

National workplace travel survey

Survey guide

May 2008 – version 1

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ISBN 978-0-478-30969-0



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Land Transport New Zealand
Published May 2008

ISBN 978-0-478-30969-0

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Introduction

Land Transport New Zealand's Travel Behaviour Change programme aims to promote more efficient and sustainable travel behaviour. The programme encourages individuals to voluntarily change their travel behaviour towards choosing more sustainable methods of travel and reducing the need for travel.

The programme includes the development and implementation of workplace travel plans to encourage staff to travel to/from work and during work time for business purposes by public transport, on foot, by bicycle, by car pooling and through improved access to the workplace.

Land Transport NZ provides a *National workplace travel survey* (hereafter referred to as the *National survey*) to support workplace travel plans. The survey will help local authorities benchmark and monitor the work-related travel behaviour, habits and choices associated with different methods of travel in workplaces in their region. The aggregated information will also help Land Transport NZ to benchmark and monitor travel planning programmes throughout New Zealand.

The *National survey* has two broad objectives:

- 1 The first objective is to gather information that can help develop a customised travel plan.
- 2 The second objective is to collect data to meet Land Transport NZ's monitoring requirements.

The survey is just one of a number of tools to help workplaces develop and monitor their workplace travel planning activities. In addition to the survey, organisations should gather information from a range of other sources, such as staff workshops and focus groups, audits and reviews of relevant organisational data (including corporate vehicle logbooks, use of taxi vouchers and other domestic work-related travel data).

This guide has been designed to assist Land Transport NZ to work with local authorities and workplaces participating in travel planning programmes. The guide covers:

- using the *National survey*
- understanding the different stages in the survey process
- marketing and promoting the workplace survey
- analysing and reporting on the survey results.

Please note that this guide focuses on conducting baseline surveys and analysing baseline data. Further information will be provided at a later date to help organisations collect and analyse monitoring data.

About the survey

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

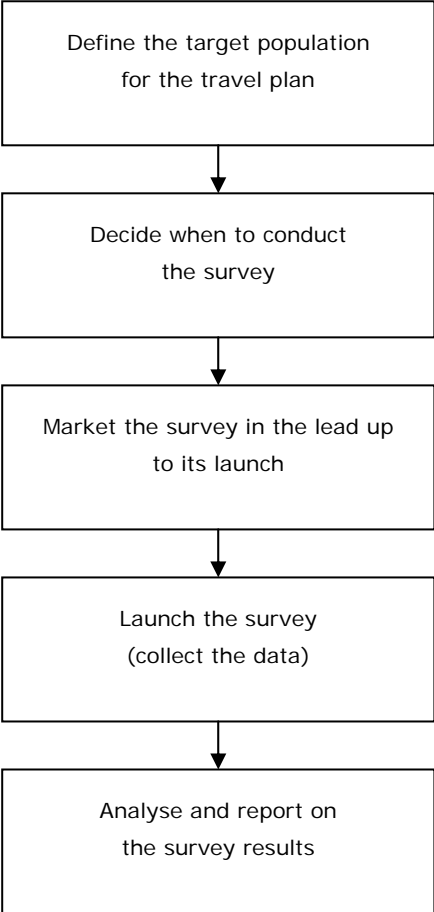
- 1 kilometres travelled by different modes, eg. cycle, car etc.
- 2 methods of travel to work over a week
- 3 working hours (usual start and finish times)
- 4 reasons for current travel arrangements
- 5 travel time (ie the usual amount of time it takes to travel from home to work)
- 6 whether travel arrangements are the same for the journey home
- 7 barriers to more sustainable travel and triggers that would facilitate behaviour change
- 8 staff profiling questions (covering age and gender) to assist in sample evaluation and to determine whether there are different travel patterns
- 9 Govt³ surveys also cover attitudes to business travel, including barriers and triggers to facilitate behaviour change
- 10 degree of control the respondent has over meeting attendance.

Land Transport NZ has concentrated on keeping the questionnaire short to minimise the burden on respondents and to focus on issues that apply in a wide range of workplaces across the country.

Overview of the survey process

The process for conducting the *National survey* follows a number of defined steps, as shown in figure 1. Each of these steps is described in more detail in the following sections of this survey guide.

Figure 1 Process for conducting the *National survey*



Defining 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 will determine:

- 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).

Please note that, for the purpose of the *National 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 monitoring and travel planning purposes to capture the site where the employee works.

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

Surveying employees who work across more than one site

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

Using an online survey

An online survey has a number of advantages over a paper survey, eg:

- survey costs are lower (the distribution costs are minimal and there are no printing or data entry costs)
- it is easier to distribute the survey to employees
- the response rate is likely to be higher
- less time is required to administer the survey, process the data and analyse the results.

To administer the survey online, a current individual email address for each member of the target population is required. Care needs to be taken to ensure that:

- there are no duplicates (ie each person only has one email address)
- the list *only includes* members of the target population (ie former employees, visitors and others have been excluded)
- email details are correct.

Email-based pre-survey marketing provides a good opportunity to check the list by monitoring and investigating the emails that bounce back.

Deciding when to conduct the survey

Careful consideration needs to go into the timing of the survey both in terms of where it is positioned in the project plan and also to avoid public holidays, school holidays and any other periods when a significant proportion of employees are typically absent from work.

For monitoring purposes, it is also preferable to choose a time of year other than mid-winter, when less people are likely to be absent from work due to illness and to also allow more meaningful cross-regional and national comparisons when weather conditions are more comparable across the country.

A minimum overall lead time of 6–8 weeks is needed to allow sufficient time to plan and promote the survey.

Marketing the survey

Effective marketing will maximise participation in the survey, (and buy-in for the travel plan as a whole), 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 approximately two weeks before the data collection is due to start.

Communication methods and messages should be customised to take into account the organisational culture (i.e. using existing communication channels while also creating a point of difference) and the resources and budget available to promote the survey.

Suggested pre-survey marketing methods

The following methods of pre-survey promotion have been successfully used to inform people in other organisations and encourage them to participate in their workplace 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
- site visits by travel planning project team members to inform people about the survey, answer questions and encourage participation.

Incentives

Incentives should be determined individually for each workplace, taking into account factors such as the culture of the organisation, general staff willingness to participate in surveys and particular interest in travel.

If an incentive is offered, it should not relate to the subject of the survey (i.e. it should not be a travel-related incentive), as this may bias responses.

Implementing the survey

This is the stage in the process when the data is collected.

All surveys need to be conducted in accordance with the New Zealand Privacy Act 1993. At the core of the Privacy Act are 12 information privacy principles that cover the collection, storage, use and disclosure of personal information. See www.privacy.org.nz/library/fact-sheet-no-2-information-privacy-principles for full text.

To satisfy Land Transport NZ's monitoring requirements, it is necessary to collect some personal details from employees, particularly information about where people live. This information is used to map and calculate travel distances from individual home locations to the workplace and may also be used to help develop personalised journey planners or similar initiatives. Names may be collected if an incentive is offered to respondents (for a prize draw) or if respondents choose to receive follow-up contact or wish to participate further in the travel plan process.

Reasons for collecting the information are explained in the survey introductory script/covering letter and in the preamble to some of the survey questions. We ask that each workplace sign a confidentiality agreement before the survey is launched.

Preparation of the online survey

To prepare the online survey for your organisation, Land Transport New Zealand will require a number of things including:

- A completed survey request form
- A confidentiality agreement signed by your organisation and Land Transport New Zealand
- A web ready image of the organisations logo
- A survey 'go live' date and length of survey period
- A single point of contact for all matter relating to the preparation of the online survey

Once this information has been received, Land Transport New Zealand will prepare a draft of the online survey for you to review. Once the online survey is finalised a link will be forwarded to the contact person which can be emailed to all staff to then complete the survey.

Preparing to distribute the survey

The following steps should be taken before distributing the online survey:

- obtain a list of email addresses of all members of the target population who will be surveyed ensuring that ex staff members etc have been removed.
- draft an email which the link to the survey will be sent with explaining about the survey and when it should be completed by. Decide who the email will be sent from (e.g. the CE)
- implement the pre-survey marketing plan
- identify support staff to assist employees who are having difficulty accessing the survey or completing any aspect of it.

Once the link to the finalised survey is ready, it can be emailed to all staff and they can complete the survey 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 1–2 weeks. The response rate may then rapidly decline. It is therefore suggested that the survey is kept open for a period of 2–3 weeks, with close monitoring of the response rate.

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

More time-consuming and expensive methods, which are probably more effective, 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.

Analysis and reporting

Data analysis

The data analysis is aimed at gathering knowledge on:

- baseline travel behaviour
- reasons for current travel behaviour
- factors that influence the behaviour
- effect of factors relating to site and organisational structure
- willingness to consider alternatives
- barriers and triggers to changing to more sustainable travel.

Land Transport NZ's survey tool produces a simple web based 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 data, which can be opened in Excel for further analysis. This will enable advanced users to carry out more in-depth data analysis and to further customise the way in which results are presented. This may include cross-tabulations of data, and additional charts or graphs.

If more sophisticated analysis is required, dedicated statistical software such as SPSS and SAS may be used.

The responsibility for the analysis of individual workplace data and free text responses will be determined between the approved organisation and the workplace that is participating in the travel planning programme.

For travel planning purposes, it may also be appropriate to analyse the data by age and gender, to determine if there are differences between groups.

Reporting

Once data has been collected from the survey, it is important to prepare a brief report that brings together the information in a clear and logical format for use by those responsible for developing the travel plan. The survey report may be a stand-alone document or a component of a wider travel plan research 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).

In general, the report will include:

- a clear statement of the target population
- an overview of the methodology, including the response rate and any issues associated with the survey administration
- a summary of the key findings of the survey
- a summary of any other data collection undertaken in association with the travel planning programme and the findings of this
- the survey results noting key features and unexpected findings (detailed tables can 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 and travel times. These benchmark figures are vital for measuring changes in staff travel patterns.

Sharing survey results with staff

To maintain support for the travel plan and encourage behaviour change, it is important to 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
- offering feedback sessions at staff meetings.