

# Workplace travel plan guidelines

General travel planning know-how with a focus on travel to and from work



NZ TRANSPORT AGENCY  
WAKA KOTAHI

New Zealand Government

# Workplace travel plan guidelines

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# Document management plan

## 1) Purpose

This management plan outlines the updating procedures and contact points for the document.

## 2) Document information

Document name	<i>Workplace travel plan guidelines</i>
Document number (ISBN)	ISBN 978-0-478-36462-0 (online)
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Document owner	Ulrike Neumann
Document sponsor	Matt Barnes

## 3) Amendments and review strategy

All corrective action/improvement requests (CAIRs) suggesting changes will be acknowledged by the document owner.

	Comments	Frequency
Amendments (minor revisions)	Updates incorporated immediately they occur.	As required.
Review (major revisions)	Amendments fundamentally changing the content or structure of the document will be incorporated as soon as practicable. They may require coordinating with the review team timetable.	At least annually.
Notification	All users that have registered their interest by email to <a href="mailto:workplacetravelplans@nzta.govt.nz">workplacetravelplans@nzta.govt.nz</a> will be advised by email of amendments and updates.	Immediately.

## 4) Other information (at document owner's discretion)

There will be occasions, depending on the subject matter, when amendments will need to be worked through by the review team before the amendment is actioned. This may cause some variations to the above noted time frames.

## 5) Distribution of this management plan

Copies of this manual management plan are to be included in the NZ Transport Agency intranet at the next opportunity.

## Record of amendment

Amendment number	Description of change	Effective date	Updated by

# Contents

Document management plan .....	i
Record of amendment.....	ii
1.0 Background .....	1-1
1.1 Overview.....	1-1
1.2 Context.....	1-2
1.3 Benefits of travel plans .....	1-3
1.4 Travel planning process .....	1-6
2.0 Set-up phase - prerequisites of a travel plan .....	2-1
2.1 Overview.....	2-1
2.2 Senior management buy-in .....	2-2
2.3 Staff buy-in and involvement.....	2-4
2.4 Steering group.....	2-5
2.5 Travel plan coordinator .....	2-6
2.6 Scope and goals of the travel plan.....	2-7
2.7 Project plan and marketing strategy.....	2-9
2.8 A long-term approach.....	2-10
3.0 Data collection .....	3-1
3.1 Overview.....	3-1
3.2 Site and policy assessment .....	3-2
3.3 Staff travel survey .....	3-5
3.4 Business travel audit .....	3-6
3.5 Travel report.....	3-7
4.0 Action planning.....	4-1
4.1 Overview.....	4-1
4.2 How to develop an action plan.....	4-2
4.3 Setting goals and objectives.....	4-3
4.4 Action planning strategy.....	4-7

5.0	Measures and initiatives.....	5-1
5.1	Overview .....	5-1
5.2	Walking/running .....	5-2
5.3	Cycling .....	5-4
5.4	Public transport.....	5-8
5.5	Carpooling.....	5-12
5.6	Motorcycles/scooters.....	5-15
5.7	Carparking management .....	5-16
5.8	Reducing the need to travel .....	5-19
5.9	Business travel.....	5-22
5.10	Other strategies .....	5-24
6.0	Marketing and awareness raising .....	6-1
6.1	Overview .....	6-1
6.2	Changing habitual behaviour.....	6-2
6.3	Developing your marketing strategy.....	6-4
6.4	The tactical action plan.....	6-7
7.0	Implementation .....	7-1
7.1	Overview .....	7-1
7.2	Launch and implementation .....	7-2
7.3	Case study .....	7-3
8.0	Managing the momentum and monitoring .....	8-1
8.1	Overview .....	8-1
8.2	Maintaining the travel plan .....	8-2
8.3	Monitoring .....	8-3

# 1.0 Background

## 1.1 Overview

### At a glance

Travel plans can help counter car dependency and improve business travel efficiency by increasing opportunities for travel alternatives.

A travel plan will help **your organisation** run more efficiently by addressing transport-related aspects such as carparking, accessibility, business travel including vehicle fleet, and environmental performance. This can achieve substantial long-term cost savings for your organisation.

Benefits to **your staff** can include better health through more opportunities to build exercise into their daily lives, a better work-life balance and reduced cost of travel to work.

Travel plans also benefit **the community**, eg by reducing congestion and making local streets less dangerous, less noisy and less polluted. The local economy can benefit through staff having more money to spend when using their vehicles less.

Travel plans will generally follow the process below.

Step	Main tasks
Set-up	Gain management support, define the scope and set overall aims, develop a project plan.
Data collection	Conduct a staff travel survey, carry out site and policy assessments, conduct a business travel audit, prepare a travel report.
Action planning	Draft an action plan, set goals, objectives and targets, seek feedback from management and staff, finalise the action plan and get management sign-off.
Implementation	Launch the travel plan, implement the action plan, communicate successes.
Monitoring and maintaining the momentum	Maintain your initiatives, monitor targets, update initiatives for continuous improvement.

As a guide, it usually takes about a year from when you set up the workplace travel plan project to when you reach the monitoring and maintenance stage. This can vary considerably, depending on the available resources and project scope.

### In this chapter

Section	Page
1.1 Overview.....	1-1
1.2 Context.....	1-2
1.3 Benefits of travel plans .....	1-3
1.4 Travel planning process .....	1-6

## 1.2 Context

### Increasing car use

As a society, we depend increasingly on cars. The latest New Zealand household travel survey found that 80 percent of our travel time is spent in the car<sup>1</sup>.

While cars provide individuals with a flexible means of transport and an element of personal freedom, everyone, regardless of whether they are regular drivers, is affected by the economic, environmental and social externalities that increased car use produces.

For businesses, this can carry a cost through congestion (time lost, unreliable journey times), climate change (the cost of emissions trading) and poorer staff health due to illnesses linked to low levels of physical activity, eg obesity leading to more sick days.



For individuals, increasing car use can result in poorer health from pollution and noise, fewer opportunities for physical activity and the limitations severance imposes on communities.



Further facts and figures about increasing car use in New Zealand, its impacts and what travel plans can achieve are provided in Resource 1 ([www.nzta.govt.nz/traffic/businesses/toolkit.html](http://www.nzta.govt.nz/traffic/businesses/toolkit.html)).

### What is a workplace travel plan?

A workplace travel plan is a package of measures, initiatives and promotions aimed at developing and encouraging more travel choices for commuting and business travel.

Essentially, a travel plan, where possible and practical, will seek to reduce the amount we fly and drive (particularly single-occupant car trips) in favour of more walking, cycling, public transport and carpooling as well as smarter and more flexible ways of working.

Individually, a workplace travel plan helps to increase travel choice, providing staff with more options and flexibility about how and when they work. A successful travel plan will contain a mix of incentives and disincentives, eg promoting public transport, walking and cycling, while restricting carparking spaces.

A travel plan is a dynamic, evolving process that will grow and develop with the organisation. It is not a one-off event, but a continuous course of action that will enable both staff and the organisation to operate more efficiently.

<sup>1</sup> Ministry of Transport (2008) 'Comparing travel modes' in *Household Travel Survey* (v4, revised Jan 2008), 1-13, Ministry of Transport, Wellington. [www.transport.govt.nz/research/Documents/Comparing-travel-modesv1.4.pdf](http://www.transport.govt.nz/research/Documents/Comparing-travel-modesv1.4.pdf) (accessed 2 February 2010)

## 1.3 Benefits of travel plans

### Purpose of travel plans

A travel plan will look at ways to enable staff to travel to and for work more efficiently. Travelling more efficiently will ultimately result in fewer kilometres travelled.

Reducing the amount of car and air kilometres travelled will:

- reduce the social and economic impacts the car has on society as a whole
- produce financial benefits and improve productivity of the business
- save staff time and money
- benefit the environment.

What travel plans are not trying to achieve is to get people out of their cars immediately and forever, and it is important that the travel plan does not come across this way.

### Why should your organisation make a travel plan?

A travel plan helps your organisation run more efficiently by addressing transport-related aspects:

Aspect	Effect
Direct cost savings	<p>These can occur through reduced:</p> <ul style="list-style-type: none"> <li>• air travel costs through tele-conferencing</li> <li>• carparking costs, as there is less demand for parking space</li> <li>• company car costs through more efficient or reduced use</li> <li>• business travel costs through sharing trips or using public transport instead of taxis.</li> </ul>
Accessibility	<p>Reducing the number of vehicles entering and exiting the site by improving accessibility to alternative modes will:</p> <ul style="list-style-type: none"> <li>• alleviate congestion onsite and on local roads, particularly during the peak periods</li> <li>• improve punctuality and relieve stress</li> <li>• create a safer environment</li> <li>• potentially help with recruitment and retention.</li> </ul>
Efficient working practices	<p>Changing the working practices of the organisation can bring about efficiency benefits, eg:</p> <ul style="list-style-type: none"> <li>• Tele-conferencing such as video-conferencing can increase productivity by reducing unproductive time spent travelling.</li> <li>• Tele-working and flexible working practices increase work-life balance and productivity.</li> <li>• Using public transport can potentially allow staff to work while travelling as opposed to driving while travelling.</li> </ul>

Continued on next page

## 1.3 Benefits of travel plans continued

### Why should your organisation make a travel plan? continued

Continued from previous page

Aspect	Effect
Healthier workforce	<p>Travel plans can lead to a healthier workforce through:</p> <ul style="list-style-type: none"> <li>• better work-life balance</li> <li>• less stressful travel to work</li> <li>• more opportunities for walking and cycling, which have recognised benefits for heart health</li> <li>• greater allegiance with work by staff who try to live sustainably and who will value their organisation's travel planning efforts.</li> </ul> <p>The benefits to the organisation are:</p> <ul style="list-style-type: none"> <li>• enhanced staff retention and recruitment</li> <li>• less absenteeism and so fewer 'lost' days</li> <li>• more productive staff.</li> </ul> <p>Your human resources department can estimate how much staff turnover and sickness costs your organisation. This will give a financial context to benefits like staff retention, ie less cost to replace departed staff or reduced staff sick days through better health.</p>
Environmental performance	<p>Reducing travel and improving travel efficiency will:</p> <ul style="list-style-type: none"> <li>• reduce your organisation's environmental impact (eg carbon footprint)</li> <li>• demonstrate that the employer is environmentally aware and the organisation leads by example (good PR and community respectability)</li> <li>• demonstrate that the employer is forward-thinking and is taking a long-term strategic view.</li> </ul>

### Wider benefits of a travel plan

A travel plan will also bring a range of benefits to your staff and the community:

To whom	Benefits
Individuals	<ul style="list-style-type: none"> <li>• increase health, fitness and productivity</li> <li>• potential for greater work-life balance</li> <li>• provide less stressful options for travel to work</li> <li>• create opportunities to build healthy exercise into daily life</li> <li>• reduce journey times to work</li> <li>• reduce the cost of travel to work</li> </ul>
Community	<ul style="list-style-type: none"> <li>• make local streets less dangerous, less noisy and less polluted</li> <li>• reduce congestion</li> <li>• reduce journey times</li> <li>• reduce parking overspill into residential roads</li> <li>• enhance public transport</li> <li>• improve the environment and the routes available for walking and cycling</li> <li>• increase the amount of money flowing into the local economy through staff spending less on transport</li> </ul>

## 1.3 Benefits of travel plans continued

This table gives you an overview of the benefits of implementing a travel plan:<sup>2</sup>

Benefit	You, as an employer	Your staff	The local community/ environment	Comments
Cost savings	✓	✓		A travel plan can bring cost savings to both you and your staff, as travel becomes more efficient.
Increased productivity	✓			Healthier, happier workforce can increase staff productivity.
Reduced demand for onsite parking	✓			Reduced demand for parking enables land previously used for parking to be put to more profitable use.
Healthier workforce and reduced absenteeism	✓	✓		A healthier workforce is a more productive workforce.
Improve organisational image	✓	✓		Demonstrates your organisation's values. Good image valued by employees.
Improved site access	✓	✓	✓	Improved site access.
Reduced congestion	✓	✓	✓	Also benefits just-in-time operations/deliveries.
Reduced crashes	✓	✓	✓	Reduced trauma and cost savings.
Improved staff morale	✓	✓		Improved morale increases productivity.
Opportunity for staff networking	✓	✓		Carpooling and joint working in the course of travel plan development enables staff to socialise as well as discuss work-related issues.
Time savings	✓	✓	✓	Reduced time spent travelling enables more time for doing other things, eg leisure activities, work at the office.
Improved quality of life	✓	✓	✓	Time savings, reduced stress and improved health all lead to lifestyle improvements.
Reduced stress	✓	✓		Reduced stress means a healthier and more productive workforce.
More equal treatment of staff	✓	✓		Equal treatment of all staff improves morale.
Staff recruitment	✓	✓	✓	A travel plan can help create a more attractive recruitment package, as well as create a wider base of potential employees. It can also improve access to employment for the local community.
Improved local air quality	✓	✓	✓	Reduced traffic levels will result in less pollution, which will improve air quality in the local area.
Energy savings	✓	✓	✓	Energy savings bring cost savings as well as environmental benefits through reduced use of fossil fuels.
Improved public transport services	✓	✓	✓	Staff and local residents would benefit from any improvements made by your organisation to local bus services and enable non-car owners to become part of your potential workforce.
Reduced overspill parking into residential streets	✓		✓	Reduced demand for parking from staff will result in less overspill onto surrounding residential streets (improves image of your organisation).
Reduced noise			✓	Reduced traffic levels will result in lower noise levels in the local area.

<sup>2</sup> Energy Efficiency Best Practice Programme (2002) *A travel plan resource pack for employers*, EEBPP, UK; modified.

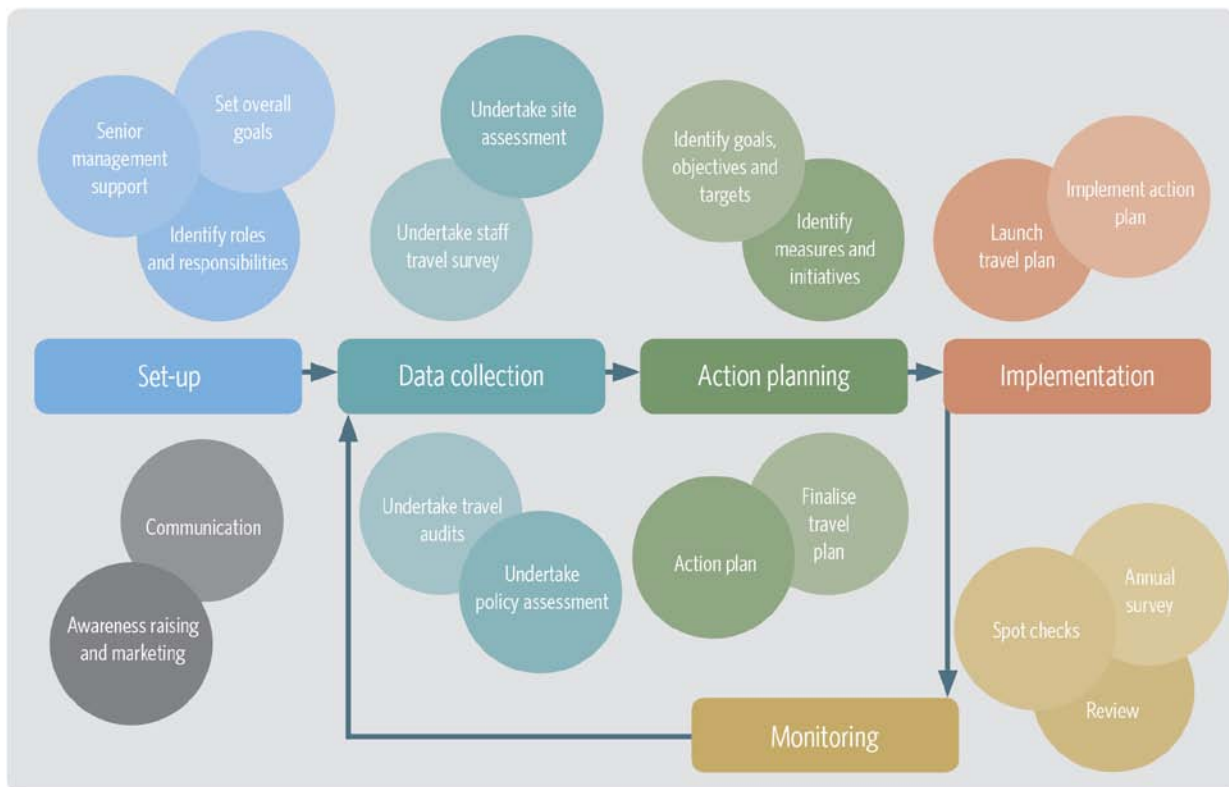
## 1.4 Travel planning process

### Process steps

A successful travel plan will generally follow a process of:

- set-up
- data collection
- action planning
- implementation
- monitoring and maintenance.

Each of these stages has various tasks that need to be completed in order to effectively progress to the next stage.



## 1.4 Travel planning process continued

### Basis for success – checklist

A 'good' travel plan will:

- have senior management support
- be based on current travel patterns but aim to form future travel behaviour
- have clear goals
- consist of a comprehensive package of measures
- have a dedicated travel plan coordinator
- provide opportunities for staff involvement
- have extensive, ongoing marketing
- have clear, SMART objectives and targets
- include a monitoring programme.

### Case study

#### Auckland airport<sup>3</sup> - 'Lift Auckland' travel plan

The expected growth in passengers and staff at Auckland Airport will place pressure on the roads and cause frustration for airport staff and passengers. With over 12,000 people working at the airport, the travel plan aims to encourage staff to think about getting to work differently and provides practical travel solutions.

Initiatives are:

- Carpooling - this is a scheme where people working at the airport and interested in sharing the journey to/from work can be matched informally, by word of mouth or through online software.
- Improvement of the Airbus service - a 15-minute frequency between the airport and the city centre, and generous staff discounts.
- Improvements to the eastern bus services to Botany via Middlemore train station.
- The introduction of an airport-Manukau City service - the Manukau service runs via the Papatoetoe train station providing a rail link to the airport.

The results of the 2009 follow-up survey confirm the success of the airport travel plan, with a 14 percent reduction in staff driving to work alone (achieved in just three years).



<sup>3</sup> [www.aucklandairport.co.nz/Corporate/Welcome-to-Lift/AboutLift.aspx](http://www.aucklandairport.co.nz/Corporate/Welcome-to-Lift/AboutLift.aspx) and [www.aucklandairport.co.nz/Corporate/Welcome-to-Lift/LiftNews.aspx](http://www.aucklandairport.co.nz/Corporate/Welcome-to-Lift/LiftNews.aspx) (accessed 3 December 2009)



## 2.0 Set-up phase – prerequisites of a travel plan

### 2.1 Overview

#### At a glance

The set-up stage aims to confirm the workplace's commitment to participate in the travel plan and kick off the project.

Management buy-in will be essential and can be gained by presenting the travel plan from a business point of view. Staff engagement can be ensured by consulting them and asking them to participate in mode groups.

A dedicated travel plan coordinator is needed to move the project forward.

During the set-up stage, you will define the scope of the travel plan and its aims. This will be specific to your organisation's needs and could focus on existing issues such as parking.

We recommend that you put together a project plan specifying milestones, responsibilities and budgets. A marketing strategy will help you to market your project to staff in a purposeful manner right from the start.

#### The set-up stage step by step

Step	Action
1	Gain management commitment to the travel plan
2	Gain staff buy-in
3	Establish a steering group and appoint a travel plan coordinator
4	Define the scope of the travel plan and its overall aims
5	Develop a project plan and marketing strategy for the workplace travel plan process

As a guide, the set-up stage usually takes 1-3 months.

#### Contents

Section	Page
2.1 Overview.....	2-1
2.2 Senior management buy-in .....	2-2
2.3 Staff buy-in and involvement.....	2-4
2.4 Steering group.....	2-5
2.5 Travel plan coordinator .....	2-6
2.6 Scope and goals of the travel plan.....	2-7
2.7 Project plan and marketing strategy.....	2-9
2.8 A long-term approach.....	2-10

## 2.2 Senior management buy-in

### Importance of management buy-in

Senior management buy-in is crucial to the success of the travel plan. They can:

- agree the resources, such as staff time and budgets, which are needed to implement the plan
- make the high-level decisions
- lead by example – it is important they create a ‘do as I do’ not ‘do as I say’ environment.

### Securing senior management buy-in

While it is likely that a senior manager may instigate the travel plan, buy-in of all senior managers needs to be secured at the initial stages of the travel plan development.

Initially, senior managers might be concerned about the costs of implementing a travel plan. Your organisation’s transport and travel costs can be significant though. Estimating the potential cost savings and efficiency gains in a business case will give you a clearer picture and help to gain buy-in from senior management.



Resource 2 contains guidance on constructing the business case for a workplace travel plan ([www.nzta.govt.nz/traffic/businesses/toolkit.html](http://www.nzta.govt.nz/traffic/businesses/toolkit.html)).

### Case study

#### Waitakere City Council<sup>4</sup> – savings on carparking

Carparks have an approximate construction cost of \$3500–\$4500 per parking space.

The council reduced carparking at Waitakere Central by 83 carpark spaces from what was originally required under the district plan. This was justified in part due to the proximity of the new building to passenger transport services and also the council’s commitment to implement a workplace travel plan (this became a resource consent requirement).

This resulted in a total saving to the council of \$290,000–\$374,000 (approximate cost only). Additional savings associated with the reduced parking include ongoing maintenance costs and the less tangible costs associated with lost land development potential. Car driving has been reduced from 89 percent to 71 percent.



<sup>4</sup> Waitakere City Council (2007) *Waitakere Central Workplace Travel Plan – Case study*, WCC, Auckland. [www.waitakere.govt.nz/AbtCit/ec/pdf/TravelPlanCaseStudy-Apr07.pdf](http://www.waitakere.govt.nz/AbtCit/ec/pdf/TravelPlanCaseStudy-Apr07.pdf) (accessed 16 March 2010)

## 2.2 Senior management buy-in continued

### Senior management presentation

It is a good idea to present to senior management, explaining what a travel plan is and how it can benefit the organisation. Here is a format that you could follow:

Slide	Content
1	Title slide
2	Set the scene - the context
3	What is a travel plan - definition
4	The need for a travel plan - specific to your organisation
5	Benefits of a travel plan - as employer, to staff, community and environment
6	Current travel costs - breakdown of current costs versus savings that can be made
7	Travel plan process - ongoing, staff resource, goals, timescales

### Demonstrating senior management support

It is important that staff know at the start of the process that management supports the travel plan project. This is usually done by having a senior staff member communicate to all staff the organisation's commitment and how senior management will themselves be trying to alter their travel habits wherever possible.



## 2.3 Staff buy-in and involvement

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### Buy-in from staff

Staff may be sceptical about the introduction of a travel plan, but their support is important if the travel plan is to deliver its potential.

Things to consider:

- The plan must be seen as fair across all levels within the organisation, as people's ability to change mode will vary.
- The organisation must demonstrate a serious commitment to the plan.
- Effective communication is vital to gaining staff buy-in, not just at the start of the process but on an ongoing basis, explaining the benefits and any changes that may occur from staff input.

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### How to involve staff from the beginning

Once the decision has been made to implement a travel plan, staff will need to be approached with the idea. The success of the travel plan hinges on their willingness to change their travel behaviour, so it's important to establish good communications with staff.

Circulars and email campaigns are effective, but perhaps the best way to get buy-in is through informal meetings to discuss:

- what is a travel plan
- reasons for developing one, explaining the benefits
- what the initial stages of the plan will involve
- how the plan will be organised.

This is a good opportunity to identify staff who are eager to help implement the travel plan, so that future tasks may be given to them.

It is important to build on initial interest in the travel plan, and maintain this interest once the travel plan is up and running.

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### Consultation

Consultation is a good way to keep staff involved throughout the travel plan project. It will also keep them informed of the process and allow them to make comments and provide feedback.

Feedback received from the consultation will enable you to develop the travel plan specifically for your organisation.

Consultation could be done by running informal meetings. All staff should be invited to these meetings so that everyone feels included.

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### Mode groups

Mode groups are usually groups of people who use the same mode for travel to work, and groups of people who travel on business. They can provide a support network to share ideas, eg bus user groups or cyclist groups.

You can use the feedback of these groups to inform the travel plan.

Barriers or conflict may arise between the groups. To avoid this, members could be encouraged to get involved in the more general meetings, eg consultation meetings.

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## 2.4 Steering group

### The role of the steering group

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The role of the steering group is to take the travel plan forward by:

- providing the management support required and making strategic decisions, eg agree revisions to company policy
  - steering the travel plan in the desired direction and addressing issues along the way
  - agreeing necessary funding
  - monitoring and reviewing progress and identifying realistic objectives
  - setting tasks, priorities and work programmes for the travel plan coordinator and providing/securing assistance as necessary
  - keeping key people informed of progress
  - ensuring the work of the travel plan is coordinated with other activities of the organisation
  - leading by example.
- 

### Members of the steering group

The group will need about five members and should include:

- a senior manager
- a manager from each key department
- the travel plan coordinator.

It is advisable to consult with the regional council (who are responsible for public transport) and the local council (who are responsible for infrastructure such as bus stops and cycling and walking facilities). They have the power to effect any changes external to the worksite.

During the initial stages of the travel plan, the steering group will meet quite frequently, but will tail off as the plan gains momentum. Meetings should be linked to milestones, eg to discuss the results of the survey.

It is important that the meetings are planned and prioritised. A standard process will help to speed things up and should include a set agenda, taking of minutes, clear action points and follow-up.

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## 2.5 Travel plan coordinator

### The role of the travel plan coordinator

The travel plan coordinator is the key driver behind the travel plan, and can determine the plan's success.

This person should:

- be a good communicator
- be able to move the plan forward across departmental boundaries
- demonstrate a commitment to efficient travel
- be able to lead by example.

The travel plan coordinator will be responsible for a large chunk of tasks within the process, with others possibly becoming the responsibility of other staff, eg facility managers.

Conversely, the role could be just coordinating people who run the different tasks and report progress to the coordinator. Whichever way, it is important that sufficient time is allocated, particularly if this role is to be combined with their existing role.

### Reporting level

Ideally, the travel plan coordinator should report to the managing director or CEO. Reporting to this level means the travel plan can be championed at Board meetings and other management groups. It also sends a message about how seriously the travel plan is being taken by the organisation.

### Budget allocation

A budget is required, either directly or indirectly through senior management, to cover travel surveys, publicity materials, etc and to implement the various initiatives.

Some travel plans can be designed to pay for themselves through achieved savings.



See Resource 2 for help constructing the business case ([www.nzta.govt.nz/traffic/businesses/toolkit.html](http://www.nzta.govt.nz/traffic/businesses/toolkit.html)).

### Case study

#### Inland Revenue Department –sustainability saves money<sup>5</sup>

For the 2008/09 year, Inland Revenue had a total budget of \$710,000 for sustainability and carbon-neutral initiatives. These initiatives were expected to achieve annual cost savings of over \$1,000,000 with a significant proportion coming from reduced travel costs.

Travel initiatives and savings included the following:

- Use of video-conferencing and technology to share documents online reduced domestic air travel kilometres by 13 percent and is expected to have made annual savings of \$600,000 (extrapolated from achieved savings of \$300,000 over a six-month period compared with the previous year).
- Purchase of seven Toyota Prius cars is expected to have made annual savings of \$4510 in petrol costs (based on petrol at \$1.575 per litre).

<sup>5</sup> Inland Revenue Department (2009) *Response to committee's supplementary questions*, received by the Finance and Expenditure Committee on 12 March 2009 .

## 2.6 Scope and goals of the travel plan

### Types of travel

A travel plan can address just about every type of travel that is associated with your organisation:

- travel to and from work
- business travel (eg meetings, intra-office travel)
- visitors travelling to your site for meetings, conferences, etc
- deliveries/contractors calling at your site
- fleet vehicles that may be employed as part of your organisation's functions.



### Scope of the travel plan

It is worthwhile to identify what is most appropriate for your organisation's needs and site characteristics. This will depend on the:

- size of the organisation
- location of the organisation
- nature of the business, eg amount of business travel, number of deliveries
- reasons why a travel plan is being developed
- staff attitudes towards different measures
- available resources.

Consulting within the organisation will have given a sense of how wide-ranging the scope of the travel plan should be. How far you choose to take the plan will depend largely on:

- the specific transport issues and needs in your work environment
- the resources and time available to take action
- the level of participation from staff and management.

Changes may be implemented over a period of months or years. In large workplaces, there may only be opportunities to implement travel plan actions within a limited number of departments or sites.

It can also be an option to link up with adjacent organisations and jointly develop a travel plan or jointly implement initiatives where cooperation will be beneficial.

## 2.6 Scope and goals of the travel plan continued

### Customising the scope of a travel plan<sup>6</sup>

You can customise the travel plan to your organisation's sizes and type:

	50 or fewer employees	50-300 employees	300 plus employees
Mainly office-based employees	Generic process can be very low key and informal. Consider focusing on one or two low-cost key initiatives or promotions that will impact positively on the business and directly benefit employees, eg measures to support walking and cycling.	Likely to be beneficial to form alliances with other organisations in the locality also developing a travel plan. Could focus on key cost-saving opportunities, such as business travel and reducing fleet expenses.	A full package of travel plan measures is likely to be required, with a dedicated travel plan coordinator. Larger organisations could consider working in partnership with transport providers and the local authority to offer new/enhanced services, infrastructure or Travel Demand Management (TDM) measures.
Employees mainly working outside/in workshops	Look into joining existing carpooling schemes, bicycle clubs, etc.	Likely to need consideration of cars as a 'tool of trade', ie for carrying equipment. Could be opportunities to promote carpooling. Could also consider promoting walking and cycling more as social activities, to improve staff health and fitness.	Dedicated employee buses may be appropriate. The travel plan is likely to need to consider transport and travel impacts on the local community.
Employees mainly working unsociable hours/shifts	Try and form alliances with other organisations developing a travel plan. Look into forming an area network with other organisations in your area to jointly develop travel plans.	May initially seem to be limited to opportunities to encourage people onto non-car forms of transport. Consider focusing on making access to public transport safer and easier. There may also be opportunities to promote carpooling (for those on matching shifts), but will need 'guaranteed ride home' support.	

### Goals of the travel plan

You should now be able to establish broad goals for your travel plan, eg:

- reduce business travel costs
- increase share of environmentally friendly commuter trips.

The content of the travel plan should not be thought about at this point. The content should be informed by analysing the data collected during the travel plan process. However, defining goals at this point, even if they change later, will help to establish the scope of the travel plan and communicate why your workplace is developing a plan.

<sup>6</sup> [www.pcal.nsw.gov.au/workplace\\_travel\\_plan/customising\\_to\\_your\\_needs](http://www.pcal.nsw.gov.au/workplace_travel_plan/customising_to_your_needs) (accessed 10 June 2010; modified)

## 2.7 Project plan and marketing strategy

### Developing a project plan

We recommend you put together a project plan for developing and implementing your workplace travel plan. This could be a simple spreadsheet or something more in-depth, depending on the complexity of your travel plan.

A project plan will typically include:

- project scope and goals
- timelines, including key dates for milestones
- responsibilities
- budget
- constraints and risks.

Milestones might include:

- introducing the idea of a travel plan to staff
- undertaking focus groups
- undertaking the staff travel survey
- launching the plan
- introducing new travel actions.



A template for a project plan is provided in Resource 3 ([www.nzta.govt.nz/traffic/businesses/toolkit.html](http://www.nzta.govt.nz/traffic/businesses/toolkit.html)).

### The marketing strategy

We recommend you prepare a marketing strategy that covers how to:

- publicise the travel plan to staff (what a travel plan is and why the workplace is creating one)
- encourage participation (to complete surveys and join in workshops and events)
- publicise the travel plan to external stakeholders.

The milestones in your travel plan are the best opportunities for marketing and raising awareness.



For more details about marketing and raising awareness, see chapter 6.



A template for a marketing strategy is provided in Resource 10 ([www.nzta.govt.nz/traffic/businesses/toolkit.html](http://www.nzta.govt.nz/traffic/businesses/toolkit.html)).

### NZTA resources

Templates for a project plan and a marketing strategy are provided in Resource 3 and Resource 10 ([www.nzta.govt.nz/traffic/businesses/toolkit.html](http://www.nzta.govt.nz/traffic/businesses/toolkit.html)).

## 2.8 A long-term approach

### Developing a strategy

Changing behaviour takes time. Answering the following questions will help you to devise an appropriate strategy to bring about change.

- What is going to motivate staff?
- Are senior management supportive?
- Are senior management leading by example?
- Does your organisation already have a good internal communications network?
- Does your organisation have a consultative style in its decision-making processes? If so, staff will be familiar with the kinds of processes involved. Again, introducing those in the travel plan development process can encourage similar practice in other areas of the organisation.
- Do you fully understand the various communications and decision-making channels in your organisation?
- Are environmental issues already of interest to your organisation? If they are, travel issues will be readily understood to be part of that.
- Do staff see themselves as responsible for their travel mode or is it seen as 'someone else's problem'? Your travel plan will need to consider attitudes and expectations.

### Looking for allies

A few ideas on where to look for allies:

- Identify key influencers in your organisation. They may not be the most senior, but they will be respected for their achievements. Enlist their enthusiasm.
- Identify and enlist support from people who have an 'environmental conscience'.
- Enlist the support of union representatives, if you have them.
- Identify if there are other areas of your organisation where changes are necessary or being made. Can you work together?
- In a large organisation, one or two departments may already have a culture that will make them more amenable to change. Focusing initially on them, and being able to demonstrate success there, is likely to make change easier elsewhere.

### Finding the right balance

It is important to be aware of the advantages and disadvantages of the measures that are being planned/introduced and be ready to put the counter-arguments forward.

If you can demonstrate that your organisation is genuinely interested in providing benefits for staff along with benefits for the organisation, they are more likely to respond favourably.

**Success is very attractive.** If staff see a successful initiative, they will be encouraged to join in.

And remember...

- be realistic about what can be achieved
- expect change to be slow
- expect change to be ongoing.

## 3.0 Data collection

### 3.1 Overview

#### At a glance

The goal of the data collection stage is to develop an understanding of the current travel behaviour of your organisation.

**Site** and **policy assessments** will help you to understand access and facility issues and if any policies contradict the aims of your travel plan. A **staff travel survey** and a **business travel audit** will give you an idea about how staff actually travel. Staff working groups will complement the results from your data collection.

This data, once compiled and analysed, will allow a **travel report** to be written. This should detail your organisation's particular transport issues and present your findings in a way that can be easily interpreted and used for the action planning.

The results of your data collection will also have to be communicated to management and staff.

#### The data collection stage step by step

Step	Action
1	Carry out a site and policy assessment
2	Hold staff mode groups
3	Conduct a staff travel survey
4	Conduct an audit of the travel for business purposes generated by the organisation
5	Compile and analyse the data
6	Prepare a brief travel report that shows current transport data, facilities serving the site, etc

As a guide, the data collection stage usually takes 1–3 months, depending on the size of your workplace and human resources.

#### Contents

Section	Page
3.1 Overview.....	3-1
3.2 Site and policy assessment .....	3-2
3.3 Staff travel survey .....	3-5
3.4 Business travel audit .....	3-6
3.5 Travel report.....	3-7

## 3.2 Site and policy assessment

### Site assessment

A site assessment looks at how easily a site can be accessed by different modes of transport, and at the onsite facilities, such as cycle parking, showers, tele-conferencing, etc. It is a crucial part of travel plan development.

A site assessment will enable you to:

- identify the barriers to non-car use and opportunities that could encourage and improve links to the site by environmentally friendly modes of travel
- formulate the types of questions that can be asked in the travel survey.

### Site checklist

What to look for in a site assessment:

Topic	Things to consider
General	<ul style="list-style-type: none"> <li>• How many people are employed at your site?</li> <li>• What are your operating hours?</li> <li>• Where are your entrances, and how many are there?</li> </ul>
Pedestrian access	<ul style="list-style-type: none"> <li>• How many routes to and from the site?</li> <li>• Are they pleasant and in good repair?</li> <li>• Are they close to common destinations and facilities, such as banks, post office?</li> <li>• Does the area feel safe?</li> </ul>
Cycle access	<ul style="list-style-type: none"> <li>• How many routes to and from the site?</li> <li>• Are they in good repair and conducive to cycling?</li> <li>• What are the cycle parking facilities?</li> </ul>
Public transport	<ul style="list-style-type: none"> <li>• What services are available?</li> <li>• What are the operating hours and fares?</li> <li>• Where are the stops/stations located?</li> <li>• Are they pleasant to access and use?</li> </ul>
Motorcycle access	<ul style="list-style-type: none"> <li>• Are there motorcycle parking facilities?</li> </ul>
Shower facilities	<ul style="list-style-type: none"> <li>• Are showers, lockers and dryers provided?</li> </ul>
Vehicle access	<ul style="list-style-type: none"> <li>• Is parking provided?</li> <li>• Is public carparking available nearby?</li> <li>• Are there parking charges?</li> </ul>
Transport and parking issues	<ul style="list-style-type: none"> <li>• Are there congestion problems around the site?</li> <li>• Are there any specific operational issues (eg access for delivery vehicles)?</li> <li>• Are there safety issues?</li> </ul>
Tele-conferencing	<ul style="list-style-type: none"> <li>• Is telephone, video and web conferencing available?</li> </ul>
Information and communication	<ul style="list-style-type: none"> <li>• What are your internal communications channels?</li> <li>• Is transport information provided to staff and visitors?</li> </ul>

## 3.2 Site and policy assessment continued

### Formulating potential initiatives

By identifying each of the above, it will be possible to start formulating what sort of initiatives could be put in place. For example, if there is free parking provided, it will be difficult to influence employees' travel away from the car, regardless of the other modes available. However, imposing some form of parking control can lead to a shift away from the car.

### Staff working group

Once the site assessment is complete, it is a good idea to consult with a small cross section of staff. This will help to highlight any obstacles of travelling to the site by sustainable means that may have been missed.

For example, it may be that the site has a perimeter fence around it with only one entrance. By creating a new entrance in this fence, you may encourage walking as staff no longer have to walk the extra distance to the original entrance.

You can also run mode groups with staff using a particular mode of travel (eg walking) to complement your site assessment and travel survey.

### Policy assessment

To develop the travel plan, a full understanding of the organisation's policies is needed, as these can greatly influence employees' travel habits.

Some policies may already encourage sustainable or efficient travel, while others will act as barriers and undermine the travel plan. Your travel plan should include initiatives that strengthen the policies that support the aims of your travel plan, and look to remove the policies that work against these aims.

While most travel plans will be put into place at existing sites, it is worth noting if the organisation has a relocation policy seeking new sites with good access for all modes. It is easier to gain a more sustainable pattern of travel where there are travel alternatives, rather than trying to reduce traffic at a car-dependent site.

### Policy checklist

What to look for in a policy assessment:

Topic	Things to consider
Vehicles and parking	<ul style="list-style-type: none"> <li>• use and availability of company and fleet cars</li> <li>• carparking allocation</li> <li>• mileage allowances</li> </ul>
Business travel	<ul style="list-style-type: none"> <li>• policies for preferred modes of travel</li> <li>• use of tele-conferencing</li> <li>• air travel, taxi and rental car travel, airport transfer</li> </ul>
Recruitment and relocation	<ul style="list-style-type: none"> <li>• what staff are told when joining the organisation</li> <li>• relocation policy</li> </ul>
Working arrangements	<ul style="list-style-type: none"> <li>• flexitime</li> <li>• compressed work week</li> <li>• working from home</li> </ul>
Encouragements for active and shared modes	<ul style="list-style-type: none"> <li>• guaranteed ride home</li> <li>• subsidised public transport tickets</li> <li>• allowance for walking and cycling equipment</li> </ul>

## 3.2 Site and policy assessment continued

### Influencing policy

By assessing policies, you will identify if your organisation's policy framework supports efficient travel choices, and start to address unhelpful policies. For example, if company cars are provided as part of salary packages, it is difficult to influence employees' travel away from the car, regardless of other mode availability. However, a cash alternative may encourage a shift away from the car.

Your site may be part of a large, multi-site organisation, with national policies that affect travel and transport issues. In this case, it is important to consider how much autonomy your site has in relation to the organisation, and what can and can't be changed at your site.

You may need to address policy changes with head office personnel/management. Head office should be encouraged to develop a travel plan and lead by example.

### Recording the results of site and policy assessments

Once these assessments are completed, it is useful to record the results detailing the findings and any issues raised. This can act as a useful document throughout the course of the travel plan development.

### NZTA resources

Generic templates for site and policy assessments are available in Resource 4 and Resource 5 ([www.nzta.govt.nz/traffic/businesses/toolkit.html](http://www.nzta.govt.nz/traffic/businesses/toolkit.html)). You can use these templates to guide you through your assessments. You can modify the templates to meet your needs.



### 3.3 Staff travel survey

#### Staff travel survey

The staff travel survey is the foundation of a travel plan. It will provide:

- numerical data on the current travel patterns of staff
- reasons why they travel the way they do
- information about what would be needed to help them travel differently.

The data also provides a baseline against which the success of the travel plan can be monitored.

The survey will also help to raise staff awareness of the travel plan, and allow them to help formulate the travel plan.

#### NZTA workplace travel survey

The NZTA has developed a workplace travel survey that will enable your organisation to formulate a travel plan. The survey can be customised to suit your organisation's culture, characteristics and goals. Survey results will be provided as a simple report consisting of tables and charts, and as raw and cleaned data in an Excel spreadsheet.

To request the survey, please email us at [workplacetravelplans@nzta.govt.nz](mailto:workplacetravelplans@nzta.govt.nz).

More detailed guidance about the workplace travel survey and staff travel surveys in general is available in Resource 6 ([www.nzta.govt.nz/traffic/businesses/toolkit.html](http://www.nzta.govt.nz/traffic/businesses/toolkit.html)).



## 3.4 Business travel audit

### Business travel audit

Business travel can form a large part of an organisation's overall travel and can amount to a significant expense. This is particularly important for government organisations, as business travel is a sensitive expenditure.

Additionally, if an organisation's overall goal is to reduce its carbon footprint, it will be necessary to collect information on all forms of travel made by its staff.

The business travel audit can be supplemented by a staff travel survey. The NZTA workplace travel survey contains a section on business travel for this purpose.



Detailed information on how to carry out a business travel audit is provided in chapter 3 of the *Business travel efficiency guidelines* ([www.nzta.govt.nz/traffic/businesses/toolkit.html](http://www.nzta.govt.nz/traffic/businesses/toolkit.html)).



### NZTA resources

A generic template for a business travel audit can be downloaded from the NZTA's website in Resource 7 ([www.nzta.govt.nz/traffic/businesses/toolkit.html](http://www.nzta.govt.nz/traffic/businesses/toolkit.html)).

To request the workplace travel survey, please email us at [workplacetravelplans@nzta.govt.nz](mailto:workplacetravelplans@nzta.govt.nz).

Guidance about the workplace travel survey is available in Resource 6 ([www.nzta.govt.nz/traffic/businesses/toolkit.html](http://www.nzta.govt.nz/traffic/businesses/toolkit.html)).

## 3.5 Travel report

### Presenting your travel data

It is important to communicate the results of the data collection, particularly the staff travel survey. This allows staff to feel part of the travel plan, and highlights why change needs to be made.

A **travel report** should be written at this point that details the transport issues identified in the data collection phase. The goals of the travel plan can be easily altered at this stage if a more pressing problem has been identified.

The travel report should organise the data so it can be easily interpreted and used by the working group to develop an **action plan**. The report does not need to be a formal document. The depth of the report should be appropriate to the size of the workplace and the complexity of the transport issues.

We suggest the following report format as a guideline:

Topic	Contents
Introduction	Outline of the report's purpose, how the data was gathered and the survey response rates.
Modes of travel	Summary of the various modes of travel and percentage of people using these (graphs are an effective way of presenting this information).
Issues	Summary of road safety concerns (eg danger spots), onsite facilities, policy improvements, etc.
Potential action point	Suggested list of issues for the working party to discuss and recommend actions for.

This information can be conveyed via email, company newsletter or a special results leaflet, and should welcome feedback from staff.

### Actions

From all of the information gathered, it may be obvious that some actions can be taken immediately that will improve the current situation.

For example, the site may be well served by public transport, but the feedback from staff shows a lack of use. To improve this, you may decide to put up posters and timetables throughout the site that promote the services.

Issues such as overgrown foliage on footpaths and cyclepaths may have been identified, which can easily be cleared to encourage these modes.

Some actions will take longer to achieve and will form the basis of the action plan.



Possible measures and initiatives are presented in chapter 5.

### NZTA resources

A template for a travel report is provided as a section in the 'Workplace travel plan template' in Resource 8 ([www.nzta.govt.nz/traffic/businesses/toolkit.html](http://www.nzta.govt.nz/traffic/businesses/toolkit.html)).



## 4.0 Action planning

### 4.1 Overview

#### At a glance

The objective of the action planning stage is to develop an **action plan** addressing the identified issues of your organisation, including objectives related to the goals of your travel plan project.

From the travel report, you can identify your organisation's priority issues. You can then explore possible solutions using education, promotion and enforcement through policies and strategies. Based on the results of your data collection, you will also be able to **set objectives** and **targets** related to your travel plan's goal.

Holding staff workshops at this stage will keep staff involved and get their support for the action plan. Staff feedback will also help you to tweak your action plan and objectives. It is also a good idea to seek management feedback.

The action plan document is then ready to be drafted. The draft should be circulated throughout your organisation to enable staff to have their say. Once the action plan document has been finalised, it should be signed off by management to ensure their commitment.

#### The action planning stage step by step

Step	Action
1	Begin formulating an action plan and develop objectives
2	Hold workshops with staff to explore potential actions and objectives
3	Finalise the action plan and the objectives
4	Seek feedback from management, staff and other key stakeholders (eg council) if required
5	Write the draft workplace travel plan document
6	Circulate the draft travel plan document to staff for feedback
7	Finalise the travel plan and get management sign-off

In New Zealand, coordinators have found the working group usually needs to meet 2-4 times over a couple of months to discuss the data and develop an action plan. This may take longer if issues or solutions require further technical input or are complex.

Section	Page
4.1 Overview.....	4-1
4.2 How to develop an action plan.....	4-2
4.3 Setting goals and objectives.....	4-3
4.4 Action planning strategy.....	4-7

## 4.2 How to develop an action plan

### Draft an action plan

Once the data has been collected and analysed, the working group should:

- identify and agree the priority issues that face your organisation
- explore all possible solutions using engineering, education, promotional, enforcement and policy strategies.

You can now begin to draft an action plan and set related objectives.

### Conduct staff workshops

A good way to keep staff informed and gain further buy-in from them is to hold workshops. These provide an opportunity to:

- convey the results of the survey
- remind staff of why your organisation is implementing a travel plan
- explain what the main issues are that need to be addressed
- discuss possible solutions and objectives.

If you already have drafted an action plan and objectives, you can ask staff if they feel that the suggested initiatives are appropriate and the objectives achievable and realistic. As an alternative, you can ask staff to set their own initiatives and objectives from scratch.

It is beneficial to hold break-out groups so that staff can discuss what they feel are the best solutions to the problems. If they come up with solutions, they are more likely to embrace them when they are implemented.

### Finalise the action plan and travel plan document

From the workshops, you will have the information needed to finalise your action plan.

The action plan should identify the goals and the objectives that will contribute to achieving these goals, along with the initiatives that will be implemented, by who, by when, their cost (ie low, medium, high) and the timescale.

From the finalised action plan, you will be in a position to draft your travel plan document. The draft should be made available to staff for feedback. However, at this point there should not be sweeping changes made to the document before it is finalised.

### NZTA resources

A template for a travel plan document is provided in Resource 8 ([www.nzta.govt.nz/traffic/businesses/toolkit.html](http://www.nzta.govt.nz/traffic/businesses/toolkit.html)).

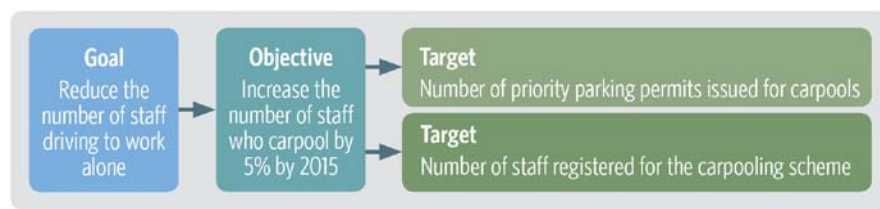
## 4.3 Setting goals and objectives

### What are goals, objectives and targets

Based on the results of the data collection and analysis, you will need to set the goals, objectives and targets of your travel plan.

Function	Description						
Goals	<p>These are the high-level aims of the travel plan. The goals give the plan direction and provide the focus for the plan.</p> <p>The goals will have been set at the outset of the travel plan and are likely determined by the site and the motivations behind the development of the travel plan.</p> <p>Depending on the results of the data collection stage, the goals may slightly alter from the original aims set down for implementing the travel plan.</p>						
Objectives	<p>These are measurable and enable you to gauge whether the goals have been achieved.</p> <p>Objectives can be quantifiable or non-quantifiable:</p> <table border="1"> <thead> <tr> <th>Function</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Quantifiable objectives</td> <td> <p>These are important to enable you to measure the effectiveness of the measures put in place in the travel plan.</p> <p>Examples: increase bus use from 6 percent to 10 percent over 5 years, reduce the number of flights taken by 15 percent over 3 years.</p> <p>Quantifiable objectives are harder to achieve and monitor, as it can sometimes be difficult to set realistic and achievable objectives.</p> </td> </tr> <tr> <td>Non-quantifiable objectives</td> <td> <p>Some objectives will not be quantifiable in that they are action objectives that need to be achieved.</p> <p>Examples: set up a carpooling database, upgrade the shower facilities.</p> </td> </tr> </tbody> </table>	Function	Description	Quantifiable objectives	<p>These are important to enable you to measure the effectiveness of the measures put in place in the travel plan.</p> <p>Examples: increase bus use from 6 percent to 10 percent over 5 years, reduce the number of flights taken by 15 percent over 3 years.</p> <p>Quantifiable objectives are harder to achieve and monitor, as it can sometimes be difficult to set realistic and achievable objectives.</p>	Non-quantifiable objectives	<p>Some objectives will not be quantifiable in that they are action objectives that need to be achieved.</p> <p>Examples: set up a carpooling database, upgrade the shower facilities.</p>
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Targets	<p>These are what need to be monitored in order to determine if your objectives have been hit and the goal achieved. They need to be measurable and quantifiable.</p>						

### An example of goal, objective and targets



## 4.3 Setting goals and objectives continued

### Setting objectives

Various objectives can be set against the information gathered through the survey and the business travel audit. To arrive at these objectives, you could assess these opportunities (eg what staff stated they would do in the travel survey) against the effort and resources that the organisation can commit to them.

Objectives should include aims for:

- short term (1 year)
- medium term (1-3 years)
- long term (3+ years).

The short and medium objectives serve as interim objectives to be hit to ensure the five-year objective is achieved. They also help to incorporate small shifts in individuals' travel behaviour to more sustainable modes, while maintaining current levels of sustainable travel.

All objectives should be SMART:

- Specific
- Measurable
- Achievable
- Realistic
- Time-bound

Responsibilities need to be clearly defined for each objective. It may be useful to give line management travel plan objectives, thus helping to enhance communication into the management structure.

### Overall objectives

The overall objective should be expressed in terms of reducing car driver trips, particularly single-occupant trips. Possible objectives can relate to:

- the number of cars arriving per 100 employees (this gives the added bonus that you can judge the progress over time even if staff numbers increase or decrease)
- the number of car trips taken per week
- the kilometres travelled by car per week.

It is advisable to look at the car trips or kilometres travelled **per week** rather than the 'main travel mode'. Trips or kilometres per week will more accurately indicate smaller changes, eg a staff member having changed from driving five times a week one year to driving four days and cycling one day per week in the following year.



For information about setting objectives for business travel, please see chapter 4 of the *Business travel efficiency guidelines* ([www.nzta.govt.nz/traffic/businesses/toolkit.html](http://www.nzta.govt.nz/traffic/businesses/toolkit.html)).

## 4.3 Setting goals and objectives continued

### Objectives for different modes

As well as basing the objectives on staff's stated preference from the survey, it is possible to make assumptions by plotting people's home location and mode currently used against their ability to access the site via other modes. For example, a bus route may pass a large section of staff, and from this you may estimate how many may convert to the bus.



However, you need to consider that some people will have reasons why they cannot or do not want to change from a particular mode, eg they may not live within easy walking distance or there is an infrequent bus service.

### Setting targets for monitoring purposes

It is a good idea to start thinking about suitable targets to monitor the progress of your travel plan against its objectives early on. Targets should be set that are clearly linked to these objectives, and it is important that they are SMART.

You could set targets relating to the results of your data collection, or use other suitable means, eg the uptake of initiatives such as a carpooling programme and the number of staff registered for it.



For more information about monitoring, please see chapter 8.

### Changes that can affect objectives

Organisational changes, such as an increase or decrease in staff numbers or a relocation of a site, will affect some of the objectives that have been put in place.

A relocation of a site may mean a whole re-vamping of the objectives if there is likely to be a modal share shift. For example, a site relocating from a city centre to the outskirts of town may see an increase in car use, as there may not be the public transport options.

However, a relocation is also a good opportunity to put in place restrictions (such as carparking management) and improved public transport links (such as a dedicated staff bus)

Local transport changes can also affect objectives as they will affect how easy it is to travel to the site.

## 4.3 Setting goals and objectives continued

### Case studies

#### Fisher & Paykel, Dunedin<sup>7</sup>

The company's Mosgiel site (120 staff) relocated to Dunedin in 2009. Prior to the move, a travel survey was conducted to get staff thinking about their travel options to the new site. A range of measures was then implemented to support sustainable travel.

Measures included:

- installing lockers, six showers, and secure and weather-proof parking for up to 40 bikes
- setting up an informal network of cyclists to help with cycle repair and maintenance, and occasional 'bike buses' for less confident cyclists
- promoting Walk2Work Day and Bike Wise, with the site coming first in the Bike Wise Battle 2009 and the Bike Wise Challenge 2010 in the Otago region
- providing public transport timetables
- setting up a carpooling register prior to the relocation, with 7-8 carpools having been formed.

After the relocation, the survey was repeated and showed:

- a drop of one-third in the average distance travelled to work (down from 15km before the relocation to 10km afterwards)
- an increase in walking, cycling and bus use (up from a total of 12 percent trip share before the relocation to 51 percent afterwards)
- a drop in car use (down from 85 percent trip share before the relocation to 47 percent afterwards).



### A continuous process

The travel plan process is one of continuous action-monitoring-review, and by setting goals, objective and targets, you are able to monitor change. If change is not being achieved, reviewing the plan will give you the opportunity to change those elements that have not worked to ones that do.



For more details about monitoring, see chapter 8.

<sup>7</sup> Fisher & Paykel, by email and in person.

## 4.4 Action planning strategy

### A package of measures

A successful travel plan will adopt a package of measures that will be aimed at:

- making alternatives more attractive to individuals than driving alone
- reducing the need to travel.

This package of measures will be arrived at from the staff survey and the various assessments that have taken place across the organisation.

Since people will react differently to the measures that are put in place, a combination of measures should be introduced that is broad enough to allow individuals to pick and mix which measure is best for them.



Chapter 5 has possible measures and initiatives that you could include in your action plan.

### 'Carrots' and 'sticks'

It is best if the package contains both 'carrots' (incentives) and 'sticks' (disincentives).

Things to consider:

- There should be a combination of incentives (such as increased cycle facilities) and disincentives (such as carparking management).
- It is important to get as many of the incentives in place prior to implementing disincentives to get people more supportive of the travel plan, and to give them the opportunity to make a change, before forcing it on them.
- The most popular and efficient measures identified in the staff survey should be implemented first (eg if most staff live over 5km away, cycling initiatives may not be the most cost-efficient or beneficial ones to put in place).

### Quick wins

It will inspire confidence in the plan if people can see immediate results early on. Here are some examples of initiatives that are easy to implement and low cost:

- provide information about how to get to your site on your organisation's intranet
- make public transport timetables available at your site
- provide walking and cycling maps
- support national initiatives, eg Bike Wise and Walk2Work Day
- promote the benefits of active and shared transport
- publicise stories of staff who already use active and shared modes to travel to work.

### Long-term change

The majority of measures within the travel plan will be aimed at long-term changes in people's travel behaviour. Such changes can be quite small and will take time:

- The change may be from someone who drove five days a week and who now substitutes one day with cycling every other week.
- It may take up to a year for some initiatives to reach their full potential, eg staff using the bus instead of the taxi for local business trips.

## 4.4 Action planning strategy continued

### Promotion

Whatever initiatives you implement, it is vitally important that you promote what you have done and what has been achieved. Promotion needs to be ongoing to reinforce the message of using transport alternatives to driving alone, and to show your organisation's commitment.



For more information about marketing and awareness raising, see chapter 6.

### Tax implications

Some initiatives may be subject to fringe benefit tax (FBT). If you have concerns about tax implications, contact Inland Revenue on 0800 377 772 for initial queries. You may then be requested to write to Inland Revenue for further clarification regarding your FBT obligations.

### Case study

#### Victoria University of Wellington<sup>8</sup> - 'Vic Commute' travel plan

A travel plan was introduced in 2008 to better meet the needs of commuters and to promote sustainable transport. The travel survey revealed that, of all the transport modes, public transport has the greatest chance of the attracting greater usage, followed by walking and carpooling.

A package of measures was implemented comprising both 'carrots' and 'sticks':

- The bus service has been improved, with increased frequency and more direct routes from the suburbs.
- A new walking map has been produced for the university, showing pedestrian shortcuts around the campuses.
- The university has joined Let's Carpool, the regional council's carpooling scheme for Wellington.
- Prices for staff carparking are being increased over a three-year period to reach 50 percent of market value by 2011.



<sup>8</sup> [www.victoria.ac.nz/fm/services/vic-commute.aspx](http://www.victoria.ac.nz/fm/services/vic-commute.aspx) (accessed 1 December 2009)

## 5.0 Measures and initiatives

### 5.1 Overview

#### At a glance

A wide range of initiatives can be employed to achieve the goals and objectives of your travel plan.

Measures can include:

- education and information (eg provision of bus timetables)
- schemes and events with active staff involvement (eg carpooling, cyclist skills training, events such as Walk2Work Day)
- facility improvements (eg showers and lockers, good lighting)
- incentive schemes (eg prize draw for all users of sustainable modes)
- disincentive schemes (eg reduction in carparking provision).

This chapter provides you with detailed information that will help you to choose and implement the appropriate measures for your organisation's travel plan.

#### Important

Some initiatives may be subject to fringe benefit tax (FBT). If you have concerns about tax implications, contact Inland Revenue on 0800 377 772.

#### Contents

	Section	Page
5.1	Overview.....	5-1
5.2	Walking/running.....	5-2
5.3	Cycling.....	5-4
5.4	Public transport .....	5-8
5.5	Carpooling.....	5-12
5.6	Motorcycles/scooters .....	5-15
5.7	Carparking management .....	5-16
5.8	Reducing the need to travel.....	5-19
5.9	Business travel .....	5-22
5.10	Other strategies.....	5-24

## 5.2 Walking/running

### Why walk?

Walking is best suited to people who live within 2 to 2.5 kilometres of the site.

Walking on an individual basis is an excellent mode of transport, in that it is free and an easy way of keeping fit and provides a reliable travel time.

---

### What you can do to encourage walking/running

A few ideas of how you can encourage walking:

- Promote walking to work as a way to build healthy exercise into everyday life.
  - Buy pedometers in bulk. Some people find it encouraging to use a pedometer to measure how far they have walked, and if they've done the recommended daily physical activity.
  - Organise lunchtime walks to encourage a culture of walking.
  - Join national and local walking events such as Walk2Work Day.
  - Provide walking maps to staff and visitors, and include them in induction packs for new staff.
  - Provide incentives for walking, eg entry into a prize draw. Incentive schemes should reward all users of alternatives to driving alone, but, nevertheless, it is possible to give a walking incentive and market it in a targeted way, eg with a walkers' breakfast.
- 

### On your site

What you can do onsite:

- Provide showers, changing rooms and lockers for staff, and drying facilities for wet weather gear.
  - Install pedestrian entrances to your site.
  - Clearly mark pedestrian shortcuts and routes on your site.
  - Design pedestrian routes on your site segregated from traffic, nicely landscaped and with pedestrian priority crossings if necessary.
  - Install good lighting, cut back vegetation or re-align paths to ensure good visibility.
- 



## 5.2 Walking/running continued

### Outside your site

Outside your site, you will need to work with the local council to address issues about pedestrian routes and access.

Criteria for walking routes:

Criterion	Routes should:
Convenience	<ul style="list-style-type: none"> <li>• be direct and reflect desire lines</li> <li>• be well signed</li> <li>• have conveniently placed crossings (not underpasses!) at main roads and intersections</li> </ul>
Safety	<ul style="list-style-type: none"> <li>• be safe and feel safe</li> <li>• have vehicle speed limits appropriate to the surroundings</li> <li>• have road layouts that encourage traffic to slow down and obey speed limits</li> <li>• be of high personal security</li> </ul>
Accessibility	<ul style="list-style-type: none"> <li>• link key destinations and connect with other routes</li> <li>• be continuous</li> <li>• enable unhindered movement</li> </ul>
Attractiveness	<ul style="list-style-type: none"> <li>• be well lit and surfaced</li> <li>• have a wider pavement or be behind a verge or planters if along main roads or highways</li> <li>• be pleasant to use and encourage active travel</li> </ul>



### Case study

#### Canterbury District Health Board, Christchurch<sup>9</sup>

The Community and Public Health Service has run walking promotions while developing a travel plan for their site. This included a breakfast celebration for those who had walked or used other sustainable modes of transport on Carfree Day 2008, and participation in Walk2Work Days.

At the Princess Margaret Hospital, Walk@Work was promoted to coincide with Walk2Work Day, encouraging staff to take the stairs instead of the lifts.

All promotions achieved a very good response and positive feedback from staff.

### Useful links

Walking information can be found on the NZTA's website at [www.nzta.govt.nz/traffic/ways/foot/index.html](http://www.nzta.govt.nz/traffic/ways/foot/index.html).

<sup>9</sup> Community and Public Health Service, Christchurch, by email.

## 5.3 Cycling

### Why cycle?

Most people who do or would cycle are likely to live within 7–8 kilometres of work, although there will be some who are willing to travel further.

Like walking, cycling to work is a great way for staff to get regular exercise and have a reliable travel time.

### What you can do to encourage cycling

A few ideas to encourage cycling:

- maps and information about the local cycle network
- provision of, or payment for, cycle maintenance
- discounted or free staff cycles
- training for staff who are not confident cyclists
- a staff bicycle user group (BUG)
- incentives for cycling, eg entry into a prize draw, a 'cash-out' payment for each day cycled or shorter hours – eg 10 minutes a day
- participation in national and local cycling events such as Bike to Work Day.



It is important that the overall goal for cycling should be to make it a mode of transport that staff will use on an everyday basis, not just those who are keen.

### On your site

**Cycle parking** is essential to enable staff to cycle to work.

The purchase of a cycle can be expensive, and the lack of safe, secure, covered cycle parking can be a deterrent. Good facilities will show that cycling is highly valued, as opposed to cycle parking being tucked away at the bottom of poorly lit carparks.

Cycle parking should be:

- in a prominent location at the entrance of the building
- well lit, safe and secure
- well designed.

Cycle parking can provide a quick win in the range of measures available in the travel plan.

The provision of **showers and lockers** is equally important. Things to consider:

- If possible, the changing, locker and shower facilities should be close by.
- It is a good idea to provide ironing and drying facilities.
- Also consider staff who walk/run or use a motorcycle/scooter when developing these facilities, as they will use them.

## 5.3 Cycling continued

### Outside your site

A barrier to increased cycle usage will be a lack of safe cycle routes, which can include not just road safety, but personal security, eg a cycle route down an enclosed alley. If there are such barriers, talk with your local authority to identify potential solutions.

Criteria for cycling routes:

Criterion	Routes should:
Convenience	<ul style="list-style-type: none"> <li>• be direct</li> <li>• be well signed</li> </ul>
Safety	<ul style="list-style-type: none"> <li>• be safe and feel safe</li> <li>• have vehicle speed limits appropriate to the surroundings</li> <li>• have road layouts that encourage traffic to slow down and obey speed limits</li> <li>• be free from conflict with other traffic</li> <li>• have a high personal security</li> </ul>
Accessibility	<ul style="list-style-type: none"> <li>• link key destinations and connect with other routes</li> <li>• be continuous</li> <li>• be free from unnecessary barriers such as gates and steps</li> </ul>
Attractiveness	<ul style="list-style-type: none"> <li>• be well lit and well surfaced</li> <li>• be pleasant and encourage active travel</li> </ul>

### Cycling information

Information can particularly help novice cyclists and new staff. You can:

- provide staff and visitors with good information regarding the safest, easiest and most pleasant routes to your site (remember that cyclists can use different routes from the main roads that motorists use)
- use the knowledge of staff who already cycle and local cycling organisations, to produce a route map that can be both poster form and web based
- link in cycle awareness events with national campaigns, eg Bike Wise Month, and include cycle maps in induction packs for new staff.

### Cycle maintenance

Many people tend to neglect the maintenance of a cycle, unlike a car, which is regularly serviced. This can act as a barrier to people cycling. To overcome this:

- arrange regular maintenance sessions
- if possible, run those sessions in-house
- ensure that staff running them are adequately trained, or approach a local cycle shop to provide a mechanic to visit your site or arrange for staff to take their cycle to the shop
- pay for the labour, and in some cases replacement parts, as this will be beneficial.

## 5.3 Cycling continued

### Cut-price cycles and equipment

Some staff may be reluctant to undertake the costs of a cycle and associated equipment without being sure that they will use it. What you can do to address this:

- Arrange a **loan period of equipment** with a cycle dealer for staff to try and see if cycling is a viable option. At the same time, the dealer can offer advice on the right equipment and best cycle option for the individual. This can include folding cycles, so staff can use them easily on public transport.
- Negotiate a cycle discount for staff with the cycle shop, or purchase the cycles and then lease them to staff.
- Offer **low interest loans** that are deducted from staff members' salaries for bike purchases.

If you provide bikes to staff, you may want to put in the proviso that staff have to cycle for, say, 50 percent of the time.

### Training and support

Setting up a **bicycle user group** (BUG) is highly advisable. This is a group of people within the organisation who want to improve facilities and encourage more people to cycle.

A BUG can:

- be a voice for cyclists and one of the best ways of promoting cycle commuting to others
- give new cyclists a point of contact for support
- operate a 'bike buddy' scheme, where staff who cycle show new cyclists the safest routes to the site, or help with safe cycling techniques.

The BUG will be all the more effective if a senior manager who cycles joins.

It is also advisable to provide a **training scheme** from a specialist that:

- provides an opportunity to enhance cycle skills and get advice on equipment
- shows that the organisation is committed to cycling.

### Pool cycles

Pool cycles enable staff to cycle off-site at lunchtime, or for sport and exercise. They can also be used to train staff to cycle or trial cycling before they purchase a cycle.



For details about the use of cycles for business, please see chapter 5 of the *Business travel efficiency guidelines* ([www.nzta.govt.nz/traffic/businesses/toolkit.html](http://www.nzta.govt.nz/traffic/businesses/toolkit.html)).

## 5.3 Cycling continued

### Case study

#### Transfield Worley Ltd, New Plymouth<sup>10</sup> – improved cycling facilities

A general upgrade of the company's staff facilities in 2009 was influenced by the number of people riding to work and parking in the basement:

- Four new cycle racks were installed in the basement, providing 40 additional cycle parking spaces.
- New toilets, hand washing, lockers, seats and showers were installed for both men and women in the newly configured staff area.

The number of cycle commuters has been increasing as the company has grown in size. The success of the various teams in the Bike Wise Business Battle also reflects the company's 'cycle to work' culture that has developed and is reinforced by the provision of the facilities.

### Useful links

Information about cycling can be found on the NZTA's website at [www.nzta.govt.nz/traffic/ways/bike/index.html](http://www.nzta.govt.nz/traffic/ways/bike/index.html).

This includes guidelines for cyclist skills training at [www.nzta.govt.nz/resources/roadcode/cyclist-code/about-cycling/cyclist-skills-training.html](http://www.nzta.govt.nz/resources/roadcode/cyclist-code/about-cycling/cyclist-skills-training.html) and *The official New Zealand code for cyclists* at [www.nzta.govt.nz/resources/roadcode/](http://www.nzta.govt.nz/resources/roadcode/).



<sup>10</sup> Source: Entry form for nominations for the CAN Cycle Friendly Awards 2009.

## 5.4 Public transport

### Why public transport?

For many commuters, public transport offers a good alternative to the car. As such, it is important that your organisation encourages it.

Advantages of public transport:

- greater access to traffic-restricted town centres
- public transport often costs less than the real cost of the same journey by car
- no need to find a parking space
- congestion-free routes on rail and bus, where there is a bus lane, means quicker journey times over the car
- can potentially reduce vehicle travel to work, thus generating savings on parking spaces for the organisation
- ability to relax, read or work.



### What you can do to encourage public transport use

A few ideas of how to encourage the use of public transport:

- Provide public transport maps and timetables.
- Negotiate with the local public transport operator to offer free trial weeks or discounted fares.
- Introduce a subsidy for weekly or monthly tickets or a 'points' system where employees can produce valid bus tickets in exchange for points that go towards, for example, lunch vouchers.
- Discuss service improvements with operators and councils.
- Introduce flexible work hours so that staff can schedule their workday around public transport services.
- Set up a public transport user group, so staff have a forum to discuss any issues they feel need addressing, and where staff unsure about using public transport could find a buddy to travel with until they are confident to travel alone.
- Provide bus tickets at reception for local business trips to familiarise them with using buses.

### Public transport information

Undertaking a trip on public transport can be daunting for some people, and requires planning, particularly if a connection has to be made. Many people are put off by the sometimes complex timetables or finding up-to-date information.

You can:

- provide public transport information in easy-to-read form, specific to your site, on the intranet and on paper, or link to the local operator's website
- provide maps of local routes, as they give people a more visual guide (if possible, mark facilities such as bus stops and train stations on these maps)
- prepare information in credit card size that staff could put in their wallets

## 5.4 Public transport continued

### Public transport information continued

- distribute any new information quickly to all staff, eg on noticeboards
- promote even well-used services, as there may be staff who live along a route who do not know about it
- look into possibilities to incorporate real-time information, if it is available.

Providing public transport information can be a quick win.

### Bringing the cost down

The cost of public transport is often cited as a major barrier to use, especially when staff compare it with the cost of driving (although this is often wrong).

#### Cost of car

Cars can be expensive to run. The average cost is between \$7,000 and \$14,000, including initial upfront cost, insurances, fuel and general maintenance. This gives a range of between 52.2c and 100.2c cost per kilometre, depending on type and size of vehicle<sup>11</sup>.

However, the biggest cost is the resale value, or depreciation, with a potential loss of more than 40 percent over the first two years<sup>12</sup>.

Offering **discounts** is one way to reduce the cost of public transport. From an operator's point of view, providing discounts can be worthwhile as they are potentially tapping into a new market.

What you can do to implement a discount scheme:

- Try to negotiate a staff discount ticket with the local public transport operator.
- Team up with similar organisations, so that you can offer the operator sufficient numbers of people to make providing a discount worthwhile.
- Further discount the ticket by your organisation offering money towards it.

Advantage of discounts per type of ticket:

Discount on:	Advantage
Monthly or seasonal ticket	Staff could use that ticket over the weekend and it changes the owner's outlook, as it becomes more financially attractive compared with the car.
Daily ticket	Staff who cannot use public transport every day due to other commitments (ie child responsibilities) can use it when they do not have to drive.

**Other options** to reduce the cost of public transport:

- free weekly pass for staff to try public transport (funded by the operator or your organisation)
- low or interest free loans, which are deducted in instalments from staff pay
- subsidised weekly or monthly tickets.

<sup>11</sup> AA petrol car costs fact sheet, 2008.

<sup>12</sup> The Dog and Lemon Guide, <http://dogandlemon.com/media/General%20Comments%20PDF/Depreciation%20New%20Zealand.pdf> (accessed 28 May 2010)

## 5.4 Public transport continued

### Service improvements

The data from your travel survey shows the service improvements likely to make the most difference.

To investigate and implement service improvements, you will need to talk to:

- operators, as they run the services and will be keen to increase patronage, particularly if your organisation employs a large number of people
- regional authority, as they provide the subsidies for services
- local authority, as they are responsible for the infrastructure, such as bus stops.

Topics to discuss:

- improving the frequency of services
- rescheduling timetables to accommodate your staff's work patterns
- providing modern, well-maintained buses
- relocating bus stops
- improving waiting areas at public transport stops
- extending the route onto site
- providing new connections.

If a new service is needed, you could:

- approach the local operator, who may provide a new service if there is enough potential patronage
- provide your own company bus - while this is expensive, you could provide this service to other businesses in the area to increase your passenger base.

It is a good idea to approach other businesses within the area to try and increase the number of potential passengers if your organisation is small.

### Overcoming concerns about public transport

Even if the public transport services run well, other potential issues may deter potential passengers. Many of the barriers to public transport are perceptions. It is important that your organisation is not putting forward conflicting actions such as encouraging staff to drive in case they need their car for work purposes.

Potential barrier	Action to overcome barrier
Difficult physical access to bus stops or train stations	Liaise with local authorities to identify good walking access to such sites. For example, put gates into fences at the back of train stations, so people do not have to walk further to access the station.
Concerns about personal security at waiting areas	Make sure there is good visibility, lighting, etc. Also the more people who use these waiting areas, the safer the area will be.
Fear of staff getting stranded at work	Provide a guaranteed ride home. It is unlikely that this will be greatly used, but goes a long way to allaying people's fears.
Concerns about work hours not matching public transport services	Adopt flexible working practices so that staff can fit their journeys around public transport timetables, and also to reduce the need to travel in the peak. Recognise flexible work practices as the culture, eg meetings organised late in the day will finish on time so staff can catch the last services.

## 5.4 Public transport continued

### Case study

#### Hutt City Council - subsidised public transport tickets<sup>13</sup>

In 2008, Hutt City Council put a travel plan in place, aimed at reducing the number of staff driving alone to work. A subsidy for the use of public transport when travelling to work was introduced:

- The uptake was slightly lower than estimated.
- Costs have been considerably lower than expected due to staff not always claiming the subsidy even if they are entitled to it.

A follow-up survey conducted in March 2009 showed a 5 percent increase in the use of public transport when travelling to work.

### Useful links

A list of links to public transport websites can be found on the NZTA's website at [www.nzta.govt.nz/traffic/ways/bus-train-ferry/index.html](http://www.nzta.govt.nz/traffic/ways/bus-train-ferry/index.html).



<sup>13</sup> Hutt City Council (2009) *Travel plan follow-up survey report*, 23 April 2009.

## 5.5 Carpooling

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### Why carpooling?

Carpooling means two or more people sharing a car for the journey to work. It can be a very effective way to reduce the number of vehicles around your site, will reduce peak-hour congestion and will help ease parking problems you may experience onsite.

Some sites may be quite isolated, or have employees who live in rural areas where public transport is limited. However, staff are still likely to be clustered in the same towns or villages, or live along corridors that lead to your site. In these types of areas, carpooling is likely to be the best way to reduce car kilometres.

The advantage for staff who carpool will be:

- less stress
- direct cost savings
- opportunity to socialise.

By carpooling, staff are not giving up the convenience of the car, but still helping to reduce traffic.

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### What you can do to encourage carpooling

Some ideas to encourage carpooling:

- Organise a carpool morning tea where potential carpoolers can meet and discuss travel arrangements.
  - Set up a carpooling scheme.
  - Implement preferential parking in prime locations, ie by the entrance, or no parking except for carpoolers.
  - Introduce a 'cash out' scheme that gives a daily payment to carpoolers.
  - Run a prize draw for carpoolers.
  - Allow staff to accrue extra time off.
  - Negotiate discounted or free warrants of fitness at a local garage for carpoolers.
- 

### Setting up a carpooling scheme

Carpooling schemes can range from informal arrangements to professional software packages.

Options include:

- noticeboards for informal arrangements
- maps of where staff live (gained from the travel survey)
- online carpooling database for staff to enter their journeys so that colleagues who have similar journeys can be matched up
- specialist software, if your company is large enough.

In most cases, a registration form for staff to fill out will need to be provided. This can also help to monitor how many people have registered and how many have found a suitable match.

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## 5.5 Carpooling continued

### Overcoming concerns about carpooling

People may have concerns that can potentially prevent them from carpooling.

Common barrier	Action to overcome barrier
Being stuck at work if the driver has to leave early or stay late, or not being able to get home in an emergency	Offer a guaranteed ride home for emergencies
Safety concerns	Organise a carpool morning tea where potential sharers can get to know each other
The school run	Encourage staff who have children at the same school to carpool
Concerns about personality clashes	Allow sharers to change carpools easily and without questions being asked
The need for staff to leave on time to honour carpooling arrangements	Foster an organisational culture where managers recognise this
Perception of 'my car is my personal space'	Promote carpooling as the norm within the organisation

### Parking and cash-out schemes

When implementing parking and cash-out schemes, a few things need to be considered:

Scheme	Things to consider
Parking schemes	To encourage carpooling, parking schemes must be enforced. One way to do this is to give each traveller a permit with a requirement that two or more must be displayed in order to occupy a shared space. Senior staff should not undermine the carpooling scheme by parking in a personal space by the entrance.
Cash-out schemes	Cash-out schemes should be extended to other users of alternative transport modes, otherwise there is the danger that the more efficient modes will be foregone and replaced by carpooling solely.

### Cost saving/sharing

An advantage of carpooling is the potential to save on costs, such as petrol and vehicle maintenance. The sharers should decide how they are going to split the cost, and this should be agreed prior to the journey.

Costs can be shared by:

- staff taking it in turns to drive their own cars
- sharing the costs of petrol, parking and reasonable wear and tear through an agreed payment.

The driver may not be paid for their time or any fines they may incur.

## 5.5 Carpooling continued

### Carpooling with other organisations

If the opportunity arises, it is beneficial to approach other organisations regarding the possibility of them engaging in carpooling, as the larger the number of staff willing to carpool, the more likelihood there is of gaining a good match. This will work best if the organisations are based close to each other.

### NZTA resources

More detailed guidance for workplaces about setting up and running a carpooling scheme is available on the NZTA's website at [www.nzta.govt.nz/traffic/info/businesses/carpooling.html](http://www.nzta.govt.nz/traffic/info/businesses/carpooling.html). This includes a range of carpooling resources, such as information brochures for staff, posters and parking signage. Links to carpooling websites are also provided.

### Case study

#### GNS Science, Lower Hutt<sup>14</sup> - Let's Carpool

GNS joined Let's Carpool, a Wellington region carpooling programme<sup>15</sup>, in 2009 to help staff find carpool matches. Carpooling posters around the workplace have been used to encourage new staff to register, and to show continuous GNS support for the initiative.

Results:

- About 10 percent of staff have signed up.
- Some carpools also include staff working at different organisations in Lower Hutt.
- Feedback from staff who carpool has been very positive.



<sup>14</sup> Source: Greater Wellington, GNS by email.

<sup>15</sup> [www.letscarpool.govt.nz](http://www.letscarpool.govt.nz) (accessed 18 March 2010)

## 5.6 Motorcycles/scooters

### Why motorcycles/scooters?

Where public transport, walking and cycling is not possible, motorcycles/scooters can be a good alternative to driving alone.

Advantages of motorcycles/scooters:

- They are more space efficient from a parking and congestion point of view.
- Motorcycles, mopeds and scooters can offer a more environmentally friendly alternative to travel by a private car.
- They are cheaper to run for staff.

### How to encourage motorcycles/scooters

Similarly to cycling, provision for motorcycles and mopeds should include:

- safe and secure parking
- changing facilities/storage for equipment
- interest-free loans
- motorcycle user groups
- information about safety gear
- the possibility of training for existing and new motorcyclists.

### Case study

#### Auckland Regional Council – Scoooooot!<sup>16</sup>

Electric scooters are one of the council's initiatives to green its fleet. Two scooters are now available for staff to get around town on business. This is part of the council's commitment to making its own transport clean and cost effective.

The scooters:

- charge up in about 90 minutes and cost about 50c to travel 100km
- have a top speed of 50km, so cannot go on the motorways or the harbour bridge.

The council has found that the full cost of ownership is less for hybrids and zero-emission vehicles, as they save on running costs.

### Useful links

Information about motorcycles is provided on the NZTA's website at [www.nzta.govt.nz/traffic/ways/motorcycle/index.html](http://www.nzta.govt.nz/traffic/ways/motorcycle/index.html).



<sup>16</sup> Auckland Regional Council, media release (20 February 2008). [www.arc.govt.nz/index.cfm?58A620FD-14C2-3D2D-B9CA-EA5858882785&objUUID=34B9A542-14C2-3D2D-B9D0-0153EAA69559](http://www.arc.govt.nz/index.cfm?58A620FD-14C2-3D2D-B9CA-EA5858882785&objUUID=34B9A542-14C2-3D2D-B9D0-0153EAA69559) (accessed 18 March 2010)

## 5.7 Carparking management

### Why carparking management?

One of the biggest determinants of success for a travel plan will be the ability to manage carparking.

Reasons for managing carparking:

- If your organisation provides plenty of free parking, there will be little incentive for people not to drive.
- Even if your organisation has significant carparking provision, you may find that it is difficult to cater for all those who want to drive.
- Providing extra parking may be restricted through lack of available land, expense of buying or renting extra parking, or planning rules.

This scenario can result in:

- overspill into surrounding local roads
- potential conflict between local residents and your organisation
- additional congestion, as staff who cannot find a parking space will tend to cruise around until they find one.

Carparking management can also benefit your organisation through savings on the cost of parking, and the release of land under carparks for more productive use.



Resource 1 contains information on the construction cost of carparking ([www.nzta.govt.nz/traffic/businesses/toolkit.html](http://www.nzta.govt.nz/traffic/businesses/toolkit.html)).

### Implementing a carpark management plan

Carparking management can be a contentious initiative. To be successful, it will need leadership from senior management and 'carrots' in place.

Your strategy will depend on a combination of site circumstances, availability of other transport options and organisation culture.

It is important to understand:

- the number of parking spaces and their current allocation/location
- the costs of parking to your organisation
- the revenue gained from existing parking and what happens to this revenue
- who currently parks and why
- who needs to park and why.

You will also need to consult with staff, senior management and other stakeholders.

### Parking space reduction

Reducing the number of parking spaces in your carpark makes it harder for staff to drive, and can encourage them to use an alternative form of transport. However, alternatives need to be in place to enable mode shift. The restriction of space also helps to justify any permit systems put in place.

## 5.7 Carparking management continued

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<b>Parking space reallocation</b>	<p>The wrong message is sent out if all the available parking spaces are taken up by senior management or according to rank or status. Spaces should be allocated according to operational or eligibility need.</p> <p>Options include:</p> <ul style="list-style-type: none"> <li>• reserving spaces for carpoolers; these need to be closer to the main entrance than other parking spaces, and will encourage staff not to drive alone</li> <li>• reallocating spaces to provide for staff or visitors with personal mobility difficulties</li> <li>• reserving spaces for fleet cars</li> <li>• reserving space for short-term parking, eg 'kiss and ride', where staff are dropped off by someone, or if staff need to drop off or pick up equipment</li> <li>• reallocating carparking spaces to cycle parking spaces</li> <li>• assigning an appropriate level of eligibility to staff who have caring responsibilities requiring a car for the work journey</li> <li>• reserving spaces for staff with out-of-hours responsibilities.</li> </ul>
<b>Eligibility criteria</b>	<p>To reallocate current parking spaces for different groups, you will need to develop eligibility criteria and issue parking permits or passes.</p> <p>Things to consider:</p> <ul style="list-style-type: none"> <li>• Parking should be restricted to those with a real operational need or who really have no alternative but to travel by car.</li> <li>• The system introduced has to be seen as fair.</li> <li>• It has to apply to all grades of staff, and any grievances should be heard.</li> <li>• The permit system has to be enforced to avoid abuse (barriers controlled by smart cards, manually with spot checks).</li> </ul>
<b>Parking charges</b>	<p>Charging for parking at work gives an incentive not to drive. It is not as effective as restricting parking spaces, which puts a more definite cap on the number of people driving.</p> <p>Providing parking as an organisation can run into many thousands of dollars. The carparking provision can be seen as a subsidy to car users, especially if it is free. Even if the organisation does charge staff to park, it is unlikely that they are recouping the full cost of the parking space.</p>

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## 5.7 Carparking management continued

### Parking charges continued

A few tips when introducing parking charges:

- Find out the cost of a parking space to your organisation to justify the need for parking charges, or put into the business plan to senior managers.
- If your organisation decides to charge a fee, ringfence this revenue and feed it back into other measures that promote alternative transport options for the site to improve acceptance of the scheme by staff.
- Charge for parking on a daily basis or pay-as-you-go. This is because yearly or monthly charges will provide an incentive to drive so as to extract the maximum value. Smart cards can debit a user's card on a daily basis.
- Consider eligibility, eg a free pass should be issued to mobility-impaired staff and others who warrant it.
- Introduce complementary measures, such as assistance with travel costs, or a travel allowance equivalent to the parking charge for staff who use other modes.

### Cash-out incentives

To encourage staff to not drive and ultimately give up a parking space, you could offer some sort of cash incentive. This can come in various forms and include entry into prize draws, daily accumulation of vouchers redeemable at retail outlets and salary bonuses.

If you offer a company car, you may look at offering staff the opportunity to change to a different package of benefits.

You could also consider a daily cash reward to every individual who doesn't drive. The payments in this type of scheme should roughly reflect the cost of providing a carpark space that would be saved, as people no longer need them. Carpoolers would normally be granted half the bonus.

### Overspill parking

If there is an abundance of free on-street parking around your site, any parking management scheme you initiate can be undermined, as staff may just start parking off-site. This can cause conflict with nearby residents.

In this instance, you may want to involve the local authority, in conjunction with local residents, and discuss the possibility of introducing on-street parking controls.

### Case study

#### Victoria University, Wellington – staff carparking management<sup>17</sup>

As part of the university's travel plan, staff carparking management was reviewed in 2008. A 'market' based approach for the pricing of staff carparks has been taken:

- The price of staff carparking permits (both licence to hunt and reserved) will increase by \$100 per year over the next three years to reach 50 percent of market value by 2011.
- The price will also be adjusted to the Consumer Price Index (CPI) each year, which was 4 percent in the June quarter of 2008.

The additional revenue generated by the increased parking prices is used to fund sustainable transport initiatives such as inter-campus public transport links and cycle storage.

<sup>17</sup> Victoria University of Wellington Travel Plan: Vic Commute, 30 September 2008, [www.victoria.ac.nz/fm/services/vic-commute.aspx](http://www.victoria.ac.nz/fm/services/vic-commute.aspx).

## 5.8 Reducing the need to travel

### Why reduce the need to travel?

While many measures can be implemented that will influence the way your staff travel, some of the biggest gains will actually come from reducing your staff's need to travel.

Staff will benefit by spending less time and money on their travel to work, which can help your organisation recruit and retain staff, and reduce parking spaces.

### Flexible working hours

Flexi-time sets core hours that staff are expected to be in the office, but allows them to arrive or leave at times that suit them.

This allows staff to:

- fit journeys around public transport timetables
- avoid peak hour travel in congested conditions
- fit in other commitments more easily.

Flexi-time can be taken further and can help reduce travel by:

- allowing staff to accumulate hours worked, so they could then use these to take a day off
- introducing compressed working so that staff can take off, for example, one day a week or one day a fortnight, as long as they have worked the required hours in advance.

Many staff will like this. Moreover, staff working extended days will be able to meet customers' needs outside usual working hours.

Flexible working practices can improve your staff's work-life balance, thus improving staff retention and productivity. For further information, see [www.dol.govt.nz/worklife/index.asp](http://www.dol.govt.nz/worklife/index.asp).

### Working from home

Working from home (or tele-working) means a staff member sets up a work space at home and works remotely. This can be occasionally, or regularly for an agreed number of days per week.

Working from home is becoming more common, and some particular types of jobs and industries have embraced working from home. This enables these companies to access a larger workforce, and save office costs.



## 5.8 Reducing the need to travel continued

### Working from home continued

Consider the following factors when assessing whether working from home is appropriate for your organisation:

- If working from home is not established in your organisation, you will need to develop a careful and well-planned implementation strategy. This might include piloting working from home on a number of people or slowly introducing working from home practices.
- Assess what would need to be included in employment contracts - consider consultation with any unions.
- Assess legal issues, including safety in the workplace laws.
- Assess communication and technology requirements, including remote access to internal servers and drives.
- Assess security and confidentiality issues, such as holding confidential files off-site.
- Determine which jobs and types of people are best suited to working from home.
- Determine the content of agreements between staff and managers.
- Assess likely costs of working from home, and where the costs lie, eg office equipment such as desks and computers, energy use.

### Local recruitment

To reduce travel to work, your organisation can develop a local recruitment strategy for the roles where the skills can be easily acquired locally. This can increase the use of modes other than driving alone.

The travel plan can also make your organisation an employer of choice, as the measures you put in place make you a more attractive employer.

### Relocation packages

It may not always be viable to employ from the locality, so you may have to search a wider catchment area. A relocation package may be the difference between someone choosing to drive a long distance each day or relocating nearer to the worksite and using alternative modes.

A few ideas for relocation packages:

- Provide an information pack with local walking and cycling maps, public transport timetables and details about the organisation's shower and cycle parking facilities.
- Offer a free public transport trial week.
- Require staff to move within a defined distance to the worksite to qualify for the relocation package.

### Onsite facilities

If your organisation is large enough, or if you team up with other nearby organisations, then you may consider providing facilities such as onsite cash points, cafes, dry cleaning, etc. This helps to reduce lunchtime car trips by staff, and may even negate the need to drive to work at all.

If you can't provide these facilities and they are not available within walking distance, you could offer pool cycles for staff to use to get to town during lunch.

## 5.8 Reducing the need to travel continued

### Choosing a suitable location and satellite offices

A suitable location can have a greater effect on staff travel patterns than many travel plan initiatives, as it determines the opportunity to use other modes.

What you can do:

- If relocating, choose a new site that is close to major public transport hubs as it gives staff an alternative transport option straightaway.
- If the organisation has a high proportion of staff living a long way from the workplace, investigate introducing a satellite office that is closer to those staff, especially if working from home is not an option. The location of a satellite office should again be close to public transport hubs.
- If your organisation is smaller, investigate renting space from larger organisations that have spare capacity, with your staff 'hot-desking' at these points.

### Case study

#### Unisys House - tele-working<sup>18</sup>

Unisys New Zealand is one of the many businesses that have found the benefits of tele-working. With 550 staff spread across offices from Auckland to Dunedin, every one of them has the option of tele-working. Staff can decide what kind of employee they wish to be:

- a 'homer' - permanently office based
- a 'roamer' - working at client sites, home or office
- a 'zoner' - predominantly based in another location.

From the outset, Unisys sets goals and makes employees accountable for their output. Unisys has stated the benefits are measurable - the HR department recorded that staff engagement jumped by 6-7 percent in one year.

<sup>18</sup> Computerworld (20 August 2008), <http://computerworld.co.nz/news.nsf/netw/4B08E090F60C311DCC2574A90017E19F> (accessed 2 December 2009)

## 5.9 Business travel

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### Why tackle business travel?

Business travel accounts for a significant proportion of all journeys undertaken. Every organisation generates business travel and as such it should be an integral part of the travel plan.

How an organisation arranges for business travel can also affect how staff travel to work. For example, if staff are expected to use their own vehicles for business purposes, then they are likely to use their car on the commute.

Some initiatives to improve business travel efficiency can also provide an opportunity to make staff familiar with a mode of transport they might otherwise not use.

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### Business travel initiatives with relevance for travel to/from work

Initiatives to improve business travel efficiency can also support your goals for the travel to/from work, eg:

- Tackle contradictory company policies, eg company cars as a perk.
- Provide fleet cars so that staff do not have to bring their own vehicles for work.
- Provide public transport tickets for business trips or travel to the airport.
- Provide pool bikes that staff can also use during lunch breaks or to try cycling.
- Provide rain coats and umbrellas that staff can also use during lunch breaks.
- Carpool or taxi pool for business trips to familiarise staff with organising shared rides and travelling with someone unfamiliar.

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### Personal company cars

Some organisations have policies that mean driving a company car is seen as a perk, which will continue to encourage their use. It can take time to move away from this type of culture, as it may be embedded in personal contracts or union agreements.

What you can do:

- Offer alternative benefit packages, such as travel allowances or season tickets for public transport or a cycle plus cash instead of company cars to new employees.
  - Introduce a 'cash for cars' scheme, where a cash benefit is offered in exchange for the return of a company car for existing employees.
  - Remove the carparking rights for company cars.
  - Replace car loan schemes with public transport monthly or season tickets and cycle loan schemes.
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## 5.9 Business travel continued

### NZTA resources

Detailed information about measures and initiatives to address business travel is provided in chapter 5 of *Business travel efficiency guidelines* ([www.nzta.govt.nz/traffic/businesses/toolkit.html](http://www.nzta.govt.nz/traffic/businesses/toolkit.html)).

### Case study

#### Westpac - reducing carbon emissions<sup>19</sup>

Westpac has a goal of reducing their carbon dioxide (CO<sub>2</sub>) emissions by 20 percent per active customer in four years, starting with 4 percent per active customer in 2009.

Air and land transport account for 43 percent of total CO<sub>2</sub> emissions.

Westpac has tackled transport emissions by:

- reducing travel budgets, implementing a business unit CO<sub>2</sub> emissions cap and encouraging video-conferencing
- further replacing their vehicle fleet with hybrid and diesel cars (as at September 2009, there were 139 hybrid and diesel vehicles in the fleet, with a further 108 due to be rolled out).

Due to reduced air travel and improved energy and car fleet management practices, Westpac had exceeded their 4 percent objective and achieved a 26 percent reduction of CO<sub>2</sub> per active customer by the end of June 2009. Westpac also achieved cost savings as a result of these initiatives.



<sup>19</sup> [www.westpac.co.nz/olcontent/olcontent.nsf/Content/Reducing+carbon+emissions](http://www.westpac.co.nz/olcontent/olcontent.nsf/Content/Reducing+carbon+emissions) (accessed 1 December 2009), by email.

## 5.10 Other strategies

### Incentive schemes and promotional events

If you introduce incentives for staff to reduce car use or hold promotional events, they need to be applied over the whole range of sustainable travel.

Nevertheless, it is possible to give, for example, a walking incentive and market it in a targeted way – eg with a walkers' breakfast. It is a good idea to run such schemes or events in conjunction with those for other users of alternatives to the car, eg a cyclists' breakfast a few weeks later.



If cash-out payments are offered, the principle should be based on the reduction of vehicles to the site. For example, if \$1 is offered for every carparking space freed up, those who walk or cycle through the entrance should receive the full \$1. Two people sharing a car will get 50c, while solo drivers get nothing.

### Personalised travel planning

There is a common perception among staff who habitually drive to work that public transport is unreliable and that cycling is dangerous as the only route is along busy main roads.

In reality, there is usually a mismatch of what people think is available and what is actually available. Marketing and promotion will narrow the gap between this mismatch, and personal advice will help them to understand what seems like complex public transport timetables, or help identify safer walking and cycling routes. In many cases, a simple clear listing of a bus route with the times that the bus goes past the individual stops can help overcome these concerns.

Often, personalised advice is best accompanied by introductory offers, such as a week's free bus pass to try the bus.

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## 5.10 Other strategies continued

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### Induction packages

All new staff should receive comprehensive information regarding the efficient travel options to the site. This is best done before they start, and can be sent with their new contract. The other time to reinforce this is in their induction.

Introductory offers could encourage staff to try alternative transport modes, eg:

- introductory free weekly tickets for public transport
- discounts and/or interest-free loan for annual season ticket
- free or discounted company cycle
- cash to forego entitlement of a carpark permit.

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### Visitors

Your organisation will attract visitors who use cars.

Measures to reduce this can include:

- directions to the site using alternative modes, including maps, timetables, visitor cycle parking, etc on your organisation's website, with a phone number for those with questions; this information could go on the back of brochures or business cards
- a standard email that tells visitors the above and has a web link to local public transport information
- a parking charge if parking is chargeable at your site, and respective information for visitors prior to their visit.

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### Area networks

There are increasing opportunities to link up with other organisations in your area to jointly develop travel plans. This can still be done even if the other organisations don't have a travel plan, as they may still wish to get involved in some initiatives.

Initiatives such as carpooling and shuttle buses will benefit from a greater pool of people and resources that several organisations can offer over just one. This is particularly beneficial if your organisation is small.

Organisations close together can often produce shared travel information and marketing materials. It may be that a dedicated travel plan coordinator can be employed to work on a shared travel plan for the organisations in the area.

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## 6.0 Marketing and awareness raising

### 6.1 Overview

#### At a glance

To achieve long-term behavioural change, you need to understand how to challenge often ingrained beliefs and attitudes. While some staff members will already travel by sustainable modes, others will have limited or no awareness of the issues of car use. Changes in attitudes will have to happen before behaviour change can occur.

Employing marketing techniques will help you with this. Marketing is important because:

- communication regarding your travel plan will start the minute you send out your travel survey or set up initial discussion groups
- how the travel plan is communicated will determine to an extent how successful it will be.

It is a good idea to develop a marketing strategy and a tactical action plan. By assessing your current situation including strengths and weaknesses, and developing marketing goals and key messages, you will give your marketing strategy a clear focus.

You can then plan your tactics in a way that ensures your target market knows about your travel plan, and how and why it will serve their needs. It is helpful here to consider the travel plan as your 'product' and your organisation's staff as the 'consumers' of the measures you will put in place.

Your tactical action plan will then have to be implemented and monitored.

#### The marketing strategy and tactical action plan step by step

Step	Action
1	Assess your current situation
2	Develop marketing goals
3	Develop your key messages
4	Plan your marketing tactics
5	Put together your tactical action plan
6	Implement and monitor your tactical action plan

#### In this chapter

	Section	Page
6.1	Overview.....	6-1
6.2	Changing habitual behaviour .....	6-2
6.3	Developing your marketing strategy .....	6-4
6.4	The tactical action plan .....	6-7

## 6.2 Changing habitual behaviour

### Habitual behaviour

Over time, people's travel behaviour can and will become habitual, eg:

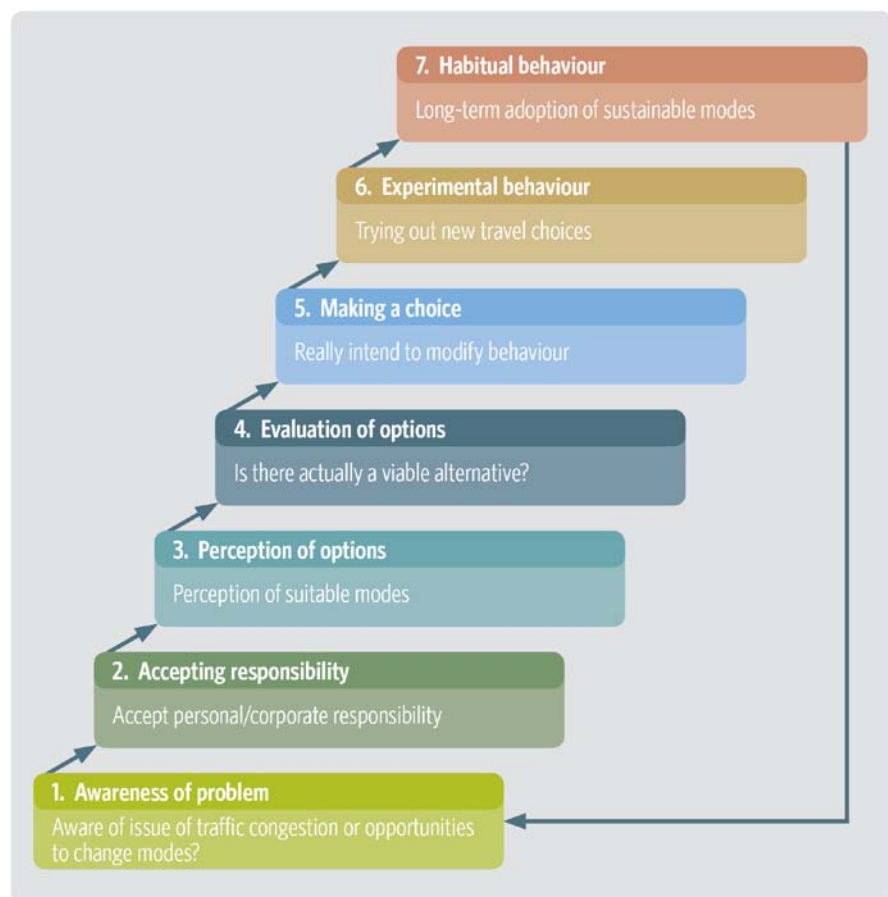
- Some may travel by car simply because they have done for years, and the reasons behind this may be that they have little knowledge about how to use public transport, or have inaccurate perceptions about walking and cycling.
- Some may be constrained to one mode.
- Other people will use a mode of transport according to where they are in their life, eg someone may have driven their child to school for the past five years, but now the child catches a bus to a different school, enabling the parent to potentially use a different mode.

These habits will take time to change. It is unrealistic to believe that people who had not previously used different modes will change overnight. They are more likely to change with viable alternatives to choose from, over a period of time.

### Seven stages of change

The 'seven stages of change' model below shows that changes in people's awareness and attitudes have to happen before any behavioural change can occur. This can help identify the progress of a target group towards behavioural change and help select appropriate initiatives and measures.

#### Seven stages of change



From: *Making campaigning for smarter choices work*, DfT, May 2005.

## 6.2 Changing habitual behaviour continued

### Using the model for changing travel behaviour

Within your organisation, you are likely to have a mix of people who are at different stages within the model. Some will already have habits that use sustainable modes (stage 7), while others will have no awareness of the problem of using a car (stage 1).

By identifying different groups at different stages (from the travel survey), it will be possible to implement initiatives that will get the best results from each group.

Stage	Description
1 & 2	People at this stage will require measures that give a general understanding of the problems associated with car use, such as awareness posters, leaflets and events.
3 & 4	People in stages 3 and 4 are already aware of the issues with car use, but are not wholly convinced of the benefits of other modes. Measures here could include provision of public transport timetables, relocating cycle parking to a more favourable location, etc.
5, 6 & 7	These people are committed to travel behaviour change, and the measures need to be in place to allow them to make that change.

The 'seven stages of change' model can be applied to **all** trips an individual makes according to journey type.

#### Example

Someone may cycle to work, ie stage 7. However, all their business trips use aircraft or pool cars, as their perception is there is little opportunity to change mode, ie stage 1, when in fact video-conferencing could be utilised.

## 6.3 Developing your marketing strategy

### The focus of the strategy

Developing a marketing strategy is important for the success of the travel plan and will help you identify the practical steps you need to take to achieve your goals.

Without one, there is a risk that your efforts to appeal to people to change their mode will be haphazard and inefficient.

The focus of the strategy should be on making sure the travel plan meets the needs of staff or the 'what's in it for me?' factor. This means the strategy needs to be flexible and respond to staff perceptions and demand. These can be geared around elements such as time and cost savings, or health benefits.

Part of your marketing strategy should be a tactical action plan that outlines a schedule of key tasks and sets out what needs to be done by when and by whom, along with an assessment of resources needed.

But before you develop your tactical action plan, you need to:

- assess the current situation
- understand your strengths and weaknesses
- develop your marketing goals.

### Assess the current situation

You may want to ask yourself the following questions:

Question	What you can do
Where are we now?	<p>Consider:</p> <ul style="list-style-type: none"> <li>• What is the level of awareness of what a travel plan is?</li> <li>• What are the barriers to it?</li> <li>• What is the staff attitude to it?</li> <li>• What resources are available?</li> <li>• What has been done in the past?</li> </ul> <p>This and more information (eg about facilities, schemes and policies for efficient travel) can be gained through the data collection stage of the travel plan project.</p>
Where do we want to be?	<p>To measure the success of marketing campaigns, you need to develop goals and objectives. Again, these will come from the travel survey.</p> <p>Objectives should be based on 'outcomes' - what you want to achieve - as opposed to 'outputs' - what you will do to achieve it. For example, measuring the number of people who have started to use the bus is more appropriate than counting the number of people who have been sent a leaflet about the bus service.</p>

Continued on next page

## 6.3 Developing your marketing strategy continued

### Assess the current situation continued

Continued from previous page

Question	What you can do
Who are your target audiences?	<p>Your staff will fall into particular groups or segments, characterised by their needs. These can be identified through market research or the travel survey. They can be, for example, those who already cycle or those who would cycle if certain measures were put in place.</p> <p>From this, you can target the group you want to reach. For example, if you have a large number of cycle parking spaces but staff don't cycle because they want more cycle parking spaces, your marketing activity can be aimed at them to highlight that plenty of cycle parking is in fact available.</p>
How are we going to get there?	<p>Different approaches will be needed depending on what you are trying to achieve, eg 'raising interest' versus 'encouraging your audience to actually take action to change mode'.</p> <p>Some things to think about:</p> <ul style="list-style-type: none"> <li>• Develop messages and decide what you want to say and how you need to say it.</li> <li>• Find your target audiences' triggers and sell them the benefits. Be aware that people's different roles and characteristics within the organisation will likely mean they respond to messages differently.</li> <li>• Anticipate problems and objections and plan how to work around them.</li> <li>• Make sure that you are heard, by targeting different audiences with the appropriate media, eg a senior manager may respond better to face-to-face meetings.</li> </ul>
How will you know when you have arrived?	<p>Think about how you will monitor your progress towards your objectives. If it looks like you are not going to hit an objective, you may need to review how you are marketing it to see if there is a better way of getting that message across. Alternatively, review the objective itself - is it realistic?</p> <p>Assessing the successes or failures of the marketing campaign will enable you to find out what is working, what's not, what or whether changes need to be made and justify spending on the campaign.</p>

## 6.3 Developing your marketing strategy continued

### Understand your strengths and weaknesses

A SWOT analysis will allow you to identify your strengths and weaknesses (internal to your organisation), and your opportunities and threats (external to your organisation).

Topic	Examples
Strengths	<ul style="list-style-type: none"> <li>strong management support</li> <li>site close to public transport hub</li> <li>showers and changing facilities onsite</li> </ul>
Weaknesses	<ul style="list-style-type: none"> <li>lack of budget</li> <li>lack of management buy-in</li> <li>little staff support</li> <li>travel coordinator role part time</li> </ul>
Opportunities	<ul style="list-style-type: none"> <li>new bus route established</li> <li>rising petrol prices</li> <li>site relocation</li> </ul>
Threats	<ul style="list-style-type: none"> <li>bus route taken away</li> <li>decreasing petrol prices</li> <li>little local authority support</li> </ul>

You should look for opportunities that play to your strengths and decide what to do about threats to the travel plan and how to overcome important weaknesses.

### Develop your marketing objectives

Once you have assessed the current situation and identified your strengths and weaknesses, you should set your marketing objectives.

These should be linked to the overall travel plan strategy, eg reducing car use by 10 percent. They will help everyone understand what you are trying to achieve.

Objectives should always be:

- Specific
- Measurable
- Achievable
- Realistic
- Time-bound

### Develop your key messages

Setting key messages will allow you to be consistent when communicating to your audiences.

It is a good idea to set about three or four overarching key messages for your travel plan promotion. However, you may have slightly different key messages for different audience groups, depending on their needs and your approach.

## 6.4 The tactical action plan

### Planning your marketing tactics

Once your objectives have been set and your key messages agreed, you need to decide on the best marketing tactics that will ensure that your target market knows about the measure and why it serves their needs.

Successful travel plan marketing will include:

- lively presentation
- persistence
- use of a variety of marketing tools and techniques.

When devising tactics, it is useful to utilise the **7 Ps**. Think of the travel plan and the initiatives and measures that it encompasses as the product, and the staff as the consumers of this product.

The 7 Ps	Description
Product	There is no point developing a product that no one wants to consume. To be successful, it works best to find out first what staff want and need, and then develop a product that will meet this need.
Price	The cost of initiatives to staff, including the added value. For example, a parking charge may be introduced, but bus passes can be offered to offset this. It can also include the amount of money available for marketing.
Promotion	This is the way you communicate to your consumers about your product, and can be done in a variety of ways. Customers should be aware that a product is being sold. Promotion must get their attention, be appealing, inform them of a consistent message and give them a reason to use your product over others.
Placement	This is where the consumers can obtain the product, meaning you have to make it accessible to them. The product must be available at the right time and right place and in the right quantity.
People	The people who are operating the travel plan are guardians of the brand and will make the impression on the consumer. Therefore, it is important they are trained, motivated and enthusiastic.
Processes	The processes such as information and communication, and the behaviour of those delivering the product, are key to consumer satisfaction. Getting this right helps to avoid negative feedback.
Physical evidence	The appearance of those delivering the product and the environment can affect how consumers view the product. The quality of media etc will make a difference.

## 6.4 The tactical action plan continued

### Practical tips

A few tips for tactics:

- Make it clear that you are not trying to get people to give up the car all the time, but to consider, experiment with and use more sustainable modes when there is the opportunity, and use their car more wisely.
- Use wording that suggests you are not imposing measures on people, eg 'we would like to encourage people to try alternative modes' rather than 'we would like people to use alternative modes'.
- Put contentious issues into context, eg when dealing with parking restrictions or parking fees, provide an explanation of parking, congestion and the wider environmental issues, and lead with high-profile positive measures that widen travel choices and bring benefits to staff.
- Make sure you actively promote successes. When people see what can be achieved, it will motivate them to carry on.

### Components of your tactical action plan

A budget needs to be formulated. If this is limited, it is better not to spread the marketing activities too thinly, but choose a few that will make the most of the available budget.

The tactical action plan needs to:

- set clear, realistic and measurable objectives
- include deadlines for meeting objectives
- have a budget for each marketing activity
- specify who is responsible for each activity
- link it to the strategy for the travel plan
- specify monitoring and review.

The plan also needs to say how the tactics will be controlled. You or another individual needs to take responsibility for pushing things through. It is also important to stand back at times to assess if the plan is working, and if not, implement changes so that it does.

### Timing

The action plan should contain a list of key milestones and their timings. Some milestones could be:

- introduction of the travel plan to staff
- start up of the focus groups
- launch of the staff travel survey
- results from the staff travel survey
- launch of the travel plan
- progress
- introduction of new measures.

Staff will want to see the results of the travel survey. Using facts and figures is a good way to reinforce the message as to why a travel plan is being implemented.



Also see Resource 1 for facts and figures you could use ([www.nzta.govt.nz/traffic/businesses/toolkit.html](http://www.nzta.govt.nz/traffic/businesses/toolkit.html)).

For individual initiatives, such as the travel plan launch or a carpooling launch, a special promotion should take place.

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## 6.4 The tactical action plan continued

### Media and branding

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While a range of different media is available to promote the travel plan, it is worthwhile to put some criteria to it that you think are:

- suitable
- possible
- likely to attract attention and support
- affordable.

The branding of your travel plan will help to make it unique and give it a strong identity among your staff. A good idea is to run a staff competition, with a prize for the winning entry.

Some examples for travel plan names are:

- 'Lift' – Auckland airport
- 'Vic Commute' – Victoria University, Wellington
- 'Routes to BOOTS' – Boots (UK)
- 'STEPS' (Sustainable Travel Equals Perfect Sense) – Nottingham County Council (UK).

### Promotional media

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A range of promotional media can be tactically used, and can include:

- electronic media
- leaflets
- posters
- displays
- give-away freebies
- newsletters
- working groups
- presentations
- high-profile launches.

It is a good idea to use methods that you think will work best at the right cost.

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## 6.4 The tactical action plan continued

### Maintaining the message

Initial enthusiasm for the travel plan may wane at any time. Therefore, you should be conscious of this, and look to maintain the momentum at every opportunity (📖 see chapter 8 for more about maintaining the momentum).

Something that goes wrong with an aspect of the travel plan can be quickly picked up by staff who are sceptical of the plan. If the plan is seen to be weak, word will quickly get around. However, if staff see that the plan is well managed, it will further enhance its credibility and standing within the organisation. Don't underestimate the power of word of mouth.

To ensure the travel plan retains its credibility:

- ensure initiatives in place work, by regularly reviewing them
- respond to problems promptly should any arise
- keep information up to date and readily available
- provide a feedback mechanism for both positive and negative feedback from staff.

Remember, success breeds success, so make sure that monitoring procedures are kept up to date, and relay positive messages back to staff.

Don't be afraid to revitalise the message at any point if other priorities within the organisation start to overshadow the travel plan message, or if the emphasis of the travel plan goal has shifted over time. This may go as far as a complete re-launch to get the new message out to staff.

### Engaging with sustainable travellers

It may be an idea to encourage all staff who travel to work via sustainable means to register on a database. This can be used in the same way a carpooling database is, with those staff who want to walk, cycle or use public transport being matched in a 'buddy' scheme with those who travel the same route.

It also enables the travel plan coordinator to target groups with relevant promotions and reward schemes.

### Events

It is a good idea to tie your campaigns in with other awareness-raising campaigns at a local or national level. Some examples are:

Event	When	Link to webpage
Bike Wise	February	<a href="http://www.bikewise.co.nz">www.bikewise.co.nz</a>
Walk2Work Day	March	<a href="http://www.livingstreets.org.nz/">www.livingstreets.org.nz/</a>
World Environment Day	5 June	<a href="http://www.unep.org/wed">www.unep.org/wed</a>
Carpool Day	5 August	<a href="http://www.carpoolday.com/">www.carpoolday.com/</a>
World Carfree Day	22 September	<a href="http://www.worldcarfree.net/wcfd/">www.worldcarfree.net/wcfd/</a>
SPARC Push Play	October	<a href="http://www.sparc.org.nz/">www.sparc.org.nz/</a>

### NZTA resources

A template for a marketing strategy and tactical action plan is available in Resource 10 ([www.nzta.govt.nz/traffic/businesses/toolkit.html](http://www.nzta.govt.nz/traffic/businesses/toolkit.html)).

## 7.0 Implementation

### 7.1 Overview

#### At a glance

The objective of the implementation stage is to make the initiatives defined in your action plan happen.

The first stage of this will be to launch the travel plan in a way that involves all staff. Once this has been done, you can start to implement your plan. It is a good idea to communicate successes, as this will attract people to the plan.

#### The implementation stage step by step

Step	Action
1	Launch the travel plan
2	Implement the action plan
3	Communicate your travel plan's achievements

As a guide, the implementation phase usually spans at least one year but may extend beyond this if major engineering measures are planned. By this time, the travel plan should be embedded in the workplace's culture and can be enhanced through continual updating and modification.

#### In this chapter

Section	Page
7.1 Overview.....	7-1
7.2 Launch and implementation.....	7-2
7.3 Case study.....	7-3

## 7.2 Launch and implementation

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### Launching the travel plan

The launch is the 'go live' stage of the travel plan. It will:

- be a one-off event
- be high profile
- involve all staff.

The launch event should be communicated to staff well in advance by, for example, email invitation or posters around the site.

Ideas of what you can do for launch day include:

- morning tea for all staff with the CEO
- prize draw for staff who have travelled by sustainable means
- a flyer and incentive (eg puncture repair kit) on everyone's desk.

This can be followed up by an article in the staff newsletter, or an email to thank everyone who took part.

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### Implementing the action plan

After the launch, the action plan needs to be implemented.

When implementing measures that some staff may not like, eg parking measures, it helps to liaise regularly with them to keep them onboard. To placate staff and allow them a practical choice, it is worthwhile to have in place incentives for the use of alternatives to the car, before the disincentives are introduced.

Implementation will be completed when:

- the various actions have been implemented and signed off
- they have lasted the length of the timescales indicated in the plan.

Remember to communicate your travel plan's achievements during this time.

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## 7.3 Case study

### Context

#### Transit New Zealand, 2008

Transit New Zealand launched a travel plan in 2008. The organisation had about 400 employees spread over 10 offices nationally. The travel plan covered the entire organisation, with regional 'add-on' plans for individual offices.

### Launch of the travel plan

To launch the plan, a communication campaign was run and a launch event for all staff was held. The launch encompassed three steps.

Step	Actions
Pre-launch	<ul style="list-style-type: none"> <li>emails and intranet announcements one month prior</li> <li>flyers into everyone's in-tray two weeks prior</li> <li>series of posters two weeks prior, promoting the launch, competitions and prizes</li> </ul>
Launch	<ul style="list-style-type: none"> <li>morning tea</li> <li>CEO tele-conference to all staff</li> <li>prize draw for those who travelled sustainably on the day</li> <li>one overall bike voucher \$1000</li> <li>one sustainable rucksack for individual in each office</li> <li>prize for the wackiest mode of travel</li> </ul>
Follow-up	<ul style="list-style-type: none"> <li>article in internal magazine</li> <li>announcement of winners and thank you via email</li> <li>implementation of quick-win measures, such as providing public transport timetables shortly after the launch</li> </ul>

Pre-launch flyer

**SWAP THE PETROL PUMP FOR A BICYCLE PUMP!**  
 » Travel sustainably and be in the draw to win a brand new bike!

» TRAVELLING SUSTAINABLY has its own rewards, but a few bonus incentives don't hurt. To be in to win, you just need to travel sustainably to work on the Travel Plan launch day on 10 April and you go in the draw to win a brand new bike! Other prizes are also on offer in each office.

Riding an elephant to work is normal in some countries, what are you ride?  
 We're not suggesting you do that – elephants do generate a fair amount of their own emissions, after all – but we do encourage you to come up with wild and unusual ways to get to work sustainably. People who use the wackiest ways to travel to work have the chance to win spot prizes, so time to start thinking outside the car! Ideas could include roller-skating, skipping, sailing, and waterboarding, so see what you can do and give it a go!

Pedal your way to the Travel Plan page on the Intranet for more information about the terms, conditions and prizes.

This is a promotion on sustainable travel. We understand our success is to do a job that changes the way they travel to work, but you can do more. All through things such as the use of sustainable commuting and taking the time to think about their work. From: Mike de Haan

Launch poster

**THINK OUTSIDE THE CAR**  
 » TRAVEL PLAN LAUNCH 10.30am 10 April

» We pride ourselves on helping connect New Zealanders with a wide range of travel options.

Why not do the same when getting ourselves to work?  
 As well as hearing about how travelling sustainably can benefit your health and your back pocket, we'll be offering prizes for most sustainable travel and weirdest way of travelling to work.

Come along to the nationwide conference call on 10 April to hear more about Transit's new Travel Plan initiative.

**Take a stroll to the Travel Plan section of the intranet for more details.**



## 8.0 Managing the momentum and monitoring

### 8.1 Overview

#### At a glance

The objective of this stage is to ensure that the travel plan operates to its full potential.

It is worthwhile to maintain your initiatives on an ongoing basis. Support networks, incentives and promotions will help keep staff motivated. Again, the best way to do this is to keep staff informed.

To make sure your measures and initiatives achieve the goals and objectives, we recommend you regularly monitor the performance of the travel plan. This can be done by an annual follow-up survey or commuter snapshot, supplemented by targets such as usage of cycle parking.

Depending on the results of your monitoring, you can review and update your travel plan for continuous improvement.

#### The maintenance and monitoring stage step by step

Step	Action
1	Maintain your travel plan initiatives on an ongoing basis
2	Monitor your travel plan's objectives and targets
3	Update and modify your initiatives

As a guide, we recommend you monitor and review your travel plan at least annually, depending on your organisation's characteristics and how your travel plan project develops.

#### In this chapter

Section	Page
8.1 Overview.....	8-1
8.2 Maintaining the travel plan .....	8-2
8.3 Monitoring.....	8-3

## 8.2 Maintaining the travel plan

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<b>Ongoing maintenance</b>	<p>Once the travel plan has been launched, it can be very easy to be complacent and think that it will run itself. To maintain the commitment and enthusiasm of staff, it is important to keep them informed and motivated on an ongoing basis. There are many things that you can do to achieve this, and the degree to which you implement them will depend on your organisation.</p> <p>Remember that a travel plan is a process and not a product, and once launched should become an integral part of the organisation's functions.</p>
<b>Support networks</b>	<p>Support networks are a very effective means of maintaining the interest in the travel plan. They enable the sharing of experience, good and bad, and allow discussion of ideas that you may be able to use in your travel plan.</p>
<b>Incentives</b>	<p>It is worthwhile to continue to provide incentives for staff after the initial launch. The survey and the subsequent marketing will have identified different groups within the organisation. Make sure your incentives tap into the motivations of these groups in order to keep them switched on about the travel plan.</p>
<b>Promotion and information</b>	<p>Promotion and information is fundamental to keep people updated, informed and motivated about the travel plan. People will soon switch off if the bus timetable posted on the intranet has been superseded and they have missed their bus as a result.</p> <p>It is a good idea to make sure that:</p> <ul style="list-style-type: none"><li>• the messages adhere to the 'KIS' principle - 'keep it simple'</li><li>• the messages are clear and consistent</li><li>• ideas for promotion are encouraged on an ongoing basis</li><li>• successes are publicised.</li></ul>
<b>Realistic and achievable</b>	<p>For the travel plan to truly succeed, the alternatives to the car should be realistic. The objectives that have been set, and that staff have bought into, must be achievable.</p>
<b>Commitment and ownership</b>	<p>To be credible, the travel plan coordinator should display commitment to the principles of the travel plan and take ownership for its maintenance.</p> <p>The travel plan coordinator will be the key contact, source of information and driver for the travel plan. To achieve this, it is best to be accessible and approachable at all times.</p>

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## 8.3 Monitoring

### Monitoring plan

To ensure that the implemented measures and initiatives achieve their objectives, it is important to regularly monitor performance and review initiatives.

To monitor the progress of the travel plan, it is worthwhile setting up a monitoring plan identifying when and what methods you will use. This helps to ensure you are collecting the relevant information.



See chapter 4 for information about goals, objectives and targets.

### Follow-up surveys

Annual surveys will need to be undertaken in order to monitor the objectives and goals and identify any modifications that need to be implemented. They also market the travel plan and maintain staff interest.



The follow-up surveys do not need to be as in-depth as the original baseline survey.



More detailed guidance about follow-up surveys is available in Resource 6 ([www.nzta.govt.nz/traffic/businesses/toolkit.html](http://www.nzta.govt.nz/traffic/businesses/toolkit.html)).

### Other targets

Other targets can be used to monitor how your initiatives are performing on a regular basis. The targets will need to relate directly to your objectives and goals, but below are some ideas that you could use.

Area	Targets
Bus	<ul style="list-style-type: none"> <li>take-up of travel passes given out by your organisation</li> <li>amount of passenger transport expenses paid to your staff (monitors business travel element of the travel plan)</li> </ul>
Cycle	<ul style="list-style-type: none"> <li>the number of cycles in the cycle parking facilities</li> <li>number of Bicycle User Group members</li> <li>number of staff taking up cycle loan scheme</li> <li>amount of cycle kilometre expenses paid to your staff (monitors business travel element of the travel plan)</li> </ul>
Driving to work	<ul style="list-style-type: none"> <li>if you have a carpooling programme, you can count how many staff have registered and how many have been successfully matched</li> <li>a carpark permit system will give information on how many staff use the carpark</li> </ul>
Working from home	<ul style="list-style-type: none"> <li>number of staff working from home</li> </ul>
Business travel	 For business travel targets, see chapter 4 of the <i>Business travel efficiency guidelines</i> ( <a href="http://www.nzta.govt.nz/traffic/businesses/toolkit.html">www.nzta.govt.nz/traffic/businesses/toolkit.html</a> ).  A spreadsheet for a business travel audit and monitoring is provided in Resource 7 ( <a href="http://www.nzta.govt.nz/traffic/businesses/toolkit.html">www.nzta.govt.nz/traffic/businesses/toolkit.html</a> ).

### Review

Your monitoring results will show you the progress of the travel plan against the objectives and the goals set. You will also be able to identify priority initiatives for your travel plan in the future. For example, cycle use is not as high as it should or could be, extra publicity could help drive this initiative.

If other priorities within the organisation begin to overshadow the travel plan, or if the emphasis of the plan's goals changes over time, it might be a good idea to revitalise the message or even re-launch the travel plan to get the message out again.