# Follow Up Survey Guide

# Greater Wellington's

# TRAVEL PLAN PROGRAMME



Choosing sustainable transport

November 2008



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Introduction

As part of travel plan, organisations working with Greater Wellington undertake a follow up survey. This guide is to help organisations adapt Greater Wellington's Travel

Plan Programme follow up survey to their specific workplace requirements.

Greater Wellington Regional Council gratefully acknowledges the Auckland Regional Transport Authority (ARTA) for their assistance in the development of Greater

Wellington's Travel Plan Programme processes and guidelines.

The follow up survey has been created with a certain amount of flexibility to allow adaptation for various situations and workplace conditions. However, there are core questions that are mandatory in order to fulfil Greater Wellington's (GW's) own

questions that are mandatory in order to fulfil Greater Wellington's (GW's) own commitments, particularly in regard to calculating KT (Kilometres Travelled) and travel

mode.

This guide will provide:

• A breakdown of the survey process and explanation of the different stages

• An example introduction cover letter

• Core mandatory questions required to maintain consistency in the national data

collection and to fulfil operational and funding requirements

Supplementary and possible optional questions

• An explanation of the purpose of each question

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Sustainable Transport Planner

**Transport Strategy Implementation** 

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# **Overview**

# 1. Follow Up Travel Survey Overview

The follow up survey will help you gain insight and understanding of the changes that have taken place in the way employees travel to work, and what has affected these changes. Its purpose is to assist in identifying whether the travel plan is successful and which initiatives are most effective in changing travel behaviour. It provides an evidence base from which you can celebrate successes, and promote and strengthen the organisation's commitment to the travel plan.

The survey includes two types of questions:

# 1.1 Mandatory questions:

The mandatory questions are required for monitoring purposes. From these questions, important data is captured from workplaces on patterns of overall travel behaviour throughout the Wellington region and to monitor travel mode shift over time. This information is required of Greater Wellington (GW) to meet transport objectives through the Regional Land Transport Strategy (RLTS) and funding requirements.

# Mandatory questions include:

- Home addresses to capture where people start their journeys
- Place of work (if there is more than one workplace)
- How staff travel to and from work (car, bus, walk, etc.)
- Work patterns (working hours, days of week)
- Duration of the journey to work

# 1.2 Supplementary questions

These questions are highly recommended as part of 'best practice' travel planning.

Supplementary questions provide important additional clues as to what is driving individuals' travel behaviour; about what actions the organisation could take (e.g. your workplace could have pool cars, flexi-work or work from home policies) and can provide useful information about the impact of any changes adopted in future.

As Greater Wellington collects data from supplementary questions at a regional level, the content and structure of supplementary questions may not be altered. However, if organisations consider certain supplementary questions as not suited to their travel plan they may be removed from the survey.

# Supplementary questions include:

- Attitudes towards existing transport modes and willingness to use them
- Perception of measures which can encourage a reduction in car use
- Level of support among staff for different initiatives which could be introduced

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# 2. Creating Your Survey

Greater Wellington's Travel Plan staff will assist you with determining the requirements for your survey that will meet the needs of your workplace.

# 3. Survey Response Rate

To ensure a higher response rate it is recommended you do the following:

- Promote your survey to all staff (e.g. through email, the intranet, posters, and staff newsletters)
- Include an enthusiastic letter of introduction from the CEO or other Senior Management explaining the reasons why the travel plan is being implemented and benefits for staff
- If a paper survey is used, make sure the survey instructs staff on how to return the survey easily (e.g. by mail, special drop boxes located in key locations, or to a specific person)
- Offer an incentive such as a chance to enter into a prize draw (NB if you do provide an incentive, you will need to ask for participants' names and a means of contacting them)
- Send out reminders just before the close date of the survey

# 3.1 Survey Timing

Careful consideration needs to go into the timing of your staff travel survey to avoid public holidays and school holidays.

Make sure there are no other surveys going on within your organisation at the same time to avoid confusion.

# 4. Distributing Your Survey

There are three options for delivery of your survey. All delivery options are "self completion". Staff can complete the surveys online, fill in a paper survey, or use a combination of online and paper surveys.

# 4.1 Online Survey

Online distribution is the most ideal and efficient of the survey methods – it is quicker, less expensive and more practical than paper surveys. Staff can access the survey on the internet via the unique survey link provided. Once they complete the survey online the data is automatically captured and results collated in real-time. This provides a way to monitor the response rate and report on results before the survey is closed.

GW has an online survey tool available to organisations participating in the Travel Plan programme. This service is fully subsidised and provided by GW to ensure quality measures are met. Greater Wellington's Travel Plan Programme staff will provide this service to your organisation during the Research Phase of the Travel

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Plan. Please advise staff at this time of any potential respondents with visual impairment and we can discuss customisation options.

# 4.2 Paper Survey

GW will provide a paper survey form that can be printed and distributed to staff at staff meetings or by internal post. This is typically only used when email and computers are not available to all staff.

With printing and data entry costs, distributing paper surveys is more resource intensive and is not ideal when you are working against tight deadlines.

GW does not provide the data entry resources. This cost will need to be covered by the workplace or travel planning organisation where paper surveys are distributed.

# 4.3 Online and Paper

In some situations a combination of online and paper surveys are used. This method is more appropriate where all survey participants do not have access to a computer. Again this involves a data entry cost that will need to be considered.

# 5. Collecting Survey Data

Regardless of the distribution method used, all survey data is captured and stored in an online survey tool. GW administers and manages the survey process. Secure individual accounts are set up for each organisation's survey and no one other than approved GW personnel has direct access to your data unless otherwise stated.

# 5.1 Security of Data - Privacy Act

All surveys are conducted in accordance with the New Zealand Privacy Act. The Act exists to prevent collected data being used for purposes other than that for which it was given. Guidance from the Act includes:

Personal data shall not be used or disclosed in any manner incompatible with the purpose for which it is collected.

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

In the case of the staff travel survey it is common to ask for personal details such as names and addresses. This information is used for mapping travel distances from individual home locations to the workplace, to create personalized journey planners, or run a prize draw. It is recommended you state on the survey why you need this information.

If the data contains addresses it should also state whom the results might be given to for various purposes. For staff joining a ridesharing scheme the information might be passed on to a company that will organise it. That company should also sign

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undertakings with you not to pass on the information. For ridesharing, you may also need to extend your company's registration under the Privacy Act.

Inquiries regarding the Privacy Act should be directed to:

The Office of the Privacy Commissioner PO Box 10-094, Wellington Telephone 04-474 7590 Facsimile 04-474 7595 0800 803 909 (for callers in other areas) enquiries@privacy.org.nz

# 6. Analysing Survey Data

By careful consideration and comparison of the information you have gathered in the initial staff survey and the evaluation survey, you can begin to form a picture of the changes that have taken place since implementation of the travel plan commenced. The comparative analysis of both sets of survey data is aimed at understanding:

- whether there have been changes in travel behaviour;
- the reasons for these changes;
- awareness of the travel plan and its aims/objectives;
- awareness and uptake of the initiatives and programmes implemented; and
- ideas and suggestions for ongoing improvement.

GW provides basic analysis of survey responses and a map showing where staff live and how they travel to work.

# 6.1 Survey Results

Within two weeks of the closing date of your follow up survey, GW provides basic analysis reporting to help you formulate actions and targets for your Travel Plan. The results of your survey are delivered in an Excel file and basic analysis graphs are provided in an image format.

Basic analysis consists of looking at the frequencies of responses. This will give you the percentage of people answering a question, for example eight out of ten staff (80%) travel to work by car. Analysis will show patterns and will help to you to define target audiences for different measures and indicate how these audiences should be approached.

The survey analysis includes:

- Cleaned dataset cleaned and checked for duplicate and incomplete responses, provided in comma separated values or excel format
- Survey tool summary of results These are tables or graphs summarising responses to each question. This is automatically produced by the survey tool and is useful for a first glance at your results

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Your survey will generate useful information above and beyond the basic analysis. Further details about analysing and interpreting your survey results can be found in *Appendix 2: Analysing Your Follow Up Travel Survey*.

For more advanced analysis, surveys can be analysed using specialist statistical packages such as Statistical Package for Social Sciences (SPSS), which is specifically designed to analyse social surveys, a database or spreadsheet packages. More complex analysis can include cross-tabulating responses by key variables such as age, gender, and method of travel or department, which means that you can target your initiatives more effectively.

# 7. Travel Plan Follow Up Report

Once you have completed the analysis of the follow up survey, using baseline data to show trends and effectiveness of the travel plan, you may wish to write these results into a report. It's useful to write a travel plan evaluation report or, alternatively, update your existing travel plan to capture the new findings and record recommendations for the ongoing delivery of the travel plan. The benefits of formalising the information into a report include:

- understanding how the travel plan implementation is progressing;
- celebrating successes and addressing the challenges;
- communicating and promoting the travel plan;
- drawing conclusions and recommendations to improve the travel plan; and
- renewing commitment and momentum to the travel plan process.

The format, style, content, and length will depend on the specific needs and requirements of your organisation and its travel plan. The follow up report can range from one to two pages of highlighted information to a detailed report with numerous pages. Your follow up report could include:

- Comparative results gathered from both surveys. The key information gathered will include changes in travel patterns, including mode shifts.
- Review of implementation progress including a report on progress of the implementation plan against targeted timeframes and findings from the follow up survey on awareness and uptake. This information shows whether the action plan agreed to in the travel plan is being successfully implemented.
- Recommendations for ongoing improvement the whole purpose of the follow up process is to review progress and learn from the experiences to improve the effectiveness of the travel plan. Recommendations made also need to be followed through to ensure that they are agreed to.

# 8. Sharing Survey Results with Staff

To maintain support for your Travel Plan, let all participants know the results of your follow up travel survey. This keeps everyone involved and is useful promotion for your Travel Plan. You can provide feedback by summarising the findings and sending them to staff via payslips, staff meetings, email, newsletters, or posters on notice boards.

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The advantages of letting staff know the results can be to:

- maintain or re-engage interest in the travel plan;
- highlight the need or desirability for ongoing change and improvement; and communicate the positive changes that are taking place. Often people will be more inclined to change their behaviour if they know that others have already done so.

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# **Appendix 1: Follow Up Travel Survey with explanations**

[Workplace Name] Staff Travel Survey

This survey is all about how you travel to and from work.

[Name of Employer] is participating in Greater Wellington's Travel Plan Programme aimed at promoting more sustainable travel choices and reducing dependency on the car for the journey to work. How we travel impacts directly on the environment and also on us personally - in terms of fitness, finance, personal satisfaction, time and quality of life. Changing our travel habits could potentially reduce traffic frustrations, parking hassles, and improve fitness levels.

We're working to develop a travel plan to give us simple and sustainable travel choices. This involves completing the staff travel survey to gather information about how we travel to and from work.

Please complete the survey - it's the first step in finding solutions to transport challenges we're facing. Your responses will help shape the future of travel to and from work.

This survey will take approximately five to ten minutes to complete. All completed surveys with contact details will go in to a draw to win [prizes]. Please be assured, your personal details and survey responses will be kept separate.

Thank you for taking the time to complete this survey.

Regards,

If you have any questions, please contact [Travel Planner]:

[Travel Planner Contact Details]

If you have any technical difficulties please ring Ping Sim on 382 7959 or email ping.sim@gw.govt.nz

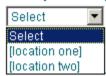
Note: You can exit and re-enter the survey at any time. To exit the survey, click the 'next' button at the bottom of the page then close the window. To return click on the original link you used to enter the survey. This takes you to the page where you last left the survey.

The following introduction letter is provided as an example and can be adapted for your organisation when sending out Greater Wellington's Travel Plan Programme follow up survey.

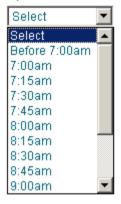
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### YOUR WORK JOURNEY

Which [insert company name] office/workplace do you usually work at?



What time do you **usually arrive** at your workplace? If your arrival time varies, please select the most common time.



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### **MULTIPLE WORKSITES**

This question applies for organisations with multiple locations/sites. This is presented as a drop down list with the different locations

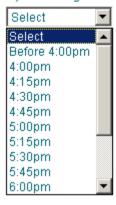
### **MANDATORY**

This question is mandatory; however the answer options are flexible depending upon the specific needs of the travel plan. The 30 minute morning interval is the typical answer list. The 24 hour clock interval is relevant for organizations that conduct business around the clock.

It is possible to select a subset of the 24 hour intervals to suit your travel plan.

Other modification to this question should only be made in consultation with GW.

What time do you **usually leave** from your workplace?
If your leaving time varies, please select the most common time.



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### **MANDATORY**

This question is mandatory; however the answer options are flexible depending upon the specific needs of the travel plan. The 30 minute morning interval is the typical answer list. The 24 hour clock interval is relevant for organizations that conduct business around the clock.

It is possible to select a subset of the 24 hour intervals to suit your travel plan.

Other modification to this question should only be made in consultation with GW.

Please provide your HOME address by clicking on the "PICK ADDRESS" link below.

### Please follow this link to pick your address

# Greater Wellington's travel plan programme

Choosing sustainable transport



# Home Address 142 Wakefield Street, Wellington Central, Wellington, New Zealand Frank Kitts Park Wellington Central Athera College Search again... Next >>>

### Tips

Step 1: Enter your street number, street name (including street type), and suburb, then press enter

### Tips

Step 1: Enter your street number, street name (including street type), and suburb, then press enter

Step 2: Select an item from the list, or modify your address in the text box

Step 3: Is this the correct location? If Yes, click "Next >>>" to return the survey.

If No, click on the map to select the correct location, then click "Next >>>" to return the survey.

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### **MANDATORY**

This information is essential to generate VKT (Vehicle Kilometres Travelled) and is required for monitoring to fulfil funding requirements.

### YOUR TRAVEL TO WORK

The questions in this survey relate to your **last full week of work**IF YOUR LAST FULL WEEK OF WORK WAS UNUSUAL, COMPLETE FOR A TYPICAL WEEK OF WORK.

### MANDATORY

This is a mandatory question for showing the kilometres travelled and change in mode share. This question is the most critical for monitoring the effect of workplace travel plans against the New Zealand Transport Strategy objectives.

\*5. Thinking of your last full week of work, please show how you travelled TO work each day and how long it took by selecting from the dropdown list.
If you use more than one method of travel, such as bus then walk, select the method you use for the longest distance. (for example: for a 5 km bus trip followed by a 1 km walk you would pick 'Bus').

	*MAIN method of travel TO work (ie. covers the longest distance)	HOW LONG did your journey take (from leaving home to arriving at work)?
Monday	Walked/Ran ▼	Between 15 and 29 minutes
Tuesday	Bus ▼	Less than 15 minutes
Wednesday	Walked/Ran <u>▼</u>	Select
Thursday	Select Walked/Ran	Select
Friday	Cycled Bus	Select
Saturday	Train/Ferry Drove alone	Select
Sunday	Drove with passenger(s) Passenger in a private vehicle	Select
6. Are your tra	Motorcycle/Scooter Did not travel - worked from home Did not work this day Other	your journey home <b>FROM</b> work?
O No		

Are your travel arrangements generally the same for your journey home FROM work?

O Yes

O No

### SUPPLEMENTARY

This question indicates the percentage of staff who travel home a different way. Only respondents who select 'Yes' here will be shown the 'Your travel from work' question on the following page.

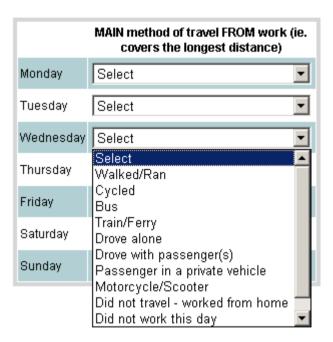
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### YOUR TRAVEL FROM WORK

Thinking of your last full week of work, please show how you travelled FROM work each day by selecting from the dropdown list.

If the last week was unusual, please use a typical week.

If you use more than one method of travel, such as bus then walk, select the method you use for the longest distance. (For example: for a 5 km bus trip followed by a 1 km walk, pick 'Bus').



### SUPPLEMENTARY

This question is recommended where it is likely that more than 10% of staff travel home a different way. For example, walk in but catch the bus home. Often people who use active modes travel home a different way.

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### CHANGES TO YOUR TRAVEL

Have you made any changes to how you travel to work since (date last travel survey) (or since you started work at (workplace name))?
For example, you used to carpool and now you drive alone or catch the bus.
O No, I haven't changed how I travel to work
C Yes, I have changed how I travel to work
Please tell us how you have changed the way you travel?
What methods of travel do you use MORE now? Select all that apply
□ Walk/Run
□ Cycle
□ Bus
☐ Train/Ferry
☐ Drive alone
☐ Drive with passengers
☐ Passenger in a private vehicle
☐ Motorcycle/Scooter
☐ Work from home
Other (please specify):

### MANDATORY

This question determines whether there has been a change in behaviour.

# MANDATORY

This question details which mode behaviour change has occurred.

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What methods of travel do you use LESS now? Select all that apply
☐ Walk/Run
☐ Cycle
□ Bus
☐ Train/Ferry
☐ Drive alone
☐ Drive with passengers
Passenger in a private vehicle
☐ Motorcycle/Scooter
☐ Work from home
Other (please specify):

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MANDATORY
This question details which mode behaviour change has occurred.

# MANDATORY

This question identifies what barriers car drivers face to changing behaviour.

# What are your reasons for driving to work? Please pick all reasons that apply then your main reason

	All reasons (check all that apply)	Main reason (check one)
Personal use of car during the day (e.g. shopping, gym, banking etc.)	Г	0
Save money		0
Public transport is unreliable or overcrowded	□	C
Public Transport is not available or is unrealistic for my journey		О
Need to use car for work	□	C
Save time		О
Drop off children	□	C
Impairment / disability		0
Convenience /flexibility	□	O
It's too far to walk or cycle		О
Other (please specify)	Г	0

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# I have changed how I travel to work because... Please select all reasons that apply then your main reason

	All reasons (check all that apply)	Main reason (check one)	
I moved house	П	O	
My job location or hours changed		C SUPPLEME	
The cost and/or availability of parking	Г	C changed beh	n identifies key reasons why staff have naviour.
The cost of petrol and other car related costs		o	
It's better for the environment	Г	O	
Health and fitness reasons		O	
The level of service of public transport	Г	O	
Convenience		O	
Other (please specify)	Г	•	

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# (Workplace name) TRAVEL PLAN

What are your main sources of information about the (workplace name) travel plan? Select as many as apply
☐ I have read about it on the intranet
☐ I know about/have talked to the travel planner
☐ I heard about it from my manager or colleagues
☐ I receive/read the travel plan newsletter
☐ I heard about it at an induction/orientation course
☐ I have read travel plan messages in emails
☐ I have visited the travel plan website
☐ I completed the first survey but don't remember anything more
☐ This survey is the first that I've heard of it
☐ Other (please specify):

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### SUPPLEMENTARY

This provides the travel planner with feedback on communications and marketing.

# (workplace name) TRAVEL PLAN

Listed below are a number of things that (workplace name) has done that support their travel plan. For each service or programme please indicate whether or not you know about or have used it.

### SUPPLEMENTARY

This provides information on how specific initiatives have been received by staff. The information category is for regular communications such as newsletters, websites and notice boards. The events category is for once off activites.

### Information sources, Education, News

Insert examples here C C C	

### Events (past 12 months)

	I didn't know about this	I know about this but didn't take part	I took part
Insert examples here	0	c	•

### SUPPLEMENTARY

This provides information on how specific initiatives have been received by staff.

The activities category is for ongoing or regular activities. The facilities and services could be physical infrastructure or services such as discount cards or pre paid public transport tickets.

### Activities (past 12 months)

	I didn't know about this	I know about this but haven't been involved	I have been involved	I have been involved frequently
Insert examples here	c	0	o	0

### Facilities and Services

	I didn't know about this	I know about but haven't used this	I use this occasionally	I use this frequently
Insert examples here	•	0	0	0

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### FINAL QUESTIONS

How long have you been working for (workplace name)? C Less than 6 months C 6-12 months C 1-2 years C 2-5 years O More than 5 years Are you... O Male C Female What is your age group? O 15-19 O 45-49 O 20 - 24 O 50 - 54 O 25 - 29 O 55 - 59 O 30 - 34 O 60 - 64 O 35 - 39 O 65 plus O 40 - 44 What best describes your working hours? Select • Select Fulltime, standard (e.g. 9AM - 5PM)

Fulltime, non-standard (e.g. night shift, call centre)
Part-time, standard (e.g. Mon – Wed; 9AM – 5PM)
Part-time, non-standard (e.g. Fri – Sat; 4PM – 12AM)

Flexible working hours Other (please specify):

### SUPPLEMENTARY

This question can show any variations in responses between staff who started before or after the travel plan began.

### SUPPLEMENTARY

This question SI needed to create a profile of people who are likely to shift travel modes.

### SUPPLEMENTARY

This question SI needed to create a profile of people who are likely to shift travel modes.

### **MANDATORY**

This gathers data on the current working hours of staff which is used to build a regional picture of working hours.

is there anything else you d'like to add or suggest regarding improving travel to work? All comments and suggestions are appre	ciated.
	A
	$\forall$

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# MOVING FORWARD

Are you thinking about changing the way you travel to work? Please select the option below you most agree with.
O I have no intention of changing the way I travel to work in the next six months
O I have been thinking about changing the way I travel to work in the next six months
C I have a plan of action or have tried getting to work a different way
If you would like to enter the prize draw or are happy to be contacted by your travel planner please select the correct options below then enter your name. Select as many as apply.
□ I would like to enter the prize draw
I am happy to be contacted by the travel planner about the options and support available to me. (If you are thinking about changing the way you travel we would like to offer you a personalised service).
□ I give permission to the travel planner to read my responses to this survey. (To enable the travel planner to provide tailored support or reply to your questions or comments you need to click here)
Please enter you name here if you wish to enter the prize draw or have selected any of the options above.
Note: If you have only indicated that you wish to enter the prize draw and are happy to be contacted by the travel planner your name will remain separate from your responses to this survey. By indicating that you would like a response to your comments or questions you are giving permission for the travel planner to see your name next to your responses to this survey.

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NOTE: Clicking the 'Finish Survey' button below will complete and submit your survey. Surveys must be

completed and submitted to be eligible for the prize draw.

### SUPPLEMENTARY

This set of questions provides the travel planner with a list of names of people intending to change how they travel.

# **Appendix 2: Analysing Your Follow Up Travel Survey**

# Interpreting and using the survey results

This section discusses what you should do with the results from your follow up survey. One of the first steps is pulling out the analysis (including the workings) that was carried out for the initial staff travel survey. It is important to be familiar with how that analysis was done to ensure consistency.

# Mode shift?

Following the same steps and logic that were used for analysing the "mode of travel to work" question in the first survey, you can compare your follow up survey results to the previous survey. This gives an initial indication of what changes have occurred since the implementation of the travel plan and whether you are on track to meeting your targets.

### Points to consider

There are a number of things to consider when comparing the data from the two surveys which may skew the results in either direction. Some of these considerations could include:

- Are the response rates different?
- Are there differences in which staff responded to each survey (new staff or staff on leave)?
- Is the total number of trips in each survey the same?
- Were the surveys carried out at different times of year?
- What external factors (i.e. petrol price) could influence behaviour?

# Changes in travel behaviour

The above analysis of how staff get to work and the mode shift that has occurred between surveys will already give an indication of whether changes have taken place. To understand these changes in greater depth, pull out all of the responses that indicated that they had changed their mode of travel, looking at what change they made and the reasons they provided for that change. Check the results of these questions looking at whether the total changes in modes support the findings from the total mode shift analysis. Due to different respondent populations and different methodology in each question it is unlikely that the results will be entirely consistent, however if they show similar trends, this will increase your confidence in the findings.

It is also important to analyse the responses where the respondent has indicated that they have continued to drive their car. Clearly, many staff who drive their cars to work will be unable or unwilling to change their behaviour and there is little a travel plan could do to influence this. However, analysing the reasons staff continue to drive their car should provide some hints as to how some of these staff could be effectively encouraged to consider alternatives, even on one or two days a week.

# Awareness and uptake of the travel plan

A final piece of standard analysis involves looking at the level of staff awareness of the travel plan and the uptake/use of the measures that have been implemented as part of the process. Reviewing this data should provide some useful insights. For example, it will tell you whether staff know about and think about the travel plan and the organisation's culture around travel.

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It will also show which measures and initiatives are being well used by staff and adding value to the workplace. Some measures may prove to be underused or not known about. Reasons for this could relate to the effectiveness of communicating the availability of measures or, alternatively, the value staff perceive in them. From these findings, decisions can be made regarding what parts of the implementation should be continued and improved and what should be reduced or ceased.

# Looking deeper

The above information looks at the standard analyses that should be carried out, however much more information can be found in each of the surveys. For example, it may be useful to understand whether there are differences in behaviour and awareness of the travel plan between new and old staff, whether people who drive cars are less aware of the travel plan and related initiatives, and how the distanced travelled to the workplace affects the way staff travel. All of this information and much more can be gleaned from the evaluation survey, and comparisons with the initial survey.

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