

Resource 6 – Workplace travel survey guide

Overview

Introduction

The NZ Transport Agency (NZTA) provides a workplace travel survey (hereafter referred to as the 'travel survey') to support workplace travel plans.

This survey should be supplemented with other methods of data collection, such as staff focus groups, site and policy assessments and business travel audits.

Please note that this guide focuses on conducting baseline surveys and analysing baseline data. Some guidance is provided for follow-up surveys to help organisations collect and analyse monitoring data.

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About the survey

Objectives of the survey

The travel survey has two broad objectives:

1. Gather information to help workplaces develop their travel plan.
2. Collect nationally comparable information to comply with regional monitoring requirements and NZTA's national monitoring requirements.

Benefits of an online survey

The travel survey is an online survey and has a number of advantages over a paper survey:

- Survey costs are lower (the distribution costs are minimal and there are no data entry costs).
- It is easier to distribute the survey to employees.
- The response rate is likely to be higher (based on experience).
- Less time is required to administer the survey, process data and analyse results.

However, a paper version of the survey can be provided if required. NZTA does not provide data entry.

Scope of questions

The survey focuses on core information required for travel planning and monitoring purposes, and covers the following:

Topic	Details
Travel to/from work	<ul style="list-style-type: none"> • start address of the journey to work • methods of travel to/from work over a week • working hours (usual start and finish times) • reasons for current travel arrangements • travel time (ie the usual amount of time it takes to travel from home to work) • triggers that would facilitate behaviour change towards more efficient travel choices • alternative working arrangements (working from home, flexi-time, compressed work week)
Travel for business	<ul style="list-style-type: none"> • usual methods of travel for business purposes • reasons for car use • telephone, video and web conferencing • triggers that would facilitate behaviour change towards more efficient travel choices
Final questions	<p>Staff profiling questions (covering age and gender) to assist in sample evaluation and to determine whether there are different travel patterns.</p> <p>Other areas could be explored to enhance the value of the survey to individual workplaces. However, the NZTA has decided to keep the questionnaire short to minimise the burden on respondents and to focus on issues that apply in a wide range of workplaces across the nation.</p>

Type of questions

The travel survey contains mandatory, optional and modifiable questions:

Item	Details
Core questions	<p>These are mandatory and have two functions:</p> <ul style="list-style-type: none"> • They represent the bare minimum required (combined with a site and policy assessment) on which to base a travel plan, and • this information can be used to monitor the effectiveness of the travel plan. <p>They also provide the NZTA with valuable information about travel to and from work, a major contributor to morning peak congestion, and help to build up a picture of regional and national travel patterns.</p>
Address verifier	<p>This tool is part of the survey and enables the respondent to indicate where they start their journey to work. The tool automatically creates geographical coordinates for addresses entered which can then be used to create maps. For the geo-coding to work, staff will either have to enter a complete street address (eg 44 Victoria Street, Wellington Central, Wellington) or a street and town or city (eg Victoria Street, Wellington Central, Wellington).</p> <p>This tool is mandatory as it allows the calculation of kilometres travelled for monitoring purposes.</p>
Mandatory questions	These questions are required to develop an action plan.
Optional questions	There is a range of optional questions that we recommend to incorporate into the survey for a more in-depth analysis, depending on the nature of the organisation.
Modifiable questions	Some questions may be modified, eg the checkbox options may be changed or removed, as required.

Survey process steps

The process for conducting the travel survey follows a number of defined steps:

Step	Details
1	Define the target population for the travel plan and the time frame.
2	Set up the survey.
3	Market the survey in the lead up to its implementation.
4	Implement the survey (collect the data).
5	Analyse and report on the survey results.

Each of these steps is described in more detail in the following sections of this guide.

Defining the target population and timing

The target population

The target population is the group of people who are the subjects of the travel planning survey. It is important to have a clear definition of the target population, as this determines:

- who should complete the survey
- when the survey should be conducted
- the generalisations that can be made about the survey results.

To define the target population, decide whether you want to include:

- employees from all sites or a selection of sites (if the workplace is located in more than one site)
- employees who are on long-term leave (eg parental leave)
- employees who are on short-term leave (eg annual leave)
- contractors (long-term and/or short-term)
- employees who regularly work off-site or are located in small or regional offices (where the opportunities to change travel behaviour may be quite limited).

The survey should be available to all staff, as the bigger the sample size the better. It also raises awareness of the travel plan and avoids staff feeling left out.

If for some reason you are unable to survey all staff, it is important that the sample of staff who do receive the survey is representative of the organisation ie across departments and different grades of staff.

For the purpose of the travel survey, visitors (other than contractors who work on-site) do not need to be included in the target population.

Surveying workplaces with more than one site

If employees from more than one site are to participate in the survey, then it is important for both travel planning and monitoring purposes to capture the site where the employee works.

This information can be captured in the survey itself. This makes it possible to look at results for a single site or for the organisation as a whole, ie multiple sites.

If an individual employee regularly works at more than one site within a workplace, we recommend they complete the survey based on the location where they spend the largest proportion of their working week.

Timing

Careful consideration needs to go into the timing of the survey to avoid:

- public holidays, school holidays and any other periods when a relatively large proportion of employees are typically absent from work
 - company deadlines such as the end of the financial year
 - mid-summer and mid-winter, to avoid seasonal peaks in walking and cycling or driving due to very hot or cold weather
 - times when other surveys are going on within the organisation. as it will lower the response rate and create confusion between the surveys.
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Follow-up surveys for monitoring purposes should be carried out at the same time of the year as the original baseline survey to ensure consistency of seasonal influences.

A minimum overall lead time of six to eight weeks is needed to allow sufficient time to plan and promote the survey.

The time that the survey is available to staff, shouldn't be longer than two to three weeks. The questionnaire should include a deadline for completion and a name and contact number of someone who can provide support for staff who may have queries.

Setting up the survey

Indicative timelines

Things to consider:

- Leave approximately two weeks for the set up and testing of your survey – ie customisation, testing phase.
- Allow time for any internal approval process for your survey customisation/content to occur.

The optimal time frame to allow your survey to run is two weeks – however this period can be extended if necessary.

Step by step

Setting up the survey requires the following steps:

Step	Action
Request the survey	To get started with your survey, please contact the NZTA at workplacetravelplans@nzta.govt.nz and we will get in touch with you.
Provide details	<p>You will be asked to complete two documents:</p> <p>The survey request form</p> <p>This form contains the survey questions and provides guidance as to which questions are mandatory and which are optional.</p> <p>We can also customise the style of the survey to match your organisation's corporate style, logo etc.</p> <p>The confidentiality agreement</p> <p>Since the data collected by using the NZTA survey tool is subject to the Privacy Act, we recommend that you sign a confidentiality agreement with us.</p>
Test the survey	<p>Upon the completing and returning the forms, the survey will be set up and you will be sent a link to your draft online survey.</p> <p>To ensure there are no IT issues with sending and opening the link to your survey we advise testing it on some willing staff (around five is sufficient). It is also advisable to ask someone from your IT team to check to ensure there will be no problems for staff opening the survey.</p>
Implement the survey	Once testing has been completed and any issues resolved, the survey will be activated for the period you have specified. The survey is now ready to be implemented.

Marketing the survey

Communicating the survey

Effective marketing will maximise participation in the survey and therefore minimise any bias associated with non-response.

The pre-survey marketing activities need to communicate:

- the reasons for the survey
- organisational support for the survey (eg endorsement by the chief executive, management team or other key people)
- what will happen to the data (including privacy assurances)
- any incentives to encourage employees to participate in the survey
- when the survey will be conducted.

It is suggested that pre-survey communication commences two to four weeks before the data collection is due to start.

Pre-survey marketing methods

The following methods of pre-survey promotion have been successfully used to inform people and encourage them to participate in their travel surveys:

- posters
- articles in staff newsletters
- online messages from the chief executive or senior management including a chief executive (or equivalent)
- information on the intranet
- subject to resource availability, site visits by travel planning project team members to inform people about the survey, answer questions and encourage participation.

Communication methods and messages should be customised to reflect the organisational culture (ie the way people do things and like to hear about things in the workplace) and the resources and budget available to promote the survey.

Maximising the response rate

The response rate is the number of completed surveys divided by the number of surveys distributed times 100%. The higher the response rate the better.

There are several things that can be done to help maximise the response rates.

Tools	Things to consider
Covering email	A covering email should accompany the survey. It should: <ul style="list-style-type: none"> • be from senior management to reinforce the importance of the survey • introduce the survey in a neutral and unbiased way in order not to trigger biased responses • include the name and contact details of the travel plan coordinator.
Incentives	Some sort of incentive for staff who complete the questionnaire is likely to increase response rates, and can range from a prize draw to a small incentive for everyone who responds.

	<p>If an incentive is offered, it should not relate to the subject of the survey (ie it should not be a travel-related incentive), as this may bias responses.</p>
Reminders	<p>Reminders in the form of emails and posters should be sent out during the survey period. It may be practical at some point for the travel plan coordinator to walk around the office, encouraging and helping staff to complete the survey.</p>

Implementing the survey

Personal information

The travel survey collects some personal details from employees, particularly information about where people start their journey to work. This information:

1. can be used to map and calculate travel distances from individual start locations to the workplace and may also be used for personalised journey planning (names may be collected if an incentive is offered to respondents, eg for a prize draw).
2. will help NZTA to fulfil monitoring requirements.

All surveys need to be conducted in accordance with the New Zealand Privacy Act 1993. That's why you'll be asked to sign a confidentiality agreement as part of setting up the survey.

At the core of the Privacy Act are 12 information privacy principles that cover the collection, storage, use and disclosure of personal information.

Principles one to four govern the collection of personal information, which includes the reasons for collecting personal information, where it may be collected from and how it is collected.

Further information about privacy is available from the Office of the Privacy Commissioner under www.privacy.org.nz.

Online distribution

The following are required to enable the online survey to proceed:

- A list of email addresses of all members of the target population who will be surveyed online (and the site where they are located, if the target population covers more than one site). Ensure that:
 - there are no duplicates (ie each person only has one email address)
 - each staff member has an individual email address (ie the address is not shared with other staff)
 - the list only includes members of the target population (ie former employees, visitors and others have been excluded)
 - email details are correct.
- A link to the online survey (to be made available to participating workplaces through their regional authority or NZTA).
- Pre-survey marketing online. This provides a good opportunity to check the list by monitoring and investigating the emails that bounce back.
- Support staff to assist employees who are having difficulty accessing the survey or completing any aspect of it.

Once the survey link is issued to staff, they complete it online. Their data is automatically captured and the results can be collated in real time. This also means that the survey response rate can be monitored and interim results can be obtained before the survey is closed.

Issuing reminders

Most survey responses will be received within one to two weeks. The response rate may then rapidly decline. It is therefore suggested that the survey is kept open for a period of two to three weeks, with close monitoring of the response rate.

The NZTA can provide updates on how many staff have completed the survey over the survey period. If the response rate is low you may choose to increase the communications around promotion of the survey.

The online survey administrator can periodically issue reminders (which may be a blanket thank you or reminder) throughout the online survey duration.

Probably the more effective reminder methods are based on personal contact with employees to understand why some people may not have responded and to personally help them overcome any issues associated with responding. However this can be more time-consuming and expensive.

Analysis and reporting

Data provision

NZTA's survey tool produces a simple report based on survey results for each workplace. This consists of bar graphs, pie charts and tables that are suitable for use in your travel report.

In addition to this, you will also receive (by email) a file containing the raw and cleaned de-personalised data, which can be opened in Excel for further analysis.

You can use the Pivot Tables function in Excel to perform most of the basic analysis required. In general terms, this analysis will include:

- frequency distributions and percentages for categorical variables
- calculation of means and standard errors for interval variables
- charts and graphs to help communicate the survey findings.

If more sophisticated analysis is required, dedicated statistical software such as SPSS, SAS or ESPRI may be used by you.

The responsibility for the analysis for individual workplace data will be determined between the approved organisation and the workplace that is participating in the travel planning programme. NZTA does not provide data analysis and interpretation.

Interpreting the results

The travel survey will throw up a wealth of information about how staff travel to and from work and also during business hours. In the main the results will show:

Topic	Details
Travel to and from work	<ul style="list-style-type: none"> • How people get to work: the modal share (proportion of people who use different modes) will be significant. From this, targets can be set that can realistically be achieved. • The time taken to get to work. • What measures need to be in place to encourage or make people change to a different mode. • The popularity of the different options will give an idea of what measures will be the best to implement. <p>Further analysis will allow you to determine:</p> <ul style="list-style-type: none"> • Who is using different modes; this is important, and will enable to provide measures that can target a specific group. For example, the modal share may be different for men/women, or different age groups. • A comparison between why staff use a car, eg drop children at school, can help to identify to what extent they may change mode. • Who would be willing to change their travel behaviour; this will often be dependent upon alternatives available. <p>For travel planning purposes, it is also appropriate to analyse the data by age and gender, to determine if there are differences between groups.</p>
Travel for business	<ul style="list-style-type: none"> • How frequently people travel for business. • How they travel for business (the modal share). • What measures need to be in place to encourage or make people change to a different mode. • How many of their business trips staff think could be replaced by teleconferencing.

- What has discouraged staff from using teleconferencing. Further analysis in conjunction with the results of your business travel audit will allow you to estimate the potential for cost savings on business travel.

Reporting

Once data has been collected and analysed, it is advisable to prepare a brief report that brings together the information in a clear and logical format. The survey report may be a stand-alone document or a component of a wider travel planning report that covers the range of investigations undertaken to inform the development of the travel plan (eg a site audit and other customised forms of employee consultation, such as focus groups).

The report, as it relates to the travel survey, should include:

- a summary of the key findings
- a statement of the goals of the travel plan and the goals of the travel survey, and any other data collection undertaken in association with the travel planning programme
- a clear statement of the target population
- an overview of the methodology, including the response rate and any issues associated with the survey administration
- the survey results (detailed tables should be included in the appendices).

At a minimum, the survey results section should describe current travel behaviour, including transport methods, journey length for the main method of travel to work, and travel times. These benchmark figures allow the measurement of changes in staff travel patterns.

People fib

When filling out questionnaires, people sometimes respond according to how they think you want them to. So it is wise not to base the whole strategy upon the survey, but use it in combination with the findings from the site assessment and the focus groups.

Sharing survey results with staff

To maintain support for the travel plan and encourage behaviour change, inform employees of the results of the survey and, if possible, how their input has contributed to the development of the travel plan.

Feedback can be provided in a number of ways, including:

- making paper and electronic copies of the report available to employees
- distributing summaries of the findings via payslips, email and newsletters, or posters on notice boards
- offering feedback sessions at staff meetings.

Follow-up surveys

Role and scope of follow-up surveys

Follow-up surveys will enable monitoring of the initiatives against the objectives and goals. This allows a review of the initiatives you have in place and potentially replacing or revamping them if the objectives are not being met. Follow-up surveys also market the travel plan and maintain interest amongst staff.

The survey that you used for your initial baseline on travel behaviours can form the basis of the follow-up survey. It does not have to be as in-depth as the original baseline survey.

The follow-up survey:

- should cover all the questions that provide data needed for monitoring purposes, ie the 'core questions' in the baseline survey
 - can include supplementary questions, for example, what actions your organisation could implement to achieve its goals.
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Timing of the survey

Surveys are best undertaken on a yearly basis. A few tips when best to repeat the survey:

- The survey should be carried out at the same time of the year as the original baseline survey in order to ensure consistency of seasonal influences.
- Public holidays, school holidays and any other periods when a relatively large proportion of employees are typically absent from work should be avoided.
- It is best to also avoid particularly busy times, eg the end of the financial year.
- Wherever possible, avoid extreme weather conditions.

Staff and management need to be told about the survey in advance, so that it does not come as a surprise.

Survey sample

In order to achieve a good response rate, it is recommended to aim to survey all staff and encourage them all to take part.

If this is not possible, surveying a representative sample from across the organisation by randomly choosing staff is a good alternative. This will need to be done by department if your organisation has clear sub-divisions.

Another sample issue is caused by staff turnover. Since staff will have left or joined your organisation, your sample population will not be the same anymore as for the baseline survey. This staff turnover may account for some of the differences noted between the baseline and follow-up survey results.

To more accurately measure the impact of initiatives on the subsample of staff who took part in both the baseline and the follow up surveys, you could include a question 'Did you answer the previous (date) survey?' and, if 'yes', 'Has your travel changed-how has it changed?'

Snapshot survey

It is worthwhile to monitor whether the initiatives are achieving the objectives at interim periods over the course of the year, rather than just relying on the yearly survey.

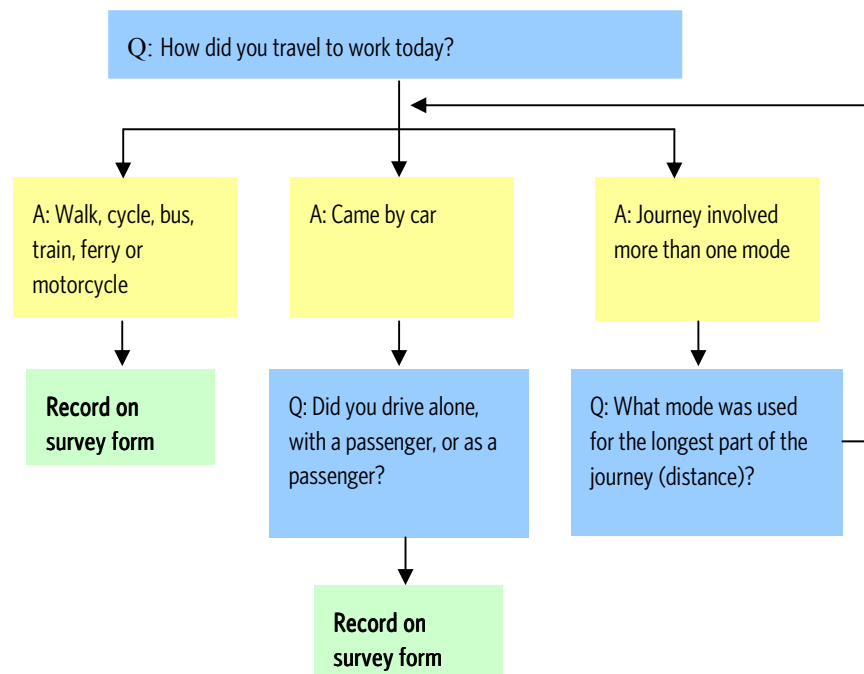
One way to do this is through a snapshot survey. This can also be used instead of a full yearly survey, if you find there are not the resources to conduct a full follow-up survey.

A snapshot survey consists of one simple question and involves the travel plan coordinator (or small team if large numbers of staff) walking around the site asking staff, 'How did you travel to work today?', using a simple form for recording purposes. As an alternative, a snapshot survey can also be carried out as a telephone interview.

The results of this survey will enable you to identify how well your initiatives are doing with regards to modal split.

Snapshot survey flow chart

These are the questions to be asked in a snapshot survey:



Analysing and presenting the data

Comparing the results of the follow-up survey with the baseline survey will give you an idea about changes in staff travel behaviour as the ultimate measure of success for the initiatives you have put in place.

It is recommended to share the results with management and staff to maintain their interest and keep them involved. This can be done in form of a short report summarising the key findings.