



Travel Plan Monitoring Guidance

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Why are we monitoring Travel Plans?

- To meet Travel Plan criteria outlined within the Oxfordshire County Council (OCC) Travel Plan Guidance document [Monitoring and Review of Transport for New Developments – Transport Assessments and Travel Plans \(March 2014\)](#). There is a requirement that any OCC approved Travel Plan will be monitored by the applicant / developer for a period of five years post full occupation.
- Joint commitment for the Travel Plan Monitoring Fee. As part of the original application, a Travel Plan Monitoring Fee will have been taken by the OCC Travel Plans Team to enable assistance with the required monitoring process. In addition to baseline data, the OCC Travel Plans Team will require data to be submitted in years 1, 3, and 5.
- To ensure active and sustainable travel is being promoted for residents and employees across Oxfordshire. Monitoring data should provide feedback as to the level of engagement by residents and employees within the monitored site. Results should indicate where an increase in, or change of, promotion is required.
- To ensure the effectiveness of any actions being implemented and identify whether different actions are required. Monitoring data will indicate whether the identified actions are having the required effect in achieving behaviour change. If necessary, revisions or changes to actions can be identified at this time.
- Opportunity for any appropriate revisions to Travel Plans. Monitoring data will indicate progress towards identified targets and highlight any adjustments or modifications required. This will ensure that targets and objectives are realistic and can be met.

Your obligations

As part of your approved Travel Plan you need to undertake monitoring. This must meet the criteria specified throughout this document and on page 23 of [Monitoring and Review of Transport for New Developments – Transport Assessments and Travel Plans \(March 2014\)](#).

Process

Contact

You should contact the OCC Travel Plans Team in your designated monitoring year to discuss the requirements. The team can provide advice and guidance on the Travel Plan Monitoring process and can be contacted by email (travelplan@oxfordshire.gov.uk).

Organising surveys

You need to organise surveys that meet the OCC requirements. These requirements are explained further in the Travel Plan Monitoring Report Content section.

Survey results analysis

The survey results should be collated and reviewed / analysed. This will allow you to identify any travel patterns at the site and provide an insight into the current performance of the Travel Plan. Survey results also provide an insight into potential Travel Plan measures that would further encourage active and sustainable travel. For example, if there are concerns around the number of available cycle parking spaces or people were not aware of local car sharing initiatives, these could be addressed with adapted measures.

Survey results should also be compared to the targets set out in the approved Travel Plan to evaluate progress.

Produce a monitoring report

There is a requirement to produce a monitoring report and submit it to the OCC Travel Plans Team for review and approval. The required content for the monitoring report is explained in further detail within the Travel Plan Monitoring Report Content section. The OCC Travel Plans Team will contact you to discuss any necessary amendments.

Future steps

This process will be repeated until the end of your designated monitoring period, in line with the commitments outlined in your Travel Plan. See the Future Actions section for more details.

Travel Plan Monitoring Report Content

The information we require in the submitted Travel Plan Monitoring Reports is shown below in Table 1.

Table 1 Travel Plan Monitoring Report Content

Section	Requirements	Further information
Site details	<ul style="list-style-type: none"> Planning application number Number of residents / employees / visitors etc. Size of site. Location map. Build rate (if staggered). Any other relevant changes. 	
TPC	Name and contact details.	
Existing Travel Conditions	Any changes to travel conditions from the approved Travel Plan e.g. new bus service or walking / cycling infrastructure.	
Objectives	These can be found in your approved Travel Plan.	
Targets	These can be found in your approved Travel Plan.	It is preferable that these are presented in a table.
Survey methodology	How the survey was undertaken (online, in-person, postal, etc.).	Please contact the OCC Travel Plans Team for advice for your site.

	Date(s) of survey and any points to note that would impact the survey results.	<ul style="list-style-type: none"> • Weather, COVID-19, any local issues e.g. road closures, flooding, rail delays etc. may impact survey results and give an atypical view of travel patterns. • Surveys should be repeated at the same time of year to allow for a more reliable comparison and to avoid the influence of seasonal variations. • Surveys should not be undertaken on bank holidays or during school holidays.
	Please include a copy of the survey(s) as an appendix.	<ul style="list-style-type: none"> • As part of the approval process your Travel Plan should already include a sample travel survey. • Surveys should collect both quantitative and qualitative data. • Survey templates can be found in the appendices of this guidance. Please ensure any surveys produced contain the required level of detail. Clarification can be obtained from the OCC Travel Plans Team on this.
	Response rate.	<ul style="list-style-type: none"> • Appropriate response rates to surveys must be obtained. Information on response rates can be found in Table 2, below. • Incentives can be offered to increase the response rate e.g. entry into a prize draw for a voucher for a local business.
Survey results	Present the survey results analysis.	
	Compare the results to any previous data and establish progress towards the Travel Plan targets.	Please present the required information in a table.
	Provide a commentary on the progress towards these targets.	<ul style="list-style-type: none"> • Identify effectiveness of actions

		<ul style="list-style-type: none"> • Include any external factors as to why the targets may not have been met, or when little progress is evident (this could link back to the survey results).
	If a baseline survey has been undertaken, please update your targets to reflect the new data.	All targets should be SMART in line with Appendix 5 of Transport for New Developments – Transport Assessments and Travel Plans (March 2014) .
Measures	Provide an update on the progress of identified measures.	Which measures from the approved Travel Plan have been implemented?
	Provide a brief overview of the effectiveness of the implemented measures and update timeframes if necessary.	
Action plan	Update the action plan from the approved Travel Plan.	
	Agree the next monitoring date for the Travel Plan with OCC and include in the final report.	

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Response Rates

Updated OCC required response rates for Travel Plan Monitoring Surveys are shown below in Table 2.

Table 2 Response rates

Type of site	Required response rate
Residential (up to 199 dwellings)	60%
Residential (200+ dwellings)	40%
Employment	90%
All other sites	70%

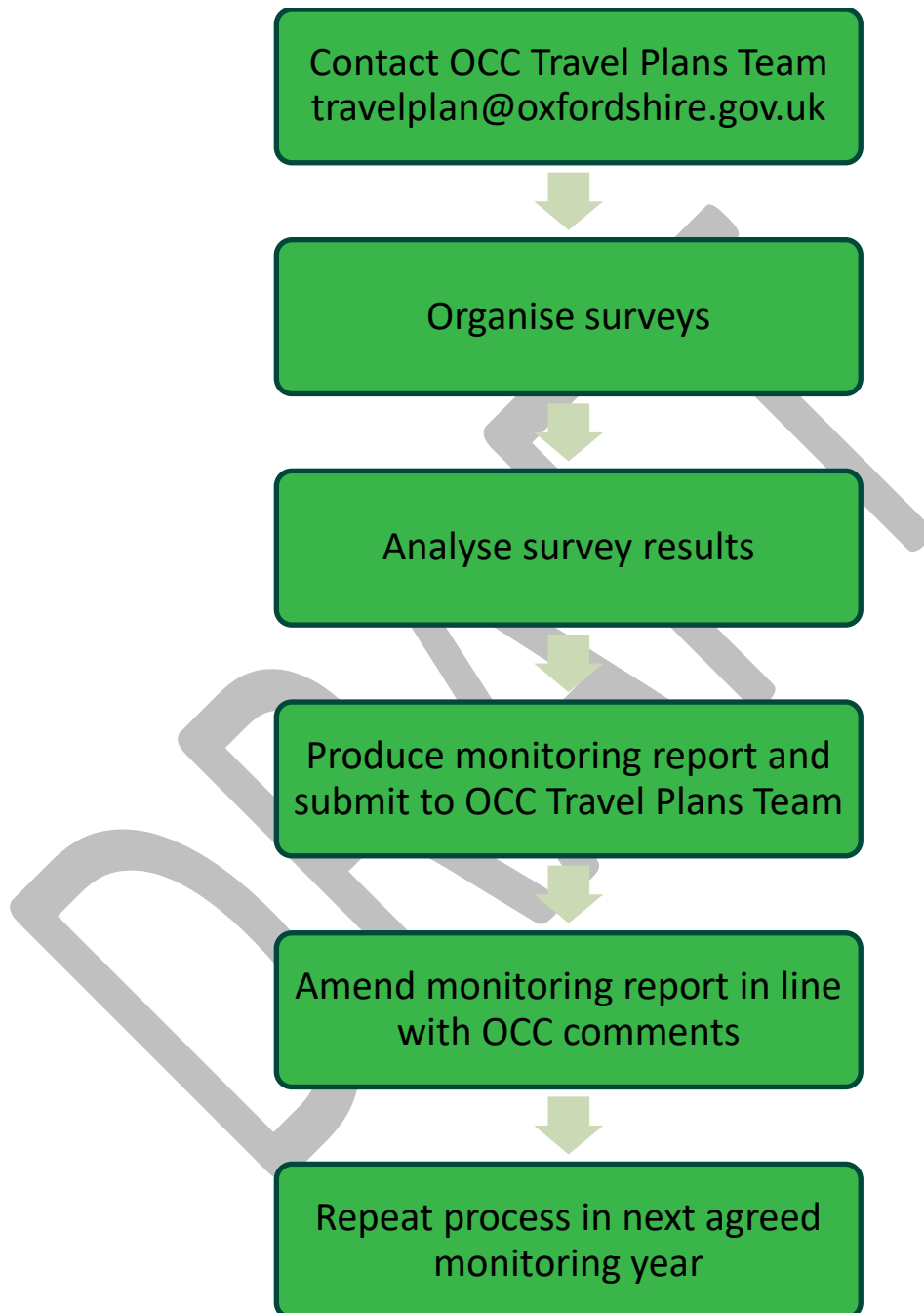
Future Actions

Monitoring reports are due in every year set out in the approved Travel Plan and as such, this process will be repeated when required. In between monitoring the Travel Plans Team are available to help with any queries and to provide advice to Travel Plan Coordinators. Please email travelplan@oxfordshire.gov.uk.

If targets are not met at the end of the initial period of monitoring, the Travel Plan should be reviewed, new measures introduced and monitoring extended for another two cycles; for example where monitoring has taken place in years 1, 3 and 5, if targets have not been met monitoring should continue in years 7 and 9. Further discussions regarding this will ensue with OCC if necessary.

Appendices

Appendix 1 - Process



Appendix 2 - Sample surveys

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Employee Travel Survey

Please note this is a template only, adapt and amend as required.

Guidance

- We recommend that you insert an introduction to provide information about the survey. Include: why it's being done, how to respond and if incentives to increase return rate are to be offered. Further information on the prize draw should be included at the end of the document.
- We recommend that this survey is completed online, however you could also distribute this in paper format if required.

Questions

About yourself	
Do you own a bicycle?	Yes [] No []
If yes, is your bicycle electric?	Yes [] No []
Do you own a car?	Yes [] No []
If yes, do you have an electric or hybrid vehicle?	No [] Hybrid [] Plug-in Hybrid (PHEV) [] Fully EV []
Do you have a Blue Badge?	Yes [] No [] Prefer not to say []
What is your home postcode?	

Travel to / from work

1. What mode of transport do you use most frequently to travel to work? Select the option you use for the longest time during the journey.

Mode of travel	Please tick one box
Walking	
Cycling	
Bus	
Train	
Community Transport (Dial a Ride, local minibus collection service)	
Car driver (alone)	
Car driver (with passenger)	
Car passenger	
Motorbike / scooter	
Taxi	
Work from home	
Other (please)	

2. Do you use any other modes of travel during your journey to work?

Mode of travel	Please tick all relevant modes
Walking	
Cycling	
Bus	
Train	
Community Transport (Dial a Ride, local minibus collection service)	
Car driver (alone)	
Car driver (with passenger)	
Car passenger	
Motorbike / scooter	
Taxi	
Other (please)	

3. How often do you travel to work in a typical week?

Frequency	Please tick one box
Every day	
5 times a week	
2-4 times a week	
Once a week	
Less often	

4. What time do you typically arrive at work?

Time	Please tick one box
10.01pm – 6am	
6.01am – 10am	
10.01am – 3pm	
3.01pm – 7pm	
7.01pm – 10pm	

5. How far typically is this trip?

Distance	Please tick one box
Less than a mile	
1 – 3 miles	
Over 3 miles	

6. Why do you choose this way of travelling?

Factors	Please tick all relevant factors
Cheapest	
Environmental reasons	
Healthiest option	
Lack of infrastructure	
Most convenient	
No other travel option	
Quickest	
Safety concerns	

Travel with others	
Work requirements	
Other (please explain further in adjacent box)	

7. What stops you from considering the following modes of travel?

Walking	Please tick all relevant barriers
N/A – I already walk	
Distance	
Health reasons	
Lack of infrastructure e.g. crossings or footpaths	
Safety concerns	
Time	
Work requirements	
Other (please explain further in adjacent box)	

Cycling	Please tick all relevant barriers
N/A – I already cycle	
Distance	
Don't feel confident riding a bike	
Don't own a bike	
Health reasons	
Lack of cycle parking	
Lack of infrastructure e.g. cycle lanes	
Safety concerns	
Time	
Work requirements	
Other (please explain further in adjacent box)	

Bus / train	Please tick all relevant barriers
N/A – I already use public transport	
Cost	
Distance from nearest bus stop or train station	
Journey times	
Lack of service information	

No service available	
Poor waiting facilities (e.g. shelter, seating, lighting)	
Safety concerns (e.g. personal safety, road safety)	
Work requirements	
Other (please explain further in adjacent box)	

Car sharing	Please tick all relevant barriers
N/A – I already car share	
Need to be flexible / can't commit to a journey on a regular basis	
Not knowing who to share with	
Prefer to drive alone	
Safety concerns	
Work requirements	
Other (please explain further in adjacent box)	

Electric Vehicle (EV)	Please tick all relevant barriers
N/A – I already drive an EV	
Don't know enough about EVs	
Lack of charging infrastructure at home	
Lack of charging infrastructure at my destination	
Purchase cost	
Vehicle range concerns	
Other (please explain further in adjacent box)	

8. What could encourage you to use the following modes of transport?

Mode of travel	Options	Please tick all relevant boxes
Walking	Better lighting near work	
	Lockers / changing facilities	
	Organised walking groups	
	Safer routes to / from work	
	Other (please state)	
	None of the above	
Cycling	Cycle maintenance kit	
	Cycle purchase scheme / cycle to work scheme	
	Cycle training	
	Lockers / changing facilities	
	More cycle parking	
	Other (please state)	
	None of the above	
Bus	Better bus stop facilities e.g. covered shelter, seating	
	More frequent service	
	Subsidised public transport tickets	
	Other (please state)	
	None of the above	
Train	More frequent service	
	Shuttle bus service to the station	
	Subsidised public transport tickets	
	Other (please state)	
	None of the above	
Car Sharing	Guaranteed ride home	
	Priority parking spaces	
	Ride share finding service	
	Other (please state)	
	None of the above	
Electric Vehicle	EV information	
	More EV charging points	
	Subsidised charging costs	
	Other (please state)	
	None of the above	

9. Please use the space below for any other comments or points that you would like to raise about your journey to / from work.

Business Travel

[The following section should be included if staff travel for work purposes during their working day]

The set of questions below relate to travel you undertake during your working hours. For example, this could be travel to meetings or site visits.

1. What mode of transport do you use most frequently?

Mode of travel	Please tick one box
Walking	
Cycling	
Bus	
Train	
Community Transport (Dial a Ride, local minibus collection service)	
Car driver (alone)	
Car driver (with passenger)	
Car passenger	
Motorbike / scooter	
Taxi	
Other (please)	

2. Do you use any other modes of travel during your business travel?

Mode of travel	Please tick all relevant modes
Walking	
Cycling	
Bus	
Train	
Community Transport (Dial a Ride, local minibus collection service)	
Car driver (alone)	
Car driver (with passenger)	
Car passenger	
Motorbike / scooter	
Taxi	

Other (please)	
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3. How often do you travel for business in a typical week?

Frequency	Please tick one box
Every day	
5 times a week	
2-4 times a week	
Once a week	
Less often	

4. How far typically is this trip?

Distance	Please tick one box
Less than a mile	
1 – 3 miles	
Over 3 miles	

5. Why do you choose this way of travelling?

Factors	Please tick all relevant factors
Cheapest	
Environmental reasons	
Healthiest option	
Lack of infrastructure	
Most convenient	
No other travel option	
Quickest	
Safety concerns	
Travel with others	
Work requirements	
Other (please explain further in adjacent box)	

6. What could encourage you to use the following modes for business travel?

Mode of travel	
Walking	
Cycling	
Bus	
Train	

Electric Vehicle	
Other (please)	

7. Please use the space below for any other comments or points that you would like to raise about business travel.

Thanks for your time, if you have any questions or require further information please contact your Travel Plan Coordinator **[insert name and contact details]**.

[Insert prize draw information if relevant]

Household Travel Survey

Please note this is a template only, adapt and amend as required.

Guidance

- We recommend that you insert an introduction to provide information about the survey. Include: why it's being done, how to respond, and if incentives to increase the return rate are to be offered. Further information on the prize draw should be included at the end of the document.
- We recommend that this survey is completed online, however you could also distribute this in paper format if required. You may also want to offer alternative formats e.g. large print, different languages.
- Parents/guardians to complete for under 18's.

Questions

About the household (this section should only be completed once per household)	
How many people are living in this household?	18 and over – 1 2 3 4 5 6 Under 18 – 1 2 3 4 5 6
How many bikes do you own?	Please enter number:
How many of these bikes are electric?	Please enter number:
How many of your household have a driving licence?	Please enter number: Prefer not to say []
How many cars do you own?	Please enter number:
How many of the cars are electric? Please specify whether they are hybrid, plug in hybrid or fully electric.	Electric: Plug-in Hybrid: Hybrid: None of the above:
How many Blue Badge Holders are in the household?	Please enter number: Prefer not to say []

journey on a regular basis									
Not knowing who to share with									
Prefer to drive alone									
Safety concerns									
Work requirements									
Other (please explain further in adjacent box)									

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Other (please explain further in adjacent box)									
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9. Please use the space below for any other comments or points that you would like to raise about the journeys you make.



Thanks for your time, if you have any questions or require further information please contact your Travel Plan Coordinator **[insert name and contact details]**.

[Insert prize draw information if relevant]

Visitor Travel Survey

Please note this is a template only, adapt and amend as required.

Guidance

- We recommend that you ask visitors at the point they sign-in / check-in depending on the nature of your business. However, for some places such as a shop or supermarket it may be more appropriate to ask when a customer makes a purchase.

Short survey template

1. What mode of transport did you use to travel today? Please select the mode used for the longest time during the journey.

Mode of travel	Please tick one box
Walking	
Cycling	
Bus	
Train	
Community Transport (Dial a Ride, local minibus collection service)	
Car driver (alone)	
Car driver (with passenger)	
Car passenger	
Motorbike / scooter	
Taxi	
Other (please)	

2. Car drivers only, was your car an Electric Vehicle (EV), PHEV (plug-in hybrid) or hybrid vehicle?

Mode of travel	Please tick one box
EV	
PHEV	
Hybrid	
None of the above	

3. Please use the space below for any other comments or points that you would like to raise about your journey to **[INSERT]**.

Longer survey template

Guidance

- For some businesses it may be appropriate to also email the visitor a survey to gain a more detailed insight into their travel patterns. Incentives can be offered for participating in this, such as a voucher or prize.

1. What date did you most recently travel to **[INSERT NAME]**?

DD/MM/YYYY

2. Where did you travel from on this journey? Please enter a postcode.

3. What mode of transport did you use on this journey? Please select the mode of transport used for the longest time during the journey.

Mode of travel	Please tick only one box
Walking	
Cycling	
Bus	
Train	
Community Transport (Dial a Ride, local minibus collection service)	
Car driver (alone)	
Car driver (with passenger)	
Car passenger	
Motorbike / scooter	
Taxi	
Other (please state)	

4. Did you use any other modes on this journey?

Mode of travel	Please tick all relevant modes
Walking	
Cycling	
Bus	
Train	
Community Transport (Dial a Ride, local minibus collection service)	
Car driver (alone)	
Car driver (with passenger)	
Car passenger	
Motorbike / scooter	
Taxi	

Other (please)	
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5. How often do you travel here?

Frequency	Please tick one box
This was my first time	
Once or twice a year	
Quarterly	
Every month	
Fortnightly	
Weekly	
More than once a week	

6. Why did you choose this way of travelling?

Factors	Please tick all relevant factors
Cheapest	
Environmental reasons	
Healthiest option	
Lack of infrastructure	
Most convenient	
No other travel option	
Quickest	
Safety concerns	
Travel with others	
Work requirements	
Other (please explain further in adjacent box)	

7. What stops you from considering the following modes of travel?

Walking	Please tick all relevant barriers
N/A – I already walk	
Distance	
Health reasons	
Lack of infrastructure e.g. crossings or footpaths	
Safety concerns	
Time	
Work requirements	
Other (please explain further in adjacent box)	

Cycling	Please tick all relevant barriers
N/A – I already cycle	
Distance	

Don't feel confident riding a bike	
Don't own a bike	
Health reasons	
Lack of cycle parking	
Lack of infrastructure e.g. cycle lanes	
Safety concerns	
Time	
Work requirements	
Other (please explain further in adjacent box)	

Bus / train	Please tick all relevant barriers
N/A – I already use public transport	
Cost	
Distance from nearest bus stop or train station	
Journey times	
Lack of service information	
No service available	
Poor waiting facilities (e.g. shelter, seating, lighting)	
Other (please explain further in adjacent box)	

Car sharing	Please tick all relevant barriers
N/A – I already car share	
Need to be flexible / can't commit to a journey on a regular basis	
Not knowing who to share with	
Prefer to drive alone	
Safety concerns	
Work requirements	
Other (please explain further in adjacent box)	

Electric Vehicle (EV)	Please tick all relevant barriers
N/A – I already use an EV	
Don't know enough about EVs	
Lack of charging infrastructure at home	
Lack of charging infrastructure at my destination	
Purchase cost	
Vehicle range concerns	
Other (please explain further in adjacent box)	

8. What could encourage you to use the following modes of transport?

Mode of travel	Options	Please tick all relevant boxes
Walking	Better lighting nearby	
	Lockers / changing facilities	
	Organised walking groups	
	Safer routes to / from work	
	Other (please state)	
	None of the above	
Cycling	Cycle maintenance kit	
	Lockers / changing facilities	
	More cycle parking	
	Other (please state)	
	None of the above	
Bus	Better bus stop facilities e.g. covered shelter	
	More frequent service	
	Subsidised public transport tickets	
	Other (please state)	
	None of the above	
Train	More frequent service	
	Shuttle bus service to the station	
	Subsidised public transport tickets	

	Other (please state)	
	None of the above	
Car Sharing	Priority parking spaces	
	Ride share finding service	
	Other (please state)	
	None of the above	
Electric Vehicle	Information about EVs	
	More EV charging points	
	Subsidised charging costs	
	Other (please state)	
	None of the above	

9. Please use the space below for any other comments or points that you would like to raise.

Thanks for your time, if you have any questions or require further information please contact the Travel Plan Coordinator **[Insert TPC name and contact]**.

[Insert prize draw information if relevant]