Coordinator's Guide

Greater Wellington's

TRAVEL PLAN PROGRAMME



Choosing sustainable transport

October 2008



Introduction

This guide is written for travel plan coordinators that are developing a travel plan for their own organisation as part of Greater Wellington's Travel Plan Programme. While every workplace is different, this guide focuses on a basic process for developing a workplace travel plan. It aims to make the travel planning process straightforward and cost effective while ensuring a quality travel plan for your organisation.

Greater Wellington Regional Council gratefully acknowledges the help of the Energy Efficiency and Conservation Authority (EECA) in the preparation of this Coordinator's Guide and the Auckland Regional Transport Authority (ARTA) for their assistance with the development of Greater Wellington's Travel Plan Programme processes and guidelines.

Greater Wellington provides the following to participating travel plan workplaces:

- Templates and guides for all steps in the travel planning process
- Advice and guidance through all the travel plan steps
- Online staff travel surveys for researching how staff currently travel and later evaluating how staff travel patterns have changed
- General survey analysis including a map of where staff live and how they travel to work

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Chapter One: Introduction to travel plans

1. Introduction to travel plans

A workplace travel plan is a range of measures that promote sustainable modes of transport for the journey to and from work and also during the course of the working day. A workplace travel plan includes analysis of the way staff travel to and from work, site and policy audits and promotion of active modes of travel.

The five phases in a workplace travel plan are outlined below. Each phase is completed when the organisation submits key documents and key milestones are achieved.

1.1 Travel Plan Phases

1.1.1 Set up

The purpose of the set up phase is to gain management commitment and appoint a travel plan coordinator. In this phase the objectives and scope of the travel plan are decided and how the travel plan will be researched.

1.1.2 Research

This phase involves researching how staff currently travel and the transport issues for your site. It includes a staff travel survey of all staff and a site and policy audit.

1.1.3 Planning

In this phase, the organisation decides which actions will be taken and how and when they will be implemented. The travel plan is then approved by senior management.

1.1.4 Implementation and Completion

This is when the actions in the travel plan are implemented. At the end of this phase a final progress report and lessons learned report are completed to better assist organisations to meet travel plan targets and provide best practice examples.

1.1.5 Continuous Improvement Cycle

This phase involves monitoring and improving the plan, including an evaluation survey on how staff travel patterns have changed as a result of implementation of your travel plan. A flowchart of the phases in developing a travel plan is shown below.

SET UP RESEARCH **PLANNING** CONTINUOUS **IMPLEMENTATION IMPROVEMENT AND COMPLETION** Undertake travel Gain management surveys, site and Decide what **CYCLE** Implement Travel commitment policy audits, and actions will be Undertake annual Appoint travel consultation to taken and how plan. and when they will plan coordinator understand how staff evaluation travel Set objectives and currently travel and be implemented. surveys. scope of the plan. issues preventing Write and adopt Review plan and sustainable travel plan. identify new transport. issues.

2. What is involved in each travel plan phase?

This table shows what is involved in each travel plan phase. It also shows what needs to be submitted to Greater Wellington, who is responsible for completing each task and what template and guides Greater Wellington provides.

Phase	Purpose	What needs to be done (items in bold text are required to be submitted to Greater Wellington)	Greater Wellington provides	Who is responsible
Set up	Gain management commitment and appoint a travel plan coordinator	Project Charter outlines the framework of the project. Research Plan (including communications plan) details how the research phase will be delivered. Communications plan outlines how the plan will be promoted.	Template Template, Communications Guide	Coordinator Coordinator
		Partnership Agreement is an agreement between your organisation and GW to meet the outlined responsibilities and follow the travel plan project methodology.	Template	Chief Executive
		Confidentiality Agreement This ensures the protection of confidential information collected in the travel plan process.	Template	Chief Executive
Research	Understand how staff currently travel and the transport issues for your	All Staff travel survey is an online survey of how staff currently travel Site and Policy Audit is about the facilities on your site and policies of your organisation.	Survey and guide Site and Policy Audit template	Coordinator Coordinator
	site.	Travel Report: a summary of the results of the staff travel survey, policy reviews and site and policy audit.	Basic analysis, map Template	Coordinator
Planning	Decide which actions will be taken and how and when they will be implemented.	Travel Plan outlines background, aims, objectives, targets and actions written and adopted.	Template	Coordinator
Implementation and Completion	Implement travel plan.	Final Progress Report outlines the status and achievements of the project and lists any outstanding issues. This report provides case study examples of best practice. Lessons Learned Report details lessons learned throughout the project. This and the	Template Template	Coordinator Coordinator
		progress report provide information to allow Greater Wellington to better assist organisations in meeting travel plan targets	, omplete	
Continuous Improvement Cycle	Evaluate and improve travel plan.	Annual Evaluation survey details how staff travel patterns have changed as a result of the implementation of the travel plan.	Survey/basic analysis	Coordinator

3. Benefits of a workplace travel plan

There are a number of ways a workplace travel plan can benefit your workplace. For example:

Solve parking and land problems –

A travel plan could reduce pressure for car parking space allowing that land to be used for other purposes. It may be that you are relocating and won't have as many parks available or you would like to reduce the cost of renting or maintaining your car parks.

Provide real cost savings to your company

Many companies do not know how much money they spend annually on travel-related expenditure such as fleet fuel costs, company cars, other workplace-related travel, and car park expenses. By analysing your travel patterns, it may be possible to identify areas where your workplace can save money.

Improve your company's image

Being perceived as being environmentally friendly will improve your company's image and make it more attractive to customers and shareholders. It will also make it more attractive to present and future employees as a good place to work.

Increase opportunities for accessing your workplace

You may be able to draw from a wider pool of labour if your workplace is more easily accessible by means other than by car.

Promote a healthier and more motivated workforce

Studies show people who walk or cycle to work are more alert and less stressed when they arrive than their colleagues who drive. Physically active people often take less sick days and this can help increase your company's productivity.

4. Successful workplace travel plans

Experience to date has found seven key factors to be present in successful travel plans.

Ownership

The travel plan must be 'owned' by the workplace. In other words, it needs to be seen to be developed by the people in the workplace for the benefit of staff and the workplace generally.

Benefit for the workplace

Successful workplace travel plans have generally been where the workplace has pressing issues that need to be addressed (e.g. parking, relocation). The travel plan becomes a way of resolving these issues and ensuring good solutions are implemented.

Tailored to the workplace's needs

The travel plan must be tailored to the particular workplace rather than attempt to impose a standard response.

Champion

A 'champion' is needed within the workplace to provide the internal impetus and 'push' to complete the travel planning process. The champion is usually a senior manager committed to the project.

Coordinator

The workplace travel plan coordinator provides the glue to drive the cohesive development and implementation of the travel plan. This person provides an essential link between the workplace and external stakeholders such as Greater Wellington.

Outcome-based approach using a specific model

A workplace travel plan should focus on achieving outcomes. Different workplaces will action different parts of the process in different ways. As long as the key tasks are achieved, this process will generate a solution owned by the workplace.

Positive relationships and commitment of key stakeholders.

There needs to be a positive relationship between stakeholders (staff, managers, council representatives) and the travel plan coordinator. Frequent, clear communication is essential.

5. Travel Plan Coordinator

What is the Travel Plan Coordinator's role?

The role of the travel plan coordinator may vary. Your workplace may decide that the role is one of coordination, ensuring that the tasks in the travel plan development are undertaken whilst not actually doing them yourself. For instance, there could be different individuals leading focus groups, completing site and facility audits etc., all reporting to you.

Or you may undertake the most of the work yourself. Some larger organisations and/or those with multiple office locations may choose to contract project management support for the set up and research phases. Travel plan programme staff at Greater Wellington can assist in recommending appropriate resources.

What are the responsibilities of the Travel Plan Coordinator?

Your responsibilities as travel plan coordinator may include:

- Presenting a business case to secure a budget for travel plan development and ensuring its efficient and effective use.
- Obtaining and maintaining commitment and support from senior managers, staff, union representatives etc.

- Designing and implementing effective marketing and awareness campaigns to promote your travel plan
- Setting up, coordinating, and attending working groups etc.
- Coordinating and promoting the staff survey and staff consultation required to research your travel plan
- Acting as a point of contact for all staff requiring information
- Liaising with different departments, e.g. human resources, facilities etc., and external organisations, e.g. local authorities, transport operators etc.
- Overseeing the development and implementation of the travel plan
- Coordinating and promoting the evaluation survey and monitoring programme for your travel plan.

Qualities of the travel plan coordinator

You will need to demonstrate enthusiasm, negotiating skills, and an ability to communicate effectively with people at all levels. Other qualities that might be appropriate include:

- Popularity amongst the staff and commanding respect you will be trying to persuade them to change the habits of a lifetime
- Capability of dealing with all types of people within your workplace and external organisations
- Practical and realistic, with a balanced perspective
- Project management skills and the ability to analyse data and prepare reports.
- Organised in your thinking, and capable of multi-tasking, and
- A believer in the cause of sustainability, with a knowledge of environmental and workplace issues.

The time required for the travel plan coordinator role will vary. Some large businesses have appointed a full time coordinator, whilst smaller workplaces have selected a coordinator from their existing workforce, who works on the travel plan in addition to their 'normal' work.

The travel plan coordinator should report directly to a managing director or a chief executive as this will send out messages about the importance of your travel plan to the rest of the staff. This person should also be fully committed to the travel plan as they may need to champion it in board meetings and to others.

6. Working party

What does the working party do?

The role of the working party is to:

- Represent the different views within your workplace
- Make recommendations to senior management on what actions should be part of the final travel plan
- Communicate to staff on the progress of the travel plan
- Lead by example

Who should be part of the working party?

Your working party should include:

- A senior manager
- An enthusiastic member of staff from each division or building if your organisation is large
- Representatives from parts the organisation that have a special interest in the travel plan. For example, human resources, facilities management, finance, IT and communications staff.

The working party should not be too large. Some people can be invited along as necessary. You could also invite local authority representatives, union representatives and public transport representatives when relevant.

How much time is needed from each member?

The amount of time needed for the working party will vary and will depend on the findings for each workplace. As a guide, one or two meetings may be required during the setup phase, two to four meetings during the research and planning phases, with quarterly or six-monthly meetings during the implementation phase.

More time may be needed if the actions in the travel plan involve working party members in their day to day roles. For example, changes to human resource policy or the installation of video conferencing equipment.

7. Travel plan project costs

Travel plan development costs

Costs during the development of the travel plan include:

- Travel Plan coordinator's time
- Working party time

- Staff time to fill out survey (5-10 minutes each)
- Promotion and prizes for the staff survey
- Analysis of survey results if not done by the Travel Plan Coordinator
- Communications
- Any consultancy support

Ongoing time and resource requirements

There will be resource requirements during the implementation phase. These are of course dependent on the size of the workplace and the scope of the travel plan and will be detailed during the planning phase.

While the demands on staff time should decrease once the travel plan has been developed, an ongoing staff resource of anything from 0.1 to 1 full-time equivalent (FTE) is likely to be required for the coordinator role and project work during implementation.

Chapter Two: Set-up Phase

1. Overview of set-up phase

To gain management commitment and appoint a travel plan coordinator

Objectives

- Gain management commitment and appoint a travel plan coordinator.
- Sign Partnership Agreement with Greater Wellington for both parties to meet outlined responsibilities and follow the travel plan project methodology.
- Sign Confidentiality Agreement with Greater Wellington to ensure the protection of confidential information collected in the travel plan process.
- Identify relevant stakeholders and working party and clarify their roles and responsibilities
- Develop a Project Charter outlining why your organisation is developing a travel plan and what areas it will cover.
- Develop a Research Plan, outlining what the research phase will involve
- Develop a Communications Plan for the project.

Steps

- 1. Develop and present a case for undertaking a travel plan, showing the benefits
- 2. Gain management commitment to participate in the travel plan.
- 3. Ask management to sign Partnership Agreement and Confidentiality Agreement.
- 4. Identify stakeholders and possible working group members and their roles.
- 5. Develop the Project Charter. Define the scope of the travel plan (e.g. staff commuting, travel during the work day, visitor travel). Determine overall aim(s) for the travel plan.
- 6. Develop the research plan. Talk with Greater Wellington staff about any survey customisation requests.
- 7. Prepare a communications plan for the workplace travel plan.
- 8. Submit Project Charter, Research Plan and signed Partnership Agreement and Confidentiality Agreement to Greater Wellington.

9. Greater Wellington reviews the Project Charter and Research Plan within five working days.

Important themes

- Engaging stakeholders in a collaborative process
- Managing the expectations of participants to ensure they are realistic

Greater Wellington provides:

- Project Charter template
- Research Plan template
- Communications Plan guide
- Partnership Agreement template
- Confidentiality Agreement template
- Example of staff travel survey

Completion of set-up phase

The set-up phase is complete when the Partnership Agreement and Confidentiality Agreement have been signed and the Project Charter and Research Plan have been approved by Greater Wellington.

2. What the set up phase involves

Develop a business case for the travel plan and gain management commitment

Management needs to be convinced that the benefits of undertaking a travel plan outweigh the costs. This may require the development of a workplace business case and/or presentation, for example specifying:

- expected benefits quantified where possible
- resource requirements staff time and direct costs
- scope of the travel plan, and
- timeline and tasks.

Identify stakeholders and working group members

For a workplace travel plan, staff as a whole and management are key stakeholders. Greater Wellington, the local council and transport providers may be involved in your travel plan as external stakeholders. Greater Wellington Travel Plan Programme staff are available to attend some working party meetings, such as the first working party meeting and the meeting to review the draft travel plan. Depending on your workplace there may be additional stakeholders, for example the property owner/manager and neighbours or other building occupiers.

The working group should comprise representatives of relevant staff departments and external stakeholders. The specific roles of the travel plan coordinator and champion should be filled. The travel plan champion should be someone in management who can make things happen in the workplace as required and lobby for the travel plan within the management team.

Note that the whole working group will not be required for every meeting. In effect there is likely to be a core group of members who drive the development of the travel plan and meet more regularly than the expanded or full group.

Develop the Project Charter (Greater Wellington provides template)

Consulting with your management team and colleagues may have given you a sense of how wide ranging the scope of your travel plan should be. How far you choose to take the plan will depend largely on the specific transport issues and needs in your work environment, resources and time available to take action, and the level of participation from staff and management. Accordingly, your travel plan may focus on some or all of the following areas:

- travel to and from work
- travel within the working day (e.g. meetings, intra-office travel, personal trips)
- visitor travel
- couriers, deliveries, freight
- air travel by staff and consultants
- the vehicle fleet
- vehicle and human resource policies, e.g. company cars, carparking, working from home

Your workplace may decide to focus on one of these areas first, with a later stage of the travel plan expanding to other areas. In large workplaces, there may only be opportunities to implement travel plan actions within a limited number of departments or sites.

Establish overall aims

At this stage you should be able to establish overall aim(s) for your travel plan. For example:

- Reduce the number of car journeys used by staff for travel to and from work and within working hours.
- Increase the number of walking, cycling and public transport journeys used by staff for travel to and from work and within working hours.
- Increase the fuel efficiency and environmental sustainability of the vehicle fleet.
- Reduce work-related air travel by staff and consultants.
- Reduce the number of peak hour commuter trips by single occupant vehicle.

It is important to note here that preconceived views on the content of the travel plan should not be developed at this point, but should be informed by analysis of the data collected during the travel plan process. However, defining aims at this point, even if they change significantly later, will help to establish the scope of the travel plan and assist with communicating why your workplace is developing a travel plan.

Develop the Research Plan (Greater Wellington provides template)

The research phase provides the information you need on how staff travel and what transport issues exist in your organisation for you to determine the best actions to implement in your travel plan. It is important that the research phase is carefully planned so that the necessary information is collected.

Greater Wellington provides an online staff survey that asks staff how they currently travel to work and what would encourage them to consider walking, cycling, carpooling or catching public transport. From the survey results, Greater Wellington will analyse the data to build a picture of regional travel patterns. Greater Wellington will also provide a map of where staff live and how they travel to work.

In addition, a template for a site and policy audit is provided by Greater Wellington. This covers what facilities your site has, current vehicle and human resource policies and the transport routes to your site. This needs to be completed for each worksite in the Wellington region.

We recommend you carry out more in depth consultation with staff about what they perceive are the benefits of the way they currently travel to work and what they perceive are the barriers to trying an alternate option. This can be done in focus groups, through informal discussions with staff, by talking at staff meetings etc.

Prepare a Communications Plan (Greater Wellington provides guide)

Successful communication is a key factor in the success of a travel plan. The quality of your Travel Plan depends on what percentage of staff complete the

travel survey and participate in the consultation. Communications can play an important role in engaging staff in the planning process.

Your communication plan can remain confidential to your organisation so it is not a requirement to submit this plan to Greater Wellington. As it is strongly recommended that you prepare a communications plan, Greater Wellington provides a guide to assist you in writing a communications plan. You may need to follow the communication guidelines within your organisation.

Chapter Three: Research Phase

1. Overview of Research Phase

Understand how staff currently travel and the transport issues for your site

Objectives

- Gather data required for the travel plan
- Analyse the data from the Travel Survey
- Recommend actions to senior management for approval in principal

Steps

- 1. Carry out a site and policy audit for each worksite
- 2. Conduct online Travel Survey
- 3. Conduct focus groups or other form of consultation
- 4. Compile and analyse the data
- 5. Prepare a brief Travel Report summarising current travel patterns
- 6. Submit travel report to Greater Wellington (optional)

Important themes

- Gaining and developing the active participation of the whole workplace
- Selecting data collection and communication methods appropriate to your workplace

Greater Wellington provides

- Online staff Travel Survey
- Site and policy audit form
- Travel Report template

Completion of the Research Phase

The Research Phase is complete when data from audits, focus groups and surveys has been collected, analysed and summarised.

2. What the Research Phase involves

Carry out site and policy audit (Greater Wellington provides audit form)

The first recommended data collection task is to gain a clear understanding of the transport options and facilities available on-site and your workplace's human resource and vehicle policies. Greater Wellington provides the audit form that simply needs to be filled out.

Conduct online Travel Survey

The Travel Survey is a key part of the travel plan process. It is important that as many staff as possible complete the survey, the higher your response rate, the better quality information you have to build your travel plan. Greater Wellington provides the online survey which focuses on how staff travel to and from work and what would encourage them to consider alternate travel options.

The timing of the survey is important to maximise the response rate (e.g. avoid peak holiday periods and company deadlines such as the end of financial year) and to ensure travel patterns are as 'normal' as possible (e.g. winter is likely to mean less walking and cycling). Some coordinators suggest launching the survey on a Friday is a good time to get a higher response rate. The highest number of responses is generally on the first day. Prizes also play an important role in encouraging staff to participate, as well as endorsement from senior management.

It is important that prizes do not relate to transport as this may distort the results of the survey. For example, offering free train tickets is more likely to appeal to people who already catch the train, meaning a higher percentage of train commuters may answer the survey compared to other groups.

Focus groups and staff consultation

Focus groups can be an effective way of gaining a more in-depth understanding of why staff make the travel decisions they do. We recommend focus groups of 6-8 people and that staff who use similar transport modes are in the same group, eg. car drivers, cyclists and walkers, public transport users. This avoids conflict in the group and helps provide a space where staff feel comfortable expressing their opinions.

A facilitator should guide the discussion, ensuring that participants do not deviate too far from the subject area, and ensuring that everyone in the group gets to have their say. The facilitator needs to have a clear understanding of what the focus groups are trying to achieve as well as being a good listener. However, they should not influence people's opinions or impose personal views.

Prepare a Travel Report

The travel report details the transport issues identified in the research phase. The report should organise the data so it can be easily interpreted and used by the working group to develop the travel plan.

The report does not need to be a formal document. Some coordinators will prepare detailed reports, while others will keep the report to just one or two pages. Obviously, the depth of the report needs to be appropriate to the size of the workplace and complexity of the transport issues. We suggest the following report format as a guideline:

- Introduction outlining the purpose of the report, how the data was gathered and noting the response rate(s).
- Modes of travel a summary of the various modes of travel and percentage of people using these. (Graphs are an effective way of presenting this information.)
- Issues a summary of road safety concerns, on-site facilities, policy improvements, etc.
- Potential action points a suggested list of issues for the working party to discuss and recommend actions for.

It is a good idea to circulate this report (or a modified version) back to staff so they can provide feedback. It is likely that many respondents will be interested in seeing the results.

Chapter Four: Planning Phase

1. Overview of planning phase

Decide which actions will be taken and how and when they will be implemented.

Objectives

- Write the Travel Plan
- Gain staff and senior management approval for the travel plan

Steps

- 1. Prepare options for the Travel Plan based on the travel report findings
- 2. Consult with staff and working party on options
- 3. Greater Wellington reviews draft Travel Plan
- 4. Finalise plan
- 5. Gain senior management approval for the plan
- 6. Send Travel Plan to Greater Wellington

Important themes

The quality of the Travel Plan will depend on the level of participation of the working group and staff.

Greater Wellington provides

Travel Plan template

Completion of planning phase

The planning phase is complete when the workplace travel plan has been approval by senior management and Greater Wellington.

2. What the planning phase involves

Preparing the Travel Plan (Greater Wellington provides template)

The purpose of the Travel Plan is to outline the recommended targets and actions of the Travel Plan for senior management to approve.

The Travel Plan includes more detailed targets based on the results of the travel survey. When setting targets, it can be helpful to convert percentages to a number of people to gain a better picture of what the target would mean. For

example, a 20% reduction in the number of solo car drivers means 10 less staff driving alone to work.

The Travel Plan also details what action will be undertaken. For each action, include its priority, benefits, costs and who is responsible for this action. The benefits column can be a good place to use results from the research phase to justify each recommendation. For example, "Of the 10 people who currently drive alone to work and said they were 'likely' or 'very likely' to consider cycling more often, five chose a discount to buy a bicycle as one of three reasons that would make it easier for them to cycle to work."

Role of the working party

This quality of the travel plan will depend on the degree of participation by the working group and staff in deciding what actions will be recommended. It may be required for the travel coordinator and working group to engage with senior management early in this phase particularly where changes to corporate policies may be recommended.

The working group's role in preparing the travel plan is:

- reviewing the travel report, results of any consultation, and any coordinator recommendations
- reaching agreement on the priority issues, and exploring all possible solutions using engineering, education, promotion, enforcement, and policy strategies.
- Consultation with staff may be done by circulating the draft travel plan for staff feedback with an email that highlights the key questions you would like staff to respond to.

Chapter Five: Implementation and Completion Phase

1. Overview of implementation and completion phase

To implement the actions in the travel plan

Objectives

- Facilitate the implementation of all aspects of the Travel Plan and inform staff of all changes
- Review progress on the actions in the Travel Plan with the working group, signing off the tasks which have been completed
- Document progress and lessons learned.

Steps

- 1. Launch the Travel Plan
- 2. Implement the Travel Plan
- 3. Communicate your Travel Plan achievements
- 4. Complete Final Progress Report
- 5. Complete Lessons Learned Report

Important themes

- Reviewing the implementation of the strategies as the programme progresses
- Maintaining a commitment to implementation and to adjusting strategies where necessary

Greater Wellington provides

- Final Progress Report template
- Lessons Learned Report template

Completion of Implementation and Completion phase

This phase is completed when the actions in the Travel Plan have been implemented and signed off. As a guide, the implementation phase may span several months, but may extend beyond this if major engineering measures are planned.

Chapter Six: Continuous improvement cycle

1. Overview of continuous improvement cycle

To evaluate and improve travel plan

Objectives

• Evaluate how travel behaviour has changed since the initial travel survey

Steps

- 1. Coordinate launch of evaluation survey to staff
- 2. Greater Wellington provide feedback on survey results
- 3. Review progress and results
- 4. Improve or extend travel plan based on survey results

Important themes

- Reviewing the implementation of the strategies as the programme progresses
- Maintaining a commitment to implementation and to adjusting strategies where necessary

Greater Wellington provides

• Online evaluation survey

Continuous improvement cycle

This phase is ongoing as the travel plan should be embedded in the workplace's culture and be updated and modified to achieve continuous improvement. The evaluation surveys are typically undertaken annually, starting from one year from the date of the initial survey.

2. What the continuous improvement cycle involves

Evaluation Survey (Greater Wellington provides survey)

Greater Wellington Regional Council, Land Transport NZ and other local councils are very interested in understanding the benefits of Travel Plans, aligned with the five objectives of the New Zealand Transport Strategy. Therefore, New Zealand is aiming to establish best practice for monitoring travel plans. Key data are changes in kilometres travelled (KT) as a result of implementing a travel plan. This is measured by geo-coding the start of the commuting journey and mode of transport used.

Greater Wellington provides an online evaluation survey for all staff to complete, typically annually, starting one year from the date of the initial survey. As with the initial survey, it is important that as many staff as possible complete the survey to gain an accurate picture of changes in travel behaviour.