such skills may be already available in your organisation. Otherwise, bringing someone up to speed on this may count towards their professional development or be of use as a transferable skill in another business area.

Other options are employing a consultancy to do this work for you, or developing a relationship with local colleges who may be looking for projects for their students to complete as part of their course.

### WHO SHOULD CARRY OUT THE SURVEYS FOR TRAVEL PLANS SECURED THROUGH THE PLANNING PROCESS?

Many companies choose to contract out surveys and the monitoring of their travel plan. Where a travel plan is part of a planning agreement, independent monitoring or verification may be a requirement, e.g. using the Standard Assessment Method for Travel Plans. This will be discussed as part of the approval of the travel plan by Somerset County Council. Data must be robust to be used in enforcing travel plan agreements. Somerset County Council should be approached to agree the most suitable approach for particular sites.

**+ MORE ABOUT** Further advice on the **enforcement of travel plan targets** is available by contacting Moving Forward using the contact details on [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk). **+ Further advice about ensuring the robustness of data** with regards to targets is given under Using Targets in this guidance.



## NOTES ON DATA PROTECTION:

“If you store people’s names and addresses on a computer you will need to register under the Data Protection Act. If you carry out a physical [prize] draw from the pile of questionnaires, without entering names and addresses into the computer, you avoid the need to register.”

*(Travel Plan Resources Pack for Employers, Section 3.7)*

If you want to create a database of sustainable commuters from the results of your survey, you should make this clear on the questionnaire:

“If the respondent has given permission for data to be passed on in a form which allows for the respondent to be identified personally, the respondent must have the first been told to whom the information will be supplied and the purposes for which it will be used.”

*(Travel Plan Resources Pack for Employers, Section 3.11)*

**+ MORE ABOUT** Links to further advice about the **Data Protection Act**, including how to find out if your organisation is registered or not, is available via the Resource Centre for travel plans on [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk).

## WHAT TO ASK

**+ MORE ABOUT** A **sample questionnaire** is available via the Resource Centre for travel plans on [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk).

A survey should collect a range of information pertinent to the site in question.

The collection of data should consider:

**INDICATOR SELECTION** - What will be measured

**ENSURING CONSISTENCY OVER TIME** - When and how measurements will be taken

**AVOIDING DISTORTIONS IN FIGURES** - and finding ways of verifying the data

**COLLECTION METHOD** – collecting data in a useable format

**At the very least, you should collect data on the core indicators below, and report on the mandatory indicator related to single occupancy vehicle (SOV) use.**






The core indicators collect information on which mode of transport is used, the distances travelled, and the originating (or home) postcode.







These indicators should be collected as part of any monitoring process connected to a travel plan, particularly those forming part of development management as part of a planning application. It is equally important to ask questions about people's awareness and perception of their travel choices, as well as how they travel.

**+ MORE ABOUT** Further advice on the **stages of changing people's travel choices** is given in the Encourage section of the Menu of Measures, available as part of the Manual for Travel Plans via [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk).

A number of subsidiary or optional indicators which might be collected in other ways (outside of the survey) are suggested towards the end of this section.






# CORE SURVEY INDICATORS

Locus for focus	Indicator	Unit of measurement	How to ask the question	Presenting the data
 Car use/consistency of use of travel alternatives	Proportion of journeys made to work each year by each mode of transport (by the longest part by distance of the journey undertaken)	% (modal share)	<i>How often do you use the following methods of travel to get to your regular place of work?</i> <b>+ MORE ABOUT</b> Further information about modes of travel to ask about, including non-mobile access such as working at home, is given under How to Report the Survey Results in this guidance. N.B. It is important to ask number of days travelled by each mode, not simply how to you 'normally' get to work. Unless you ask about alternative modes, the success of the travel plan in establishing occasional use of alternative modes will not be found.	Pie chart
 Amount of active travel undertaken in the journey to work		% answering more than 10 minutes each way a day	<i>How many minutes walking or cycling do you do per day as part of your regular journey to work, e.g. walking to the rail station (each way)?</i> N.B Walking and cycling can be increased by the use of buses and trains	Pie chart
 Commuting distances from home	Total commuting mileages between homes and workplace	% (km per year by mode of transport across all transport users)	<i>What is the distance between your home and regular place of work?</i> N.B. The main places of home and work as used for claiming travel expenses should be use	Pie chart
 Commuting distances from home	Daily average commuting distances between homes and workplace by mode of travel	km (average) by mode of transport		Bar chart
 Carbon footprint	CO <sub>2</sub> emissions from travel by all modes of transport	kg per year by mode of transport across all transport users	<i>How many days a week do you usually work?</i> Use distance data from above. <i>What is your vehicle engine size?</i> <i>What fuel does your car use?</i> Use CO <sub>2</sub> /km data for different modes of travel from the Reporting section of this guidance. N.B. Multiply by 46 weeks, presuming leave/holidays and other time off work.	Pie chart

Locus for focus	Indicator	Unit of measurement	How to ask the question	Presenting the data
 Geographical distribution of staff	Home locations	Home postcodes	<i>Where do you travel to work from?</i>	Map
 Motivations, awareness, attitudes and knowledge	What level of importance people attach to travel choices as an aspect in their lives and their constraints on travel	% (categories of reasons)	<i>If you have changed your travel habits recently, please give the reason why?</i>  <i>Would you like to use your car less frequently for your journey to work?</i>	Bar chart
 Awareness of what alternatives people have to help them make the change (or sustain their use of) more sustainable travel modes	Awareness of what alternatives people have to help them make the change (or sustain their use of) more sustainable travel modes	% answering yes/no	<i>Are you aware of the bus services you could use on your journey to work?</i>  Please give the number of the bus service you could use.  <i>Have you heard of Moving Somerset Forward (or other travel campaigns)?</i>  <b>+ MORE ABOUT</b> Further information about things you can monitor to ensure that you travel campaign messages are getting through are given in Chapter 6 of Making Campaigning for Smarter Choices Work, available via the Resource Centre for travel plans on <a href="http://www.movingsomersetforward.co.uk">www.movingsomersetforward.co.uk</a> .	Bar chart Table of bus services
 Management support	Management support	% answering yes/no	<i>Do your managers/organisation encourage or facilitate responsible car use?</i>	Pie chart
 Improvements in facilities or services	% people requesting improvements in certain travel aspects	Number of requests	<i>Which of the following encourages/ would encourage you not to travel to work by car/use alternative means of transport?</i>  <i>Can you suggest any other changes that would help you to avoid travelling by car, e.g. facilities, routes, services or equipment?</i>	
 Improvements in facilities or services			Please give the name of your employer.  <i>Where is your normal place of work?</i>  Which part of the organisation do you work in (job role/level in organisation and department)  N.B. Allows performance to be assessed according to grading and department, e.g. setting up departmental league tables.	

## OPTIONAL SURVEY INDICATORS

Using other questions in the survey - other things you could ask about in the survey are:

Locus for focus	Indicator	Unit of measurement	How to ask the question	Presenting the data
 Personal travel expenditure	Cost of journey to work each day	£	How much does your journey to work cost you each day (including fares and/or fuel including all running costs)	Bar chart
 Parking locations for work	Parking locations for all modes of transport	Parking locations	<i>If you cycle, motorcycle or travel to work by car, please state whereabouts you park when you get to work?</i>	
 Parking locations at home	Parking locations for all modes of transport	Parking locations	<i>If you cycle, motorcycle or travel to work by car, please state whereabouts you park when you are at home?</i>	
 Supporting travel plans	Number of people targeted by travel plan initiatives in other parts of their life (e.g. residential)	%	<i>Is the house where you live covered by a residential travel plan?</i>	Pie chart
 Business travel in the course of work	Proportion of journeys made at work each year by each mode of transport (by the longest part by distance of the journey undertaken)	% (modal share)	<i>What percentage of business travel do you do by car on your own?</i> <i>On average, how many miles a week do you travel on business while at work (using any mode of transport)?</i>	Pie charts

You could also ask provocative questions, such as:

### ENCOURAGE:

- Which of the following things do you think will NOT make a difference to how you travel to work/in the course of work?
- Which of the following encourage you to leave your car at home?
- What percentage reduction in cost of bus fares would make you choose the bus to get to work?

### ENFORCE:

- What would you do if your workplace parking was removed? (Park elsewhere, move jobs, try a different mode of travel)
- What do you do if you can't come into work by car?

### ENABLE:

- What travel improvements or changes would encourage you to leave your car at home more often (Please give specific locations, routes, services, facilities or equipment)?

### EXEMPLIFY:

- Do you feel your managers at work set an example?

### EXPECTATIONS:

- Do you want to reduce the amount you drive?
- If you have changed your travel habits recently, why is this (in a word)?



## MOVING FORWARD MOVING HOUSE: MONITORING TRIPS FROM NEW HOUSING DEVELOPMENTS

"Monitoring can ... be an important aspect of residential travel plans, where patterns of movement are reviewed against planned targets."

*(Manual for Streets, p38)*

Making Residential Travel Plans Work provides some useful additional ways to monitor travel plans for new housing developments:

- Number of trips emanating from the site by car per day, e.g. by use of Automatic Traffic Counters (ATCs)
- Use of alternative modes – walking and cycling counts, or surveys of public transport use for different purposes, or the use of travel diaries
- Frequency and extent of use of on-site facilities, e.g. local shop, cycle parking
- Levels of car ownership
- Mode of travel to work or school (though this may be influenced to a large extent by school and workplace travel plans at the other end of the journey)
- Membership and use of car clubs
- Feedback from personal travel planning exercises



**+ MORE ABOUT** Further advice about **personal travel planning** is given in the Educate section of the Menu of Measures, available as part of the Manual for Travel Plans via [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk).

"How we leave home can have a huge impact on the rest of our travel choices that day."

*(Essential Guide to Travel Planning, p12)*



### VISITOR TRAVEL

"If you receive large numbers of visitors - as hospitals or tourist attractions do - then you need a travel plan specially tuned to them based on data gathered via a visitor survey."

*(Essential Guide to Travel Planning, p17)*



**+ MORE ABOUT** Further, more specific information about **travel plans for major travel generators** (such as leisure and tourism sites, hospitals, and retail) is provided in the Resource Centre for travel plans on [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk). This gives advice about including customer, visitor, guest and patient travel within your travel plan. **+ Further advice and tips about managing visitor travel** are given in Sections 5.9-5.10 of the Travel Plan Resources Pack for Employers, available via the Resource Centre for travel plans on [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk).

## SETTING OUT THE QUESTIONNAIRE




The format of the survey should be:













- Logical to follow
- Clear, concise (not too long) and unambiguous
- Worded so as not to introduce bias or leading questions
- Devoid of multiple content questions, e.g. those that ask a number of questions in one question
- Not ordered or presented in such a way as to bias survey responses
- Clarified with tips, hints, examples and other instructions where necessary
- Able to generate easy-to-interpret responses, for example using tick-box question where answers are likely to be predictable or straightforward, e.g. Yes, No, Monday, Tuesday etc.
- Broken up with section headings, e.g. travel to work, travel in the course of work
- Easier to answer at the beginning with harder or more complicated or sensitive questions towards the end
- Sensitive to the needs of different people – e.g. lifestyles, commitments, language ability, level of education
- Representative of different parts of the organisation as a whole – different departments, groups, grades of staff, contract type (full/part time etc.)
- Easy to return – with details of who to return to, contact details and deadline for responses printed clearly on the questionnaire
- Appreciative of the time the respondent has spent on the survey
- Branded using the organisation's logo or travel plan logo if you have one (avoid pushy slogans positioning car use negatively on the questionnaire in order to avoid biasing the responses)



## DATA TO COLLECT IN OTHER WAYS

The following information could be collected by the travel plan coordinator outside of the survey.

Theme	Indicator	Source of data	Unit of measurement
	<b>+ MORE ABOUT</b> Further information about changes to <b>local cycling provision</b> is available by contacting Moving Forward using the contact details on <a href="http://www.movingsomersetforward.co.uk">www.movingsomersetforward.co.uk</a> .		
	Usage of local bus stops	Counts	Number of people alighting/departing from nearest bus stops at start/end of day
	Local transport fares	Bus companies	£ for local tickets
	Changes in local bus services	Bus companies/ Somerset County Council	Description of changes (positive/negative)
	Use of local public transport	Bus companies	Passenger numbers
	Take-up of on-site bus ticket selling	Relevant departments (facilities or finance)	Number of bus passes issued or sold on-site
	<b>+ MORE ABOUT</b> Further information about <b>contacting Transporting Somerset</b> to determine what public transport is available, Somerset County Council's opinion of the services, and the operational goals are for those services is given in the Resource Centre for travel plans on <a href="http://www.movingsomersetforward.co.uk">www.movingsomersetforward.co.uk</a> .		
	Individual registrations on car sharing register	<a href="http://www.carsharesomerset.com">www.carsharesomerset.com</a> local administrator (Somerset County Council – see website for contact details)	Number of staff registered in company
	Usage of on-site car parking	Counts or automatic data collection (e.g. swipe cards)	Number of cars parked in parking spaces (or number of empty spaces) mid-morning/mid-afternoon/lunchtimes/overnight (include different types of designated spaces, e.g. car sharing bays)
	Costs of motoring	Internet	£ (fuel prices, vehicle excise duties for different vehicle classes, local off-site parking charges)
	Costs of parking on-site	Relevant departments (facilities management, travel plan coordinator)	£ per day
	Availability of on-site and off-site parking	Internet (District Council websites)/counts	Number of car parking spaces on-site and in local area (in public car parks and on-street)
	Use of pool bikes or pool cars	Relevant departments (facilities)	% time bikes or cars are in use during working day, number of users, mileages per trip/year, fuel consumption
	Use of other pooled facilities	Relevant departments (facilities or travel plan coordinator)	Number of bookings/signing-outs per year
	Fuel consumption and efficiency of business vehicle fleet	Relevant departments (fleet management)	Miles per gallon/£ on business journeys; engine size and fuel/type mix of business vehicles

Theme	Indicator	Source of data	Unit of measurement
	Staff on-site at any one time	Counts	Number of staff on-site during middle of shifts through the week
	Take-up of travel competency training	Relevant departments (e.g. HR)	Proportion of staff attending travel plan training or induction sessions / requesting information on travel
	Deliveries to site	Counts or relevant departments (e.g. reception)	Number, time and size of deliveries on different days of the week
	Use of IT communication facilities	Relevant departments (facilities)	Number of sessions per day (e.g. videoconferencing)
	Reasons for business trips (meetings, site visits etc.)	Relevant departments (HR/finance)	Categorisation of trip purpose
	Patterns of business travel (locations, frequency of trips)	Relevant departments (HR/finance)	Locations and frequency of journeys
	Travel reimbursement expenditure	Relevant departments (finance/travel plan coordinator)	£ by mode of transport supported (including all travel-related expenses claimed, e.g. parking charges)
	Travel plan capital expenditure by department	Relevant departments (finance/travel plan coordinator)	£ by mode of transport supported (including ongoing parking costs)
	Where people live or come from to the site (i.e. origins)	Relevant departments (HR) or customer records databases	Maps of postcodes
	Progress of travel plan preparation and implementation of measures (i.e. process)	Travel plan coordinator	Date each element of travel plan action plan implemented
	<b>+ MORE ABOUT</b> Further information about <b>producing an Action Plan</b> as part of your travel plan is given under Using Targets in this guidance.		
	Number of events, promotions, campaigns per year	Travel plan coordinator	Numbers
	Number of travel-related information requests per year	Travel plan coordinator	Numbers
	Number of people participating in campaigns or answering surveys	Travel plan coordinator	Numbers

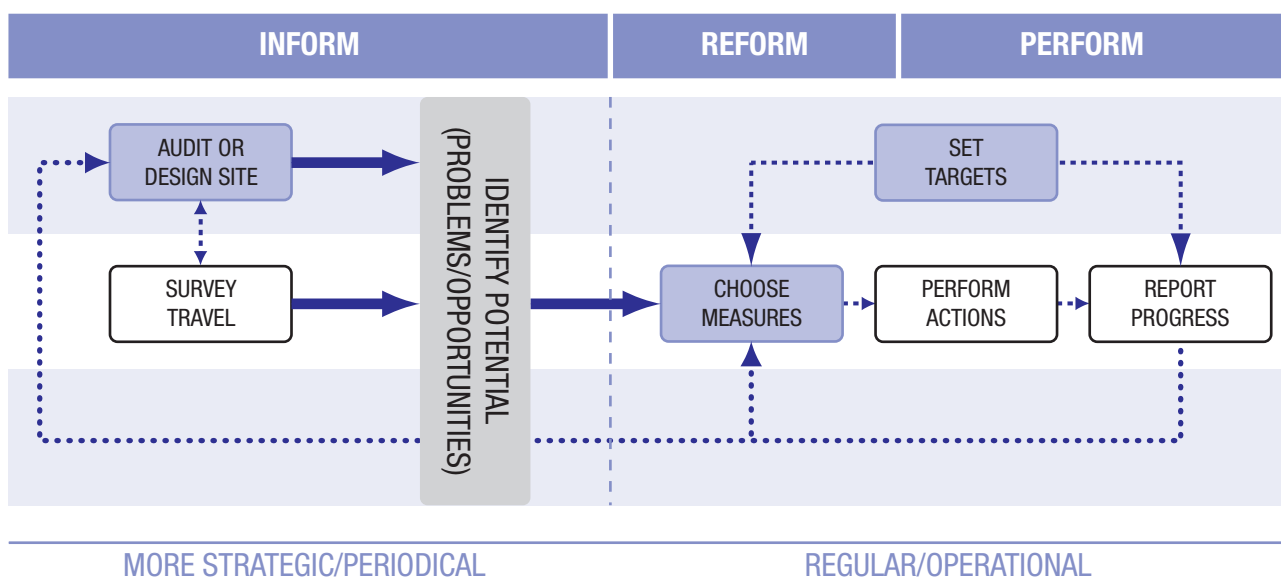
**+ MORE ABOUT** Further information about **introducing the measures** contained within this table is given in the Menu of Measures, available as part of the Manual for Travel Plans via [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk). **+ Further information about monitoring and reporting** specific aspects mentioned in the table above is given under How to Report Survey Results in this guidance.

# USING TARGETS

Somerset County Council will need to ascertain whether the proposed/required package of measures is likely to achieve the specified outcomes or targets when reviewing and approving a travel plan.

## TRAVEL PLAN CHANGE MANAGEMENT PROCESS:

The diagram below shows how the use of targets and monitoring fits into the travel plan management framework:



“This [travel plan] is a long-term management strategy for the community that seeks to deliver sustainable transport objectives through positive action. It will be articulated in a planning document and its contents will be implemented and subsequently regularly reviewed and revised.”

*(Design to Delivery, 2008)*

## TYPES OF TARGET

Two types of 'target' should be used as part of your travel plan:

**'ACTION TARGETS':** Specific actions to be completed – quantified in terms of numbers/amounts to be implemented and qualified in terms of their description/type. An example is the implementation of 12 Sheffield cycle stands by the end of November 2010.

### ACTION PLANS

**It is the implementation of the strategies contained within travel plans that contribute towards delivering outcomes, not simply the act of having a travel plan per se.**

It is therefore important to put together a travel plan action plan to establish when these actions will be implemented.

**This involves setting out a "time-frame for action at different stages of the travel plan process." (Using the Planning Process to Secure Travel Plans, p45)**

### TARGETS

Action plans (and aim targets) are an important way to monitor progress of the travel plan in fulfilling the intentions. It is important for actions to be:

- **QUANTIFIABLE:** The units the action or outcome will be measured in (i.e. the indicators to be used)
- **RELATED TO A TIMESCALE OR TRAJECTORY FOR DELIVERY:** The speed the action or outcome will be delivered at
- **REGULARLY MONITORED:** How data will be collected at intervals to ensure that progress towards implementing the action or outcome is on track
- **VERIFIABLE:** How the achievement of actions or outcomes will be checked or independently audited
- **REALISTIC** and appropriate

"It is important that as many measures as possible are in place prior to occupation to avoid car-based travel patterns becoming established. [...] ... research has shown that travel plans are most effective when measures are in place before employees move to the site, so that sustainable travel choices are easier to make from the outset..."

*(Using the Planning Process to Secure Travel Plans, p43-58)*

For each action in the travel plan, there needs to be information on the following:

**WHO & WHAT:** Responsibilities for implementing each element of the travel plan (developer/occupier/local authority/public transport operators)

**WHEN:** Timetable for implementation/activation of elements in the action plan and monitoring outcomes (i.e. target dates). For new sites, this may be relative to construction, occupation or with stages in the planning process

**FUNDING:** Who is funding the cost for implementation and providing ongoing incentives

**MEANS OF VERIFICATION:** e.g. through inspection or survey

**REMEDIAL ACTIONS AND TRIGGER POINTS:** Sensitivity of the travel plan aim targets in the event of the measures not proceeding or not being effective, and timeframes for deciding when to implement predetermined and appropriate remedial measures

*(Source: Using the Planning Process to Secure Travel Plans, p46)*

The action plan should also cover timeframes for the completion of subsidiary or daughter travel plans, if the initial travel plan was initially submitted or approved with only partial information being available.

**'AIM TARGETS':** Specific **outcomes** to be achieved (and measured) as a result of such actions being completed, measures in terms of modal split (proportion/% of journeys undertaken by single occupancy cars). An example is the achievement of only 20% staff arriving to work in single occupancy cars by the end of March 2012. These should be included alongside action targets in an action plan (above).

Targets and timescales for implementing actions should normally be set out for at least a five-year period following the occupation of a site or implementation of a travel plan. The travel plan should aim for targets to be at least “thereafter maintained” or improved upon once reached. Measures in the travel plan will need to continue to be promoted even after any monitoring period defined by the planning system, so that people do not fall back into their old ways and the rewards continue to be generated.

### CHOOSING THE RIGHT TYPE OF TARGET:

Of the two types of targets, aim targets are most important, as they demonstrate outcomes being delivered by the travel plan (its performance) – rather than just inputs (i.e. the amount of time or money being spent implementing measures).

### GETTING RESULTS:

The travel plan needs to demonstrate how the planned actions in the travel plan are expected to contribute towards achieving outcomes-based targets. Targets should be used to design and drive forward measures in the travel plan, including the physical design of the site.

**+ MORE ABOUT** Further advice about the **rewards** of a travel plan is given under the Rewards of Implementing a Travel Plan in this guidance.



### SETTING OUTCOMES TARGETS FOR NEW DEVELOPMENTS

In new developments where new travel patterns are being created, the travel plan should look to achieve healthy targets for modal split from the outset – rather than cutting car use incrementally only after occupants have moved in. It is important that unsustainable travel habits are not allowed to develop in the first place.

Because the focus of outcome indicators is on performance, more flexibility in the choice of measures in the travel plan is allowed – as long as outcomes are likely to be met.

Such frameworks are well-suited to situations where there is a low confidence in measures being effective, due to a lack of information about the detail of a site and its future occupiers (Source: Using the Planning Process to Secure Travel Plans, p50).

# TARGET SETTING

“Agreement of modal split or modal shift targets are often one of the most difficult areas of the travel plan negotiation in the planning process...”

*(Using the Planning Process to Secure Travel Plans, p48)*

By working backwards from 100% car driver trips and making reductions or adjustments, the following sources of information can be used to set or adjust targets:

## STARTING POINTS:

- A. Transport Assessments, which may provide a worst case estimation of trip rates and modal split (using calculations and case studies relating to other sites) – these are usually for sites without travel plans so targets should be set at more ambitious levels than the baselines from such databases
- B. Survey of existing occupants or local community
- C. Census data for local area for either daytime (for workplaces) or residents (for residential travel plans) travel to work

**+ MORE ABOUT** Links to **Census data** (including indicator UV37 for daytime population travel to work) from the Office for National Statistics are available via the Resource Centre for travel plans on [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk).

- D. Travel plan outcomes from similar local organisations (where available)
- E. Relative amounts of different parking being provided/proposed for all modes on-site\*

## REDUCTIONS FROM BASELINE:

- F. Number of staff who live within walking distance to work (up to two miles)
- G. Number of staff that live within cycling distance to work (usually up to five miles – though may be longer)
- H. Number of staff within employer’s workforce or employment catchment area that live near appropriate bus or train routes (i.e. 45 minutes travel time with a service every 30 minutes with up to 800m walking each end, or 1km for trains)
- I. Where business activity is located close to major bus/rail stations/stops
- J. Number of staff that live in a car sharing dense area or route, or who are actively participating in the [www.carsharesomerset.com](http://www.carsharesomerset.com) journey matching service
- K. Where the travel plan is near to existing businesses with travel plans or part of a site wide travel planning approach
- L. Where travel in the course of work is not a major aspect of business operations

## OTHER MITIGATING FACTORS:

- M. Housing market and need – where people live in relation to where they work (e.g. from Census data)
- N. Areas of high air or noise pollution or congestion where travel plans will need to achieve a high level of use of sustainable modes
- O. LTP targets for modal shift

**+ MORE ABOUT** Further information about Somerset’s **Local Transport Plan** for 2006-2011 is available via the Resource Centre for travel plans on [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk).

- P. Countywide parking standards (all wheeled modes)\*

\* Levels of parking availability can be used to determine what the maximum allowance for any mode might be if all parking is accommodated on-site. For example, if among 50 staff, 15 cycle parking spaces are being proposed, it might be reasonable to assume the maximum proportion of people cycling to be around 30% (100% divided by 50 staff, times 15 cycle spaces).

“...the emphasis on the target requires that its calculation must be based on sound data and reasonable assumptions [...] the setting of modal split or modal shift targets must be transparent, realistic and justified.”

*(Using the Planning Process to Secure Travel Plans, p50 and p48)*





## USING OTHER TARGETS

For inaccessible sites, it may be more appropriate to focus on monitoring awareness of the travel alternatives, occasional use of other transport modes, or minimising distances travelled by car. In some circumstances, a sole focus on modal shift from journeys by car may not be an appropriate indicator of progress. You could also consider setting internal targets for different groups of people – directors, staff, departments, visitors, different transport users (e.g. cyclists, bus users) – or categories of travel, e.g. commuting, business trips, long-distance trips etc.



## BUSINESS TRAVEL

Business travel should form a particular area of focus in the travel plan. Corporate policies may be able to alter work travel patterns more readily than they can commuting habits. Cost savings from business travel also occur above the organisation's bottom line – costs for day-to-day commuting largely fall to the individual (except where free car parking is provided by the employer, or incentives are provided as part of the travel plan).

**+ MORE ABOUT** Further advice and tips about **managing business** travel are provided under Smarter Working in the Encourage section of the Menu of Measures, available as part of the Manual for Travel Plans, and Sections 5.9-5.10 of the Travel Plan Resources Pack for Employers, available via the Resource Centre for travel plans on [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk).

**The use of the car has become de rigueur for many business journeys.**

Alternative modes of travel are rarely considered or promoted as part of corporate policies, or set out in a clear hierarchy of travel options. Targets should therefore be set for reducing the proportion of business travel by car (Source: Essential Guide to Travel Planning, p20). This may be best monitored by the proportion of expenditure on each mode, or alternatively the number of journeys from expense claims (where reimbursed) or a travel survey. The way you collect this data will depend on how much of this information you already collect for other monitoring purposes.

“Business travel should be an integral part of a travel plan. Arrangements for business travel can fundamentally affect how people”

*(Essential Guide to Travel Planning, p49)*



## TRAVEL MONEY: REDUCING TRAVEL COSTS

A standard employment travel plan is likely to have running costs of around £47 per year for each employee (Source: Making Travel Plans Work, p2). It is worth remembering that, with a well-designed travel plan, what goes in (as expenditure) will come out in terms of rewards (Source: Essential Guide to Travel Planning, p12). Personal travel planning in new housing developments may cost around £25-50 per unit (Source: Encouraging Sustainable Commuting, p27).

A bus which runs in the mornings, evenings and at lunchtime might cost around £350/day to run (Source: Essential Guide to Travel Planning, p39). Employer-run bus services can work well where a group of employers club together, e.g. in a business park. Employers can offer different levels of subsidy to their own staff, dependent on their own situation and travel plan requirements.

### INITIAL EXPENDITURE:

If you consider the relative costs of putting in alternatives, the case for alternative modes of transport will stack up and prove to be better value. A typical Sheffield cycle parking stand can cost around £50, plus £100-150 fitting. The costs of providing motorcycle parking are similar (Source: Guidelines for Motorcycling, p43).

"...travel plans often involve only limited capital expenditure, on items such as new cycle shelters, footpaths, bus stops or car park barriers."

*(Essential Guide to Travel Planning, p6)*

Parking can be a substantial cost. Construction and groundworks for surface parking are likely to be between £1000-3000 per space; multi-storey and underground parking will rise to £5000-10000+ per space. CCTV can also be costly to install.

"Management of car parking is a vital part of a travel plan. If you provide plentiful free car parking there will be a built-in incentive to drive to work, and indeed each driver will be receiving a subsidy from the company running to hundreds or even thousands of pounds per year."

*(Essential Guide to Travel Planning, p56)*

### REDUCING THE COSTS OF PARKING:

"Often the substantial maintenance costs of car parking are buried in a facilities manager's budget."

*(Essential Guide to Travel Planning, p17)*

You may be able to cut the following costs by reducing the amount of parking you have on site:

- £400 per parking space annually
- <£2000 per space per year if renting
- Upkeep and general maintenance of street furniture (signs, seating, litter bins), planters, trees and landscaping, drainage, fencing, lighting, CCTV, access barriers, kerbs, surfacing and pavements
- Security and staffing
- Bills including power/energy, insurance costs and business rates

(Source: Essential Guide to Travel Planning, p18)

**CONTINUING EXPENDITURE:**

"High achieving travel plans usually have an identifiable travel coordinator, with a hands-on role in pushing forward initiatives and ensuring that they run effectively... travel arrangements will still need to be promoted, managed and reviewed on an ongoing basis."

*(Making Travel Plans Work, p39)*

Funding requirements for a travel plan often include:

- The coordinator/planner post
- Travel surveys and costs associated with audits, analysis and monitoring
- Personal travel planning services
- Websites
- Publicity, marketing and information (printing, production, distribution etc.)
- Building installation of physical features which form part of the plan
- Consultancy fees
- Staff time for those supporting and feeding into the travel plan

(Source: Travel Plan Resources Pack for Employers, Section 8.4)

"Your travel plan coordinator will require a budget to cover items such as travel surveys, publicity materials and activities, installation of cycling facilities, or subsidised travel passes. ... Organisations actively implementing travel plans have been found to spend an average of £50 per employee per year..."

*(Essential Guide to Travel Planning, p12)*

# REPORTING

## HOW TO REPORT THE SURVEY RESULTS

Data needs to be collected and reported to confirm the achievement of targets and outcomes, and direct the future direction of the travel plan.

You should report your indicator data annually to Somerset County Council's travel plan coordinator, so that they are able to track overall progress of your travel plan alongside others in the area – and assist you in meeting any targets with any wider local transport projects if necessary.

### PRESENTING THE DATA

The Moving Forward website contains spreadsheets which data can be loaded into to produce graphs summarising the results of the survey.

#### THE MOVING FORWARD TRAVEL PLAN DASHBOARD:



##### HOME LOCATIONS:

For large organisations, (anonymous) staff home postcodes can be mapped using Geographical Information Systems (GIS). For smaller organisations or simpler sites, home locations can simply be plotted manually on a base map.



**MORE ABOUT** A **postcode map of Somerset** is available via the Resource Centre for travel plans on [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk).



##### MODAL SPLIT:

Percentage modal split data should be reported (i.e. the proportion of people using different modes of transport). As percentages, these are not sensitive to changes in the size of the workforce, e.g. you will not be penalised if you take on more staff, as long as the proportion of drivers in this expanded workforce is the same or lower than the existing group of staff. Raw figures (numbers) should also be presented.

Expressing travel data in terms of how commonly the modes are used is also a good way to communicate data and create a sense of community effort. For example, 20% of people cycling to work and one third using public transport could be phrased as 1 in 5 people cycling to work and 1 in 3 people using public transport.



### WHAT IS CAR SHARING?

Car sharing is defined as accompanying someone who is making the same journey or continuing on to another destination. Journeys where a driver or a passenger acts as an escort or 'taxi driver' are not counted as car sharing. For the purposes of monitoring car sharing, it is not important to know whether the individual is a driver or a passenger.

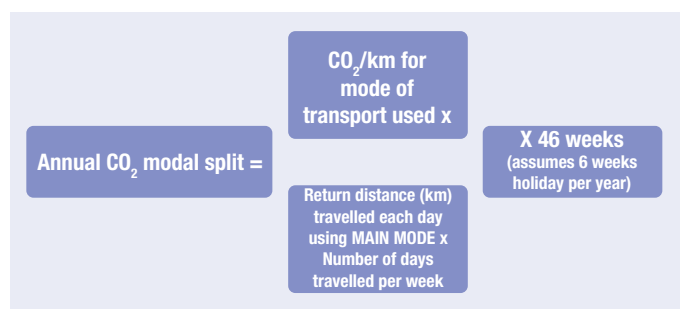
(Source: Making Travel Plans Work, p43)



### CO<sub>2</sub> EMISSIONS:

The language of carbon dioxide (CO<sub>2</sub>) emissions is new to many businesses, but has increasing importance. However, CO<sub>2</sub> emissions can be estimated easily using data already collected in travel plan surveys (possibly with the additional question of car engine size).

The calculation for CO<sub>2</sub> modal split is as follows:



1. Establish the CO<sub>2</sub> emitted per km for each mode of travel used.

**+ MORE ABOUT** A CO<sub>2</sub> calculator is built into the **spreadsheet** which you can download from the Resource Centre for travel plans on [www.moving Somerset forward.co.uk](http://www.moving Somerset forward.co.uk).

2. For each person, enter the total distance (km) travelled to and from work by their main mode of travel. If there are a number of work sites or home places for each person, estimate the average distance travelled to and from work each day
3. Next to the distance, enter the number of days per week this journey is carried out
4. Multiply the emissions per km by the return distance and then by the number of days per week travelled then by 46 (assuming that the average worker is off work for six weeks per year, including annual leave, occasional days and sick leave)

### Your carbon - your choices

TABLE OF INDICATIVE CO<sub>2</sub> EMISSIONS FOR DIFFERENT MODES OF TRAVEL:

Mode of travel	CO <sub>2</sub> per km (grams per passenger per km) Source (unless *): Carbon Pathways Analysis	Distance (kms) travelled by this mode for same CO <sub>2</sub> footprint as <b>1km</b> by car
Bus	69	1.9
Car (one person)	130	1
Car sharing	65	2
Cycling	0	Infinite
Motorcycle 125cc or less*	48.5	1.4
Motorcycle more than 125cc*	113.6	1.1
Park & Ride*	99.5	1.3
Train	60	2.2
Walking	0	Infinite
Work at home	0	Dependent on household carbon costs
Working off-site without calling at regular place of work	-	Dependent on mode of transport and distance travelled

\* Estimate

## ASSESSING RESPONSES

### RESPONSE RATE:

This is the number of survey responses received, divided by the sample size (the number of questionnaires sent out), given as a percentage. E.g. 60 forms received from a total of 100 sent out = 60 divided by 100 is 0.60 (or 60%). The sample size is the size of the workforce provided the survey was sent around to everyone.

### CODING DATA:

**+ MORE ABOUT** Further information on **coding qualitative data** – people's comments and suggestions – and links to further advice about doing surveys are available from the Resource Centre for travel plans on [www.movingsomersetforward.co.uk](http://www.movingsomersetforward.co.uk).

“When using the results from your travel survey, it is essential that you relate responses back to the site assessment ... if people say that [the bus is too infrequent] ... is it that they are just not aware that there is actually a 20-minute service...”

*(Travel Plan Resources Pack for Employers, Appendix 3.H)*





## ABBREVIATIONS

ATC – Automatic Traffic Counter

ATOC – Association of Train Operating Companies

CABE - Commission for Architecture and the Built Environment

CNG – Compressed Natural Gas

CO<sub>2</sub> – Carbon Dioxide

CSR – Corporate Social Responsibility

D&AS – Design & Access Statement

DPA – Data Protection Act

EMAS – Environmental Management and Auditing System

EPOMM – European Platform on Mobility Management

EMAS – Eco-Management and Audit Scheme

FQP – Freight Quality Partnership

GFA – Gross Floor Area

GIS – Geographical Information System

GPS – Global Positioning System

IHIE - Institute of Highway Incorporated Engineers

IT – Information Technology

LDF – Local Development Framework

LPG – Liquid Petroleum Gas

LTP – Local Transport Plan

PDA – Personal Digital Assistant

SCC - Somerset County Council

SUDS – Sustainable Urban Drainage System

SOV – Single Occupancy Vehicle

TA – Transport Assessment

TP – Travel Plan

VoIP - Voice over Internet Protocol

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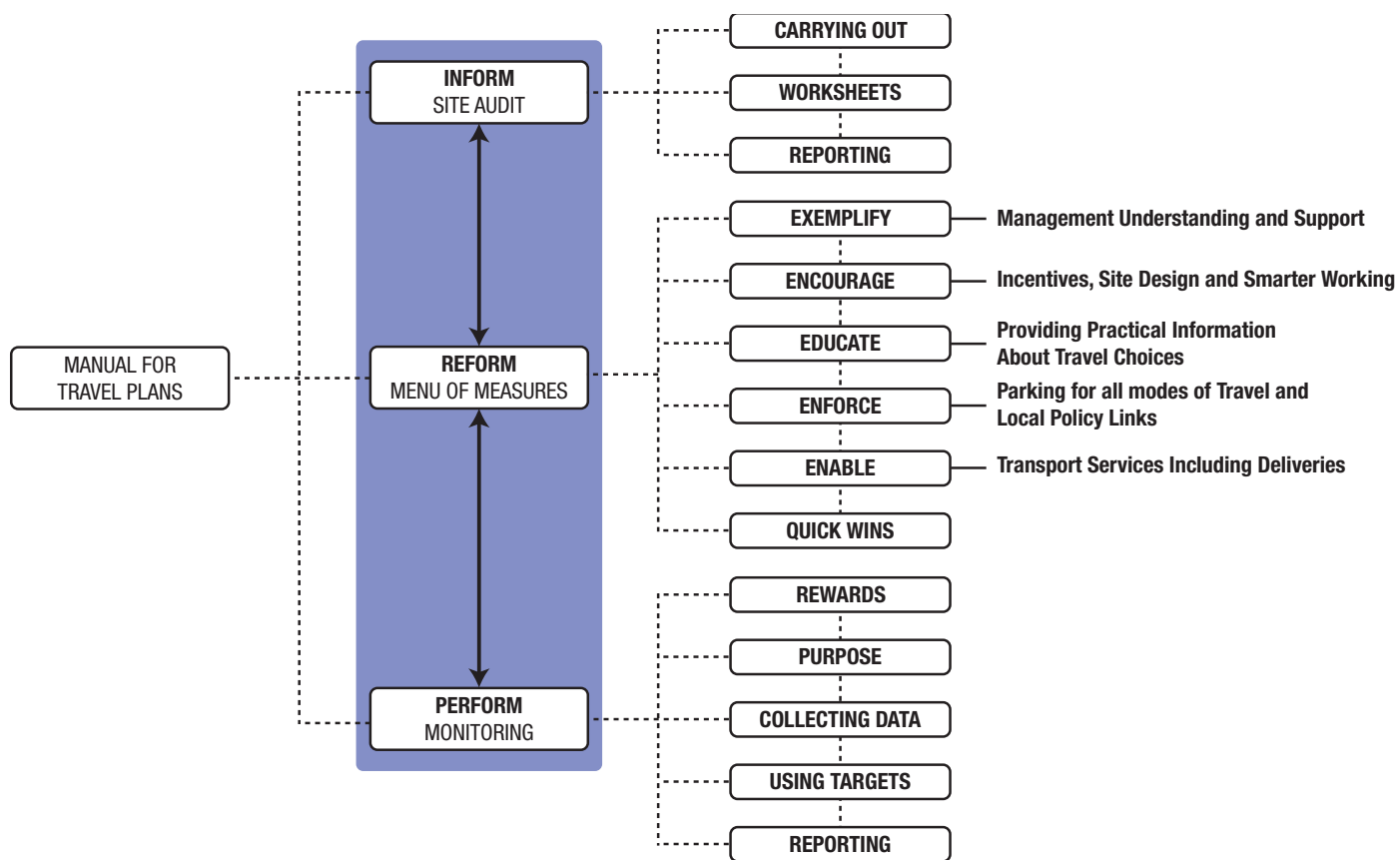
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**MANUAL FOR TRAVEL PLANS** is part of a business and developer support package to help manage travel to, from, and within your site.

**INFORM:** SITE AUDIT AND DESIGN GUIDELINES

**REFORM:** MENU OF MEASURES

**PERFORM:** MONITORING GUIDANCE

[WWW.MOVINGSOMERSETFORWARD.CO.UK](http://WWW.MOVINGSOMERSETFORWARD.CO.UK)

## ARE YOU WITH US?

Through Moving Forward, Somerset County Council can support you. For more information about smarter travel management and help with travel plans, please get in touch:

Workplace Travel Plan Coordinator  
Moving Forward Smarter Choices Team  
Somerset County Council  
County Hall  
Taunton  
TA1 4DY  
[movingforward@somerset.gov.uk](mailto:movingforward@somerset.gov.uk)  
0845 345 9155

Further copies of this and other documents from Manual for Travel Plans are available from [www.movingforward.co.uk](http://www.movingforward.co.uk) (> Business).

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