

Local Sustainable Transport Fund
Case Study Evaluation
Strategic Employment Sites and Business Parks
West of England Final Report Appendices

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Appendix 1: West of England employers participating in the SES evaluation 2014-16

This section summarises contextual information on travel demand obtained during semi-structured interviews with senior managers in both 2014 and 2016, supplemented by data provided by employers' estates departments or travel planners.

These notes are intended to aid interpretation of results from the Travel to Work surveys. The notes on individual employers are grouped into sub-area. For all those employers which participated in both 2014 and 2016, a chart shows commute mode share trajectories drawn from successive surveys.

A1.1 Emerson's Green

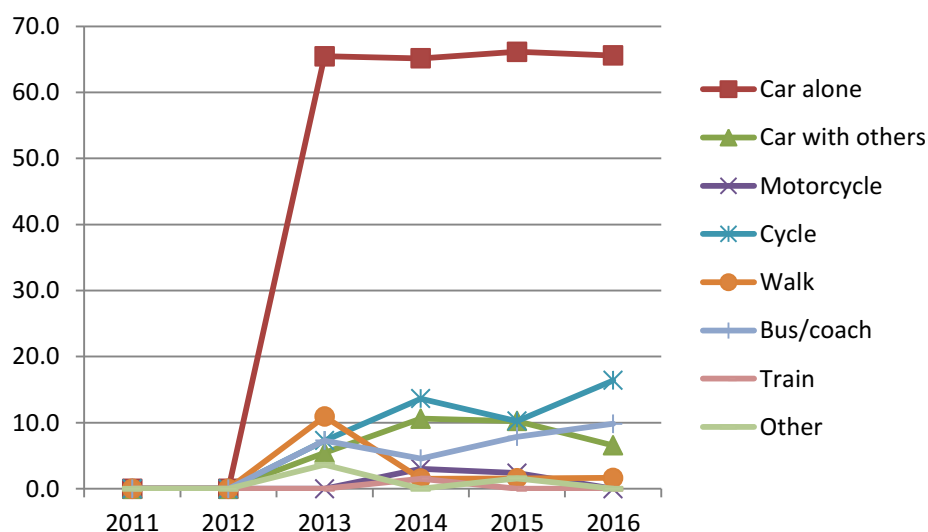
Emerson's Green is located close to a junction on the M4; local housing development is underway in the area. From late 2013, new bus services were introduced to provide quicker links to Parkway Rail Station and Bristol City Centre

Science Park

2014 and 2016 Interviewee: Science Park Director

Changes since 2014

The Science Park has good quality facilities for cyclists/walkers/runners. The numbers of business tenants and individuals working at the park have increased since 2014, and the Executive is now doing a feasibility study for the Phase 2 development. Ratio of car-parking spaces to number of staff has fallen since 2014, but is still considered to meet demand (just), so parking management measures have not been introduced.



Mode share changes: Science Park

Energy Technology Company (within the Science Park)

2014 Interviewee: Finance Director

Changes to business since 2014

This business had grown and relocated to the Science Park in 2012/13. It was selected as a desirable location because a staff survey had emphasised the importance placed by employees on good cycling facilities and access, which the park was deemed to offer. The company ceased to operate in 2015.

A1.2 Stoke Gifford (Parkway)

This sub-area is located around a northern section of the A4174 (ring road), near an M4 junction. The area experiences heavy traffic congestion at peak times, which 2016 interviewees at four of the five SES employers located here believed to have worsened since 2014. One lane of this section of the A4174 became a dedicated 2+ lane before the evaluation period. Interviewees generally regarded the 2+ lane as ineffective due to lack of enforcement. A dedicated bus lane had also been constructed on this road.

Bristol Parkway rail station is located in Stoke Gifford (good national rail connections), and bus services are frequent and have benefitted from improvements in recent years, particularly to/from the city centre, as well as coach links from North Somerset and Gloucestershire. Off-road cycle paths have benefitted from LSTF and other funding sources (e.g. Cycling City, Cycling Ambition Fund) – many prior to the 2104-16 evaluation period.

A number of new housing developments have been built in recent years; the development process has continued throughout the evaluation period.

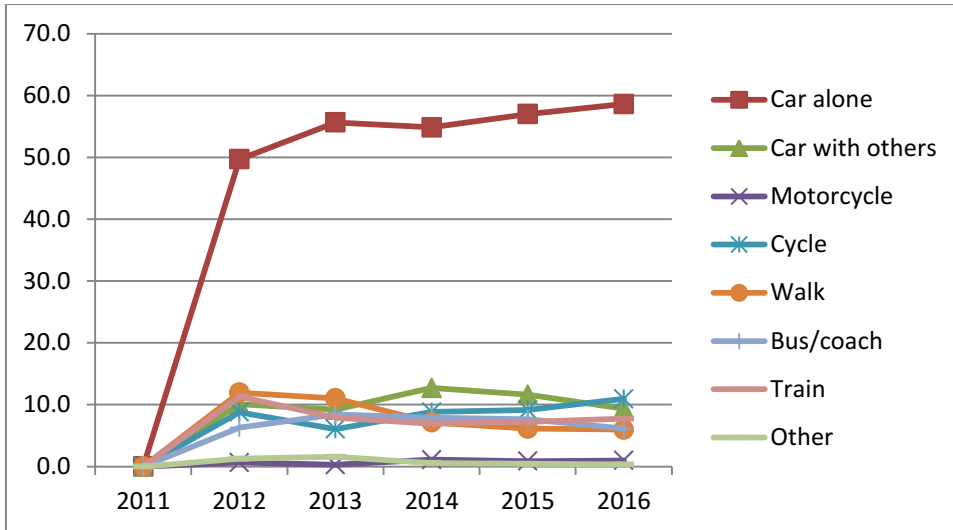
Financial Services Company (Stoke Gifford)

2014 Interviewee: Global Manager for Health, Safety and Environment

2016 Interviewees: Facilities Manager for the South region, and Travel Manager

Changes to business since 2014

The company was integrated into another national Financial Services company in 2014/15. Since 2014, staffing numbers have fallen at Stoke Gifford by approx. 500. The car park is managed (permits required) but spaces currently meet demand. The ratio of spaces to staff member had improved by 2016 due to the fall in staff numbers.



Mode Share changes: Financial Services Company

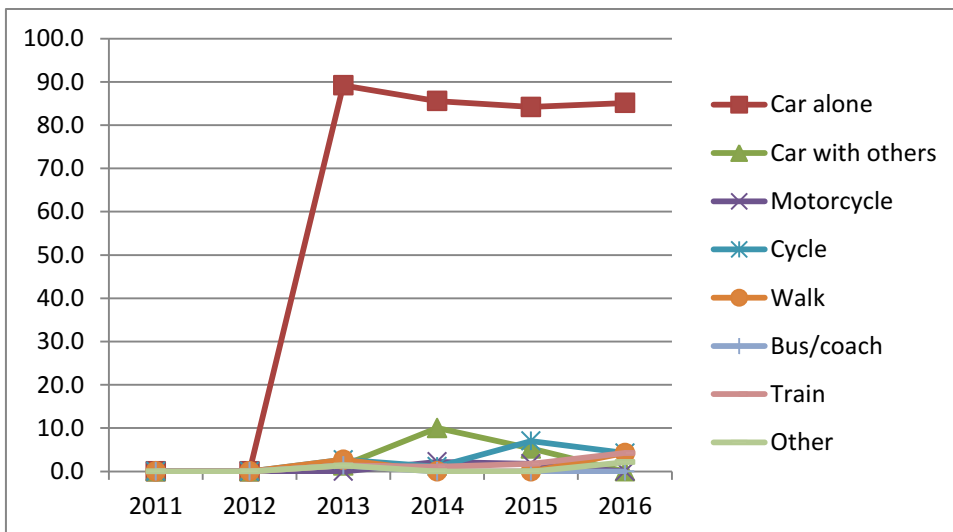
Construction Services Company (Stoke Gifford)

2014 Interviewee: Sustainability Manager

2016 Interviewee: Environmental Specialist

Changes to business since 2014

Although 390 people are employed through the Stoke Gifford office, only about 80 work there on a regular basis. There is a large car park which far exceeds current demand for spaces. The company has a culture of car-driving; most employees need to travel for work and are given a car allowance which increases in scale with seniority. However, the negative sustainability impacts of business travel are now receiving greater attention by senior management. Facilities for cycling were limited in both 2014 and 2016, but the company was due to relocate to another site in the same area, where better facilities were planned.



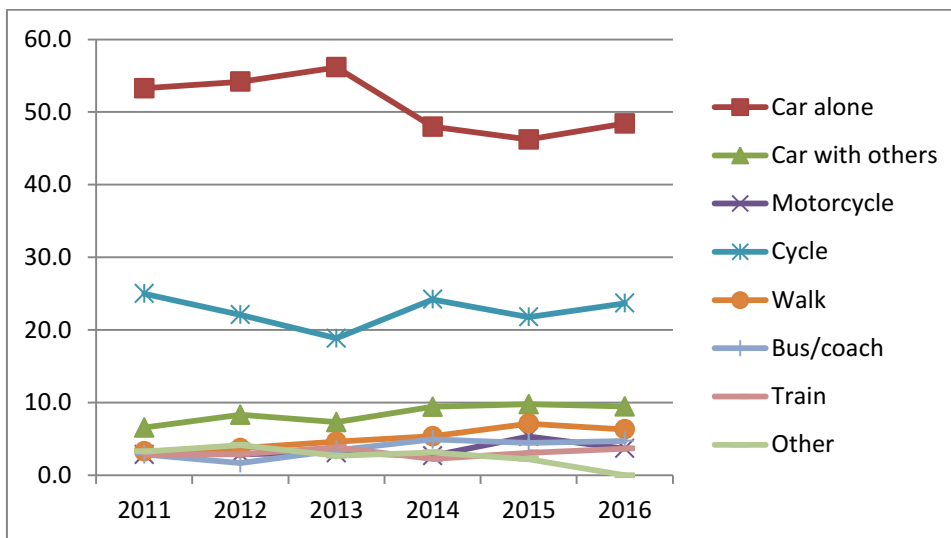
Mode share changes: Construction Services Company

Technology Company 1 (Stoke Gifford)

2014 and 2016 Interviewee: Vice President and Director

Major changes since 2014

The company at Stoke Gifford split into two parts in 2015. There was some reduction in staffing numbers. Car parking availability has met demand and has not been managed throughout the evaluation period. The business has a strong ('mature') cycling culture. Facilities had been improved and cycling commute mode share had increased before the evaluation period (already at 19% in 2013).



Mode share changes: Technology Company 1

Large Public Sector Organisation (Stoke Gifford)

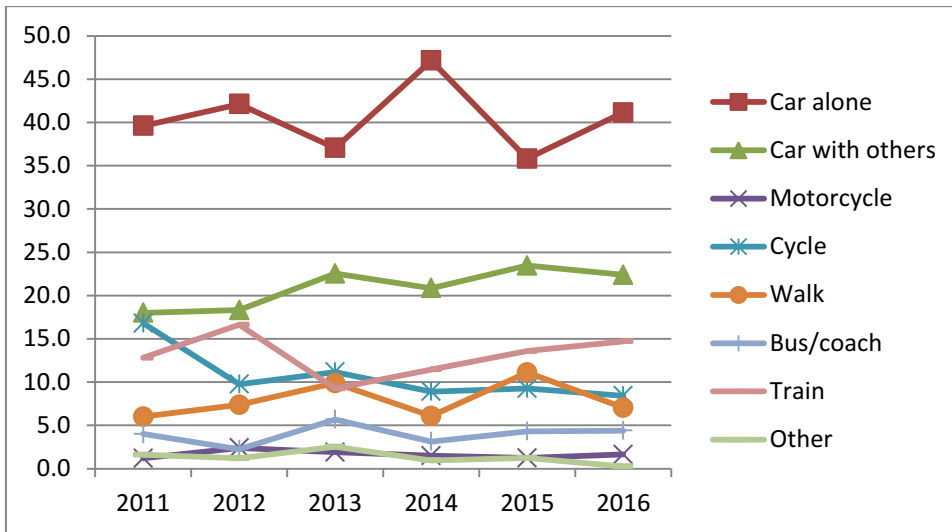
2014 Interviewees: Assistant Head of Infrastructure, and Facilities Manager

2016 Interviewees: Assistant Head of Infrastructure

Major changes since 2014

This organisation was suffering severe pressure on parking before 2014 and strict parking management measures were already underway. Planning permission was obtained for over 300 extra parking spaces during the evaluation period but the costs were prohibitive during a time of cuts, so the work did not go ahead. A very active, dynamic management of car parks is therefore required. Staff are allocated a colour-coded pass, depending on how far away they live. The colours which are allowed to park change at busier and quieter times (with advance warning of a few weeks). Staff living under 3 miles away may only park at quiet times of year – for example, restrictions are lifted in school holidays. Since 2014, contractors have not been allowed to park on site, and there is no parking for other visitors. At the same time, investment has been made in improving cycling facilities, which are of a high standard. The organisation has a higher than average proportion of train commuters, having subsidised travel costs for several years (now

ceased) following the relocation of large numbers of staff to the Stoke Gifford site a number of years previously.



Mode Share changes: Large Public Sector Organisation

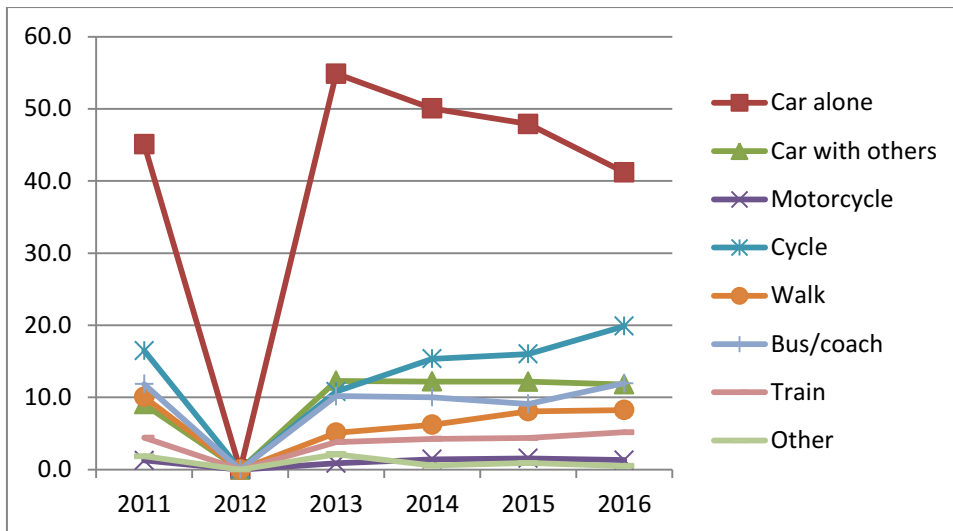
University (Stoke Gifford)

2014 and 2016 Interviewee: Deputy Vice Chancellor

Major changes since 2014

Since 2014 the university has been rolling out a policy of removing the right of students to park on the main campus. For a number of years it had been investing heavily in bus services, which led to improved service quality and lower fares. Bus subsidies were withdrawn in autumn 2015 when new services were deemed to have become commercially viable. Improvements in cycle parking facilities had begun before 2014, and continued throughout the evaluation period, alongside a variety of measures to encourage cycle use (e.g. loan bicycles for students, electric loan bikes for staff; information and events).

Car parking charges for staff had been raised before 2014. In early 2016, the university lost its largest car park, which had previously been available under a temporary planning agreement. Some replacement spaces were provided, but numbers of spaces reduced overall.



Mode share changes: University

A1.3 Filton

This part of the Bristol North Fringe is well connected by bus to the city centre and to some of the suburban residential areas, as well as by coach to Gloucestershire and North Somerset. Whilst geographically close to the M4 and M5, the connecting roads to the motorways suffer from heavy congestion, as do the arterial roads from the city. The area had already benefitted from cycle path improvements prior to the evaluation period. Large scale housebuilding had begun in the area prior to 2014 (including development of the former airfield), and is still underway. Fears were expressed by interviewees in both 2014 and 2016 that the area was approaching ‘gridlock’.

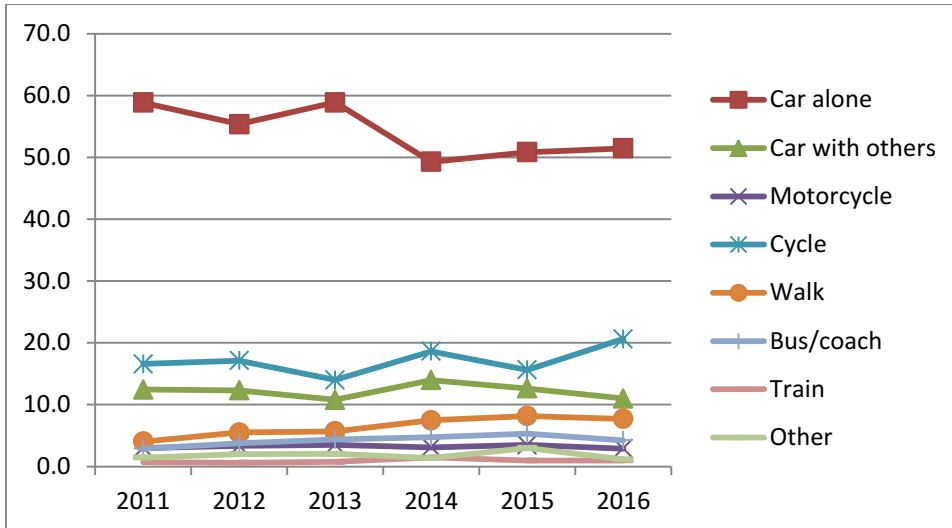
Aerospace Manufacturer 1 (Filton)

2014 Interviewee: Vice President for Engineering

2016 Interviewee: UK Head of Engineering

Major changes since 2014

Employee numbers on-site have fallen from approx. 4000 plus 2000 contractors in 2014, to about 3000 in 2016. They no longer have large numbers of subcontractors working on-site; instead the work is undertaken on the sites of suppliers, which may be ‘risk-sharing partners’. The business had been subject to parking-related planning conditions for a major new building at the Filton site, which came into use at the end of 2013; this might have contributed to the fall in SOC mode share from 2013 to 2014. Since 2014, their site has continued to be redeveloped, including the addition of extra cycle and car parking spaces, and the building of a large changing/showering/drying facility.



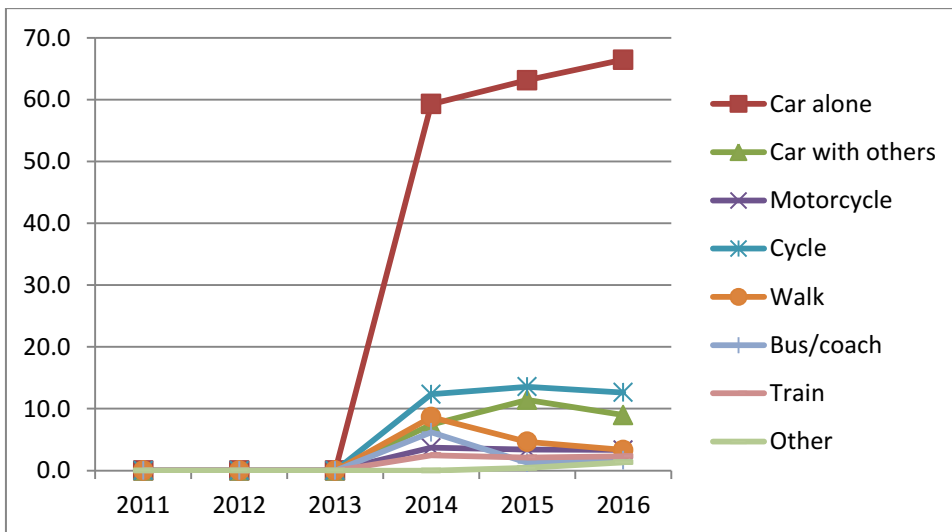
Mode share changes: Aerospace Manufacturer 1

Business Park (Filton)

2016 and 2014 Interviewee: Site Facilities Manager

Major changes since 2014

There has been some change in the businesses located in the Park since 2014, but overall numbers of people working there have remained similar. The biggest change in infrastructure is that an automatic number plate recognition system (ANPR) has been introduced, enabling detailed car park management to be carried out. This revealed that there were well over 25,000 vehicle movements on to the site in a typical month (staff and visitors). Businesses are allocated a number of parking spaces as part of their tenancy, but must pay extra for additional spaces. Good quality cycling facilities are provided.



Mode share changes: Business Park

NHS Trust (Filton)

2014 Interviewees: Director of Estates; Travel and Parking Manager

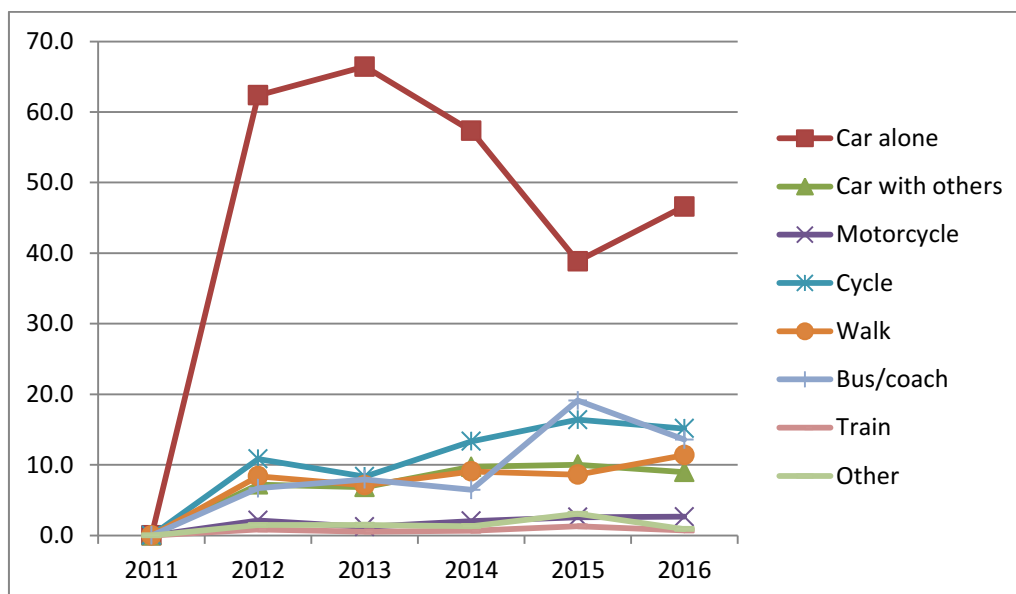
2016 Interviewee: Director of Estates, Facilities and Capital Planning

Major Changes since 2014

The new 'super hospital' opened on the site of the existing Southmead hospital (SMH) in April 2014. At the same time, Frenchay hospital (FH), 4 miles away, closed and services were transferred to the new SMH. The transfer of most staff and patients was concentrated into two weeks in May 2014, during which time 90% of staff and services moved.

One of the car parks at SMH was to be located where the old main hospital building stood, so could only be built in Phase 2, after the transfer to the new buildings had taken place and the old hospital demolished. The Trust maintained its old car park at FH in the interim, providing a staff Park and Ride service from there, and another from Cribbs Causeway, to SMH. This ran until October 2015, when the second car park at SMH was due to be completed. Although the aim was to end up with the same amount of parking at SMH as had previously been spread across the two hospitals, the construction of the new carpark was slower than planned, creating considerable competition for parking spaces in 2015. By 2016, more car parking was in place, although the balance between visitor and staff parking was still under review.

At the same time, the Trust invested money (including Section 106 money) and effort in improving and promoting a range of alternative transport modes – particularly bus subsidies. The Trust was active in providing travel information and personal travel planning for staff. Cycle parking was increased at the new site, and this process continued during the evaluation period as demand grew.



Mode share changes: NHS Trust

A1.4 Aztec West

The Aztec West Business Park is located further away from central Bristol than other parts of the North Fringe study area. It benefits from close proximity to the M4 and M5, although the connecting roads suffer from heavy congestion at peak times. This was exacerbated during the evaluation period by roadworks, some connected with local developments for the new Metrobus. The park has only one access road, and congestion causes lengthy delays for employees entering and leaving the park at peak times. The park is connected by bus to central Bristol, North Somerset and Gloucestershire, but services were not thought, in either 2014 or 2016, frequent or reliable enough by interviewees to attract many employees away from car travel. Improvements had been made to local cycle paths, but in 2016 interviewees were still concerned about safety risks to cyclists accessing the park by main roads from Bristol. Overall, it was felt that the park currently offered businesses neither sufficient car parking, nor adequate transport alternatives.

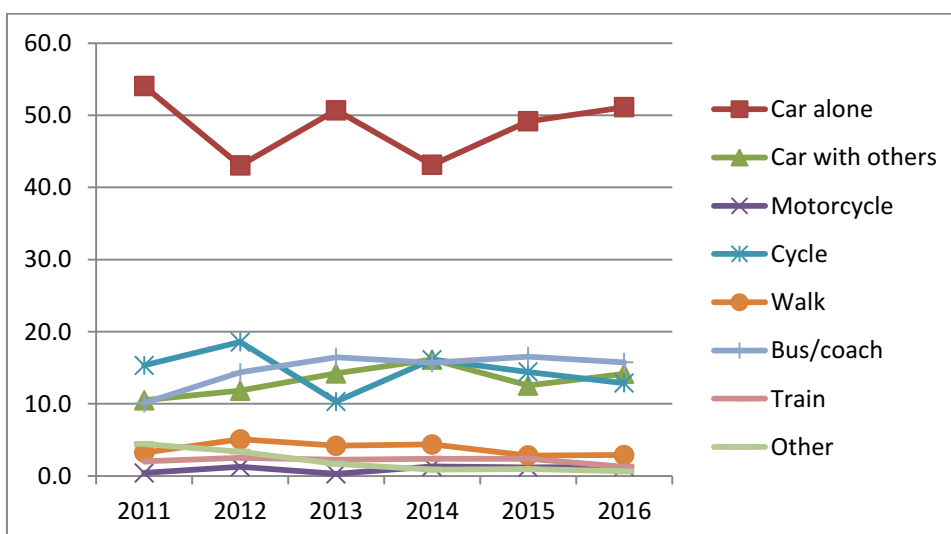
Engineering Consultancy 1 (Aztec West)

2014 Interviewee: Managing Director and senior director responsible for the Bristol office

2016 Interviewee: Growth and Strategy Director, Energy; senior director responsible for the Bristol office

Major changes since 2014:

This company had been tightly managing its car parking since moving to a new building on the park several years previously. Employees continue to outnumber parking spaces by 3:1. Measures to facilitate travel to work by other means have been in place since the office move (before the evaluation), including a large investment in providing company buses from central Bristol. There had been no changes to this situation since 2014.



Mode share changes: Engineering Consultancy 1

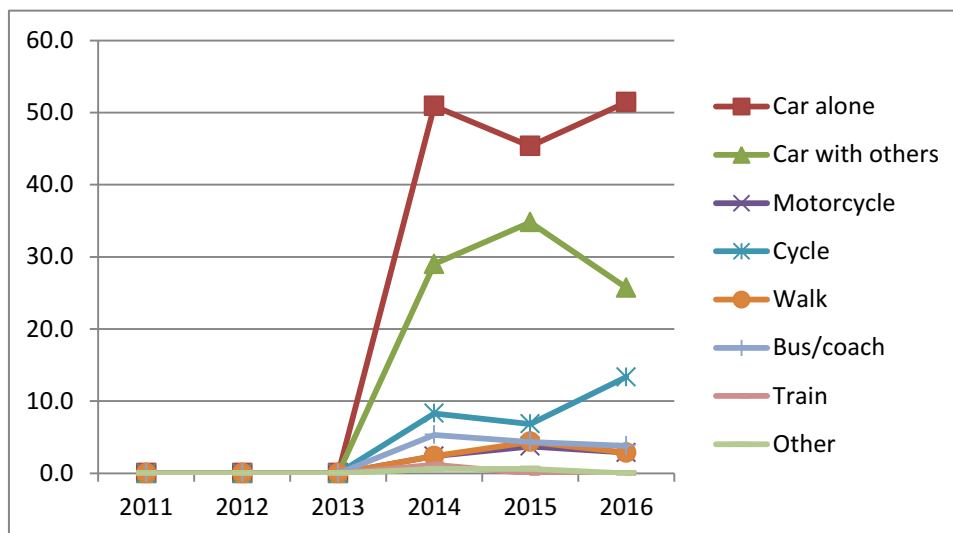
Engineering Consultancy 2 (Aztec West)

2014 Interviewee: Managing Director, Infrastructure

2016 Interviewee: Engineering Director

Major changes since 2014:

In 2014 they had moved to the business park only 18 months previously, and were still undergoing a transition as staff relocated from various other offices. By 2016, those people who really struggled with travelling to Aztec West had left the company. Car parking was limited to one space to 0.6 employees in both 2014 and 2016, and a tight management system was in operation. This company sees car-sharing as the main alternative to SOC, and has a policy of strongly prioritising car-sharers in the allocation of parking spaces. No major changes had occurred since 2014.



Mode share changes: Engineering Consultancy 2

Technology Company 2 (Aztec West)

Major changes since 2014:

This high-tech company provided high quality facilities for cyclists and pedestrians and had a relatively high cycle mode share according to the 2014 travel survey. The parent company closed down most of the office in 2015, so it did not participate in the follow-up part of the SES evaluation in 2016.

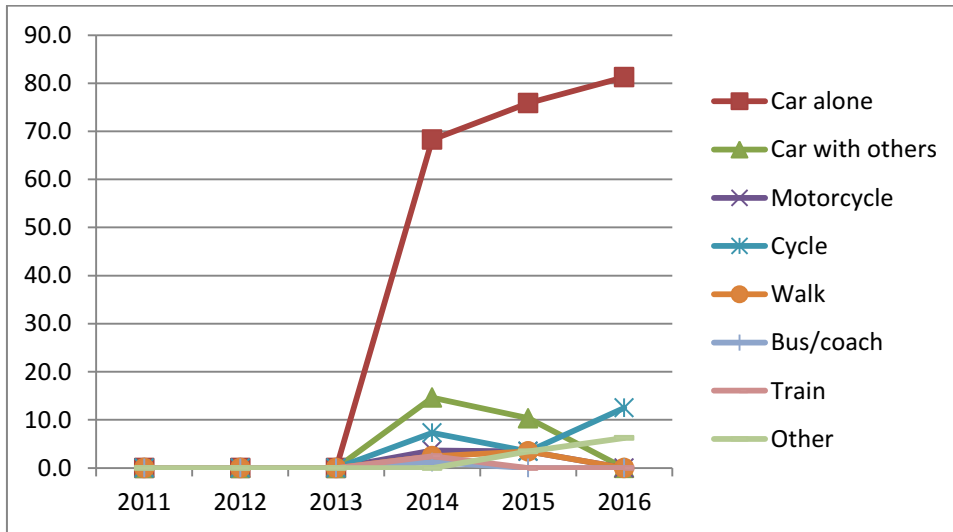
Technology Consultancy (Aztec West)

2014 Interviewee: Global Director for corporate responsibility and sustainability

2016 Interviewees: UK Environment Manager and lead for ISO 14001; Facilities Manager

Major changes since 2014:

There was a substantial reduction in numbers at the Aztec West site from 200 in 2014, to 40 regularly on site in 2016 (although the global business is growing). More people are based there officially, but rarely need to be there, as jobs are very mobile. One effect of this is that on-site parking supply now outstrips demand. The company is very active in reducing the carbon impact of its business travel, but travel to work has tended to be considered more a matter of personal choice.



Mode share changes: Technology Consultancy

Environmental Compliance Company, Aztec West

2016 Interviewees: Marketing communication specialist, and Commercial Director.

Major changes since 2014: New to SES in 2016

The company is relatively small, employing 45 people. They share the building's car park with other businesses; demand exceeds supply, but a parking management system is not in place. The company has a young staff, and encourages them to travel by alternative modes.

A1.5 Cribbs Causeway

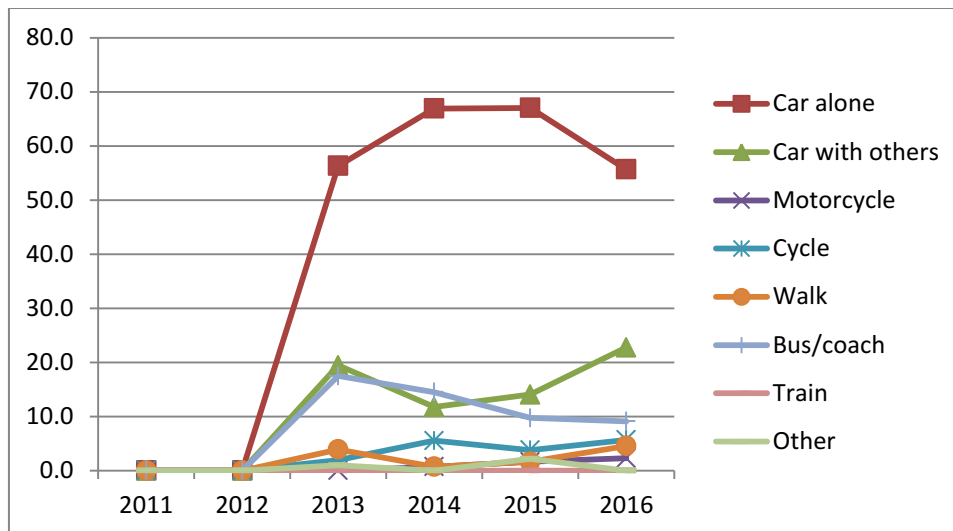
Cribbs Causeway is a large out-of-town shopping centre positioned beside the M5 and well connected by road to the rest of Bristol. It is well served by buses from the city centre, but has fewer orbital bus links. Improvements have been made in recent years to cycle paths connecting it to new local housing developments and other parts of North Bristol. The housing development (still continuing in 2016) is entailing ongoing building of new road infrastructure.

Retail Company (Cribbs Causeway)

2016 and 2014 Interviewee: Catering Manager and voluntary sustainability coordinator

Major changes since 2014

By 2016 staff numbers within the business at Cribbs Causeway had fallen by 20% (200 people) due to redundancies. Car parking meets staff demand and is not managed. Cycle facilities are provided.



Mode share changes: Retail Company

A1.6 Severnside

Severnside forms the Northern part of the Ports employment area, comprising traditional industry and new distribution parks. It is located close to the motorways and the Severn Bridge Crossings into South Wales, from where many employees travel. The area is much further from larger residential areas than are the study areas in the Bristol North Fringe. Severnside is very poorly served by public transport. Whilst off-road cycle paths were already present around the employment area in 2014, cycling to work was still seen by interviewees in 2016 as an activity undertaken only by a committed and fit minority who were prepared to cycle long distances. The car was perceived as very much the norm for travelling to work in Severnside, with car-sharing as the only viable alternative to SOC for most people.

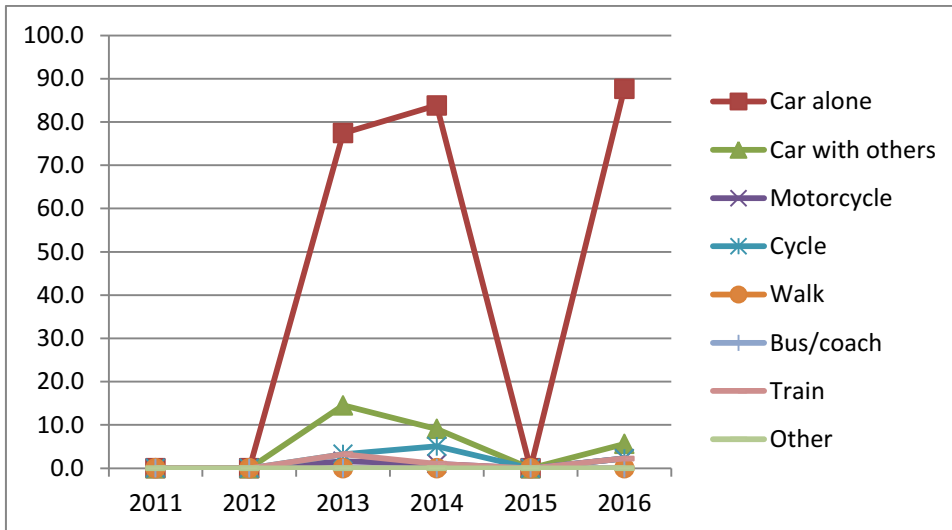
Aerospace Manufacturer 2 (Severnside)

2014 Interviewee: Head of Procurement and Logistics; and Engineering Group Leader

2016 Interviewee: Head of Procurement and Logistics

Major changes since 2014:

The production rate at this manufacturing company has increased 6-fold in the last few years and staff numbers have risen. The volume of business traffic and deliveries has also increased proportionally. Over the next two years the number of deliveries and dispatch deliverables to the customer will double, and staffing is expected to increase by a further 50%. Currently, car parking just meets demand, but space is available on-site for further parking development. Good cycling facilities are provided (in place before 2014).



Mode share changes: Aerospace Manufacturer 2

Mail Distribution Company (Sevenside)

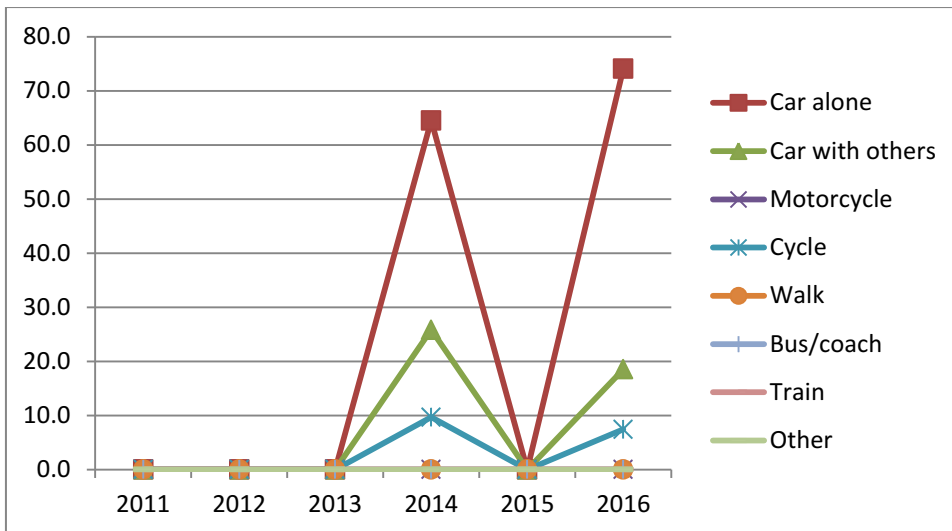
In 2014 the business had sufficient car parking to meet employee needs, and was not experiencing any particular pressures to improve facilities for other modes or encourage staff to travel differently. The business did not participate in the study in 2016.

Power Station (Sevenside)

Interviewee 2014 and 2016: Production Coordinator

Major changes since 2014:

There have been no major changes affecting travel since 2014. Staff numbers have not changed since 2014 and there is very little staff turnover (jobs are high-skilled and well-paid). There were no identified 'push factors' encouraging this business to encourage commuting by alternatives to the car.



Mode share changes: Power station

A1.7 Avonmouth

The Avonmouth employment area comprises a mix of distribution centres and more traditional industries, many grouped into separate business parks. Like Severnside, it is well connected to the motorways, but there is often heavy congestion and long delays getting on to the M5 in the evening.

Until 2015 there were no bus services into the business parks from local villages. There are two small railway stations on a branch line from Bristol, but many employers are located several miles away, and there was a perception that walking/cycling routes from stations were unpleasant and/or unsafe (although some improvements had been made by 2016). By 2016 there were two local bus services connecting Avonmouth rail station and local villages with some of the business parks.

A limited number of off-road cycle/pedestrian paths provided some access to and from local residential areas, but in 2014 these were generally perceived as unsafe for employees due to lack of lighting, isolation, and poor maintenance. By 2016, improvements such as lighting had been made to some stretches of path. Major road works on the main road running North-South caused traffic disruption during the evaluation period, but the ensuing improvements to cycle and pedestrian safety were welcomed. On-site cycling facilities for employees tend to be less developed than among the North Fringe businesses, reflecting a more car-dependent commuting culture

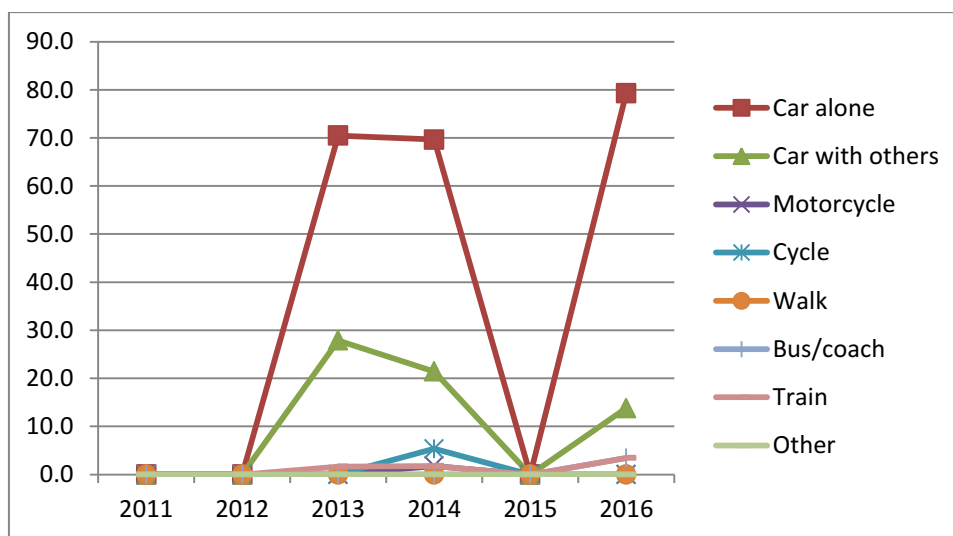
Skincare Products Company (Avonmouth)

2014 Interviewee: PA to CFO and Operations Director

2016 Interviewee: Office Coordinator : health and safety, facilities and fleet management

Major changes since 2014

The company at this site is principally carrying out packaging and distribution, and employs about 70 warehouse staff. In 2014, the only travel alternatives to SOC were car-share, or train plus a long walk. During the evaluation period, the business participated with the SevernNet business network in the successful bid for funding for a shuttle bus to link them with Avonmouth rail station and local villages. The bus had just come into operation at the time of the 2016 travel to work survey.



Mode share changes: Skincare products company

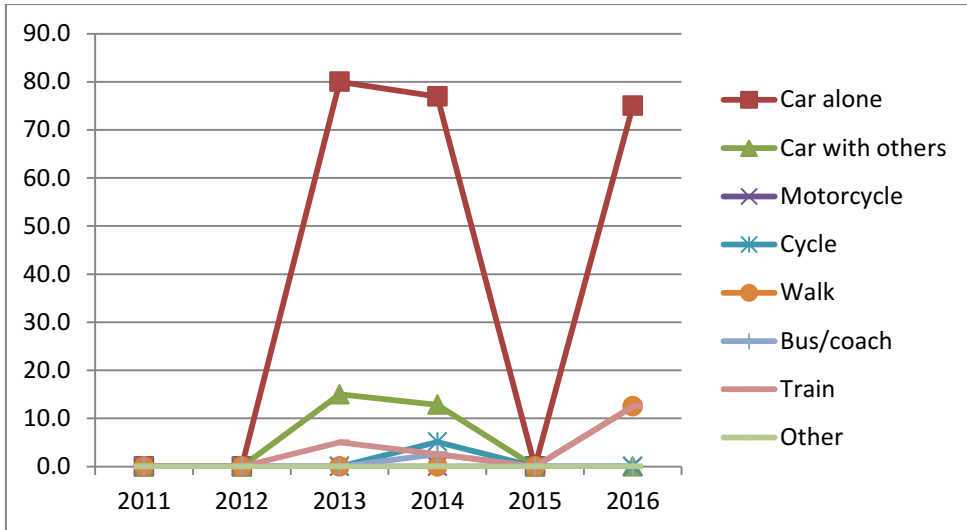
Bioscience Manufacturer (Avonmouth)

2014 Interviewees: Operations Director; Health, Safety and Facilities Manager

2016 Interviewee: Director of Human Resources

Major changes since 2014

In 2015 this manufacturing company moved from a central part of the Avonmouth employment area to its eastern edge, which is much more accessible by bus, train (Avonmouth station) and by bicycle from Bristol. It is also close to a Park and Ride. Improved accessibility was not a reason for the move, but it provided an added benefit. Staffing levels have not changed.



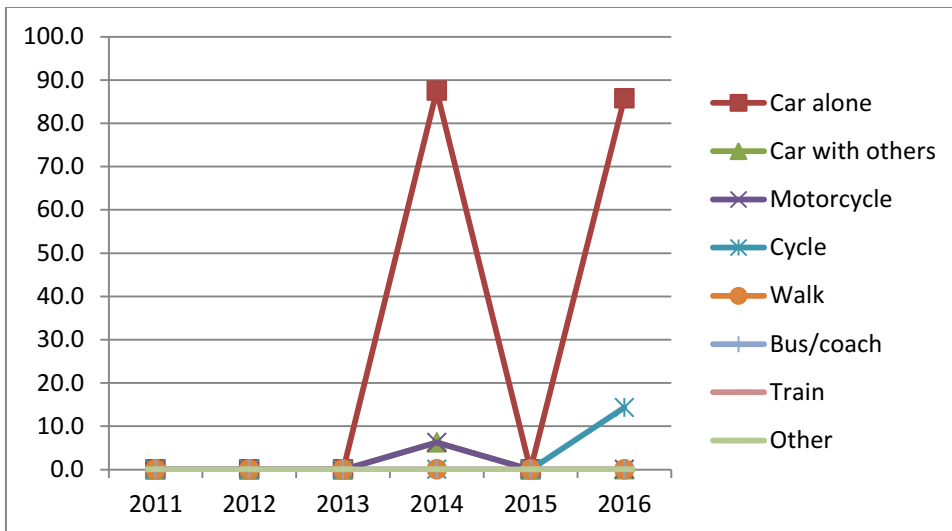
Mode share changes: Bioscience Manufacturer

Waste Recycling Company 1 (Avonmouth)

2014 and 2016 Interviewee: Production Manager

Major changes since 2014

There were no major changes to this site, which converts plastic waste into diesel, kerosene and light oil. There is sufficient car-parking, and in 2016, as in 2014, car travel to work was the norm. It became accessible by bus due to the extension of an existing service in 2015.



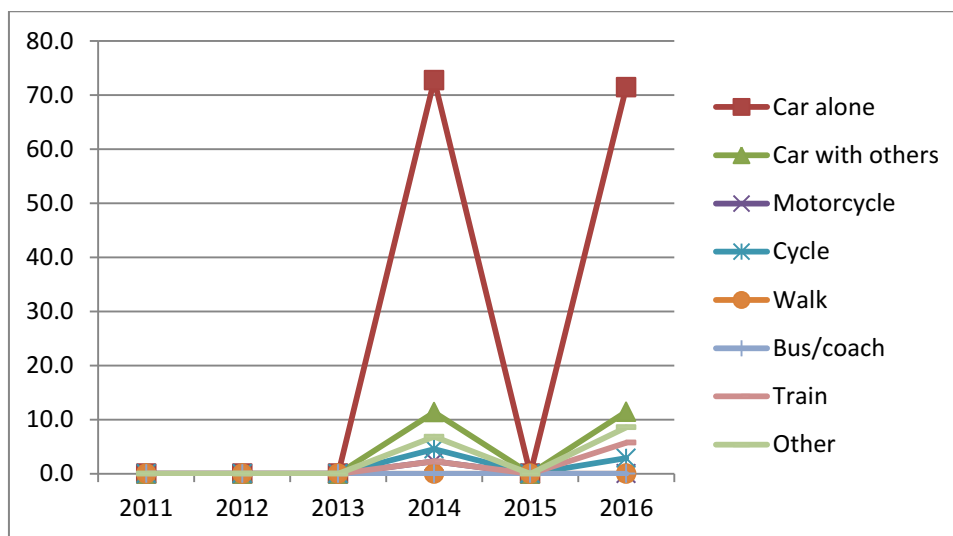
Mode share changes: Waste Recycling Company 1

Waste Recycling Company 2 (Avonmouth)

2014 and 2016 Interviewee: Sustainability Resources Manager

Major changes since 2014

There were no major changes to this facility for the recycling of the bio-solids and organic waste (sludge, sewage and food waste), although business opportunities for bio-methane as vehicle fuel continue to be investigated. Access by bus became possible in 2015. Although the company was not facing huge pressures to reduce SOC mode share, the difficulty in accessing the site for those without cars was still a concern. In 2016, remoteness and the heavy HGV traffic on surrounding roads were still seen as making cycling an unattractive commute option.



Mode share changes: Waste Recycling Company 2

Candle Products Company (Avonmouth)

2014 Interviewee: Director of Human Resources

This packaging and distribution centre employs large numbers of warehouse staff and, in 2014, had identified a strong need for bus provision, mainly to assist recruitment, but also because parking provision was becoming stretched. In spring 2016 it was in the process of moving to new premises, so was not able to take part in the follow-up study.

Catering Products Company (Avonmouth)

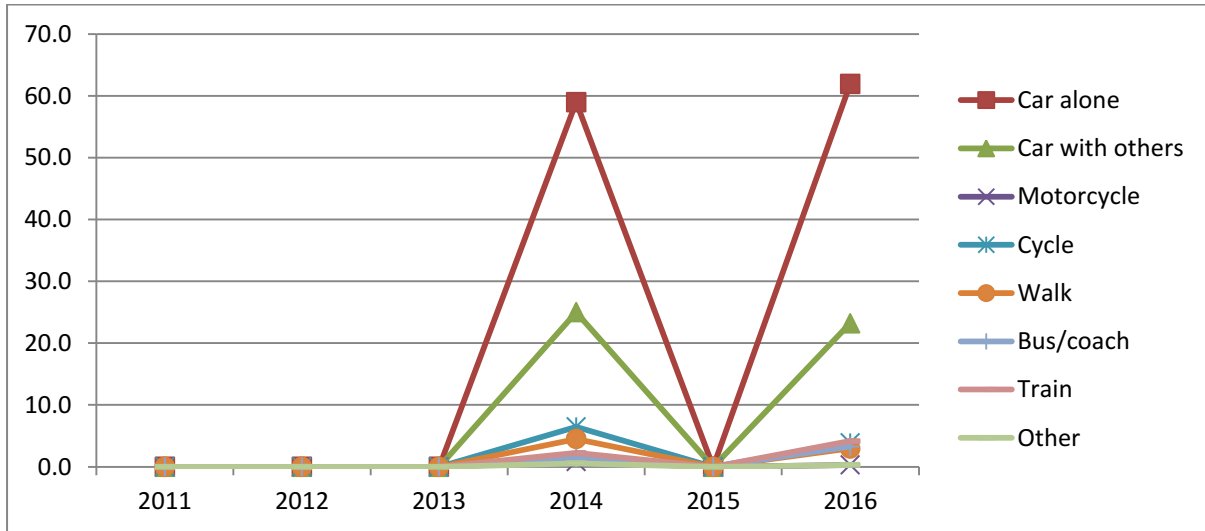
2014 and 2016 Interviewees: Managing Director; Engagement Manager

Major changes since 2014

The business has undergone expansion since 2014, both internationally and in Avonmouth. They have increased their product range and have needed to increase both their physical space and their employee numbers. They now have quite a large web team, as internet sales have become

more important, which means they now need to attract more people with these skills to Avonmouth.

They now own or lease several new warehouses, and are in the process of buying another warehouse and office block. The need for more car parking spaces is a major reason for purchasing the new building, as existing parking space is no longer quite sufficient. They are planning to build a new parking/changing/showering facility as part of a policy to encourage more cycling. The lack of local bus services prompted them to start running their own busses in 2015, in order to improve recruitment from local residential areas.



Mode share changes: Catering Products Company

Appendix 2: Sampling strategy and recruitment process, 2014

Sampling approach

The West of England research partners set out to recruit 10 to 15 employers in each of the two sites (North Fringe and Portside) to participate in the case study research (with involvement in all data collection activities). The aim was to select employers according to a number of criteria: size, industry sector, level of engagement with LSTF, and location within the North Fringe or Portside area. This was aimed at providing a range of employers (as sub-cases) which vary on these dimensions, which would enable identification and understanding of the factors which contribute to different outcomes.

The selection of employers for the study

An overview of the number, size and type of employers in the North Fringe and Portside areas was obtained from the following sources: 'Invest in Bristol' list of major employers (200+ employees) in Bristol and South Gloucestershire, 'Business in North Somerset' list (100+ employees), the Portside Area Travel Plan (May 2013); the 2013 Portside and North Fringe Travel Surveys, list of employers compiled by the Portside LSTF business engagement manager (BEAM), the SevernNet 'champions group', and SusCom membership information. Matrices were then developed to identify a proportional number of employers for the case study, varying on dimensions such as size and sector.

Sample selection in the Portside area

In Portside, we aimed to achieve a quota within sector and size strata (a simple quota sample). The sample was intended to be approximately proportional to the total number of companies in each of three size categories and in two main categories of industrial sector (manufacturing and distribution) in the area, plus an industrial parks category. This is shown in Table 1. It was also intended that participants be distributed across the geographical sub-areas of : Avonmouth/Cabot Park; Portbury; and Western Approach, as each faces different transport challenges.

Table 1: Summary profile of targeted businesses - Portside

Sector	Number of employees		
	Up to 100	101-250	251-500+
Manufacturing	3(+1)	1	1
Distribution	3	1 (+1)	1(+1)
Industrial parks	2		
Total	9	3	3

In each case (+1) denotes a company which is less engaged with sustainable transport issues. It was intended that the majority of selected companies be engaged to some degree, but approximately 3 non-engaged 'comparison cases' were also sought in each area, to be spread across sectors and sizes – this is the (+1) in the tables. Because the aim was to evaluate the impact of LSTF measures, and companies are more likely to be affected by these measures if they are 'engaging' with sustainable transport issues (for example, obtaining LSTF employer grants or hosting travel roadshows), the sample was not intended to be proportional to the current number of 'engaged' and 'non-engaged' businesses in the two areas.

Sample selection in the North Fringe

Because the North Fringe includes a number of very large public sector employers, the two dimensions were size and private/public sector employer (Table 2). A geographical distribution was also sought across the sub-areas of: Emersons Green; the Parkway station area; Filton; and the Aztec West Business Park.

Table 2: Summary profile of targeted employers - North Fringe

Sector	Number of employees		
	Up to 250	251-1000	1001+
Private	3(+1)	4 (+1)	2(+1)
Public		1	2
Total	4	6	5

The initial engagement process

Initial engagement with employers was undertaken collaboratively by the coordinators of the SusCom and SevernNet business networks, the two LSTF Business Engagement Managers (BEAMS) responsible for the Portside and North Fringe areas (both employed by South Gloucestershire Council), and the UWE researcher. Presentations about the case study were made at the SusCom members' group meetings in September and November 2013, and to members of SevernNet in early January 2014.

A list of 12 to 16 'first rank' target businesses was drawn up for each of the two areas in November-December 2013, by matching employers with the matrices shown above. A 'second rank' list of 7 to 8 employers in each area was also drawn up. Selection of 'first rank' employers was based on there being an active contact person within the business.

Individual approaches to the target employers were made by the SusCom and SevernNet coordinators and BEAMS, by telephone or email, via their own contact within each 'first rank' target business. The contact persons were those who represented their employer on local transport and travel issues, whether as part of their designated role (e.g. travel planner, facilities manager or parking manager within a large employer), or through adopting this role in an informal, but none-the-less recognised, capacity within their company.

The initial approaches involved introducing the case study, including an outline of the benefits of participating for the business, and an explanation of the commitment required from them over the two years of the study. An information leaflet about the study was sent to each employer. If an employer contact was interested in participating, the UWE researcher then made a follow-up call to discuss the project in greater detail, or to arrange the first element of the data collection (the senior manager interview). The contact in each business was requested to obtain confirmation of management support for participating in the study for two years. Verbal confirmation of management support was deemed sufficient for this purpose.

In some cases, full agreement to participate (or the decision not to participate) was confirmed swiftly, but where employers were more hesitant about being part of the study – and this was especially the case in the Portside area – a sometimes lengthy series of interactions took place both

within the business and with the research team over the course of several weeks or months, before agreement was secured and/or an interview arranged, or before participation was declined. The UWE researcher alone logged approximately 50 telephone calls/email interactions with businesses in the North Fringe, and a further 50 with Portside businesses, as part of the recruitment process between December 2013 and February 2014.

Results of the recruitment process - Portside

In the Portside area, 6 of the 16 first rank businesses agreed to participate, and an additional 4 were later recruited from the reserve list. Table 3 shows actual recruitment to the case study in the Portside area by March 2014 (actual numbers shown in italics, below the target numbers). The target minimum of 10 businesses had been reached, although one of these withdrew in early March due to restructuring within the company. This had a negative impact on the geographical spread of participants, as this had been the only business located within the Portbury sub-area. However, the other two sub-areas are both represented. The Portbury business which withdrew nevertheless agreed to the inclusion of the senior management interview in the case study data.

Four of the recruited participants are distribution businesses specialising in packaging and distribution of, respectively: catering equipment; skincare products; candles; and mail. Two are manufacturing companies: one in aerospace, the other in bioscience products. In the remaining category, one is a power station, and two are waste and recycling companies.

Table 3: Actual recruitment, 2014 - Portside

Sector	Number of employees		
	Up to 100	101-250	251-500+
Manufacturing	3(+1) <i>1</i>	1 (+1)	1(+1) <i>1</i>
Distribution	3 <i>3</i>	1 <i>1</i>	1 <i>1</i>
Industrial parks	2		
Energy and recycling	<i>(+3)</i>		
Total	9 <i>7*</i>	3 <i>1</i>	3 <i>2</i>

*Reduced to 6 after the withdrawal of a distribution business.

The main reason cited by those who declined to participate in the study was a lack of enthusiasm for undertaking a staff travel to work survey, which was perceived by some to be a likely source of disruption to the workforce. Two of the target companies declined because they had just, or were about to run their own staff survey. Some businesses had run the survey last year, and had hoped to see signs of improvement to the local transport situation as a result, but were not convinced that this had happened. As a result, a sense of frustration about the perceived poor transport situation in the Avonmouth, Portbury and Severnside areas had made some employers disinclined to repeat the

survey, and therefore unwilling to commit to the case study. One consequence of this was that, in the main, only those businesses which had remained engaged on sustainable transport issues with SevernNet and the LSTF BEAM agreed to take part in the study. However, among the eventual nine participants, there were three which were relative newcomers to engaging on local transport issues (the energy and recycling businesses). Therefore, the target number of three 'less engaged businesses' in the sample was met. Only one of the nine businesses – the Aerospace Manufacturer – had received an LSTF employer grant, and none had received an LSTF Sustainable Travel roadshow)

Results of the recruitment process – North Fringe

In the North Fringe, the maximum target number (15) of employers had been recruited by March 2014. Ten of the 12 first rank targeted employers agreed to participate in the study, and a further 5 were recruited from the reserve list. Three of these five had not previously engaged with LSTF or SusCom. Table 4 shows the actual recruitment numbers in italics below the target number in each stratum, with the less engaged businesses in brackets.

Of the 15 participants, 8 are in the manufacturing, telecommunications and software. The manufacturing participants include a major aerospace company. Two of the participants among this eight are science/business parks, each representing a large number of small companies (mainly aerospace). Two businesses provide engineering consultancy and support services. Additionally, there is one employer in each of the following sectors: construction; financial services; and retail. There are also three large public sector employers, representing significant employment in the area (two of these employers have approximately 9000 employees). The participants covered the full range of geographical sub-areas: Emerson's Green, Parkway, Filton and Aztec West business park. Five of the employers were new to SusCom and LSTF at the beginning of the SES recruitment process: (the technology consultancy, the energy technology company, technology company 2, one of the engineering consultancies, and the business park), and were therefore 'less engaged'. However, some had recently received, or were in the process of receiving LSTF employer grants during the same period.

Table 4: Actual recruitment – North Fringe, 2014

Sector	Number of employees		
	Up to 250	251-1000	1001+
Private	3(+1) <i>2(+3)</i>	4 (+1) <i>3(+1)</i>	2(+1) <i>2 (+1)</i>
Public		1	2 <i>3</i>
Total	4 <i>5</i>	6 <i>4</i>	5 <i>6</i>

Differences in recruitment outcome between the two areas

The difference in recruitment outcomes in the Portside area (9) and North Fringe (15) may reflect a difference in the extent to which employers were already networking with one another in the two areas on transport issues (including accessing LSTF). This in turn reflects the difference in maturity of

the SusCom and SevernNet business networks. The former has a larger membership and is exclusively concerned with sustainable transport issues, whereas SevernNet has a broader remit and is not a membership organisation. The North Fringe is also, generally, better connected to public transport and cycle networks (especially the Parkway and Filton areas), which means employees have a greater choice of transport modes. The North Fringe has also benefitted from more visible LSTF funding, including subsidised bus services, and 'sustainable travel roadshows' to encourage behaviour change (which are currently less valuable in the Portside area because fewer transport alternatives are available to enable behaviour change).

Appendix 3: Senior Manager interview topic guide, 2014

Interview topic guide

Introduction

- Outline of the project – briefly run through key aspects of the research.
- Ethics: are you happy for the interview to be recorded? Please could you read this consent form and sign it if you are happy to proceed.
- You have the opportunity to remain anonymous in both the data and reporting OR to be identifiable (through job title and company for example). In the latter case, you will have the opportunity to review a transcript of the interview and remove anything which you would prefer, with hindsight, to be withdrawn.
- In this interview we are seeking where possible a ‘corporate perspective’ on transport issues within X. If there are areas where you feel your own opinions diverge from the broader company view, this is also of interest to us, but it would be helpful if you could identify them as your personal views.
- The interview will take approximately 40 minutes.

Opening question

- Firstly, please could you outline your main areas of responsibility within X (business/organisation)

1. The relative importance of transport compared with other business concerns

- How much importance would you ascribe to transport issues, compared with other factors affecting the performance and competitiveness of your business/organisation overall?

2. Identification of specific transport issues relevant to the business

If interviewee has ascribed it low importance compared with other issues:

- Do you think that any of your major business concerns have a transport dimension?

Prompts:

- Possible links to concerns mentioned by interviewee, e.g. access to a skilled workforce.

- Can you identify any other specific transport matters which affect your business, and how?

If interviewee has already identified specific issues which he/she sees as important, ask:

- You said that X has an important influence on your business performance. Please can you expand on how and why it affects the company?

Answers might refer to:

- *commuting issues for employees (if so, move to Q3. and return to the following issues later)*
- *access for 'clients' (including students and patients for relevant organisations);*
- *employees' travel in the course of work*
- *freight and logistics.*

3. Commuter Transport questions

- How much importance would you ascribe to **commuter** transport issues? How and why do they affect your business?

Detailed follow-up questions might include:

- Do you have any organisational issues which impact - positively or negatively – on commuting?

Prompts:

- *large shifts starting and finishing at the same time;*
- *evening/night shifts;*
- *ability to work flexibly and/or from home.*

- What physical transport issues are most relevant to your organisation in terms of commuter access?

Prompts:

- *location and accessibility;*
- *public transport availability and reliability;*
- *cycle paths and on-site facilities;*
- *on-site parking; road congestion.*

- *(show area map to facilitate discussion)*

- To what extent do you think these physical and organisational factors affect your business performance?

- *Prompts:*

- *absenteeism*

- *staff productivity,*
- *staff recruitment and retention, and if so, how?*

(Also interesting to see whether interviewees express views about staff wellbeing in terms of social responsibility as well as economic arguments).

- Might commuter transport issues affect any of your company's planned re-location or expansion decisions, and if so, how?

If concerns relating to about commuter travel have been identified, ask:

- What do you believe needs to be done to address the concerns you described about X, both now and in the longer term?
- Has anything been done so far to try and solve this problem, and is anything being done now?

4. LSTF questions

- Do you know anything about the Local Sustainable Transport Fund?
 - If yes:
- Do you have any experience of, or views about it?
- Do know about any specific measures, and if so, what impact do you believe they have had?
- What LSTF measures do you expect to see over the next two years, and how do you anticipate them affecting your business? OR How do you think LSTF should be spent?
- If no:

Briefly explain it some of the measures being undertaken through LSTF.

- Do you think measures such as this might have any impact on your business?
- If you are planning to undertake transport-related measures independently of LSTF, what are these? How do you think the LSTF might best support them?

5. Concluding questions

- *(If not already covered previously):*

- Do you think the transport developments we have discussed today can make a positive contribution to your business? If so, how? If not, why not?
- Is there anything you would like to add?

Then, ask them to fill in Qs 26, 27 and 28 of UoH survey.

Finally, I'd ask you to consider whether you wish your company to be named or anonymised in the reporting of the research. Please bear in mind that, because of the nature of some of the company-related information collected (e.g. industrial sector, size), companies may be identifiable even if pseudonyms are used. If you are concerned about this, you have the opportunity to read interview transcripts and remove any information which, in hindsight you are not comfortable with being stored and reported.

Thank you very much for your help with our research.

Additional Closed Questions adopted from Hertfordshire Employer Survey

Q1. On a scale of 1 to 5 where 1 = very poor and 5 = very good, how would you rate your section of the Bristol North Fringe with respect to the following aspects of the labour market?:

	Very poor 1	Poor 2	Neither 3	Good 4	Very good 5	Don't know 6
Access to a suitable workforce						
Access to a specific skills in the workforce						
Labour costs						

Q2. On the same scale how would you rate your section of the Bristol North Fringe with respect to the following aspects of the local economy?:

	Very poor 1	Poor 2	Neither 3	Good 4	Very good 5	Don't know 6
Proximity to suppliers						
Proximity to customers						
Costs of land, property and rents						

Q3. On the same scale how would you rate your section of the Bristol North Fringe with respect to the following aspects of transport?:

	Very poor 1	Poor 2	Neither 3	Good 4	Very good 5	Don't know 6
Access to the motorway network						
Access to the local road network						
Public transport links for staff						
Public transport links for business travel						
Availability of parking						
Range of bus links available for your staff						
Frequency of buses for your staff						
Convenience of bus stops for your business						
Safe cycling routes for staff						
Pedestrian access						

Appendix 4: Senior Manager interview topic guide, 2016

SES Case study evaluation, Employer Interviews Topic Guide, 25/01/16

Name:

Introduction

- *Outline of stage 2 of the project – Remind the interviewee about the purpose of the research, and briefly run through key aspects of the follow-up study.*
- *Ethics: are you happy for the interview to be recorded? Please could you read this consent form and sign it if you are happy to proceed.*
- You have the opportunity to remain anonymous in both the data and reporting OR to be identifiable (through job title and company for example). In the latter case, you will have the opportunity to review a transcript of the interview and remove anything which you would prefer, with hindsight, to be withdrawn.

In 2014 you elected to/not to remain anonymous. Do you wish to do the same again?

- In this interview we are again seeking where possible a ‘corporate perspective’ on transport issues within X. If there are areas where you feel your own opinions diverge from the broader company view, this is also of interest to us, but it would be helpful if you could identify them as your personal views.
- The interview will take approximately 45 minutes.

Opening question (warm up)

- Firstly, please could you outline your main areas of responsibility at x.
- *If different person, how their role differs from that of the previous interviewee*

1. Identification of specific transport issues relevant to the business	2014 responses
<ul style="list-style-type: none"> • Do you think that any of your major business concerns have a transport dimension? <i>Can you tell me how transport issues affect the operation of your business/organisation here at...? How important are they?</i> • You said that X has an important influence on your business performance. Please can you expand on how and why it affects the organisation? • <i>Answers might refer to:</i> <ul style="list-style-type: none"> - <i>commuting issues for employees (if so, move to Q3. and return to the following issues later)</i> - <i>access for 'clients'</i> - <i>employees' travel in the course of work</i> - <i>freight and logistics.</i> • <i>Has anything changed with regard to the above over the past 2 years, and if so, what were the causes?</i> 	<p>2014 comments:</p>

<p>2. Commuter Transport questions</p> <ul style="list-style-type: none"> • <i>Try to link responses to LSFT measures where possible, and probe the influence of such measures.</i> 	<p>2014 responses</p>
<ul style="list-style-type: none"> • How much importance would you ascribe to commuter transport issues? How and why do they affect your business? 	<p>2014 comments:</p>
<ul style="list-style-type: none"> • Do you have any organisational issues which impact - positively or negatively – on commuting? <p><i>Prompts:</i></p> <ul style="list-style-type: none"> - <i>large shifts starting and finishing at the same time;</i> - <i>evening/night shifts;</i> - <i>ability to work flexibly and/or from home.</i> 	<p>2014:</p>
<ul style="list-style-type: none"> • What physical transport issues are most relevant to your organisation in terms of commuter access? <p><i>Prompts:</i></p> <ul style="list-style-type: none"> - <i>location and accessibility;</i> - <i>public transport availability and reliability;</i> - <i>cycle paths and on-site facilities. (LSTF measures?)</i> - <i>on-site parking; road congestion</i> 	<p>2014:</p>

<ul style="list-style-type: none"> • To what extent do you think these physical and organisational factors affect your business performance? • <i>Prompts:</i> <ul style="list-style-type: none"> - <i>absenteeism</i> - <i>staff productivity,</i> - <i>staff recruitment and retention, and if so, how?</i> 	
<ul style="list-style-type: none"> • The travel to work survey for your staff showed that.... (<i>refer to mode shares in 2014 and 2015 if available</i>). • Do you think there were particular external occurrences or local policies/measures which influenced how your staff have travelled to work over the past two years? If so, how? 	2014:
<ul style="list-style-type: none"> • Have you taken any measures as a business, with or without the support of local authorities etc., to influence the way in which your staff travel to work? If so, what impact has this had? <p>Have any other changes taken place since 2014? If so, when? (<i>any LSTF links?</i>)</p> <ul style="list-style-type: none"> - parking permit rules? - number of car parking spaces? - EVCPs? - Visitor parking? 	2014:
<ul style="list-style-type: none"> • Two years ago you/your predecessor said that you thought X needed to be done to address your concerns about X. Has this, or anything else, been done to try and solve this problem in the meantime? If so, how successful do you think this has been? 	2014:

<ul style="list-style-type: none"> • What still needs to be done? 	
<ul style="list-style-type: none"> • Might commuter transport issues affect any of your company's planned re-location or expansion decisions, and if so, how? 	2014:

3. LSTF questions	2014 responses
<ul style="list-style-type: none"> • Do you know anything about the Local Sustainable Transport Fund? <ul style="list-style-type: none"> • If yes: • Do you have any experience of, or views about it? • Do know about any specific measures, and if so, what impact do you believe they have had? • If no: Show a list of local/employer-specific LSTF measures which have taken place, and ask about their knowledge of, and opinions about them. <i>Point out specific measures which have been taken in their area. Also employer grants and road shows they have received.</i> • Do you think measures such as this might have any impact on your business? <i>Specifically in terms of the following:</i> <ul style="list-style-type: none"> (i) Operational transport issues; • (ii) Commuting and staffing issues; and (iii) Productivity? • If little impact, what would help? 	<p><i>If responses have changed since 2014, ask:</i></p> <p>2014:</p>

<ul style="list-style-type: none"> • How would you judge the engagement between your business and your local authority/SusCom/SevernNet on transport issues over the past two years? • What could be improved? <p><i>At an appropriate point in this section, ask interviewee to rate LSTF impacts using Qs 39, 40 and 41 of UoH/Accent Maylands survey (see appendix)</i></p>	
<p>4. Concluding questions</p>	<p>2014</p>
<ul style="list-style-type: none"> • <i>(If not already covered previously):</i> <ul style="list-style-type: none"> • Do you think the transport developments we have discussed today can make a positive contribution to your business? If so, how? If not, why not? • Is there anything you would like to add? • <p>Finally, I'd ask you to consider whether you wish your company to be named or anonymised in the reporting of the research. Please bear in mind that, because of the nature of some of the company-related information collected (e.g. industrial sector, size), companies may be identifiable even if pseudonyms are used. If you are concerned about this, you have the opportunity to read interview transcripts and remove any information which, in hindsight you are not comfortable with being stored and reported.</p> <p>Thank you very much for your helping with our research.</p>	

Q39 new. On a scale of 1 to 5 where 1 = strongly agree and 5 = strongly disagree (and 6 = Don't know), to what extent do you agree or disagree with the following statements regarding the impact of the LSTF in the Bristol North Fringe for your employees?

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
LSTF has increased cycle use by staff						
LSTF has improved bus services						
LSTF has increased public transport use by staff						
LSFT has reduced journey times						

Q40 new. On the same scale to what extent do you agree or disagree with the following statements regarding the impact of the LSTF in the Bristol North Fringe on deliveries and visitors' travel ?

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
LSTF has increased the reliability of deliveries						
LSTF has cut the costs of deliveries						
LSTF has made our site easier to get to and from for visitors						

Q41 new. On the same scale to what extent do you agree or disagree with the following statements regarding the impact of the LSTF in the Bristol North Fringe and the surrounding area on the recruitment and retention of staff?

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
LSTF has made it easier to recruit skilled staff						
LSTF has made it easier to retain skilled staff						

Appendix 5: Travel to work survey (Employee survey), 2014

Travel to Work 2014

South Gloucestershire Council and the University of the West of England (UWE) are working with local employers in the area to reduce traffic congestion and provide better options for employees to travel to and from their places of work. To help us better understand the current situation we would be grateful if you would complete this travel survey.

Your participation is extremely important to us, and your individual response to this survey will be treated in strict confidence. It will support our work with employers in order to make improvements to transportation in the area. If you have any questions about this survey, or to request further copies, please contact rosie.sullivan@southglos.gov.uk More information about the study can be found at www.southglos.gov.uk/traveltowork2014

All respondents have the opportunity to be entered into a prize draw to win one of ten £25 Amazon vouchers.

This survey can also be completed online at: www.southglos.gov.uk/traveltowork

Q1 Which company or organisation do you work for?

Q2 What is your full workplace postcode? (for the workplace location that you most often work from)

Q3 What is your full home postcode?
(This information will only be used for anonymous mapping purposes).

Q4 Which of these best describes your working hours?

- | | |
|---|---|
| <input type="checkbox"/> Standard working hours (e.g. 9am-5pm) | <input type="checkbox"/> Non-guaranteed working hours |
| <input type="checkbox"/> Non-standard working hours (e.g. 2pm-10pm) | <input type="checkbox"/> Shift pattern |
| | <input type="checkbox"/> Other (please specify below) |

Q5 On a typical day what time do you normally arrive at and leave work?
(Please use 24 hour clock e.g. 09:00 or 17:00)

Arrive at work

Leave work

Q6 How long is your typical journey to work in terms of both time and distance?

Journey time in minutes

Journey distance in miles

Q7 Do you have the following?

- | | | |
|--|---|--|
| <input type="checkbox"/> Driving licence | <input type="checkbox"/> Access to a car to get to work | <input type="checkbox"/> Access to a bike to get to work |
|--|---|--|

Your travel to work TODAY

Q8 How did you travel to work TODAY? (Please tick one option)
 If you used more than one form of transport (e.g. walk and bus), please tick which one you used for the longest distance.

<input type="checkbox"/> Car driver (alone)	<input type="checkbox"/> Walk	<input type="checkbox"/> Taxi
<input type="checkbox"/> Car driver (with others)	<input type="checkbox"/> Public bus	<input type="checkbox"/> Work from home
<input type="checkbox"/> Car passenger	<input type="checkbox"/> Employer bus	<input type="checkbox"/> Other (please specify below)
<input type="checkbox"/> Motorbike / Scooter	<input type="checkbox"/> Express coach	
<input type="checkbox"/> Cycle	<input type="checkbox"/> Train	

Q9 If your travel to work TODAY involved more than one form of transport, please indicate which other forms of transport you used. (Please tick all that apply)

<input type="checkbox"/> Car driver (alone)	<input type="checkbox"/> Walk	<input type="checkbox"/> Taxi
<input type="checkbox"/> Car driver (with others)	<input type="checkbox"/> Public bus	<input type="checkbox"/> Work from home
<input type="checkbox"/> Car passenger	<input type="checkbox"/> Employer bus	<input type="checkbox"/> I only used one form of transport to get to work
<input type="checkbox"/> Motorbike / Scooter	<input type="checkbox"/> Express coach	<input type="checkbox"/> Other (please specify below)
<input type="checkbox"/> Cycle	<input type="checkbox"/> Train	

Your travel to work NORMALLY

Q10 How do you NORMALLY travel to work?
 If you normally use more than one form of transport (e.g. walk and bus), please tick which one you use for the longest distance.

<input type="checkbox"/> Car driver (alone)	<input type="checkbox"/> Walk	<input type="checkbox"/> Taxi
<input type="checkbox"/> Car driver (with others)	<input type="checkbox"/> Public bus	<input type="checkbox"/> Work from home
<input type="checkbox"/> Car passenger	<input type="checkbox"/> Employer bus	<input type="checkbox"/> Other (please specify below)
<input type="checkbox"/> Motorbike / Scooter	<input type="checkbox"/> Express coach	
<input type="checkbox"/> Cycle	<input type="checkbox"/> Train	

Q11 If your NORMAL travel to work involves more than one form of transport, please indicate which other forms of transport you normally use. (Please tick all that apply)

<input type="checkbox"/> Car driver (alone)	<input type="checkbox"/> Walk	<input type="checkbox"/> Taxi
<input type="checkbox"/> Car driver (with others)	<input type="checkbox"/> Public bus	<input type="checkbox"/> Work from home
<input type="checkbox"/> Car passenger	<input type="checkbox"/> Employer bus	<input type="checkbox"/> I only used one form of transport to get to work
<input type="checkbox"/> Motorbike / Scooter	<input type="checkbox"/> Express coach	<input type="checkbox"/> Other (please specify below)
<input type="checkbox"/> Cycle	<input type="checkbox"/> Train	

Q19 How long have you worked for your current employer?
 Less than 6 months 1 year up to 2 years 5 years and over
 6 months up to 1 year 2 years up to 5 years

Q20 Do you work full or part time?
 Full time Part time

Q21 What is your work contract?
 Permanent Temporary/Fixed Term

Q22 Which of the following best describes your type of employment?
 Professional/Senior Managerial Unskilled Manual (no qualification/not served on apprenticeship)
 Skilled Manual (with professional qualification/serviced apprenticeship) Junior Management/ Clerical/ Supervisory
 Middle Management

Today's date:

Please tick this box if you wish to be entered into the prize draw to win one of ten £25 Amazon vouchers

I wish to be entered into the prize draw

We would like to invite some respondents to participate in further research about their travel to work. Please tick the box below if you are happy to be contacted by us (there will be no obligation to participate)

I am happy to be contacted about further transport related research

If you have indicated that you wish to be entered into the prize draw or take part in further research, please provide your contact details below.

This information will only be used to contact you if you have won a prize or have been selected to take part in further research.

Your name:

Contact email *(our preferred method of contact):*

Contact phone number:

Data Protection: All personal information you have supplied will be stored on a secure database by the University of the West of England and South Gloucestershire Council, and treated in strict confidence in accordance with the Data Protection Act. It will not be passed onto any third parties and your personal information will not be published.

If you ticked 'yes' to the prize draw, but not the further research, your personal information will only be used for the purpose of the prize draw, and the responses you have given to the survey will not be linked to your details.

Appendix 6: Travel to Work survey (Employee survey), 2016



Travel to Work survey 2016

The four local councils, South Gloucestershire Council, Bristol City Council, Bath & North East Somerset Council and North Somerset Council are working with local employers in the area to reduce traffic congestion and provide better options for employees to travel to and from their places of work.

To help us better understand the current situation we would be grateful if could complete this travel survey.

Your participation is extremely important to us, and your individual response to this survey will be treated in strict confidence. It will support our work with employers in order to make improvements to transportation in the area. If you have any questions about this survey, or to request further copies, please contact consultation@southglos.gov.uk. More information about the study can be found at: www.travelwest.info/traveltowork You can also complete the survey online using this link.

Respondents have the opportunity to be entered into a prize draw to win one of ten £20 shopping vouchers

Where is your workplace based ?

- Bristol South Gloucestershire North Somerset Bath & North East Somerset

Which company or organisation do you work for?

Which site do you work at?

(Please name the site that you most often work from)

What is your full workplace postcode? (for the workplace location that you most often work from)

What is your full home postcode? (This information will only be used for anonymous mapping purposes).

Which of these best describes your current working hours?

- Standard working hours (e.g. 9am-5pm) Non-standard working hours (e.g. 2pm-10pm) Non-guaranteed working hours Other (please specify below)
- Shift pattern

On a typical day what time do you normally arrive at and leave work?

(Please use 24 hour clock e.g. 09:00 or 17:00)

Arrival Time

Leave Time

How long is your typical journey to work in terms of both time and distance?

Journey duration (mins)

Journey distance (miles)

Do you have the following?

- Driving licence Access to a car to get to work Access to a bicycle to get to work

Your journey to work TODAY

How did you travel to work TODAY? (Please tick one option). If you used more than one form of transport (e.g. walk and bus), please tick which one you used for the longest distance.

- | | | |
|---|--|---|
| <input type="checkbox"/> Car driver (alone) | <input type="checkbox"/> Walk | <input type="checkbox"/> Taxi |
| <input type="checkbox"/> Car driver (with others) | <input type="checkbox"/> Public bus | <input type="checkbox"/> Work from home |
| <input type="checkbox"/> Car passenger | <input type="checkbox"/> Employer bus | <input type="checkbox"/> Other (please specify below) |
| <input type="checkbox"/> Motorbike / Scooter | <input type="checkbox"/> Express coach | |
| <input type="checkbox"/> Cycle | <input type="checkbox"/> Train | |

If your journey to work TODAY involved MORE THAN ONE form of transport, please indicate which OTHER forms of transport you used.

- | | | |
|---|--|---|
| <input type="checkbox"/> I only used one form of transport to get to work today | <input type="checkbox"/> Cycle | <input type="checkbox"/> Train |
| <input type="checkbox"/> Car driver (alone) | <input type="checkbox"/> Walk | <input type="checkbox"/> Taxi |
| <input type="checkbox"/> Car driver (with others) | <input type="checkbox"/> Public bus | <input type="checkbox"/> Work from home |
| <input type="checkbox"/> Car passenger | <input type="checkbox"/> Employer bus | <input type="checkbox"/> Other (please specify below) |
| <input type="checkbox"/> Motorbike / Scooter | <input type="checkbox"/> Express coach | |

Your journey to work NORMALLY

How do you NORMALLY travel to work? If you normally use more than one form of transport (e.g. walk and bus), please tick which one you use for the longest distance.

- | | | |
|---|--|---|
| <input type="checkbox"/> Car driver (alone) | <input type="checkbox"/> Walk | <input type="checkbox"/> Taxi |
| <input type="checkbox"/> Car driver (with others) | <input type="checkbox"/> Public bus | <input type="checkbox"/> Work from home |
| <input type="checkbox"/> Car passenger | <input type="checkbox"/> Employer bus | <input type="checkbox"/> Other (please specify below) |
| <input type="checkbox"/> Motorbike / Scooter | <input type="checkbox"/> Express coach | |
| <input type="checkbox"/> Cycle | <input type="checkbox"/> Train | |

If your NORMAL travel to work involves more than one form of transport, please indicate which other forms of transport you normally use.

- | | | |
|---|--|---|
| <input type="checkbox"/> I normally only use one form of transport to get to work | <input type="checkbox"/> Cycle | <input type="checkbox"/> Train |
| <input type="checkbox"/> Car driver (alone) | <input type="checkbox"/> Walk | <input type="checkbox"/> Taxi |
| <input type="checkbox"/> Car driver (with others) | <input type="checkbox"/> Public bus | <input type="checkbox"/> Work from home |
| <input type="checkbox"/> Car passenger | <input type="checkbox"/> Employer bus | <input type="checkbox"/> Other (please specify below) |
| <input type="checkbox"/> Motorbike / Scooter | <input type="checkbox"/> Express coach | |

How satisfied or dissatisfied are you with your journey to work and from work?

	Very satisfied	Quite satisfied	Neither satisfied or dissatisfied	Quite dissatisfied	Very dissatisfied
To work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
From work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Your journey to work TODAY

How did you travel to work TODAY? (Please tick one option). If you used more than one form of transport (e.g. walk and bus), please tick which one you used for the longest distance.

- | | | |
|---|--|---|
| <input type="checkbox"/> Car driver (alone) | <input type="checkbox"/> Walk | <input type="checkbox"/> Taxi |
| <input type="checkbox"/> Car driver (with others) | <input type="checkbox"/> Public bus | <input type="checkbox"/> Work from home |
| <input type="checkbox"/> Car passenger | <input type="checkbox"/> Employer bus | <input type="checkbox"/> Other (please specify below) |
| <input type="checkbox"/> Motorbike / Scooter | <input type="checkbox"/> Express coach | |
| <input type="checkbox"/> Cycle | <input type="checkbox"/> Train | |

If your journey to work TODAY involved MORE THAN ONE form of transport, please indicate which OTHER forms of transport you used.

- | | | |
|---|--|---|
| <input type="checkbox"/> I only used one form of transport to get to work today | <input type="checkbox"/> Cycle | <input type="checkbox"/> Train |
| <input type="checkbox"/> Car driver (alone) | <input type="checkbox"/> Walk | <input type="checkbox"/> Taxi |
| <input type="checkbox"/> Car driver (with others) | <input type="checkbox"/> Public bus | <input type="checkbox"/> Work from home |
| <input type="checkbox"/> Car passenger | <input type="checkbox"/> Employer bus | <input type="checkbox"/> Other (please specify below) |
| <input type="checkbox"/> Motorbike / Scooter | <input type="checkbox"/> Express coach | |

Your journey to work NORMALLY

How do you NORMALLY travel to work? If you normally use more than one form of transport (e.g. walk and bus), please tick which one you use for the longest distance.

- | | | |
|---|--|---|
| <input type="checkbox"/> Car driver (alone) | <input type="checkbox"/> Walk | <input type="checkbox"/> Taxi |
| <input type="checkbox"/> Car driver (with others) | <input type="checkbox"/> Public bus | <input type="checkbox"/> Work from home |
| <input type="checkbox"/> Car passenger | <input type="checkbox"/> Employer bus | <input type="checkbox"/> Other (please specify below) |
| <input type="checkbox"/> Motorbike / Scooter | <input type="checkbox"/> Express coach | |
| <input type="checkbox"/> Cycle | <input type="checkbox"/> Train | |

If your NORMAL travel to work involves more than one form of transport, please indicate which other forms of transport you normally use.

- | | | |
|---|--|---|
| <input type="checkbox"/> I normally only use one form of transport to get to work | <input type="checkbox"/> Cycle | <input type="checkbox"/> Train |
| <input type="checkbox"/> Car driver (alone) | <input type="checkbox"/> Walk | <input type="checkbox"/> Taxi |
| <input type="checkbox"/> Car driver (with others) | <input type="checkbox"/> Public bus | <input type="checkbox"/> Work from home |
| <input type="checkbox"/> Car passenger | <input type="checkbox"/> Employer bus | <input type="checkbox"/> Other (please specify below) |
| <input type="checkbox"/> Motorbike / Scooter | <input type="checkbox"/> Express coach | |

How satisfied or dissatisfied are you with your journey to work and from work?

	Very satisfied	Quite satisfied	Neither satisfied or dissatisfied	Quite dissatisfied	Very dissatisfied
To work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
From work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Compared to 2 years ago, has the amount that you use each of these forms of transport to travel to work changed? (Please tick one box for each form of transport.)

	Use more than 2 years ago	Use less than 2 years ago	Use the same as 2 years ago	Have not used
Car driver (alone)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Car driver (with others)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Car passenger	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Motorbike / Scooter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cycle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public bus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employer bus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Express coach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Train	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Taxi	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work from home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please look at the list of local transport initiatives implemented in the West of England area in recent years. Please indicate whether you were aware of these initiatives or have used them.

	Aware of this	Have used	Was not aware of this
The Big Commuting challenge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TravelWest roadshows	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TravelWest website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TravelWest bus checker app	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
'Dr Bike' cycle repairs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Electric vehicle charging points	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recent improvements to cycle routes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recent improvements in cycle facilities where you work (e.g. bike parking, showers, lockers, bicycle repair kits)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Car share services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kings Ferry commuter coach (North Somerset to Bristol North Fringe)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
X18 bus service (Kingswood to Southmead Hospital)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SevernNet Flyer shuttlebus (Avonmouth)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Car Clubs (e.g. Co-Wheels)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improved signage of cycle/walking routes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Extension of 3 bus service route (Avonmouth)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Overall, how much difference, if any, have these local travel initiatives made to the way you travel to work over the past two years?

- A lot of difference
 A little difference
 No difference
 Don't know

Please use this space to make any other comments about your travel to and from work. Please note that anonymised comments may be shared with the organisations taking part in this survey.

About You

Please answer the following questions about yourself and your employment. Your answers help us to get a better understanding of who uses different forms of transport and why. This information will only be used for analysis purposes and your personal information will not be shared or published.

Gender Female Male Prefer not to say

Age

17 to 20 30 to 39 50 to 59 70 or over
 21 to 29 40 to 49 60 to 69 Prefer not to say

Do you have a disability or mobility issue which affects your transport choices?

Yes No Prefer not to say

How long have you worked for your current employer?

Less than 6 months 1 year up to 2 years 5 years and over
 6 months up to 1 year 2 years up to 5 years

Do you work full or part time?

Full time Part time

What is your work contract?

Permanent Temporary/Fixed Term

Which of the following best describes your type of employment?

Professional/Senior managerial Unskilled manual (no qualifications/not served an apprenticeship)
 Skilled manual (with professional qualifications/served apprenticeship) Junior management/clerical/supervisory
 Middle management

Today's date:

Prize Draw

Please tick this box if you wish to be entered into the prize draw to win one of ten £20 shopping vouchers.

I wish to be entered into the prize draw

If you have indicated that you wish to be entered into the prize draw, please provide your contact details below. This information will only be used to contact you if you have won a prize.

Your name:

Contact email (this is our preferred method of contact):

Contact phone number:

Thank you for your time. Please return this survey to the designated place in your workplace or send it to FREEPOST RTCT-JXLE-EET, South Gloucestershire Council, Travel to Work, Civic Centre, High Street, Kingswood, Bristol, BS15 9TR.

Any personal data you have submitted will be processed and held by South Gloucestershire Council, Bristol City Council, Bath & North East Somerset Council, North Somerset Council, Snap Surveys, University of the West of England, SevernNet and North Bristol SusCom in accordance with the Data Protection Act. Personal information will not be published and will not be passed on to third parties. Anonymous findings and comments may be shared with the funder Department for Transport (LSTF) and the organisations taking part. Anonymised area-wide reports may be shared with the public. If you entered the prize draw, your personal information will only be used for the purpose of the prize draw, and your personal details will not be linked to the responses you have given in the survey.

Appendix 7: Guidance Note for Employee Survey, 2014



University of the
West of England

Travel to Work Employee Survey 2014, 10th – 14th March

Essential Information for Department for Transport Strategic Employment Sites Case Study participants

The Survey

Each Spring South Gloucestershire Council makes the Travel to Work Survey available to all local employers and organisations to record how their staff are travelling to and from work. The survey is an essential tool for accurately measuring commuter travel and satisfaction, and is a key activity within the SES case study. It will be accompanied by a 1 day 'Cordon Count' - a physical vehicle count at site entrances during the week of the survey. Through both these activities we aim to provide an accurate picture of your employees' travel behaviour.

The benefits of this survey for your business are:

- Data on staff travel patterns useful for travel plans & reporting.
- Insight into staff travel issues and opportunities to address them.
- South Gloucestershire Council uses the summary findings to attract new investment for transport in the area.
- UWE will undertake full analysis of the results for incorporation into the wider case study. This will help inform future transport planning and funding decisions, both locally and nationally, and to ensure that the business voice is heard in Department for Transport decision-making.

This year the survey will take 3-4 minutes for your staff to complete. Your organisation will receive a results package specific to your business. The results will also be collated on an area-by-area basis (e.g Emerson's Green), and for the whole South Gloucestershire area.

The survey will take place during the **week commencing 10th March 2014**. We ask you to make the survey available for the whole of the week, but staff need only fill it in once during that week.

The survey will primarily be available through an online link, with paper copies available where necessary. The online link and paper version of the survey will be circulated on the 24th February to allow your business the necessary time to ensure the link is compatible with your IT. Online responses will be automatically collated by the Council. Paper copies will need to be collected and returned to: Rosie Sullivan, ECS, PO Box 299, Strategic Projects, Civic Centre, High Street, BRISTOL, BS15 0DR

Conducting the Survey

The aim of the survey is to obtain accurate results which represent the full workforce, and to do to that it is essential to achieve a high survey response rate - we are aiming for at least 50%. Achieving a high response rate depends on the quality of the survey process. We are happy to work with you on this. The main areas to consider are the following:

1. Promote the survey to ALL staff¹

We realise that trying to reach all staff will raise different issues for different organisations. We would like to have a dialogue with you about how this might work best for you, and how we can assist you. For example:

- who constitutes 'all staff' (e.g. does it include contractors, outsourced services – e.g. cleaning and delivery staff?).
- Are there particular groups who might be especially hard to reach, and how can we try to reach them?
- Are there any issues with, for example, firewalls, which might prevent some staff from accessing the web link?
- How many paper copies are you likely to need? Will you need assistance in distributing and collecting paper copies? If so, how can we help?

Assistance with these issues will be available where needed from South Gloucestershire Council, Bristol City Council & UWE staff.

2. Achieve a high response rate from staff

We will be looking for a response rate of at least 50%, to ensure that the results are as accurate and representative as possible. In the case of some very large organisations we might suggest you circulate the survey to a sample – e.g. a number of randomly selected departments, in order to achieve this. If you have more than 1000 employees, we will discuss this with you.

High response rates are achieved through visible promotion of the survey, ensuring the link is circulated in a way that encourages staff to participate, and ensuring team managers are aware of the survey and support their staff in taking a few minutes to participate.

The Council will provide you with the following materials to help you promote the survey:

- A news story about the impact of previous surveys and transport improvements in the area to circulate 2 weeks in advance.
- Advance announcement text to be circulated 1 week in advance. This will include a web link to a 30 second promotional video. The video presents what the survey helps achieve.
- Announcement text to be circulated on Monday and Wednesday of survey week, containing link to the survey site.
- All participants will be entered into a prize draw for a number of £25 Amazon Vouchers.
- A PDF for a printable poster for noticeboards.
- A Powerpoint slide for digital screens.

3. Promote the survey in a neutral manner

In order to avoid, for example, a disproportionate response from users of certain transport modes, it is important to promote the survey in a neutral fashion -

- i) Please circulate the survey using 'universal' channels of communication. This would ideally be an all staff email; pop-up on all computers and news announcement accessible by all staff.
- ii) Please do not circulate the link through specific email lists such as Bicycle User group

- iii) The Council will provide you with promotional materials to circulate. The promotional materials will be persuasive but neutrally worded so as to encourage all respondents equally, regardless of their travel choices. If you edit or write any additional promotional materials it is important to ensure these are also neutrally worded.
- iv) The support of management is vital to the success of your survey process. An e-mail or letter coming from management instructing employees to fill out the survey can significantly increase participation. We suggest you discuss the survey with managers several weeks in advance and let them know how they can provide support.

4. Timeline for survey week

- Monday 10th March (morning): e-mail announcement, news announcement or pop-up message at login-in, from management, based on text supplied by the Council.
- Wednesday 12th March: send reminder e-mail to all staff with a disclaimer stating, "If you have already filled out the survey, please disregard this notice."
- Throughout the week: Distribute paper survey forms as appropriate. To achieve a high response rate you might consider distributing survey forms to employees in a group setting, such as the canteen at popular break times, or regularly scheduled staff meetings. Provide assistance to staff as appropriate (e.g. non-native English speakers). Encourage staff to complete the survey on the spot and collect them immediately, or clarify where completed forms should be placed.

Cordon Counts

The Council will also conduct a 'Cordon Count' for your site during the week of the survey. Cordon Counts involve enumerators being stationed at the site entrances at the key arrival and departure times, recording which transport modes people are using. To distinguish between pedestrians and those arriving from a nearby public transport stop, the enumerators may need to briefly talk to staff.

In order to arrange for the delivery of the Cordon Count we will need advance notification of the following:

- how many access points your site has
- main arrival time(s)
- any other relevant logistical issues / access issues

Data Protection

All data collected will be treated in strict confidence. Strict ethical guidelines will be adhered to throughout all aspects of the data collection and analysis - particularly in relation to the confidentiality of individuals. Data will be held by South Gloucestershire Council and the University of the West of England in accordance with the Data Protection Act, and will not be passed onto any third parties.

If participants choose to supply their name and contact details for the prize draw, and/or to participate in further research, this information will be removed from files containing survey data, and stored securely by the University of the West of England only (after the prize draw, South Gloucestershire Council will delete any personal data from their records). At UWE, each respondent will be given an ID number. A separate file linking individuals to ID numbers will be kept on a secure part of the UWE system, and password-protected.

Appendix 8: Guidance Note for Employee Survey, 2016



Travel to Work Employee Survey 2016, 7th – 13th March 2016 Essential Information for participating organisations

The Survey

Each year Bristol City Council and South Gloucestershire Council invite local businesses and organisations to take part in the Travel to Work Survey to record how their staff are travelling to work. This year the two councils have joined forces with Bath & North East Somerset and North Somerset Councils to get a better insight into Travel to Work across the West of England area. The survey is an essential tool for accurately measuring commuter travel and satisfaction. The benefits of this survey for your business are:

- A record of how your staff travel to work – useful for travel plans & reporting.
- Insight into staff travel issues and opportunities to address them.
- A year on year comparison of your company travel trends.
- The West of England Unitary Authorities use the summary findings to attract new investment for transport in the area. It also helps target new spending on infrastructure and new public transport services.

This year the survey will take approximately 3-4 minutes for your staff to complete. Your organisation will receive results specific to your business if we receive responses from 30+ of your staff. Results will also be collated on a Unitary Authority basis and West of England wide basis.

The survey will take place during the week commencing 7th March 2016. We ask you to make the survey available for the whole of the week, but staff need only fill it in once during that week.

The survey will primarily be available through an online link, with pdfs for printing or paper copies available if needed. You will need to register your organisation to take part by filling in our online registration form at <http://bit.ly/TravelToWorkSurvey2016Registration> by **Monday 22nd February**. The online link and paper version of the survey will then be circulated to you on or just after **22nd February 2016** to allow your business the necessary time to ensure the link is compatible with your company IT systems. Any paper copies will need to be collected and returned by **18th March 2016** to: FREEPOST Plus RTCT-JXLE-EET, South Gloucestershire Council, Travel to Work survey, Corporate Research & Consultation, Civic Centre, High Street, Kingswood, Bristol, BS15 9TR.

Conducting the Survey

The aim of the survey is to obtain accurate results, which represent the full workforce, and to do to that it is essential to achieve a high survey response rate. Achieving a high response rate depends on the quality of the survey process. The main areas to consider are the following:

1. Promote the survey to ALL staff

We realise that trying to reach all staff will raise different issues for different organisations. We are able to provide you with free promotional material and advise you on how to best reach your staff. For example:

- Who constitutes 'all staff' (e.g. does it include contractors, outsourced services, cleaning and delivery staff?).
- Are there particular groups who might be especially hard to reach? If so, is there a way we can help you reach them?
- Are there any issues with, for example, firewalls, which might prevent some staff from accessing the web link?
- How many paper copies are you likely to need?

2. Achieve a high response rate from staff

We will be looking for a high response to ensure that the results are as accurate and representative as possible.

High response rates are achieved through visible promotion of the survey, ensuring the link is circulated in a way that encourages staff to participate, and ensuring team managers are aware of the survey and support their staff in taking a few minutes to participate.

We can provide you with the following materials to help you promote the survey:

- A news story about the impact of previous surveys and transport improvements in the area to circulate in advance.
- Advance announcement text to be circulated the week before the survey. This will also include a web link to a 30 second promotional video. The video presents what the survey helps achieve.
- Announcement text to be circulated on Monday and Wednesday of survey week, containing the link to the survey site.
- All participants can be entered into a prize draw for a number of £25 shopping vouchers.
- A PDF for a printable poster for noticeboards.
- A Powerpoint slide for digital screens.

3. Promote the survey in a neutral manner

In order to avoid, for example, a disproportionate response from users of certain transport modes, it is important to promote the survey in a neutral fashion -

- i) Please circulate the survey using 'universal' channels of communication. This would ideally be an all staff email; pop-up on all computers or news announcement accessible by all staff.
- ii) Please do not circulate the link through specific email lists such as Bicycle User group
- iii) The Council will provide you with promotional materials to circulate. The promotional materials will be persuasive but neutrally worded so as to encourage all respondents equally, regardless of their travel choices. If you edit or write any additional promotional materials it is important to ensure these are also neutrally worded.
- iv) The support of management is vital to the success of your survey process. An e-mail or letter coming from management instructing employees to fill out the survey can significantly increase participation. We suggest you discuss the survey with managers in advance and let them know how they can provide support.

4. *Timeline for survey week*

- **Monday 7th March** (morning): e-mail announcement, news announcement or pop-up message at log-in based on text supplied by the Councils.
- **Wednesday 9th March**: send reminder e-mail to all staff with a disclaimer stating, "If you have already filled out the survey, please disregard this notice."
- **Throughout the week**: Distribute paper survey forms as appropriate. To achieve a high response rate you might consider distributing survey forms to employees in a group setting, such as the canteen at popular break times, or regularly scheduled staff meetings. Provide assistance to staff as appropriate (e.g. non-native English speakers). Encourage staff to complete the survey on the spot and collect them immediately, or clarify where completed forms should be placed.

Data Protection

Any personal data will be processed and held by South Gloucestershire Council, Bristol City Council, North Somerset Council, Bath & North East Somerset Council, Snap Surveys Ltd and North Bristol SusCom in accordance with the Data Protection Act. Personal information will not be published and will not be passed on to third parties. Anonymous findings and comments may be shared with the funder (LSTF), the University of the West of England, and participating organisations. Anonymous area-wide reports may be shared with the public.

If participants choose to supply their name and contact details for the prize draw this information will be stored securely and will not be linked to their survey data. After the prize draw, any personal data will be deleted.

Further information

If you have any questions, please contact:

For Bath & North East Somerset organisations: Katherine Lee, katherine_lee@bathnes.gov.uk, 01225 477315

For Bristol organisations: Kurt Scheibl, kurt.scheibl@bristol.gov.uk, 0117 903 6847

For North Somerset organisations: Gideon Thomas, gideon.thomas@n-somerset.gov.uk, 01275 888281

For South Gloucestershire organisations: Richard Drew, richard.drew@southglos.gov.uk, 01454 865 857



Travelwest

The four councils comprising the West of England (B&NE Somerset, Bristol, North Somerset & South Gloucestershire) have received funding from the Department for Transport from the Local Sustainable Transport Fund (LSTF) to promote sustainable transport initiatives across the region. Travelwest.info is the travel website developed to promote these initiatives and to provide information to enable people to make choices about travel options for their journeys; and the travelwest brand is used on all projects which are funded from the LSTF scheme.

Appendix 9: Comparison of mode share results from surveys and cordon counts, 2014

West of England Comparison of Cordon Count and Employee Survey Mode Share Results (%) – Portside, 2014

Employment Site Portside	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey ¹	Total staff
	Car alone (%)		Car share (%)		Cycle (%)		Walk (%)		Bus (%)		Rail (%)		Motorcycle (%)		Other (%)		N	N	N
Skincare products company	67.3	69.6	20.4	21.4	4.1	5.4	2.0	0.0	0.0	0.0	0.0	1.8	0.0	1.8	6.1	0.0	49	56	73
Aerospace manufacturer 2	87.0	83.8	0.0	9.1	4.3	5.1	0.0	0.0	0.0	0.0	1.4	1.0	1.4	1.0	5.8	0.0	69	99	370
Catering products company	60.6	59.0	25.5	25.0	6.0	6.5	1.4	4.5	1.7	1.4	1.9	2.2	0.5	0.8	2.4	0.6	419	356	800
Mail company	79.4	67.1	5.9	24.3	5.9	5.7	0.0	0.0	0.0	0.0	0.0	1.4	5.9	1.4	2.9	0.0	34	70	200
Power station	90.3	64.5	6.5	25.8	3.2	9.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	31	31	55
Waste recycling company 1	67.9	87.5	10.7	6.3	0.0	0.0	0.0	0.0	21.4	0.0	0.0	0.0	0.0	6.3	0.0	0.0	28	16	65
Bioscience manufacturer	73.5	76.9	17.6	12.8	8.8	5.1	0.0	0.0	0.0	2.6	0.0	2.6	0.0	0.0	0.0	0.0	34	39	55
Candle products company	86.0	66.0	12.9	24.5	0.0	3.8	0.0	0.0	0.0	0.0	1.1	1.9	0.0	1.9	0.0	1.9	93	106	180
Total Portside	69.5	66.4	18.8	21.6	4.8	5.7	0.9	2.1	1.7	0.8	1.3	1.8	0.7	1.2	2.4	0.5	757	773	1798

¹ Excluding working from home (113 (1.3%) in North Fringe and 2 (0.2%) in Portside)

West of England Comparison of Cordon Count and Employee Survey Mode Share Results (%) – North Fringe, 2014

Employment Site	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey ²	Total staff
North Fringe	Car alone (%)		Car share (%)		Cycle (%)		Walk (%)		Bus (%)		Rail (%)		Motorcycle (%)		Other (%)		N	N	N
Aerospace manufacturer 1	52.7	49.3	12.9	14.0	8.5	18.6	15.0	7.5	6.0	4.8	0.1	1.5	1.9	3.1	2.9	1.4	1291	1031	4000
Engineering consultancy 1	60.5	43.1	7.2	16.1	9.6	16.1	5.4	4.4	13.0	15.7	0.0	2.4	1.0	1.3	3.2	0.9	499	459	1050
Engineering consultancy 2	55.1	50.9	22.7	29.0	4.0	8.3	11.7	2.4	2.8	5.3	0.4	1.2	0.8	2.4	2.4	0.6	247	169	400
Science Park	60.0	65.2	19.3	10.6	7.3	13.6	2.0	1.5	7.3	4.5	0.7	1.5	2.7	3.0	0.7	0.0	150	66	200
Technology consultancy	78.6	68.3	4.8	14.6	7.1	7.3	0.0	2.4	0.0	1.2	0.0	2.4	1.2	3.7	8.3	0.0	84	82	200
Financial services company	55.3	54.8	9.9	12.7	3.7	8.8	14.0	7.1	7.4	7.9	8.8	6.9	0.5	1.1	0.4	0.6	1963	897	3000
Technology Company 1	59.8	48.0	8.7	9.4	16.6	24.2	6.4	5.4	2.6	4.9	2.3	2.2	0.9	2.7	2.6	3.1	343	223	800
Construction company	91.2	85.6	0.0	10.0	0.0	1.1	1.8	0.0	1.8	0.0	2.6	1.1	1.8	2.2	0.9	0.0	114	90	300
Energy technology company	63.5	58.3	23.1	12.5	7.7	20.8	0.0	0.0	1.9	2.1	0.0	0.0	3.8	4.2	0.0	2.1	52	48	70
Large public sector employer ³	38.8	47.1	14.7	20.9	8.4	8.9	10.4	6.1	2.5	3.1	20.3	11.5	1.7	1.5	3.1	1.0	4882	2618	10000
Technology Company 2	77.6	69.6	1.5	6.1	7.5	12.2	7.5	4.3	5.2	6.1	0.0	1.7	0.7	0.0	0.0	0.0	134	115	205
Total North Fringe	48.5	50.2	12.8	17.1	7.5	11.8	11.0	5.9	4.6	5.3	12.0	6.9	1.3	1.8	2.4	1.0	9808	5798	20025

² Excluding working from home (115 (1.3%) in North Fringe and 2 (0.2%) in Portside)

³ An estimate based on security cameras is that 6776 people were on site on day of count. It is thought that a large number of people arrived by car before 07:15

Appendix 10: Comparison of mode share results from surveys and cordon counts, 2016

West of England Comparison of Cordon Count and Employee Survey Mode Share Results (%) – Portside, 2016

Employment Site Portside	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey ⁴	Total staff
	Car alone (%)		Car share (%)		Cycle (%)		Walk (%)		Bus (%)		Rail (%)		Motorcycle (%)		Other (%)		N	N	N
Skincare products company	80.4	79.3	0.0	13.8	0.0	0.0	0.0	0.0	15.2	3.4	4.3	3.4	0.0	0.0	0.0	0.0	46	29	87
Waste recycling company 2	75.8	71.4	19.4	11.4	4.8	2.9	0.0	0.0	0.0	0.0	0.0	5.7	0.0	0.0	0.0	8.6	62	35	69
Aerospace manufacturer 2	98.0	87.6	0.0	5.6	2.0	2.2	0.0	0.0	0.0	0.0	0.0	2.2	0.0	2.2	0.0	0.0	50	89	470
Catering products company	72.6	61.9	18.3	23.2	1.1	3.9	2.3	3.0	3.0	3.3	0.9	4.2	0.5	0.3	1.2	0.3	563	336	865
Power station	63.1	74.1	34.0	18.5	1.0	7.4	1.0	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	103	27	56
Waste recycling company 1	84.6	85.7	7.7	0.0	0.0	14.3	0.0	0.0	7.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	26	7	75
Bioscience manufacturer	57.8	75.0	4.4	0.0	13.3	0.0	4.4	12.5	15.6	0.0	4.4	12.5	0.0	0.0	0.0	0.0	45	16	55
Total Portside	73.2	69.0	17.2	17.8	1.9	3.5	1.8	2.2	3.8	2.2	1.0	3.9	0.3	0.6	0.8	0.7	895	539	1677

⁴ Excluding working from home (63 (1.2%) in North Fringe and 0 (0.0%) in Portside)

West of England Comparison of Cordon Count and Employee Survey Mode Share Results (%) – North Fringe, 2016

Employment Site North Fringe	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey	Cordon	Survey ⁵	Total staff
	Car alone (%)		Car share (%)		Cycle (%)		Walk (%)		Bus (%)		Rail (%)		Motorcycle (%)		Other (%)		N	N	N
Aerospace manufacturer 1	65.7	51.4	7.4	11.0	11.6	20.6	7.5	7.7	3.8	4.2	0.3	1.0	2.1	2.9	1.5	1.2	2418	519	3018
Business Park	66.5	66.4	6.0	9.0	10.6	12.6	7.5	3.3	2.1	1.7	0.4	2.3	2.0	3.3	4.9	1.3	762	301	1145
Engineering consultancy 1	35.9	51.1	17.0	14.1	6.1	12.9	12.2	2.9	20.1	15.8	1.8	1.3	1.0	1.3	4.6	0.6	393	311	1050
Engineering consultancy 2	61.9	51.4	18.0	25.7	1.7	13.3	1.7	13.3	5.4	3.8	0.8	0.0	0.8	2.9	3.3	0.0	239	105	400
Science Park	78.6	65.6	4.1	6.6	9.2	16.4	5.1	1.6	1.0	9.8	0.0	0.0	0.0	0.0	1.0	0.0	98	61	366
Technology consultancy	76.7	81.3	14.0	0.0	2.3	12.5	4.7	0.0	0.0	0.0	0.0	0.0	1.2	0.0	2.3	6.3	43	16	49
Financial services company	59.5	58.6	11.4	9.3	5.3	11.0	8.3	6.0	4.0	6.1	0.1	7.7	0.5	1.0	0.5	1.0	1784	621	2374
Technology Company 1	62.9	48.4	2.9	9.5	16.0	23.7	5.8	6.3	2.2	4.7	3.3	3.7	0.9	3.7	3.3	0.0	275	190	750
Construction company	85.9	85.1	5.1	0.0	0.0	4.3	2.6	4.3	0.0	0.0	3.8	4.3	1.8	0.0	0.0	2.1	78	47	300
Large public sector employer	44.7	41.1	10.8	22.4	9.0	8.4	9.0	7.0	2.6	4.4	19.4	14.7	1.7	1.6	3.3	0.3	5358	795	9846
Environmental Compliance co.	75.0	75.0	8.3	14.3	4.2	7.1	0.0	0.0	12.5	3.6	0.0	0.0	0.0	0.0	0.0	0.0	24	28	28
Total North Fringe	54.1	49.6	9.9	12.4	8.9	14.4	8.4	7.6	3.7	8.8	11.0	4.4	1.3	2.1	2.6	0.7	11472	5241	19326

⁵ Excluding working from home (63 (1.2%) in North Fringe and 0 (0.0%) in Portside)

Appendix 11: West of England Bus Passenger Satisfaction survey

This survey is asking you some questions about your journey on this bus today and your day-to-day travel more generally. Your answers are important in helping to improve local services. Thank you for your time.

1 Where are you travelling from and to? Please write in the stop names

FROM: TO:

2 What is the main purpose of your journey today? Please tick one box

Business	<input type="checkbox"/>	Commuting	<input type="checkbox"/>	Leisure	<input type="checkbox"/>	Other: <input type="text"/>
Education	<input type="checkbox"/>	Shopping	<input type="checkbox"/>	Health/Medical	<input type="checkbox"/>	

If you are travelling to or from work, what is the name of your Employer?

3 If you are travelling to work, how long have you worked for your current employer? Please tick one box

Less than 6 months	<input type="checkbox"/>	6 months up to 1 year	<input type="checkbox"/>	1 year up to 2 years	<input type="checkbox"/>
2 years up to 5 years	<input type="checkbox"/>	5 years and over	<input type="checkbox"/>		

4 How often do you use this bus service? Please tick one box

Almost every day	<input type="checkbox"/>	At least once a week	<input type="checkbox"/>	About 1-3 times a month	<input type="checkbox"/>
Within the last 6	<input type="checkbox"/>	Less often	<input type="checkbox"/>		

5 How satisfied are you with this service?

Please rate each one from 5 (*high satisfaction*) to 1 (*low satisfaction*)

a) Overall standard of the bus service	<input type="checkbox"/>	g) The way the bus is driven	<input type="checkbox"/>
b) Punctuality of buses	<input type="checkbox"/>	h) Comfort and cleanliness of the bus	<input type="checkbox"/>
c) Frequency of buses	<input type="checkbox"/>	i) How easy buses are to get on and off	<input type="checkbox"/>
d) Value for money of the journey	<input type="checkbox"/>	j) Quality of the bus stops and shelters	<input type="checkbox"/>
e) Journey time to your destination	<input type="checkbox"/>	k) Availability of timetable/route information	<input type="checkbox"/>
f) Route the bus takes	<input type="checkbox"/>	l) Seat availability/over-crowding	<input type="checkbox"/>

6 How did you hear about the new X18 service? Please tick all that apply

Operator website	<input type="checkbox"/>	Council	<input type="checkbox"/>	Radio	<input type="checkbox"/>	Bus stop	<input type="checkbox"/>	Newspape	<input type="checkbox"/>	Other:
Home email	<input type="checkbox"/>	Work email	<input type="checkbox"/>	Poster	<input type="checkbox"/>	Timetabl	<input type="checkbox"/>	Roadshow	<input type="checkbox"/>	
Facebook/Twitter	<input type="checkbox"/>									

7 How were you making your journey before the introduction of the X18 service? Please tick one box

Didn't make this journey	<input type="checkbox"/>	Car	<input type="checkbox"/>	Walk	<input type="checkbox"/>	Other:
Car share	<input type="checkbox"/>	Other	<input type="checkbox"/>	Cycle	<input type="checkbox"/>	

8 Has the availability of Real Time Information (RTI) encouraged you to use buses more frequently? Please tick one box

Yes No

9 If resources were available, what improvements would you most like to see made to the RTI system?

Please rank the following in order of preference (4 = most important – 1 = least important)

More bus services equipped with RTI	<input type="checkbox"/>	More RTI displays at bus stops	<input type="checkbox"/>
Improved access to RTI through website	<input type="checkbox"/>	Improved access to RTI through mobile phone	<input type="checkbox"/>

10 Do you have an older person's concessionary pass? Please tick one box

Yes No

11 What type of ticket are you using for this journey? Please tick one box

Single	<input type="checkbox"/>	First Week	<input type="checkbox"/>	First Month	<input type="checkbox"/>	Concession	<input type="checkbox"/>	Other:
Return	<input type="checkbox"/>	First Ten	<input type="checkbox"/>	First Year	<input type="checkbox"/>			

12 Could you have used a car for this journey today? Please tick one box

Yes No

13 Are you: *Please tick one box*

Male

Female

14 Please write your age in the box below

15 Do you have a disability? *Please tick one box*

Yes

No

16 Please write your home postcode into the box below. *(This information is used anonymously to understand area-wide journeys, and will not be used to identify or contact you in any way).*

If you have any other thoughts or comments about this service, please write them in the box below.

Thank you for your time. Please hand your form back as you alight.

Appendix 12: Report of West of England Bus User Surveys

1.1 Background

Bus user surveys have been conducted in March 2014 and March 2015 on LSTF-funded bus and coach services serving the North Fringe employment area in the West of England. The surveys were aimed at understanding if the new bus services have attracted car commuters and how satisfied users are with the services. This report presents the findings from both surveys with an analysis of the ways in which the user profiles and levels of satisfaction with services have changed over the one year period.

Service context

There are two relevant services which have been introduced to provide enhanced public transport access to the North Fringe employment area in the West of England.

X18 Express Commuter Bus Service

The X18 is an express commuter bus service which was introduced in December 2012 and is operated by FirstGroup. The X18 service links residential areas in the east of Bristol with large employer sites in the North Fringe of Bristol. A service diagram of the X18 route is included below.

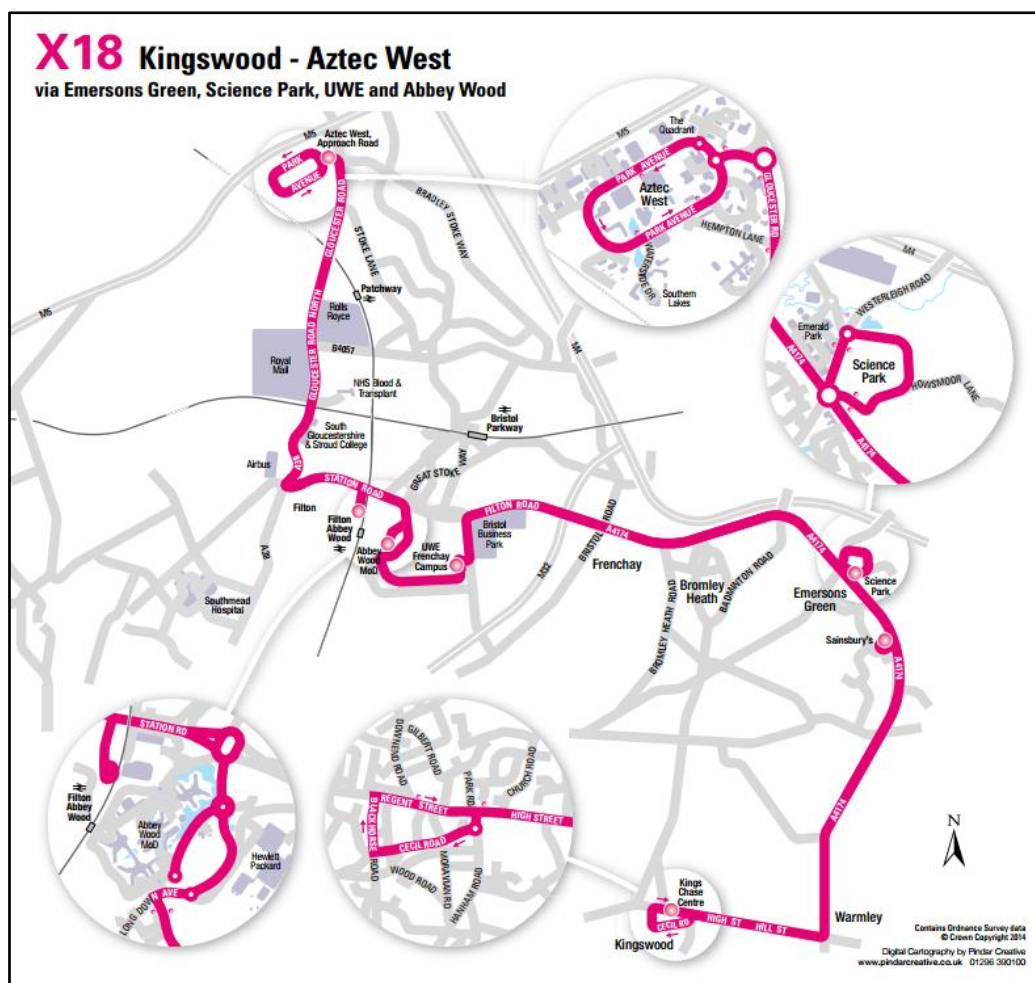


Figure 1 - X18 service diagram. Available from: http://www.firstgroup.com/uploads/maps/X18_Leaflet_WEB.pdf

The X18 service operates four services in both the morning and afternoon peaks inbound from Kingswood/Emersons Green to the North Fringe, and four services in both the morning and afternoon peak outbound from the North Fringe to Kingswood/Emersons Green. The inbound morning peak services operate at 06:00, 06:50, 07:20, and 07:20, whilst the outbound services run at 06:55, 07:50, 08:30, and 09:00. The inbound afternoon peak services run at 15:25, 15:55, 16:40, and 17:40; the outbound afternoon peak services run at 15:35, 16:35, 17:05, and 17:45.

It should be noted that levels of service on the X18 have been reduced since the time of the 2014 survey. At that time, the X18 service operated five services in the morning peak and five services in the afternoon peak inbound from Kingswood/Emersons Green to the North Fringe, and six services in the morning peak and five services in the afternoon peak outbound from the North Fringe to Kingswood/Emersons Green. Therefore there has been a reduction of 1-2 services in each peak period, and this should be taken into consideration when assessing the findings related to satisfaction, which are presented later in this report.

Since its introduction the X18 service has experienced a relatively steady growth in patronage, shown in Chart 1.

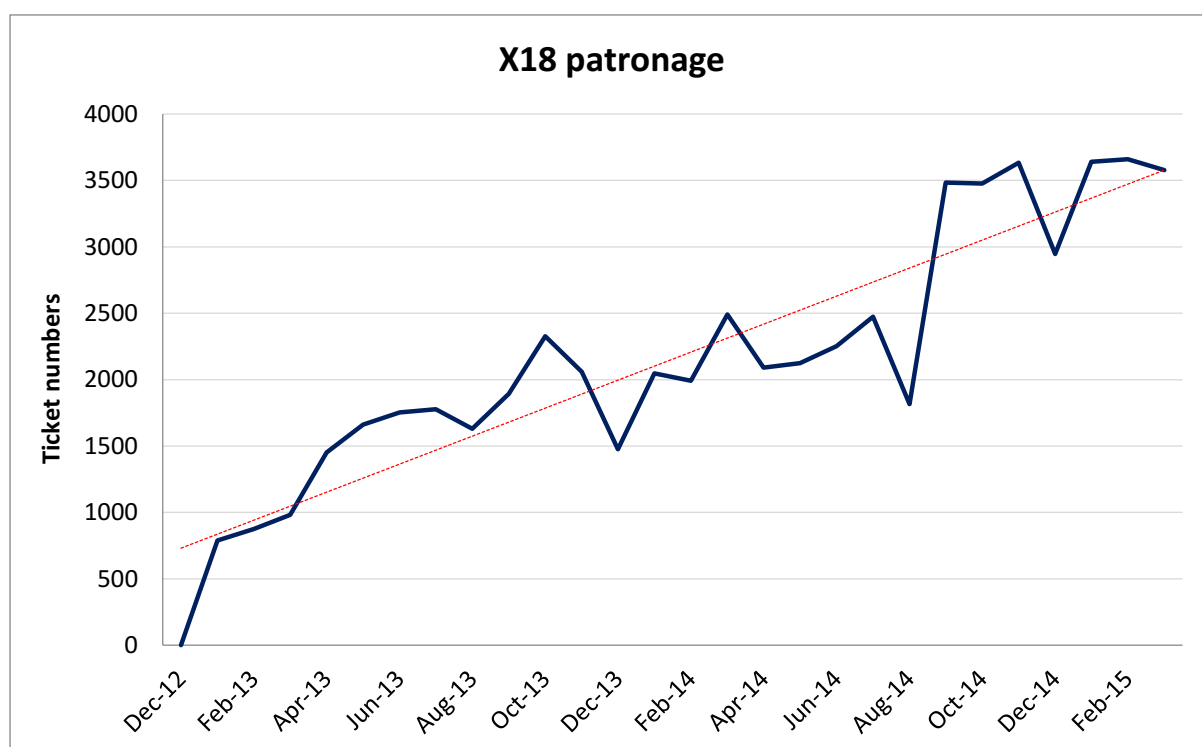


Chart 1 - X18 monthly patronage data

The service is designed to give a ‘premium’ bus experience for commuters, and there is a focus on providing a desirable on-board environment. Buses running on the X18 route are equipped with free Wi-Fi, on-board screens displaying next-stop announcements and BBC news, and comfortable seating with extended space. The aim of this approach is to provide a travel experience which will encourage commuters out of their cars and on to public transport for their journeys to and from work.

Kings Ferry North Bristol Commuter Coach Service

The North Bristol commuter coach service was introduced in November 2013 and is operated by Kings Ferry. The service links the towns of Portishead and Weston-Super-Mare to the major

employer sites in the North Fringe of Bristol. The service runs in the morning and afternoon peak times, and travels only inbound in the morning peak, and only outbound in the afternoon peak. The Kings Ferry service operates four services in the morning peak inbound from Weston-Super Mare to the North Fringe (06:15, 06:45, 07:15, 08:15), and then five return services in the afternoon (13:00, 16:00, 17:05, 17:50, 18:20). It operates four services in the morning peak inbound from Portishead to the North Fringe (06:40, 07:40, 08:25, 09:05), and then five return services in the afternoon peak (13:00, 15:50, 16:35, 17:15, 18:30). It should be noted that the two 13:00 return services have been newly introduced since the time of the 2014 SES report. A service diagram of the Kings Ferry routes is included below.

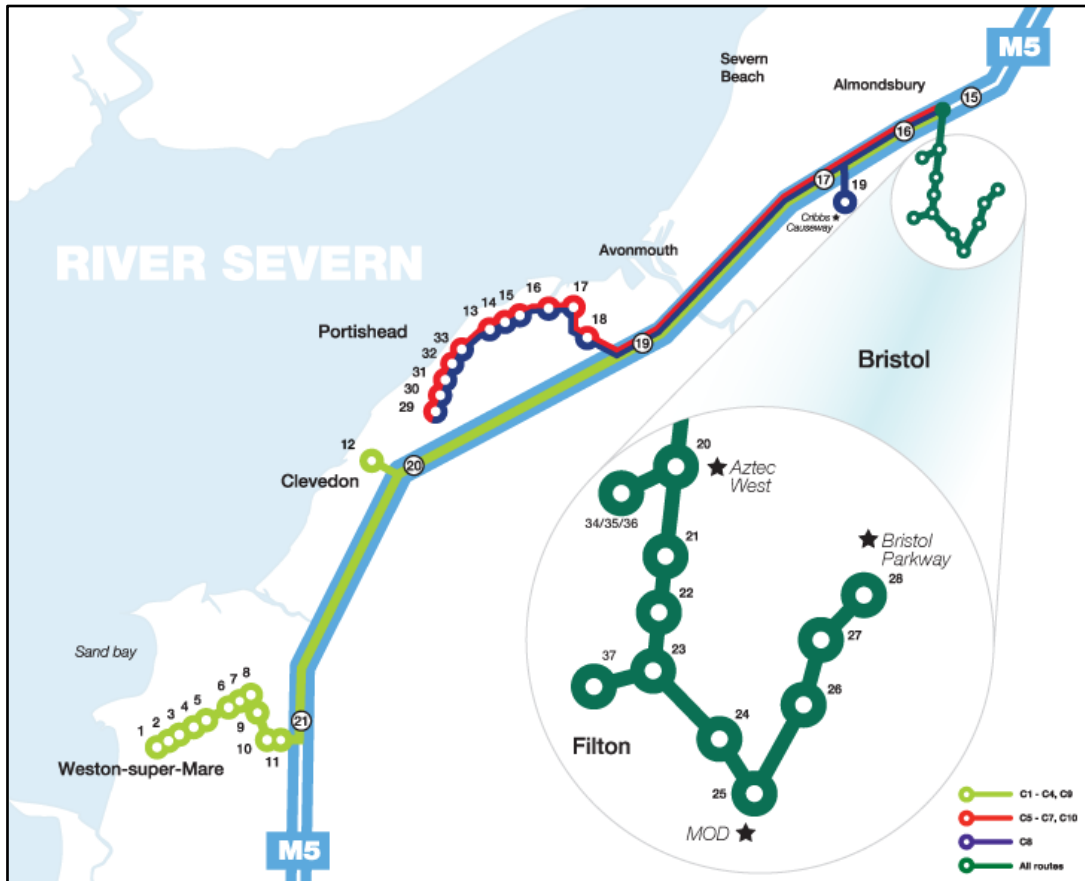


Figure 2 - Kings Ferry service diagram. Available from: www.thekingsferry.co.uk/north-bristol/route-map

Patronage data for the Kings Ferry is shown in Chart 2.

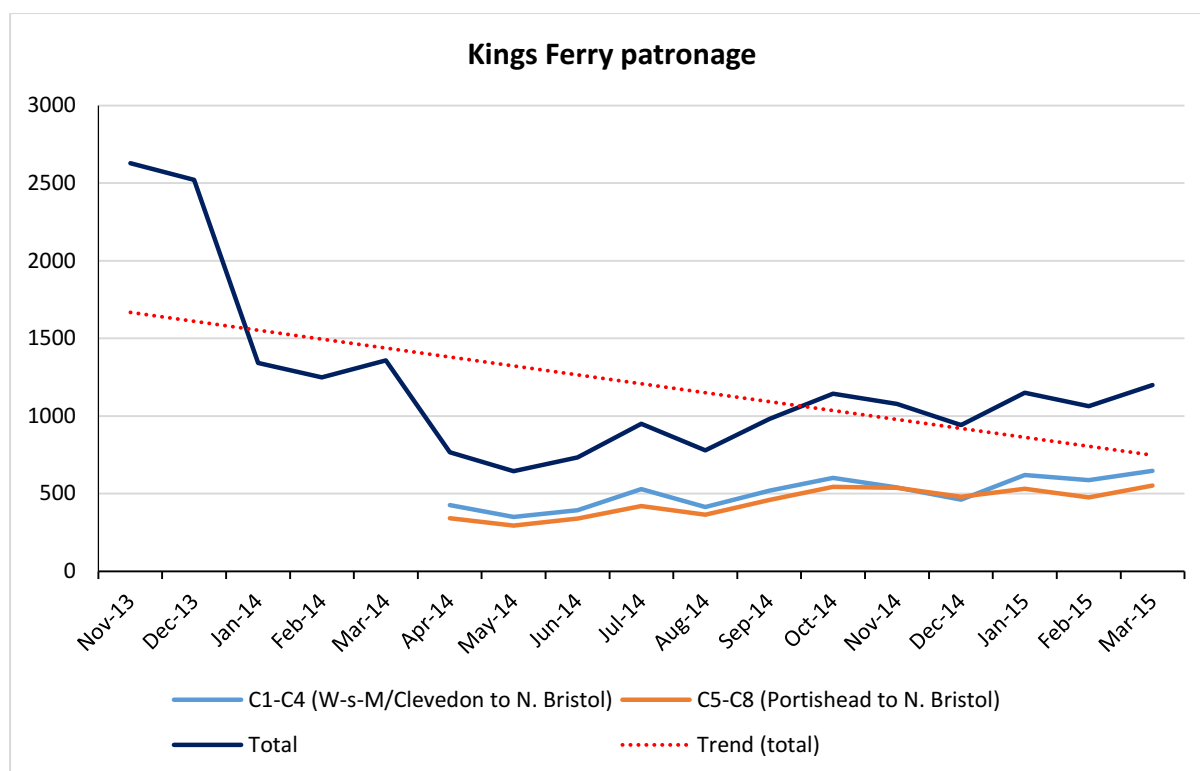


Chart 2 – Kings Ferry monthly patronage data

It should be noted that as a part of the launch of the service, free fares were offered for the first two months of operation (November and December 2013). The data suggest that this offer was responsible for attracting particularly high levels of use during the first two months, followed by a drop in patronage when fares were introduced. Patronage dropped to a low in April 2014, and since then has been on the increase.

The Kings Ferry service also aims to offer a premium service with the rationale that the desirable (or ‘executive’) travel experience offered on Kings Ferry coaches can attract commuters away from their cars. The Kings Ferry service offers an extended range of facilities on-board, including free Wi-Fi, reclining seats, air conditioning, refreshments, and toilets.

Table 12 (subsequently) provides some insight into whether the services have continued to attract new passengers, or whether they are increasingly serving a loyal passenger base. It is evident that the patterns of uptake on both services are similar, with the majority of passengers having started using the services in 2014, when they had been operational for some time and had become more established and visible. The data for 2015 demonstrates that the services are continuing to attract new passengers, with this data representing just the first quarter of 2015.

1.2 Survey Methodology

Bus user surveys were conducted on-board X18 and Kings Ferry services with the aim of achieving high response rates from existing users. The survey followed a dual administration method, utilising both a self-completion and a face-to-face interview approach. All passengers on the surveyed services were approached and asked to participate in the self-completion survey, which was designed to take approximately five minutes to complete. Ample time was given for passengers to complete the survey as journey times between residential areas and employment areas are at least 15 minutes. Whilst the self-completion surveying was the primary method of data collection, it was understood that some passengers might not be able to complete a survey themselves during the

journey. In these instances, the surveyors would make a note of the individual and ask them if they would be willing to take part in a face-to-face interview, in which case the surveyor asked the questions and completed the form on behalf of the passenger. If the passenger agreed, the surveyor would return to them – *after having handing out the remaining survey forms to other passengers.*

Research Design

The questionnaire forms used for the X18 and Kings Ferry user surveys are available as separate attachments to this document.

The four unitary authorities (UAs) in the West of England each have existing bus user satisfaction surveys which they run periodically on a range of different services, with the aim of monitoring levels of satisfaction on services as a part of the Greater Bristol Bus Network (GBBN). It was decided to use an updated version of the survey forms already in use. The survey forms used by the UAs are similar and based on a common set of core questions; however there was a need to consolidate the design of the survey forms further, to ensure that comparability is possible. The new survey forms were developed along four principles:

- 1) The forms should maintain the main questions from the existing GBBN satisfaction survey forms to allow the UAs to continue to compile time-series data on their services.
- 2) The forms should be re-designed as self-completion surveys (previously the UAs had been exclusively using a face-to-face interview approach) to ensure maximum response rates.
- 3) The forms should all contain a core set of questions which will be included in all West of England LSTF bus user satisfaction surveys. This will allow for the data from the numerous smaller surveys to be compiled into one dataset to examine levels of satisfaction at the sub-regional level across all West of England LSTF funded services.
- 4) The forms should also contain the option for bespoke questions relevant to different individual services, which will allow for an analysis of service-specific issues.

Through following this design it has been possible to collect data which can be analysed at both the sub-regional and individual service levels, and also which can be compared to previous baseline data on levels of passenger satisfaction.

Conduct

The X18 satisfaction surveys were conducted over two day periods in both March of 2014 and 2015, with all services in the morning peak surveyed on the first day, and services in the afternoon peak surveyed on the second day. The 2015 X18 survey collected 94 valid responses (124 valid responses were obtained in 2014.)

The Kings Ferry satisfaction survey was conducted on a single day in both March of 2014 and 2015, on all of the services in the morning peak. 54 Kings Ferry passengers participated in the 2015 survey (the figure was 36 in 2014).

1.3 Results

The results are presented differently dependent upon the questions being reported. For the more general sample characteristics, the data from all passengers are included. This is intended to give an overview of the passenger make-up of the services and to understand their use by commuters within the wider context of all users. Following the data for journey purpose, only the data collected

from passengers travelling on commuting journeys to the North Fringe are included. This is to allow for a specific analysis of those passengers using the services to access the North Fringe for employment. In order to create this specific subset, passengers were selected based upon them being on either a morning peak inbound commuting journey, or an evening peak outbound commuting journey.

Gender

Table 1 – Gender of survey respondents

All			X18			Kings Ferry		
Gender	N	%	Gender	N	%	Gender	N	%
<i>2014</i>								
Male	69	54.3	Male	44	48.4	Male	25	69.4
Female	58	45.7	Female	47	51.6	Female	11	30.6
Total	127		Total	91		Total	36	
<i>2015</i>								
Male	87	60.0	Male	47	51.6	Male	40	74.1
Female	58	40.0	Female	44	48.4	Female	14	25.9
Total	145		Total	91		Total	54	

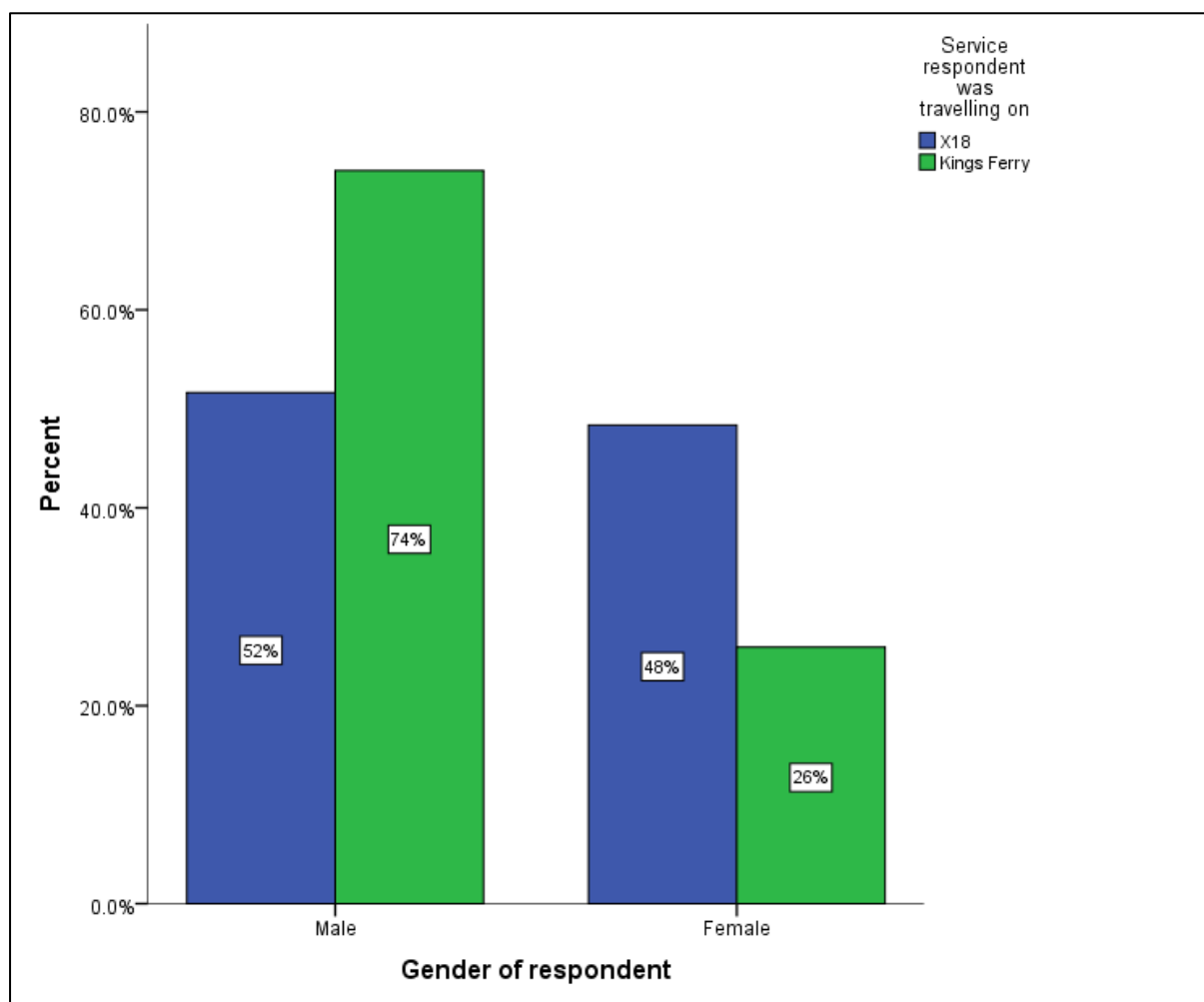


Chart 3 - Gender of survey respondents – 2015 survey

In the 2015 survey there was a higher proportion of men travelling compared to women. In total, 87 men were surveyed in comparison to 58 women. It is evident that the majority of this imbalance is accounted for by the strong gender disparity on the Kings Ferry service, where 40 men (71%) were surveyed in comparison to just 14 women (26%). On the X18 the gender split is more even, with 47 men surveyed (52%) in comparison to 44 women (48%).

In comparison with the previous year's results, the gender gap has widened. In 2014 at the aggregate level there were still slightly more men travelling than women – with 69 men travelling compared to 58 women – however there has been a shift of +5.7 percentage points for men compared to women. Again, when the services are examined in isolation it is clear that this result is largely produced by widening of the gender disparity on the Kings Ferry service – on which 25 men (69%) were travelling in comparison to 11 women (31%) in 2014. This represents a shift of +4.7 percentage points towards men. The gender ratio on the X18 has remained relatively even, although has moved slightly more towards a higher proportion of men compared to 2014.

The results suggest that the Kings Ferry service is particularly attractive to male commuters; however additional data is needed to better understand this finding.

Age

Table 2 – Age of survey respondents

All Age	N	%	X18			Kings Ferry		
			Age	N	%	Age	N	%
2014								
17-20	13	12.6	17-20	8	11.9	17-20	5	13.9
21-29	18	17.5	21-29	12	17.9	21-29	6	16.7
30-39	23	22.3	30-39	18	26.9	30-39	5	13.9
40-49	37	35.9	40-49	28	41.8	40-49	9	25.0
50-59	7	6.8	50-59	0	0	50-59	7	19.4
60-69	4	3.9	60-69	1	1.5	60-69	3	8.3
70+	1	1.0	70+	0	0	70+	1	2.8
Total	103		Total	67		Total	36	
2015								
17-20	27	19.4	17-20	24	28.2	17-20	3	5.6
21-29	37	26.6	21-29	29	34.1	21-29	8	14.8
30-39	25	18.0	30-39	18	21.2	30-39	7	13.0
40-49	27	19.4	40-49	9	10.6	40-49	18	33.3
50-59	14	10.1	50-59	4	4.7	50-59	10	18.5
60-69	7	5.0	60-69	1	1.2	60-69	6	11.1
70+	2	1.4	70+	0	0.0	70+	2	3.7
Total	139		Total	85		Total	54	

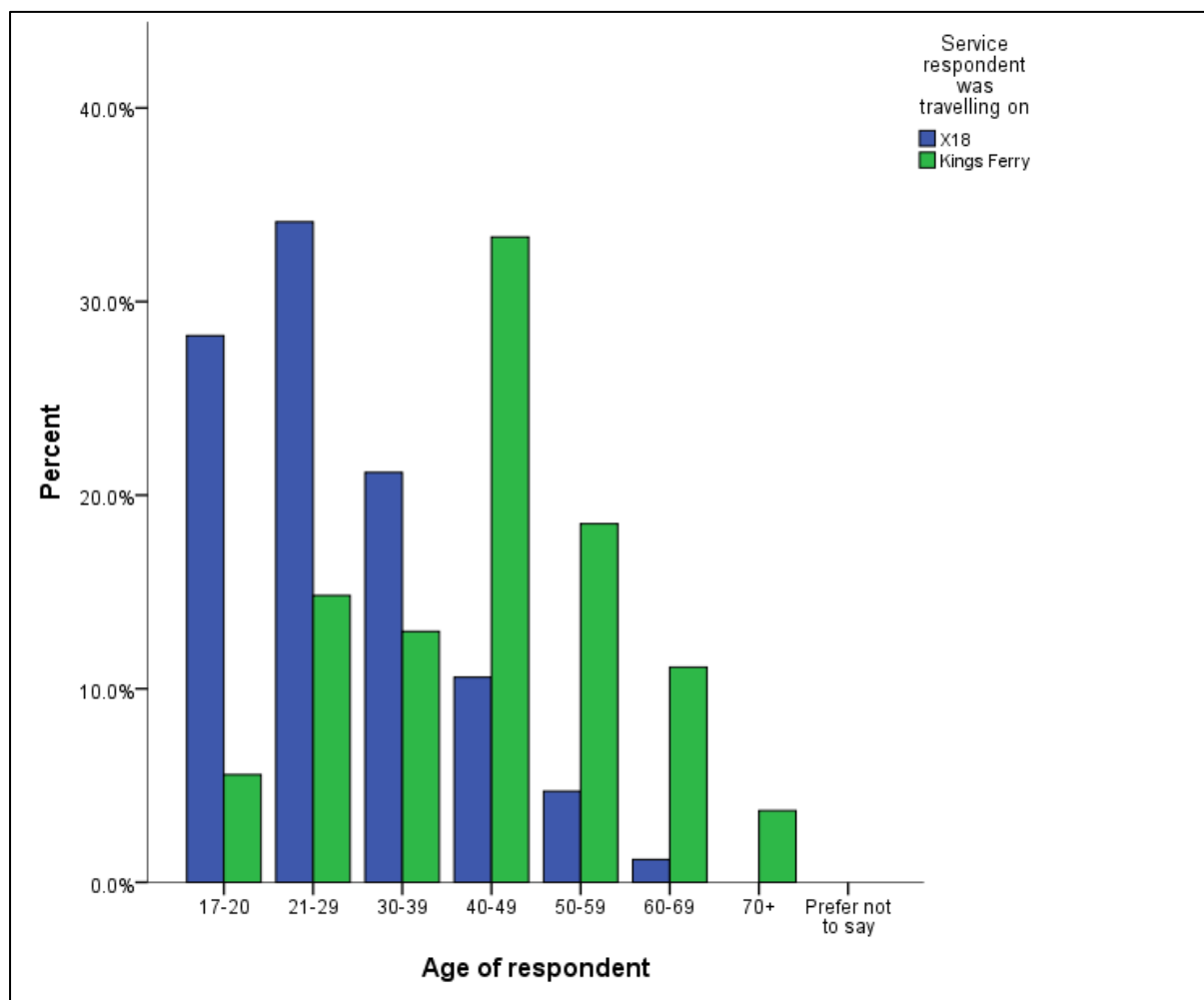


Chart 4 - Age of survey respondents – 2015 survey

The results for age show that at the aggregate level the services have different age profiles, and this is a marked change from the 2014 survey where these were more similar.

On the X18, the highest proportions of passengers are in the lowest age ranges, with 24 passengers in the 17-20 range (28%), and 29 passengers in the 21-29 range (34%). Only 6% of passengers are aged over 50. On the Kings Ferry however, a high proportion of passengers is in the middle age bands. On this service, 18 passengers are in the 40-49 range (33%), and a further 10 (19%) are in the 50-59 age range. There are only 3 passengers (6%) in the 17-20 range, whilst at the upper end there are 6 (11%) aged 60-69 and 2 (4%) aged 70 or above. These last two results are interesting when compared to that of the X18 where there was almost nobody in these upper age bands.

Since the 2014 survey the greatest change has been amongst the demographic of the X18 passengers, where there has been a strong shift towards younger passengers. Previously, the X18's profile far more closely matched that of the Kings Ferry, which has maintained approximately the same profile, albeit with a slight shift towards the older end of the scale. Where in 2014 at the aggregate level both services were being used in the greatest number by people in the middle age ranges, now the two services almost cater to opposite ends of the age range.

This change in age demographic suggests that the X18 has become more attractive to younger passengers, however the data does not provide further insight into possible explanations for this. In the case of the Kings Ferry, as with in 2014, the service remains particularly attractive to older travellers, potentially in more senior positions in employment – which would fit with the ‘executive’ focus of the service. More data is required to interrogate this further however.

Journey purpose

Table 3 – Journey purpose of survey respondents

All Journey Purpose	N	%	X18 Journey Purpose			Kings Ferry Journey Purpose		
				N	%		N	%
2014								
Business	7	5.6	Business	0	0	Business	7	20.6
Commuting	100	80.0	Commuting	76	83.5	Commuting	24	70.6
Leisure	4	3.2	Leisure	2	2.2	Leisure	2	5.9
Education	11	8.8	Education	11	12.1	Education	0	0
Shopping	3	2.4	Shopping	2	2.2	Shopping	1	2.9
Total	125		Total	91		Total	34	
2015								
Business	47	33.3	Business	26	29.9	Business	21	38.9
Commuting	73	51.8	Commuting	42	48.3	Commuting	31	51.8
Leisure	3	2.1	Leisure	3	3.4	Leisure	0	0.0
Education	14	9.9	Education	14	16.1	Education	0	0.0
Shopping	4	2.8	Shopping	2	2.3	Shopping	2	3.7
Total	141		Total	87		Total	54	

In 2015, the majority of trips on both services were for commuting or business purposes. Given the nature of the services and the responses of passengers to the later question regarding their frequency of trips on the services, it is suggested that passengers are not making a strong distinction between these two categories, and that the majority of ‘business’ trips in fact represent the daily commute. As such, in the subsequent analyses, the ‘Business’ and ‘Commuting’ categories have been combined for the analysis of those travelling to the North Fringe for the purposes of employment.

The only distinguishing difference between the two services in respect of journey purpose is that the X18 is carrying a greater proportion of passengers travelling for the purposes of education (14/16%) and leisure (3/3%). By contrast, on the Kings Ferry, no passengers were travelling for educational or leisure purposes.

Overall, 73 passengers (52%) were on commuting trips, and a further 47 (33%) travelling for business. This makes a total of 85% of trips on all services being to access employment. This finding demonstrates that the services are performing well in terms of serving their core demographic as commuter routes.

There has been very little change in comparison to the 2014 survey. In the previous year, 107 out of 125 (86%) of passengers were travelling for the purpose of employment.

It should be noted that the results presented in the remainder of this section are only those from

passengers travelling in the morning peak for the purposes of employment on inbound trips to the North Fringe. The revised sample sizes for these analyses are provided below.

Table 4 – Sample sizes for employees on commuting services

	N		
	All	X18	Kings Ferry
2014: Travelling for employment	76	45	31
2015: Travelling for employment	102	50	52

Commuters – length of employment

Table 5 – Length of current employment amongst survey respondents

All Employment length			X18 Employment length			Kings Ferry Employment length		
	N	%		N	%		N	%
<i>2014</i>								
< 6 months	11	15.7	< 6 months	6	15.0	< 6 months	5	16.7
6 mths – 1 yr	17	24.3	6 mths – 1 yr	12	30.0	6 mths – 1 yr	5	16.7
1 – 2 years	11	15.7	1 – 2 years	10	25.0	1 – 2 years	1	3.3
2 – 5 years	13	18.6	2 – 5 years	5	12.5	2 – 5 years	8	26.7
> 5 years	18	25.7	> 5 years	7	17.5	> 5 years	11	36.7
Total	70		Total	40		Total	30	
<i>2015</i>								
< 6 months	20	20.0	< 6 months	12	24.5	< 6 months	8	15.7
6 mths – 1 yr	10	10.0	6 mths – 1 yr	7	14.3	6 mths – 1 yr	3	5.9
1 – 2 years	14	14.0	1 – 2 years	10	20.4	1 – 2 years	4	7.8
2 – 5 years	18	18.0	2 – 5 years	8	16.3	2 – 5 years	10	19.6
> 5 years	38	38.0	> 5 years	12	24.5	> 5 years	26	51.0
Total	100		Total	49		Total	51	

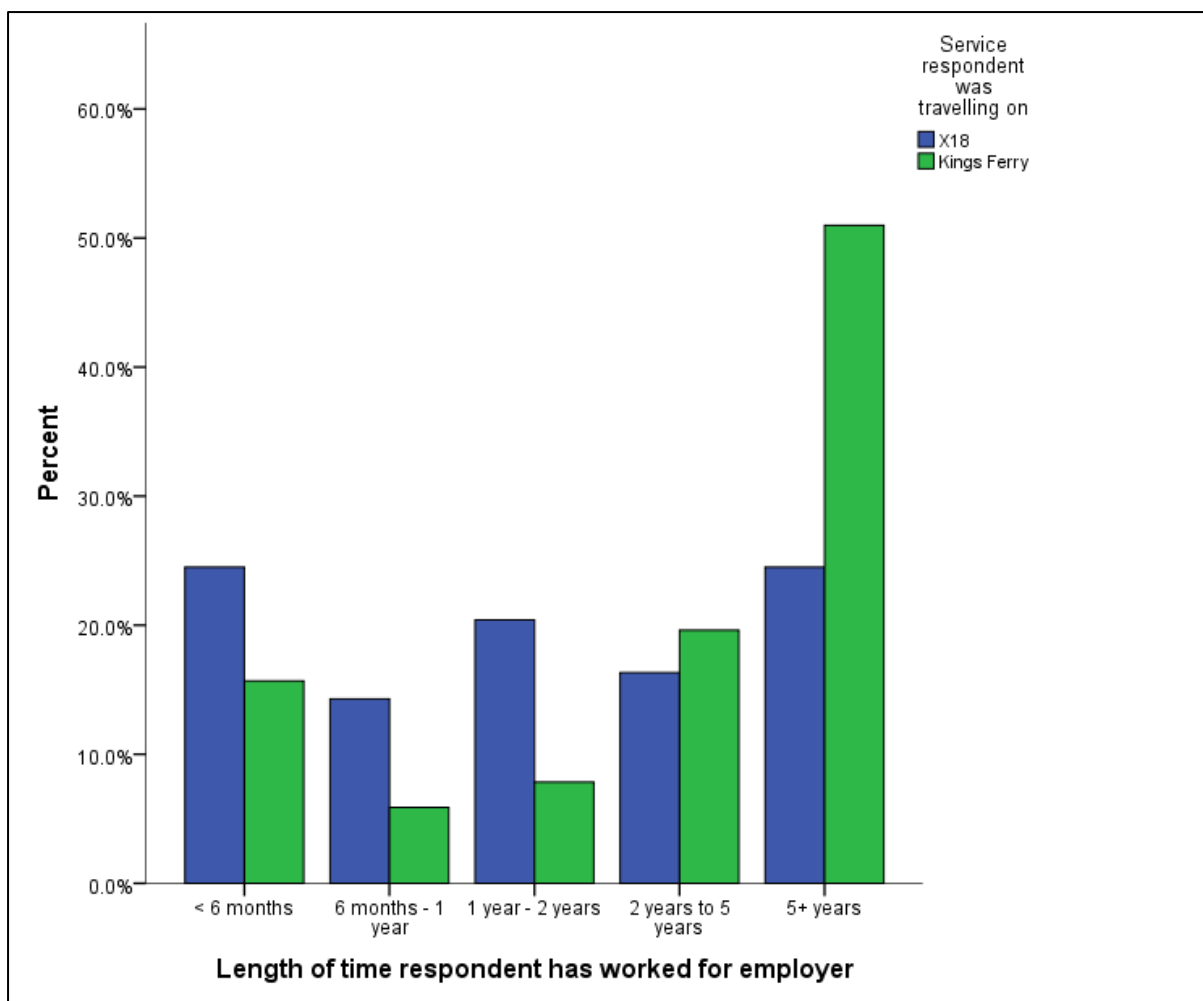


Chart 5 - Length of current employment amongst survey respondents – 2015 survey

The data demonstrate that there is a difference in the profile of X18 and Kings Ferry users with respect to the length of time passengers have worked for their current employer. In the case of the X18, there is a relatively even spread in lengths of employment, with identical proportions of passengers having worked for under 6 months (12/25%) and over 5 years (12/25%).

In the case of the Kings Ferry, the profile is quite different. The majority of passengers on this service have been in their current employment for over 5 years (26/51%). Only 3 passengers (6%) had been employed for 6 months to a year and 8 passengers (16%) had been employed for under 6 months.

Compared to the 2014 survey, there has been a slight shift on both services towards passengers having worked for their employer for a longer period of time. The data does not allow for a thorough investigation of this, however possible explanations could be that either the services have become more attractive to longer-term employees over the course of the year in between surveys (potentially as they become more entrenched and visible), or that the 2015 survey is capturing some of the same participants as in 2014, and these people have simply moved over the threshold and into a higher category during the period.

The difference in profile between the two services is consistent with the earlier findings related to age, and could support the hypothesis that a high proportion of commuters on the Kings Ferry are those employees in more senior positions within their respective organisations.

Frequency of travel on service

Table 6 – Frequency of service use amongst service respondents

All			X18			Kings Ferry		
Frequency of use	N	%	Frequency of use	N	%	Frequency of use	N	%
<i>2014</i>								
Almost every day	46	64.8	Almost every day	27	65.9	Almost every day	19	63.3
At least once a week	15	21.1	At least once a week	9	22.0	At least once a week	6	20.0
About 1-3 times a month	6	8.5	About 1-3 times a month	4	9.8	About 1-3 times a month	2	6.7
Less often	4	5.6	Less often	1	2.4	Less often	3	10.0
Total	71		Total	41		Total	30	
<i>2015</i>								
Almost every day	81	79.4	Almost every day	41	82.0	Almost every day	40	76.9
At least once a week	12	11.8	At least once a week	6	12.0	At least once a week	6	11.5
About 1-3 times a month	3	2.9	About 1-3 times a month	1	2.0	About 1-3 times a month	2	3.8
Less often	6	5.9	Less often	2	4.0	Less often	4	7.7
Total	102		Total	50		Total	52	

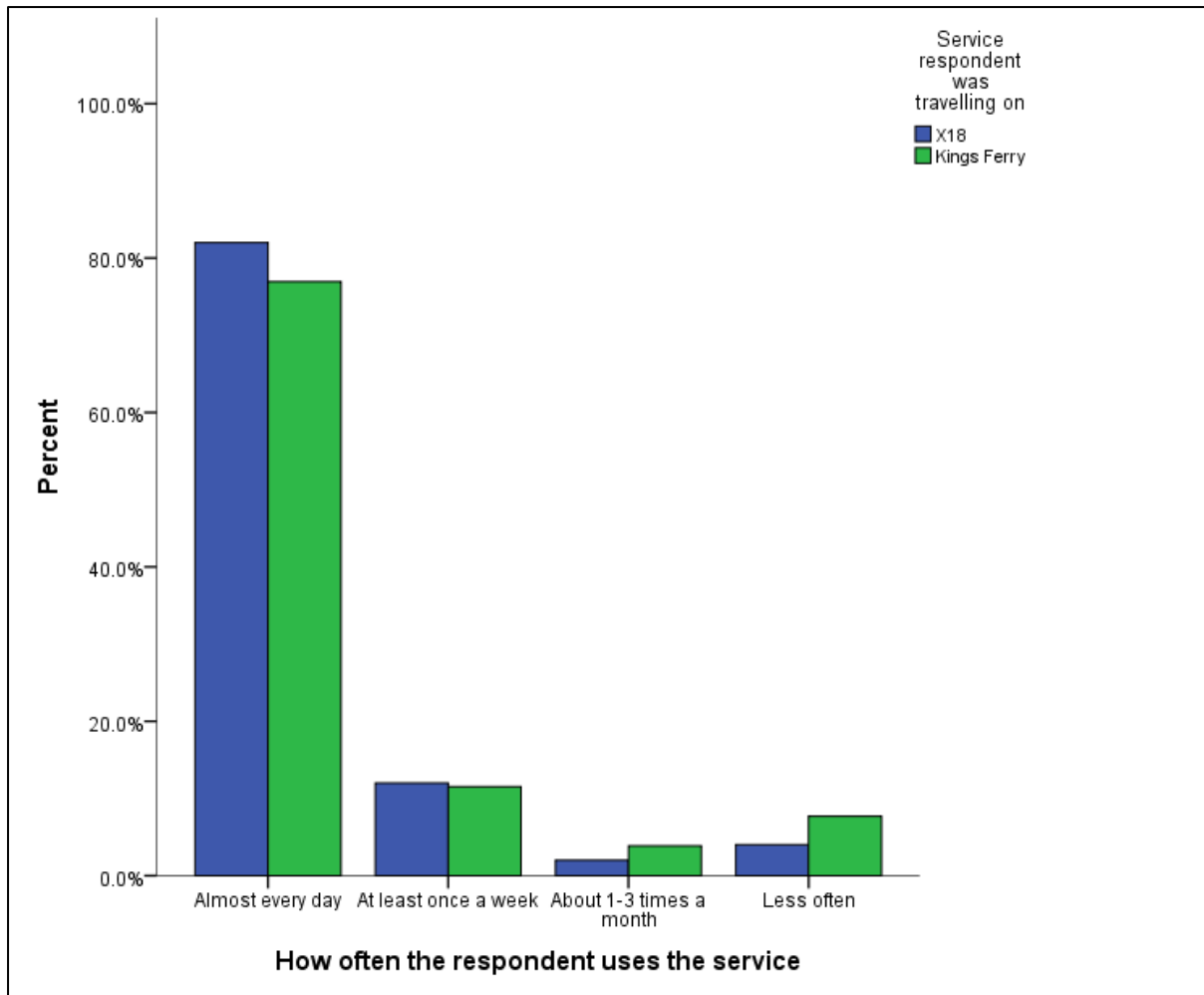


Chart 6 - Frequency of service use amongst survey respondents – 2015 survey

Across both of the services, the large proportion of passengers is using the service very frequently, with 81 out of 102 (79%) using the service every day. A further 12 out of 102 (12%) were using the service at least once a week, meaning that a total of 91% of passengers are using the services on a weekly basis.

There has been a strong shift towards more frequent usage since the 2014 survey. In 2014, 65% of people were using the services on a daily basis and in 2015 this has risen to 79%. This suggests that many passengers are now using the service more often than they were a year ago.

Passenger satisfaction

Table 7 – Overall standard of the service

All Satisfaction			X18 Satisfaction			Kings Ferry Satisfaction		
	N	%		N	%		N	%
<i>2014</i>								
Very satisfied	22	29.3	Very satisfied	0	0	Very satisfied	22	71.0
Satisfied	27	36.0	Satisfied	18	40.9	Satisfied	9	29.0
Neutral	21	28.0	Neutral	21	47.7	Neutral	0	0
Dissatisfied	5	6.7	Dissatisfied	5	11.4	Dissatisfied	0	0
Very dissatisfied	0	0	Very dissatisfied	0	0	Very dissatisfied	0	0
Total	75		Total	44		Total	31	
<i>2015</i>								
Very satisfied	45	44.6	Very satisfied	6	12.2	Very satisfied	39	75.0
Satisfied	32	31.7	Satisfied	19	38.8	Satisfied	13	25.0
Neutral	19	18.8	Neutral	19	38.8	Neutral	0	0.0
Dissatisfied	5	5.0	Dissatisfied	5	10.2	Dissatisfied	0	0.0
Very dissatisfied	0	0.0	Very dissatisfied	0	0.0	Very dissatisfied	0	0.0
Total	101		Total	49		Total	52	

Table 8 – Punctuality of services

All Satisfaction			X18 Satisfaction			Kings Ferry Satisfaction		
	N	%		N	%		N	%
<i>2014</i>								
Very satisfied	19	25.7	Very satisfied	0	0	Very satisfied	19	61.3
Satisfied	19	25.7	Satisfied	8	18.6	Satisfied	11	35.5
Neutral	30	40.5	Neutral	29	67.4	Neutral	1	3.2
Dissatisfied	6	8.1	Dissatisfied	6	14.0	Dissatisfied	0	0
Very dissatisfied	0	0	Very dissatisfied	0	0	Very dissatisfied	0	0
Total	74		Total	43		Total	31	
<i>2015</i>								
Very satisfied	40	39.6	Very satisfied	1	2.0	Very satisfied	39	75.0
Satisfied	22	21.8	Satisfied	9	18.4	Satisfied	13	25.0
Neutral	22	21.8	Neutral	22	44.9	Neutral	0	0
Dissatisfied	12	11.9	Dissatisfied	12	24.5	Dissatisfied	0	0
Very dissatisfied	5	5.0	Very dissatisfied	5	10.2	Very dissatisfied	0	0
Total	101		Total	49		Total	52	

Table 9 – Frequency of services

All Satisfaction	N	%	X18 Satisfaction	N	%	Kings Ferry Satisfaction	N	%
<i>2014</i>								
Very satisfied	14	19.7	Very satisfied	0	0	Very satisfied	14	48.3
Satisfied	24	33.8	Satisfied	10	23.8	Satisfied	14	48.3
Neutral	30	42.3	Neutral	29	69.0	Neutral	1	3.4
Dissatisfied	3	4.2	Dissatisfied	3	7.1	Dissatisfied	0	0
Very dissatisfied	0	0	Very dissatisfied	0	0	Very dissatisfied	0	0
Total	71		Total	42		Total	29	
<i>2015</i>								
Very satisfied	26	25.7	Very satisfied	3	6.1	Very satisfied	23	44.2
Satisfied	33	32.7	Satisfied	14	28.6	Satisfied	19	36.5
Neutral	18	17.8	Neutral	11	22.4	Neutral	7	13.5
Dissatisfied	22	21.8	Dissatisfied	19	38.8	Dissatisfied	3	5.8
Very dissatisfied	2	2.0	Very dissatisfied	2	4.1	Very dissatisfied	0	0
Total	101		Total	49		Total	52	

Table 10 – Value for money of the journey

All Satisfaction	N	%	X18 Satisfaction	N	%	Kings Ferry Satisfaction	N	%
<i>2014</i>								
Very satisfied	10	14.3	Very satisfied	0	0	Very satisfied	10	33.3
Satisfied	23	32.9	Satisfied	12	30.0	Satisfied	11	36.7
Neutral	29	41.4	Neutral	23	57.5	Neutral	6	20.0
Dissatisfied	7	10.1	Dissatisfied	5	12.5	Dissatisfied	2	6.7
Very dissatisfied	1	0	Very dissatisfied	0	0	Very dissatisfied	1	3.3
Total	70		Total	40		Total	30	
<i>2015</i>								
Very satisfied	28	28.0	Very satisfied	9	18.4	Very satisfied	19	37.3
Satisfied	41	41.0	Satisfied	19	38.8	Satisfied	22	43.1
Neutral	22	22.0	Neutral	13	26.5	Neutral	9	17.6
Dissatisfied	5	5.0	Dissatisfied	5	10.2	Dissatisfied	0	0
Very dissatisfied	4	4.0	Very dissatisfied	3	6.1	Very dissatisfied	1	2.0
Total	100		Total	49		Total	51	

Table 11 – Journey time of the service

All Satisfaction	N	%	X18			Kings Ferry		
			Satisfaction	N	%	Satisfaction	N	%
2014								
Very satisfied	22	32.8	Very satisfied	4	11.1	Very satisfied	18	58.1
Satisfied	26	38.8	Satisfied	16	44.4	Satisfied	10	32.3
Neutral	17	25.4	Neutral	14	38.9	Neutral	3	9.7
Dissatisfied	2	3.0	Dissatisfied	2	5.6	Dissatisfied	0	0
Very dissatisfied	0	0	Very dissatisfied	0	0	Very dissatisfied	0	0
Total	67		Total	36		Total	31	
2015								
Very satisfied	35	35.0	Very satisfied	8	16.3	Very satisfied	27	52.9
Satisfied	38	38.0	Satisfied	20	40.8	Satisfied	18	35.3
Neutral	19	19.0	Neutral	14	28.6	Neutral	5	9.8
Dissatisfied	7	7.0	Dissatisfied	6	12.2	Dissatisfied	1	2.0
Very dissatisfied	1	1.0	Very dissatisfied	1	2.0	Very dissatisfied	0	0
Total	100		Total	49		Total	51	

Passenger satisfaction with the services is generally high across all of the categories measured. There has been an increase in general satisfaction with both services since the 2014 survey.

The data show that in 2015 in general, Kings Ferry passengers continued to give consistently high ratings of satisfaction with very few instances of dissatisfaction recorded. However there has been a slight negative shift in satisfaction with the frequency of services since 2014. On the X18, there is more of a spread of responses; however generally responses are positive.

In 2015, the majority of passengers – 77 out of 101 (76%) were either satisfied or very satisfied with the services. This is an increase of 11 percentage points in overall general satisfaction since 2014. This increase in general satisfaction can be largely attributed to improvements on the X18 service; 25 out of 49 people (51%) identified themselves as satisfied or very satisfied in 2015, compared to 18 out of 44 (41%) in 2014. On the Kings Ferry, at the aggregate level satisfaction remained the same, with 100% of passengers reporting themselves as satisfied or very satisfied. Within this however, there has been a positive shift towards those reporting themselves as very satisfied: in 2015 39 out of 52 passengers (75%) were very satisfied, up from 71% in 2014.

The aggregate results for punctuality show that 62 out of 101 passengers (61%) were either satisfied or very satisfied. This is an increase of 10 percentage points on the 2014 results, where 51% were satisfied with punctuality. This result can be explained in part by the X18 data. In 2014 the majority of passengers (67%) were neutral on the issue of punctuality, however in 2015 a lower proportion reported themselves as neutral (45%), and 10 out of 49 (20%) reported themselves as either satisfied or very satisfied with punctuality, an increase of 1 percentage points on the 2014 results (19%). At the same time however, a higher proportion of X18 passengers in the 2015 survey reported themselves as dissatisfied or very dissatisfied with punctuality. In 2014, 14% of passengers had reported themselves as being dissatisfied or very dissatisfied with punctuality, whereas in 2015, 17 out of 49 (35%) reported being either dissatisfied or very dissatisfied. On the Kings Ferry, satisfaction with punctuality improved slightly from the 2014 result, achieving 100% (51 out of 51) of passengers reporting themselves as either satisfied or very satisfied with punctuality. This is an improvement on the previous year, where the Kings Ferry recorded 97% satisfaction. These findings suggest that whilst the X18 has seen a slight rise in the proportion of people reporting themselves as satisfied

with punctuality, this is outweighed by the opposing increase in those reporting dissatisfaction, and attending to issues of punctuality should be a key focus on this service.

Taken together, the data for frequency of services shows that the majority of passengers (59/101: 69%) were either satisfied or very satisfied. This is an improvement from 2014, where 54% reported the same. When looking at the X18, in 2014 the majority of passengers reported themselves neutral (29/42: 69%), in 2015, this proportion has dropped to 23%, and there have been resultant increases in both the proportions of passengers reporting themselves as either satisfied or very satisfied (17/49: 35%), but also in those reporting themselves as dissatisfied or very dissatisfied (21/49: 43%). Indeed, it is the result for dissatisfaction on the X18 which represents the larger change, where in 2014 just 7% of passengers reported themselves as dissatisfied. As mentioned in the introduction to this section, the X18 service has witnessed the reduction of its scheduled services over this period, and this has evidently been reflected in the satisfaction results for this aspect of the service. In the case of the Kings Ferry, the majority of passengers reported good levels of satisfaction, with 42 out of 52 (81%) being either satisfied or very satisfied. Nonetheless in this area the Kings Ferry has experienced a decline in satisfaction since 2014, when 97% listed themselves as either satisfied or very satisfied. This result is somewhat counterintuitive considering the fact that the level of service provision has in fact increased.

There have been improvements in satisfaction with value for money across both services, with the X18 reporting the biggest increase. At the aggregate level, 69 out of 100 passengers (69%) were either satisfied or very satisfied with fares on the services. This represents an increase of 22 percentage points on the 2014 score of 47%. On the X18, 28 out of 49 (57%) were satisfied or very satisfied with value for money, which is an increase of 27 percentage points over the 30% figure from 2014. On the Kings Ferry, 41 out of 51 passengers (80%) were either satisfied or very satisfied with value for money, an increase of 10 percentage points on 2014. These results suggest that both services are improving in this area, and this increase is a particularly relevant finding for the X18, where satisfaction with fares in 2014 was quite low.

For satisfaction with journey times, across both services 73 out of 100 passengers (73%) were either satisfied or very satisfied. The 2014 survey reported 72% for this measure. When looking at the services individually, the X18 reported 28 out of 49 (57%) passengers as either satisfied or very satisfied, and when compared to the previous year's result of 56% there has been a slight increase of 1 percentage points. On the Kings Ferry, there has been a slight decrease in this measure over the period: 45 out of 51 passengers (88%) in 2015 reported themselves as satisfied or very satisfied, compared to 90% in 2014, a reduction of 2 percentage points. The low sample sizes in both of these cases mean that these small discrepancies should be treated with caution however, and the main message in this category appears to be that satisfaction with journey time has been maintained over the year.

As a whole, the satisfaction results for the services are encouraging, and the data demonstrate a number of areas in which the services have either improved or maintained high levels of satisfaction over the period. There are a number of areas which warrant attention however. On the X18, there is a generally positive overall perception of the service, with punctuality and frequency being the areas with lowest satisfaction ratings. There has been an improvement in satisfaction with fares. The Kings Ferry enjoys a consistently high satisfaction rating, demonstrating it to be providing a quality service which has improved upon results which were already high in the previous year.

Year respondent began using service

Table 12 – Year respondent began using service

All Year	N	%	2015					
			X18 Year	N	%	Kings Ferry Year	N	%
2012	2	2.0	2012	2	4.3	2012	0	0
2013	28	28.6	2013	14	30.4	2013	14	26.9
2014	47	48.0	2014	20	43.5	2014	27	51.9
2015	21	21.4	2015	10	21.7	2015	11	21.2
Total	98		Total	46		Total	52	

Table 12 provides some insight into whether the services have continued to attract new passengers, or whether they are increasingly serving a loyal commuter base who are accessing the North Fringe for employment. It should be noted that these services started operating at different times, and so the results will be influenced by this. The Kings Ferry was not operational in 2012, which explains the finding that no passengers reported using the service that year. Beyond this however, it is evident that the patterns of uptake on both services are relatively similar, with the majority of passengers having started using the services in 2014, when they had been operational for some time and had become more established and visible. In the case of the Kings Ferry, the figure for 2013 (14/27%) demonstrates that the service had a particularly attractive/effective opening offer, considering that it only began operations in November of that year, and yet the proportion of its passengers which reported starting to use it then closely resembles that of the X18, which was in operation for the entirety of 2013. As mentioned previously, this could well be linked to the initial offer of free travel for the first two months of the service’s operation.

The data for 2015 demonstrates that the services are continuing to attract new passengers – with this data representing just the first quarter of 2015.

Previous mode of access

Table 13 – Previous mode of travel amongst survey respondents

All			X18			Kings Ferry		
Previous mode	N	%	Previous mode	N	%	Previous mode	N	%
<i>2014</i>								
Car	35	53.8	Car	18	52.9	Car	17	54.8
Car share	5	7.7	Car share	5	14.7	Car share	0	0
Other bus	6	9.2	Other bus	3	8.8	Other bus	3	9.7
Rail	8	12.3	Rail	0	0	Rail	8	25.8
Cycle	1	1.5	Cycle	1	2.9	Cycle	0	0
Walk	0	0	Walk	0	0	Walk	0	0
Didn't make trip	10	15.4	Didn't make trip	7	20.6	Didn't make trip	3	9.7
Total	65		Total	34		Total	31	
<i>2015</i>								
Car	26	26.5	Car	2	4.3	Car	24	47.1
Car share	4	4.1	Car share	1	2.1	Car share	3	5.9
Other bus	27	27.6	Other bus	19	40.4	Other bus	8	15.7
Rail	5	5.1	Rail	0	0	Rail	5	9.8
Cycle	2	2.0	Cycle	1	2.1	Cycle	1	2.0
Walk	1	1.0	Walk	1	2.1	Walk	0	0
Didn't make trip	32	32.7	Didn't make trip	22	46.8	Didn't make trip	10	19.6
Total	98		Total	47		Total	51	

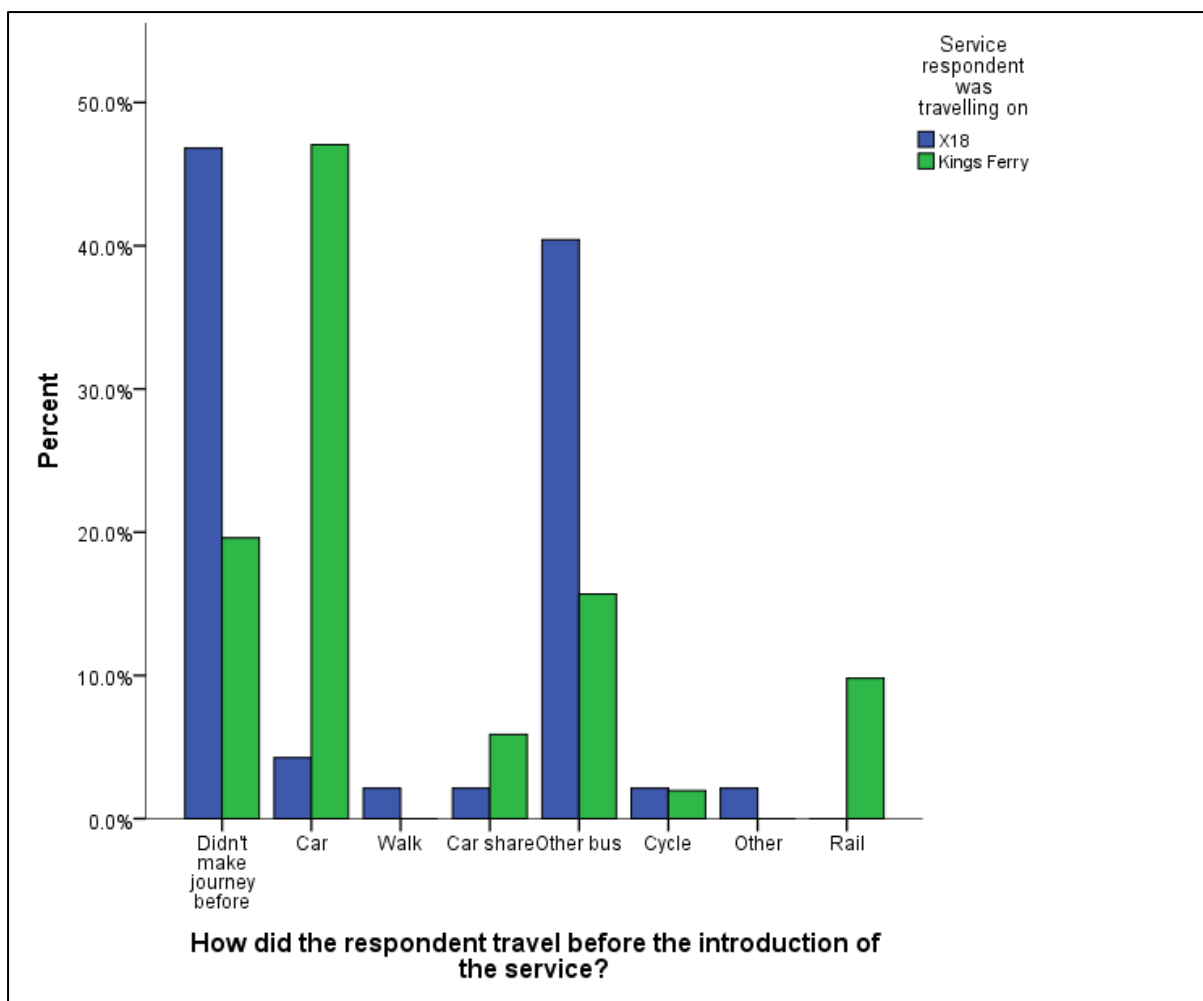


Chart 7 - Previous mode of travel amongst survey respondents – 2015 survey

When looking at previous mode of access, there is a difference between the two services in terms of how people used to travel before the introduction of the service.

On the X18, the highest proportions of participants reported having either not made the journey before the introduction of the service (22/47, 47%), or having switched from using another bus service (19/47, 40%). This finding represents an interesting contrast from the previous year’s results, where the majority (53%) of X18 users had reported switching from car travel. The data does not provide any more information about this result, although it may be that initially the service was attractive mainly to car users, and then once this group of travellers had shifted to the service, it then caught the attention of other local bus users and those people starting to make journeys to the North Fringe.

On the Kings Ferry, the 2015 results are very similar to those from 2014. The largest proportion of passengers had switched from car travel (24/51, 47%), and the second highest did not make the journey before (10/51, 20%), demonstrating that this service has been effective at both attracting car users, and also at providing a link to the North Fringe which did not exist before for some passengers.

Method of introduction to service

Table 14 – Method by which respondents were introduced to the new service

All Method	N	%	X18 Method	N	%	Kings Ferry Method	N	%
<i>2014</i>								
Operator website	2	3.0	Operator website	2	5.1	Operator website	0	0
Council website	10	15.2	Council website	9	23.1	Council website	1	3.7
Bus stop	12	18.2	Bus stop	7	17.9	Bus stop	5	18.5
Newspaper	2	3.0	Newspaper	0	0	Newspaper	1	7.4
Work email	1	1.5	Work email	1	2.6	Work email	0	0
Poster	4	6.1	Poster	3	7.7	Poster	1	3.7
Timetable	5	7.6	Timetable	5	12.8	Timetable	0	0
Roadshow	8	12.1	Roadshow	8	20.5	Roadshow	0	0
Facebook/Twitter	1	1.5	Facebook/Twitter	1	2.6	Facebook/Twitter	0	0
Other	3	4.5	Other	3	7.7	Other	0	0
Employer	9	13.6	Employer	0	0	Employer	9	33.3
Recommendation	4	6.1	Recommendation	0	0	Recommendation	4	14.8
Several of these	5	7.6	Several of these	0	0	Several of these	5	18.5
Total	66		Total	39		Total	27	
<i>2015</i>								
Operator website	28	29.5	Operator website	12	25.0	Operator website	16	34.0
Council website	1	1.1	Council website	0	0	Council website	1	2.1
Bus stop	12	12.6	Bus stop	12	25.0	Bus stop	0	0
Newspaper	3	3.2	Newspaper	1	2.1	Newspaper	2	4.3
Work email	1	1.1	Work email	0	0	Work email	1	2.1
Poster	6	6.3	Poster	1	2.1	Poster	5	10.6
Timetable	2	2.1	Timetable	1	2.1	Timetable	1	2.1
Roadshow	6	6.3	Roadshow	6	12.5	Roadshow	0	0
Facebook/Twitter	N/A	N/A	Facebook/Twitter	N/A	N/A	Facebook/Twitter	N/A	N/A
Other	5	5.3	Other	4	8.3	Other	1	2.1
Employer	12	12.6	Employer	0	0	Employer	12	25.5
Recommendation	8	8.4	Recommendation	0	0	Recommendation	8	17.0
Several of these	11	11.6	Several of these	11	22.9	Several of these	0	0
Total	95		Total	48		Total	47	

The data for 2015 show that there were a variety of ways in which passengers were introduced to the services. On the X18, the most important methods of introduction were through: the operator website (12/48, 25%); bus stops (12/48, 25%); roadshows (6/48, 13%); or a combination of several (11/48: 23%). On the Kings Ferry, the most important methods of introduction were through: the operator website (16/47, 34%); employer (12/47, 26%); recommendation (8/47, 17%); and poster (5/47, 11%).

Car access

Table 15 – Car access for current journey amongst survey respondents

All			X18			Kings Ferry		
Could have used car for journey	N	%	Could have used car for journey	N	%	Could have used car for journey	N	%
2014								
Yes	41	61.2	Yes	18	50.0	Yes	23	74.2
No	26	38.8	No	18	50.0	No	8	25.8
Total	67		Total	36		Total	31	
2015								
Yes	48	47.1	Yes	18	36.0	Yes	30	57.7
No	54	52.9	No	32	64.0	No	22	42.3
Total	102		Total	50		Total	52	

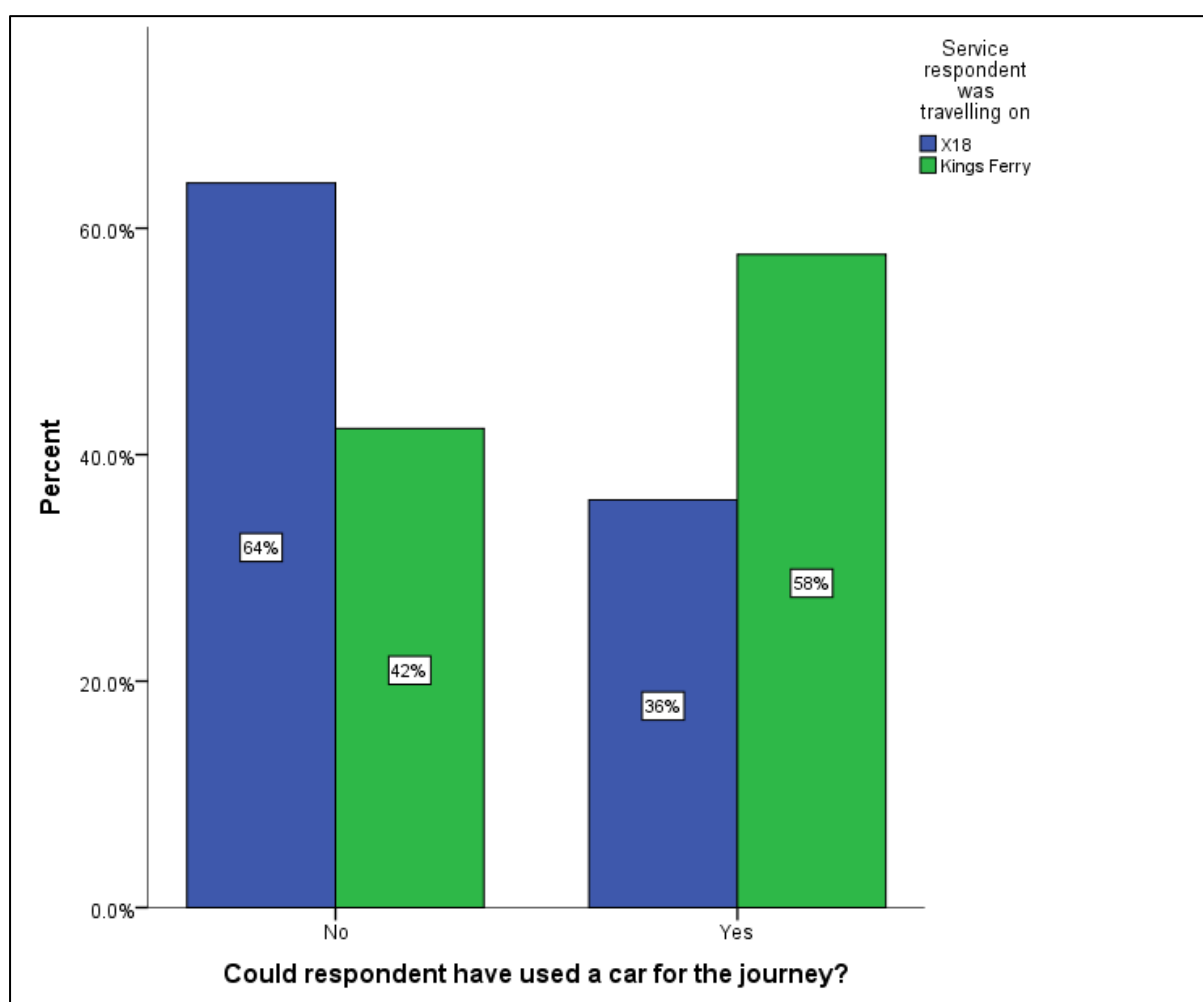


Chart 8 - Car access for current journey amongst survey respondents – 2015 survey

For car access in the 2015 survey, the services have different profiles. At the aggregate level, 48 out of 102 passengers (47%) had access to a car for their journey. A lower proportion of passengers had access to a car (18/50, 36%) on the X18 compared to the Kings ferry (30/52, 58%). Car access is reasonably high on both services, demonstrating that they are appealing to people who otherwise have the option of driving.

RTI use

Table 16 – RTI use on the X18

Has respondent used RTI?	2014		2015	
	N	%	N	%
Yes	13	37.1	23	46.9
No	22	62.9	26	53.1
Total	35		49	

Table 17 – RTI use on the Kings Ferry

Has respondent used Kings Ferry Coach Tracker?	2014		2015	
	N	%	N	%
Yes, on website and mobile app	1	3.2	7	13.5
Yes, on website only	1	3.2	4	7.7
Yes, on mobile app only	5	16.1	13	25.0
No, have not used service	24	77.4	28	53.8
Total	31		52	

The proportions of people using RTI have increased on both services over the period. *Note: the RTI systems for the two services are different, and as such in this case it was necessary to ask different questions on the two services, and as such a direct comparison has not been possible.*

On the X18, in 2015, 23 out of 49 passengers (47%) had used the RTI service, and this represents an increase of 9 percentage points over the 2014 total of 37%. There is a similar story on the Kings Ferry, where in 2015, 24 out of 52 passengers (46%) had used some form of RTI, an increase of 23 percentage points on the previous year's total of 23%. At the disaggregate level, the mobile app was the most popular form of RTI access on the Kings Ferry, with 13 out of 52 passengers using this.

The previous report noted an opportunity to increase usage of RTI amongst passengers, and it is evident that both services have managed to do so over the 2014-2015 period. Continuing to promote the use of RTI could be of potential benefit in increasing levels of confidence in using services and also potentially in addressing issues such as *perceptions* of punctuality and reliability.

1.4 Summary

The long-term viability of the two LSTF-funded bus services serving commuters working in the North Fringe of Bristol depends upon their ability to attract sufficient users. The current patronage data demonstrates that the X18 has experienced a steady growth in passengers since 2012. The Kings Ferry experienced initially high patronage, which fell sharply at the end of the promotional free travel period introduced at the service's inception. Following this initial decline, the Kings Ferry has seen a moderate increase in patronage over the past year.

The results for 2015 show that the services are both catering predominantly for commuters - their intended target group at peak times. The Kings Ferry service is successfully attracting passengers who had previously used the car to travel to work, while for the X18 service most passengers had

used other bus services previously or had not made the journey before. About half of all users have access to a car for their commute with this higher for Kings Ferry users.

The services have markedly different age profiles with most X18 users being under 40 years and most Kings Ferry users being over 40 years. Kings Ferry users are predominantly male. Most Kings Ferry users had been in their current job for at least two years, while for the X18 more than half of users had been in their current job less than two years.

The Kings Ferry service enjoys a consistently high rating of satisfaction, showing it to be providing a quality service which has improved upon results which were already high in the previous year. On the X18, there is a generally positive overall perception of the service, with punctuality and frequency providing dissatisfaction to some users. Overall satisfaction levels with these two services provide an interesting contrast to the results of the March 2014 Employee Survey for North Fringe and Portside, which showed that only 31% of public bus users were either quite satisfied or very satisfied with their journey to work. This demonstrates that the objective of establishing public transport services that are rated highly by commuters has been achieved.

Appendix 13: Panel survey – characteristics of the sample

Characteristics of wave 1 analysis sample

CHARACTERISTIC	n	%
DEMOGRAPHIC		
Male	830	56.5
Disability	74	5.04
Age: 17 to 29	162	11.03
Age: 30 to 39	333	22.67
Age: 40 to 49	431	29.34
Age: 50 to 59	464	31.59
Age: 60+	77	5.24
EMPLOYMENT		
Employment: Manual	130	8.85
Employment: Junior/clerical	320	21.78
Employment: Middle management	321	21.85
Employment: Professional / Management	690	46.97
Part-time employed [Ref: No]	196	13.34
COMMUTE JOURNEY		
Commute distance: 0 to 5mi	376	25.59
Commute distance: 5 to 10mi	412	28.05
Commute distance: 10 to 25mi	400	27.23
Commute distance: 25mi+	253	17.22
Empl location: Filton	471	32.06
Empl location: Fringe	122	8.3
Empl location: Portside	80	5.45
Empl location: Stoke Gifford	796	54.19
Car parking spaces per employee (<i>mean / SD</i>)	0.48	0.18
Worked in another location during diary week	242	16.47
MOBILITY RESOURCES		
Access to a bicycle for work	654	44.52
Access to a car for work	1182	80.46
Driving licence	1334	90.81
LIFE EVENTS		
Moved home	68	4.63
Changed workplace	109	7.42
Sample size	1469	

Appendix 14: Panel survey – example questionnaire



University of the
West of England

Travel Survey October 2014a

Welcome to the North Bristol Commuter Panel

Thank you for participating in our second survey!

The University of the West of England (UWE), Bristol, is conducting the study in partnership with South Gloucestershire and Bristol City Councils with funding from the Department for Transport.

Further information about the study can be found [here](#).

Travel Survey October 2014a

Your travel to work on a normal day

*** 1. What form of transport do you normally use to travel to work?**

- If you normally use more than one form of transport in the same trip (e.g. walk and bus), please tick the one you use for the longest distance.
- If you vary the way you travel to work, please select the form of transport you are currently using the most frequently. If you vary or combine different forms of transport, you will be able to tell us about this later in the survey.

- Car on my own
- Car with another person or people
- Motorbike/scooter
- Cycle
- Walk
- Public bus/coach
- Employer bus/coach
- Train
- Work from home
- Other

Other (please specify)

2. In the previous survey (to which you responded) you said you normally travelled to work by (alone). What reasons did you have for changing to '[Q1]'?

Please select any which apply and are relevant to your new form of transport.

- New method of travel is quicker
- New method of travel is more convenient
- New method of travel is cheaper
- New method of travel is more reliable
- New method of travel is better for the environment
- Change in parking arrangements
- Change in the weather
- Health benefits
- Health problems
- I found someone to car-share with
- I no longer have anyone to car-share with
- Colleagues/friends/family encouraged me to make this change
- I moved house or my place of work
- Change in family circumstances (e.g. child starting school)

Also - please explain in your own words the change you made to your travel to work, and why you made it.

Travel Survey October 2014a

Your views about your normal journey to work

3. How satisfied or dissatisfied are you with your journey to work on a typical day?

		Neither Satisfied Nor		
Very Dissatisfied	Dissatisfied	Dissatisfied	Satisfied	Very satisfied
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Travel Survey October 2014a

Your views about your normal journey to work

4. Please tell us what you think about your trip to work on a typical day, using your normal form of transport.

	Strongly Disagree	Disagree	Neither Disagree Nor Agree	Agree	Strongly Agree
My normal form of transport is reliable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My normal form of transport is convenient	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My normal form of transport is the quickest option	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My normal form of transport is the cheapest option	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My normal form of transport is safe	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My normal way of travelling is enjoyable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My normal form of transport is good for my health	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Travel Survey October 2014a

Your travel to work on each of the days you worked this week

Please tell us about your travel to work in the week 20th to 26th October. If you were absent that week (e.g. on holiday), please tell us about the week you returned to work.

5. What main form of transport did you use on each day you worked this week?

If you used more than one form of transport (e.g. walk and bus), please select the **one you used for the longest distance**. Please only one option per day.

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Car on my own	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Car with another person or people	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Motorbike/scooter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cycle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public bus/coach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employer bus/coach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Train	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Worked at home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did not work on this day	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other (please specify)

6. Did any of your journeys to work this week involve a secondary form of transport (e.g. walked to a bus stop or drove/cycled to a railway station)?

- No
- Yes

Travel Survey October 2014a

Your travel to work on each of the days you worked this week

7. What secondary form of transport did you use on each day you worked this week?

For example, if you walked to a bus stop or drove/cycled to a railway station, please select walk/car/cycle for the day/s you did this.

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Car on my own	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Car with another person or people	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Motorbike/scooter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cycle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public bus/coach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employer bus/coach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Train	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Worked at home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I did not work on this day	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I did not use a secondary form of transport on this day	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Travel Survey October 2014a

Your travel to work on each of the days you worked this week

*** 8. Were you based at a location other than your normal place of work on any day this week (excluding working at home)?**

- Yes
- No

Your travel to work on each of the days you worked this week

9. On which days was your main commute to a location other than your normal place of work?

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Working day	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please add a comment if you wish to expand on the above

Travel Survey October 2014a

Your awareness of transport measures in the area where you work

10. Are you aware of any of the following?

Please select any services you are aware of.

- TravelWest website <http://www.travelwest.info/>
- TravelWest bus checker app <http://www.travelwest.info/buschecker>
- Brompton hire bikes at Temple Meads rail station
- 'What's your Number?' bus advertising campaign

* 11. Have any of the above, or any other travel services or events, **influenced** the way you travel to work, or made you consider using a different form of transport?

Other services and events might include: the Big Commuting Challenge; Travel West Roadshows; Dr Bike Cycle repairs; Electric car charging points; Recent improvements to cycle routes; Recent improvements to cycle facilities where you work; Improved cycle parking at railway stations; Public bicycle pumps; Car-share 'pairing' services; Kings Ferry Commuter Coach Kings Ferry Business Shuttle; X18 bus service.

- Yes
- No

Travel Survey October 2014a

How transport measures have influenced the way you travel to work

12. Please tell us in the box below how any of the following services have **influenced you**:

- TravelWest website
- TravelWest bus checker app
- Brompton hire bikes at Bristol Temple Meads
- "What's your Number?" bus advertising campaign

If relevant, please also tell us how the following have influenced you. If you have already told us about these services/events in the previous survey, you do **not** need to repeat your comments.

The Big Commuting Challenge

Travel West Roadshows

Dr Bike Cycle repairs

Electric car charging points

Recent improvements to cycle routes

Recent improvements to cycle facilities where you work

Improved cycle parking at railway stations

Public bicycle pumps

Car-share 'pairing' services

Kings Ferry Commuter Coach

Kings Ferry Business Shuttle

X18 bus service

Travel Survey October 2014a

Change of circumstances

* 13. Have you changed your Employer since the previous survey?

- No
- Yes

* 14. Have you moved your work base to a different site of the same Employer since the last survey?

- No
- Yes

Travel Survey October 2014a

Your new place of work

15. What is the name of your new Employer?

16. What is the postcode of your new Employer?

Travel Survey October 2014a

Your new work base

17. What is the postcode of your new work location?

Travel Survey October 2014a

Change of circumstances

* 18. Have you moved house since the last survey?

- No
 Yes

New home postcode

19. Please tell us your new home postcode

Post code information will only be used for anonymous mapping purposes.

Travel Survey October 2014a

Change of circumstances

20. Have you obtained a driving licence since the last survey?

- No
 Yes

21. Have you gained or lost access to a car for your journey to work since the last survey?

- Gained access to a car
 Lost access to a car
 No change since the last survey

22. Have you gained or lost access to a bicycle for your journey to work since the last survey?

- Gained access to a bicycle
 Lost access to a bicycle
 No change since the last survey

Travel Survey October 2014a

Final comments

23. Please tell us here if you have anything else to add about your travel to work.

All comments made during previous surveys have been noted and are being carefully considered in our research. We would welcome any further comments you might now wish to add.

Data protection

24. Would you like to be entered into the prize draw?

Yes

No

The personal information collected in this survey will be processed by the University in accordance with the terms and conditions of the 1998 Data Protection Act. We will hold your data securely and not make it available to any third party unless permitted or required to do so by law. Your personal information will be used to contribute to the analysis of research results. All reporting of the research findings will be anonymous; under no circumstances will any individual be identifiable. Reports arising from the research will be in the public domain. Your personal information will be deleted at the end of the research project (May 2016).

* 25. I agree to the University processing my personal data as described above.

Yes

Appendix 15: Panel member interviews – topic guide

Telephone interviews with panel participants

Topic guide, 29/02/16

Introduction

- Reminder of purpose of research and links to panel survey (NB some background will have been provided by email during the recruitment of interviewees).
- We wanted to talk to you because your survey responses showed that you have sometimes travelled to work by car, and sometimes by bicycle, during the past two years. We are interested in finding out more about why people change between these ways of getting to work. In particular, we would like to hear your views about whether different measures to encourage cycling to work in recent years have influenced you at all.
- Ethics.
- Are you happy for the interview to be recorded?

Warm up questions

(intended as easy introduction before they are asked to think back over the past two years)

- Are you still working at?
- Can you tell me how you have been travelling to work since last October?

1. Reasons for mixing cycling and car driving

- Your responses to the panel survey suggest that you*(summarise their commute mode pattern)*. Is this accurate as far as you recall?
- Can you tell me what your reasons were for changes you made to the way your commute? *(check these correspond with survey responses)*

2. Cycling improvement measures

Research questions:

- *How far do local cycling improvement and promotion measures influence individuals' commuter cycling behaviour and attitudes, compared with the wider issues which influence the decision to cycle to work (e.g. factors within the personal realm and external factors such as workplace parking arrangements and payment regimes)?*
- *What is the perceived role of cycling measures in: starting cycling to work for the first time, maintaining cycling, encouraging more cycling for those that mix the modes they use. Are some types of measures thought to have a greater impact than others? If so, which are more/less effective?*

- *Are some types of measures more helpful than others at different stages (e.g. starting versus maintaining cycling)?*

Interview Questions

Thinking about local measures which have been taken to encourage cycling to work over the past few years...

- You commented during the survey that you had been influenced by..... *(paraphrase comment)*. Please can you expand on this?
 - Do you think it has influenced you to cycle any more than you would otherwise have done? Please explain why/why not.
 - *If survey comment cited an occurrence which discouraged cycling (e.g. roadworks), ask whether interviewee cycled more when the work was finished.*
 -
- In addition to that specific point, you said in your survey responses that you were aware of a variety of cycling improvement and promotion measures *(give examples of boxes ticked by this individual)*. Have any of them made any difference to your travel to work, directly or indirectly? Please explain which ones.

Depending on answer, probe following areas:

- Did it/they encourage you to start cycling to work for the first time?
 - Did it/they motivate you to carry on cycling when you might otherwise have stopped.
 - Did it/they encourage you to increase your cycling compared with other ways of travelling to work?
- - How much of an effect have these measures had on your commute, compared with the other reasons which have prompted you to cycle more, or cycle less, during the past two years? For example, you mentioned that.....*(refer to points raised in earlier question on reasons for change)*.
 -

3. 'Cycling culture' at work

Research questions:

Does employer support, or lack of support, for cycling affect staff morale? How important is support from colleagues? What factors contribute to a culture of cycling within a workplace?

- *Interview Questions*

- Do you think that cycling to work is considered normal where you work?
- Do you think that cycling is supported by your employer? (*Link to anything relevant said previously. Probe the ways they think it is, or is not, being supported*)
 - Why do you think cycling is/is not supported. What do are your views about this situation?
- What do you think that colleagues think about you cycling to work? How have/do their opinions affect you?

4. Concluding points

- Is there anything you would like to add?
- *Thank the interviewee for their help.*