

Travel to Work Snapshot Survey 2013

North Bristol SusCom Organisations' Summary

Results in brief

This year's survey took place on Tuesday 12th March with 27 organisations participating from across South Gloucestershire. The Council has produced its own summary of the results. This summary is looking at the combined results of the 16 North Bristol SusCom member organisations that participated in the survey.

Overall, 16 SusCom member organisations took part, 5 more than in 2012. The majority of organisations increased the percentage of their staff participating compared to last year, although the overall response rate has decreased slightly due to the inclusion of several additional large organisations. 5,317 SusCom member's employees responded to the survey, 12.7% of the overall 42,023 total SusCom member employee numbers.

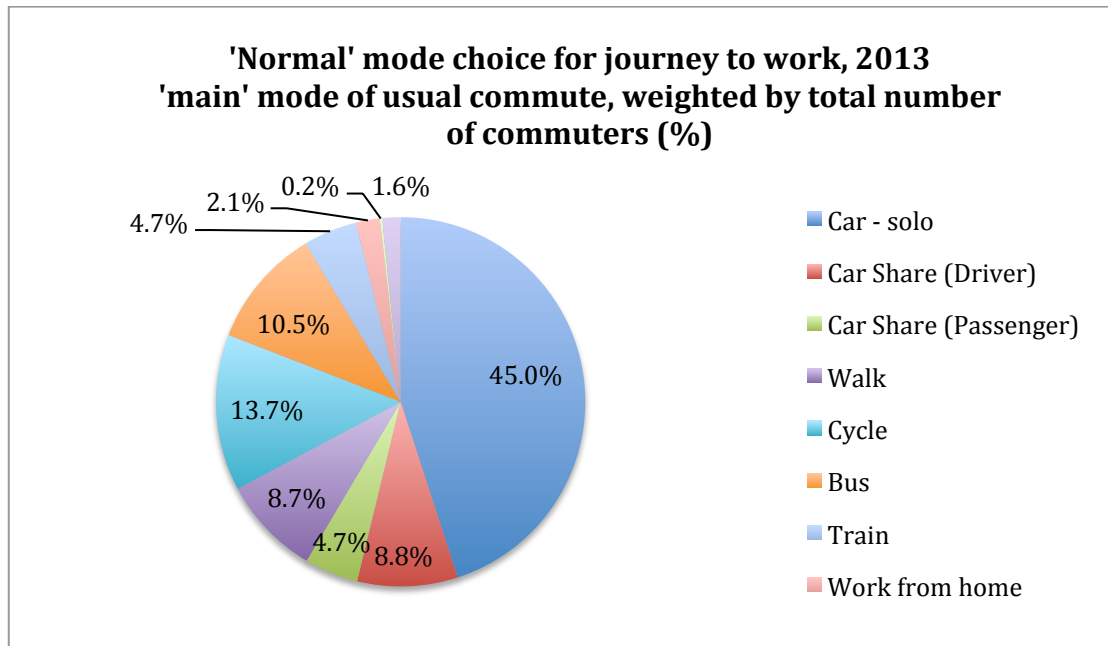
Compared to 2012, results show a 5.3% reduction in the number of Single Occupancy Car drivers, and a 8.2% collective increase in walkers, cyclists, car sharers and bus users. A 2.6% decrease in train users was also reported, along with slight decreases in dedicated home-workers. The survey also asked if respondents would consider using alternative travel modes for their commute in the next 6 months. The 3 most popularly considered options were Working from Home (37.7% of respondents), Car Sharing (26.3%) and Cycling (22%). Please see the following Summary and Full Results for more details.

Overall Participation rates - 2013

	North Bristol SusCom Members
Participating Organisations	16
Total Employee Numbers	42,023
Sample Size	5,317
Response Rate	12.7%

'Normal' mode choice for main portion of commute

Mode	Modal Split (%) North Bristol SusCom members
Car Driver - solo	45.0
Car Driver (Car-Share)	8.8
Car Passenger (Car-Share)	4.7
Walk	8.7
Cycle	13.7
Bus	10.5
Train	4.7
Work from Home	2.1
Motorbike/Scooter	0.2
Other	1.6
Total	100.0



Single Car Occupancy Car vs. Shared, Active or Public Modes

Snapshot Year	North Bristol SusCom Members	
	2012	2013
Car Driver Solo	50.2	45.0
All Other Modes	49.8	55.0

2012 – 2013 comparison

Between 2012 and 2013, the key results (weighted by total number of commuters) are, as follows:

- a 5.3% decrease in single occupancy car drivers
- a 0.8% increase in car sharers
- a 1.4% increase in walkers
- no change on the number of cyclists
- a 6.0% increase in bus users
- a 2.6% decrease in train users
- a 0.3% decrease in home workers
- no change in the number of motorcycle and scooter users

Full Results: North Bristol SusCom Members Only

Context

As a 'snap shot', South Gloucestershire's annual Travel to Work Survey is designed to capture an accurate picture of travel choices on a specific day, yet due to weather fluctuations and varied travel patterns it also captures data on how participants feel they 'normally' travel.

This year's survey took place primarily on Tuesday 12th March, with most organisations making the link available for several days afterwards. Despite this extended period, participants were asked to refer back to Tuesday 12th March when answering the 'How do you travel today' question.

The weather in South Gloucestershire during the survey period was unseasonably cold, with temperatures ranging between 5° and -4°C throughout the week. For example, Tuesday 12th March had a high of 2°, low of -4°, a very strong NE wind and some patches of snow.

Notes on data

'Normally' vs 'Today' data

In previous years the main findings of this survey have been drawn from the question 'Today how did you travel to work?' due to the assumption that participants are likely to report 'aspirational' behaviours rather than actual behaviours if asked how they 'normally' travel. This year, however, we have used the 'normally' data, due in main to the very bad weather during the survey period, but also to demonstrate more normative tendencies as many people don't travel in the same way every day. We have presented these alongside the corresponding 'normally' figures from 2011/12 for valid year-on-year trends. See Appendix 1 for 'Today' figures and how these differ from 'normal' mode choices.

Weighting

The percentages below have been weighted by the total number of employees in each organisation and extrapolated to represent the whole possible sample size of the 42,023 employees of the 16 North Bristol SusCom participating organisations. Although extrapolating the data makes the assumption that the survey sample, per organisation, is representative of all staff in that organisation, we have chosen this approach to offer the 'biggest picture' possible of commuter travel across the participating organisations, and within this to reflect the relative size and trend of each organisation. We have not further weighted the data to account for non-respondents (in this case it is assumed that single occupancy car drivers are slightly

less likely to participate in the survey than people travelling by alternative modes) which may lead to a slight skewing of the data in favour of sustainable modes. For percentage breakdowns of the total actual sample only see Appendix 2.

Variation in participating organisations

This year, two SusCom organisations from 2012's sample did not participate, but seven additional SusCom companies joined the sample (one took part last year but was not a member of SusCom at the time). This variation in participation impacts both the trend in overall response rate and the direct comparability of the data year-on-year.

This year, the addition of new organisations, adding 12,666 employees to the total possible sample, has meant a slight decline in overall response rate despite most regular participating organisations improving their individual response rates from 2012. This variance also means that the sample of responding employees will be quite different each year. Accordingly, the below figures can only reliably provide a guide to the total mode ratio for participating organisations, year-on-year, and does not provide a direct comparison of change amongst a longitudinal sample.

Omission of 2011 figures

In this North Bristol SusCom analysis we are not providing any figures from 2011 for comparison as only 4 of our members participated in the survey that year.

Overall Participation rates

	North Bristol SusCom Members only	
Snapshot Year	2012	2013
Participating Organisations	11	16
Total Employee Numbers	29,357	42,023
Sample Size	3,911	5,317
Response Rate	13.3%	12.7%

'Normal' mode choice for main portion of commute

Single Occupancy Car vs. All Other Modes (%)

	North Bristol SusCom Members	
Snapshot Year	2012	2013
Car Driver Solo	50.2	45.0
Sustainable modes	49.8	55.0

Car Users (%)

	North Bristol SusCom Members	
Snapshot Year	2012	2013
Car Driver Solo	50.2	45.0
Car Sharing (driver/passenger)	12.7	13.5
Car Users	63.0%	58.5%

Active Travel %

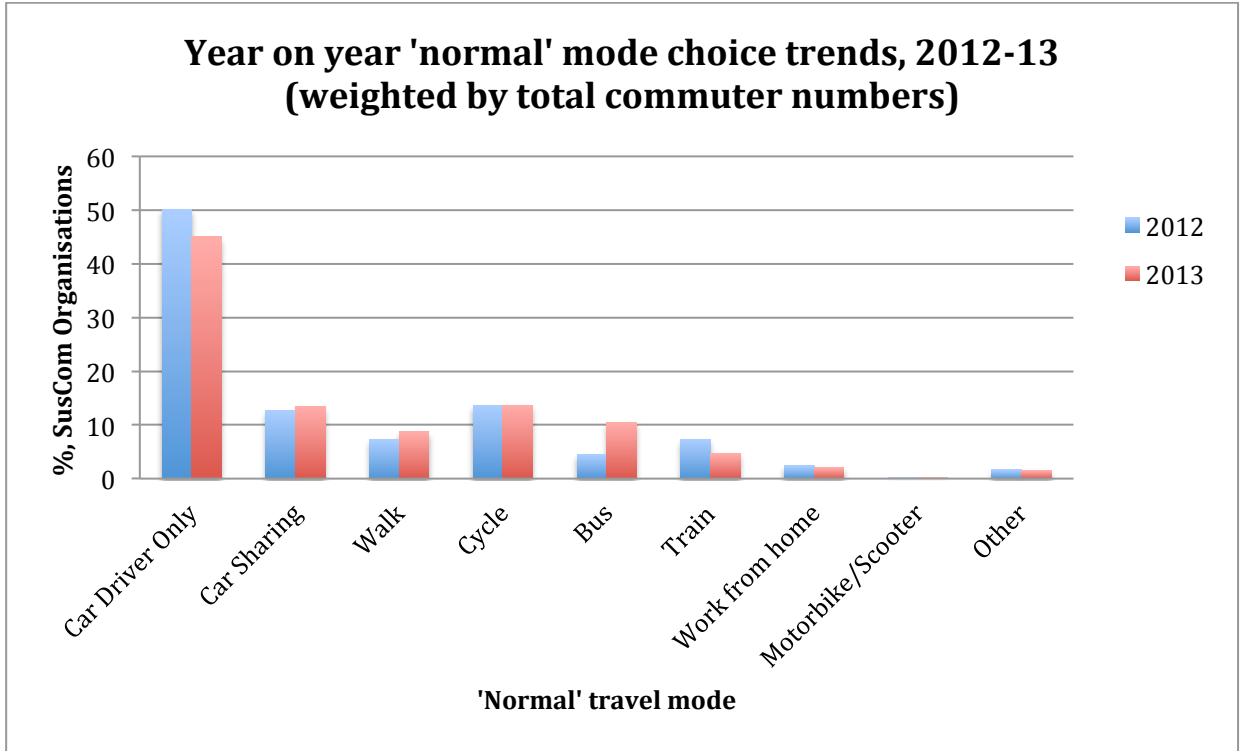
	North Bristol SusCom Members	
Snapshot Year	2012	2013
Walk	7.3	8.7
Cycle	13.7	13.7
Active Travel	21.0%	22.4%

Public Transport %

	North Bristol SusCom Members	
Snapshot Year	2012	2013
Bus	4.5	10.5
Train	7.3	4.7
Public Transport	11.7%	15.2%

Other %

	North Bristol SusCom Members	
Snapshot Year	2012	2013
Work from Home	2.4	2.1
Motorbike/Scooter	0.2	0.2
Other	1.7	1.6



Attitudes to sustainable modes: All organisations

“In the next 6 months would you consider using any of the following travel options for any of your journeys to work?” (% weighted by total responses)

	Yes	No	Not Sure	Already use this mode	Did not respond
Walk	12.4%	56.4%	1.9%	15.6%	13.8%
Bus	17.9%	50.6%	5.4%	13.6%	12.5%
Train	11.4%	61.3%	3.2%	8.2%	15.9%
Motorbike/Scooter	6.0%	65.5%	1.6%	8.4%	18.5%
Working from Home	37.7%	33.0%	3.9%	11.6%	13.8%
Cycle	22.0%	43.7%	4.8%	18.9%	10.6%
Car Share	26.3%	36.9%	7.2%	13.0%	16.5%

Reported barriers to sustainable travel choices

“If you normally travel to work by university by car on your own, please explain why you prefer to travel by car on your own, rather than car sharing, using public transport, walking or cycling” (in order of popularity). 62.2%, of the 5,317 sample, answered this question.

NB: respondents could select multiple answers

Public transport takes too long	33.0%
Public transport is too expensive	30.4%
Direct public transport services are not available from where I live	30.3%
I live too far to walk/cycle	29.0%
Public transport is unreliable	24.6%
Public transport times are not convenient	21.0%
My shift/timetable patterns make it difficult to plan or use alternative to the car	20.0%
Public transport services are not frequent enough	16.9%
Public transport is not available at the time I travel	16.2%
I need to stop off on the way to/from work/university (e.g. shops, gym, visit relatives)	16.0%
I need to drop off/collect children on the way to work/after work	12.3%
Walking/cycling is too dangerous	12.2%
I need a car during the day	11.1%
Walking/cycling is not practical (eg. no secure place to leave bike/no showers or lockers)	10.0%
I need to bring equipment to/from work	9.7%
I have tried but cannot find anyone to car share with	7.8%
Public transport services do not stop near to work/university	7.4%
I don't know how to find people to car share with	4.4%
I need to drop off/collect other people on the way to work/after work	2.7%
No Reply	37.8%

Appendix 1

Comparison between 'Normally' and 'Today' data

Tuesday 12th March 2013, % weighted by total employee number

	Normally	Today	
Co. size (no. employees)	42,023	42,023	
Sample Size	5,317	5,317	
Response rate (%)	13.3%	13.3%	
Modal Split (%)			Difference Normally vs. Today (+/-)
Car Driver Only	45.0	46.5	+1.5
Car Sharing (driver/passenger)	13.5	13.0	-0.5
Car Users Total	58.5	59.5	+1.0
Walk	8.7	8.3	-0.4
Cycle	13.7	10.4	-3.3
Active Transport Total	22.4	18.6	-3.8
Bus	10.5	9.9	-0.6
Train	4.7	4.6	-0.1
Public Transport Total	15.2	14.5	-0.7
Work from home	2.1	1.6	-0.5
Motorbike/Scooter	0.2	1.6	+1.4
Other	1.6	4.2	+2.6

NB: The 'Other' data for 'Today' includes 'I did not attend work today' responses.